THE FRENCH AUTOMOTIVE INDUSTRY

→ ANALYSIS & STATISTICS 2024 EDITION

CCFA

8.8 million vehicles — Produced by the Stellantis and Renault groups worldwide in 2023

17% — Market share of electric cars in France in 2023

€5.7 billion — R&D expenditure for the automotive branch in France in 2022

€58 billion — Exports of automotive industrial products from France in 2023

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

85% — Share of domestic freight transport in France by road

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“The French Automotive Industry – Analysis and Statistics” can be downloaded from the CCFA website for €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

In 2024, the global automotive sector continued its recovery for the third consecutive year and has now returned to the record levels observed at the end of the 2010s. While the multiple crises (Covid in 2020, semi-conductor shortage in 2021, war in Ukraine in 2022, etc.) and their consequences (inflation, including energy inflation) have generally been absorbed, the market in Europe remains well below the volumes recorded previously, despite a significant increase in 2023. Moreover, the context of production overcapacity has intensified and toughened competition between players. Looking ahead to 2025, in a context marked by contrasting global energy transition strategies, we need to pursue consistent, sustainable and realistic electrification trajectories in order to achieve long-term objectives for decarbonising transport.

As far as the analysis of 2023 figures is concerned, global vehicle production increased by 10%, after a 6% increase in 2022 and a 3% increase in 2021. Production amounted to 93.6 million vehicles, which is the average level for the 2015-2019 period, the historic peak for the automotive sector. While the recovery was present across all regions in 2023, there have been contrasts in scale over the past three years. Ultimately, while the automotive sector has far exceeded its previous peaks in zones such as China, India and in ASEAN, it still remains in sharp decline in the traditional automotive industry countries, such as the United States (-8%), Japan (-5%), and particularly Western Europe (-22%).

In this context that is still highly favourable to Asian markets, the Renault and Stellantis groups, which are firmly established in the “open” continent of Europe, are facing strong competition in these countries. They are continuing to develop opportunities in other zones, such as South America and Africa.

In 2023, the Renault and Stellantis groups produced 8.3 million light vehicles, amounting to almost 9% of global vehicle production.

The energy transition is underway and the popularity of electric vehicles is increasing, though more moderately than before. In Western Europe, the market share of battery-powered electric cars reached 17% in 2023 and 34% for hybrids (rechargeable and non-rechargeable). The Renault and Stellantis groups have kept up with the evolution of demand with more launches of electric or hybrid versions.

Automotive mobility had 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, although they are still 5% below pre-Covid levels. In France, despite the context of the development of public transport services, road transport still accounted for 82% of personal journeys and 85% of tonnages transported for goods in 2023.

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

- The energy transition is taking us towards decarbonisation throughout the entire lifecycle. Firstly, this means developing sales of battery-powered electric vehicles, which need to be made more affordable for customers. In France in 2023, government grants and the development of charging infrastructure led to a favourable environment for the sale of electric vehicles. In other countries, their absence or their format poorly suited to the market, particularly in countries with a lower standard of living (southern and eastern Europe), have resulted in the slower emergence of electrification. This makes it very difficult to pursue trajectories resulting from the Green Deal. Government support has also allowed the creation of battery production sites as part of a vertical integration strategy, but competition is intense here too. The stability of the support and the competitiveness of the France site (energy prices, production tax) are key factors for the emergence of this new activity. 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 are 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.

Major geopolitical events (Covid, Russia-Ukraine, Middle East, etc.) have a general effect on the economy, but the automotive sector must also deal with other factors, including the shortage of electronic components, the instability of support mechanisms for electrification, and the loss of competitiveness of the European continent, which is the go-to market for French groups. In this uncertain and highly competitive environment, manufacturers must continue to invest so that they can satisfy customers, adapt their industrial processes to manufacture electric vehicles, meet regulatory standards (environmental, for instance), as well as prepare for digital and service transitions. Total R&D spending in France held up during the Covid crisis, rising to almost 5.7 billion euros in 2022. According to the INPI (French Industrial Property Institute), four of the top ten patent applicants came from the automotive industry in this period. In an unfavourable competitive context, improved by the R&D tax credit (CIR), the sector employs more than 25,000 full-time researchers.

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, which itself has lost a lot of ground compared with the other major automotive regions (China, North America). It is necessary to pursue the adaptation of industrial resources, the control of electricity costs and 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 cars, 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 Automobile Trade Association (Chambre Syndicale de l'Automobile – CSA). In 1909, automotive manufacturers became independent and founded the French car manufacturers' association (Chambre Syndicale des Constructeurs d'Automobiles – CSCA), which was replaced in 1991 by the French Automobile Manufacturers' Association (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 of Metallurgy Industries and Trades (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 Automotive and Mobility Sector Platform (Plateforme Filière Automobile et Mobilités – PFA) for communication and lobbying.

Other branches of the industrial automotive 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 Federation of Bodybuilding, Industries and Services, 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, Centre for the promotion and excellence of rubber).

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 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 Automobile and Motorcycle Union (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.

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

The CCFA is also a member of the International Organization 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 Automobile Trade Association was founded

CCFA

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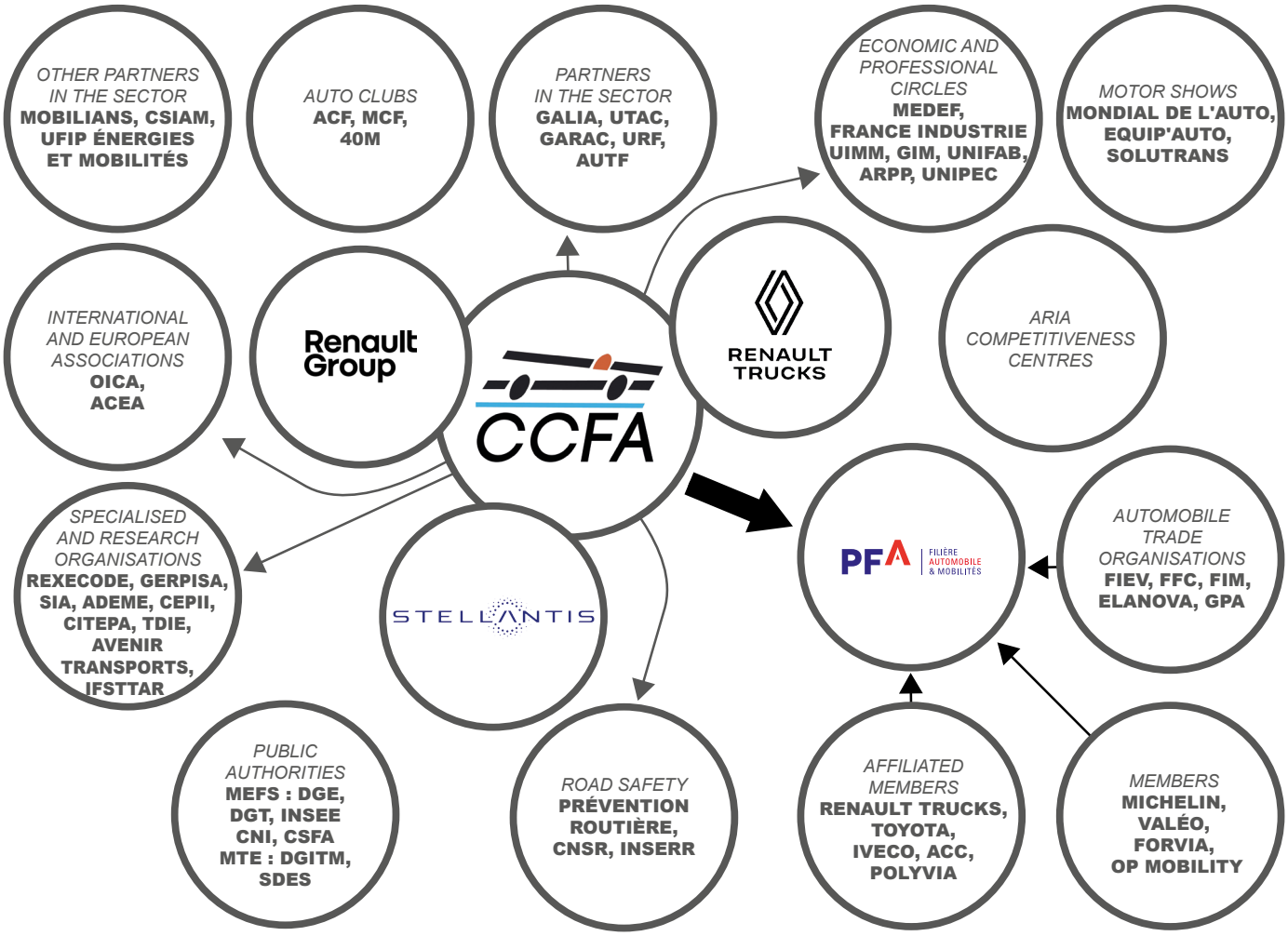
THE CCFA AND ITS PARTNERS IN 2023



► INTERNATIONAL AND EUROPEAN MANUFACTURERS' ASSOCIATIONS

OICA: International Organization of Motor Vehicle Manufacturers
ACEA: European Automobile Manufacturers' Association

► PARTNERS IN THE SECTOR

GALIA: Groupement pour l'Amélioration des Liaisons dans l'Automobile
UTAC: Union Technique de l'Automobile, du Motocycle et du Cycle
GARAC: École Nationale des Professions de l'Automobile
URF: Union Routière de France
AUTF: Association des Utilisateurs de Transport de Fret
MOBILIANS: Professional organisation for the distribution and services of cars, industrial vehicles, bicycles and motorcycles
UFIP-E&M: Union Française des Industries Pétrolières
CSIAM: Chambre Syndicale Internationale de l'Automobile et du Motocycle

► SPECIALISED AND RESEARCH ORGANISATIONS

CEPII: Centre d'Études Prospectives et d'Informations Internationales
SIA: Société des Ingénieurs de l'Automobile
AIRPARIF: Association for the monitoring of air quality in Île-de-France
GERPISA: Groupe d'Études et de Recherche Permanent sur l'Industrie et les Salariés de l'Automobile
ADEME: Agence de l'Environnement et de la Maîtrise de l'Énergie
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
MCF: Mobilité Club France (ex ACA)
40M: 40 millions d'Automobilistes

► PUBLIC AUTHORITIES

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: Representation of Industry in 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: Manufacturers' Union for the International Protection of Intellectual Property
ARPP: Autorité de Régulation Professionnelle de la Publicité

► AUTOMOBILE TRADE ORGANISATIONS

FFC: Fédération Française de la Carrosserie
FIEV: Fédération des Industries d'Équipements pour Véhicules
FIM: Fédération des Industries Mécaniques
ELANOVA: Centre for the promotion and excellence of rubber
GPA: Groupement Plasturgie Automobile

► ROAD SAFETY

CNSR: Conseil National de la Sécurité Routière
INSERR: Institut National de la Sécurité Routière et de Recherches
APR: Association Prévention Routière

THE GLOBAL AUTOMOTIVE SECTOR HAS FINALLY MADE A RECOVERY AFTER THREE DIFFICULT YEARS LINKED TO THE CONSEQUENCES OF THE HEALTH CRISIS, INCLUDING THE SHORTAGE OF PARTS

In 2023, for the first time since the health crisis, European markets recorded double-digit growth thanks to the end of the shortages that had severely impacted industrial activity in 2021 and 2022. The automotive industry had dealt with the shortage of certain inputs (especially semi-conductors) and subsequently with price increases for energy and raw materials. The recovery in 2023 did not, however, allow Europe to reach its pre-Covid levels and the Western European automotive market remained 16.4% down on its 2019 level.

As for markets outside Europe, the North American automotive market did not recover its pre-Covid levels, despite double-digit growth, while Asian markets, with the exception of Korea and Japan, exceeded their 2019 volumes. These contrasting performances between zones, as well as geopolitical tensions, explain those of the Stellantis (excluding FCA) and Renault groups, which are seeing an increase in deliveries to Europe but a decrease outside Europe.

► KEY DATA (IN THOUSANDS)

	1997	2007	2019	2022	2023	Variation 2023/2022	Variation 2023/2019
World production: Stellantis (excluding FCA), Renault group	**4,046**	**6,188**	**7,271**	**5,053**	**5,239**	**4%**	**-28%**
Passenger cars	3,472	5,301	6,246	4,162	4,123	-1%	-34%
Light commercial vehicles	507	830	1,025	891	1,116	25%	9%
Total light vehicles	3,979	6,131	7,271	5,053	5,239	4%	-28%
Heavy trucks (at constant scope)	36	58	n/a	n/a	n/a	-	-
Production in France: Stellantis (excluding FCA), Renault group	**2,525**	**2,573**	**1,885**	**1,110**	**1,212**	**9%**	**-36%**
Passenger cars	2,235	2,165	1,375	738	735	0%	-47%
Light commercial vehicles	258	352	510	373	477	28%	-6%
Total light vehicles	2,493	2,518	1,885	1,110	1,212	9%	-36%
Heavy trucks	30	55	n/a	n/a	n/a	-	-
Deliveries outside France: Stellantis (excluding FCA), Renault Group, Renault Trucks	**2,822**	**4,697**	**5,605**	**3,771**	**4,051**	**7%**	**-27%**
Passenger cars	2,526	4,110	4,826	3,010	3,154	5%	-34%
Light commercial vehicles	276	549	758	736	871	18%	15%
Total light vehicles	2,802	4,659	5,515	3,746	4,025	7%	-27%
Heavy trucks	20	38	21	25	26	1.5%	22%
Deliveries outside the EU, EFTA, UK: Stellantis (excluding FCA), Renault Group, Renault Trucks	**-**	**-**	**2,096**	**1,581**	**1,588**	**0.5%**	**-24%**
Passenger cars	-	-	1,912	1,298	1,262	-3%	-34%
Light commercial vehicles	-	-	178	273	316	16%	78%
Total light vehicles	-	-	2,089	1,571	1,578	0%	-24%
Heavy trucks	-	-	7	10	10	1.2%	42%
Registrations in France: all makes	**2,068**	**2,629**	**2,756**	**1,927**	**2,209**	**15%**	**-20%**
Passenger cars	1,713	2,110	2,214	1,529	1,775	16%	-20%
Light commercial vehicles	313	461	480	348	379	9%	-21%
Total light vehicles	2,026	2,571	2,694	1,877	2,154	15%	-20%
Heavy trucks	39.3	52.5	55.2	44.0	48.9	11%	-12%
Coaches and buses	3.1	5.5	6.4	5.4	5.7	5%	-11%
Registrations in 17 European countries: Stellantis, Renault group, Renault Trucks	**3,300**	**3,906**	**4,613**	**3,546**	**3,933**	**11%**	**-15%**
Passenger cars	2,841	3,181	3,738	2,848	3,106	9%	-17%
Light commercial vehicles	432	690	849	672	799	19%	-6%
Total light vehicles	3,273	3,871	4,587	3,520	3,905	11%	-15%
Heavy trucks	27	35	26	26	28	8%	8%

(1) The FCA group, a member of Stellantis, produced 3.5 million vehicles worldwide in 2023.

In 2023, global GDP grew by 3.2% and inflation, though still high, entered a slowdown phase. Global vehicle production increased by 10% in 2023, returning to its pre-Covid levels. This upturn in industrial activity in the automotive sector has allowed the recovery of global markets.

In this context, the Renault and Stellantis (excluding FCA) groups have seen production increases of 4%, benefiting primarily from the recovery of European markets. Their global deliveries of private vehicles increased by 5% in 2023. Deliveries of light commercial vehicles increased by 18%, and those of industrial vehicles by 1.5%.

In 2023, manufacturers' industrial activity was mainly driven by deliveries to European markets. All vehicles combined, deliveries to the EU, EFTA, UK zone increased by 12%. On the other hand, deliveries outside the EU, EFTA, UK zone only increased by 0.5% and are even declining if Turkey and the other eastern countries are not taken into account.

The discrepancy between the two zones is primarily due to deliveries of private vehicles, which increased by 11% to European markets, while they decreased by 3% to other markets. Deliveries of light commercial vehicles are seeing strong growth to all destinations (+20% to European markets, compared with +16% to the rest of the world).

Across the overall light vehicle market, the share of French car manufacturers in Western Europe has reached 29.4% and 24.5% excluding France.

As for industrial vehicles, the market share of Renault Trucks increased to 8.5% in 2023. Deliveries to the European market have increased slightly (+1.7%), compared to +1.2% for the rest of the world.

-16,4% **Volume of vehicles registered in Western Europe compared to 2019**

THE SHARE OF THE STELLANTIS AND RENAULT GROUPS IN GLOBAL VEHICLE PRODUCTION AMOUNTED TO ALMOST 9% IN 2023

	Units	2019	2022	2023	Variation 2023/2022
Penetration of Stellantis (1) and the Renault Group (light vehicles)					
In France	(Percentage)	58.5%	58.1%	55.0%	-3.1 points
In Europe (17 countries) excluding France	(Percentage)	22.1%	24.9%	24.5%	-0.5 points
In Europe (17 countries)	(Percentage)	28.1%	30.3%	29.4%	-0.9 points
Penetration of Renault Trucks (new industrial vehicles)					
In Europe (17 countries)	(Percentage)	8.2%	9.3%	8.5%	-0.8 points
Share of the Stellantis (1) and Renault groups in world production					
Passenger cars	(Percentage)	9.3%	-	-	-
Commercial vehicles	(Percentage)	4.2%	-	-	-
Total	(Percentage)	7.9%	10.0%	8.8%	-1.2 points
French foreign automobile trade					
Exports	(In billions of euros)	51.7	52.8	61.4	+ 16.3%
Imports	(In billions of euros)	66.9	75.2	87.3	+ 16.1%
Balance	(In billions of euros)	-15.2	-22.4	-25.9	-
The weight of the automobile in foreign trade of goods					
Exports	(Percentage)	10.4%	9.0%	10.2%	1.2 points
Imports	(Percentage)	11.6%	9.7%	12.1%	2.4 points
Global data from the Stellantis and Renault groups					
Turnover	(In billions of euros)	130.3	226.0	241.9	+ 7.0%
Investments	(In billions of euros)	5.7	n/a	n/a	-
Workforce	(In thousands of people)	388	381	364	- 4.5%
The workforce in the automotive sector in France					
Automotive industry	(In thousands of people)	232	214	212	- 0.9%
As a share of manufacturing industry	(Percentage)	7%	6%	6%	-
Automotive-induced jobs (including automotive industry)	(In thousands of people)	2,219	2,275	2,350	+ 3.3%
As a share of employed labor force	(Percentage)	8%	8%	8%	-

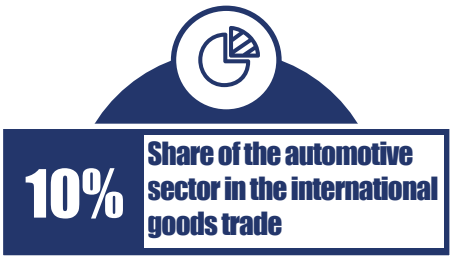
(1) Excluding FCA before 2021.

In France, economic activity slowed down compared to 2022, with GDP growing by only 0.9% in 2023. Road traffic also decreased in 2023, following the recovery recorded in 2021 and 2022. Traffic volumes expressed in billions of vehicle kilometres recorded a drop of 1.6% in 2023.

The automotive market is nevertheless recovering, thanks to the resumption of production following the end of semi-conductor shortages and the recovery of household consumption. Household purchases of new vehicles increased by 18.6% in volume and 23.6% in value due to inflation that remains high. Across all new vehicles combined (private vehicles and light and heavy commercial vehicles), registrations increased by 15% in 2023.

In France, the market share of Renault and Stellantis for light vehicles amounted to 55% in 2023, down 3 percentage points on 2022, although local production increased by 9%.

France's total vehicle exports also increased by 16% in 2023, amounting to 61.4 billion euros, 58.3 billion euros of which was in the industrial sector (excluding pre-owned vehicles). This represents 10.2% of total exports. As for imports, these reached a record level of 87.3 billion euros, up by 16.1% and representing 12.1% of total imports, which further upsets the balance for the French automotive sector.



GLOBAL VEHICLE PRODUCTION

In 2023, the easing of shortages of electronic components, logistical problems and better adaptation to the geopolitical context led to a resumption of production in Europe. At the same time, the improvement in the health situation and the easing of related measures also boosted Asian production. Worldwide, production was more dynamic in 2023, up 10% after +6% in 2022. At 93.5 million units, production volumes were slightly higher than in 2019.

In thousands	2022	2023	Variation 2023/2022	Base level 100 = 2019
EUROPE	**16,230**	**18,122**	**11.7**	**84**
Western Europe	**10,096**	**11,166**	**10.6**	**82**
Germany	3,678	4,109	11.7	83
Belgium	285	332	16.3	116
Spain	2,219	2,451	10.4	87
France	**1,383**	**1,505**	**8.8**	**69**
Italy	796	880	10.5	96
Portugal	322	318	-1.3	92
United Kingdom	877	1,025	17.0	74
Sweden*	239	277	15.8	99
Central and Eastern Europe and Turkey	**6,134**	**6,956**	**13.4**	**87**
CEEC EU members	3,710	4,179	12.6	95
Russia	609	730	19.8	42
Turkey	1,353	1,468	8.6	100
AMERICA	**17,754**	**19,137**	**7.8**	**95**
USMCA	**14,795**	**16,167**	**9.3**	**96**
Canada	1,233	1,553	25.9	81
Mexico	3,509	4,002	14.0	100
USA	10,053	10,612	5.6	97
South America	**2,958**	**2,970**	**0.4**	**89**
Brazil	2,370	2,325	-1.9	79
ASIA-OCEANIA	**50,021**	**55,116**	**10.2**	**112**
ASEAN (1)	4,381	4,300	-1.8	104
China	27,021	30,161	11.6	117
South Korea	3,757	4,244	13.0	107
India	5,457	5,852	7.2	129
Japan	7,836	8,997	14.8	93
AFRICA	**1,024**	**1,172**	**14.5**	**105**
TOTAL	**85,029**	**93,547**	**10.0**	**101**

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

In Europe, production increased by 11.7%, but failed to return to its pre-crisis level (-16% compared to 2019). It grew by more than 10% in most of the major producing countries, except for France, which saw less dynamic production (+8.8%), and Portugal, which saw its production fall in 2023 (-1.3%), after rising in 2022.

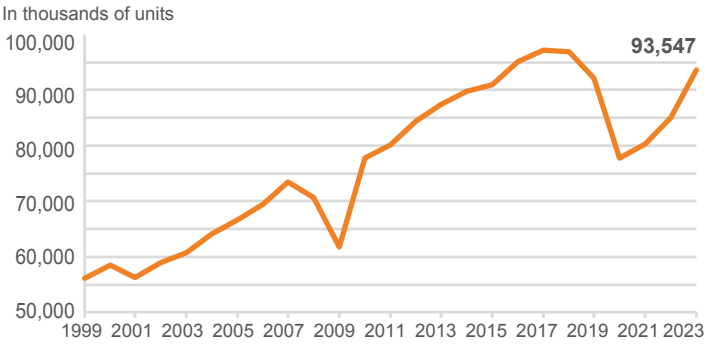
In the Americas, automotive production rose by 7.8%, but remains 5% down on 2019. Production in the ACEUM zone (United States, Canada, Mexico) was also dynamic (+9.3%), while in South America it stagnated at 0.4%.

In Asia, production, which now accounts for 58% of global output, increased by 10.2% in 2023 and is around 12% higher than in 2019. China accounts for more than half of the volumes produced in this zone, representing a third of global production. In 2023, Chinese production will increase by 11.6%, contributing 3.6 points to global production growth. Japan, the zone's second-largest producer, sees its automobile production grow by 15%, but remains below its 2019 level. Indian production, which had risen sharply in 2022 (+24%), will grow by just 7% in 2023. Since 2019, however, it will have grown by 29%.

Finally, in Africa, the number of vehicles produced rose by 14.5% in 2023, surpassing its 2019 level, but still accounting for only 1.1 million vehicles, barely 1.3% of global production.

+10% **Increase in global vehicle production in 2023**

EVOLUTION OF WORLD VEHICLE PRODUCTION SINCE 1999



In Europe, production increases by 11.7% in 2023, reaching 18.1 million vehicles, or 20% of the total. Western Europe, which produced more than 11 million vehicles in 2023, accounts for two-thirds of the volumes produced in Europe. It is led by Germany with 4.1 million vehicles produced, up 11.7% in 2023, followed by Spain with 2.4 million units produced (+10.4% in 2023). France, with 1.5 million vehicles, is in third position and represents 1.6% of world production. The United Kingdom, which continued to lose volume in 2022 (877,000 units), recovered in 2023 (+17%) and exceeded one million vehicles produced.

On the American continent, production represents 19.1 million vehicles in 2023 (20% of the total), up 7.8% compared with +9.7% in 2022. Production growth in the ACEUM zone remains dynamic (+9.3% after +9.9% in 2022) with 16.1 million vehicles. It is even accelerating in Canada and Mexico but slowing down in the United States (10.6 million units), from +9.8% in 2022 to +5.4% in 2023. However, it is in South America that the slowdown is most marked, with growth falling from 8.6% in 2022 to just 0.4% in 2023. This stagnation is largely due to the weight of Brazil (80% of the volumes produced in the zone), which sees its production fall by 1.9% in 2023.

Asia-Oceania produced 55 million vehicles in 2023, up 10.2%, compared with 7% in 2022. China, which remains the heavyweight in this zone, produced 30 million vehicles thanks to the recovery of world trade and the end of zero Covid policies. Japanese production, which had been stagnating since 2020, rebounded by almost 15% in 2023, with almost 9 million vehicles produced, but this is not enough to return to the 2019 level. South Korea, on the other hand, exceeded its pre-crisis level with 4.2 million vehicles produced, up 13% in 2023. India, despite lower growth than last year, reached a record production volume of 5.8 million vehicles, up 1.8%, and ranked 4th in the world. Thailand and Indonesia, which are the largest producers in ASEAN, with 1.8 and 1.4 million vehicles produced respectively, saw their production decline in 2023.

GLOBAL VEHICLE PRODUCTION

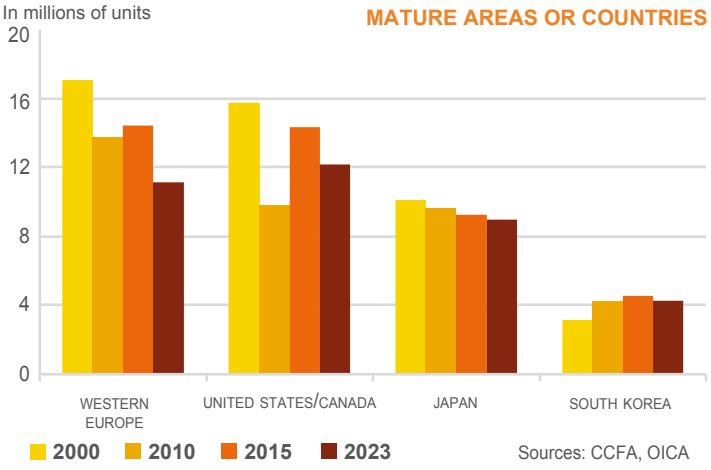
Since the early 2000s, global vehicle production has undergone contrasting phases. Between 2000 and 2010, it increased by 20 million vehicles, mainly thanks to the development of the automotive industry in emerging countries such as Central and Eastern Europe and China. The latter, by multiplying its production tenfold, gained 16 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, from 46 million to 38 million vehicles. By 2010, the mature countries (Western Europe, Canada/USA, Japan and South Korea) accounted for only half of global production, compared with 80% ten years earlier.

Then, between 2010 and 2018, automotive production became dynamic again in all zones, gaining 20 million vehicles. While mature countries produced 4 million more vehicles during this period, emerging countries increased their output by 15 million vehicles. China, whose production increased by 10 million units between 2010 and 2018, accounted for 30% of global production in 2018, compared with 3.5% in 2000.

In 2019, the slowdown in trade and growth weighs on automotive production, which declines for the first time. In 2020, the health crisis will return global production to its 2010 level of 78 million vehicles. In two years, production will have fallen by 20 million units, half of which will be produced in developed and emerging countries. In 2021 and 2022, the semiconductor crisis has prevented any real rebound in global production, particularly in mature regions, which have been particularly hard hit by supply and logistics problems, while emerging countries are holding out and continuing to gain market share (61% of global production).

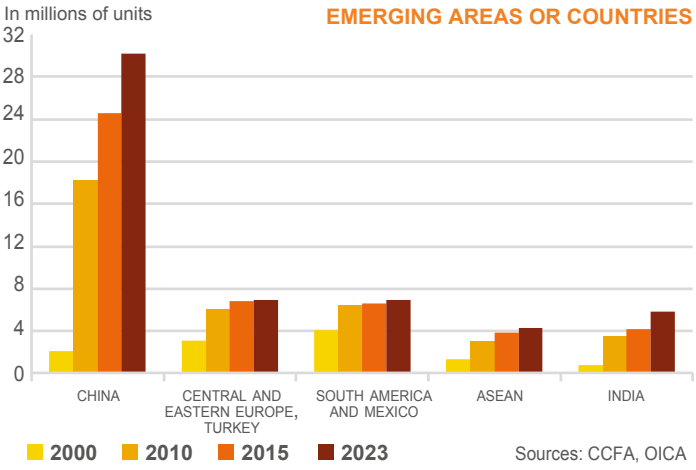
By 2023, global production will have regained 8.5 million units, returning to its 2016 level. This gain is divided between zones mature (+3.6 million units) and emerging zones (+4.9 million), with production recovering in Europe and China, but weakening in several emerging countries in ASEAN and South America.

MATURE AREAS OR COUNTRIES



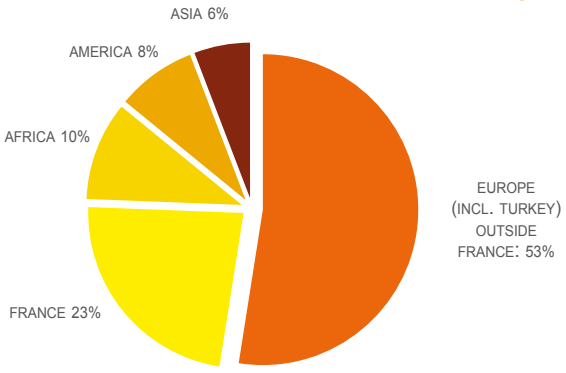
Sources: CCFA, OICA

EMERGING AREAS OR COUNTRIES



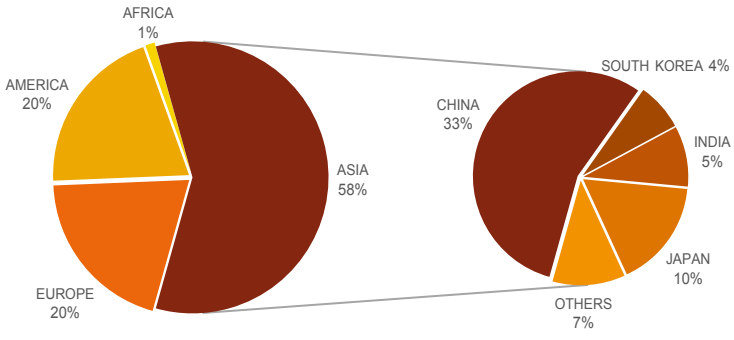
Sources: CCFA, OICA

GLOBAL PRODUCTION OF STELLANTIS (EXCLUDING FCA) AND RENAULT IN 2023



Source: CCFA

WORLD PRODUCTION IN 2023



Source: OICA

Production by the groups Renault and Stellantis (excluding FCA) is adapting to the changing geography of the global automotive industry and is spread across all five continents. However, 75% of production is still carried out on the European continent, including France, which accounts for almost a quarter of global output. Africa accounts for 10% of both groups' production (excluding FCA), while the Americas and Asia will account for 8% and 6% respectively of their output in 2023.

These figures reflect the ongoing internationalisation efforts of our manufacturers over many years. Over the long term, this development has seen successes (Turkey, Morocco, South America) and areas yet to be confirmed (India). Historically, we have also had to contend with intense local competition (China) and geopolitical events (Iran, Russia), which have led to significant increases and decreases in production.

61% **Share of emerging countries and regions in global vehicle production**

WORLD RANKING OF CAR MANUFACTURERS

Global production rose by 12% in 2023, to 93 million vehicles. The world's top five manufacturers produced almost half of this total (44%), a figure that has remained relatively stable since 2016. To boost their competitiveness, manufacturers are increasing the number of cooperative ventures and partnerships. PSA merged with FCA in 2021 to create Stellantis, which moves up to fourth place in 2023 with 6.4 million vehicles produced. Renault is in fifteenth place, thanks to multiple partnerships (Nissan, Mitsubishi, Mercedes, Renault Trucks, Geely, etc.).

In 2023, the ranking of the world's top three manufacturers remains the same as it has been for the last three years. The top three vehicle manufacturers have managed to maintain their positions on the podium despite differing performances in 2023. The Toyota group enjoyed the strongest momentum (+8.6%) and remains at the top of the podium with 11.5 million vehicles produced. It is followed by the Volkswagen group with 9.3 million vehicles and growth of 6.8%. Hyundai-Kia comes third with 7 million units produced. In fourth place, Stellantis, whose production rose by 6.5%, moves ahead of GM, which sees its production fall by 3.4% in 2023.

In the top twelve, there are now three Chinese manufacturers, compared with just one in 2016. Similarly, the top seven manufacturers from emerging countries in 2023 will account for 16% of global production, up from 9% in 2016.

63% **Weight of the top twenty manufacturers in global vehicle production in 2023**

► GLOBAL VEHICLE PRODUCTION IN 2023 (1)
(IN THOUSANDS)

Rank	Group	2022	2023	% Variation
1	TOYOTA	10,611	11,518	+8.6
2	VOLKSWAGEN	8,717	9,309	+6.8
3	HYUNDAI-KIA	6,850	7,050	+2.9
4	**STELLANTIS (FCA-PSA)**	**6,003**	**6,393**	**+6.5**
5	GM	6,094	5,886	-3.4
6	FORD	4,231	4,413	+4.3
7	HONDA	3,870	4,188	+8.2
8	NISSAN	3,251	3,444	+5.9
9	SUZUKI	3,172	3,225	+1.7
10	BYD	1,882	3,045	+61.8
11	SAIC	2,812	2,805	-0.2
12	GEELY	2,300	2,790	+21.3
13	BMW	2,400	2,554	+6.4
14	MERCEDES-BENZ GROUP	2,505	2,503	-0.05
15	**RENAULT**	**2,426**	**2,391**	**-1.4**
16	CHANGAN	1,850	2,138	+15.6
17	CHERY	1,218	1,881	+54.5
18	TESLA	1,370	1,846	+34.8
19	TATA	1,087	1,336	+22.9
20	GREAT WALL	1,102	1,265	+14.8
21	MAZDA	1,092	1,254	+14.8
22	BAIC	947	1,042	+10.0
23	DONGFENG MOTOR	1,098	1,041	-5.2
24	MITSUBISHI	1,012	1,024	+1.1
25	SUBARU	849	959	+13.0
26	GAC	669	924	+38.1
27	ISUZU	721	771	+6.9
28	FAW	537	721	+34.2
29	ANHUI JAC AUTOMOTIVE	349	592	+69.6
30	IRAN KHODRO	500	559	+11.7
31	MAHINDRA	456	529	+16.1
32	DAIMLER TRUCK	520	526	+1.1
33	SAIPA	371	414	+11.7
34	CHINA NATIONAL HEAVY DUTY TRUCK	482	330	-31.7
35	VOLVO (incl. **RENAULT TRUCKS**)	**238**	**252**	**+5.7**
36	PACCAR	186	204	+9.8
37	SHANNXI	109	159	+46.0

Note: The production of Chinese manufacturers does not include that of joint ventures that assemble vehicles of other brands.
Vehicles include passenger cars, light commercial vehicles, industrial vehicles and coaches and buses. Double counting may exist between manufacturers.
Sources: OICA, annual reports, CCFA estimates July 2024

In 2023, the upturn in global production has benefited many players, but results remain highly contrasted from one group to another. Tesla and Chinese groups such as BYD, Geely and Chery continued to enjoy the strongest growth.

The Toyota Group remained at the top of the ranking in 2023, even widening the gap with the Volkswagen Group in second place. With production up by more than 8.6%, the group produced over 11.5 million vehicles, 2.2 million more than its rival in second place.

The Hyundai-Kia group maintained the third place ranking it achieved in 2020, with production growth of 2.9%. Japanese manufacturers also reported higher output, thanks in particular to a rebound in the Asian (China and Japan) and American markets. Honda and Nissan maintained their seventh and eighth places, thanks to sustained growth (+8.2% and +5.9% respectively), while Suzuki slowed down (+1.7%) after two very dynamic years.

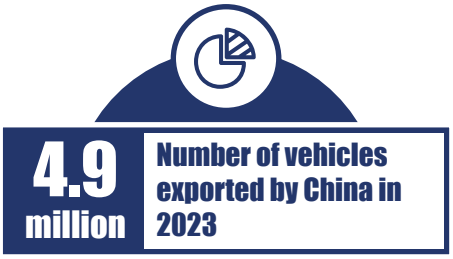
Among the European groups, Stellantis, which brings together fourteen brands, regains the fourth place it lost last year, thanks to a 6.5% increase in production in 2023. The Renault group, on the other hand, recorded a drop in production (-1.4%) for the second year running. Among German manufacturers, the Volkswagen Group performed well, with production up by 6.8% in 2023, as did BMW (+6.4%). Group production Mercedes-Benz is stable.

American manufacturers face contrasting situations in 2023. General Motors, which had increased its production volumes in 2022, declines by 3.4% in 2023. Ford's production, on the other hand, remains dynamic, rising by 4.3%. As for Tesla, despite a slowdown in growth, its production is still up by 35% in 2023, exceeding 1.8 million vehicles.

Manufacturers in emerging markets (China, India) continued to benefit from more favourable demand and supply conditions in 2023. Indian manufacturers Tata continues to enjoy strong growth (+23%) thanks to the success of its Jaguar Land Rover brand and the dynamism of the Indian market (+7.5% in 2023). Among Chinese manufacturers, BYD takes tenth place with 3 million vehicles produced, up 62% on 2022. SAIC production stagnates at 2.8 million vehicles. Geely follows close behind with 2.79 million vehicles produced, an increase of 21%. With production growth of over 15%, Changan topped the two-million mark. Finally, the groups Chery and Great Wall also recorded double-digit growth.

Among heavy-duty vehicle manufacturers, the Volvo Group (including Renault Trucks) saw its production increase by 5.7% in 2023, finally exceeding its pre-crisis level with 252,000 vehicles produced.

PRODUCTION AND TRADE AMONG THE WORLD'S LEADING AUTOMOTIVE REGIONS



China, which has become the world's leading producer since 2010, mainly produces to satisfy its domestic market. However, since 2019, an increasing proportion of its vehicle production has been exported. Vehicle exports as a proportion of production were just 4% in 2019. It rose to 8% in 2021, 12% in 2022 and reaches 16% in 2023, i.e. almost 5 million vehicles exported by China. Imports, on the other hand, have fallen and now represent just 3% of production, making China a structurally very surplus country in terms of vehicle trade, like other Asian countries such as Japan and South Korea.

North America (USA, Canada, Mexico) is now the world's second largest vehicle-producing region, just ahead of the European Union. Most of this production is destined for the local market, with exports hovering around 15% of the zone's output. This market is also fed by a significant flow of imports (25% of production).

The European Union, excluding the United Kingdom since 2020, is now in third place. It benefits from a strong domestic market, fuelled by imports (30% of production in 2023), but also by vehicle exports from outside its zone (46% of production).

In Japan, half of production is exported (49% in 2023), while imports relative to local production remain low (4% in 2023).

► THE EVOLUTION OF PRODUCTION AND TRADE IN THE FOUR GLOBAL AUTOMOBILE HUBS

	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
2019	18,000	105	16,823	138	9,684	101	25,721	141
2022	12,932	76	14,795	122	7,835	81	27,021	148
2023	14,323	84	16,167	133	8,997	93	30,161	165
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
2019	4,622	26%	5,041	30%	361	4%	1,050	4%
2022	3,662	28%	3,871	26%	313	4%	878	3%
2023	4,240	30%	4,055	25%	358	4%	799	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
2019	6,982	39%	2,484	15%	4,818	50%	1,040	4%
2022	6,015	47%	2,158	15%	3,813	49%	3,111	12%
2023	6,634	46%	2,374	15%	4,423	49%	4,910	16%

(1) The number of countries included in the "European Union" group is equal to the number of member countries of the year.
(2) Mexico is included from 2009.
(3) Intra-Community trade is not included.
Sources: OICA, Eurostat, CCFA since 1991, Ward's from 1999, JAMA

Since 2000, the development of the automotive industry has been uneven across the three major automotive hubs. Over the past two decades, China has established itself as a new major production hub, becoming the world's leading vehicle producer in 2010.

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 regions, production slowed in 2019 and collapsed in 2020 with the health crisis. In 2022 and 2023, European production picks up (+6%, then +11%) and trade becomes more dynamic again. Exports of vehicles from the European Union increase by around 10% in 2023, but imports grow even more strongly (+16%).

In North America, production peaked in 2016 and then declined until 2020. It rebounds in 2022 and 2023 (by around 9% each year) but remains 10% below the 2016 peak. Exports outside the zone represent around 15% of production, while imports now account for 25%. This represents 5 points less than in 2019, due to an increase in flows within the zone, notably 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), boosted 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% below that observed in 2019. But in 2023, production grows again by 15%, at the same pace as vehicle imports and exports.

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 2023, Chinese production rose by 17%, but exports increased almost fivefold, while Chinese imports fell by 24%. It was in 2023 in particular that the trend was most marked. In one year, production rose by 12%, exports by 58% and imports by 9%. Chinese exports have now overtaken those of Japan.

WORLD VEHICLE MARKETS

In 2023, the global automotive market grew by 11.9%, after a period marked first by the consequences of the health crisis (sanitary restrictions, shortages, logistical problems), then by those of the war in Ukraine (inflation, economic uncertainties). For the first time in three years, the market returned to pre-crisis volumes, at 92.7 million units.

However, the situation differs from zone to zone. The European and American automotive markets, which have been hardest hit over the past three years, have not recovered their 2019 volumes. Despite double-digit growth in 2023, they remain some 10-15% behind the latter. In Asia, registrations rose by 10.2% in 2023, and almost all countries benefited from this growth.

In Europe, the Western European markets and those of the Central and Eastern European EU member states will see double-digit growth but will still lag behind the volumes registered in 2019. Other countries, including Turkey, Russia and the former CIS countries, which had been particularly hard hit by the war in Ukraine, rebound strongly in 2023. The Turkish market increases by 55% in 2023 and now exceeds 1.2 million units, triple its 2019 level. The Russian market also grew strongly in 2023 (+63%), without returning to its pre-war levels.

On the American continent, the United States, which accounts for 2/3 of registered volumes, recorded growth of 12.5%, benefiting the entire zone, while the markets of Central and South America grew by just 4.4%. Within ACEUM (formerly NAFTA), the Mexican market is also growing strongly (+24.6%).

In Asia, sales rebounded in all countries except Indonesia, the largest market in ASEAN. However, this recovery has not enabled all countries to return to their pre-crisis volumes. The Japanese market remains 8% down in 2019, and the Korean market 2.5% down. India is the country with the strongest market growth compared to the pre-crisis period, with an increase of 33%. Finally, the Chinese market will grow by 12% in 2023 and 16.7% compared to 2019.

In Africa, registrations fell by 2.4% in 2023 to 1.1 million vehicles. South Africa, the continent's leading market, has returned to its 2019 level after two years of strong growth, and will grow by 3.4% in 2023. The Moroccan market is stagnating, while the Egyptian market has fallen by 50%.

China, the world's largest market since 2009, now accounts for 32.5% of the total, followed by the USA (17.3%). India takes 3rd place with 5.5% of the market, ahead of Japan (5.2%). These top four global markets account for over 60% of the total.

China: 1/3 of the world market

	Passenger cars		Commercial vehicles		Total			Variation 2023/2022	Variation 2023/2019
	2022	2023	2022	2023	2022	2023			
	thousands	thousands	thousands	thousands	thousands	thousands	%	%	%
EUROPE	**12,637**	**14,999**	**2,442**	**2,900**	**15,080**	**17,899**	**19.3**	**+18.7**	**-14.5**
Western Europe	10,163	11,577	675	880	10,838	12,457	13.4	+14.9	-16.4
Central and Eastern Europe (EU member countries)	1,112	1,247	231	259	1,343	1,505	1.6	+12.1	-13.3
Other Central and Eastern European countries (Turkey, Russia, CIS)	1,344	2,153	441	618	1,784	2,770	3.0	+55.3	+10.5
AMERICA	**6,551**	**6,953**	**14,326**	**16,294**	**20,877**	**23,247**	**25.1**	**+11.4**	**-8.4**
CUSMA (1)	3,604	3,977	13,324	15,211	16,928	19,188	20.7	+13.4	-7.9
UNITED STATES	2,859	3,117	11,372	12,893	14,230	16,009	17.3	+12.5	-8.5
Central and South America	2,947	2,976	1,002	1,083	3,949	4,060	4.4	+2.8	-11.1
ASIA-OCEANIA	**38,666**	**42,573**	**7,173**	**7,956**	**45,839**	**50,529**	**54.5**	**+10.2**	**+13.4**
China	23,563	26,063	3,300	4,031	26,864	30,094	32.5	+12.0	+16.7
South Korea	1,420	1,489	263	260	1,684	1,750	1.9	+3.9	-2.5
India	3,792	4,102	933	978	4,726	5,080	5.5	+7.5	+33.1
Japan	3,448	3,993	753	786	4,201	4,779	5.2	+13.8	-8.0
ASEAN (2)	2,232	2,409	1,037	858	3,269	3,267	3.5	-0.1	-6.0
Other Asia-Oceania	4,210	4,517	886	1,042	5,095	5,559	6.0	+9.1	+24.5
AFRICA	**790**	**748**	**286**	**302**	**1,075**	**1,050**	**1.1**	**-2.4**	**-12.5**
TOTAL	**58,645**	**65,272**	**24,226**	**27,452**	**82,871**	**92,725**	**100.0**	**+11.9**	**+0.7**
VARIATION 2023/2022	**11.3%**		**13.3%**						

(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 shifted from the mature Western America Europe/North zone (56% of the total in 2005 to 34% in 2023) to Asia (from 31% of the total to 55%). Recent crises have not altered the structure of the global market. The weight of mature countries continues to decline, to the benefit of the BRICS and emerging countries.

In the United States, the market recovered by 11.5% to 17.3 million vehicles, compared with 17.5 million in 2019. In Canada, the market rebounded by 12.9% to 1.7 million units, followed by Mexico, which grew for the second year running to a record 1.4 million units. In Central and South America, Brazil, which will account for 57% of sales in this zone by 2023, saw its market rebound to 2.3 million units, still below pre-crisis levels.

In Western Europe, most countries rebounded in 2023. The German market, which accounts for a quarter of the zone's volumes, is back above the 3-million-unit mark, thanks to growth of 8%. The UK and France are both back to around 2.2 million units, thanks to growth of around 15%, but the UK market is larger than the French market in terms of passenger cars alone (1.9 vs. 1.7 million units). Spain and Italy also posted strong growth of +17.6% and +19.2% respectively. Finally, the Norwegian automotive market, which had been buoyed by the development of electric vehicles, is the only European country whose volumes fell in 2023 (-21.9%).

Automotive markets in the EU member countries of Central and Eastern Europe are also set to rebound in 2023 (+12.1%). Poland, the zone's largest market with 38% of all registrations, grew by 11.4% to 576,000 units.

In the Asia-Oceania region, the market outside China is set to grow by 7.7% in 2023 to over 20.4 million vehicles. The Indian market, which overtook Japan two years ago, grew by 7.5% in 2023 to 5 million units. The Japanese market, although growing by 13.8%, remains in 3rd place with 4.8 million units. Finally, South Korea is in 4th place with 1.7 million units and growth of 3.9%.

VEHICLES IN USE IN THE WORLD

In 2020, the global vehicle fleet (passenger cars and commercial vehicles) will total 1.6 billion units, 75% of which will be passenger cars. Asia-Oceania now accounts for 40% of the fleet, compared with 34% in 2015, while the weight of Europe and America has fallen, from 31% to 27% and 32% to 28% respectively. Africa remains stable at just 4%.

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

Fleets are virtually stable in the mature markets of developed countries (increases generally ranging from 0% to 2%). They are growing strongly in emerging markets (between +3% and +20%).

The US which was the world's largest in 2015 with 264 million vehicles, has now been overtaken by China, which will have 318 million vehicles in 2020, compared with 289 million for the USA. The Japanese fleet retains fleet, 3rd place with 77 million units, but is stagnant or even slightly down on 2015. With 45.4 million vehicles, France remains in eighth place worldwide, behind Russia (4th), Germany, Brazil and India.

Worldwide vehicle density will average 209 vehicles per 1,000 inhabitants in 2020 (+46% on 2005). However, it varies from 49 vehicles in Africa to 722 in the ACEUM zone (United States, Canada, Mexico), via 107 in Asia (excluding Japan and South Korea), 179 for Central and South America and over 550 for the Union European and the Japan-South Korea zone. Europe as density of a whole has a 517.

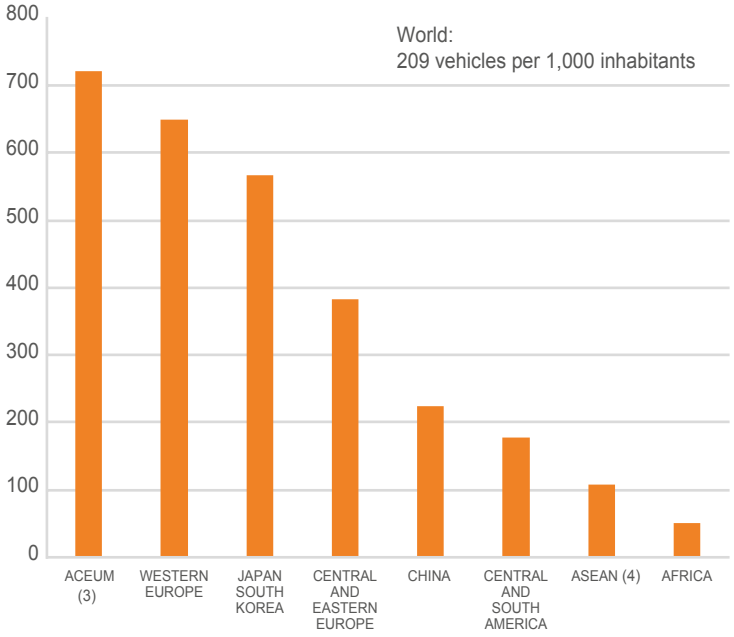
North Africa (Algeria, Egypt, Libya, Morocco and Tunisia), which is close to Europe, has benefited from strong growth in the installed base, averaging 6% a year since 2005. As a result, the number of units has risen from 10 to 23 million by 2020.

	TOTAL		Variation CAGR	Share of global fleet	Share of 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%
United States	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) EU-12, Russia, Turkey and other Europe.
(3) CUSMA: Canada, Mexico, United States.
(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 zones, whose installed base is growing at between 1% and 2% a year, now less than account for 50% of the world's installed base and 15% of the world's population. Since 2005, they have lost around 22 points to emerging zones, whose installed base has grown by around 10% a year.

In Europe, which accounts for 27% of the global fleet, the number of vehicles is growing faster in the East than in the West, which is already well equipped (see page 19). The number of vehicles per 1,000 inhabitants is 651 in Western Europe, compared with 381 in Central and Eastern Europe.

In the Americas, the Canada, United States and Mexico zone (23% of the global fleet) is a mature market with a high car ownership rate (722 vehicles per 1,000 inhabitants), especially in the United States, where it reaches 860. Mexico is experiencing the highest fleet growth (+4% between 2010 and 2020). On the other hand, Central and South America is an emerging zone where the number of vehicles on the road has grown relatively slowly (2% on average between 2015 and 2020). It will account for just 6% of the global installed base in 2020, with a density of 179, ranging from 113 in Colombia to 311 in Argentina.

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

WORLD TRADE IN AUTOMOTIVE PRODUCTS

In 2023, global exports of goods amounted to $23,813 billion, down 4% on 2022. Exports of automotive products, meanwhile, rose by 18.6% to a record $1,878 billion, thanks in part to reduced shortages. In 2023, automotive products accounted for 12.1% of total manufactured exports and 7.9% of all exported goods, a share similar to that seen in 2019.

In addition to the macro-economic context, world trade 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, such as the Inflation Reduction Act signed in August 2022 in the USA, which subsidises locally assembled electric vehicles. In the major markets of the European Union and ACEUM (Mexico, United States, Canada), the share of intra-regional trade in global trade is particularly high (around 75%). In contrast, in Asia-Oceania, it barely reaches 30%, with markets that are not very open to imported products (Japan, South Korea), but which are very outward-looking for exports.

Global trade is also influenced by exchange rate trends. In 2023, the dollar depreciated slightly against the euro due to the different monetary policies of the two zones. But it continued to appreciate against most other developed-country currencies, notably the Japanese yen and Chinese yuan.

Between 2005 and 2018, trade balances in automotive products showed contrasting trends by country or zone. Mexico, South Korea, Japan and the European Union saw their trade surpluses increase. Conversely, the deficit balances of the United States and China deteriorated until 2018, then stabilised in 2019. China, which has become the world's leading automotive market, increased its trade deficit sixfold between 2005 and 2019. Canada's trade balance, which was positive in 2005, turned negative from 2007 onwards, due in particular to Mexico's growing role in NAFTA trade. In 2020, most zones or countries saw their trade balances deteriorate, except for the USA and Canada, which saw their trade deficits shrink.

Since then, with the upturn in world trade, the automotive trade balance has improved in most countries, except for the United States, whose trade deficit has been growing since 2021, reaching $226 billion in 2023.

In 2023, the European Union will remain the world's leading exporter of automotive products, with $833 billion (45% of global exports). China, with €170 billion in automotive exports, is now in second place (+37% on 2022), ahead of Mexico ($158 billion), Japan ($157 billion) and the USA ($156 billion).

In terms of imports, the 27-nation European Union will import $684 billion worth of automotive products in 2023, 78% of which will come from its own zone. The United States is the leading importer of automotive products, with $383 billion. With Canada and Mexico, the zone imports $542 billion, 40% of which comes from outside the zone. The ACEUM agreement signed in 2020 should boost imports from Mexico as the United States distances itself from China and seeks to relocate production closer to home. In 2023, according to the Mexican Automobile Federation (AMIA), 9 out of light vehicles 10 manufactured in Mexico will be exported, of which 77% to the United States and 6.6% to Canada.

The US trade balance in automotive products is structurally in deficit, due to the dynamism of US consumption and the low penetration of US cars outside the US, particularly in Europe. Imports are twice as high as exports, and this gap will widen in 2023, with a US automotive deficit of $226 billion in 2023.

Japan, on the other hand, has a structurally positive automotive balance ($133 billion), reflecting the low dynamism and openness of its domestic market. Their exports are six times greater than their imports, but over the last ten years, the surplus has not increased. Similarly, South Korea's automotive surplus (€71 billion) is still growing, but only slightly.

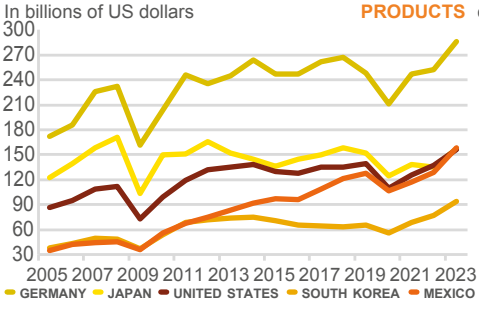
Mexico's automotive surplus ($90 billion) is growing, thanks to an increase in exports which have doubled in ten years. Lastly, China's automotive balance ($98 billion) has grown the most, since it was negative before 2021 and has been multiplied by 31 in 2 years, thanks to a rise in exports (+37%), coupled with a fall in imports (-13%).

► EXPORTS (FOB) / IMPORTS (CIF) OF THE MAJOR HUBS
(In billions of US dollars)

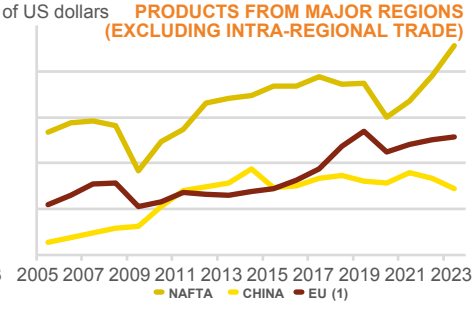
Areas	World		
Countries	EXP.	IMP.	Balance
UNITED STATES			
2010	99.7	189.8	-90.0
2019	139.3	317.7	-178.4
2022	137.7	327.4	-189.7
2023	156.1	382.6	-226.5
MEXICO			
2010	55.6	29.4	26.2
2019	127.9	51.1	76.7
2022	129.0	56.1	72.9
2023	158.4	67.8	90.6
CANADA			
2010	50.1	59.6	-9.5
2019	60.8	75.8	-15.1
2022	50.2	83.1	-32.9
2023	63.4	72.4	-9.0
EUROPEAN UNION (1)			
2010	546.4	426.9	119.4
2019	701.4	572.1	129.3
2022	700.1	554.6	145.5
2023	832.9	684.0	148.9
JAPAN			
2010	149.5	14.2	135.3
2019	152.4	23.5	128.9
2022	135.2	21.0	114.3
2023	157.1	24.1	133.0
SOUTH KOREA			
2010	54.5	8.0	46.5
2019	65.2	16.8	48.3
2022	77.1	21.0	56.0
2023	93.7	22.2	71.5
CHINA (EXCLUDING HONG KONG)			
2010	28.0	53.0	-25.0
2019	59.3	80.0	-20.7
2022	124.2	83.1	41.1
2023	170.1	72.4	97.7

€1,869 billion — **Global exports of automotive products in 2023**

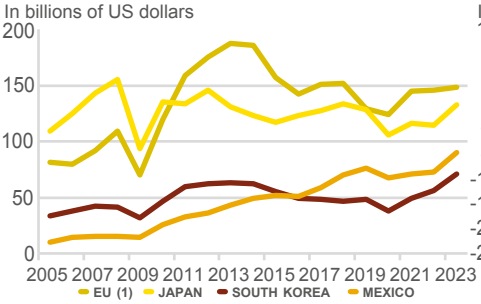
MAJOR EXPORTING COUNTRIES OF AUTOMOTIVE PRODUCTS
In billions of US dollars



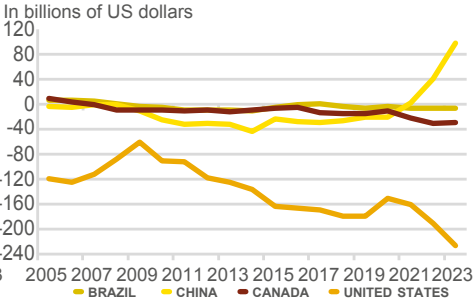
IMPORTS OF AUTOMOTIVE PRODUCTS FROM MAJOR REGIONS (EXCLUDING INTRA-REGIONAL TRADE)
In billions of US dollars



EXCESS BALANCES IN AUTOMOTIVE PRODUCTS
In billions of US dollars



DEFICIT BALANCES IN AUTOMOTIVE PRODUCTS
In billions of US dollars



(1) For comparisons, 15 countries are included 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

In 2023, the European Union will remain the world's leading exporter of automotive products, with $833 billion, or 45% of global exports. Germany, with $286 billion, remains the leading exporter of automotive products in Europe, with 34% of European exports, but also in the world, with 15% of global exports. France accounted for 3.2% of global automotive exports in 2023 ($60 billion), compared with 7.6% in 2004.

Over of from the 27-member European Union are 60% exports destined for the EU. Most automotive exports outside the EU come from Germany, which accounts for almost half of these non-EU exports (49% in 2023), ahead of Italy (6.7%), Spain (6.5%), Belgium and France (5.5%). The six new entrants (Hungary, Poland, Czech Republic, Romania, Slovakia and Slovenia) now account for 14% of these non-EU exports, up from 10% in 2018.

The main export destinations for European automotive products outside the EU 27 are the USA (19% of non-EU exports), the UK (19%), China (11%) and Turkey (8%). EU exports to China are on the decline, however. They were 16% in 2021.

In terms of imports, the 27-nation European Union will import 684 billion automotive products in 2023, 78% of which will come from within the EU. Imports from non-EU countries come from China (19% of non-EU), Turkey (14%), the UK (13%) and the USA (9%). China's weight in imports is growing, accounting for 8% of non-EU imports in 2019.

The EU's automotive balance is structurally positive and increased with the exit of the UK from the EU, whose automotive balance was in deficit. it Since then, has remained stable at around $149 billion. Imports, however, will outpace exports by 2023.

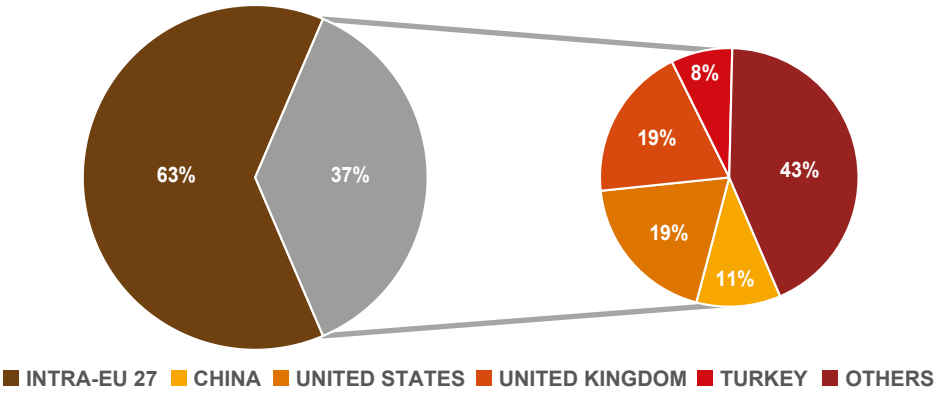
3% France's share of world exports of automotive industry products in 2023

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

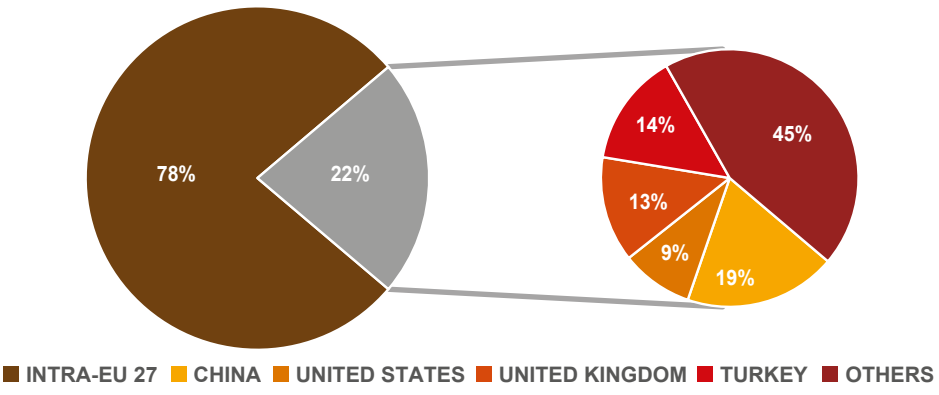
	Exports (FOB) / Imports (CIF) of countries		
Country	**EXP.**	**IMP.**	**Balance**
GERMANY			
2010	203.2	85.0	**118.2**
2019	247.6	137.3	**110.3**
2022	252.7	133.2	**119.5**
2023	285.9	156.5	**129.4**
FRANCE			
2010	51.1	54.9	**-3.8**
2019	55.3	70.4	**-15.1**
2022	50.0	68.2	**-18.2**
2023	60.5	82.4	**-22.0**
SPAIN			
2010	44.8	31.6	**13.1**
2019	56.8	46.8	**10.0**
2022	53.3	42.8	**10.6**
2023	67.6	52.8	**14.8**
ITALY			
2010	29.8	40.3	**-10.5**
2019	40.0	47.0	**-7.0**
2022	41.3	42.8	**-1.5**
2023	48.9	57.2	**-8.3**
UNITED KINGDOM			
2010	38.8	52.6	**-13.9**
2019	51.8	73.5	**-21.7**
2022	41.0	70.7	**-29.7**
2023	50.6	88.2	**-37.6**

(1) For comparisons, 15 countries are included 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

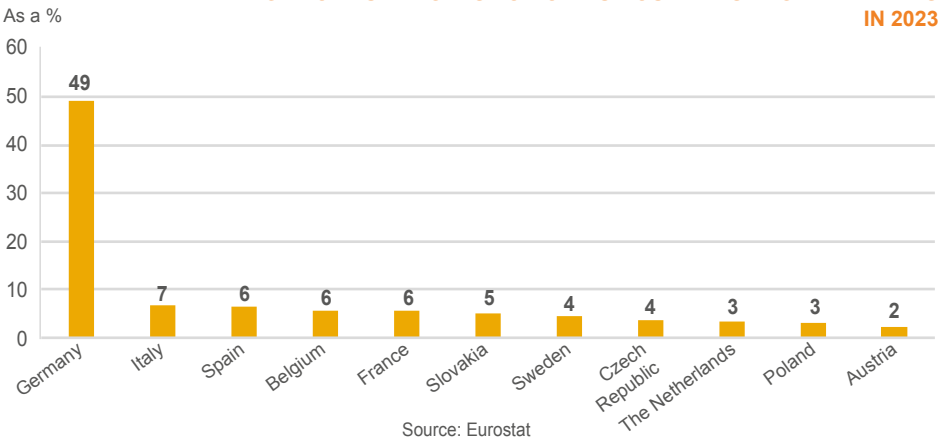
DESTINATION OF EU 27 AUTOMOTIVE EXPORTS IN 2023



ORIGIN OF EU 27 AUTOMOTIVE PRODUCT IMPORTS IN 2023



WEIGHT OF EU EXPORTS TO NON-EU COUNTRIES - ROAD VEHICLES IN 2023



Source: Eurostat

NEW PASSENGER CAR REGISTRATIONS BY COUNTRY

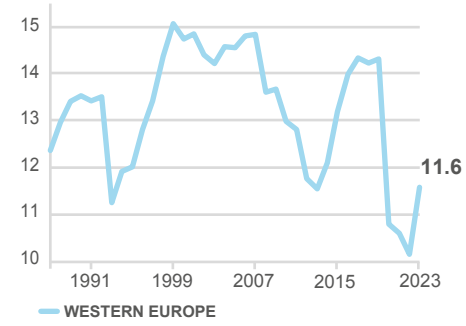
The passenger car market in Western Europe (90% of the European market) grew in 2023 by 13.9% to 11.6 million units. This rebound puts an end to three years of decline following the health crisis, which were marked by semiconductor shortages and supply difficulties. However, the market remains well below its pre-crisis level of over 14 million units, i.e. 20% higher.

By 2023, the five largest European markets will account for 78% of passenger car volumes registered in Western Europe. Germany, Europe's largest market, accounts for 25% of volumes; with the surrounding Northern European countries, this ratio rises to 45%. The German car market, which was one of the few to grow last year, recorded lower growth in 2023 than its neighbours, at just 7.3%. The other four major European markets, which were in decline in 2022, are experiencing double-digit increases. The UK market rebounded by 17.9%, accounting for 16.4% of sales in Western Europe. France, now in third place (15.3% of registrations), saw its market grow by 16.1%. The Italian automotive market, up 18.9%, is in fourth place with 13.5% of sales volumes. Finally, Spain saw its market grow by 16.7%. These strong increases do not, however, allow us to return to pre-crisis volumes, since all these markets are around 20% below their 2019 levels.

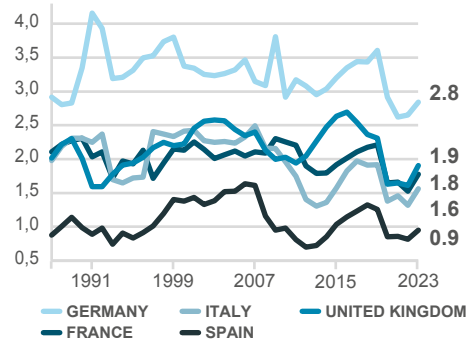
In the smaller countries of Southern Europe (Greece, Portugal), markets are accelerating their growth, which has already begun in 2022. In both countries, growth reached +27.7%, enabling Greece to exceed its 2019 level, while Portugal remains 10% behind. Finally, in Northern European countries, less impacted by COVID in 2020, registrations are up (Denmark, Finland) or stable (Sweden) in 2023, except for Norway, which, after benefiting from the dynamism of electric car sales, records a sharp decline in registrations in 2023 (-27.7%).

► NEW PASSENGER CAR REGISTRATIONS IN WESTERN EUROPE

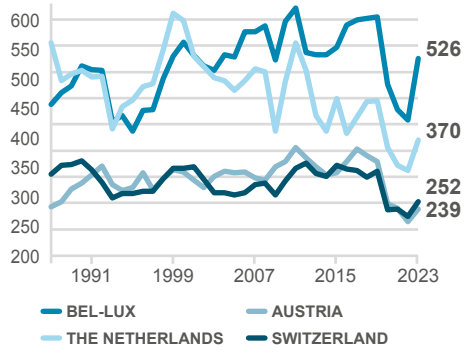
In millions of units



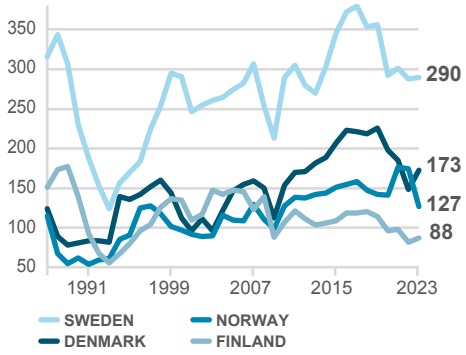
In millions of units



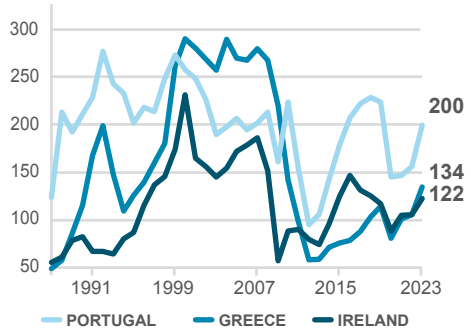
In thousands of units



In thousands of units



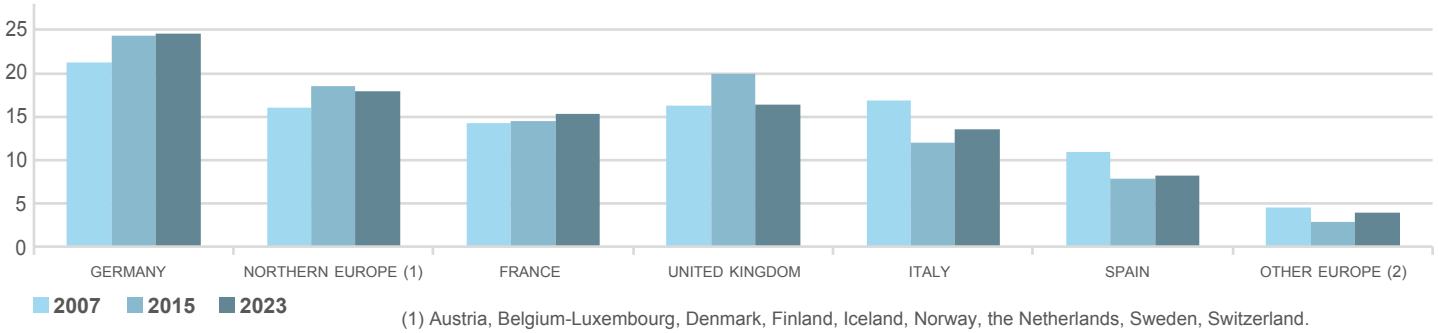
In thousands of units



+14% **Increase in new passenger car registrations in Western Europe in 2023**

As a % of the West European market

COUNTRY PENETRATION IN THE NEW PASSENGER CAR MARKET



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

The Western European market comprises the markets of 18 countries: the 15 members of the European Union before 2004, plus the countries of the European Free Trade Association (EFTA: Switzerland, Norway and Iceland). The United Kingdom, even though it officially left the EU on 31 January 2020, is still included in this group. These countries operate in a similar environment and are subject to comparable economic rules.

The market had experienced two major crises prior to 2020. The first, in 1993, saw the European market fall by 2.2 million units in 1 year, to 11.3 million units, but it recovered the following year and grew steadily until 1999. The second crisis, from 2008 onwards, saw the market fall steadily until 2013 (-3.3 million units in 6 years), to 11.5 million units. In 2020, the economic shock caused by the health crisis was so severe that the market fell to its lowest level since 1985. Against all expectations, it continued to fall in 2021 and 2022, dropping by 4.1 million units in three years. In 2023, the market's rebound finally enabled it to exceed the lows of 1985 and 1993, but it still recorded a deficit of more than 1.5 million units compared to its average level over the years 2009-2019.

NEW PASSENGER CAR REGISTRATIONS BY GROUP

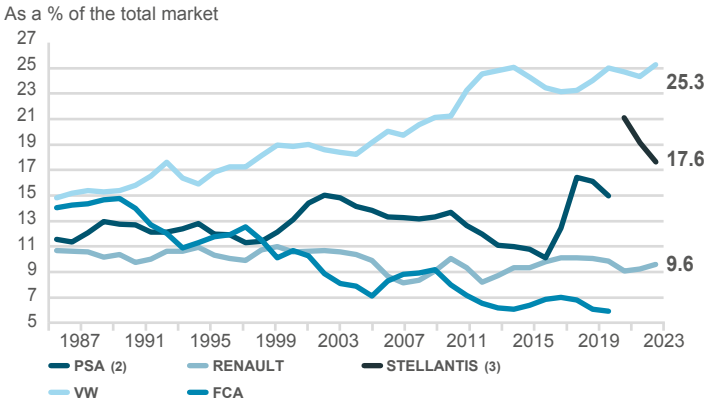
In 2023, the Renault group and Stellantis, the result of the merger of the PSA and FCA groups in January 2021, will account for 27% of the West European passenger car market.

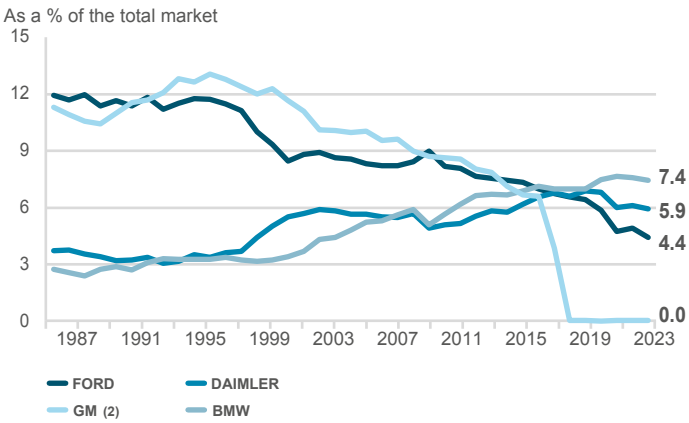
The Renault group (9.6% market share) is based on the Renault (5.5%), Alpine and Dacia brands. Dacia, which accounted for 0.5% of the market in 2007, has grown to 4.1% by 2023. Stellantis (17.6% market share) comprises 14 brands. The four PSA Group brands are Peugeot (5.3%), Citroën (3%), Opel/Vauxhall (3.7%) and DS (0.4%). The other FCA Group brands are mainly Fiat (3.2%) and Jeep (1.1%).

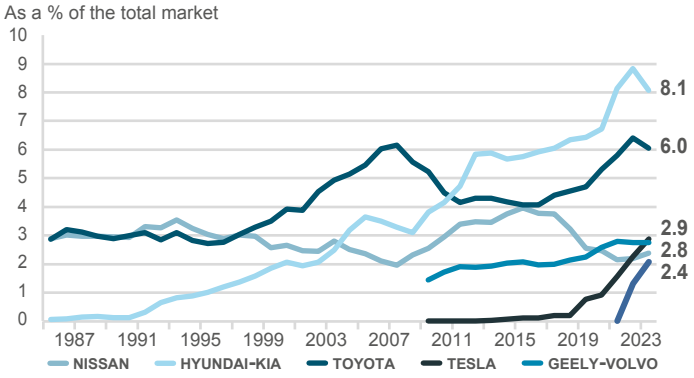
Other traditional manufacturers in Europe include the Volkswagen group, with a 25% market share, four other major generalist groups and two groups specializing in higher ranges. Each has a market share of between 2% and 9%. The Chinese group Geely has also been a major player in Europe since its takeover of the Volvo cars division in 2010, with a market share of 2.8% in 2023.

Finally, new players have been appearing on the European market in recent years. The Tesla brand really emerged in 2019, quadrupling its sales in one year and claiming 2.9% of the market by 2023. In 2022, it's the Chinese brands that have made a significant breakthrough in Europe. They will account for 2.1% of sales in 2023.

► PENETRATION OF GROUPS (1) IN WESTERN EUROPE (EU 18)







27% **Share of new passenger cars sold by Stellantis and the Renault group in Western Europe**

(1) The scope of the groups corresponds to their situation on 01/01/2024.
(2) The Opel brand belongs to the GM group until 31 July 2017 and to the PSA group from 1 August 2017.
(3) On 16 January 2021, the PSA group merged with the FCA group to create Stellantis.
See page 74 for group definitions.
Source: CCFA

Until 2004, the Renault group's market share exceeded 10% thanks to its strong presence in Southern European markets (including France), which accounted for 45% of the Western European market. Today, these markets account for only 40% of the Western European market, which weighs on the Group's performance. Nevertheless, by 2023, its market share will have risen to 9.6%.

Stellantis brands together accounted for 18% of sales in Western Europe in 2023, down 1.2 points in 2022. The Group's generalist (Citroën, Peugeot, Fiat, Opel) will lose market share in 2023, while brands Jeep and Alfa Romeo, positioned in the premium segment, will each gain 0.1 points in 2023.

Since 1995, the Volkswagen Group (VW), with its four main brands, has consolidated its position. It will regain market share in 2023, with 25.3% of sales.

The American Ford Group and its eponymous brand have halved their market share since the early 90s. In 2023, it will continue to fall to 4.4%.

German groups Daimler and BMW, specialists in upper ranges and corporate sales, have pursued a strategy of expanding their ranges with smart and Mini respectively, to gain market share. Daimler peaked in 2019 at 6.9%, but has fallen back to 5.9% by 2023, with the decline of smart in 2020 and Mercedes in 2021. The BMW Group, for its part, gained market share between 2019 and 2022, thanks to its premium BMW brand, but also to Mini, which grows every year. In 2023, Mini's market share falls by 0.1 points to 1.6% and BMW's is stable at 5.9%, giving the BMW Group a total market share of 7.4%.

Asian groups have made significant inroads into the European market since the mid-90s. Japanese groups Nissan, Toyota and Korea's Hyundai-Kia, which accounted for 7% of the market in 1995, now represent 17%. The Toyota group grew until 2007, then stalled until 2016, before growing again to reach a record 6.4% in 2022. In 2023, it marks time at 6%. The Hyundai-Kia group's penetration, virtually non-existent in 1990, has grown steadily over the last thirty years, overtaking Toyota as early as 2011. Like Toyota, it reached a record level in 2022 (at 8.8%) and is set to reach 8.1% in 2023. The Nissan group, which had reached a record penetration level of 4% in 2015, has been on the decline ever since, accounting for 2.4% of the Western European market in 2023. The Chinese Geely Group is present in Europe through the Volvo brand, acquired in 2010, and has a growing market share, reaching 2.8% in 2023.

Finally, the European market has seen the emergence in recent years of new players who are beginning to occupy a significant place in Europe. In 2023, the Tesla brand will continue to gain market share with 2.9% of sales, a level approaching that of historic generalist brands. In addition, Chinese groups, except for the already well-established Geely, emerged in 2022 and already account for 2.1% of the market in 2023.

THE RANKING BY RANGE IN 2023

Over the last twenty years, manufacturers have developed their offerings across different ranges (MPVs, 4WDs, SUVs, sedans) and different energy sources (plug-in and plug-in hybrids, electric). Stellantis and the Renault group now offer more than 87 different models, including 39 electric models. In addition, each body includes different versions depending on the car's equipment, which implies the marketing of several thousand possible combinations. New electric models have been launched on the market in recent years by Stellantis and the Renault group, particularly in the utility range (E-Berlingo, E-Expert, Kangoo ZE, Master ZE, Trafic E-Tech, E-Jumper). The electric offering has also expanded in the sedan segment (E-208, E-C4, Twingo E-Tech, Zoé, Spring, Megane-E, Corsa Electric) and in all-terrain-all-road (E-2008, DS3 Crossback, Mokka Electric).

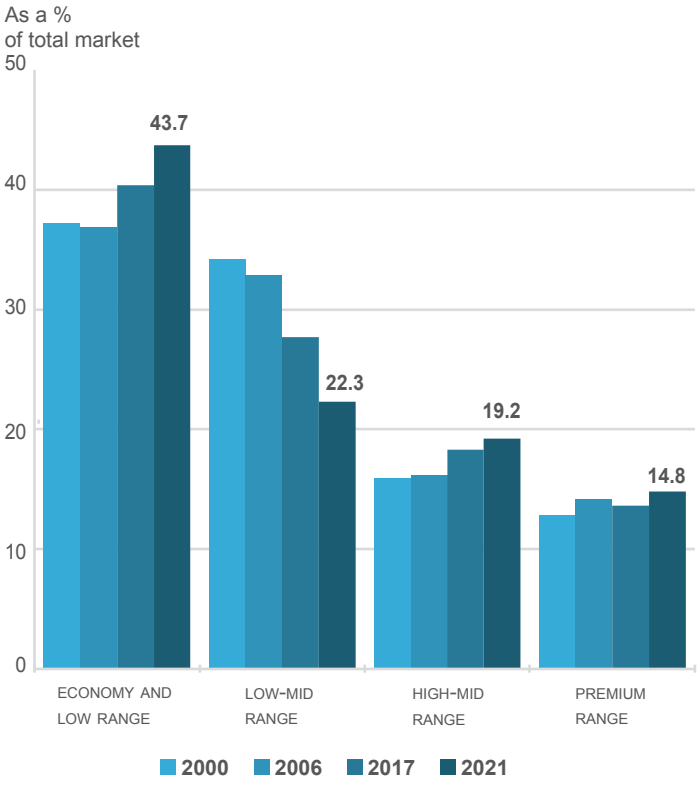
87 & 39 — **Respective numbers of models and electric models offered by the Renault group and by Stellantis**

Groups	Brands	Economy and low range	Lower-mid range	Upper mid range	Premium range
STELLANTIS	CITROËN	C3, Berlingo	C3 Air Cross, C4,C4 X, C5 Air Cross, Jumpy, Spacetourer, Jumper	C5 X	
	DS	DS3 Crossback	DS4	DS7	DS9
	PEUGEOT	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, 600, Fiorino, Doblo	Ducato, Tipo, Scudo		
	MASERATI				Ghibli, Levante, Quattroporte, MC20, Grecale, GranTurismo
	JEEP	Renegade, Avenger		Wrangler, Compass, Gladiator	Grand Cherokee
	LANCIA	Ypsilon			
RENAULT GROUP	RENAULT	Twingo, Clio, Captur, Kangoo, Zoé,Express	Arkana, Megane (incl. Scénic, Grand Scénic), Megane E-Tech, Master	Trafic, Kadjar, Koleos, Alaskan, Austral	Espace
	DACIA	Sandero, Duster, Dokker, Spring, Jogger	Lodgy		
	ALPINE				A110
BMW GROUP	BMW		Serie 1, Serie 2, M2	Serie 4, X1, X2	Alpina, Series 3, 5, 6, 7, 8, X3, X4, X5, X6, X7, XM, Z4, M3, M4, M5, M8, IX, IX1, IX3
	MINI	Mini			
DAIMLER GROUP	MERCEDES-BENZ	Citan, Classe T	Classes A, B, CLA, Vito, Sprinter, EQT	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, CLE
	SMART	Fortwo, Forfour	#1		
FORD EUROPE	FORD	Fiesta, T. Courier, T. Connect, Ecosport, Puma	Focus, Kuga, Transit, T. Custom	Mondeo, Ranger, Serie F, Bronco	S-Max, Mustang, Galaxy, Edge, Explorer, Mac-E
GEELY	VOLVO			V40, XC40, EX30	C40, S60, S90, V60, V90, XC60, XC90
SAIC MOTOR	MG		MG4, MG5, ZS, EHS		
HONDA	HONDA	Jazz, E	Civic, HR-V, E NY1, ZR-V	CR-V	
HYUNDAI KIA	HYUNDAI	Bayon, I10, I20, Kona	I30	Santa Fe, Tucson, Ioniq, Nexo, Ioniq5, Ioniq6	
	KIA	Picanto, Soul, Stonic	Cee-d, Ceed, Niro, Proceed, Rio, Xceed	Optima, Sportage, Stinger, EV6	Sorento, EV9
MAZDA	MAZDA	2, MX-30	3, MX-5, CX-5	6, CX-30	CX-60
MITSUBISHI	MITSUBISHI	Colt	ASX, Spacestar	Outlander, ECL-Cross, L200	
NISSAN	NISSAN	Micra, Juke, Townstar	Leaf, Primastar	Qashqai, X-Trail, Navara, Interstar	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 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, ID3	Passat, Arteon, Tiguan, Transporter, ID.4, ID.Buzz	Sharan, Touareg, ID.5, ID.7

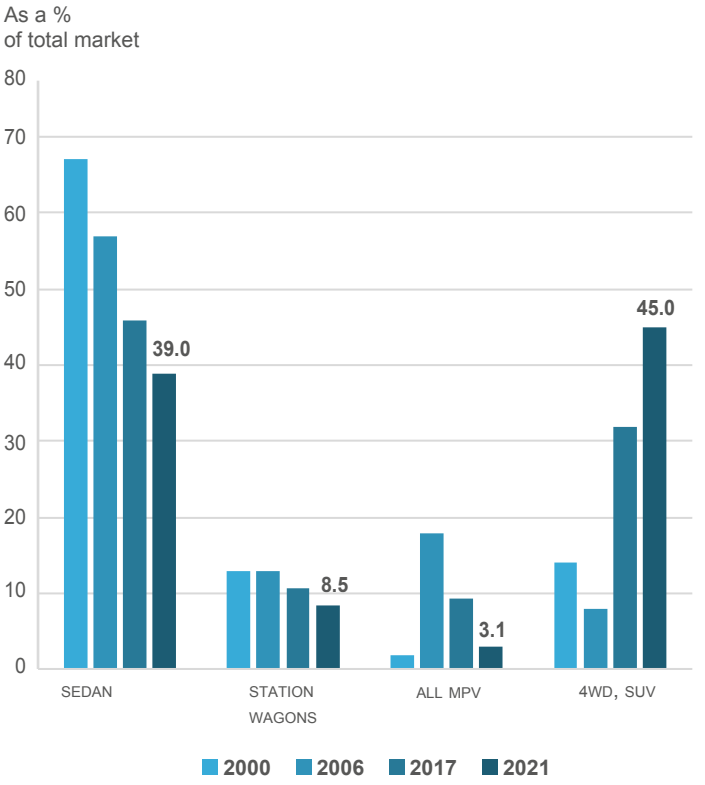
Source: CCFA

NEW PASSENGER CARS BY RANGE, BODY AND TECHNICAL SPECIFICATIONS

BREAKDOWN OF NEW PASSENGER CAR REGISTRATIONS BY RANGE IN EUROPE 18 COUNTRIES



BREAKDOWN OF NEW PASSENGER CAR REGISTRATIONS BY BODY TYPE IN EUROPE 18 COUNTRIES



Source: CCFA

In 2023, the diversity of the range continues to increase, with the market share of the 15 top passenger car models sold in Western Europe rising to 22.5%, as in 2022, from 40% in 2000.

The economy and lower ranges dominate still the market, with 44% of registrations and twelve of the fifteen best-selling models in 2023. The low-mid range, rich in sedans, declines in favour of the high-mid and premium ranges, which traditionally carry more weight when the market is low. In 2023, the premium range will be dominated by Tesla's Model Y, which will top sales volumes in Europe, with a 2% market share. Gaps remain between Northern Europe, which is more inclined towards upper ranges and estate cars, and Southern Europe, which favours low and low-mid ranges. Despite the success of the lower range and sedans in Germany and the UK during the 2009 crisis, market shares for the lower ranges in these two countries remain 5 to 11 points below the European average, while those for the upper ranges remain above (40%).

New car body styles have also evolved over the last twenty years in Western Europe. The market share of sedans continues to decline (39% in 2021, compared with 67% in 2000), to the benefit of the 4WD, SUV category, which benefits from a varied and growing range. In 2023, twelve of the twenty-five best-selling models will belong to this category. They account for 45% of the market today, compared with 14% in 2000. Their market share even exceeds 50% in Spain, Ireland, Sweden and Norway. Conversely, it is relatively lower in Germany, with 37% of sales.

The technical characteristics of vehicles (cubic capacity, power) have also evolved, thanks to the reduction in engine size (downsizing, identical engine power with less cubic capacity) and the development of electrification, but remain closely linked to the economic, fiscal and geographical conditions of each national market.

Finally, the growing electrification of passenger car sales and the loss of diesel market share do not appear to be changing the market structure. Sales by range and body style follow the trends of previous years. However, for the first time, a higher-range electric car is at the top of the best-selling list, whereas in the past, these cars were combustion-powered and belonged to the lower ranges.

12 of the 15 Best-selling models in Western Europe belonged to the economy and lower ranges in 2023

► RANKING OF THE 25 BEST-SELLING MODELS IN WESTERN EUROPE IN 2023

MODEL	VOLUME (in thousands)	%
TESLA MODEL Y	226	2.0%
DACIA SANDERO	213	1.9%
VOLKSWAGEN T-ROC	189	1.7%
RENAULT CLIO	187	1.6%
PEUGEOT 208	182	1.6%
OPEL CORSA	178	1.6%
MINI MINI	178	1.6%
FIAT 500	168	1.5%
VOLKSWAGEN GOLF	168	1.5%
VOLKSWAGEN TIGUAN	159	1.4%
FORD PUMA	153	1.3%
PEUGEOT 2008	150	1.3%
TOYOTA YARIS	145	1.3%
CITROEN C3	137	1.2%
TOYOTA YARIS CRO	136	1.2%
RENAULT CAPTUR	134	1.2%
VOLKSWAGEN POLO	134	1.2%
NISSAN QASHQAI	133	1.2%
HYUNDAI TUCSON	130	1.1%
KIA SPORTAGE	126	1.1%
FIAT PANDA	123	1.1%
DACIA DUSTER	123	1.1%
FORD KUGA	111	1.0%
VOLVO XC40	109	1.0%
AUDI A3	105	0.9%

NEW PASSENGER CARS BY ENERGY

In 2023, vehicle electrification continued in Western Europe. In a market up 13.9%, electric car registrations rose by 27.5% to 1.9 million units. Electric cars will account for 16.8% of the market in 2023, compared with 15% in 2022. Hybrid cars represent a market share of 33% in 2023, stable compared with 2022, but representing a 17% increase in volume. Non-rechargeable hybrids drove the market in 2023, with registrations up 25%, while plug-in hybrids were down 3%. Plug-in hybrids therefore lost market share in 2023, dropping from 10% to 8% of sales. Conversely, non-rechargeable hybrids gain three market share points to 26% of sales.

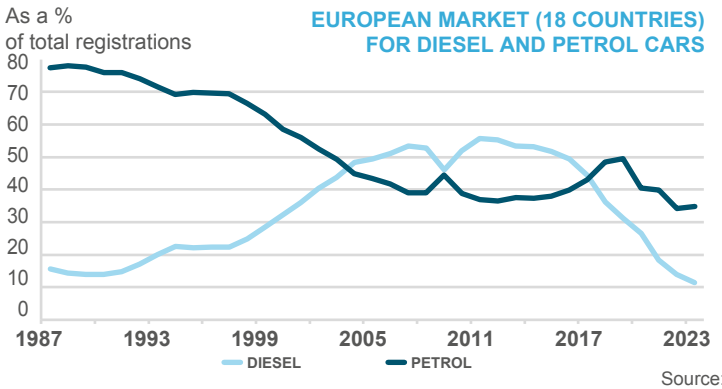
The share of new diesel-powered cars continues to contract, dropping to just from 55% in 2012. 11% in 2023. The share of diesel engines will no longer decline in 2023, and will account for 35% of sales, gaining one market share point. Diesel remains the leading propulsion energy source in Western Europe, just ahead of hybrid powertrains.

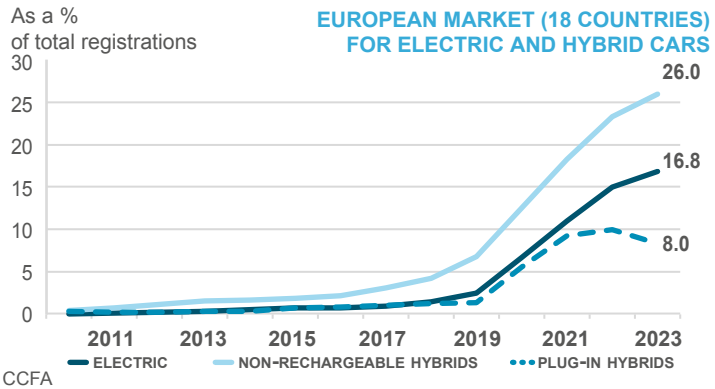
In Eastern Europe, the share of petrol, which remains high (53% in 2022), has continued to fall in 2023, to 45% of the market. Diesel engines are also on the decline, at 14%, three points higher than in Western Europe. The market share of hybrid cars, meanwhile, is as high as in Western Europe, at 33% in 2023, up five points in 2022, thanks to the success of the non-rechargeable hybrid. Finally, the car market electric still lags far behind Western European markets (5% of sales, compared with 17% in 2023).

17% **Electric vehicle market share in Western Europe in 2023**

► NEW PASSENGER CARS BY ENERGY IN EUROPE IN 2023 (AS A %)

	Diesel	Petrol	Hybrids	Non-rechargeable hybrids	Plug-in hybrids	Electric
GERMANY	16%	34%	30%	23%	6%	18%
AUSTRIA	19%	32%	28%	21%	7%	20%
BELGIUM	9%	42%	29%	8%	21%	20%
DENMARK	5%	31%	28%	18%	10%	36%
SPAIN	12%	41%	38%	32%	7%	5%
FINLAND	5%	15%	46%	26%	21%	34%
FRANCE	10%	36%	34%	24%	9%	17%
GREECE	13%	42%	37%	31%	7%	5%
IRELAND	22%	30%	29%	20%	8%	19%
ITALY	17%	29%	41%	36%	4%	4%
LUXEMBOURG	15%	33%	29%	19%	10%	22%
THE NETHERLANDS	1%	30%	37%	24%	13%	31%
PORTUGAL	12%	36%	28%	14%	14%	18%
UNITED KINGDOM	4%	41%	39%	32%	7%	17%
SWEDEN	8%	22%	29%	8%	21%	39%
ICELAND	13%	10%	26%	16%	10%	50%
NORWAY	3%	1%	14%	6%	8%	82%
SWITZERLAND	9%	33%	36%	27%	9%	21%
TOTAL 18 COUNTRIES	**11%**	**35%**	**33%**	**26%**	**8%**	**17%**
NEW EU COUNTRIES (11 COUNTRIES)	**14%**	**45%**	**33%**	**31%**	**2%**	**5%**





Source: CCFA

The development of powertrains 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 combustion-powered cars, particularly diesel (low-emission zones), as well as by financial incentives for the purchase of lower-emission vehicles (electric, hybrid or sometimes even petrol, as part of conversion bonuses).

The objective of ending sales of combustion-powered vehicles in 2035 was confirmed in 2023 by the agreement between the Council of the EU and the European Parliament on the revision of the regulation on CO_2 emission standards for light-duty vehicles. This agreement also includes interim targets for reducing CO_2 emissions (-55% by 2030 for passenger cars).

The European Commission has also set infrastructure development targets to support the deployment of electric vehicles through the Alternative Fuel Infrastructure Regulation (AFIR), which governs the deployment of charging stations for electric vehicles

According to a recent study by ACEA, the number of charging points in Europe remains highly insufficient, and the pace of installation has not kept pace with the development of the electric vehicle market. Between 2017 and 2023, sales of electric cars grew three times faster than the installation of charging points. There were 632,423 public charging points in the EU at the end of 2023 and around 3 million electric vehicles on the road. In 2023, around 153,000 new charging points were installed. According to the European Commission, a 3.5 million charging points should further be installed by 2030, while ACEA estimates that 8.8 million are needed. To meet these targets, the annual installation rate of charging stations would have to be three to eight times higher than at present.

Today, infrastructure is concentrated mainly in three countries (the Netherlands, France and Germany), which are home to almost two-thirds of all charging points in the EU but cover only 20% of the territory.

By 2023, the average penetration rate of electric cars in Western Europe will be close to 17%, but it will be much higher in Northern European countries, with penetration rates more than 30% in Denmark (36%), Sweden (39%), Finland (34%) and Norway (82%). Conversely, penetration rates remain well below the European average in southern European countries (at just 5% in Spain and Greece, and 4% in Italy) except for Portugal (18%), which is well endowed in terms of the number of charging stations in relation to its road network.

For plug-in hybrids, the same gap can be observed between Northern European countries, where market shares exceed the Western European average (8%), such as Sweden (21%) and Denmark (10%), and Southern European countries. Everywhere, however, this type of motorisation is set to decline by 2023.

Last but not least, non-rechargeable hybrids will account for over a quarter of sales by 2023 on average and appear to be expanding in both North and South. In Eastern Europe, the market share of non-rechargeable hybrids even reaches almost a third.

PASSENGER CARS IN USE IN EUROPE

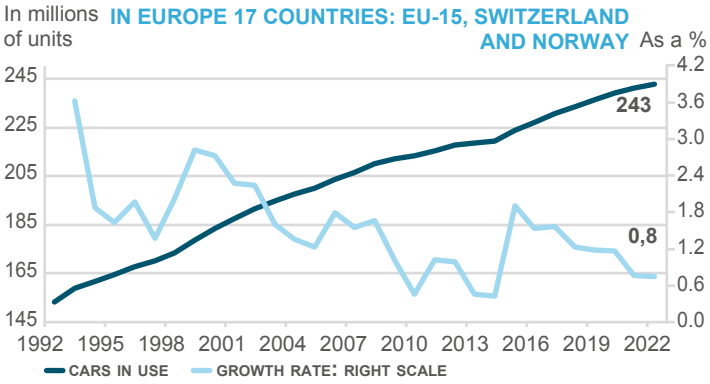
By 31 December 2022, the number of passenger cars in the enlarged Europe (EU 27 + EFTA + UK + Turkey) stood at 311 million units, an increase of 1.2% year-on-year. In Western Europe, where car density is high (545 cars per 1,000 inhabitants on average), the fleet grew by 0.8%, compared with +1.5% on average between 2014 and 2019. In the new EU member states, where the car ownership rate is generally lower (523 per 1,000 inhabitants on average outside Turkey and 162 in Turkey), the rate of fleet growth is more sustained. It grew by 2.8% on 31 December 2022, compared with 4.4% on average between 2014 and 2019. By the end of 2022, this region will account for 22% of the European fleet, compared with 15% in 2005, and several countries will have the same level of motorisation as Western Europe.

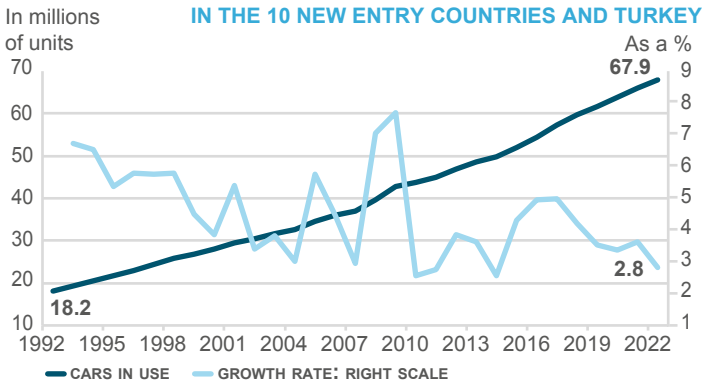
For the fourth year running, diesel's share of the Western European fleet has fallen to 39.5%. In the EU member countries of Central and Eastern Europe, this share rises to 41% of the fleet

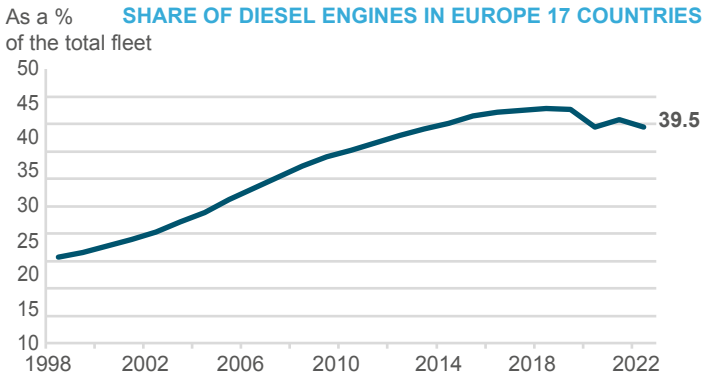
The emergence of electric cars in the European fleet remains very slow, with only 1.2% of the fleet made up of battery-powered cars. The situation varies, however, between Northern Europe, where electric cars can account for up to 4% of the fleet, and Southern and Eastern Europe, where the proportion is close to zero.

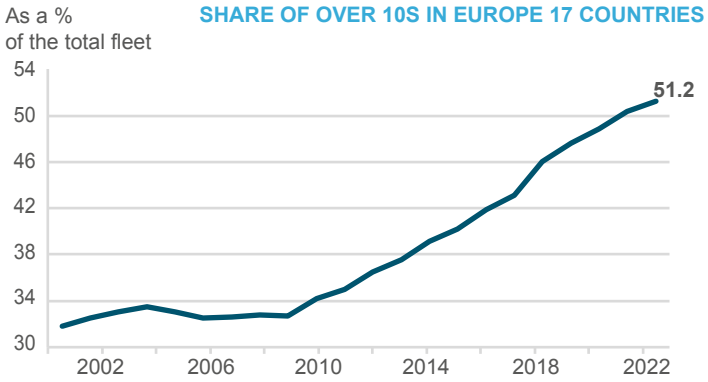
The proportion of cars over 10 years old in the Western European fleet continues to rise, reaching over 51% by 31 December 2022, with significant disparities between countries and geographical areas. In the EU member countries of Central and Eastern Europe, this percentage is even higher, with 76% of the passenger car fleet over 10 years old.

► THE NUMBER OF PRIVATE CARS AS OF 31 DECEMBER EACH YEAR









(1) The variation was calculated on a comparable basis.
Sources: ACEA, professional organisations

On 31 December 2022, the Western European passenger car fleet stood at 243 million units. High equipment levels and the crisis have curbed growth in the fleet, which averaged 1.9% a year between 1992 and 2009. From 2009 onwards, growth slowed to an average of 1.1% per year. By 31 December 2022, the installed base was growing in all European countries. In the new entrant countries and Turkey, growth has also slowed, from 5.2% a year before 2009 to 3.7% a year afterwards. In 2022, it will grow by 2.8%, after +3.6% in 2021.

After increasing by 2 points per year between 2002 and 2009, the share of diesel engines in the Western European fleet has slowed (+1.2 points per year) and is now down for the third year running at 39.5%. By the end of 2022, this type of motorisation will still be in the majority in just five Western European countries, including Spain (56%) and France (53%), despite the decline observed in these two countries. In Germany, this share is low (30%), while it is close to the European average (41%) in the UK (35%) and Italy (42%). In Eastern Europe, diesel's share of the market is declining for the second time, reflecting a switch to other powertrains, notably hybrids.

After hovering around a third between 2000 and 2009, the proportion of cars over 10 years old in Western Europe has risen steadily, reaching over 51.2% on 31 December 2022, compared with 50.4% a year earlier. This share is particularly high in Southern European countries, where it reaches almost 60% in Italy, as well as respectively 63% and 62% in Spain and Portugal. In Eastern European countries, lower-cost demand is mainly met by used vehicle imports, and the proportion of vehicles over 10 years old is even higher (77% on average). It even reaches 81% in Poland and Romania.

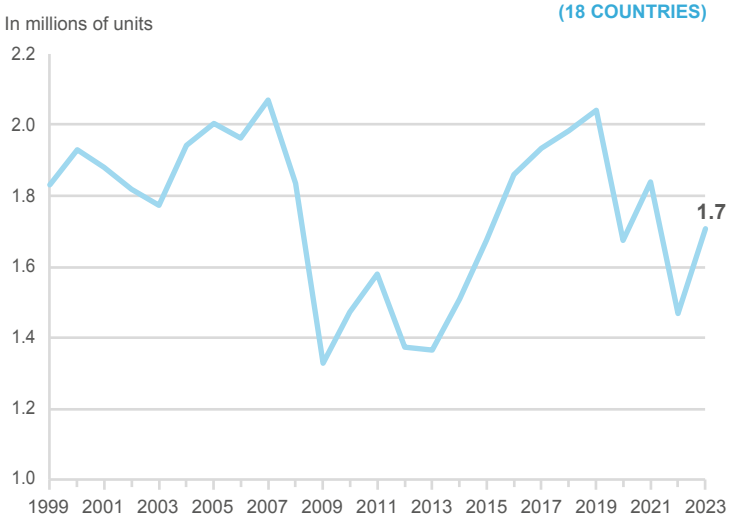
NEW LIGHT COMMERCIAL VEHICLES IN EUROPE

47% **Stellantis and Renault group share of light commercial vehicle sales in Western Europe in 2023**

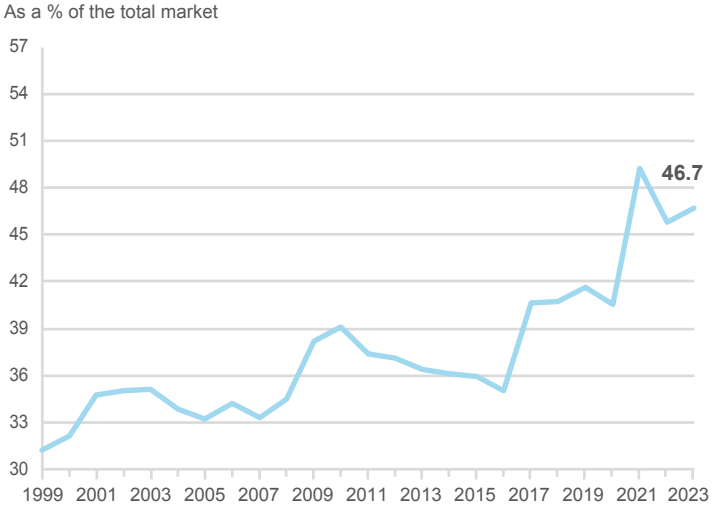
In 2023, the Western European light commercial vehicle market grew by 16% to 1.7 million units. This increase failed to offset the 20% decline in 2022 due to the difficult economic context (inflation, war in Ukraine) and persistent supply problems. The market is still 7% lower than in 2021 and 16% lower than in 2019.

The growth of the European market between 2014 and 2019 had enabled the French groups to gain market share, reaching 41.6% of the total in 2019. Then, the merger of the PSA and FCA groups in 2021 to create Stellantis enabled them to cover up to 49% of the total commercial vehicle market in 2021. In 2023, their market share is 46.7%, up slightly in 2022. After France, with a market share of 70%, the two entities have the highest market shares in Italy and Spain (around 55% of the total).

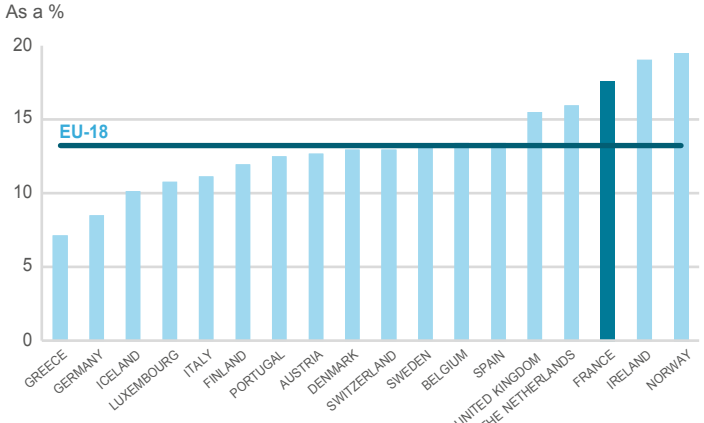
REGISTRATIONS OF LIGHT COMMERCIAL VEHICLES IN EUROPE (18 COUNTRIES)



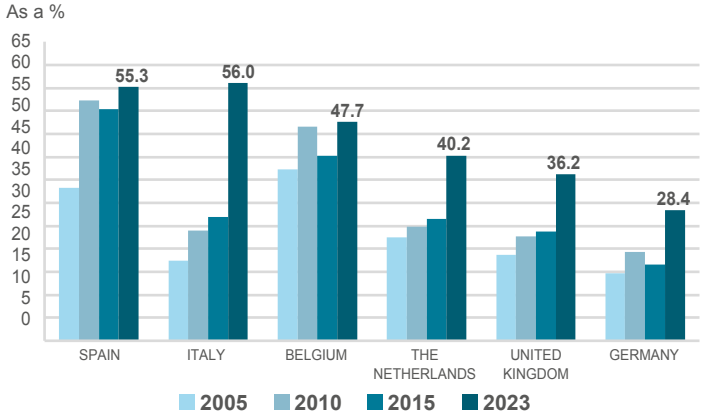
PENETRATION OF THE RENAULT GROUP AND STELLANTIS (1)



SHARE OF LIGHT COMMERCIAL VEHICLES IN LIGHT VEHICLE REGISTRATIONS (PASSENGER CARS AND LIGHT COMMERCIAL VEHICLES) IN 2023



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



(1) Penetration of the Renault and PSA groups before 2021.
Source: CCFA

Tax treatment is not identical in all European countries, so the share of light commercial vehicles (commercial vehicles less than 5.1 t) in total light vehicle sales varies from 8% in Germany to 17.6% in France. On average, it will amount to 13.1% in Western Europe in 2023. In terms of volume, France remains the leading European market, with 379,218 units, ahead of the UK (348,858 units), Germany (263,662 units), Italy (196,949 units) and Spain (146,695 units), which remains in 5th place.

Since 2014, this market has been growing steadily, and French manufacturers have gained market share compared with 2007. In 2023, Stellantis accounts for 31.2% of the market, but also produces commercial vehicles for Toyota. The Renault group has a 15.5% share of the market, and in 2023 also produced for other partner brands (Nissan, Daimler, Mitsubishi).

The van segment (Trafic, Master, Expert, Boxer...) accounts for almost half of sales, and the van segment and combispace (Kangoo, Berlingo...) for around 21%. The other segments are mainly occupied by pickups and car derivatives.

Despite the development of alternative-energy vehicles, the market share of electric or plug-in hybrid vehicles in Europe will remain low in 2023 (8.3%), compared with the passenger car market. As with passenger cars, it is highest in Norway (30%) and the Netherlands (15%), and lowest in southern European countries (8% in Portugal, 4% in Italy), including France, where the penetration rate is just 8%. In Germany, the market share of electrified vehicles is expected to reach 8% by 2023. Diesel engines still dominate this market, accounting for 84% of light commercial vehicle sales.

THE HEAVY TRUCK MARKET IN EUROPE

The Western European market for commercial vehicles over 5.1 t grew by 18.5% in 2023, returning to the volumes seen in 2019, around 313,500 units.

The enlarged market for vehicles over 3.5 t reaches 328,850 units, with double-digit growth in all Western European countries by 2023, except for Denmark and Greece (page 80). Germany, Europe's largest market, is up 24% to 95,000 units, representing 29% of sales volumes in Western Europe in 2023. The UK, the second-largest market ahead of France since 2022, grew by 16% in 2023, widening the gap with France to 53,270 units (vs 49,610 for France). In 2023, Germany has regained its 2019 volumes, while the UK exceeds them by 10%. Conversely, France is still 10% behind its 2019 market. In fourth place, the Spanish market, growing by 22% in 2023, is now catching up with Italy, with 28,600 units registered, representing 9% of the Western European market.

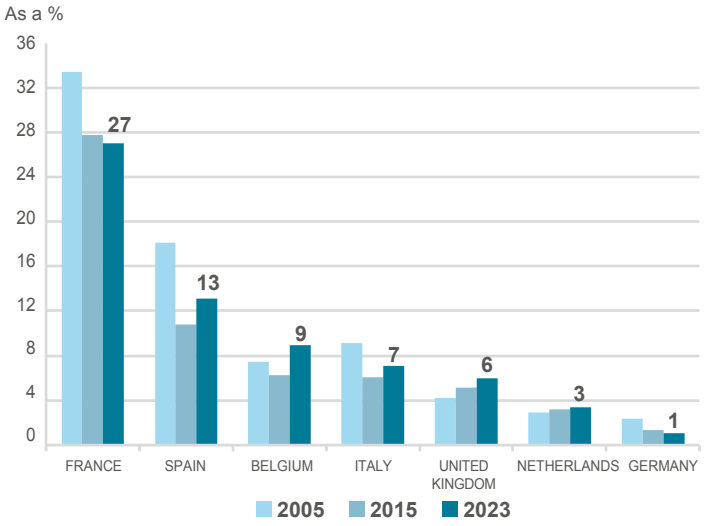
28,011 **New commercial vehicles Renault Trucks over 5 t sold in Western Europe in 2023**

► THE INDUSTRIAL VEHICLE MARKET IN WESTERN EUROPE
(In thousands of units)

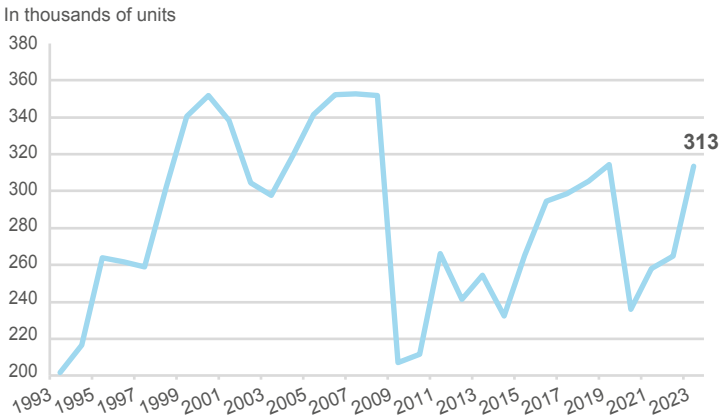
	2010	2015	2022	2023	Variation 2023/2022
REGISTRATIONS OF NEW INDUSTRIAL VEHICLES					
from 5.1 t to 15.9 t	54	48	40	49	22.2%
16 t and more	159	217	224	264	17.8%
TOTAL	**212**	**265**	**265**	**313**	**18.5%**

Source: ACEA, CCFA estimate

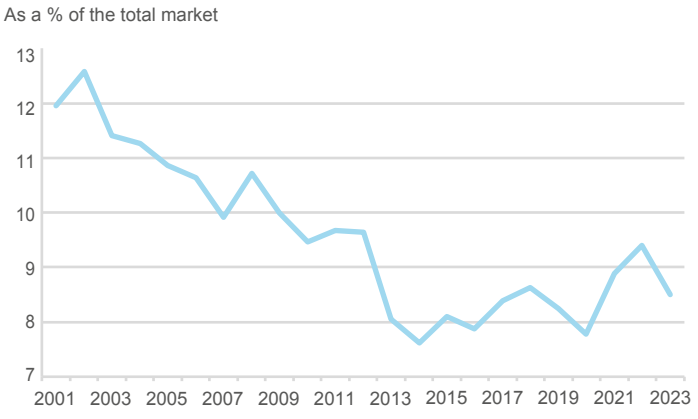
RENAULT TRUCKS MARKET SHARE IN MAJOR EUROPEAN COUNTRIES



REGISTRATIONS OF NEW INDUSTRIAL VEHICLES IN WESTERN EUROPE



RENAULT TRUCKS' PENETRATION IN WESTERN EUROPE



Source: CCFA

Over the last few decades, the European market for commercial vehicles over 5 t has seen a wide range of trends, all of which are closely linked to the macro-economic context. The year 2000 marked an initial high point after the 1993 crisis, and the market then bottomed out, before breaking new volume records in 2006-2008 at 350,000 units. With the financial and economic crisis of 2009, it then collapsed, losing 150,000 units in one year. It then hovered around 250,000 units, before picking up again between 2015 and 2019, without however returning to the record levels of 2000 and 2007. With the health crisis of 2020, the market fell back to 240,000 units, then rebounded slightly in 2021 and 2022. In 2023, it finally returned to its pre-crisis level of 313,000 units.

Vehicles weighing 16 t or more (rigids or tractors) dominate the European industrial vehicle market. On average, they account for 8 out of 10 vehicles. This ratio is slightly lower in Germany and the UK (around 70%), while it exceeds 90% in Sweden, Denmark and the Netherlands.

The market for commercial vehicles over 3.5 t powered by alternative energies (gas, electric, hybrid) remains small (5.3% in 2023). Electrified vehicles continued to grow, with registrations up 112% in Western Europe. In 2023, registrations of vehicles powered by other alternative energies (notably gas), which had contracted in 2023 due to the rise in gas prices linked to the conflict in Ukraine, developed differently from country to country. Total volumes rebounded slightly (+11%), thanks to the UK (+49%), EFTA countries (+64%), Sweden (+58%) and Spain (+19%). By contrast, volumes contracted further in most Eastern European countries and Germany. The energy transition remains a major concern for manufacturers, as it is for road haulage companies, who must anticipate legislative and regulatory changes (CO_2 emission reduction targets, traffic restrictions in cities, sustainable urban logistics). The range of electric vehicles is growing and now covers all uses (urban delivery, regional transport, construction), but the market share of these vehicles remains very low in relation to European targets for reducing CO_2 emissions from heavy-duty vehicles (1.5% by 2023 on the European market for vehicles over 3.5 t).

Against this backdrop, Renault Trucks has established itself as one of the leaders in carbon-free mobility, with a 22.4% market share of electric vehicles over 16 t in Europe. Taking all energies together, Renault Trucks share of will have an 8.5% the European market for commercial vehicles over 6 t by 2023.

REGISTRATIONS AND PRODUCTION IN THE NEW EU MEMBER STATES

Vehicle production in the new EU countries set to reach 4.2 million units in 2023, up 12.6% after an initial rebound of 6% in 2022. However, production levels are still 4.6% lower than in 2019. Registrations also rose in 2023 to 1.5 million units, up 12% on 2022. Penalised last year by semiconductor supply problems, registered volumes remain down 13% on 2019.

The Renault group and Stellantis have had a commercial presence in the region for many years and also have manufacturing facilities: Stellantis (excluding FCA) in Slovakia and Poland; Renault in Slovenia and, above all, Dacia in Romania. Together, these sites represented a total production of 720,000 units in 2023. New light vehicle registrations by Stellantis and the Renault group in these countries amounted to 280,000 units in 2023, representing a 21% market share, down in 2022.

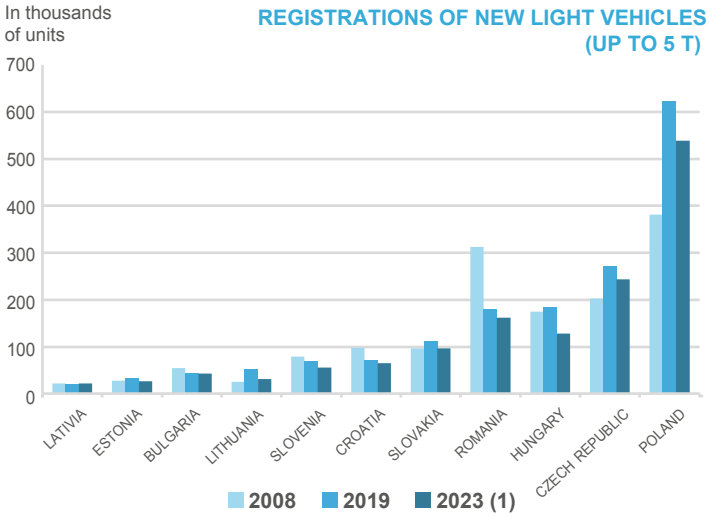
21% **Market share of the Renault group and Stellantis in new light vehicles sold in the new EU member states in 2023**

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

	2022	2023	Variation 2023/2022
VEHICLE PRODUCTION (1)			
Passenger cars	3,474	3,858	11%
Light commercial vehicles	236	320	35.7%
Industrial vehicles			
TOTAL VEHICLES	**3,710**	**4,179**	**12.6%**
NEW VEHICLE REGISTRATIONS (2)			
Passenger cars	1,111	1,250	12.6%
Light commercial vehicles (<=3.5t)	143	164	15.0%
Industrial vehicles (>3.5t)	85	89	3.8%
TOTAL VEHICLES	**1,339**	**1,503**	**12.3%**

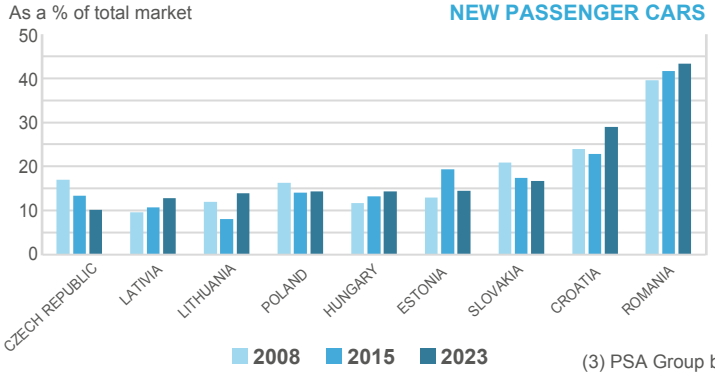
(1) 6 countries.
(2) 11 countries, excluding Malta and Cyprus.
Sources: CCFA, OICA

REGISTRATIONS OF NEW LIGHT VEHICLES (UP TO 5 T)

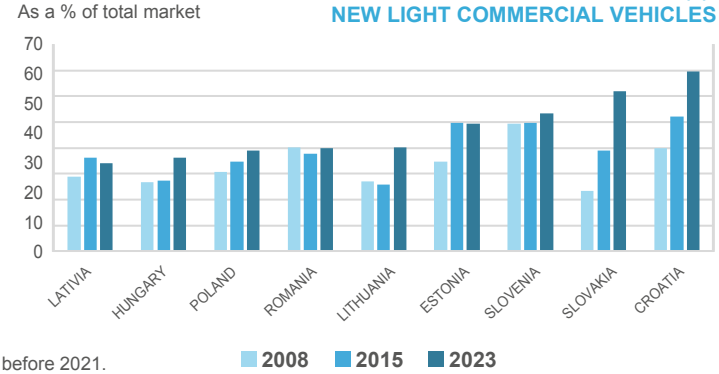


(1) Up to 3.5 t of GVW.
Source: CCFA

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



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



(3) PSA Group before 2021.
Source: CCFA

While the 15-country European Union is now a car market where demand is primarily for renewal, this is not yet the case in all the new EU member states. The average car ownership rate of 574 passenger cars per 1,000 inhabitants in the European Union conceals major disparities between countries. It is now around 400 in Latvia and Romania and between 400 and 500 in Hungary, Croatia and Slovakia, but 703 in Poland and around 600 in Estonia, Slovenia and the Czech Republic. Poland (38%) and the Czech Republic (18%) together account for 56% of passenger car registrations in the zone, followed by Romania (12%) and Hungary (9%). For light commercial vehicles, the leading market continues to be Poland (39%), followed by the Czech Republic (14%).

In 2023, automotive markets in the new member states of the European Union rebounded, as they did in Western Europe, after two years marked by the post-Covid period and its consequences for semiconductor supplies. In a passenger car market set to grow by 12.6% in 2023, the leading markets of Poland and the Czech Republic have increased by +13.2% and +15.3% respectively. The Romanian market, in third place, grew by 11.8%. The light commercial vehicle market grew by 15%, while heavy vehicle registrations rose by 3. The Polish market, which is the zone's leading market by volume for light commercial vehicles (39% of the total) and heavy-duty vehicles (42% of the total), grew in these segments by 12.4% and 3.4% respectively. While the market for light commercial vehicles has not yet reached its 2019 levels, for heavy vehicles, 2023 is a record year, with 37,3000 units registered, up 30% on 2019.

The technical characteristics (cubic capacity, horsepower, bodywork) of passenger cars registered in this zone are like those in Western Europe, with the exception of those relating to motorisation. The share of petrol-powered cars has risen slightly, and remains almost higher 10 points than in Western Europe (45%, versus 35%). By 2023, the market share of electric cars has risen by one point to 5%, which is still very low compared with Western Europe (17%). Hybrid powertrains have also grown (+5 points in 2023), reaching 33% of registrations, compared with 34% in Western Europe. This development is essentially due to the success of non-plug-in hybrids, which will account for 31% of sales in 2023, compared with 26% in Western Europe. In Poland, the zone's largest market, non-plug-in hybrids will account for 40% of new car registrations in 2023.

THE AUTOMOTIVE INDUSTRY IN THE EUROPEAN UNION

In 2021, the European automotive industry continued to be affected by the Covid crisis and its consequences on supply chains, particularly the shortage of semi-conductors, which weighed on the restart of production. In value terms, however, production rose by 13.3% in 2021, and value added increased by 18%. Jobs continue to shrink. The number of people employed in the automotive industry fell by 1.4% in 2021. In 2021, the automotive industry will employ 2.4 million people, or 8.3% of industrial jobs in Europe. These jobs are divided between vehicle manufacturing (45% of jobs), automotive equipment manufacturing (49%) and body and trailer manufacturing (7%).

In the 7 countries of Western Europe, where the automotive industry has historically been present, the sector's workforce declined sharply between 2005 and 2010, while it increased in the 7 new EU member states. Then, thanks to market growth and the increased value of products manufactured in this zone, the workforce increased again between 2010 and 2019, thanks to Germany, but without returning to its initial level. France, for its part, has benefited little from this context, due to its deteriorated competitiveness. In 2021, its workforce will decline by a further 3.6%, compared with -1.4% for the European Union as a whole. In Eastern Europe, the workforce grew by 460,000 between 2005 and 2019 but declined in 2020. In 2021, these are the only countries, along with Sweden, where the workforce will grow (+8,400 people).

In 2021, value added per person employed in Europe will return to 2019 levels at €83,000. In France, it stands at €79,000, below the European average and at a lower level than in Italy, in contrast to the pre-crisis period. The gap between France and Germany widens in the latter's favour, rising from €31,000 in 2019 to €47,000 in 2021. In 2021, personnel costs per person employed average €56,000, but with significant disparities within Europe. It amounts to €63,000 in France, to €87,000 in Germany, but just €21,000 in the 7 Central and Eastern European countries. Social charges account for 27% of these expenses in France, compared with 20% in Germany and 22% on average in Europe.

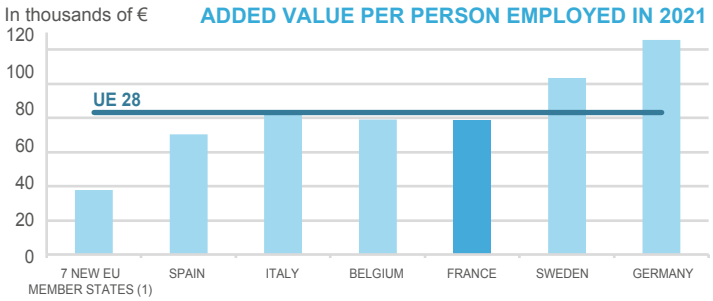
In France, the EBIT/VA ratio is structurally below the European average, underlining the lesser competitiveness of the French site.

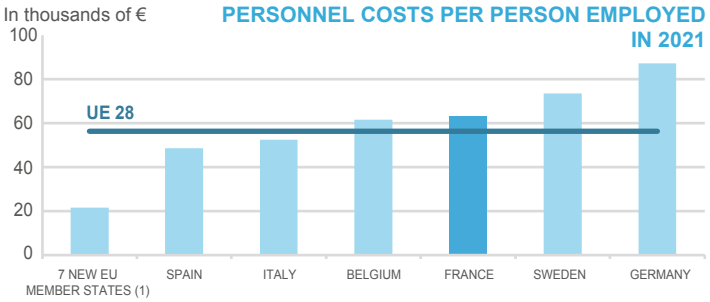
The automotive industry, one of the key sectors of the European economy, includes the manufacture of motor vehicles, bodies and trailers, and automotive equipment.

2.4 MILLION People employed in the automotive industry in Europe

► THE AUTOMOTIVE INDUSTRY IN THE EUROPEAN UNION 27 COUNTRIES AND THE UNITED KINGDOM IN 2021 (1)

	Units	European Union (27 countries)	Germany	France	Spain	Italy	Sweden	Belgium	7 new countries (1)	United Kingdom (2018)
Employed personnel	**thousands**	**2,453**	**872**	**226**	**157**	**169**	**92**	**29**	**772**	**166**
including motor vehicle construction	thousands	1,100	558	114	68	65	70	17	161	85
including body and trailer manufacturing	thousands	162	53	23	12	13	5	5	29	21
including automotive equipment manufacturing	thousands	1,193	261	90	77	91	18	7	582	60
Turnover	**millions of euros**	**1,070,000**	**519,082**	**129,107**	**64,318**	**68,518**	**50,244**	**15,131**	**179,753**	**88,239**
Production	**millions of euros**	**874,000**	**415,737**	**79,248**	**60,290**	**63,575**	**32,668**	**14,183**	**165,946**	**76,217**
Production/Turnover	%	82%	80%	61%	94%	93%	65%	94%	92%	86.4
Value added (at factor cost)	**millions of euros**	**204,000**	**109,728**	**17,775**	**11,084**	**13,939**	**9,480**	**2,325**	**29,403**	**18,965**
Value added/Production	%	23%	26%	22%	18%	22%	29%	16%	18%	24.9
Value added per person employed	thousands of euros	83	126	79	70	83	103	79	38	114
	base 100: 7 new EU member states	218	330	206	185	217	271	208	100	299
Purchases of goods and services	**millions of euros**	**888,000**	**415,234**	**110,705**	**55,709**	**56,888**	**43,571**	**12,939**	**154,507**	**71,060**
Share of purchases in production	%	101.6	99.9	139.7	92.4	89.5	133.4	91.2	93.1	93.2
Personnel expenditure	**millions of euros**	**138,000**	**75,853**	**14,272**	**7,604**	**8,808**	**6,723**	**1,811**	**16,523**	**8,879**
Expenditure per person employed	thousands of euros	56	87	63	48	52	73	62	21	53.4
	base 100: 7 new EU member states	263	406	295	226	244	342	288	100	249
Gross operating surplus (GOS)	**millions of euros**	**65,800**	**33,875**	**3,504**	**3,481**	**5,131**	**2,756**	**514**	**12,881**	**10,086**
EBE/VA	%	32.3	30.9	19.7	31.4	36.8	29.1	22.1	43.8	53.2





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

In 2021, France will account for 9.2% of the total automotive workforce in the European Union excluding the UK, while Germany will account for 35.6%, Italy for 6.9% and Spain for 6.4%. In 2005, these rates were 12% for France and 39% for Germany. Western Europe's share of the workforce has fallen (70% in 2021, versus 84% in 2005), to the benefit of new, lower-cost countries such as the new entrants to the European Union, represented here by 7 countries (Hungary, Poland, Czech Republic, Romania, Slovakia, Slovenia and Bulgaria). They now account for 31.5% of the total workforce, compared with 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 automotive industry workforce is employed in car manufacturing, compared with 50% in France, 43.4% in Spain, 39% in Italy and 21% in the seven new entrants. In 2021, the gap in labour costs between Germany or France and the new entrants remains significant. The index of expenditure per employed person, expressed on a base of 100 for the average of the seven new entrants, stands at 295 in France, 342 in Sweden and 406 in Germany. After increasing with the social support policies put in place by governments in 2020, it fell in 2021.

On average in the European Union, the automotive industry accounts for 8.3% of direct industrial jobs, but it reaches 11% of jobs in Germany, 13.7% in the Czech Republic, 14.1% in Sweden and around 15% in Romania and Slovakia. In addition to direct jobs, the automotive industry also generates indirect jobs, which ACEA estimates 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. If we add all the jobs linked to the automotive industry in services (sales, repairs, hire, insurance), transport (passengers 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 2023

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

In 2023, the Stellantis group, formed from the merger of the PSA and FCA groups, sold 6.2 million vehicles, compared with 5.8 million in 2022. It brings together 14 car brands and 2 brands dedicated to mobility and in 2023 has a workforce of 260,000 people worldwide, including 45,000 in France, spread over some 20 sites: assembly plants, plants producing combustion engines and now electric motors (Trémery) and mechanical engines; R&D centres (Vélizy then Poissy), spare parts stores (Vesoul).

In France, downstream development is taking place in the distribution of parts through Distrigo, MisterAuto and B-parts and in maintenance and repair through the Eurorepar Car Service network. For distribution, the group relies on 'Stellantis & You, Sales and Services', resulting from the merger of PSA Retail and Motor Village (Distribution Division of the former FCA Group). It has also increased its presence in the second-hand market with AramisAuto and Spoticar, multi-brand second-hand vehicle labels. With the Free2Move and Leasys brands, it is developing mobility services, including internationally, and strengthened its position in 2022 with the acquisition of Share Now.

In 2022, the group presented the Dare Forward 2030 strategic plan, which aims for carbon neutrality by 2038 and a 50% reduction in emissions by 2030 through decarbonisation and the circular economy. Its goal is to sell 100% electric vehicles in Europe and 50% in the United States by 2030 and to have more than 75 fully electric models by 2030. To achieve this, numerous investments are being made to transform engine factories, develop electric and hydrogen mobility and strengthen the circular economy: inauguration of the ACC battery factory with Total Energies and Mercedes-Benz in Douvrin in the Nord department (May 2023), acquisition of a stake in Symbio (a joint venture held equally with Forvia and Michelin), leader in zero-emission hydrogen mobility (May 2023), strategic agreement with CATL for the local supply of LFP batteries on the European market (November 2023), securing the supply of raw materials necessary for the energy transition (lithium, nickel and cobalt) through cooperation agreements or shareholdings (Vulcan Energy, Alliance Nickel, Kuniko, CTR), creation of a joint venture with Gallo for the recycling of end-of-life vehicles (June 2023), inauguration by Symbio of SymphonHy, the first gigafactory in France dedicated to the production of hydrogen fuel cells (December 2023).

Internationally, the Stellantis group has a strong presence in Europe, North America and Latin America. It plans to continue developing its activities around the world (India, Africa, Middle East) and announced in March 2024 that it would invest €5.6 billion in South America between 2025 and 2030.

Renault Group: www.renault.com

In 2023, the Renault group sold 2.2 million vehicles worldwide, up from 2 million in 2022. In 2023, it has a workforce of 106,000 worldwide, including 38,000 in France at some fifteen sites: assembly plants (Batilly, Sandouville), engine and mechanical production plants (Cléon, Le Mans), a site dedicated to the circular economy (Flins) or electric vehicles (Electricity centre), R&D centres (Guyancourt).

In France, its downstream presence is based on Renault Retail Group, which distributes new and used vehicles, as well as parts under various brands, but whose activities also cover mechanics, bodywork, rapid services (Renault Minute Services), mobility services with Mobilize (a brand dedicated to new mobilities and services related to electric mobility) and financing with Mobilize Financial Services (the commercial brand of RCI Banque).

With the 'Renaulution' strategic plan launched in 2021, the group has committed to achieving zero CO_2 impact by 2040 in Europe and by 2050 worldwide. All new models launched from 2022 will have an electric or electrified version, in a market where, in 5 years' time, 50% of vehicles sold will be electric or hybrid. The Ampère entity dedicated to electric vehicles and software will be launched at the end of 2023. Activities related to combustion engines and hybrids are grouped together within the Power entity and are at the heart of the Horse joint venture, created in July 2023 with Geely. Finally, the future is NEUTRAL, created in 2022, brings together the Renault group's activities in the circular economy, including the remanufacturing of the Refactory in Flins.

To achieve its decarbonisation objectives, the manufacturer is also investing in batteries (participation in Verkor) and is working on hydrogen vehicles through the Hyvia joint venture created with Plug Power in June 2021. The Renault group has entered into agreements to secure its supplies of decarbonised 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, Renault and Nissan signed a new agreement to continue collaborating on operational projects with high added value. Among these projects, Renault Group and Nissan have already announced their renewed commitment to activities in India through new investments and new vehicles. The agreement also aims at strengthening cooperation in electrification and low-emission technologies (Nissan's investment in Ampère).

Renault Group also signed an agreement in October 2023 with the Volvo Group to create a new company to offer 100% electric van vehicles and associated services to meet the needs of carbon-free logistics.

Renault Trucks: www.renault-trucks.com

Renault Trucks is one of the world's leading truck manufacturers, with 70,000 vehicles sold in 2023. Renault Trucks sales are up 18% compared to 2022. Its truck models are assembled in France at its factories in Bourg-en-Bresse and Blainville-sur-Orne and rely on partners for local assembly.

A member 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 outlets. In addition to the complete assembly of vehicles, Renault Trucks has engine assembly and stamping activities in Vénissieux, design and research in Saint-Priest, and parts reconditioning in Limoges. In addition, as part of the circular economy, Renault Trucks has set up 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), and in 2023 carried out an electric retrofit project in collaboration with Novumtech and with the financial support of ADEME. A 12-tonne diesel truck was converted into a battery-powered electric truck.

The manufacturer now offers a complete range of alternative energy vehicles (gas, B100 biodiesel, electric) for light commercial and heavy goods vehicles. It also offers a range of services including solutions to promote fuel economy (Optifuel Solutions), as well as predictive maintenance services (Start & Drive Excellence Predict). It continues to invest heavily in electric mobility, as part of a trajectory aimed at a 100% carbon-neutral offering from 2040, with an intermediate stage with the objective of 50% of volumes in electric in 2030. To complete its range, Renault Trucks is developing cooperative ventures with Renault (E-Tech Master and E-Tech Trafic) and Kleuster (cargo bikes). In November 2023, Renault Trucks will begin mass production of 44-tonne electric trucks (E-Tech T and C) at the Bourg-en-Bresse plant. These vehicles, dedicated to regional distribution and urban construction, complete the manufacturer's 100% electric range, extending from 650 kg (cargo bikes) to 44 t.

94,000 employees Workforce of French manufacturers

	Units	Stellantis	Renault Group	Volvo Group
Turnover	millions of euros	189,544	52,376	48,179
Research and development expenditure	millions of euros	7,484	2,240	2,322
Net income	millions of euros	18,625	2,300	4,352
Global workforce	number of people	258,275	105,497	104,147
including France	number of people	45,000	38,101	11,000

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

LOCATION OF RENAULT GROUP, STELLANTIS (EXCLUDING FCA) AND RENAULT TRUCKS FACTORIES IN 2023

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

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

Italy
25 Val di Sangro

Poland
26 Gliwice (Opel)

Portugal
27 Mangualde

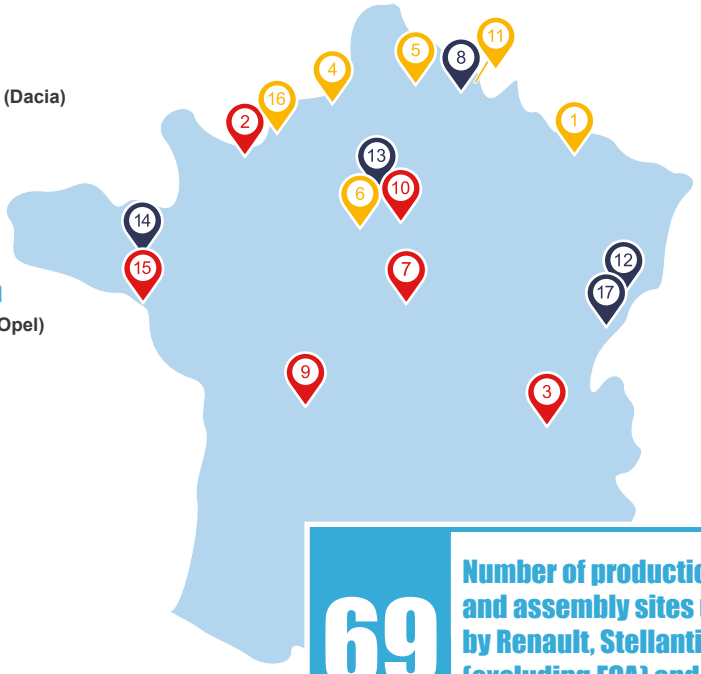
Romania
28 Mioveni (Pitesti) (Dacia)

Slovakia
29 Trnava

Slovenia
30 Novo Mesto

United Kingdom
31 Ellesmere Port (Opel)
32 Luton (Opel)

Turkey
33 Bursa (Oyak)
34 Bursa (Karsan)



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

STELLANTIS (EXCLUDING FCA)
RENAULT TRUCKS
RENAULT GROUP

AMERICA

Argentina
35 Buenos Aires (Palomar)
36 Cordoba (Santa Isabel)

Brazil
37 Curitiba
38 Porto Real
39 Betim (Fiat)

Colombia
40 Envigado (Sofasa)

Mexico
41 Cuernavaca (Nissan)

Uruguay
42 Montevideo (Nordex)

AFRICA

Algeria
43 Oran (Oued Tlelat)
44 Oran (Tafraoui) (Fiat & Opel) (project)
45 Meftah (BSF Souarki)

Egypt
46 (Mansour Group) (project)

Kenya
47 Thika (URYSIA)
48 Thika (CKD par Caetano Kenya/KVM)

Morocco
49 Kenitra
50 Casablanca
51 Tanger

Nigeria
52 Kaduna (PAN)
53 Lagos (Coscharis group)

Tunisia
54 Tunis (STAFIM)

Ghana
55 Tema SSA

South Africa
56 IDC (projet)

ASIA

Saudi Arabia
57 KAEC (CKD par AVI - Zahid Group)

China
58 Chengdu (Dongfeng)
59 Shenzhen (SQRI)
60 Dingzhou (ChangAn)
61 Wuhan (Dongfeng)
62 Nanchang (JMEV)
63 Shiyan (eGT-NEV)

South Korea
64 Busan (Renault Korea Motors)

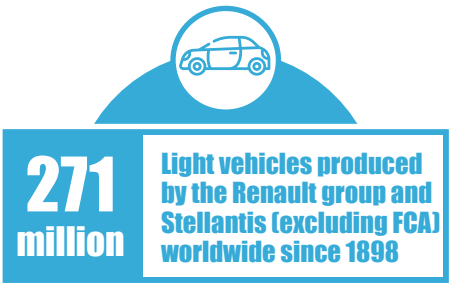
India
65 Thiruvallur (Chennai) HMFCL - CK Birla
66 Chennai (Renault-Nissan)

Malaysia
67 Gurun (Naza Automotive Manufaturing)

Vietnam
68 Chu Lai (Thaco)

Pakistan
69 Karachi (Lucky Motor Corporation)

WORLD PRODUCTION OF AUTOMOBILE GROUPS



In 2023, worldwide production by the Renault group and Stellantis (excluding FCA) fell by 3.7% to 5.2 million vehicles. Improvements in the supply of electronic components and logistics in 2023 led to a timid recovery in production. Between 1996 and 2018, it had risen by over 110%, for an average annual growth rate of 3%, thanks both to increased sales in Europe outside France, and subsequently to those outside Europe. In 2023, it is still 34% below its 2018 level, heavily affected by geopolitical developments (Iran, Russia) and production difficulties in China.

The production of passenger cars amounted to 4.1 million units, down 0.9% compared to 2022 and more than 40% compared to the record of 2018. On the other hand, the production of light commercial vehicles rebounded by 25% to 1.1 million units and even reached a record level, higher than its 2018 level.

The Renault group and Stellantis (excluding FCA) have a wide variety of sites: historic plants (Sochaux, Sandouville), recent plants in emerging countries (Tangiers, Kenitra), large-scale plants (Vigo, Pitesti), those producing a single model type (Trnava, Bursa) or a wide variety (Chengdu, Curitiba), light commercial vehicles van-type (Hordain, Batilly) and smaller light commercial vehicles (Maubeuge, Vigo). More and more of these sites are producing electric vehicles. Some, like Douai, are totally dedicated to the production of electric vehicles, while others are multi-energy plants (Mulhouse, Poissy, Novo Mesto….). In addition, the Renault group and Stellantis produce vehicles on sites belonging to partners when this represents an opportunity (Oran, Vietnam, etc.).

► PRODUCTION OR ASSEMBLY LOCATIONS BY MODEL IN 2023

STELLANTIS (EXCLUDING FCA)

Brands and models	Production or assembly locations in 2023
Peugeot: 208	Trnava (Slovakia), Kenitra (Morocco), Buenos Aires (Argentina), Zaragoza (Spain)
Citroën: C3, C3 Aircross, C3-XR	Trnava (Slovakia), Zaragoza (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), Wuhan (China), Vigo (Spain), Gurun-Malaysia (Naza Automotive Manufacturing), Chulai-Vietnam (THACO), Pakistan (Lucky Motor Corporation)
Peugeot: 3008	Sochaux (France), Chulai (Vietnam), Gurun (Malaysia)
Peugeot: 4008	Chengdu (China) (DPCA), Gurun (Malaysia)
Peugeot: 5008	Rennes (France), Sochaux (France), Chengdu (China), Gurun (Malaysia), Chulai (Vietnam)
Citroën: C4, C4 X	Villaverde (Spain)
Citroën: C4 Cactus	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	Mulhouse (France), Wuhan-Chengdu (China), Chulai (Vietnam)
Peugeot: 508	Mulhouse (France), Wuhan (China)
Peugeot: Partner, Rifter / Citroën: Berlingo / Opel: Combo	Vigo (Spain), Mangualde (Portugal), Palomar (Argentina), Ellesmere (United Kingdom)
Peugeot : Partner Rapid	Betim (Brazil)
Peugeot: Expert / Citroën: Jumpy	Hordain (France), Montevideo (Uruguay) (Nordex), Luton (United Kingdom)
Peugeot: Traveler / Citroën: Spacetourer	Hordain (France), Vietnam (THACO)
Peugeot: Boxer / Citroën: Jumper / Opel: Movano	Val di Sangro (Italy), Gliwice (Poland)
Opel: Vivaro, Zafira Life	Hordain (France), Luton (United Kingdom)
Opel: Corsa, Crossland	Zaragoza (Spain)
Opel: Astra	Rüsselsheim (Germany)
Opel: Insignia	Rüsselsheim (Germany)
Opel: Grandland	Eisenach (Germany)
Opel: Mokka	Poissy (France)

Source: Stellantis

RENAULT GROUP

Brands and models	Production or assembly locations in 2023
Alpine: A110	Dieppe (France)
Renault: Twingo 3, Twingo Electric	Novo Mesto (Slovenia)
Renault: Kwid	Chennai (India), Curitiba (Brazil)
Renault: Clio 5	Bursa (Turkey), Novo Mesto (Slovenia)
Renault: ZOE	Flins (France)
Renault: Captur 2, Captur long	Valladolid (Spain), Curitiba (Brazil)
Renault: Logan	Casablanca (Morocco), Cordoba (Argentina), Curitiba (Brazil), Envigado (Colombia), Pitesti (Romania), Oran (Algeria)
Renault: Austral, Rafale	Palencia (Spain)
Renault: Koleos	Busan (South Korea) (RKM)
Renault: Duster 2, Duster 3	Curitiba (Brazil), Envigado (Colombia), Pitesti (Romania)
Renault: Lodgy	Tangier (Morocco)
Renault: Triber, Kiger	Chennai (India)
Renault: Dokker, Express Van	Cordoba (Argentina), Tangier (Morocco)
Renault: Arkana/XM3	Busan (South Korea)
Renault: Mégane 4, Mégane 4 Estate, Sedan C	Palencia (Spain), Bursa (Turkey)
Renault: Mégane electric	Douai (France)
Renault: Scenic	Douai (France)
Renault: Espace 5; Space 6	Douai (France), Palencia (Spain)
Renault: Talisman	Douai (France)
Renault: Kangoo, Kangoo ZE	Maubeuge (France)
Renault: Master, Master ZE	Batilly (France), Curitiba (Brazil)
Renault: Trafic, Trafic 2, Trafic ZE	Sandouville (France)
Renault: Alaskan	Cordoba (Argentina)
Renault: Kardian	Curitiba (Brazil)
Mobilize: Limo	Nanchang (China)
Dacia: Sandero, Logan	Pitesti (Romania), Tangier (Morocco), Casablanca (Morocco), Oran (Algeria)
Dacia: Duster, Jogger	Pitesti (Romania)
Dacia: Lodgy	Tangier (Morocco)
Dacia: Spring (K-ZE)	Shiyan (China)
RKM: Koleos/Talisman/ Arkana/XM3	Busan (South Korea)

Source: Renault Group

NEW VEHICLE OUTLETS FOR AUTOMOTIVE GROUPS

In 2023, outlets outside France for the Renault group, Stellantis (excluding FCA), and Renault Trucks represented 77% of their worldwide production, compared with 67% in 2000 and 60% in 1990. Deliveries of passenger cars rose by 4.8% in 2023, thanks to the recovery of the world market (+11%). Deliveries of commercial vehicles (light and heavy) are set to increase by 18% in 2023.

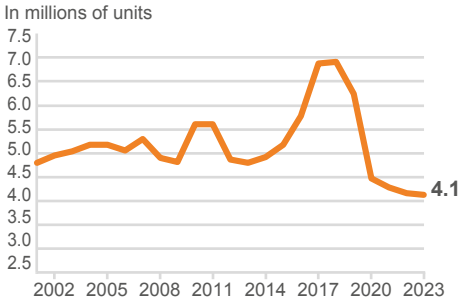
For all vehicles, the share of deliveries to the European Union has risen from 55% in 2022 to 57% in 2023. For passenger cars, deliveries to the EU rose from 54% in 2022 to 57% in 2023. For commercial vehicles, on the other hand, the weight of the EU has fallen by one point to 58% in 2023. With the addition of deliveries to the UK, the share to this zone now stands at 65% for passenger cars and 73% for commercial vehicles. Deliveries to the rest of Europe account for 78% of the total for passenger cars and 84% for commercial vehicles. The growing importance of Europe is essentially linked to deliveries to Turkey, which have risen from 7% in 2022 to 10% in 2023 for passenger cars, and from 5% to 8% for commercial vehicles.

While deliveries to other continents rose sharply between 2000 and 2017, they began to slow down before the COVID crisis and did not recover their previous levels after the crisis. In particular, the share of passenger car deliveries to Asia fell by 4 percentage points between 2022 and 2023, from 10% to 4%. Deliveries to America fell by one point to 11%.

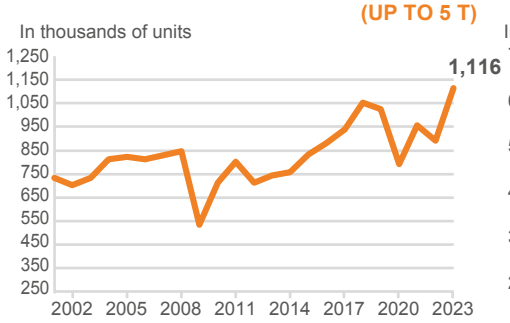
77% Share of Renault group, Stellantis (excl. FCA) and Renault Trucks sales outside France

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

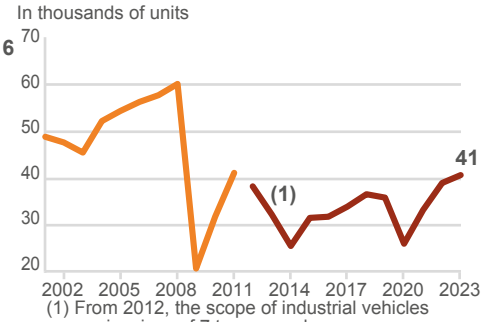
NEW PASSENGER CARS



NEW LIGHT COMMERCIAL VEHICLES (UP TO 5 T)



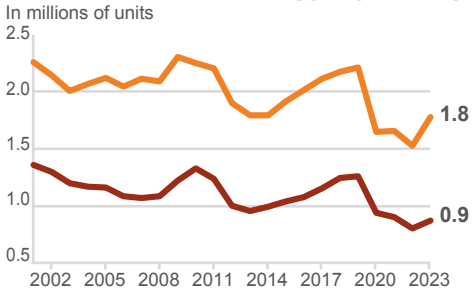
NEW INDUSTRIAL VEHICLES (OVER 5 T)



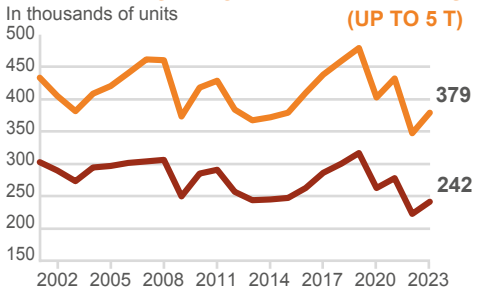
(1) From 2012, the scope of industrial vehicles covers invoices of 7 tonnes and more (see note page 82).

► VEHICLE REGISTRATIONS IN FRANCE

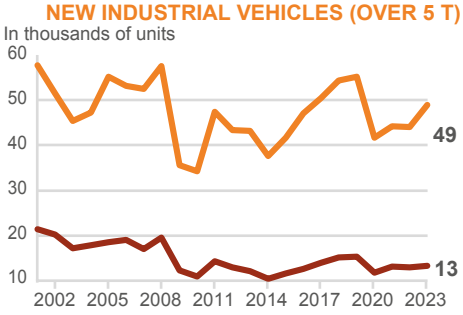
NEW PASSENGER CARS



NEW LIGHT COMMERCIAL VEHICLES (UP TO 5 T)



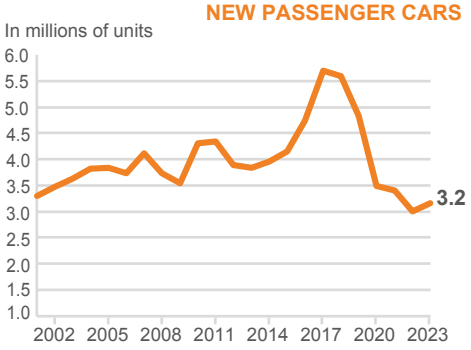
NEW INDUSTRIAL VEHICLES (OVER 5 T)



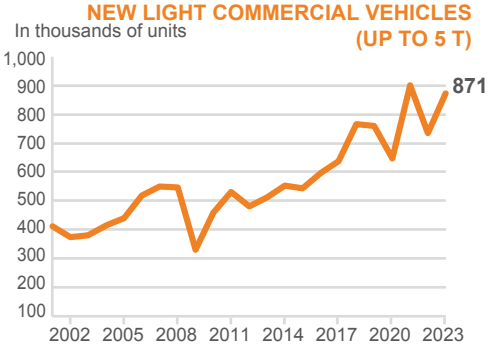
TOTAL — FRENCH GROUPS

► DELIVERIES OUTSIDE FRANCE

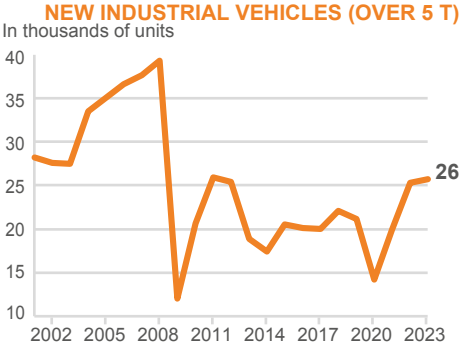
NEW PASSENGER CARS



NEW LIGHT COMMERCIAL VEHICLES (UP TO 5 T)



NEW INDUSTRIAL VEHICLES (OVER 5 T)



Source: CCFA

The Renault group and Stellantis (excluding FCA) have expanded their activities worldwide, following the opening and development of markets in emerging countries. As a result, the French market mechanically accounts for a smaller share of their sales than in the past. 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 figures stood at 2.2 million for the French market and 6.2 million cars produced by the two French groups. As a result of the health crisis, registrations in France have fallen to 1.8 million units and worldwide production by the Renault group and Stellantis (excluding FCA) to 4.1 million in 2023.

In 2023, deliveries of passenger cars outside France by the Renault group and Stellantis (excluding FCA) rose by 4.8% to 3.2 million units, following a 28% decline between 2019 and 2020. They are now below 18% their 2013 low point.

Deliveries of light commercial vehicles have also increased in 2023 (+18%), rising from 736,000 units in 2022 to 871,000 units. Lastly, deliveries of commercial vehicles increased by 1.5% in 2023, surpassing the 2019 delivery level to reach 25,700 units.

ECONOMIC RATIOS OF THE AUTOMOTIVE SECTOR IN FRANCE

Between 2012 and 2017, the added value per employee in 2015 euros in car manufacturing grew strongly, thanks to the improved health of the European markets, the productivity efforts of the manufacturers, as well as the higher average unit value of the vehicles produced (increase in the share of LCVs and high-end vehicles in French production). The health crisis brought activity to a sudden halt in 2020, resulting in a drop of almost 25% in added value. In 2021 and 2022, this has risen again (+28% over 2 years) and is now almost back to the level of 2019. This level is higher than in the manufacturing industry, where the value per employee is €92,000, compared to €109,000 in car manufacturing and €77,000 in the manufacture of automotive equipment.

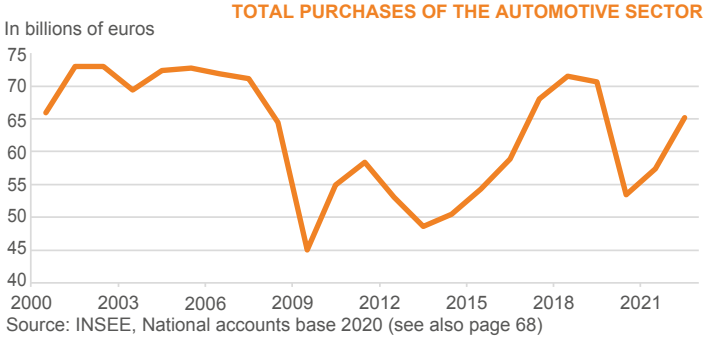
As for the workforce, it continues to decline on a downward trend. In 2020, the short time working support and assistance schemes put in place during the crisis had mitigated the impact of the drop in production.

The proportion of sales exported is around 60%, compared with an average of 40% in the industry manufacturing and 50% in automotive equipment manufacturing.

At the crossroads of many different techniques, the automotive industry requires significant investment: since the 2009 crisis, the automotive industry has been devoting an average of 2% of its turnover to it every year. This ratio declined in 2021 in a context of uncertainty, energy transition and optimisation. It stabilised in 2022 at 1.8% of turnover. The automotive industry thus accounts for 6.6% of total manufacturing industry investment.

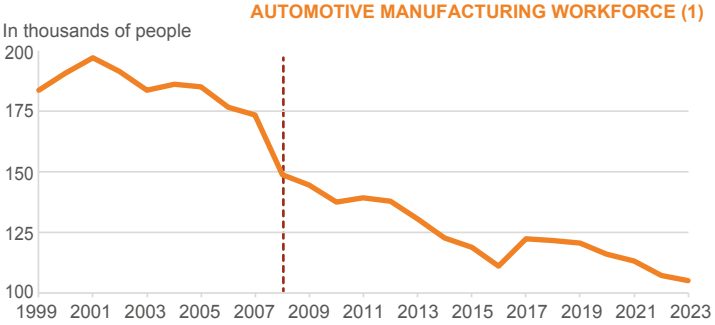
Finally, the automotive sector has a major impact on other branches, particularly through the purchases it makes. Total purchases by the automotive branch amounted to €65 billion in 2022, of which almost half (44%) were made from other branches (electrical, electronic and IT equipment; tertiary sector; etc.).

TOTAL PURCHASES OF THE AUTOMOTIVE SECTOR

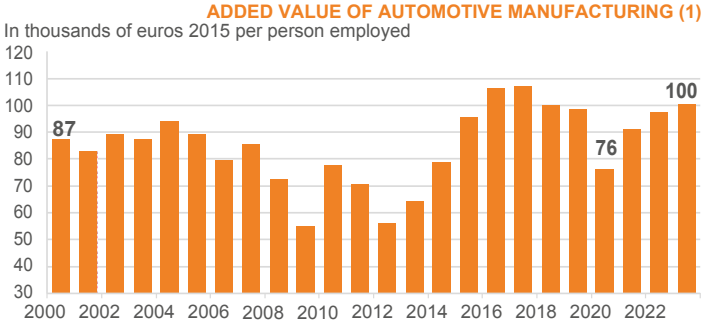


Source: INSEE, National accounts base 2020 (see also page 68)

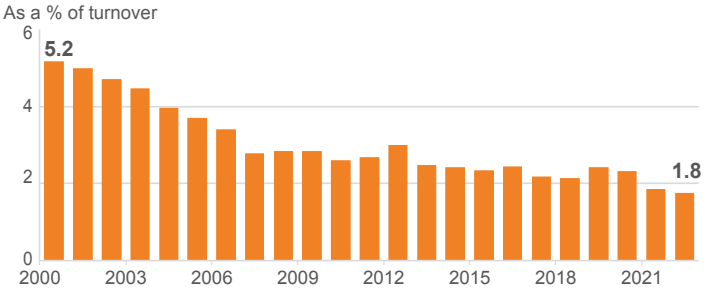
AUTOMOTIVE MANUFACTURING WORKFORCE (1)



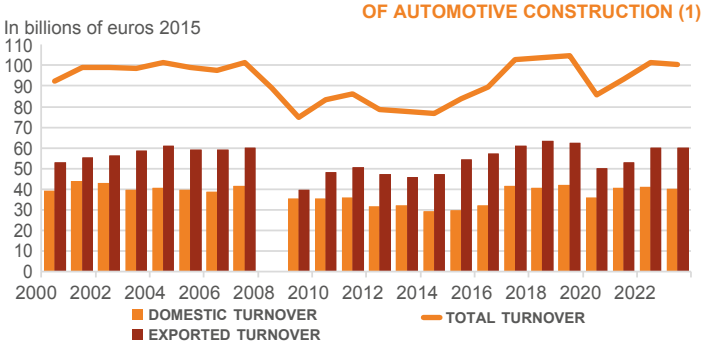
ADDED VALUE OF AUTOMOTIVE MANUFACTURING (1)



INVESTMENTS IN AUTOMOTIVE MANUFACTURING



DOMESTIC TURNOVER AND EXPORT TURNOVER OF AUTOMOTIVE CONSTRUCTION (1)



(1) CCFA estimates for 2023: see also pages 88 and 89.
Source: SESSI, INSEE from 2008

INSEE produces annual business surveys, one of the main sources of information on French industry. The data provided by these surveys correspond to survey results for N-2, with data for N-1 estimated by the CCFA. These surveys have undergone a major overhaul, with the introduction of the new ESANE information system and a new economic activity nomenclature in early 2008 (see pages 88 and 89).

The automotive industry includes companies whose main activity is the manufacture of motor vehicles, car bodies, caravans and recreational vehicles, as well as upstream manufacturing of automotive equipment. However, certain products, such as tires, plastics, capital goods and glass, are not included in this classification, as they appear in other activity nomenclatures (see page 69).

After 2004, in line with the increase in vehicle production, the added value (excluding tax) of car manufacturing, in constant euros and per employee, decreased under the impact of various factors: costs related to new environmental standards, stagnation, and then the collapse of the Western European automotive markets. Then, from 2013, it increased again and has almost doubled in 7 years. To develop new models and optimise production capacity, the automotive industry has devoted an average of 2% of its turnover to investment, i.e. more than €2 billion per year. In addition to these tangible investments, there are intangible investments that are not included in these figures (see page 34 on research and development expenditure).

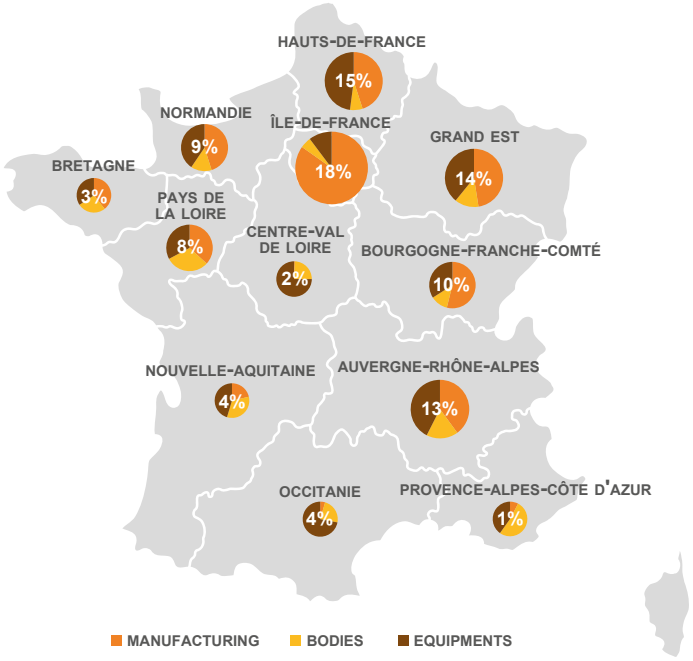
The automotive industry's share of export sales has risen steadily since 1990, when it stood at 38%, and is now hovering around 60%, compared with 40% for the industry.

THE AUTOMOTIVE INDUSTRY IN THE REGIONS

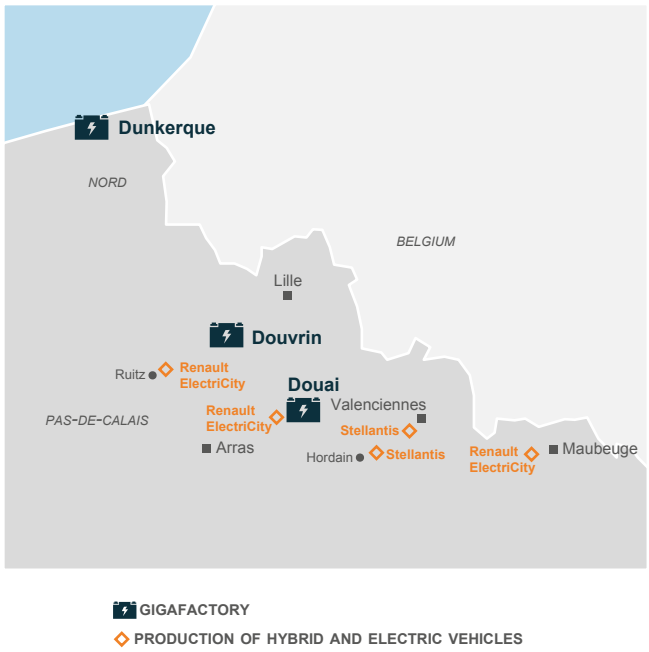
The automotive industry is often a key pillar of a region's economy thanks to the jobs it creates. It has a significant presence in several French regions, particularly in the north and east, and has a powerful knock-on effect on the rest of the economy. Even if the direct workforce of the automotive industry has decreased over the last twenty years, with a significant economic impact at the local level, investment projects related to the ecological transition should support employment and the economy of the regions concerned. The Regional Automotive Industry Associations (ARIA), in close collaboration with the competitiveness clusters, bring together the companies in the sector in the region and, together with the public authorities and educational and research establishments, carry out actions specific to the regional sector (development of innovation and R&D, promotion of the sector and the region, 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 AUTOMOTIVE INDUSTRY WORKFORCE IN 2023 AND THE DISTRIBUTION OF JOBS BY ACTIVITY



THE "BATTERY VALLEY" IN HAUTS-DE-FRANCE



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

Sectors	Agriculture	Agri-food products	Capital goods	Automobile	Aerospace construction	Other transport equipment (excluding aeronautics)	Other industrial products	Energy, 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 - Economic report - March 2012

The automotive sector is the second sector, behind aeronautics, with the highest added value multiplier. According to INSEE, one unit of added value in the automotive sector generated 4.1 units of added value in the national economy. Other INSEE regional studies have shown the impact of the automotive industry on direct employment (manufacturers' production and research sites), but also on indirect employment (staff employed by suppliers, subcontractors and service providers) and induced employment, which is that necessary to satisfy the consumption of employees (direct and indirect) and their families. In Franche-Comté[1], for example, the 11,800 direct jobs generated 2,400 indirect jobs and 6,200 induced jobs.

The number of people employed in the automotive industry has fallen, but it remains an important sector in several regions. According to data from URSSAF, which is based on the activity codes of establishments, Île-de-France is the region with the highest number of salaried jobs today (18% of the total in 2023). 85% of the salaried workforce is in construction and 10% in equipment, with the rest in bodywork. A study published by INSEE in 2020[2] indicates that the broader automotive sector, which includes manufacturing, trade and maintenance/repair, employs up to 110,000 people in the Seine Valley (western departments of Île-de-France + coastal or Seine-crossing departments in Normandy). 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). In addition, changes in the sector are also accompanied by a refocusing of tertiary activities in the region (Poissy) and the development of new activities (reconditioning of used vehicles, retrofitting, recycling and battery management in Flins, production of electric motors in Cléon).

The sector also has a strong presence 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[3] by estimated that there were 56,000 direct and indirect jobs in the regional automotive industry, including 15,400 in automotive manufacturing, 15,000 in automotive equipment manufacturing and 26,300 in the supply of materials, intermediate products and services. More recently, the region has been chosen to host France's four largest battery plant projects (ACC in Douvrin, Verkor in Dunkirk and Envision in Douai, etc.), which should make it "Europe's battery valley" and compensate for the decline in the workforce due to the shutdown of combustion engines. These new plants should be operational at full capacity before 2030, creating an estimated 10,000 to new jobs 20,000 direct and indirect.

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

In the Burgundy-Franche-Comté region, the automotive sector employed 42,340 people in 2020[4], including 10,740 in car manufacturing, 14,220 in the manufacture of automotive equipment, 11,710 in the manufacture of intermediate goods, 2,010 in intra-sector trade, 1,780 in research, design and analysis, 1000 in the manufacture of capital goods and 880 in transport and logistics.

Other automotive-related investments, at different levels of the value chain, are also underway or expected in the coming years. These include recycling plants for electric car batteries, lithium extraction projects, and several hydrogen projects (vehicle conversion, fuel tank and fuel cell manufacture, hydrogen production). These projects, in conjunction with manufacturers, represent billions of euros of investment, as well as the creation of thousands of direct and indirect jobs

[1]L'essentiel No. 113, INSEE Franche-Comté, May 2009
[2]Panorama de l'industrie dans la Vallée de la Seine, INSEE Normandie, November 2020
[3]Horizon éco No. 290, ARIA Hauts de France, October 2019
[4]Insee Analyses Bourgogne-Franche-Comté, May 2024

COMPETITIVENESS FACTORS IN THE FRENCH AUTOMOTIVE INDUSTRY

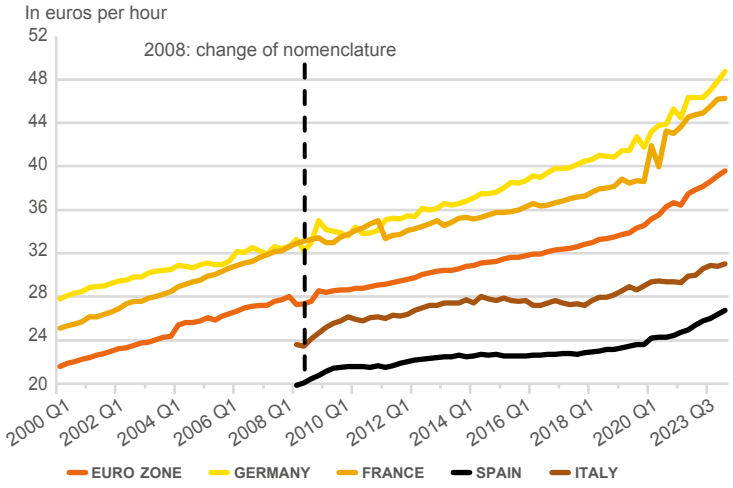
In a highly competitive global market, car manufacturers must be competitive in their country of origin and face factors common to the entire industry. These include wage costs, the burden of statutory deductions from production factors, the exchange rate and energy prices. Others are specific to the automotive sector, such as the opening of the core market to competition. All these factors weigh on profit margins (the ratio between gross operating surplus and gross value added) and impact on the ability of companies to invest in production, product development, research and development in energy transition, digital technology and new forms of mobility.

In France, since the 2000s, the competitiveness of manufacturers has deteriorated. After the 2008 crisis, the government tried to implement policies promoting competitiveness; manufacturers, for their part, also pulled out all the internal stops to develop their business and maintain industrial and research sites in France. All these actions have had results, but French industry remains less economically competitive than its European neighbours. Production taxes, which are those related to production activity, regardless of the quantity or value of the goods and services produced or sold, remain at a higher level than in other countries. In 2023, although down 0.4 points compared to 2020, they represented 3.1% of GDP in France, compared to 1.7% in Italy, 1.2% in Spain and 0.7% in Germany, according to Eurostat.

In 2022, the conflict in Ukraine caused a sharp rise in energy prices (gas, electricity), which affected companies in the automotive sector, some of which consume significant amounts of energy in their production processes (steel, chemicals, plastics, mechanics). In Europe, governments have adopted aid policies designed to reduce the impact of these sharp increases. Nevertheless, this has resulted in new gaps in competitiveness within Europe and even more so with countries such as China, where energy prices are lower.

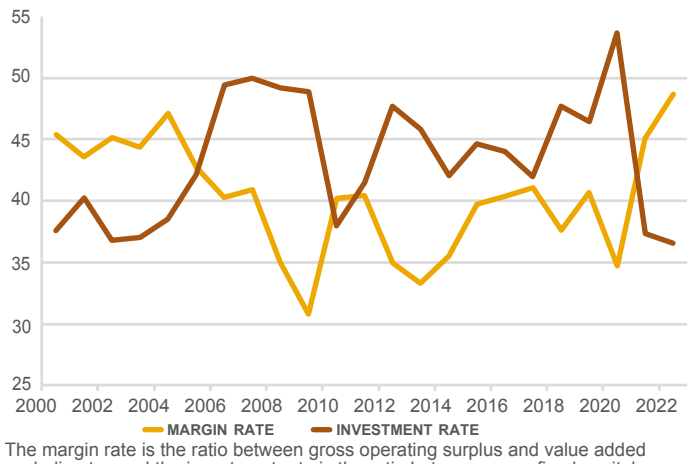
With the health crisis of 2020, the profit margin of companies was strongly affected, falling to 35% for the automotive sector, compared to 41% in 2019. Then, this ratio recovered in 2021 and 2022 to reach 48.7%, according to the latest figures from the national accounts, now expressed on a 2020 basis. The sector's investment has been revised downwards in the new 2020 base, mainly due to the cash flows generated using software or database hosting, which are recorded as intermediate consumption. In the new base, the investment rate falls sharply in 2021 and 2022, to 37%, compared with 54% in 2020.

LABOUR COSTS IN MANUFACTURING
Results of the quadrennial ECMO surveys and extrapolation from the quarterly labor cost index



Source: Eurostat, Rexecode calculation

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



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 2020)

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

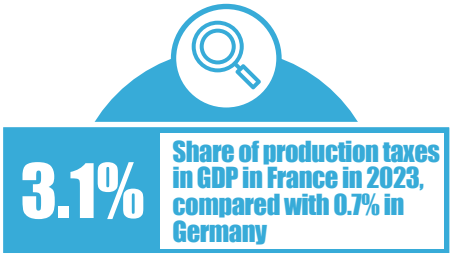
The French automotive industry must ensure a performance comparable to that of its global competitors to continue to develop. Among the factors affecting the competitiveness of French industry are wage costs, which are linked to the weight of social security contributions on the labour factor and which 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 a 50% reduction in the company value-added contribution (CVAE) and the business property contribution (CFE), and a reduction from 3% to 2% in the ceiling rate of the territorial economic contribution (CET) based on value added.

Nevertheless, the burden of social security contributions 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 lower segment of the range is no longer profitable, particularly in comparison with countries such as Spain.

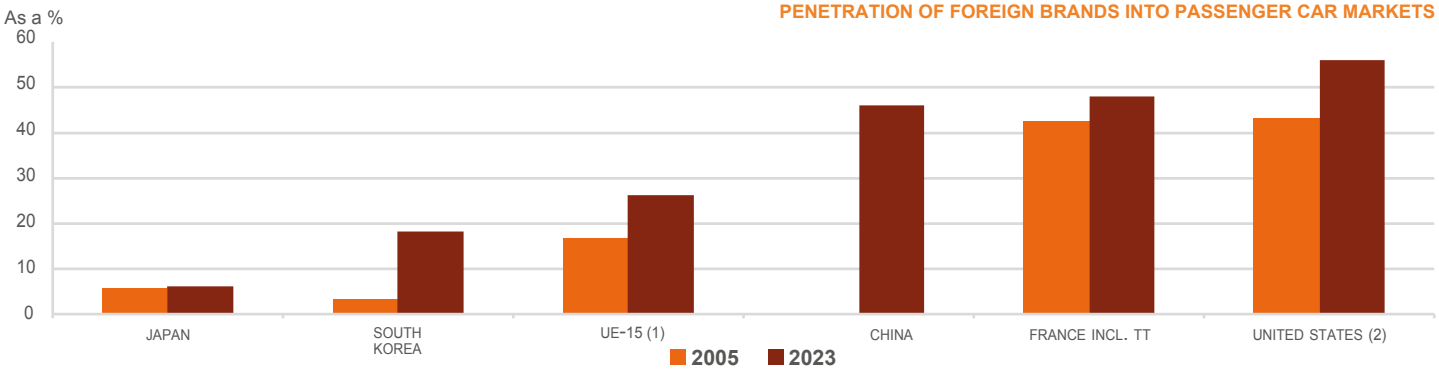
Exchange rate fluctuations are another important factor in the competitiveness of car manufacturers due to the significant and growing share of production outside the euro zone. The latter accounted for 60% of external sales for passenger cars in 2023, compared with 47% in 2002. In 2023, despite a slight increase compared to 2022, the euro will remain on average at a lower level than between 2009 and 2014 compared to the dollar, slightly improving this competitiveness factor.

Finally, there are factors related to the openness of the market, whether domestic or foreign. In general, the domestic market, known as the 'base market', is a solid pillar that, through international development and innovation, feeds growth in foreign markets. For the French automotive industry, the French market, and especially the European market, constitute this base market; it is open to competition and non-European manufacturers occupy a significant and constantly growing share of it. In other car manufacturing countries such as Japan, South Korea and China, market access is more difficult and local manufacturers therefore have a more extensive base market on which to base their international development. Furthermore, Chinese manufacturers now have a growing market share (54% in 2023 compared to 40% in 2019) in their domestic market, which is the world's largest market, and even more so in the case of electric cars.



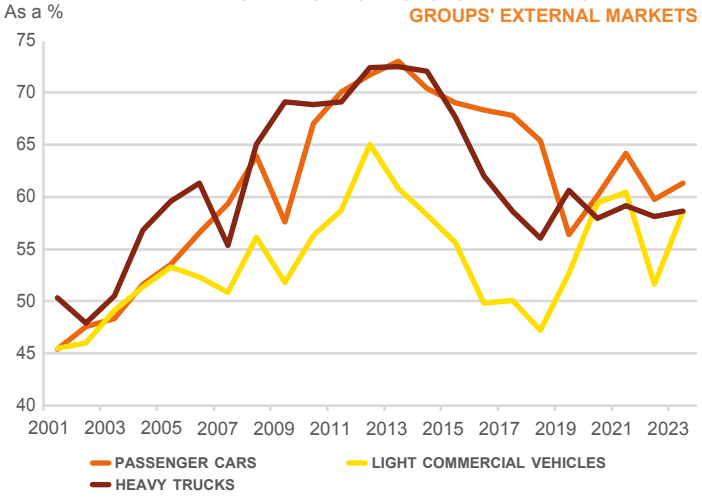
COMPETITIVENESS FACTORS IN THE FRENCH AUTOMOTIVE INDUSTRY

PENETRATION OF FOREIGN BRANDS INTO PASSENGER CAR MARKETS



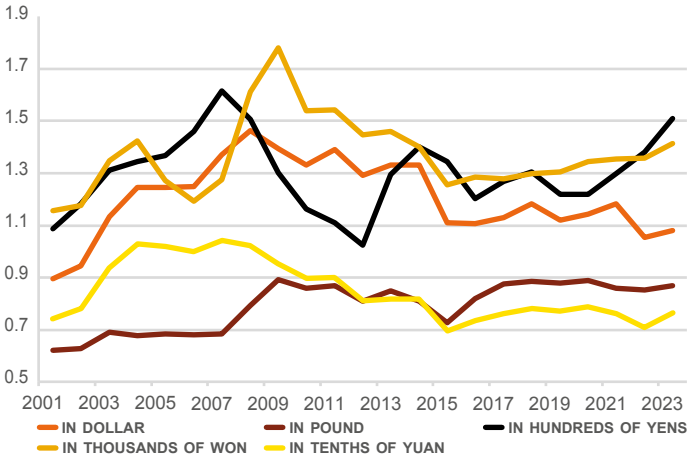
(1) Considered foreign brands are Japanese and Korean brands, Indian brands from 2014, Chinese brands and Tesla from 2022.
(2) Penetration of foreign brands calculated on light vehicles. Chrysler, Dodge, Ram and Jeep brands are not considered foreign brands.
Source: CCFA

SHARE OF NON-EUROZONE MARKETS IN FRENCH GROUPS' EXTERNAL MARKETS



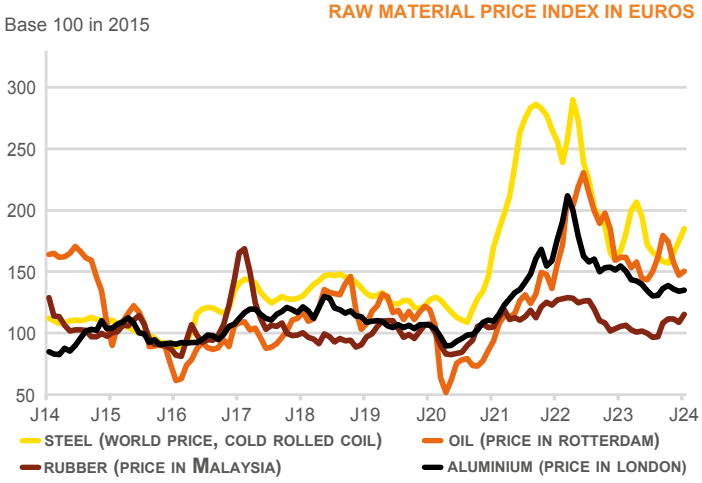
Source: CCFA

EVOLUTION OF EXCHANGE RATES: FOR ONE EURO



Source: BCE

RAW MATERIAL PRICE INDEX IN EUROS



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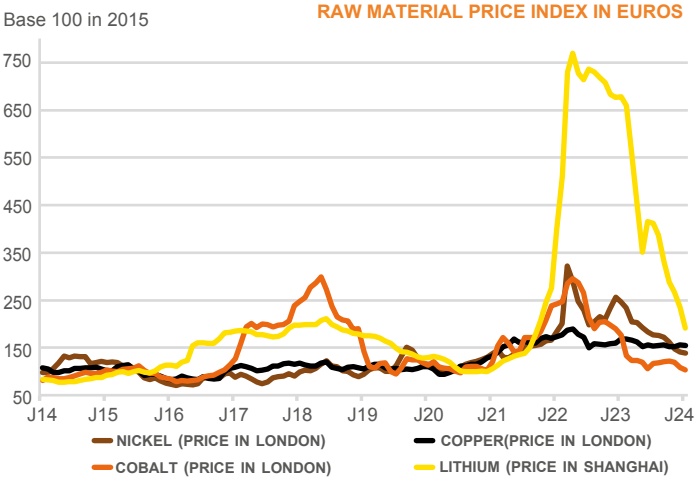


Sources: Rexecode, Insee, CCFA calculations

+46 % Average copper price increase between 2019 and 2023

The prices of raw materials, but also of energy, can impact the production costs of user companies. These prices fluctuate significantly, even within the same year. Expressed in euros, raw material prices rose significantly from 2001 to 2012. Prices then hit a low point until the post-covid recovery, which brought raw material prices to very high levels. Passing on these price fluctuations in final sales prices is always difficult in a context of intense competition and consumer arbitrage within households.

In 2021 and 2022, the main raw materials used in the automotive industry, such as steel and aluminium, experienced sharp price increases in connection with the post-Covid recovery. In 2023, the price of most raw materials is trending downwards, in line with the slowdown in global demand, particularly in China, and the decline in inflation. However, this decline does not allow a return to pre-health crisis price levels. For steel and aluminium, for example, prices remain 39% and 30% higher respectively compared to 2019.

With the development of electric vehicles, the demand for new raw materials such as copper, cobalt, nickel and lithium is increasing and their average prices are rising significantly, even if we are seeing a slowdown in demand and prices in 2023.

Energy prices (gas, electricity) vary from one area to another: in 2022, they were much higher in Europe due to the conflict in Ukraine than in other car manufacturing areas such as the United States or China. According to Rexecode's work, electricity prices in Europe in 2022 (expressed in dollars/MWh) are almost 2.5 times higher than in the United States and 3 times higher than in China. For natural gas, the price is three times higher in Europe than in the United States.

THE CONSOLIDATION OF THE AUTOMOTIVE INDUSTRY

2023 New strategic industry contract 2023-2027

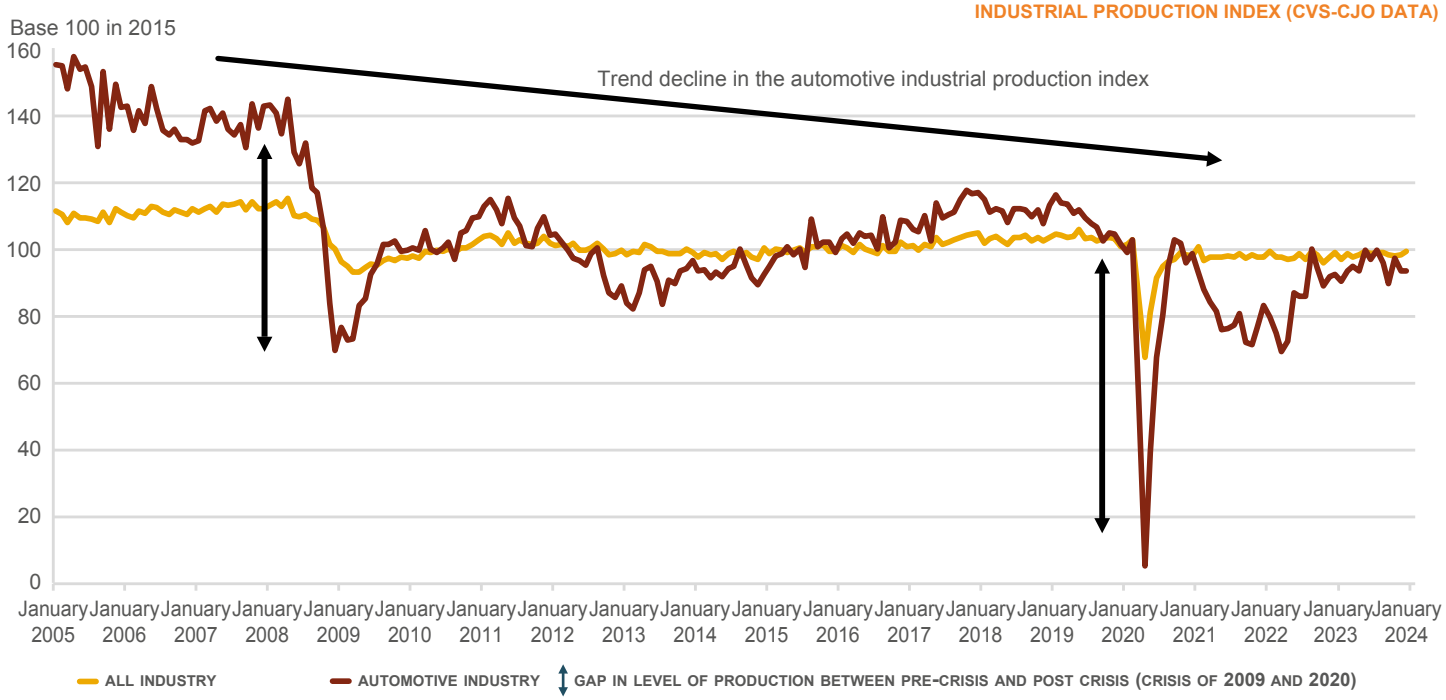
Over the last fifteen years, the automotive industry has had to consolidate in the face of several types of events. The first was the 2008-2009 crisis, which severely affected European markets and production in France. The INSEE automotive industry production index (IPI) fell by an annual average of 25% in 2009 (-12% for industry as a whole). After a recovery, it fell again in 2013, before finally growing steadily until 2018. This growth was interrupted in 2020 with the health crisis, which resulted in a drop in the IPI of the automotive industry of 28% on an annual average, compared to 10% for the industry. After a post-Covid rebound in the second half of 2020, car production fell again with the semiconductor crisis and tensions over raw materials, and did not recover until the second half of 2022. In 2023, as part of the move towards electrification, activity picked up, but remained 13% down on pre-crisis levels, compared with -5% for the industry.

In this difficult economic climate, the sector is having to deal with major disruptions (technological, digital and societal) that 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 combustion vehicles and invest in new products, training the workforce in future technologies, in a relatively short time frame (European objective of 100% reduction of CO_2 at the exhaust in 2035).

From 2009, the automotive industry was structured around the Automotive Industry Platform (PFA), established by the French automotive groups and their suppliers, brought together within the Liaison Committee of Automotive Suppliers (CLIFA). Since 2010, the PFA has been supported at regional level by the Regional Automotive Industry Associations (ARIA), as well as by the competitiveness clusters. It 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 programmes.

The Strategic Committee for the Automotive Sector (CSF) was set up within the framework of the National Industry Council (CNI). It brings together the entire sector, from upstream to downstream, including employee unions and major research organisations. After an initial roadmap was signed for the period 2018-2022, a new strategic sector contract (CSF Auto) was signed for the period 2023-2027. It takes up the ambitious objectives set by European regulations but also by the government (ecological planning via the SGPE) for the energy transition of road transport, with energy mix targets for 2027 concerning private vehicles, commercial vehicles and industrial vehicles (trucks, buses and coaches).

INDUSTRIAL PRODUCTION INDEX (CVS-CJO DATA)



Source: INSEE

The financial and economic crisis of 2009 had significant repercussions on the automotive sector from top to bottom (contraction of activity, loss of competitiveness, weakening of the industrial fabric), which led it to organise itself around the PFA to strengthen synergies. The successive crises of recent years (COVID, semiconductors, war in Ukraine) and the acceleration of the sector's energy and digital transition are creating new challenges for the industry (objectives of reducing the carbon footprint, competition from new entrants, control of value chains, cost of energy and raw materials).

In this context, a new sector contract has been signed for the period 2023-2027. It identifies several structuring projects to which the players in the sector, the State and the regions have committed, in order to achieve the objectives of carbon neutrality by 2050. These projects are structured around major issues such as increasing competitiveness and innovation to create value in France. They also aim to enhance the attractiveness of the sector, develop skills and anticipate the retraining of employees in the regions. The issues of energy sovereignty and critical materials and semiconductors are also central to the competitiveness of France and Europe in the face of Asian competition. Finally, the development of the circular economy and the decarbonisation of the fleet are also major levers for achieving the objectives of reducing the carbon footprint of transport.

These structuring projects, which are part of the new sectoral contract, are intended to be rolled out in the regions, with the mobilisation of the automotive and mobility competitiveness clusters and the ARIA (regional mobility and transport agencies), in close collaboration with the regional councils and the State services. They are part of the dynamics of phase 5 of the competitiveness clusters, which support the companies and employees of the sector in the profound transformation that is underway.

INVESTMENT AID AND SUPPORT FOR THE SECTOR

The automotive industry requires significant physical investment (production sites, etc.) which is amortised over long periods. During their design and before they are marketed, vehicles also require work over several years, in research centres, as part of a process of continuous progress, to meet societal demands, whether they relate to safety, the environment (decarbonisation of transport) or new challenges related to digital technology (autonomous and connected cars) and new mobility services. The automotive industry is therefore a capital-intensive industry with significant financing needs. These are more difficult to mobilise in times of crisis or transition and require support mechanisms, particularly from the public authorities.

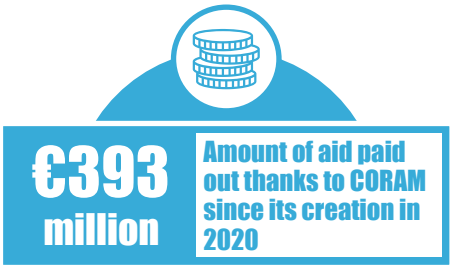
One of the first measures to support research and development and innovation was the introduction of the Research Tax Credit (Crédit Impôt Recherche, CIR) in 1983. This tax measure is intended to support companies in their R&D efforts and thus helps to make up the deficit in tax and social competitiveness of France compared to other major countries in which manufacturers are present. It was supplemented in 2013 by the innovation tax credit (CII) for SMEs. In 2021, 6.4% of the research tax credit went to the automotive industry and 1.4% to innovation.

Following the 2009 financial crisis, the public authorities also introduced structural instruments to promote long-term financing, including the creation of the Automotive Equipment Manufacturers Modernisation Fund, which became the Automotive Future Fund (FAA) in 2015. Financed by the major players in the sector and managed by Bpifrance, it aims to accelerate the growth and innovation capacity of French automotive subcontractors. Endowed with €525 million over 15 years, it has been increased to €600 million as part of the automotive recovery plan.

During the COVID crisis in 2020, the government implemented an economic recovery plan called 'France Relaunch' based on three pillars: 'ecology and energy transition' (hydrogen, decarbonisation), 'business competitiveness' and 'territorial cohesion'. In this context, measures to support the automotive industry have been proposed to assist it in its changes, as well as aid (government-guaranteed loans, reduction in production taxes) to help it face the consequences of the pandemic. This plan has been supplemented by other measures, such as calls for automotive-related projects, or investment aid as part of the Investments for the Future Programmes.

In 2021, the government launched a new investment plan, 'France 2030', to help France catch up in certain industrial sectors. This plan provides for public aid to support R&D and innovation and to support stakeholders facing changes in the automotive sector. It includes calls for projects, including those of CORAM (Steering Committee for Automotive Research and Mobility). This committee, established in 2020 and renewed in 2021 and 2022, has made it possible to support, since its launch, 60 projects identified as priorities within the sector, thanks to €393 million in aid for €1.2 billion in investments.

On 24 October 2023, as part of the 'France 2030' programme, the government announced the extension and expansion of existing measures aimed at the automotive industry and, more specifically, at subcontractors. It includes a new call for 'CORAM' projects for 2024, as well as other schemes to support the industrialisation and modernisation of subcontractors' industrial facilities (new call for proposals to support investment, intensive support scheme for SMEs, etc.). Support measures for the training and retraining of employees of subcontracting companies are also being renewed.



► INVESTMENT AND SUPPORT FUNDS FOR THE AUTOMOTIVE INDUSTRY

	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 5 years. 80% of the Fund, or up to €420 million, will be invested in around fifteen subcontracting groups, while the remaining 20%, or up to €105 million, will be invested in funds of funds (private investments and complementary to FAA 2).
Support and retraining fund for employees in the automotive sector	Set up on June 17, 2021 and intended to finance exceptional support and professional retraining actions for economically redundant 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 have been entrusted, on behalf of the State, to Pôle Emploi. Its extension was approved in June 2023 in order to allow the entry of employees of new companies until June 2024.
AMI CORAM 2022-2023 (Call for expressions of interest within the framework of CORAM)	Subsidies and advances of 30% to 70% (depending on the size of the company and on the use) of the investment amount for R&D projects that are part of the roadmap of the Automotive and Mobility Research Steering Committee (electric vehicles, hydrogen, innovative materials, circular economy, connected and autonomous vehicles)

Source: Bpifrance

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 lines of funding have been announced. The first, the Fonds Avenir Automobile 2, increased to €600 million, is dedicated to subcontractors, in line with the FMEA, and aims to provide new investment capacity, in equity and quasi-equity, to help them face the crisis and accelerate their capacity for innovation in the key technologies of the connected and decarbonised car of the future. The second major scheme is the Call for Expressions of Interest, which is part of the fourth Investments for the Future Programme (PIA4) and aims to support projects selected under CORAM. These schemes are also part of the 'France 2030' programme launched in 2021.

In 2023, the 'CORAM 2022' call for projects resulted in the selection of 11 winners totalling €115 million in research and development investments, including €44 million in state aid, to support research and innovation projects related to various technologies and services (electric vehicles and their 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). The call for projects (AAP) has been renewed for 2024 (CORAM 2024) to support industrial research and experimental development projects, with a particular focus on collaborative projects between contractors and subcontractors.

The France 2030 automotive investment support call for projects is also being renewed in 2024 to support projects in France for the industrialisation of components dedicated to the vehicles of the future and the modernisation of subcontractors' industrial facilities (€577 million investment, including €100 million in public aid delivered to 49 winners). In addition, a specific section of the Invest Call for Projects (CFP) is also dedicated to projects for decarbonisation and improving the environmental performance of sites and products.

To help subcontractors better understand the challenges and opportunities of the vehicle of the future, a new 24-month 'Accelerator' programme of intensive support is also being offered in 2024 to SMEs that are growing or highly exposed to changes in the sector.

Finally, to support employees, a new Call for Expressions of Interest in 'Skills and Professions of the Future' (CMA) has been launched to develop employment and skills in order to meet the major challenges of tomorrow. In addition, the exceptional fund for the support and retraining of employees made redundant for economic reasons by subcontractors in difficulty has been extended until 30 June 2024.

RESEARCH AND DEVELOPMENT EXPENDITURE IN THE AUTOMOTIVE SECTOR

€5.7 billion — **Amount of internal and external research and development expenditure in the automotive sector in 2022**

In 2022, the automotive industry was the second largest sector in terms of domestic research and development expenditure (DIRDE) among companies in France, behind scientific and technical activities, but ahead of aeronautics and space construction.

This innovation expenditure amounted to €4.2 billion, or 11% of all business expenditure on research and development. Affected by the health crisis, it had fallen in 2020 and 2021 but increased by 7% in 2022. External research and development expenditure (ERD), which had fallen by 40% between 2019 and 2020, increased by 9% in 2022 to €1.4 billion, which is still well below pre-crisis levels. It represents 11% of all ERD by companies.

Manufacturers must invest heavily, not only to satisfy customers and comply with regulatory standards, but also to achieve the objectives related to the energy transition, particularly in terms of electrification, and to develop mobility and connectivity services. From 2015, total R&D expenditure increased steadily to reach €7 billion in 2019. Over the last five years, the sector has invested €30 billion in innovation, including €22 billion in R&D, which also has a knock-on effect on its suppliers, such as plastics and electronics companies, etc.

The 2009 crisis had significantly limited the financial resources of companies, yet domestic research and development (R&D) spending had fallen by only 2% in 2009 and 2010, underlining its vital and long-term nature. With the 2020 crisis, the decline in spending was more significant, with the discontinuation of certain programmes related to combustion vehicles, in the context of a ban on these vehicles by 2035. However, in 2022, spending is on the rise again with the need for investment in vehicle electrification and connectivity. The automotive industry remains the sector that files the highest number of patents, and the manufacturers Renault and Stellantis are among the top patent filers.

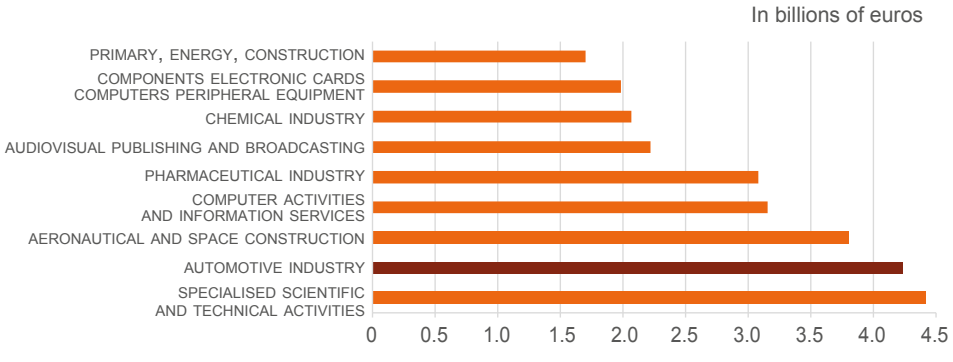
In Europe, the automotive sector is also the one that spends the most on research and development, with, according to ACEA figures, €73 billion spent in 2022, or one third of the EU's total R&D expenditure.

► DISTRIBUTION OF COMPANIES' RESEARCH AND DEVELOPMENT BUDGETS IN THE MAIN RESEARCH BRANCHES (1)

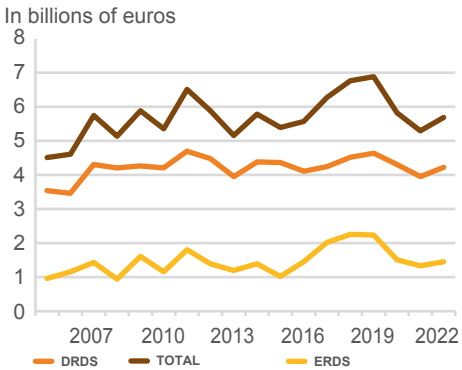
	DRDS in 2022 (2)		ERDS (3) in 2022	
	in millions of euros	as a % of total	in millions of euros	as a % of total
Specialised scientific and technical activities	4,413	11%	829	6%
Automotive industry	**4,234**	**11%**	**1,449**	**11%**
Aeronautics and space construction	3,802	10%	3,941	29%
Computer activities and information services	3,155	8%	261	2%
Pharmaceutical industry	3,079	8%	2,290	17%
Audiovisual publishing and broadcasting	2,220	6%	333	2%
Chemical industry	2,066	5%	477	4%
Components electronic cards computers peripheral equipment	1,986	5%	216	2%
Primary, energy, construction	1,700	4%	393	3%
Manufacture of electrical equipment	1,675	4%	519	4%
Manufacture of instruments and devices for measuring, testing and navigation watchmaking	1,642	4%	234	2%
Manufacture of machines and equipment not included elsewhere	1,409	4%	259	2%
Manufacture of telecommunications equipment	1,177	3%	91	1%
Other branches	6,407	16%	2,326	17%
TOTAL	**38,965**	**100%**	**13,619**	**100%**

(1) Semi-final data.
(2) DRDS: Domestic research and development expenditure.
(3) ERDS: External research and development expenditure.
Source: Ministry of Higher Education, Research and Innovation (MESR DGESIP-DGRI SIES)

DOMESTIC RESEARCH AND DEVELOPMENT EXPENDITURE BY COMPANIES IN FRANCE IN 2022 IN THE MAIN RESEARCH BRANCHES



EVOLUTION OF RESEARCH AND DEVELOPMENT EXPENDITURE IN THE AUTOMOTIVE INDUSTRY



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

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

In 2022, automotive companies based in France employed 25,246 people in full-time equivalent positions in R&D (including 17,600 researchers). These numbers have decreased by 23% compared to 2003, but the number of researchers has increased by 28% over the same period. On the other hand, since the COVID crisis, the number of researchers has decreased by 12% (and by 18% for the total R&D workforce).

According to the French National Institute of Industrial Property (INPI), Stellantis was the leading patent applicant in 2023, with the Renault group in sixth place. In total, four companies in the automotive sector were among the top ten patent applicants in 2023.

AUTOMOTIVE COMPETITIVENESS CLUSTERS IN FRANCE

Initiated by the State and local authorities in 2005, competitiveness clusters bring together companies (large groups and SMEs/mid-caps), research units and training centres in a clearly identified area and around a targeted theme, with a view to collaborative projects. Their role is to boost the competitiveness of the French economy by emphasising its capacity for innovation and encouraging its anchoring and structuring in their regions. Several studies have shown their impact on companies' R&D expenditure: one euro of public subsidy received under this policy is estimated to have generated an average of 2.5 euros of additional R&D expenditure by the beneficiary SMEs. Beyond the research aspect, the competitiveness clusters stimulate business exports and boost employment.

The call for applications for phase V of the clusters (2023-2026), launched on 2 August 2022, resulted in the labelling of 55 clusters in March 2023, including the four automotive clusters. This new phase has three objectives: to promote connections and collaborations between the players in the regional economic and industrial ecosystems, in line with regional priorities; to expand the markets and networks of SMEs through the clusters' actions at European level; to 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 a view to improving the competitiveness of their members. They are associate members of the structure of the automotive sector: the PFA, Filière Automobile et Mobilités.

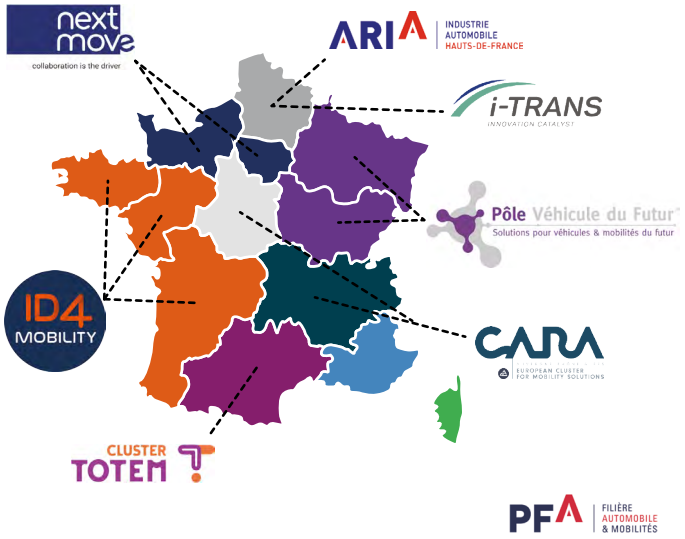
1,900 Projects labelled by automotive competitiveness clusters since their creation

► THE MAIN AUTOMOTIVE COMPETITIVENESS CLUSTERS IN FRANCE

	Next Move	Véhicule du Futur	CARA (1)	ID4MOBILITY (2)
Number of members	655	500	432	463
Number of labeled projects	632	535	334	400
Number of funded projects	320	284	189	-
Year of creation	2006	2005	2005	2006
Total amount of funded projects (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 join the 270 CARA members.
(2) ID4CAR becomes ID4MOBILITY.

► THE NETWORK OF AUTOMOTIVE COMPETITIVENESS CLUSTERS AND ARIA IN FRANCE



In 2023, the automotive industry continued its research and development efforts through the clusters. Within these, it is mobilised to meet the challenges of industrial excellence and sustainable mobility. The action is cross-disciplinary and brings together manufacturers, equipment suppliers, innovative SMEs/mid-caps, research laboratories and training organisations, including universities.

The NextMove cluster (formerly Mov'eo), created in 2006, brings together the main players in the automotive and mobility industry. It covers 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 leads and represents 'Mobility Valley', a territory of European excellence where solutions to meet the challenges of future mobility are invented, developed, tested and industrialised. During Phase V, NextMove's mission is to consolidate the European dimension of its action and to respond to the innovation challenges of the sector and national (France 2030), regional and European policies.

The Vehicle of the Future cluster, historically based in Alsace and Franche-Comté, now covers the entire territory of the Grand Est and Bourgogne-Franche-Comté cluster. The cluster supports companies in their efforts to break into new mobility markets and the industry of the future, with the aim of stimulating innovation, improving business performance, helping teams to develop their skills and supporting companies in their development and growth. In phase V, the cluster will adapt regional and national policies to the following themes: decarbonisation and the green transition, hydrogen, electrification and industry 4.0.

The aim of the CARA cluster is to support changes in passenger and goods transport systems in the Auvergne-Rhône-Alpes region. It supports six sectors: industrial vehicles, cars, cable transport, river transport, active and sustainable mobility, and rail. CARA implements collective actions: research and innovation projects, real-life demonstrators, actions for the economic and industrial development of its members. The activity is organised around five research programmes: energy (management and conversion of energy for mobility), safety and security, vehicle architecture, transport system and intelligence, mobilities (practices and governance).

Based in the west of France (Brittany, Pays de la Loire, New 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, embedded systems intelligence, vehicles (uses and industrialisation) and digital mobility services and infrastructure. As part of phase V, ID4CAR becomes ID4MOBILITY to realise its strategy of being a centre dedicated to land mobility in all its forms (vehicles, services, infrastructure or industry).

Clusters other than those specialising in the automotive industry may have opportunities in this sector, such as those working on materials, rubber, plastics, mechanics or mobility. Polymeris is the competitiveness cluster for rubber, plastics and composites, born of the merger of Elastopôle, dedicated to rubber and polymers, and Plastipolis, dedicated to plastics processing, both anchored in the Auvergne-Rhône-Alpes and Centre-Val-de-Loire regions. Its two main strategic focuses are the industry of the future and the circular economy. Based in the Hauts-de-France region, i-TRANS is the competitiveness cluster for transport, mobility and logistics. Its activities now focus on four priority sectors: rail, automotive, aeronautics and the industry of the future. TOTEM, which stands for Transport d'Occitanie Terrestre Et Maritime (Land and Maritime Transport in Occitania), is the smart and sustainable mobility cluster in Occitania. It works with the rail, maritime and automotive sectors and has 140 members.

FRENCH AUTOMOTIVE FOREIGN TRADE

In 2023, France's trade balance improved significantly (+€63 billion) to reach -€99.6 billion. This improvement is mainly due to a decrease in imports (-7.1%, after +29.4% in 2022) and, to a lesser extent, to an increase in exports (+1.5%). The fall in imports, after two years of strong growth, is mainly due to the fall in energy prices, which has led to a reduction in the energy bill. Exports were driven by transport equipment (aircraft and car manufacturing), which accounted for four-fifths of the increase, while exports of agricultural products, energy and energy-intensive sectors declined, in a context of falling prices.

Exports in the automotive industry, up 17.1% in 2023, reached a record level of €58.3 billion, exceeding their pre-crisis level. Exports increased in all vehicle categories, as well as in automotive equipment, engines, bodywork and trailers. Exports of new cars amounted to €20.6 billion (+16.8%), those of light commercial vehicles to €6.2 billion (+34.3%) and those of industrial vehicles to €7 billion (+32%). Exports of parts (including engines, chassis, bodywork and trailers) increased by 10% to €24.5 billion. Including second-hand vehicles, total exports from the automotive sector reached €61.4 billion in 2023, an increase of 17% compared to 2022. They now represent more than 10.2% of all French exports, valued at €600 billion, which puts the automotive industry in second place behind the agri-food industry (10.5%), but ahead of the aeronautics industry (9.6%), which has also regained market share.

Imports were just as dynamic as exports, but more so for new cars alone (+22.9%). This is explained by the acceleration of imports of electric cars (+78.6%), which represent almost a quarter of new car imports by value, before the launch of production of several models in France. Imports of light commercial vehicles and industrial vehicles increased by 17.3% and 21.5% respectively in 2023. Imports of parts, engines, bodywork and trailers increased at the same rate as exports, i.e. 10.2%.

Overall, the balance of the industrial automotive sector continued to worsen (-€4 billion), mainly due to the deterioration of the balance for new cars (-€4.7 billion) and that of parts (-€0.8 billion), while the balance for commercial vehicles improved slightly. The deficit of the industrial automotive sector amounted to -€27.2 billion in 2023, reflecting the lack of competitiveness of France as a location.

► FOREIGN AUTOMOTIVE TRADE
(IN BILLIONS OF EUROS)

	New cars	Including electric cars	New light commercial vehicles	New industrial vehicles (including B&C)	Parts, Engines and Bodywork (1)	Automotive industry branch (2)	Used vehicles	Automotive branch	All goods (3)	Automotive share
EXPORTS (FOB)										
2019	19.9	1.0	5.1	4.7	20.4	50.1	1.6	51.8	496.8	10.4%
2022	17.6	2.3	4.6	5.4	22.3	49.8	2.8	52.6	584.8	9.0%
2023	20.6	2.7	6.2	7.1	24.5	58.3	3.0	61.4	599.9	10.2%
Variation 2023/2022 in %	+16.8	+17.4	+34.3	+32.0	+10.2	+17.1	+8.7	+16.6	+2.6	-
IMPORTS (CIF)										
2019	32.9	1.0	4.5	5.2	22.7	65.3	1.6	66.9	575.7	11.6%
2022	33.5	5.3	4.4	4.9	30.1	73.0	2.1	75.1	775.1	9.7%
2023	41.2	9.4	5.2	6.0	33.2	85.6	1.7	87.3	721.5	12.1%
Variation 2023/2022 in %	+22.9	+78.6	+17.3	+21.5	+10.2	+17.2	-17.9	+16.3	-6.9	-
BALANCE										
2019	-13.0	+0.1	+0.6	-0.5	-2.3	-15.1	-0.0	-15.1	-78.9	-
2022	-15.9	-3.0	+0.2	+0.4	-7.9	-23.2	+0.7	-22.5	-190.3	-
2023	-20.6	-6.7	+1.0	+1.1	-8.7	-27.2	+1.3	-25.9	-121.6	-

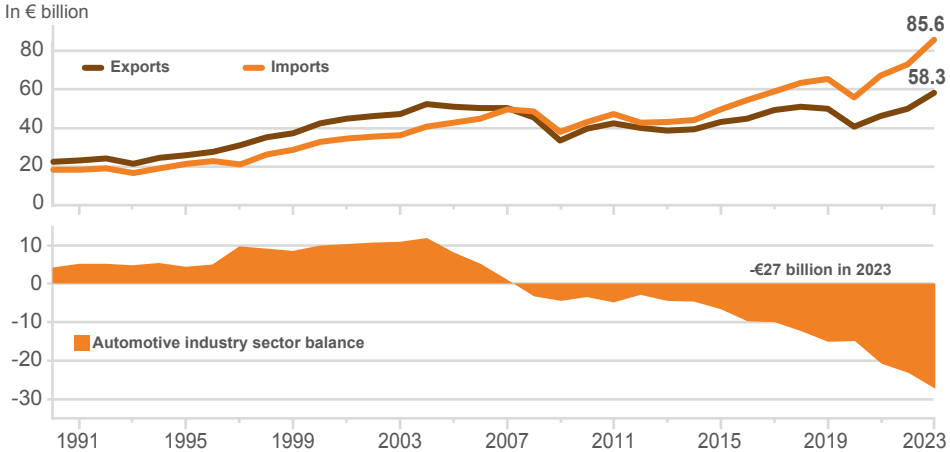
(1) From 2021, the scope is extended to new parts and trailers are taken into account.
(2) The automotive industry branch includes all new vehicles, parts, bodywork, chassis, engines, trailers. It does not take into account used vehicles.
(3) Not including military equipment.
FOB: Free on board; transaction 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 increased by transport and insurance costs to the border of the importing country.
Sources: Customs data processed by the CCFA

€58 billion
Exports of industrial automotive products from France in 2023

Exports from the automotive industry amounted to more than €50 billion in the mid-2000s, before falling sharply with the 2009 crisis. In 2018 and 2019, they returned to this level before falling again with the 2020 health crisis. At the same time, imports, despite a decline in 2009 and 2020, grew faster than exports. The automotive balance began to deteriorate in 2004, in line with the unfavourable trend in tax and social security contributions and the cost of labour in France compared to other European countries and became negative in 2007. It subsequently continued to grow, despite the rebound in vehicle exports from 2016 thanks to the dynamism of the European market and, for light commercial vehicles, the production of new vans in France (including for foreign partners). After the health crisis, exports grew but imports were even more dynamic, widening the sector's deficit, which increased further in 2023.

Regarding trade in parts and other automotive products (bodywork, chassis, trailers, engines), the balance remained in surplus until 2018. Then, in the context of the difficulties in the competitiveness of France as a location, imports grew much faster than exports, generating a negative balance that reached a record level of €8.7 billion in 2023. The energy transition leads to a need for equipment to produce electric vehicles (especially batteries, not yet produced in France) which accentuates this imbalance.

EVOLUTION OF TRADE IN THE AUTOMOTIVE INDUSTRIAL SECTOR



FRENCH AUTOMOTIVE FOREIGN TRADE

The main customers of the French automotive industry are generally European. In 2023, France's top five customers are Western European countries and represent 50% of exports from the automotive industry, down ten points from last year, which shows a greater diversity of destinations. In addition to the countries of Western Europe, the ten main customers for French automotive exports include countries in Eastern Europe and the wider Europe, such as Poland and Turkey.

For new private cars, the traditional outlets are the four main markets of the European Union (Germany, Spain, Italy, Belgium) and the United Kingdom. But in 2023, Turkey will be in fifth position ahead of Spain thanks to a threefold increase in the volume of new cars exported to that country, while the volume exported to Spain is falling. Germany, although still France's largest customer, has seen a sharp drop in its imports of passenger cars from France (-18%). Conversely, French exports of new passenger cars have increased in volume and value to Italy (+62% in value), the United Kingdom (+33%), Portugal (+120%) and the Netherlands (+30%).

In 2023, most light commercial vehicles continued to be exported to the same five countries. However, Germany was no longer in the lead, as it was overtaken by Belgium (€1.1 billion) and the United Kingdom (€974 million), with exports to these two countries increasing in volume by 37% and 21% respectively. Exports to Germany amounted to €898 million, down 7% in value and 26% in volume compared to 2022. Poland is now a more important partner than Italy and Spain for these flows and finds itself in fourth place with €292 million exported to this country, although volumes are down slightly in 2023.

Exports of industrial vehicles and coaches and buses continued to increase sharply in 2023 (+32%, after +29% in 2022) and exceeded €7 billion. This growth is explained by production, but also by assembly and preparation for marketing. Germany, France's largest customer in this market, increased its imports by 14% to €1.3 billion. Exports to Spain, the second largest customer in this market, increased by 55% to €886 million. Exports to Italy, in third place, amounted to €806 million, up 71% compared to 2022. The United Kingdom, in fourth place, also recorded a strong increase (+36%), reaching €609 million. Finally, Turkey overtook Poland with €349 million.

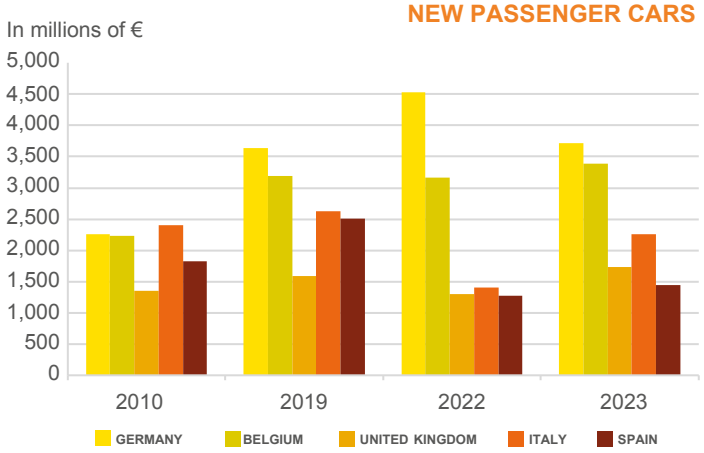
In the parts, engines, trailers and bodywork market, where the value of exports amounted to €24.5 billion in 2023, the top five destinations are European countries. Germany leads the way with 21% of French exports, or €5.1 billion, up 10% compared to 2022. It is followed by Spain, which accounts for 14% of the total, or €3.5 billion, up 19%, and the United Kingdom, which totals €2.3 billion (+19% compared to 2022). Italy and Belgium rank fourth and fifth respectively with 6% of French exports, around €1.4 billion. The other countries that receive parts and accessories from France are other countries in Western Europe (Sweden, the Netherlands, Portugal) or Central and Eastern Europe (Poland, Slovakia, Romania, Hungary), but also Turkey, Morocco and the United States.

Engine exports from France represent 9% of the total in this market, down two points compared to 2021. While Germany is the leading customer in the parts and accessories market, Spain is the leading customer in the engine market, particularly due to exports of electric motors. Indeed, France's total exports of electric motors amounted to €261 million in 2023, and half of this was destined for Spain. Finally, France exports the most chassis and bodywork to the United Kingdom, followed by Belgium.

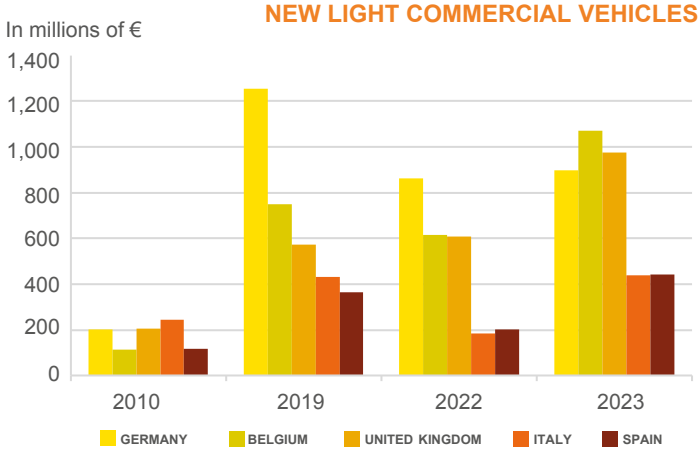
Germany — France's leading automotive trading partner

► MAIN DESTINATIONS OF AUTOMOTIVE EXPORTS FROM FRANCE

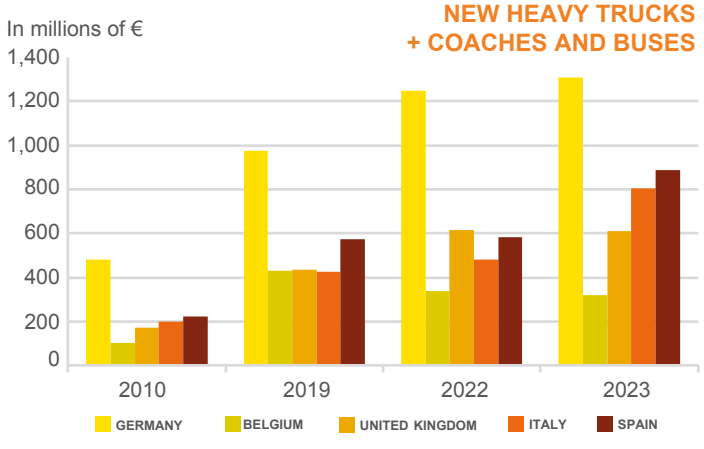
NEW PASSENGER CARS



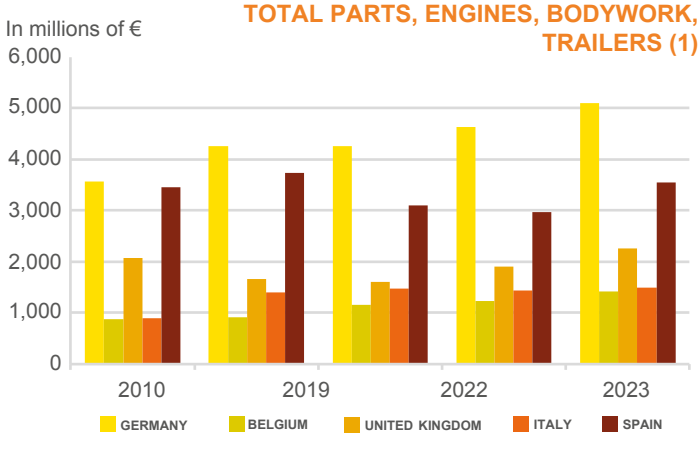
NEW LIGHT COMMERCIAL VEHICLES



NEW 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

FRENCH AUTOMOTIVE FOREIGN TRADE

On the import side, France's main partners are more geographically dispersed than for exports; but the top five supplier countries account for 50% of imports by the automotive industry, a concentration now identical to that observed for exports. The top five include Germany, Spain and Italy, followed by China and the Czech Republic. Turkey and Morocco are also among the top ten vehicle supplier countries, alongside Slovakia, Poland and the United Kingdom.

For passenger cars, Germany has moved into first place ahead of Spain and accounts for 20% of imports with €8.3 billion, a sharp increase compared to 2022. It benefits from its many premium brands in demand by French consumers. Spain is in second place with €6.7 billion, or 16% of the total value of new car imports, down slightly from 2022. China is in third position with 7% of total imports of passenger cars (€2.9 billion), compared with 3% in 2022, overtaking Slovakia (€2.8 billion) in fourth position.

For electric cars alone, China, which was in third place in French imports in 2022 behind Germany and Spain, is now in first place. In 2023, 34% of imported electric passenger cars came from China, representing €2.7 billion or 29% of the total. Germany is in second place with 18% of the volume and 25% of the value of imported electric cars.

For light commercial vehicles, Italy is the leading supplier country, accounting for 22% of flows. Germany is in second place and is up 27% compared to 2022. Turkey is now in third place, ahead of Spain and Portugal; it is growing strongly in 2023.

For industrial vehicles, Germany is in the lead and in 2023 represents 38% of total imports at €2.7 billion, up 28% compared to 2022. These flows are also explained by the pre-marketing activities located in France. Belgium, which was in second place, is now well behind the Netherlands and Turkey, which account for 15% and 11% of the total respectively.

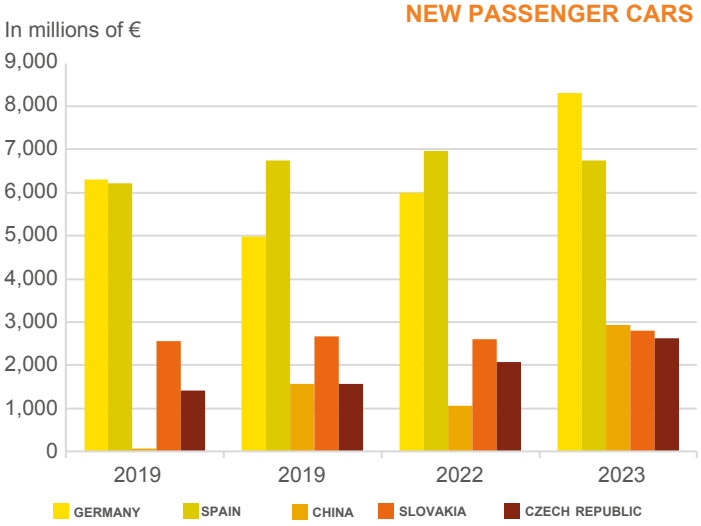
Regarding imports of parts and accessories, engines, bodywork and trailers, the 'parts and accessories' item represents €29 billion, or 88% of the total. Germany is in first place, far ahead of the other countries, with 18% of total imports. Spain and Poland are in second and third place, each accounting for 8.8% of France's parts imports in 2023. China is in fourth place with imports worth €2.8 billion, or 8.5% of the total, mainly consisting of parts and accessories, for which it is France's second largest supplier, but far behind Germany. Imports of electric motors from France remain very modest, amounting to only €96 million. Germany, with a third of imports, followed by Italy, is France's leading supplier. China comes in only third place.

China

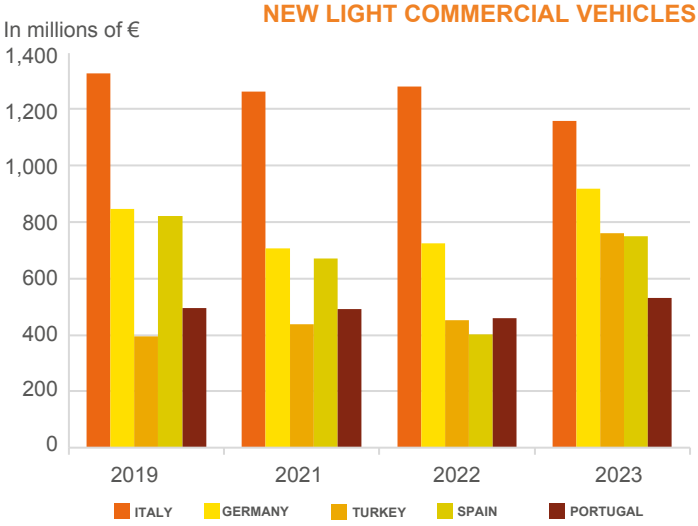
France's fourth-largest automotive industry supplier in 2023

► MAIN SOURCES OF AUTOMOTIVE IMPORTS IN FRANCE

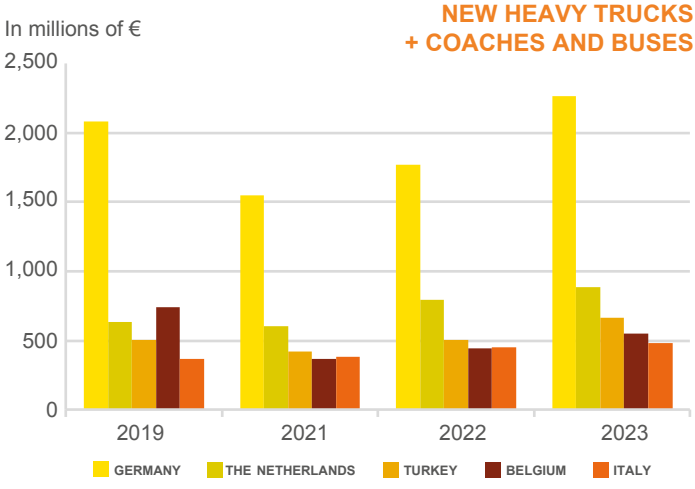
NEW PASSENGER CARS



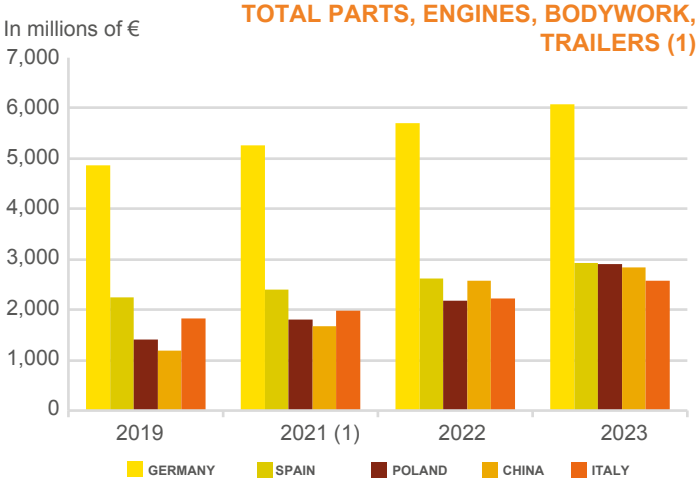
NEW LIGHT COMMERCIAL VEHICLES



NEW 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 2023, sales of new diesel-powered passenger cars continued to decline (-28.2%) and now account for only 10% of the total, a lower market share than that of electric cars. Moreover, after four years of decline, sales of petrol cars stopped falling in 2023 (+13%) and their market share remained at around 40%, compared with 41% in 2022.

Sales of electric cars, stimulated by the expansion of the offer and the maintenance of the bonus, even if it is reduced by 1000 euros, have continued to grow at a steady pace in 2023 (+47%). The end of the sale of combustion-engine cars by 2035, adopted by the European Parliament and the Council of the EU, as well as the desire, still expressed in 2023, to continue the development of low-emission zones in France, continue to stimulate the purchase of alternative energy cars (electric and hybrid). In 2023, electric car registrations reached 300,000 units, or 17% of total sales, representing a 7-point gain in market share in two years.

Hybrid cars, which will no longer receive any support in 2023, continue to gain market share, however, with a third of total sales, up 29.6% in 2023. Non-rechargeable hybrids dominate the hybrid market (70% of hybrids) and see their growth double in 2023, from +15% to +30%. Plug-in hybrid engines, which had fallen by more than 10% in 2022, are on the rise again (+29%) and now represent 9% of the total market.

In terms of the fleet, as of 31 December 2023, alternative energy engines represent 8% of the total, with 2.2% for electric cars. Diesel continues its steady decline (51% of the total), while the fleet of petrol cars has been growing since 2015, but at an increasingly slower rate.

17% **Share of new electric passenger cars registered in France in 2023**

► PASSENGER CARS BY ENERGY

	2000	2015	2019	2020	2021	2022	2023	Variation 2023/2022 as a %
REGISTRATIONS								
Petrol (1)								
In units		741,215	1,290,268	791,026	716,350	627,483	709,123	+13.0
As a % of total registrations	51.0%	39%	58%	48%	43%	41%	40%	-1.1 point
Diesel								
In units	1,046,485	1,097,124	755,583	504,178	349,479	239,104	171,728	-28.2
As a % of total registrations	49.0%	57%	34%	31%	21%	16%	10%	-6.0 points
Electric								
In units	-	17,268	42,764	110,917	162,106	202,929	298,219	+47.0
As a % of total registrations	-	0.9%	2%	7%	10%	13%	17%	3.5 points
Hybrids								
In units	-	61,619	125,372	243,464	430,838	459,215	595,249	+29.6
As a % of total registrations	-	3.2%	6%	15%	26%	30%	34%	3.5 points
of which non-rechargeable								
In units	-	56,030	106,780	168,872	289,837	332,669	432,299	+29.9
As a % of total registrations	-	2.9%	5%	10%	17%	22%	24%	2.6 points
of which rechargeable								
In units	-	5,589	18,592	74,592	141,001	126,546	162,950	+28.8
As a % of total registrations	-	0.3%	0.8%	5%	8%	8%	9%	0.9 point
Total registrations		1,917,226	2,214,279	1,650,118	1,659,004	1,529,033	1,774,723	+16.1
FLEET AS OF 31 DECEMBER								
Petrol								
In thousands of units	18,080	13,015	14,956	15,237	15,544	15,756	15,926	+1.1
As a % of the total fleet	64.4%	35%	39%	40%	40%	40%	41%	0.1 point
Diesel								
In thousands of units	9,980	23,718	22,610	22,024	21,416	20,665	19,885	-3.8
As a % of the total fleet	35.6%	64%	59%	57%	55%	53%	51%	-2.4 points
Electric								
In thousands of units	-	42	141	245	403	596	868	+45.7
As a % of the total fleet	-	0.1%	0.4%	0.6%	1.0%	1.5%	2.2%	0.7 point
Hybrids								
In thousands of units	-	212	565	805	1253	1715	2,286	+33.3
As a % of the total fleet	-	0.6%	1.5%	2.1%	3.2%	4.4%	5.8%	1.4 point
of which non-rechargeable								
In thousands of units	-	176	480	647	954	1,290	1,709	+32.5
As a % of the total fleet	-	0.5%	1.2%	1.7%	2.5%	3.3%	4.4%	1.0 point
of which rechargeable								
In thousands of units	-	36	85	158	300	425	577	+35.9
As a % of the total fleet	-	0.1%	0.2%	0.4%	0.8%	1.1%	1.5%	0.4 point
Total fleet	**28,060**	**37,164**	**38,421**	**38,468**	**38,815**	**38,971**	**39,259**	**+0.7**

(1) Including super ethanol and petrol/LPG.

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

In 2023, France remains in third place in the European market for the number of diesel cars sold, with 171,728 registrations, behind Germany (486,581 units) and Italy (273,295 units). Diesel engines accounted for only 14% of purchases by 'non-private individuals' in 2023, compared with 23% in 2022. Among private individuals, diesel is now marginal with 4.5% of sales. Petrol remains the top seller among non-private customers with a 37.5% market share (36.5% in 2022) but is also the most purchased engine type by private individuals (42.8%), even if it is losing ground to non-rechargeable hybrid and electric engines.

With regard to alternative engines, 595,249 new hybrid passenger cars were sold in 2023, placing France in fourth position in this market, behind Germany (840,304), the United Kingdom (742,382) and Italy (634,559). Non-rechargeable hybrid cars represent 26% of sales to private individuals and 23% of sales to non-private individuals. Finally, new electric passenger cars have increased in volume and market share in all customer segments. However, the market share of electric cars remains much higher in the private individual segment (23%) than in the non-private individual segment (12%). With 298,219 units sold, the French market is still in third place in Europe, behind Germany (511,295) and the United Kingdom (314,662).

In terms of the fleet in France, 51% of cars in circulation as of 31 December 2023 were equipped with a diesel engine. This ratio has decreased by more than 13 points since the peak in 2015 and by 2.4 points in one year. The share of petrol cars in the fleet has been growing since 2015 and now represents 41% of the total, a share that has stabilised since 2020. Alternative energy cars, meanwhile, represent 8% of the total fleet. The share of electric cars stands at 2.2% (+0.7 points), that of non-rechargeable hybrid cars at 4.4% (+1 point) and that of plug-in hybrid cars at 1.5% (+0.4 points).

ALTERNATIVE-ENERGY PASSENGER CARS

In 2023, registrations of alternative-energy (electric and hybrid) passenger cars continued to increase, by 47% for electric and 30% for hybrid. The market share of these vehicles has now reached 50%, compared with 36% in 2021. Electrified vehicles alone (electric + plug-in hybrids) represent 26% of the market.

The target of ending the sale of combustion engine vehicles in 2035 was confirmed in 2023 by an agreement between the Council of the EU and the European Parliament. The intermediate targets for reducing CO_2 emissions from new vehicles require a strong development of the electric vehicle market before that date.

In France, the State has continued to support the development of electromobility through the payment of the car bonus and the conversion premium, the amounts of which have, however, been reduced. The maximum bonus amount has been lowered from €6,000 to €5,000, with a ceiling for benefiting from it raised since mid-2022 to €47,000. In addition, the €1,000 bonus for plug-in hybrids has been abolished.

In terms of infrastructure, the European Parliament and the Council of the EU definitively adopted the AFIR (Alternative Fuel Infrastructure Regulation) in July 2023, which governs the deployment of charging stations for electric vehicles and sets targets for the coverage of the territory. It also includes new obligations regarding the transparency of charging prices and payment methods.

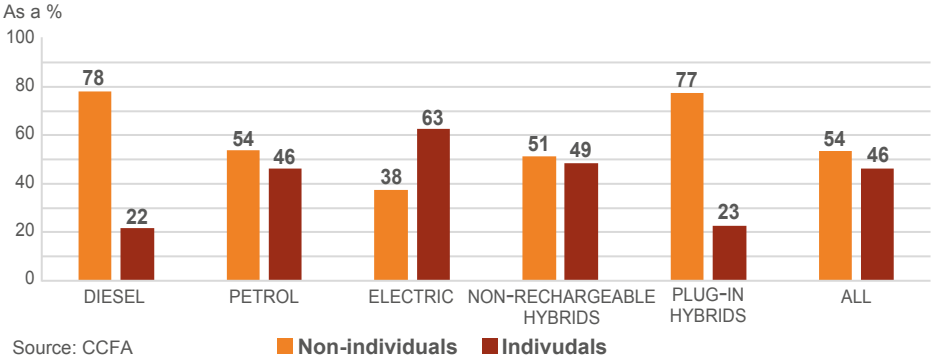
In France, the roll-out of charging infrastructure is continuing and the target of 100,000 charging stations open to the public was reached in 2023. The Advenir programme for apartment buildings, companies and local authorities had funded 143,500 charging points by the end of 2023.

63% **Share of electric car registrations by private individuals in 2023**

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

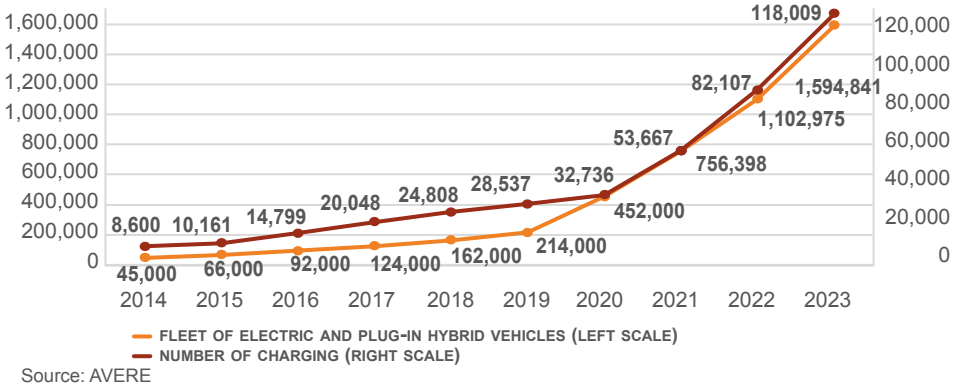
RANK	BRAND	MODEL	VOLUME	%
1	TESLA	MODEL Y	37,127	12.4%
2	DACIA	SPRING	29,761	10.0%
3	TESLA	MODEL 3	24,539	8.2%
4	FIAT	500	23,189	7.8%
5	PEUGEOT	208 II	22,698	7.6%
6	M.G.	MG4	20,072	6.7%
7	RENAULT	MEGANE E-TECH	17,623	5.9%
8	RENAULT	TWINGO III	8,503	2.9%
9	MINI	MINI III	7,634	2.6%
10	RENAULT	ZOE	5,990	2.0%

PASSENGER CAR REGISTRATIONS IN 2023 BY ENERGY AND CUSTOMER CATEGORY



Source: CCFA

EVOLUTION OF THE FLEET OF ELECTRIC AND RECHARGEABLE HYBRID VEHICLES AND THE NUMBER OF CHARGING POINTS IN FRANCE



Source: AVERE

As of 31 December 2023, France had 118,009 charging points open to the public for 1,594,841 electric or plug-in hybrid vehicles, or 1 for every 14 vehicles according to AVERE figures. The number of charging points, which are spread over 40,000 stations throughout the country, increased by 44% in 2023, but this is still insufficient to meet demand. A study by AVERE carried out in 2023 estimated the need for public charging until 2035 at between 300,000 and 400,000 charging points for more than 12 million vehicles.

Even if 90% of electric vehicle users recharge at home or at their place of work, the presence of recharging points in the territory remains insufficient. According to the Car Fleet survey, 29% of working people surveyed will have a recharging point at their place of work by the end of 2023 (compared with 12% by the end of 2021). A quarter of those surveyed also have a charging point at or near their home. 33% of people find charging points on their usual routes, a figure up 5 points compared to 2022. On the other hand, a quarter of people cannot find any charging stations on their usual routes and 42% do not know. On motorways, the development of recharging points also accelerated in 2023 and now 100% of service areas on motorways operated by concessionaires are equipped with fast charging.

In terms of the vehicle offering, it expanded further in 2023 to include electric and hybrid models. More than 80 different models of electric cars were sold in France in 2023, and the Renault and Stellantis groups still dominate the market with nearly 30 models available in 100% electric versions. Among the ten best-selling models in France in 2023, six are offered by Renault and Stellantis. Dacia's Spring accounts for 10% of the volume of 100% electric vehicles sold. The Fiat 500 and Peugeot 208 are in fourth and fifth place, each with a market share of around 7.5%. Finally, Renault's Mégane, Twingo and Zoé are also in the top ten. In the plug-in hybrid segment, the top four best-selling models belong to Stellantis (308, 3008, C5 Aircross and DS7). As for non-plug-in hybrids, four Renault models feature in the top 10.

On the demand side, the electric car market is mainly fuelled by demand from private individuals, who account for 63% of buyers. Demand from non-private customers is not yet as developed: 37.5% of total electric sales in 2023, compared with 53% of the market for all energy sources combined. The usage profiles (frequent diesel users, vehicle rental companies) and the low maturity of the second-hand electric market are factors that are slowing down the greening of fleets. Despite the fleet electrification targets set out in the Mobility Framework Act and the various financial incentives (TVS, depreciation ceiling, exemption from the Special Tax on Insurance Agreements, etc.), the proportion of electric vehicles in registrations by non-private individuals (companies, government, rental companies) is only 12% in 2023 (compared with 23% for private individuals).

NEW CAR REGISTRATIONS BY MODEL, RANGE AND BODY TYPE

The economy and lower range is predominant in France, with a 51.2% market share in 2023. Within this range, it is the lower range cars that dominate the market (45.5% of the total), with eight models in this range among the ten best-selling models. The development of the all-terrain, all-road product offering in this range (2008, Captur, Duster) is stimulating the segment, which is also benefiting from the success of certain models (Clio, 208, Sandero, C3). The development of hybrid or electric models or versions (208, 2008, 3008, DS3 Crossback, Clio, Corsa) has also helped to broaden the offering.

The economy range, which had reached 11.5% of sales in 2009 thanks to the success of the conversion premium and the bonus, accounts for 5.8% of sales in 2023. However, it is much more present in the electric market, with four models (Spring, Fiat 500, Twingo, ZOE) among the ten best-selling electric models. The lower-middle range accounted for 24.1% of the market in 2023 and three models are in the top 15 on the market (308, 3008 and Arkana). It also benefits from the development of electric or hybrid models (Megane-E, Arkana). In addition, the success of Tesla's two flagship models (Model 3 and Model Y) continues to boost the Luxury segment in 2023, which jumps to 5.8% of registrations, as much as the economy segment.

Since the Covid crisis, the market has been at a lower level than before, and this trend is affecting the lower ranges more, which have lost 6 points of market share compared to 2019.

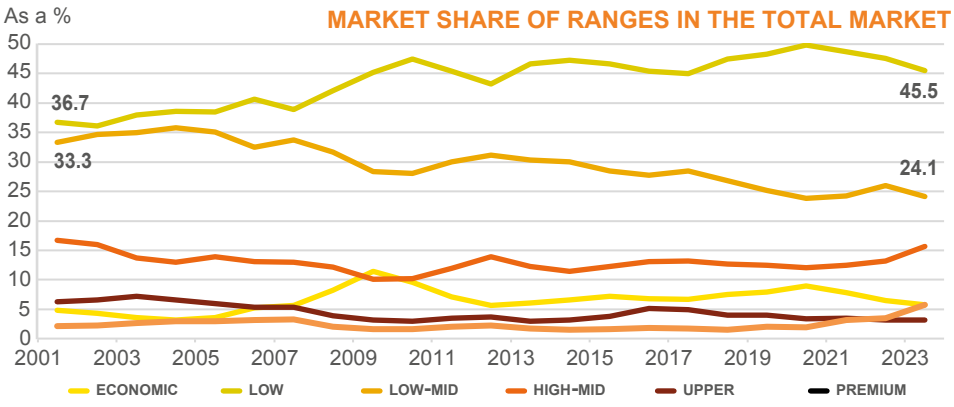
Sales by body type show that for the first time, saloons have been overtaken by SUVs, with a 45.4% market share for the former and 46.6% for the latter. Thus, in 2023, the 4WD, SUV body is the most sold in France, a success that can be explained both by consumer preferences and by the development of the offer in the lower ranges (Captur, 2008, Duster) and lower-middle ranges (3008, Arkana, C3 Aircross, C5 Aircross, 5008). Finally, the other market segments (minivans, station wagons and coupé convertibles) have continued to decline over the last decade or so.

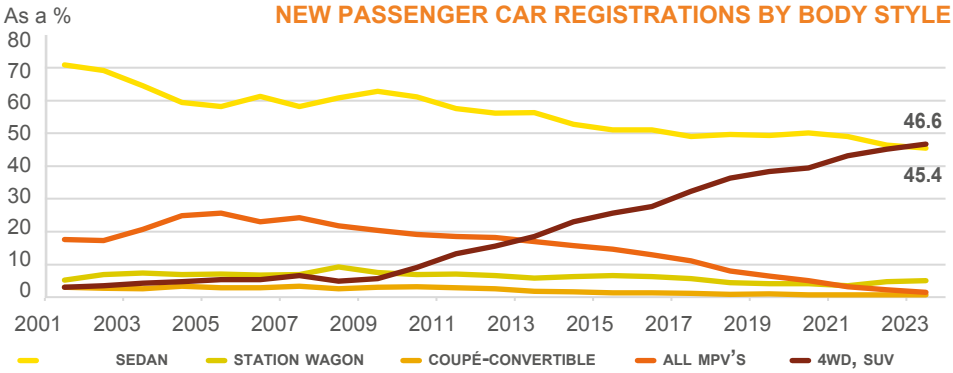
47% Share of new passenger cars registered belonging to the 4WD and SUV bodies

► RANKING OF THE MAIN NEW PASSENGER CAR MODELS IN 2023

Rank	Brand	Model	% market
1	RENAULT	CLIO V	5.5%
2	PEUGEOT	208 II	4.9%
3	DACIA	SANDERO 3	3.9%
4	CITROEN	C3 III	3.4%
5	PEUGEOT	2008 II	2.8%
6	RENAULT	CAPTUR II	2.7%
7	PEUGEOT	308 III	2.6%
8	TESLA	MODEL Y	2.1%
9	DACIA	DUSTER 2	1.8%
10	FIAT	500	1.8%
11	TOYOTA	YARIS CRO	1.8%
12	PEUGEOT	3008 II	1.7%
13	RENAULT	AUSTRAL	1.7%
14	DACIA	SPRING	1.7%
15	RENAULT	ARKANA	1.7%
16	TOYOTA	YARIS	1.6%
17	VOLKSWAGEN	POLO VI	1.5%
18	DACIA	JOGGER	1.4%
19	TESLA	MODEL 3	1.4%
20	FORD	PUMA	1.3%
21	VOLKSWAGEN	T-ROC	1.2%
22	CITROEN	C3 AIRCR.	1.2%
23	M.G.	MG4	1.1%
24	CITROEN	C5 AIRCR.	1.1%
25	OPEL	CORSA	1.1%
26	HYUNDAI	TUCSONIII	1.0%
27	MINI	MINI III	1.0%
28	RENAULT	MEGANE-E	1.0%
29	RENAULT	TWINGOIII	1.0%
30	NISSAN	QASHQAI 3	0.9%

Source: CCFA





► NEW CAR REGISTRATIONS BY RANGE

Ranges	2000		2010		2019		2022		2023	
	units	%	units	%	units	%	units	%	units	%
Economic and low	855,161	40.1	1,283,902	57.0	1,246,492	56.3	827,650	54.1	909,373	51.2
Low-mid	695,146	32.6	627,694	27.9	557,062	25.2	396,776	25.9	428,080	24.1
Upper mid	303,028	14.2	234,664	10.4	276,406	12.5	202,319	13.2	277,977	15.7
Premium	163,293	7.7	105,313	4.7	134,319	6.1	102,290	6.7	159,293	9.0
Others	117,256	5.5	96	0.0	0	0.0	0	0.0	0	0.0
TOTAL	2,133,884	100.0	2,251,669	100.0	2,214,279	100.0	1,529,035	100.0	1,774,723	100.0

► NEW CAR REGISTRATIONS BY BODY TYPE

Body types	2000		2010		2019		2022		2023	
	units	%	units	%	units	%	units	%	units	%
Sedan	1,527,676	71.6	1,377,498	61.2	1,094,467	49.4	709,558	46.4	805,606	45.4
Station wagon	119,739	5.6	153,476	6.8	92,487	4.2	72,167	4.7	90,138	5.1
Coupé-convertible	50,527	2.4	70,353	3.1	21,562	1.0	11,998	0.8	12,816	0.7
All MPV'S	369,434	17.3	430,857	19.1	142,540	6.4	35,201	2.3	27,343	1.5
4WD, SUV	57,116	2.7	205,106	9.1	847,850	38.3	690,892	45.2	827,579	46.6
Others	9,392	0.4	14,379	0.6	15,373	0.7	9,219	0.6	11,241	0.6
TOTAL	2,133,884	100.0	2,251,669	100.0	2,214,279	100.0	1,529,035	100.0	1,774,723	100.0

Source: CCFA

USED PASSENGER CARS

In 2023, the used car market remained stable at 5.2 million units, in a context of an upturn in new car registrations (+16%). The number of used cars sold for every new car had risen to more than 3 between 2020 and 2022 due to the shortage of vehicles and the increase in prices on the new car market. In 2023, this ratio fell back to 2.9, thanks to the recovery of the new car market, but also because of the second-hand market, which offers fewer recent vehicles and on which prices have also risen sharply. The price of second-hand cars increased by an annual average of 3.9% in 2023, compared with 4% for new cars.

The average age of second-hand cars that changed hands in 2023 continues to increase. Transactions involving cars less than a year old fell by 12.0% and now only represent 5% of transactions, compared with 10% in 2019. Conversely, the share of second-hand cars fifteen years old or more has increased to 28%, compared with 19% in 2019. Cars ten years old or more now account for 48% of the total, compared with 41% in 2019.

Diesel cars, which now only represent 10% of new registrations, continue to dominate the second-hand market, but their share fell by 1 point in 2023 to 51% of the market (2.6 million units). Their decline is in favour of alternative engines, which benefit from purchase support schemes (bonuses, conversion grants), while petrol cars are declining in volume (-1.4%) and losing market share (-1 point to 40% of the total). The second-hand electric car market is still underdeveloped. Nevertheless, it grew by 21.4% in 2023 to reach 89,000 units, or 1.7% of the total market, compared with 17% of the new car market; reaching a critical size for the second-hand electric vehicle market will take time. Registrations of hybrid second-hand cars have increased by 29% and now represent 7.9% of transactions.

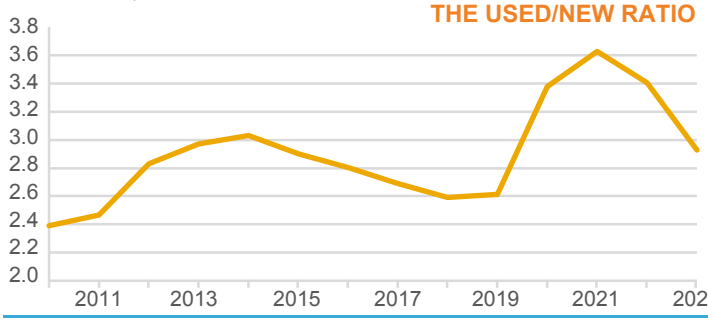
28% Share of cars used aged 15 and over registered in 2023

► USED CARS

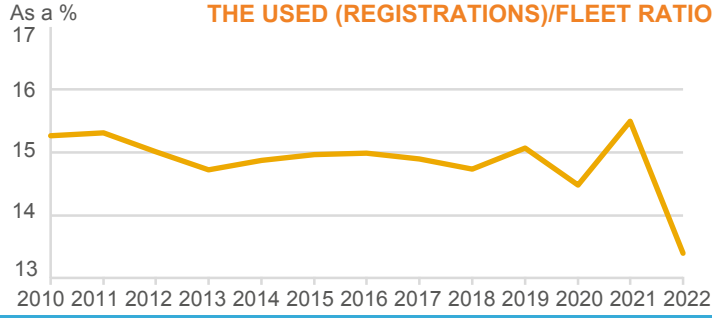
	Units	2000	2010	2019	2020	2021	2022	2023
REGISTRATIONS								
New cars	thousands	2,134	2,252	2,214	1,650	1,659	1,529	1,774
Used cars	thousands	5,082	5,386	5,791	5,569	6,016	5,205	5,196
used / new ratio		2.4	2.4	2.6	3.4	3.6	3.4	2.9
Cars less than five years old	% used	40	37	37	37	36	32	31
Cars less than a year old	% used	12	8	10	9	8	6	5
Cars less than a year old	% new	29	19	27	31	27	20	15
Cars over five years old	% used	60	63	63	63	64	68	69
Cars from five to 9 years old	% used	-	26	21	20	20	20	21
Cars from 10 to 14 years old	% used	-	21	22	22	22	22	20
Cars 15 years old and over	% used	-	15	19	21	22	25	28
Used diesel powered cars	thousands	-	3,558	3,518	3,200	3,339	2,711	2,645
	% used	-	66.1	61	57	56	52	51
Used electric or hybrid cars	thousands		6	104	146	285	331	409
	% used		0.1	1.8	2.6	4.7	6.4	7.9
CAR FLEET (AS OF 12/31)	**thousands**	**28,825**	**35,280**	**38,421**	**38,468**	**38,815**	**38,856**	**-**
USED (REGISTRATIONS) / FLEET RATIO	**%**	**17.6%**	**15.3%**	**15.1%**	**14.5%**	**15.5%**	**13.4%**	**-**

Sources: CCFA, MTE/SDES

THE USED/NEW RATIO



THE USED (REGISTRATIONS)/FLEET RATIO



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

Second-hand cars are sold through a car dealer or directly between individuals. Dealers generally handle transactions for 'young' second-hand cars, i.e. less than 5 years old. According to the Car Fleet survey, sales channels between private individuals have declined with the pandemic, in favour of dealer second-hand networks, which are undoubtedly more reassuring in terms of health. In 2023, the share of second-hand transactions carried out through a professional now stands at 70%, including 47% through a car brand dealer. Purchases from private individuals have fallen by a further two points in one year.

Between 5 and 6 million used cars are traded each year, and this market is subject to fewer fluctuations than the new car market. Demand for used vehicles is generally more closely aligned with the evolution of the car fleet; it is less influenced by economic factors than demand for new cars and is therefore less impacted in the event of major crises. It can nevertheless be affected by measures to stimulate the new car market. On average, 15% of the fleet changed hands each year, but this ratio fell to 13% in 2022 and is expected to remain at this level in 2023.

Since 1990, the ageing of the fleet and the development of multi-motorisation in households have resulted in an increase in the proportion of cars more than 5 years old in second-hand transactions. Then, over the next three years, incentives to renew the fleet (conversion premium) increased the proportion of second-hand cars less than 5 years old. Since the health crisis and the semiconductor crisis, the weakness of the new car market has mechanically increased the share of older second-hand cars, particularly those over 15 years old, which rose from 19% in 2019 to 28% in 2023.

Second-hand cars less than a year old can be compared to the new car market. This is because they are often cars first registered by a car dealer (demonstration or rental car), then sold to private individuals. Their share declined steadily from 2001 to 2009, during the years of the scrappage scheme, when new car prices were more competitive. Then, volumes increased every year until 2020. Since then, the reduction in sales to car professionals, supply difficulties, the shortage of semiconductors and rising prices have caused a further decline in the number of new vehicles destined to become recent second-hand vehicles.

In 2023, according to the Car Fleet Survey, cars purchased second-hand still account for a high proportion of the fleet (59%, compared with 51% in 1991). In car purchases made in 2023, their share amounts to 62%, compared with 67% in 2021. New cars will thus represent 38% of cars purchased in 2023, compared with 33% in 2021.

REGISTRATIONS OF NEW VEHICLES IN FRENCH OVERSEAS DEPARTMENTS (DOM)

Sales of new vehicles in the five overseas departments increased by 0.8% in 2023, compared with -1.9% in 2022. This growth, although weak, can be explained by the recovery in registrations of light commercial vehicles and industrial vehicles, which increased by 2.3% and 5.2% respectively. Registration of passenger cars increased by 0.4%, following a rise of 0.1% in 2022.

The trends vary from one department to another. Reunion Island, which represents the largest market with 41% of vehicle registrations in the overseas departments, has seen a decline for the second consecutive year, due to the fall in private car registrations (-2.7%). Guadeloupe and Martinique, which are the 2nd and 3rd markets in the area, each accounting for 23% of registrations, are up by 0.6% and 2.7% respectively (including 1.9% and 4.3% for private cars). Despite the return of growth in registrations in some departments, total registrations in the area are still down by around 8% compared to 2019 and 10% for private cars alone.

As in mainland France, registrations of diesel cars continue to fall in 2023 and now represent only 10.2% of the total, compared with 9.7% in mainland France. Electric cars, on the other hand, have increased by an average of 26%, but with very different trends depending on the department. They now represent 7.1% of registrations on average and up to 11.2% in Reunion Island but only 1.7% in French Guyana. For plug-in hybrid vehicles, the market share does not exceed 2.7% compared to 9.2% in mainland France.

Registrations of industrial vehicles weighing more than 5 tonnes, which had fallen sharply in 2022, increased by 20% across the entire area and are up in all departments. Conversely, registrations of buses and coaches are falling sharply (-24%) in all departments, except in Guadeloupe where they are stagnating. Electric industrial vehicles are almost non-existent.

The Renault Group and Stellantis retain high market shares in the overseas departments. For passenger cars, the market share amounts to 53% on average in 2023, down 2 points compared to 2022. For light commercial vehicles, the penetration rate stands at 65%, a stable level compared to 2022. In the narrow industrial vehicle market, Renault Trucks' penetration stands at 36.4% in 2023, up one point compared to 2022.

Registrations of second-hand passenger cars, which had fallen by 4.8% in 2022, declined again in 2023 (-2.5%), to stand at 124,458 units, a ratio of 2.1 second-hand cars for every new car, compared with 2.9 in mainland France.

9% **Share of electric cars registered in the French overseas departments in 2023**

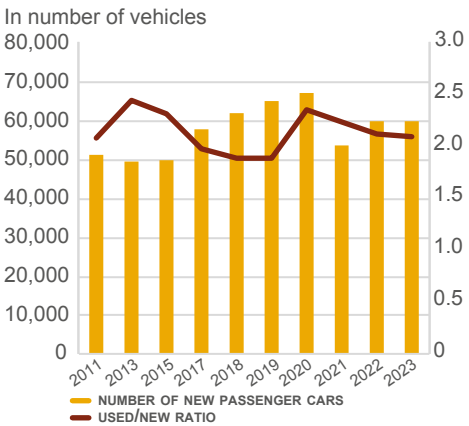
NEW PASSENGER CARS	2000	2010	2015	2019	2020	2021	2022	2023	Variation 2023/2022	Variation 2023/2019
GUADELOUPE	13,691	13,438	13,409	16,741	12,230	12,731	14,162	14,432	1.9%	-13.8%
GUYANA	4,031	4,382	4,414	5,450	4,410	5,497	5,418	5,462	0.8%	0.2%
MARTINIQUE	14,424	13,147	12,931	15,853	11,374	12,965	13,364	13,932	4.3%	-12.1%
MAYOTTE (1)	-	-	1,083	1,729	1,657	2,095	1,958	2,007	2.5%	16.1%
REUNION ISLAND	21,463	20,295	22,288	27,556	23,990	26,667	25,110	24,443	-2.7%	-11.3%
TOTAL DOM	**53,609**	**51,262**	**54,125**	**67,329**	**53,661**	**59,955**	**60,012**	**60,276**	**0.4%**	**-10.5%**
TOTAL DOM USED PASSENGER CARS	**ND**	**104,381**	**125,457**	**127,746**	**126,436**	**134,184**	**127,702**	**124,458**	**-2.5%**	**-2.6%**
USED/NEW RATIO	**-**	**2.0**	**2.3**	**1.9**	**2.4**	**2.2**	**2.1**	**2.1**	**-**	**-**

LIGHT COMMERCIAL VEHICLES (UP TO 5 T)	2000	2010	2015	2019	2020	2021	2022	2023	Variation 2023/2022	Variation 2023/2019
GUADELOUPE	2,685	2,394	2,214	2,465	2,136	2,763	2,838	2,667	-6.0%	8.2%
GUYANA	1,143	1,239	1,159	1,311	1,208	1,578	1,519	1,515	-0.3%	15.6%
MARTINIQUE	2,368	2,016	2,156	2,059	1,849	2,744	2,584	2,453	-5.1%	19.1%
MAYOTTE (1)	-	-	230	401	331	472	431	566	31.3%	41.1%
REUNION ISLAND	5,200	4,166	4,975	5,863	4,875	6,101	4,965	5,422	9.2%	-7.5%
TOTAL DOM	**11,396**	**9,815**	**10,734**	**12,099**	**10,399**	**13,658**	**12,337**	**12,623**	**2.3%**	**4.3%**

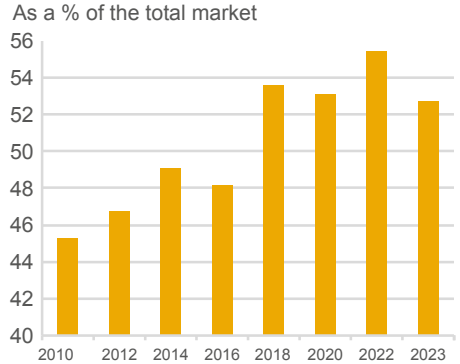
INDUSTRIAL VEHICLES INCLUDING COACHES AND BUSES (OVER 5 T)	2000	2010	2015	2019	2020	2021	2022	2023	Variation 2023/2022	Variation 2023/2019
GUADELOUPE	146	135	97	183	153	186	120	126	5.0%	-31.1%
GUYANA	66	85	50	88	106	113	111	136	22.5%	54.5%
MARTINIQUE	187	84	128	170	149	182	167	162	-3.0%	-4.7%
MAYOTTE (1)	-	-	48	81	84	134	121	120	-0.8%	48.1%
REUNION ISLAND	362	293	434	376	390	401	352	372	5.7%	-1.1%
TOTAL DOM	**761**	**597**	**757**	**898**	**882**	**1,016**	**871**	**916**	**5.2%**	**2.0%**

Source: CCFA
(1) From 1 April 2011

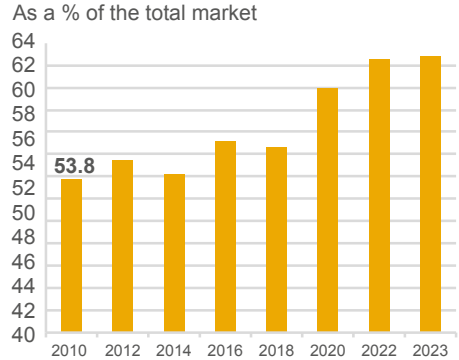
PASSENGER CARS: REGISTRATIONS AND USED/NEW RATIO



PENETRATION OF THE RENAULT GROUP AND STELLANTIS (1) IN OVERSEAS DEPARTMENTS (PASSENGER CARS)



PENETRATION OF THE RENAULT GROUP AND STELLANTIS (1) IN OVERSEAS DEPARTMENTS (LIGHT COMMERCIAL VEHICLES)



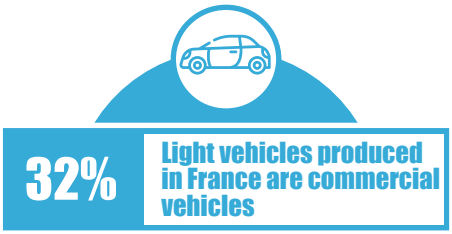
(1) excluding FCA before 2021.
Source: CCFA

LIGHT COMMERCIAL VEHICLES IN FRANCE

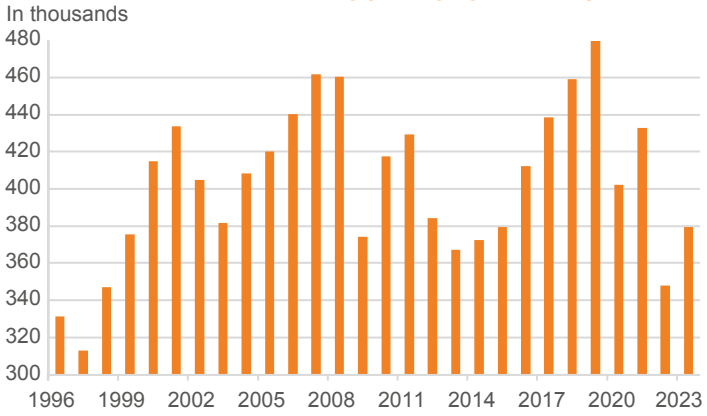
In 2023, the market for new light commercial vehicles rebounded by 9%, after falling by 19.5% in 2022. With 379,250 units registered, its level remains well below its long-term average of around 400,000 units and is down 20% compared to 2019. The used light commercial vehicle market, which had fallen by 9.1% in 2022, grew by 2.8% in 2023 and returned to a level slightly higher than 2019, with 839,957 units. The ratio of used registrations to new registrations stands at 2.2 in 2023, which is slightly higher than the level observed during the 2009 crisis (2.1).

French groups and brands have always occupied a dominant position in the French light commercial vehicle market. In 2023, sales by the Renault group, Stellantis and other French brands account for 69.4% of light commercial vehicle sales.

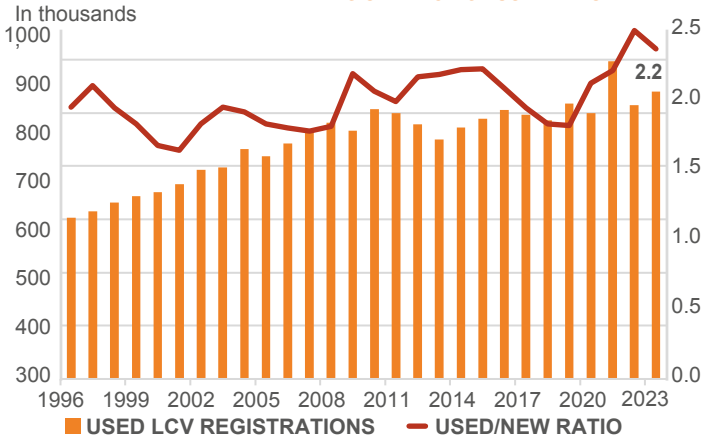
These groups are also leading manufacturers and produce at their sites for their partners (Renault for Renault Trucks, Nissan and Mercedes; Stellantis for Toyota). In France, the production of light commercial vehicles reached 476,878 units in 2023 and represents 32% of the country's automotive production. Entirely produced by the Renault and Stellantis groups, it represents 2% of the world's light commercial vehicle production.



REGISTRATION OF NEW LCVS IN FRANCE

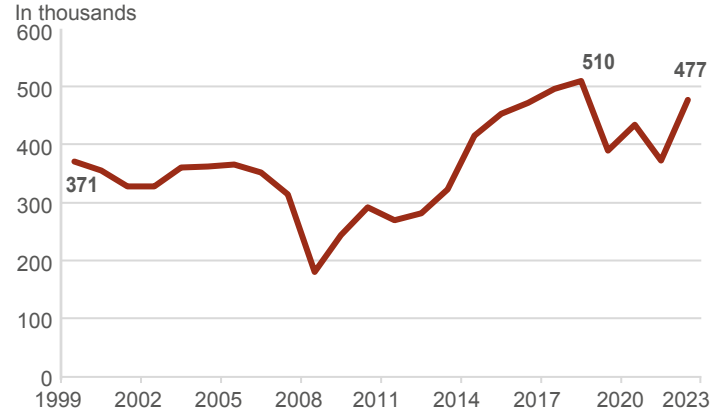


REGISTRATION OF USED LCVS IN FRANCE



PENETRATION RATE 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 maximum authorised weight of less than 5 tonnes, mainly intended for the transport of goods. In many sectors (agriculture, construction, services, etc.), they are also used to travel to and from the workplace, for transfers between sites and for the transport of equipment. They are divided into different categories: utility derivatives of private cars, combispaces, vans, pick-ups and off-road vehicles.

These vehicles are intensively used: every year they travel more kilometres (2,000 more on average) than private cars (see the traffic report on page 51). While private individuals travel fewer kilometres in their light commercial vehicles, some sectors are very intensive users: transport, courier services, warehousing, as well as specialised activities and manufacturing industry. These vehicles are mainly used in urban areas or on roads (excluding motorways).

The fleet of new light commercial vehicles, estimated at 6.5 million units as of 31 December 2023, is 50% owned by individuals (private individuals and artisans), 14% by legal entities operating in the construction sector and 8% in the commercial sector. Its average age varies between 10 and 11 years and is slightly lower than that of private cars (10.9 instead of 11.2 as of 31 December 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 initially 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. However, the health crisis, followed by the semiconductor crisis, caused production to fall back below the 400,000-unit mark. But in 2023, production recovered with the market upturn and increased by 28.4%, reaching over 478,000 units.

CHARACTERISTICS OF LIGHT COMMERCIAL VEHICLES IN FRANCE

The light commercial vehicle market has changed since the early 2000s with the evolution of demand for greater load capacity and a desire for massification to reduce the environmental footprint. Thus, vehicles weighing less than 2.5 tonnes, which represented two-thirds of the market in 2001, now only represent one-third. Light commercial vehicles over 2.5 tonnes have become the majority since 2016 and accounted for 59% of the market in 2023.

This shift from small-tonnage vehicles to heavier vehicles is also accompanied by the development of demand for vans. The van segment, which accounted for only 24% of sales in 2000, is now the largest segment with 43.8% of sales in 2023. The minivan segment is the second largest with 24% of sales, ahead of passenger car derivatives. The latter constituted the largest segment in 2000, accounting for a third of sales. Today, they represent only 14.1% of the market. Finally, sales of pick-ups, which had grown strongly between 2015 and 2018, are declining from 2019 onwards. They represent only 3% of sales in 2023.

In terms of engines, alternatives to combustion engines are developing more slowly than in the passenger car market. Diesel still dominates the market with 77.1% of sales, but it lost 8 points of market share in 2023 (and 19 points since 2017). Petrol engines, which are in second place, experienced strong growth in 2023 (+79%) and now represent 11.2% of sales. The electric segment is growing at the same rate as petrol (+80%), gaining 3 points of market share to 8% in 2023. The hybrid segment is up 31%, but remains underdeveloped with a 2.6% market share, mainly in passenger car derivatives.

In the market for light commercial vehicles of less than 5 tonnes, Stellantis and the Renault group account for 69.4% of registrations in 2023. The ten best-selling models in France in 2023 belong to the Renault or Stellantis group. Of the top ten models, five are vans, three are minivans and the remaining two are passenger car derivatives.

8% Market share of electric commercial vehicles in 2023

► REGISTRATIONS OF NEW LIGHT COMMERCIAL VEHICLES BY BODY STYLE

CARROSSERIES	2000		2010		2015		2022		2023	
	units	%	units	%	units	%	units	%	units	%
Cars derivatives	133,679	32.2	116,582	27.9	85,976	22.7	47,899	13.8	53,382	14.1
Small vans	110,727	26.7	113,152	27.1	99,227	26.2	69,937	20.1	90,972	24.0
Vans	99,953	24.1	136,647	32.7	140,153	36.9	162,367	46.6	165,981	43.8
Mini-buses/coaches	867	0.2	525	0.1	621	0.2	453	0.1	429	0.1
Pickup	6,327	1.5	12,126	2.9	12,877	3.4	9,486	2.7	11,462	3.0
4WD, SUV	4,470	1.1	9,302	2.2	9,908	2.6	8,872	2.5	10,722	2.8
Others	58,943	14.2	29,278	7.0	30,666	8.1	49,062	14.1	46,263	12.2
TOTAL	**414,966**	**100.0**	**417,612**	**100.0**	**379,428**	**100.0**	**348,076**	**100.0**	**379,211**	**100.0**

► RANKING OF THE MAIN MODELS OF NEW LIGHT COMMERCIAL VEHICLES IN 2023

Rank	Brand	Model	Market share
1	RENAULT	MASTER	7.9%
2	RENAULT	TRAFIC	6.8%
3	PEUGEOT	PARTNER	5.8%
4	CITROEN	BERLINGO	4.8%
5	RENAULT	KANGOO	4.8%
6	PEUGEOT	EXPERT	4.0%
7	IVECO	DAILY	3.8%
8	RENAULT	CLIO	3.8%
9	FIAT	DUCATO	3.5%
10	PEUGEOT	208	3.3%
11	CITROEN	JUMPY	3.3%
12	FORD	T.CUSTOM	3.1%
13	RENAULT	EXPRESS	2.9%
14	CITROEN	JUMPER	2.8%
15	FORD	TRANSIT	2.8%
16	CITROEN	C3	2.4%
17	PEUGEOT	BOXER	2.3%
18	MERCEDES	SPRINTER	2.3%
19	VOLKSWAGEN	TRANSPORT	2.2%
20	RENAULT	MASTER RT	1.9%

► REGISTRATION OF NEW LIGHT COMMERCIAL VEHICLES BY WEIGHT

	2001	2010	2023
< 1.5T	5%	4%	1%
1.5T TO < 2.5T	59%	52%	40%
2.5T TO 3.5T	35%	43%	59%
> 3.5T TO 5T	0.2%	1%	0.3%
TOTAL	**100%**	**100%**	**100%**

Source: CCFA

► REGISTRATION OF NEW LIGHT COMMERCIAL VEHICLES BY ENERGY

	2010	2022	2023	
	%	%	units	%
DIESEL	98%	85%	292,224	77%
PETROL	1%	6.8%	42,567	11.2%
ELECTRIC	0%	4.8%	30,238	8.0%
OTHERS	0%	3.0%	14,182	3.7%
TOTAL	**100%**	**100.0%**	**379,211**	**100.0%**

CHARACTERISTICS OF THE HEAVY TRUCK MARKET IN FRANCE

The French market for new commercial vehicles weighing 5.1 tonnes or more increased by 11% in 2023 to 48,868 units. Shortages of raw materials and electronic components, which had a significant impact on delivery times in 2021 and 2022, were resolved in 2023. However, the market remains 11% below the record level of 2019.

The segment of carriers, which had been the most affected by delivery problems, increased by 9.9% to 20,443 units. The tractor market continues its recovery that began in 2021 and grew by 11.8% in 2023 to 28,425 units. In 2023, tractors will account for 58% of vehicle sales, compared with 48% in 2001.

The share of industrial vehicles over 16 tonnes has also increased over the last twenty years. It has risen from 80% of sales in 2001 to 90% in 2022 and reflects the efforts to standardise transport to reduce its environmental footprint. In 2023, however, vehicles over 16 tonnes grew less quickly (+6.3%) than the market. Vehicles under 16 tonnes, on the other hand, increased by 55%, reaching a record level of 6,681 vehicles.

Diesel engines continue to dominate the market, accounting for more than 92% of registrations. Sales of electric vehicles increased by 300% in 2023 but only represent 1.1% of the market. Registrations of NGV (natural gas vehicle) vehicles stagnated for the second consecutive year, due to the increase in prices linked to the war in Ukraine. They represent 3.5% of the market in 2023.

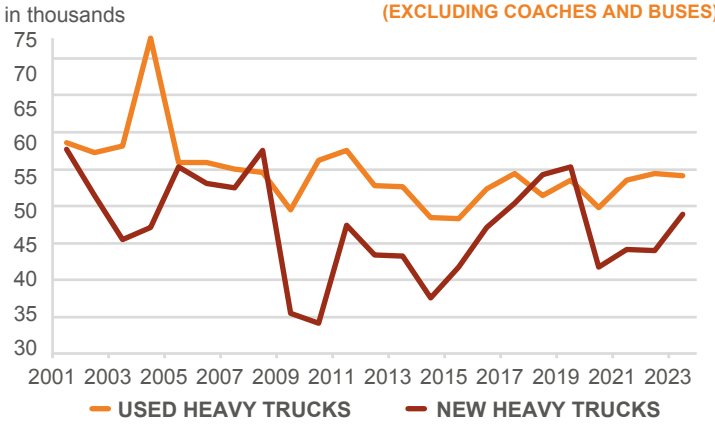
In 2023, the recovery in the new car market is accompanied by stagnation in the second-hand market (-0.6%), which stands at 54,155 vehicles.

In 2023, the ratio of used to new vehicles returned to its average level of around 1.1, compared with 1.5 during the 2009 crisis and 1.2 between 2020 and 2022.

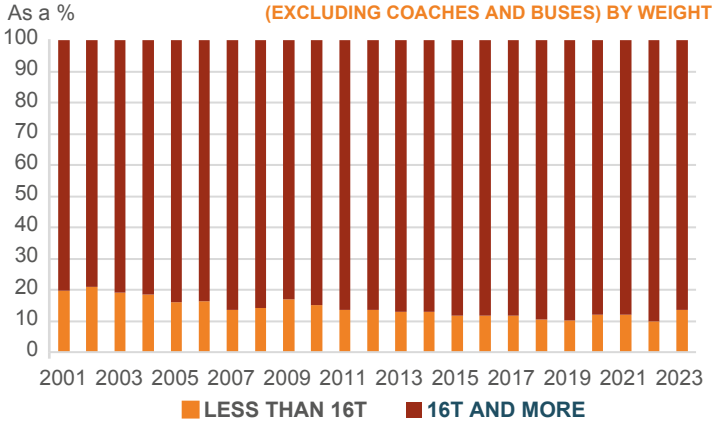
The Renault Trucks brand retained its leading position in France in 2023 with a market share of 27%. However, this was down by 2 points compared with 2022, in line with the decline in the weight of carriers in the total market.

27% **Renault Trucks' share of the market for industrial vehicles over 5 tonnes in France in 2023**

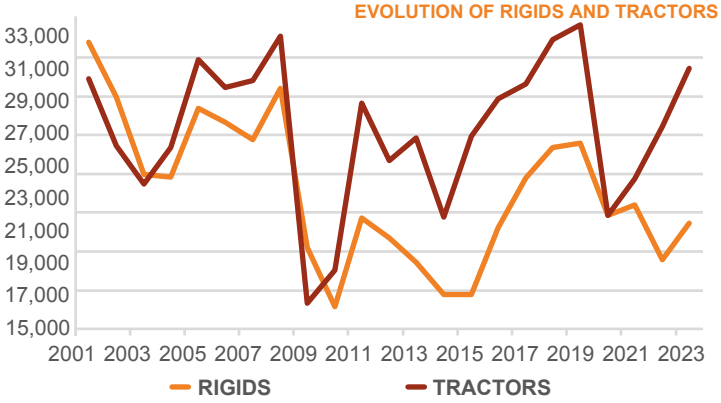
REGISTRATIONS OF INDUSTRIAL VEHICLES OVER 5.1 T (EXCLUDING COACHES AND BUSES)



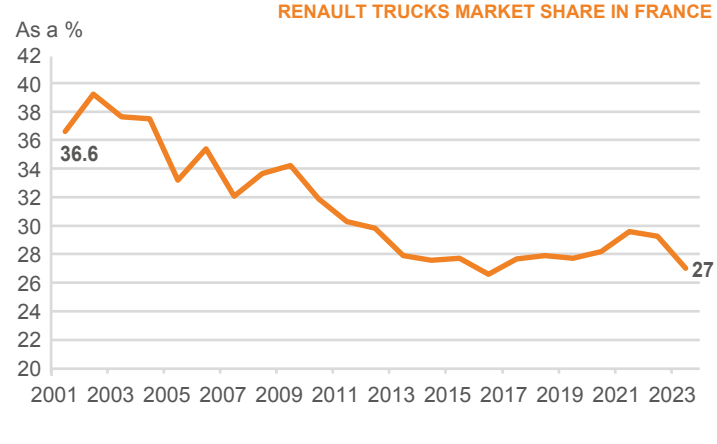
REGISTRATIONS OF INDUSTRIAL VEHICLES OVER 5.1 T (EXCLUDING COACHES AND BUSES) BY WEIGHT



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



RENAULT TRUCKS MARKET SHARE IN FRANCE



Source: CCFA

Commercial vehicles are defined as vehicles with a gross vehicle weight rating of 5.1 tonnes or more, intended for the transport of goods. A distinction is made between straight trucks and road tractors. They can be delivered with a body or in the form of a self-contained chassis that is subsequently fitted out by specialised manufacturers. Each truck is custom-built and is therefore a unique product. The rigid truck is designed to carry a container or heavy equipment on its chassis and comes in different categories depending on its use: tipper, van, flatbed, refrigerated, tanker. The road tractor is designed to 'tow' its trailer and is used more for long-distance transport. Tractors used for long journeys are equipped with numerous features to improve driver comfort: bunks, storage space, touchscreens, audio/radio systems and even refrigerators.

The tractor market, which represents approximately 56% of the industrial vehicle market, is more volatile than the carrier vehicle market. More intensively used (113,000 km per year, compared to 75,000 km for a rigid truck according to the CNR), tractors are replaced more frequently. Thus, the tractor fleet is half as old as the rigid truck fleet, with an average age of 5.5 years and 11 years respectively. However, sales of road tractors are also more strongly affected by the ups and downs of the economic situation and road haulage. In 2009, 2014 and 2020, the tractor market fell by 10 points more than the rigid truck market. In 2023, the rigid truck market recovered strongly.

Diesel engines continue to dominate the market at over 90%, but the supply of electric vehicles is growing and the CO_2 emission reduction targets set by the European Union are also helping to boost sales. In 2023, the market share of electric vehicles is 1.1%, compared with 0.3% in 2022. The various financial support measures in place in 2023 (depreciation, call for projects) are proving essential for the emergence of the market.

Renault Trucks opened the assembly line for the Renault Trucks E-Tech T and C, 44-tonne electric trucks, at the end of 2023 at the Bourg-en-Bresse (Ain) plant. The brand now offers a full range of 100% electric vehicles, ranging from 650 kg to 44 t, to meet the diverse needs of urban logistics (refrigerated transport, waste collection, distribution) and aims to achieve 50% of its volumes in battery electric by 2030. Its market share of electric vehicles reached 83% in 2023.

HOUSEHOLD MOTORISATION

In 2023, households motorisation rate (excluding large commercial vehicles) fell slightly to 84%. Multi-motorised households represent 36% of all households, a stable share compared to last year, after having increased continuously since 1980 (16% of households were multi-motorised). The proportion of households with three or more cars has also stabilised at 5% of all households, after increasing steadily (see page 93).

The type of municipality in which households live remains a key factor in the car ownership rate. In rural municipalities, the car ownership rate is increasing and will reach almost 95% in 2023. Conversely, in the Paris region, a densely populated area with a well-developed public transport network, the car ownership rate is falling and only two thirds of households have access to a car (66.2% in 2023). In the other major French conurbations with more than 100,000 inhabitants, the car ownership rate fell by one point in 2023 to 82%.

In line with the levels observed in peripheral or rural areas, the car ownership rate is also higher among manual workers (93%) and farmers (96.7% in 2023) than among higher socio-professional categories (85%) residing more in urban areas. The non-working population, including pensioners, also have a lower-than-average level of car ownership (around 80%), but the rate of car ownership among the over-65s has increased over the last twenty years and continues to grow.

The rate of driving licence ownership among individuals under the age of 25 remained relatively stable until 2018. From 2019, there was a decline among 18-21-year-olds, whose rate of ownership stood at 58% in 2023, compared with 66% in 2018. Among 22-24-year-olds, the decline in the possession rate began after COVID. It stands at 77% in 2023, compared with 86% in 2020. For the over-75s, it is tending to increase and stands at 92% in 2023.

84% **Household car ownership rate**

► MOTORISATION RATE (SHARE OF HOUSEHOLDS WITH AT LEAST ONE CAR) (AS A PERCENTAGE)

	1990	1995	2000	2010	2015	2023
ACCORDING TO SOCIO-PROFESSIONAL CATEGORY						
Farmers	95.9%	98.9%	91.1%	92.1%	88.0%	96.7%
Traders, craftsmen, business leaders	95.2%	89.4%	90.6%	91.1%	90.9%	81.4%
Liberal professions, senior executives	94.4%	85.5%	84.6%	84.1%	83.2%	84.1%
Intermediate professions, foremen	93.3%	88.7%	90.8%	89.8%	88.0%	91.6%
Employees	78.3%	75.9%	77.5%	82.5%	80.1%	82.6%
Workers	87.2%	89.7%	88.7%	91.2%	90.9%	93.0%
Inactive	54.6%	65.8%	70.9%	77.1%	77.6%	79.5%
including retirees	59.4%	70.9%	76.0%	80.1%	80.6%	84.0%
ACCORDING TO THE CATEGORY OF MUNICIPALITY						
Rural municipalities	82.1%	88.6%	91.1%	92.7%	92.9%	94.8%
Towns with fewer than 20,000 inhabitants	76.6%	84.7%	86.1%	90.2%	91.1%	89.9%
Towns with 20,000 to 100,000 inhabitants	77.3%	80.0%	84.2%	87.1%	87.8%	87.3%
Towns with more than 100,000 inhabitants	74.2%	75.1%	76.6%	80.8%	81.4%	82.2%
Paris metropolitan area	77.0%	60.8%	60.4%	63.6%	59.7%	66.2%
City of Paris	47.3%					
ACCORDING TO THE HABITAT CATEGORY						
City-center	-	67.6%	69.4%	73.0%	71.6%	73.9%
Suburb	-	79.3%	80.5%	83.2%	82.1%	83.2%
Peri-urban	-	88.5%	89.8%	91.6%	92.5%	92.4%
Rural	-	85.3%	90.4%	94.8%	94.4%	96.7%
ACCORDING TO THE AGE OF THE HEAD OF HOUSEHOLD						
Under 25	-	51.2%	49.3%	64.9%	74.0%	55.4%
25 to 34	-	85.1%	82.4%	83.9%	82.5%	85.3%
35 to 44	-	86.7%	86.3%	88.0%	87.3%	84.3%
45 to 54	-	87.5%	87.4%	88.1%	84.7%	85.6%
55 to 64	-	84.9%	87.0%	86.9%	85.1%	87.9%
65 to 74 years	-	61.9%	69.0%	76.2%	78.6%	85.6%
Over 75 years	-					78.9%
CARS WHOSE MAIN USER IS A WOMAN	-	-	**40.4%**	**41.5%**	**41.9%**	**41.3%**
ALL	**76.5%**	**78.4%**	**80.3%**	**83.5%**	**82.9%**	**84.3%**

Sources: INSEE jusqu'en 1993, KANTAR TNS PARC AUTO à partir de 1994

The car ownership rate is measured by the percentage of households with at least one car. After several years of decline, it has been increasing since 2015 (+2 points) but fell back one point in 2023 to 84%.

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

• The car ownership rate of households with an annual taxable income of between €7,500 and €11,000 was only 61% in 2023, while the most affluent households (€38,000 and over) had at least one car in 93% of cases.

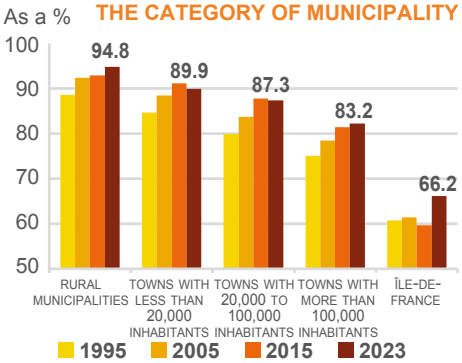
• The car ownership rate in cities with more than 100,000 inhabitants will be 82% in 2023, compared with 75% in 1995. After increasing in the post-COVID period in the largest conurbations (Paris, Lille, Lyon), it will fall significantly in 2023, particularly in the Lille and Lyon conurbations. It fell by five points in the Lille metropolitan area, to 87%, and by four points in the Lyon metropolitan area, to 76%. In the Paris metropolitan area, it fell by two points, to 66%.

• Rural households, large families, manual workers and farmers are very motorised categories (90%). In addition, their rates of multiple motorisations are also above average.

• The categories of employees and the inactive (including pensioners) are relatively less well equipped but, since 2000, their motorisation rate has been steadily increasing.

In 2010, among households without a vehicle, the proportion of households that had 'demotorised' was 45%, compared with 55% of households that had never owned a vehicle. Then, the share of demotorised households increased significantly, reaching 57% in 2017. Since then, the rate of demotorisation initially stabilised at around 55%, but in 2023 it fell by five points to 50%. This means that the proportion of households that have never owned a car is increasing. The main reason for not having a car is still the lack of a driving licence (cited by 47% of people, compared with 40% last year), followed by not needing one (42%). In third place, the high cost of use (29% of households without a car) is now a greater obstacle than the cost of purchase (26%), which was in third place last year. A preference for cycling or walking is now a reason for more people (+7 points to 29%) than a preference for public transport (28%). Among non-motorised households, 15% are considering motorising again in the next two years, an increase of 1 point compared to 2022.

MOTORISATION RATES ACCORDING TO THE CATEGORY OF MUNICIPALITY



HOUSEHOLD CAR FLEET

After steadily declining from the 2000s onwards, the daily or almost daily use of the car stabilised at over 70% until 2019. Having fallen by three points in the year of COVID, it has remained at around 68% since then, with the development of teleworking. In 2023, there was a slight increase in the proportion of vehicles in the fleet used daily or almost daily (69%, compared with 67% in 2022). The main reasons for car use are shopping (89% of vehicles) and leisure (77%). The proportion of vehicles used for commuting rises to 50.5% in 2023. Finally, 22% of vehicles are used to take children to nursery or school.

The average age of the household fleet stabilises in 2023 at a high level of 9.8 years, compared with 8.9 years in 2019. The vehicle ownership period continues to increase, reaching 6.3 years, compared with 5.5 in 2019.

The mileage of vehicles owned or made available to households reflects the ageing of the fleet, the weight of new registrations in the fleet, but also the intensity of vehicle use. In 2023, the mileage on the odometer of a petrol vehicle remains stable at 72,390 km, while that of a diesel vehicle continues to increase (140,490 km) with the low renewal of the diesel fleet. All energies combined, the average mileage on the clock will be 101,210 km in 2023, compared to 93,140 km in 2000. In recent years, the lower use of vehicles (10,840 km per year in 2023, compared with 13,670 km in 2000) has had a greater impact than the ageing of the fleet or the low number of new registrations.

Finally, the proportion of diesel vehicles in the fleet continues to fall with the decline in registrations, standing at 43.8% in 2023, compared with more than 60% in 2015. The proportion of petrol vehicles in the fleet is falling for the first year, standing at 43.8%.

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

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

	units	1990	2000	2010	2015	2019	2020	2022	2023
Total	millions	23.0	27.4	33.6	34.1	36.1	36.2	36.1	36.0
Average age	year	5.8	7.3	8.0	8.9	8.9	9.0	9.8	9.8
Average holding period	year	3.7	4.4	5.0	5.5	5.5	5.6	6.2	6.3
FLEET DISTRIBUTION BY AUTOMOTIVE GROUP									
Renault Group	%	33.3	33.3	28.6	28.3	27.6	27.1	27.0	26.2
PSA Group before 2021, Stellantis excluding FCA otherwise	%	38.3	35.2	38.2	36.5	39.2	38.5	37.0	37.1
Foreign brands	%	28.4	31.4	33.2	35.2	33.2	34.4	36.0	36.7
FLEET DISTRIBUTION BY TAX POWER									
2 & 3	%	3.4	0.7	44.4	49.2	51.7	50.9	51.2	52.2
4 & 5	%	38.4	40.5						
6 & 7	%	47.1	50.0	42.5	39.0	35.7	36.6	35.7	35.7
8 & more	%	12.8	8.8	13.1	11.8	12.6	12.5	13.1	12.2
FLEET DISTRIBUTION BY RANGE									
Small cars	%	39.4	45.1	46.8	49.3	47.7	48.5	48.0	47.8
Low-mid	%	20.8	27.3	30.9	29.2	25.7	23.6	22.0	21.4
High-mid	%	26.0	19.9	11.5	7.9	4.9	5.1	5.0	4.1
Premium	%	8.7	7.0	5.0	3.0	2.3	2.1	2.0	1.9
Others	%	5.1	0.8	5.7	10.6	18.5	20.7	24.0	24.8
Share of cars purchased new	%	50.4	43.9	41.1	41.5	41.8	41.5	40.4	40.7
FLEET DISTRIBUTION BY FUEL USED									
Super unleaded - Petrol	%	15.3	49.1	40.1	38.8	46.0	46.0	49.8	49.2
Super leaded - ARS	%	62.1	11.9						
Diesel	%	17.2	38.1	59.9	61.2	54.0	52.0	46.7	43.8
Kilometres on clock	km	69,500	93,140	103,470	105,590	102,120	99,670	101,360	101,210
Share of vehicles used every day or almost every day	%	75.1	78.7	71.8	71.9	69.0	67.3	67.0	68.8
Share of vehicles used for the home-work journey	%	55.4	55.1	53.7	52.2	52.0	52.3	51.0	50.5

Note: From 2007, the years are not directly comparable to previous years; the scope of light commercial vehicles has been expanded.
(1) From 2017, Opel is integrated into the PSA group.
Sources: INSEE until 1993, KANTAR TNS PARC AUTO from 1994

The CAR FLEET survey, conducted by KANTAR TNS every year, provides a detailed description of the car fleet owned or available to households.

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

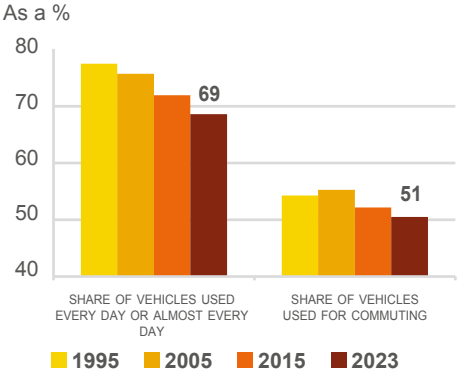
The low level of new vehicle registrations over the past three years has had an impact on the average age of vehicles in the fleet, but this stabilised in 2023 thanks to the recovery of the market. The average age of petrol vehicles, which had been steadily increasing since 2020 from 8.5 years to 9.3 years in 2022, fell for the first time in 2023 (9.2 years), thanks to the dynamism of petrol registrations (+13% in 2023). The average age of the diesel fleet, meanwhile, continues the rise that began in 2009, reaching 11.1 years in 2023, compared with 6.8 years in 2008. The proportion of vehicles more than 5 years old will increase by a further 2 points in 2023 to 72% of the fleet. Vehicles more than 10 years old, which now represent 37% of the fleet, will remain stable in 2023, but those between 5 and 10 years old will increase by 1 point to 34% of the fleet.

The most common engine sizes are between 2 and 5 horsepower, and their share increases slightly in 2023 to 52% of the fleet. Lower-end and lower-middle-end cars represent 48% and 22% of the fleet respectively in 2023. The share of cars in the miscellaneous range, consisting mainly of 4WDs and SUVs, continues to grow strongly and amounts to 25% of the fleet in 2023, compared with 10.6% in 2015.

The number of cars in the fleet equipped with automatic transmissions and emergency systems (E-Call) continues to increase. In 2023, 23% of cars are equipped with an automatic gearbox and 13% with an E-Call system. Speed limiters/cruise control are now fitted in 70% of cars on the road and emergency brake assist in 44%. Finally, electronic stability control (ESC) is present in 36% of cars on the road.

Regarding vehicle use, the behaviours that emerged during COVID seem to be here to stay, with the proportion of vehicles used every day or almost every day only slightly increasing. In terms of driving frequency, the proportion of regular drivers is broadly stable at 75% (73% in 2007). In the Paris conurbation, this frequency is only 56% and is tending to decrease in inner Paris (20% in 2023, compared with 31% in 2007) and the inner suburbs (49% in 2023, compared with 56% in 2007). Conversely, in the other areas, including the large conurbations, regular driving is increasing 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.

USE OF VEHICLES



DOMESTIC PASSENGER TRANSPORT

In 2023, domestic passenger transport, all modes combined, declined slightly (-0.6%) to 1032 billion passenger-kilometres, a level that is still below that of before the crisis (-4.3% compared to 2019).

Expressed in passenger-kilometres and limited to domestic transport, road travel remains predominant. However, for the third consecutive year, the share of private cars has declined and now stands at 82%, five points lower than in 2020. This decline is to the benefit of rail transport, whose modal share has increased by almost 4 points compared to 2020 and amounts to 11.3% in 2023. The share of buses, coaches and trams also increases in 2023 to 5.2%, while domestic air transport remains stable (1.3% of the modal share).

In 2023, mobility by private car, expressed in passenger-kilometres, fell by 1.6% after two years of sustained growth. It stands at a level approximately 5% lower than its pre-crisis level.

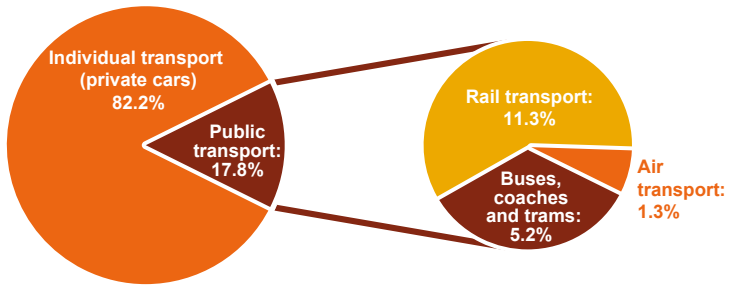
Public road transport, which includes coaches, buses and trams, continued to grow in 2023 (+12%), but is still 11% below its 2019 level. In Île-de-France, however, bus network activity has been penalised by the shortage of drivers. The three years of consecutive growth have not yet made up for the sharp decline in 2020 (-40%) linked to travel restrictions.

Rail travel, which includes journeys by train (TGV, TER, RER) and by metro, continued to grow in 2023 and is the only mode of transport that has gained passenger-kilometres compared to 2019 (+6.4%). It was severely impacted by the COVID crisis in 2020 (-42%) but benefited in the following two years from growth of more than 30%, driven by TGV traffic and the increase in the long-distance offer (Sud-Europe Atlantique, Bretagne-Pays de la Loire lines) and on the Île-de-France network (tram line).

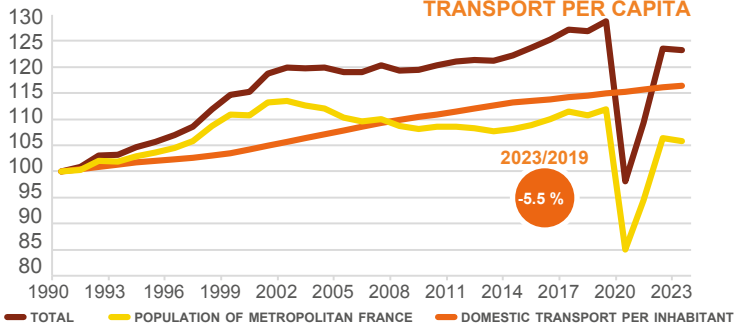
Finally, air transport, which had lost half of its traffic and reached a historically low number of passengers in 2020, fell by 2% in 2023, after two years of strong growth (of more than 30% each year). The number of passenger-kilometres for air transport therefore remains more than 18% lower than in 2019.

-0.6% Domestic passenger transport down in 2023

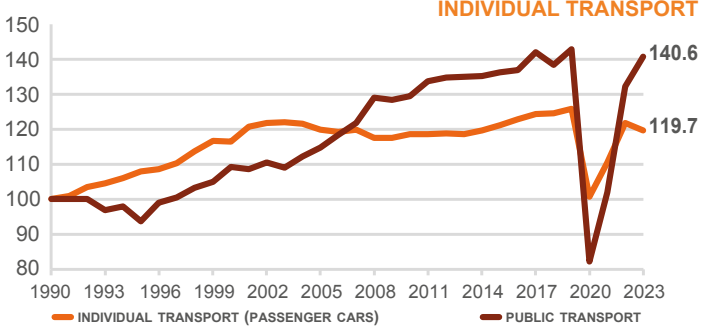
DISTRIBUTION OF DOMESTIC PASSENGER TRANSPORT BY MODE IN 2023



EVOLUTION OF DOMESTIC PASSENGER TRANSPORT PER CAPITA



EVOLUTION OF COLLECTIVE AND INDIVIDUAL TRANSPORT



Sources: MTE/SDES, INSEE

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

While the transport of goods is more closely linked to the productive sphere, whether industrial, artisanal or agricultural, the mobility of people covers a much broader economic field. Commuting is an important part of this, but the development of the economy, including the tertiary sector, is also dependent on the mobility of people (health services, leisure, tourism, etc.).

The determining factors in the choice of transport modes are the origin-destination, the distance, the time and individual constraints (volumes transported, timetables, etc.). The development of new individual transport services also broadens the modal choice.

Passenger transport requires significant investment in each mode, generally amortised over a long period, to build and maintain the infrastructure.

When mobility is expressed in passenger-kilometres, light vehicles appear to dominate domestic passenger transport. Expressing it in terms of the number of daily trips, particularly in dense urban areas where public transport and other modes (bicycles, motorbikes, etc.) play an important role, or in passenger-kilometres for long-distance international travel, shows the relevance of each mode and how they complement each other.

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

The crisis of 2020 marked a historic break, with a 24% decline in per capita flows. These then rose again in 2021 and 2022, but stabilised in 2023, approaching the level observed in 2019.

DOMESTIC FREIGHT TRANSPORT

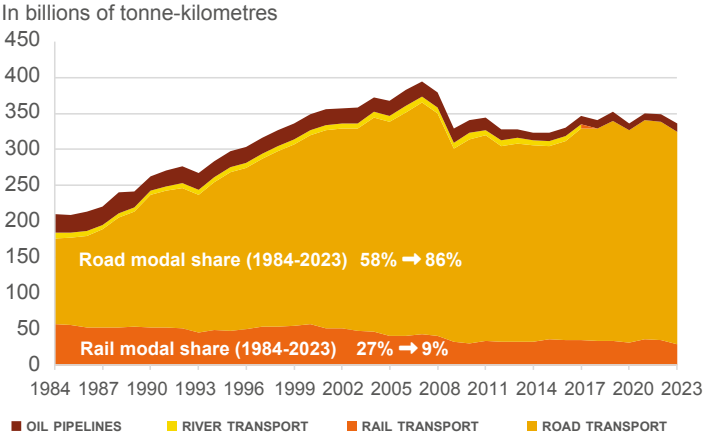
Domestic freight transport (including oil pipelines) fell by 4% in 2023 to 341.8 billion tonne-kilometres. Road transport remains the main mode of transport used, with 86% of tonne-kilometres transported in 2023. It meets many of the criteria involved in modal choice and is suitable for the majority of flows. Indeed, 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 haulage has gone through various phases. In 2009, it was strongly impacted by the economic crisis and reached a low point of 284 billion tonne-kilometres. After a rebound in 2010-2011, the decline continued (-1.5% per year) until 2015, in line with the decline in French-flagged activity in favour of foreign-flagged activity. Then, from 2016, the economic recovery allowed for a return to growth (4% per year), which was interrupted by the Covid crisis. Since then, despite growth in activity in 2021, road haulage has declined in 2022 (-0.6%) and 2023 (-2.3%), reaching 295.5 billion tonne-kilometres, 3.4% below its 2019 level.

Rail transport, which had regained market share in 2021 (with a 10% modal share), declined in 2022 (-1.4%) and in 2023 (-17%) and now represents only 29.4 billion tonne-kilometres, its lowest level ever recorded. The strikes of spring 2023 and the high price of electricity penalised the use of this mode of transport. As for river transport, it fell by 10.2% in 2023, impacted for the second consecutive year by an unfavourable economic situation, particularly in the cereal sector and various raw materials.

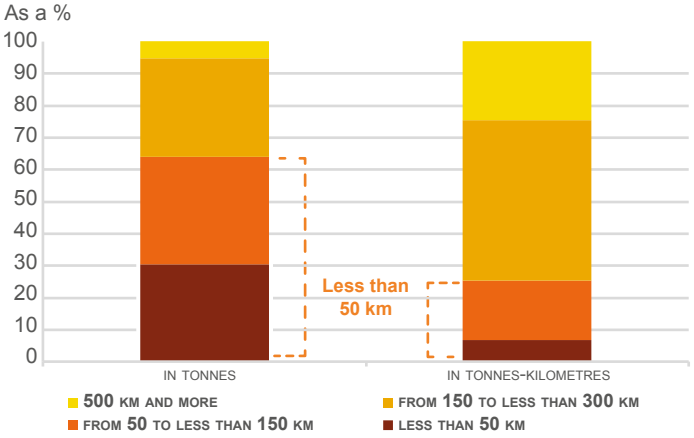
86% **Share of road transport in overland freight transport measured in tonne-kilometres in 2023**

DOMESTIC TRANSPORT OF GOODS IN FRANCE



Source: MTE/SDES

DISTRIBUTION OF ROAD FREIGHT TRANSPORT CARRIED OUT BY THE FRENCH FLAG ACCORDING TO THE DISTANCE LOADED IN 2021



Source: MTE/SDES, Road Freight Haulage survey

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

The physical transfer of goods and assets exported by a country is one aspect of economic competitiveness. To stand up to the competition and facilitate export activity, the social security and tax burden on the road transport sector, whether general or specific (fuel tax), must be close to that in force in other European countries.

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

Domestic demand from the various economic agents covers a wide variety of goods and commodities. This demand is met by national (self-)production or by imports. Transport makes it possible to physically link the places of production to each other, then to the places of consumption and finally to the places of reprocessing and recycling: in France, the interaction with regional planning is more significant.

Due to the wide variety of goods and merchandise, many factors come into play and can influence the choice of mode of transport. This is the case for:
- the weight of the goods: car manufacturers mainly have their steel coils transported 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 transported by road;
- the place of departure and arrival of the goods, both during the production phase (link with town and country planning) and during the consumption phase. The latter mainly takes place in urban areas, due to where households live.

In addition, the various modes of transport require infrastructure, which means significant investment, generally amortised over a long period, and which must be used wisely. Intensive use, i.e. the massification of flows, is more relevant. The same is true if, during a transport chain, several modes are used, due to the transhipments between these different modes.

Road haulage, with its ability to irrigate the capillarity of the road network, its flexibility, its capacity to adapt and its quality of service, meets these numerous criteria, which show that transport is not a homogenous whole, but a multitude of sub-markets, which are often not interchangeable. Also, modal shift is not feasible 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 modes of transport. The energy transition of road freight transport will have to fit into this framework.

Without considering the geographical location of the points of departure and arrival, there are two main units for measuring goods transport: the tonne measured at the time of loading and the tonne-kilometres. Road transport remains predominant in goods transport, with a modal share of 87% of tonne-kilometres travelled.

ROAD TRAFFIC

In 2023, road traffic decreased by 1.6% to 604 billion vehicle-kilometres. After sustained growth between 1990 and 2002 (an average of 2.3% per year), it slowed significantly between 2002 and 2019 (0.7% per year), before collapsing in 2020 (-18%) with the travel restrictions linked to the health crisis. Then, a catch-up took place in 2021 and 2022 with a growth in traffic of around 9% each year. In 2023, this movement was interrupted and traffic declined. It remains 4.5% below its 2019 level.

Light vehicles travelled 565 billion vehicle kilometres, or 93% of total traffic. Among light vehicles, French-registered passenger cars accounted for 77% of vehicle kilometres, while French-registered commercial vehicles accounted for 15%, with foreign light vehicles and motorised two-wheelers making up the rest. In 2023, all categories of vehicles are affected by the decline in traffic. Heavy goods vehicles, which had slowed down since 2018 due to the economic downturn and had been less impacted in 2020, increased by 1.5% in 2022, but fell again in 2023 (-1.7%).

At the end of 2023, 35% of the private car fleet will have a Crit'Air 1 and E sticker. For heavy goods vehicles, 63% of the fleet will have a Crit'Air 2, 1 or E sticker. Their virtuous presence in traffic is even more important as they drive more than older vehicles.

-1.6% **Road traffic down in 2023**

► ROAD TRAFFIC

	1990	2000	2012	2019	2020	2022	2023	Average annual variation as a %		
								2012/1990	2023/2012	2023/2022
FLEET(annual average in thousands of veh.)	**28,016**	**33,528**	**40,824**	**43,999**	**43,898**	**44,739**	**44,958**	**+1.7**	**+1.0**	**+0.5**
Cars	23,327	28,067	34,725	37,222	37,175	37,819	37,992	+1.8	+0.9	+0.5
Petrol	19,753	18,209	13,040	14,862	15,436	17,130	18,050	-1.9	+3.3	+5.4
Diesel	3,574	9,859	21,685	22,361	21,739	20,689	19,942	+8.5	-0.8	-3.6
Non-rechargeable hybrids	-	-	21	416	533	1,079	1,432	-	+52.7	+32.7
Rechargeable hybrids	-	-	28	74	108	353	488	-	+33.0	+38.2
Electric & other energies (excluding LPG)	-	-	11	123	184	482	701	-	+51.4	+45.3
Light commercial vehicles (LCV)	4,089	4,830	5,435	6,091	6,039	6,222	6,264	+1.3	+1.4	+0.7
Petrol	2,111	1,168	314	274	276	326	379	-8.3	+1.9	+16.2
Diesel	1,978	3,662	5,121	5,817	5,762	5,891	5,879	+4.4	+1.4	-0.2
Hybrids and gas	-	-	21	20	22	37	47	-	+8.4	+25.0
Electric & other energies (excluding LPG)	-	-	7	39	45	65	86	-	+28.4	+32.2
French flag heavy goods vehicles (>5t)	536	554	583	597	596	608	612	+0.4	+0.5	+0.6
French flag buses & coaches	64	76	81	88	88	90	90	+1.1	+1.0	-0.0
AVERAGE ANNUAL MILEAGE (in thousands of km)										
Cars	13.63	13.93	12.81	12.54	10.17	11.94	11.69	-0.3	-0.9	-2.0
Petrol	11.96	10.74	8.24	9.21	7.54	9.75	9.78	-1.7	+1.7	+0.3
Diesel	22.40	19.73	15.55	14.76	12.04	13.75	13.42	-1.6	-1.5	-2.4
Non-rechargeable hybrids	-	-	16.73	16.16	12.57	16.12	16.14	-	-0.4	+0.1
Rechargeable hybrids	-	-	16.92	16.61	13.09	18.37	18.57	-	+0.9	+1.1
Electric & other energies (excluding LPG)	-	-	7.18	11.30	9.30	12.57	12.79	-	+5.9	+1.8
Light commercial vehicles (LCV)	14.85	16.15	14.60	14.26	12.56	13.68	13.39	-0.1	-0.9	-2.1
Petrol	9.87	9.00	5.19	6.60	6.49	8.38	8.82	-2.9	+5.4	+5.3
Diesel	20.11	18.42	15.18	14.62	12.85	13.97	13.68	-1.3	-1.0	-2.1
Hybrids and gas	-	-	9.29	10.67	10.36	15.05	16.16	-	+5.7	+7.4
Electric & other energies (excluding LPG)	-	-	5.79	7.73	6.84	7.76	7.70	-	+2.9	-0.8
Heavy goods vehicles (>5t)	42.44	48.11	45.07	44.52	41.42	43.99	42.90	+0.3	-0.5	-2.5
Buses and coaches	31.64	30.64	33.60	33.51	25.10	31.93	32.44	+0.3	-0.4	+1.6
UNIT CONSUMPTION (litres per 100 km)										
Petrol cars	8.68	8.12	7.61	6.90	6.83	6.75	6.74	-0.6	-1.2	-0.2
Diesel cars	6.73	6.74	6.35	5.96	5.94	5.94	5.93	-0.3	-0.7	-0.1
Petrol LCVs	9.39	9.22	7.91	7.60	7.52	7.50	7.49	-0.8	-0.5	-0.2
Diesel LCVs	9.77	9.35	7.93	7.80	7.77	7.76	7.75	-0.9	-0.2	-0.1
Heavy goods vehicles	36.23	36.62	34.97	33.32	32.98	32.64	32.10	-0.2	-0.9	-1.6
Buses and coaches	32.00	32.99	32.78	30.72	30.41	30.19	29.70	+0.1	-1.0	-1.6
FUEL CONSUMPTION (ALL ROAD TRANSPORT) (in millions of litres)										
Petrol	23,863	18,217	9,632	10,864	8,949	12,115	12,366	-4.0	+2.5	+2.1
Diesel	19,515	32,731	41,052	40,246	33,578	36,695	35,096	+3.4	-1.6	-4.4
Total	43,378	50,948	50,684	51,110	42,527	48,810	47,462	+0.7	-0.7	-2.8
TOTAL TRAFFIC (1) (2) (in billions of vehicle-km)	**425**	**528**	**595**	**633**	**518**	**614**	**604**	**+1.5**	**+0.2**	**-1.6**
Light vehicles (1) (2)	397	492	558	592	481	574	565	+1.6	+0.1	-1.7
Including French flag cars	310	383	436	459	372	444	437	+1.6	+0.0	-1.6
Including French flag light commercial vehicles	65	78	79	87	76	85	84	+0.9	+0.6	-1.5
French flag heavy goods vehicles	22.5	26.3	25.5	26.0	24.1	26.1	25.6	+0.6	+0.0	-1.7

(1) Including vehicles registered abroad.
(2) Including motorised two-wheelers.

Source: MTE/SDES/CCTN

Road traffic is estimated by cross-referencing 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 balance has been based on the new SDES road vehicle register (RSVERO), which combines information from registration certificates and roadworthiness tests. Long series have been reconstructed, and estimates are updated from one year to the next.

In 2023, the number of vehicles registered in France is estimated at 45 million, an increase of 0.5%. The number of diesel cars in the fleet continues to decline (-3.6%) and now represents 52.5% of the total. In traffic, this share is higher (59.4%), due to more intensive use of vehicles, but it has been steadily decreasing since 2014 with the trend towards ageing diesel cars and the decrease in average annual mileage. Petrol engines, on the other hand, are increasing in the fleet and in traffic, with vehicles getting younger and an increase in average mileage. However, from 2022, this trend will slow with the development of other engines, particularly hybrids, which will account for a growing share of traffic (7.4% in 2023, compared with 3.6% in 2021) and the fleet (5.1% in 2023, compared with 2.6% in 2021). Fully electric and other types of motorisations (excluding LPG) now account for 1.8% of the fleet and 2% of traffic.

Improvements in engine technology have narrowed the gap in fuel consumption between petrol and diesel cars. From 2 litres in the early 1990s, it has now fallen to less than one litre. Since 2015, the fuel consumption of petrol and diesel cars has fallen by 7.6% and 3.1% respectively. In 2023, the unit consumption of a petrol car is 6.8 litres per 100 km, that of a diesel car 5.9 litres per 100 km.

The heavy goods vehicle fleet has been growing again since 2015 and continues to grow in 2023 (+0.6%). The unit consumption of lorries has been falling steadily since 2015 (-7%) and this continues in 2023 (-1.6%). The lorry fleet has also been transformed and includes 63% of EURO VI standard vehicles at the end of 2023 (85% for tractors). There is also a steady increase in the proportion of vehicles over 19 tonnes in the carrier fleet (65% by the end of 2023, compared with 57% in 2011). The rejuvenation of the vehicle fleet, as well as the increase in their load capacity, contribute to optimising the energy efficiency of road haulage.

ROAD TRAFFIC AND CO_2 EMISSIONS

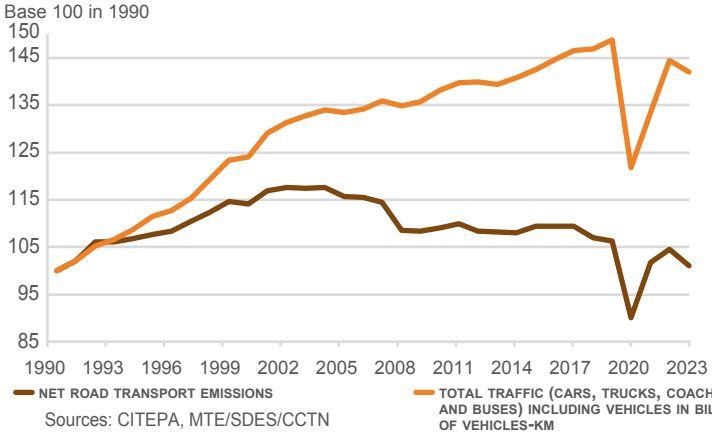
After a historic decline in 2020 in the context of the health crisis, road traffic and associated CO_2 emissions rebounded in 2021 and 2022, but fell in 2023. Road traffic fell by 2% to its 2015 level. At the same time, CO_2 emissions from road transport fell by 3% year-on-year and are down by 7.5% compared to 2015. Since 1990, total traffic by French and foreign vehicles on French territory has increased by 42%; their associated CO_2 emissions, net of renewable energy, have only increased by 1%.

Various factors are behind the improvement in energy efficiency. The first is the fall in the average unit consumption of private cars in circulation and registered in France, which has declined by 24% since 1990. This is the result of the switch to diesel vehicles between 1990 and 2015, the bonus/penalty system introduced in 2008 and the efforts of manufacturers and drivers. The trend was briefly interrupted in 2017, but in 2018, the consumption of private cars fell again, mainly thanks to the greater efficiency gains of petrol compared to diesel. Progress in relation to the increasing hybridisation of vehicles is continuing: unit consumption has fallen from 6 l/100 km in 2017 to 5.9 litres in 2023 for diesel, and from 7.1 l/100 km in 2017 to 6.7 litres in 2023 for petrol. However, the growing share of petrol cars in the fleet and on the road is weighing on the average unit consumption of a vehicle in the fleet, which stands at 6.2 litres per 100 km in 2023. Furthermore, the development of electric cars, which emit no CO_2, is starting to become a factor in reducing emissions. They represent about 2% of traffic. This factor will continue and increase, but its impact on the reduction of CO_2 emissions will be slow.

Energy efficiency in goods transport continues to improve. According to the latest estimates, the amount of CO_2 emitted by an industrial vehicle when transporting one tonne of goods over one kilometre in France fell by 26% between 1990 and 2023. This progress is mainly due to improvements in vehicle performance (better engine efficiency, increase in vehicle size allowing for massification), optimisation of logistics (increase in filling rate, decrease in empty returns) and the dissemination of good eco-driving practices.

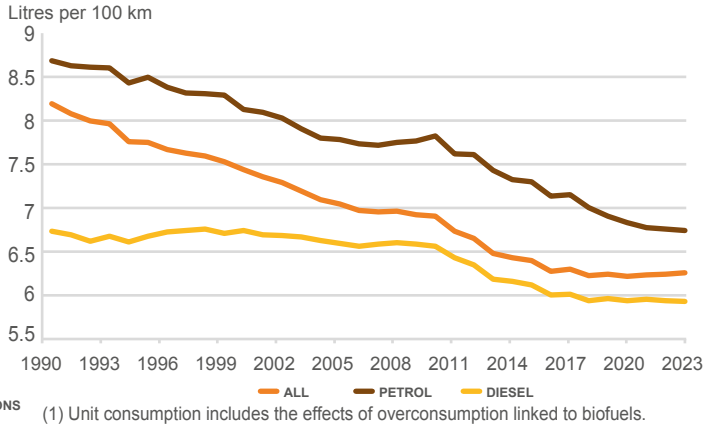
-24% **Average unit consumption of a passenger car on the road since 1990**

VEHICLE TRAFFIC IN FRANCE AND ASSOCIATED CO_2 EMISSIONS NET OF RENEWABLE ENERGIES



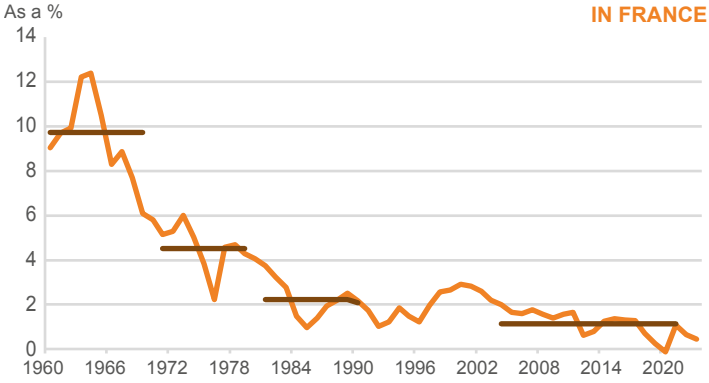
Sources: CITEPA, MTE/SDES/CCTN

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



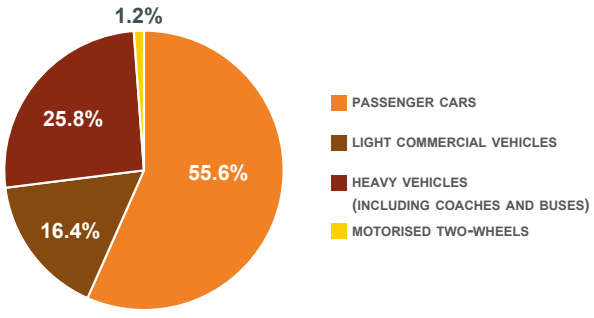
(1) Unit consumption includes the effects of overconsumption linked to biofuels.
Source: Road traffic report (MTE/SDES)

ANNUAL GROWTH RATE OF THE PASSENGER CAR FLEET IN FRANCE



Sources: CCFA, MTE/SDES

DISTRIBUTION OF CO2 EMISSIONS FROM ROAD TRANSPORT IN 2023 (AS A %)



Source: Citepa / Secten (2024 Edition)

The circulation of private cars is the result of two components: the number of cars and their average annual mileage. Over a long period, the growth rate of the fleet slowed down sharply after the phase of access to motorisation. It went from an average annual growth of 9.7% between 1957 and 1970 to 4.5% and then 2.2% in the 70s and 80s respectively. Since 2004, the average annual growth rate has been 1.3%, slowing sharply 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, the average annual mileage had fallen by 0.6% per year. After a very sharp decline in 2020, in 2023 it remains 6% lower than in 2019.

In 2023, new estimates from the Centre Interprofessionnel d'Etudes de la Pollution Atmosphérique (CITEPA) for road transport show CO_2 emissions net of renewable energy at 116 million tonnes, compared with 126 in 2019. After the ceiling observed in the early 2000s, at around 135 million tonnes, a sharp decline was recorded from 2004 to 2009, linked, among other things, to the effects of the economic crisis, followed by a stabilisation at around 130 million tonnes 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%). After an increase in 2021 and 2022, the level of emissions fell again in 2023 by 5%, due to a decline in traffic and the spread of vehicles with a low environmental footprint, with electric vehicles accounting for around 1.5 million tonnes of CO_2 saved annually.

In 2023, according to CITEPA, the net CO_2 emissions from renewable energy in road transport were distributed as follows: 56.6% for cars, 16.4% for light commercial vehicles, 25.8% for heavy goods vehicles and buses and coaches, and 1.2% for motorised two-wheelers.

NEW USES FOR THE AUTOMOBILE

Technological developments, economic constraints and growing awareness of environmental issues have encouraged the development of new consumption trends and lifestyles in several sectors, favouring the use of goods over their ownership.

In transport, this trend has materialised in the development of new uses for cars, favouring sharing and pooling based on the use of information and communication technologies. Carpooling, car sharing and peer-to-peer car rental are part of these new consumer practices.

Car sharing reduces vehicle usage and maintenance costs and increases the transport offer in suburban and rural areas, at a lower cost to the community. In densely populated areas, it also complements public transport (loads to be transported, staggered timetables), which improves vehicle occupancy rates, with positive effects on the environment and energy consumption.

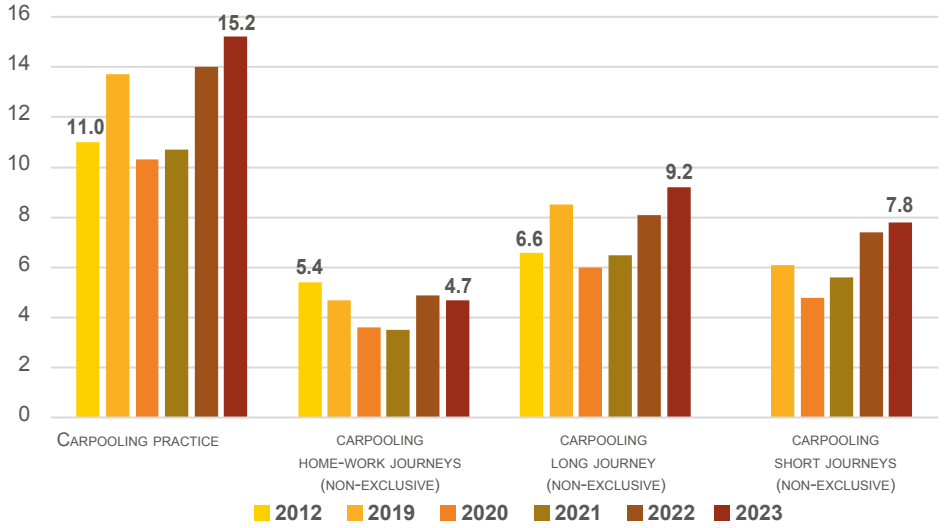
Among the developments, there has also been a strong growth in chauffeur-driven cars, which have supplemented the offer of private public passenger transport, as well as the development of new services around mobility (passenger information, route calculations, ticketing, parking assistance).

Car manufacturers have adapted their offerings to these new needs and are positioning themselves as true mobility operators, creating new entities and brands dedicated to these activities (Mobilize, Free2Move) and offering a whole range of new services in France and abroad: short-term rentals, car-sharing for businesses or individuals, free-floating, but also rental services with a driver (taxis, private hire vehicles) and MAAS (Mobility As A Service) platforms, which combine multimodal information and ticketing tools. They have also invested in companies linked to mobility and connected services: acquisition of Share Now for Stellantis, acquisition of and equity investment in various start-ups (Karhoo, iCabbi, Glide.io, Bipi) for Renault.

15% **Respondents who carpooled in 2023 (Car Fleet Survey)**

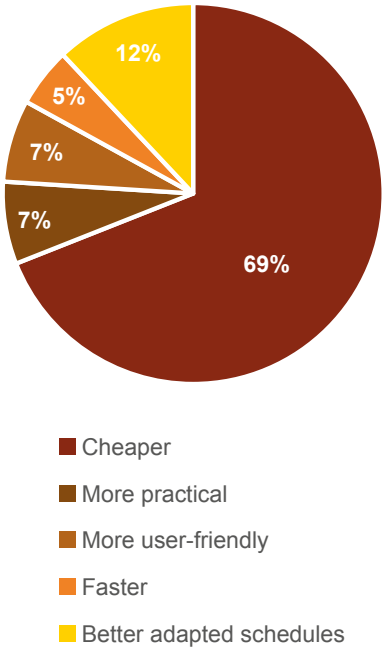
SURVEY ON THE PRACTICE OF CARPOOLING OVER THE LAST 12 MONTHS

As a % of respondents



Source: PARCAUTO TNS Sofres survey processed by CCFA and IFSTTAR

MAIN MOTIVATION FOR CARPOOLING (6T, 2015)



Source: 6t/ADEME

CARPOOLING

Car sharing is defined in the Energy Transition for Green Growth Act as 'the shared use of a motorised land vehicle by a driver and one or more passengers, free of charge, except for the sharing of expenses, as part of a journey that the driver makes on their own behalf. Putting them in touch with each other for this purpose may be done for a fee' (Art. L. 3132-1). The Mobility Framework Act (LOM), enacted at the end of 2019, has strengthened support for carpooling by encouraging the creation of lanes reserved for carpoolers, authorising local authorities to pay an allowance to drivers or passengers and creating the sustainable mobility package. This scheme allows a public or private employer to provide financial assistance for its employees' home-to-work travel by means other than public transport, in particular shared modes such as carpooling.

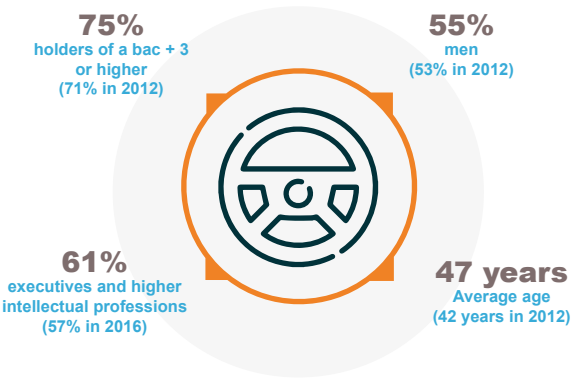
According to the Car Fleet survey, carpooling, which had declined in 2020 due to the health crisis, has been on the rise again since 2022. In 2023, 15.2% of respondents carpooled in the past 12 months, compared with 14% in 2022. 4.7% of respondents carpooled for their commutes (compared to 4.9% in 2022), 9.2% for journeys over 100 km (compared to 8.1% in 2022) and 7.8% for journeys under 100 km (compared to 7.4% in 2022). The main motivation is economic (for 58.4% of respondents), the second is conviviality (50% of respondents). For short journeys (including the home-work commute), carpooling is mainly done with friends and family. This concerns 82% of carpoolers for the home-work commute (compared to 83% in 2022) and 80% for short journeys (compared to 82% in 2022). For long journeys, carpooling through a networking organisation is the most common method, although in 2023 carpooling with friends and family increased in popularity in this niche. 47% of people carpooled with friends and family for long journeys, compared with 44% in 2022. The use of financial compensation is directly linked to the carpooling method, which is therefore more common for long journeys. In 2023, 71% of carpoolers for long journeys used it, compared with 34% for short journeys (compared with 74% and 29% respectively last year).

At the end of 2022, the State launched a major national plan for everyday carpooling. It has set itself the target of tripling the number of daily carpooling trips to 3 million by 2027. The three flagship measures implemented in 2023 have been extended for one year: a bonus of 100 euros for first-time drivers (200,000 new drivers in 2023), state funding of 50% of the costs of financial incentives for carpooling for local authorities, a Green Fund to help local authorities finance carpooling areas and lines (200 projects in 2023, including 93 areas and 21 lines).

Carpooling is also developing within companies thanks to the Sustainable Mobility Package (FMD), which allows employers to contribute to the home-work travel expenses of their employees who use alternatives to the car and public transport (cycling, carpooling, car sharing). According to the 3rd FMD barometer, 36% of employers offer carpooling.

NEW USES FOR THE AUTOMOBILE

PROFIL OF USERS IN 2019



CARSHARING RENTALS IN 2019

54% of rentals take place during the week

€51 / €30 Average and median cost of a rental (€56 / €28 in 2016)

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

Source: National Survey on Car Sharing, 6t/ADEME, 2012, 2016, 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, office 6t / Ademe, 2019

26 Number of car-sharing operators in 2023 (Car-sharing Barometer 2023)

CAR-SHARING

Car sharing is defined in the Grenelle II law (article 54) as the pooling of a vehicle or a fleet of motorised land transport vehicles for the benefit of users who are subscribers or authorised by the 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 period of time. A distinction is made between P2P car sharing (rental between private individuals) and commercial car sharing B2B (intended for company employees) or B2C (intended for private individuals).

The Mobility Framework Act, passed at the end of 2019, provided a legal framework for car-sharing by giving the mobility organising authorities (MOAs) the means to regulate self-service modes of transport in their territory. They can do this by granting, through a 'car sharing label', parking spaces reserved for car sharing vehicles, if they comply with the conditions defined by the AOM (type of authorised vehicles, minimum number of rentals per month, etc.). In addition, as with carpooling, the law has made it possible for the costs incurred in car sharing to be covered by the sustainable mobility package.

According to the results of the 2023 National Car-sharing Barometer, produced by the Association des Acteurs de l'Autopartage (Association of Car-sharing Stakeholders) and the Laboratoire Aménagement Économie Transport (LAET) (Transport Economics and Planning Laboratory), carsharing would be up 43% year-on-year, for the 26 operators present in France as at 1 January 2023 and 460,000 active users. 186 new municipalities offer a carsharing service in 2023, bringing the total number of municipalities served to 926 (including 770 urban municipalities). There are 15 operators offering a 'closed-loop' car-sharing service (collection and return of the vehicle to a station, by reservation and for a defined period), 4 operators offering free-floating (without reservation, without station) and 7 operators offering both. Loop car sharing continues to dominate the market in terms of number of vehicles (4 out of 5) and number of users (8 out of 10). In free-floating services, 79% of the vehicle fleet is made up of electric vehicles, compared with 8% in loop services.

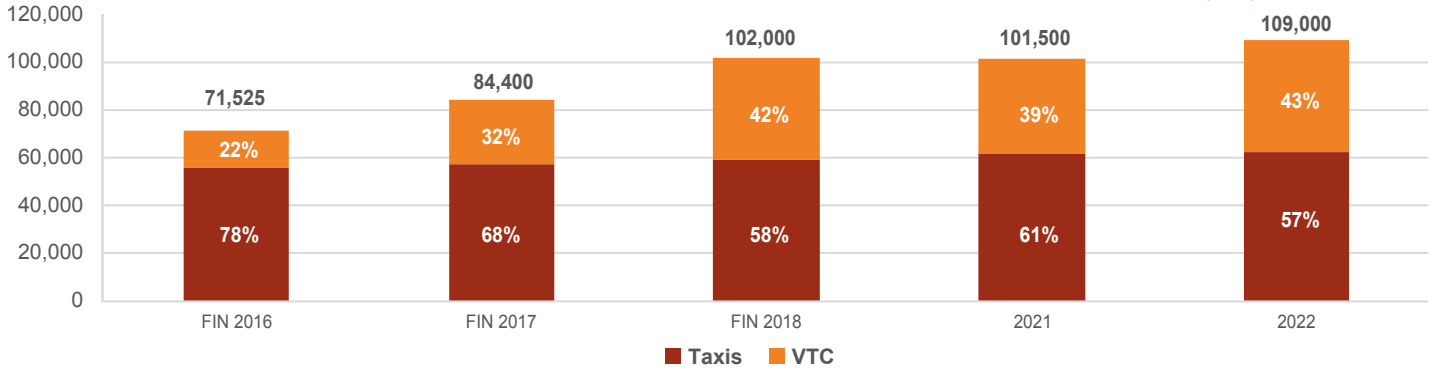
THE B2C AND B2B OFFERING OF FRENCH CAR MANUFACTURERS:

The Renault group offers nearly 10,000 electric vehicles for car-sharing in most European capitals. Under the Zity brand, it operated a free-floating car-sharing service in Madrid (since 2017), Paris and the Hauts de Seine department (from 2020 to 2023), as well as in Lyon and Milan in 2023. The principle is the same with Green Mobility in Copenhagen and Totem Mobi in Marseille and Montpellier. With the Renault Mobility app, a car-sharing service has been developed in several cities, including Nice, where it has been awarded the 'carsharing' label. The group has also formed partnerships with commercial brands to offer the service to their customers.

Stellantis' Free2Move brand and its app of the same name offer self-service car-sharing services in Paris, Madrid, Lisbon, Washington DC, Portland, Denver and Columbus. Free2Move strengthened its car-sharing services in Europe with the acquisition of Share Now in 2022. In 2023, Free2Move is expanding into new European markets (Slovenia, Greece, Romania), thanks to partnerships with the main importers of Stellantis brands in these regions.

NEW USES FOR THE AUTOMOBILE

NUMBER OF TAXIS AND VTCS IN THE OFFER OF PUBLIC TRANSPORT FOR PRIVATE INDIVIDUALS (T3P)



Source: National Observatory of Private Public Passenger Transport, CGDD, March 2024

CHAUFFEUR-DRIVEN TRANSPORT VEHICLES (VTC)

The activity of private hire vehicles belongs to the category of specialised public passenger transport (SPPT), as defined by the transport code, which also includes taxis and motorised two- or three-wheeled vehicles, commonly known as motorbike taxis.

Since their arrival in France in the early 2010s, chauffeur services have helped to expand the mobility offering by providing a pre-booked passenger transport service. However, their rapid development has raised many questions about their legality and the competition they may pose to taxis, leading the public authorities to review the regulations in force.

Originally, the status of private hire vehicle was inherited from the status of 'car de grande remise' and the profession of 'Grand Remisier', drivers of luxury passenger cars. In 2009, this regime was transformed by the Novelli law, which deregulated the activity and created the status of passenger vehicle with driver. The Thévenoud (2014) and Grandguillaume (2018) laws made it possible to establish new regulations applicable to private hire vehicles, now called 'transport vehicles with drivers', and to define the scope of the profession.

Thus, today, the activity of private hire vehicles is subject to specific installation and operating conditions that distinguish it from the activity of taxis.
The vehicle used must meet certain 'high-end' requirements. It must have between four and nine seats (including the driver), have been in use for less than six years (excluding vintage vehicles) and fulfil certain technical characteristics (size, power).

- The driver must obtain a professional chauffeur-driven car licence and register in the national register of chauffeur-driven car operators.
- It is compulsory for the customer to reserve the vehicle. The vehicle may therefore neither park nor drive on public roads in search of customers. Electronic hailing is prohibited and remains reserved for taxis.
- The fare is completely unrestricted, unlike taxi fares, which are regulated and set by decree.

The National Observatory for Private Passenger Transport, created in 2017, draws up an annual report on the activity. In 2022, there were 47,000 drivers active on private hire vehicle platforms and 62,300 taxis in France. The number of private hire vehicles has increased sharply since 2016. They now represent 43% of the T3P (transport à la demande) offer, compared with 22% in 2016. In 2022, the number of taxis stagnated, while the number of private hire vehicles increased by a further 18%. The concentration of taxis in relation to the population is very high in rural areas and in the Île-de-France region. Private hire vehicles, on the other hand, work almost exclusively in metropolitan areas.

Manufacturers are joining forces with various operators to provide vehicles and services to private hire drivers. Free2move is working with Uber to convert 50% of the vehicles available on the platform to electric vehicles by 2025. Mobilize Driver Solutions offers a range of 100% electric vehicles and services in Paris and Madrid, entirely dedicated to taxis and private hire vehicles.

RENTALS BETWEEN PRIVATE INDIVIDUALS

Car sharing outside the private sphere has also developed and been facilitated by the development of platforms for connecting individuals. Car rental between individuals allows vehicle owners to rent out their car when they are not using it, thus offsetting certain fixed costs related to ownership or maintenance. This differs from car sharing between individuals, which involves several people sharing one or more cars, having previously defined the conditions of use.

According to the CAR FLEET survey, the rental rate is holding steady in 2023 (6% of the sample used it, compared to 8% in 2019). Holidays remain the main reason for renting, followed by weekends. Regarding peer-to-peer car hire, more than nine out of ten people say they are still very reluctant to make a car available or rent one via a platform. However, this is growing: 15% of households that rented a car used peer-to-peer car hire in 2023, compared with 7% in 2019.

43% Share of VTCs in public transport for private individuals (T3P) in 2022

THE CONNECTED AND AUTONOMOUS VEHICLE

The connected vehicle is based on communication and the sharing of information between vehicles or between vehicles and the road infrastructure, thanks to wireless connectivity systems. Various services are offered: entertainment (Bluetooth or 5G), geolocation data (GNSS systems), real-time traffic information, calculation of energy consumption. The development of advanced driver assistance systems (ADAS) also makes driving easier (parking assistance) or safer (intelligent speed adaptation, warning systems) thanks to sensors. Some of these safety devices are now required by European regulations.

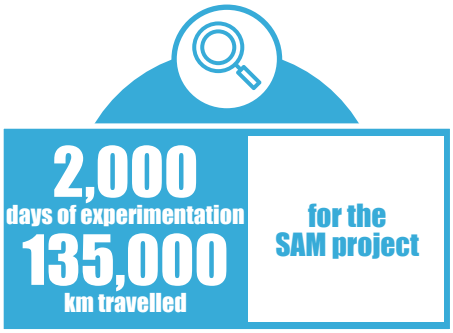
The level of vehicle automation has been defined by the Society of Automotive Engineers (SAE), using a nomenclature that distinguishes between driver assistance systems (levels 1 and 2) and systems where the driver can delegate the driving task (levels 3 to 5). The Vienna Convention adopted in 1968 limited traffic to levels 1 and 2 by requiring the presence of the driver, who had to be in control and remain in charge of his or her vehicle. In 2016, an initial development authorised automated driving or driving delegation systems (i.e. level 3) provided that the driver remained in control of his or her vehicle and that these systems complied with UN regulations. Then, in July 2022, an amendment to the Vienna Convention allowed the circulation of driverless vehicles, but under certain conditions.

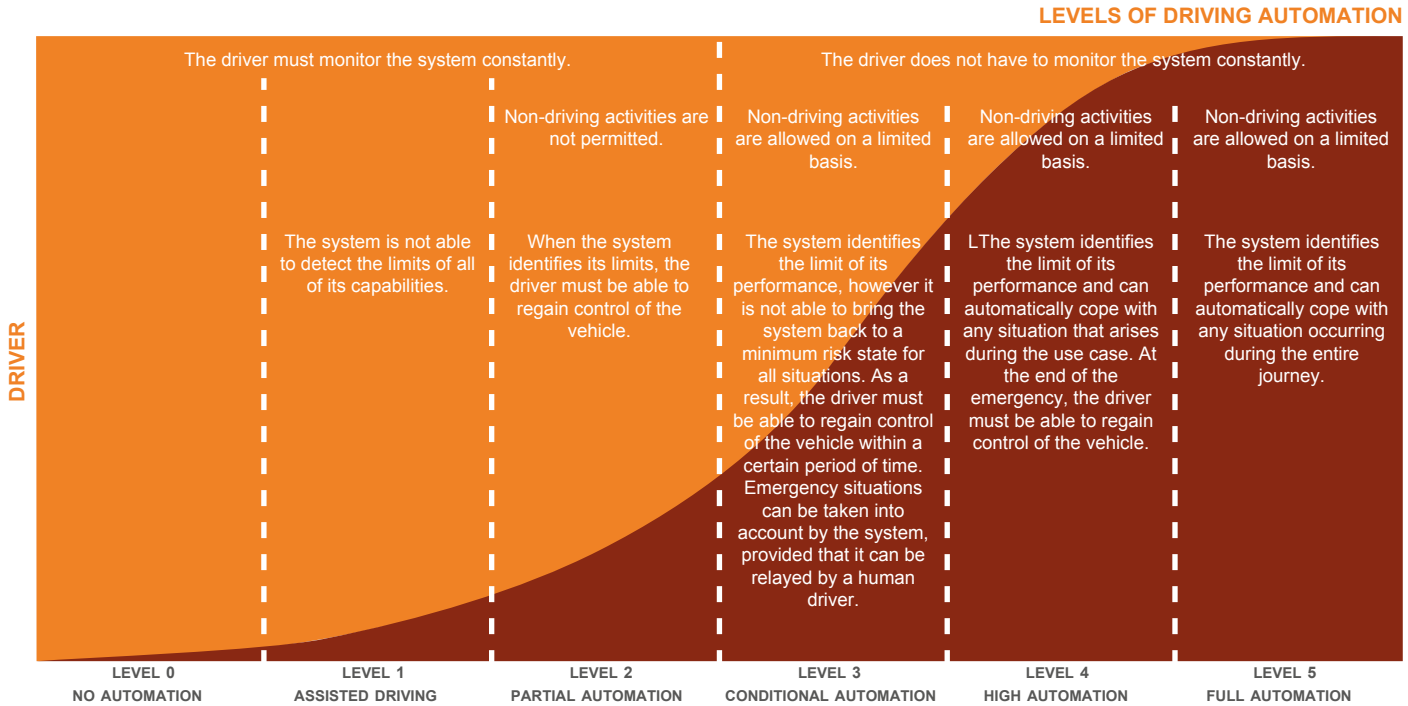
On the technical level, the first regulation on level 3 automation is UNECE Regulation 79, which concerns the approval of vehicles with automated lane keeping systems (known as 'ALKS'), adopted in June 2020. This low-speed driving delegation system can be activated by the driver only on eligible separate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

From a legal perspective, the law of 17 August 2015 on the energy transition for green growth legally classifies 'autonomous vehicles' as vehicles with partial or total driver delegation, whether they are private cars, goods transport vehicles or passenger transport vehicles. The mobility framework law published in December 2019 made it possible to adopt various structural provisions for the development of automated mobility, particularly on the issue of criminal liability, which came into force on 1 September 2022.

Vehicle automation and connectivity will make it possible to offer new services related to driving and road safety (warning systems, feedback), geared towards the vehicle itself (maintenance and repair services), relating to road infrastructure (traffic management or management of the infrastructure itself) or to the driver (insurance services or infotainment services). New use cases will also be made possible in passenger transport (automatic valet parking, urban shuttles on closed or open sites), as well as in freight transport and logistics (closed sites, last-mile logistics, long-distance transport), and car manufacturers are participating in several national or European projects to test vehicle connectivity and automation.

However, the proliferation of vehicle data makes it necessary to distinguish between the use of this data to serve objectives of general interest (improving traffic flow, improving road safety and the environmental footprint, managing infrastructure) and its exploitation for the development of commercial services, hence the need to regulate this use through the concept of the 'Extended Vehicle'.





Automation levels were defined by SAE J3016.

Public support for the development of autonomous and connected vehicles

The national strategy for the development of autonomous vehicles, launched in 2018, is based on three principles: safety, progressiveness and acceptability. The new 2022-2025 strategy aims to focus on the mobility services made possible by automation and connectivity and to accelerate France's regulatory, technological and economic commitment, to make it a leader in the deployment of use cases. It is targeting between 100 and 500 automated passenger transport services, without operators on board, by 2030.

In 2019, the LOM law made various provisions for the development of automated mobility, particularly on the issue of criminal liability in the case of an autonomous vehicle on the road and its conditions of use. A decree that came into force on 1 September 2022 establishes that, from now on, the driver of a vehicle using an automated driving system will not be held criminally liable for an offence if, during the incident, the system is exercising dynamic control of the vehicle.

THE CONNECTED AND AUTONOMOUS VEHICLE

It also establishes the respective responsibilities of the driver and the manufacturer or designer of these systems and the obligations to inform drivers. These provisions cover automation levels up to so-called 'fully automated' systems, if they are under the supervision of a person responsible for remote intervention and that they are deployed on predefined lanes or zones.

The State also supports investment in autonomous vehicles through the Investing for the Future Programmes (PIA). PIA3 has funded two national experimental programmes (SAM and ENA). The PIA4, with a budget of €200 million, enabled a new call for projects on 'automated road mobility, connected service infrastructures and low carbon' which resulted in 8 winners (including the 5 G Open Road project) proposing automated passenger transport services in various forms (regular services, transport on demand, or connections to multimodal hubs).

Experiments and tests of connected and autonomous vehicles

In France, the regulatory framework for experiments was established by the ordinance of 3 August 2016, which makes the experimental circulation of vehicles with partial or total delegation of driving on a road open to public traffic subject to prior authorisation from the minister responsible for transport. It was supplemented by the so-called Pacte law, which authorises experiments with vehicles at the highest levels of automation with an adapted liability regime, and by the LOM law on the framework for the circulation of autonomous vehicles. Since the end of 2014, more than 140 experimental authorisations have been issued.

The France Véhicules Autonomes programme, which supports the national strategy, has made it possible, via the EVRA (Expérimentation du Véhicule Routier Autonome) call for projects, to finance two experimental projects. The SAM (Sécurité et Acceptabilité de la conduite et la Mobilité autonome) project, led by a consortium of mobility stakeholders (manufacturers, transport operators, local authorities, infrastructure managers, research laboratories) and coordinated by the PFA, has enabled work to be carried out over a period of four years on use cases (private vehicles, car park valet parking, public transport, new collective or shared mobility services, last mile delivery) with 40,000 users in 13 regions. It was completed at the end of 2023. The ENA (Experiments in Autonomous Shuttles) project, led by Gustave Eiffel University, brings together a consortium of seven companies, two academic institutions and two local authorities. It has made it possible to test an automated shuttle service in Sophia Antipolis (April 2022) for several months, followed by a service in a sparsely populated rural area in Cœur de Brenne (July 2022).

The 5G OpenRoad project is another project funded by the PIA. It aims to test the contribution of 5G on open roads in Europe. Created in April 2022, it brings together 16 private and public partners, is coordinated by the PFA and Nokia and has a budget of €90 million. It allows different use cases to be tested on open roads, thanks to level 2 vehicles (Renault and Stellantis), robot taxis and level 4 autonomous shuttles and droids. The experimental areas are the Saclay plateau and Vélizy.

At the European level, several projects are co-financed by the European Commission. The SCOOP project (2014-2019), deployed with 3,000 vehicles on 2,000 km of roads and 5 sites, was the first project to deploy cooperative intelligent transport systems, based on the exchange of information between connected vehicles and between vehicles and infrastructure. Other projects such as InterCor (dedicated to freight), InDid and C-Roads were launched subsequently, with a view to extending SCOOP services to other French and European regions. The C-Roads project is expanding the use cases by integrating urban situations and developing new road information services, such as the COOPITS application, deployed in the Bordeaux metropolitan area in January 2021, which provides real-time information (traffic, car parks, reserved lanes). The 5GMED project brings together 21 players to test and deploy 5G on road and rail between France and Spain.

There are also various dedicated test centres for carrying out experiments with autonomous and connected vehicles. TEQMO was inaugurated in June 2019 by UTAC in Montlhéry and funded by the PIA and the Île-de-France Region. It consists of 12 km of test tracks with a motorway circuit, an urban area and a manoeuvring area, and includes 5G connectivity. Transpolis, in which Renault Trucks is involved, is a laboratory city located in the Ain department dedicated to innovation and safety and which is home to the ENA project.

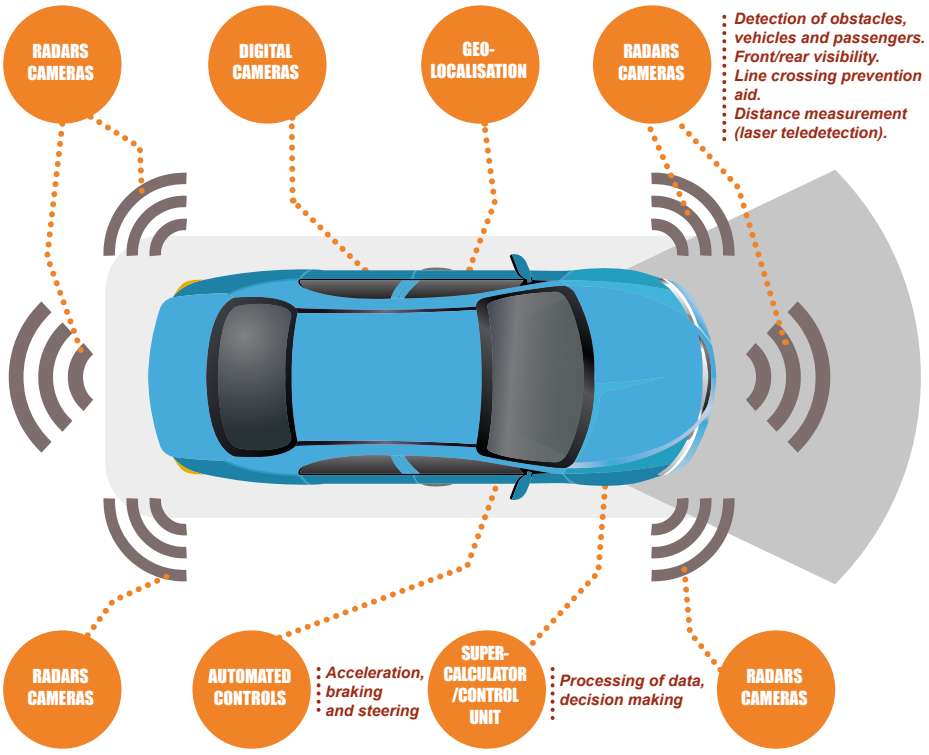
The issue of access to vehicle data

The increased use of automated vehicles will develop the data produced for various uses with a significant impact on the development of mobility services. The rules concerning the management of this data, when it is personal, are a major issue for the respect of people's privacy. In this respect, the European General Data Protection Regulation (GDPR), which came into force in May 2018, reinforces the protection of users' personal data. In France, the LOM 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 address cybersecurity issues, with security at the level of the vehicle, but also of the infrastructure and centralised control. In addition, European regulation on cybersecurity and cooperative intelligent transport systems are making significant contributions, complemented by 'soft' law rules with the CNIL compliance pack on connected vehicles currently being developed and technical standardisation (ISO).

The 'Extended Vehicle' (ExVe) is a concept that car manufacturers, together with major equipment manufacturers and independent distributors, have been seeking to standardise at the international level (ISO) since 2014. It reflects the concern to take into consideration the extension of the scope of action of the vehicle, now highly connected, with the impacts that such an extension implies in terms of system integrity and security. The extended vehicle standards establish a system enabling coherent, responsible and interoperable management of vehicle data. Connected technologies and autonomous driving are paving the way for new mobility scenarios and the establishment of a broader economic and legal system in which car manufacturers play a decisive role (see Deloitte/Fréget report of January 2020). The development of artificial intelligence has a key role to play in contributing to innovation and the digital and ecological transformation of the automotive sector.

16 major mobility players cooperate to create 5G OPEN ROAD

► EXAMPLES OF ONBOARD INTELLIGENCE SYSTEMS FOR AUTOMATED DRIVING



PASSENGER TRANSPORT PRICE INDEXES

In 2023, in a context still marked by high inflation (+4.9%), the price index for the various modes of passenger transport continues to increase, but to a lesser extent than in 2022. The strong tensions on energy prices linked to the outbreak of the war in Ukraine have eased and these are slowing down sharply in 2023. The price index for personal vehicles (purchases and use) increases by 4.5%, after 10.3% in 2022. This slowdown is largely linked to that of the prices of usage expenses, the index of which increases by only 4%, compared with 11.6% in 2022. The price index associated with vehicle purchases also slowed, from +5% to +3.8% in 2023.

In road passenger transport, prices rose by 5.6% in 2023, after 8.4% in 2022. Prices for 'coach and bus transport' increased by 5%, while prices for 'taxis, chauffeur-driven cars' accelerated to +6.5%.

While prices had fallen in 2020 for air transport and skyrocketed in 2022 (+22.9%), they continued to rise sharply in 2023 (+10.4%), but this growth was halved compared to 2022. Finally, the price of rail transport also grew strongly (+6.8%).

Over the last twenty years, the price indexes of the different modes of passenger transport have evolved in very different ways. Since 2000, real price indexes, i.e. adjusted by the general consumer price index, have increased by 25.5% in private passenger transport (taxis, chauffeur-driven cars) and by 16.8% for personal vehicles. Air and rail transport increased by 20% and 14.8% respectively. Road passenger transport (buses, coaches) fell by 4.6% with the increase in competition. In rail passenger transport, real prices increased by 19% between 2000 and 2015, but fell back over the following 5 years, with a collapse in prices in 2020 linked to tariff adjustments after the lockdown. Since 2021, a rise in prices has been recorded again.

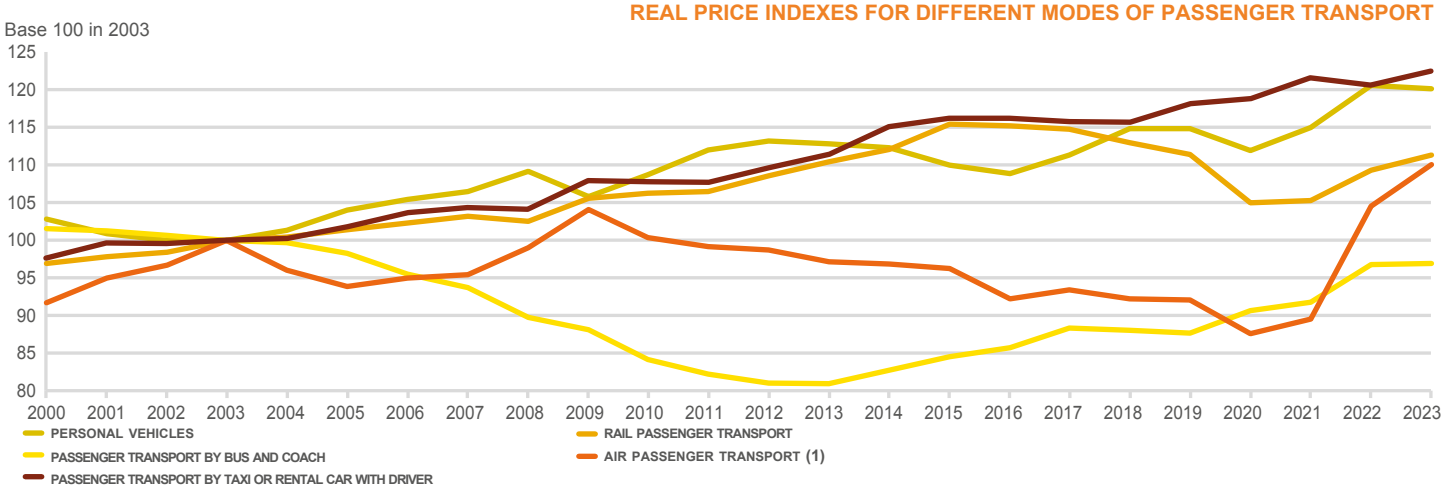
+4.5% Change in 2023 in price index for personal vehicles

► ANNUAL VARIATIONS IN PRICE INDEXES FOR DIFFERENT MODES OF PASSENGER TRANSPORT (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%
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%
2023	4.5%	6.8%	5.6%	5.0%	6.5%	10.4%

(1) A change in methodology occurred in the calculation of the price index for air transport services in January 2012. The variation between 2011 and 2012 cannot be considered significant.
Source: INSEE

REAL PRICE INDEXES FOR DIFFERENT MODES OF PASSENGER TRANSPORT



Source: INSEE

The price indexes for the various modes of passenger transport track price changes including all taxes. Thus, for air travel, airport taxes are included; similarly for the other modes, infrastructure charges are included only to the extent that they can be incorporated into the selling price. In addition, only the portion directly paid by the household is tracked. For example, if a region or local authority decides, as part of a regional planning policy or social measures, to subsidise part of the transport costs, a reduction will be recorded in household expenditure. Fuel surcharges are incorporated in the monitoring of the passenger air transport index.

The indexes for rail and road passenger transport mainly concern interurban connections. The index for private vehicles was established considering both the purchase and the use of private vehicles. To track the real price changes of these main modes of transport, these different indexes are adjusted by the general consumer price index in the graph above.

After remaining close to their 1995 level, the real price indexes for the various modes of passenger transport have been experiencing stronger and more contrasting trends since 2003: between 2003 and 2019, the real index for personal vehicles (purchases and use) 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 grew by 15% between 2000 and 2023 but declined between 2015 and 2020. The index for road passenger transport (coaches and buses) fell sharply until 2013, but has been increasing steadily since then, with a decline of 4.6% over the period 2000-2023. Private passenger transport (taxis, chauffeur-driven cars) has grown steadily (+25.5%) over the same period. Finally, the real air transport price index decreased for a long period starting in 2009, but has risen sharply since 2021, reaching a 20% increase over the period 2000-2023.

FREIGHT TRANSPORT PRICE INDEXES

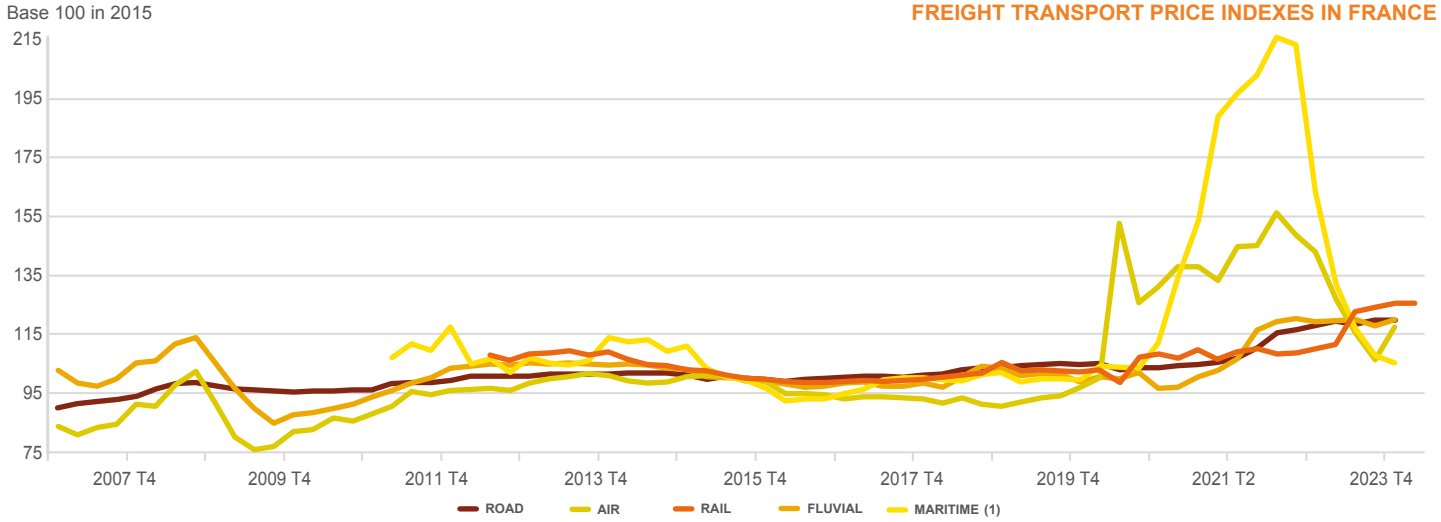
In 2023, against a backdrop of contracting world trade linked to persistently high energy prices and inflation, freight transport prices developed in contrasting ways. In maritime freight transport, prices fell by 42% in 2023. The slowdown in global demand and a situation of overcapacity in containerised sea freight explain a reversal of the balance of power between supply and demand, which led to the collapse of prices after the exceptional growth linked to the post-COVID recovery. In air freight, the fall in prices amounts to 21.4%. In road transport, on the other hand, prices continue to rise, but at a slower pace than in 2022 (+3.6%, compared with +9.3% in 2022) due to the slowdown in fuel prices. In river transport, prices are stable (+0.5%). Finally, in rail transport, prices, which had stagnated in 2022, rose by 13.5% in 2023, due to an increase in electricity prices.

Since 2006, the road freight transport price index has risen steadily, by an annual average of 1.7%, but is accelerating to 4.7% per year between 2020 and 2023. Over the same period, the price indexes for river and air transport have experienced more erratic changes and significant increases from 2019 onwards. Over the entire period from 2006 to 2023, prices increased by an annual average of 1.3% for river transport and 1.9% for air transport.

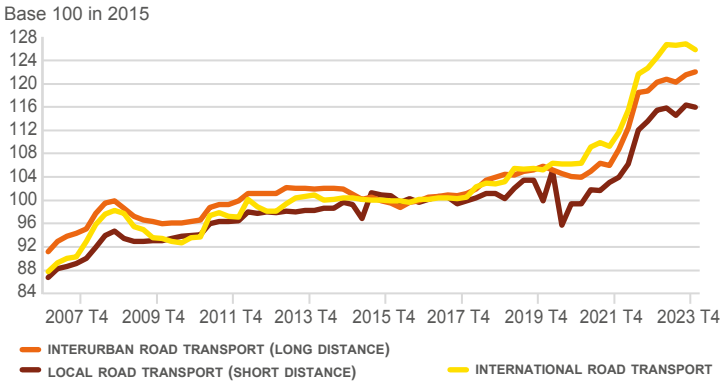
In rail transport, the price index has only been published since 2014, with a history going back to the first quarter of 2012. Between 2012 and 2019, prices were falling but, since 2020, they have risen sharply and have exploded in 2023, both on national and international railways. Since the opening up to competition in 2006, new operators have developed and now account for almost half of the tonne-kilometres transported, a level comparable to that of Germany.

+22% Increase in the price index for rail freight transport since the end of 2019

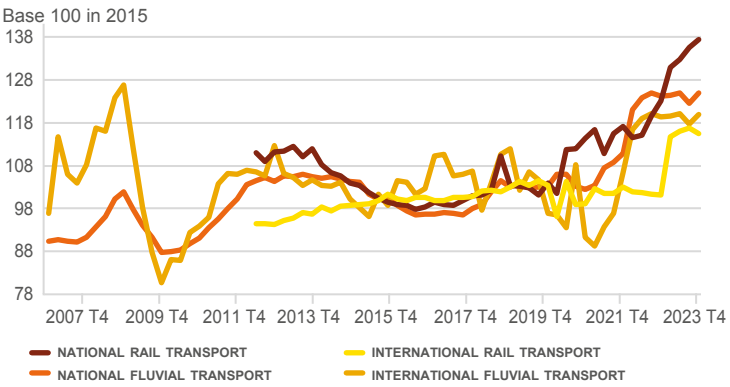
FREIGHT TRANSPORT PRICE INDEXES IN FRANCE



FREIGHT TRANSPORT PRICE INDEXES IN FRANCE: ROAD



FREIGHT TRANSPORT PRICE INDEXES IN FRANCE: RAIL AND RIVER



Source: MTE/SDES

The freight transport price indexes are calculated by the statistical service SDES of the Ministry of Transport. For road, river and rail transport, the indexes are developed using the methodology of representative services, defined by the loading and unloading locations, the type of goods and the characteristics of the contract between the shipper and the carrier. Price surveys are carried out on a quarterly basis. In road and river transport, only activities carried out on behalf of third parties by companies based in France, for which freight is the main activity, are monitored.

For rail transport, the price index, monitored since the first quarter of 2012, is based on 111 representative transport services, entrusted by a sample of shippers to rail transport operators. For air freight, the index consists of freight transport services 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 compiled using the so-called unit value methodology, which includes fuel and security surcharges paid to the airline providing the service. This price index is linked to the high volatility of fuel prices.

For maritime transport, the price index is composed of transport services for hire or reward carried out by companies registered in France whose activity is maritime freight (bulk and ferry). It is based on international price indexes, unit prices and tariffs. This price index is highly volatile, in line with the evolution of bulk prices.

For road freight, infra-annual variations are less significant than for river or air freight, even if fuel represents more than 20% of the total costs of road haulage, as shown by the CNR survey (read page 61).

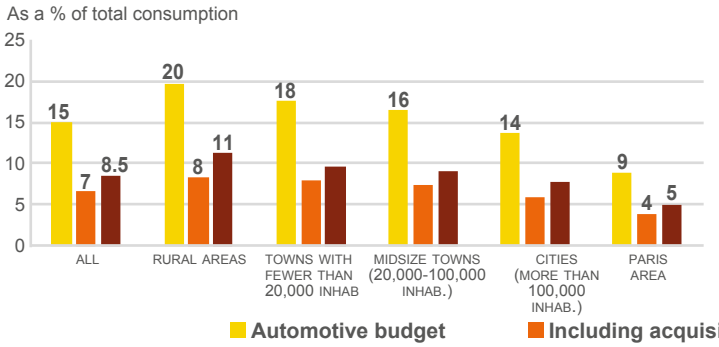
THE COST OF HOUSEHOLD CAR MOBILITY

According to the latest 'Family Budget' survey of 2017, metropolitan households devote an average of 15% of their budget to motoring. This budget varies from 20% in rural households to only 9% in the Paris conurbation and represents more than half (57%) of the expenses related to vehicle use (fuel, repairs, maintenance, tolls, insurance). These running costs amount to 8% of the total budget but reach 11% in rural households and 9% on average in households belonging to the first 3 income quintiles (compared to 7.4% for the 5th quintile). The item with the highest weighting within this group is fuel, which represents 4% of the total and reaches 6% in rural areas, compared with only 2% in the Paris conurbation. The least well-off households (Q1-Q3) also devote a larger share of their budget to this item (4.3%) than the richest households in the 5th quintile (3.3%). Finally, the breakdown by socio-professional category also shows significant contrasts in terms of car expenditure. The category of managers and employees, who frequently work in the service sector in urban areas, spend a lower proportion of their budget on cars (13% and 15% respectively). Conversely, the category of farmers, manual workers and craftspeople and tradespeople, who are less present in urban areas and more obliged to use their vehicles for work, spend 18% of their budget on motoring.

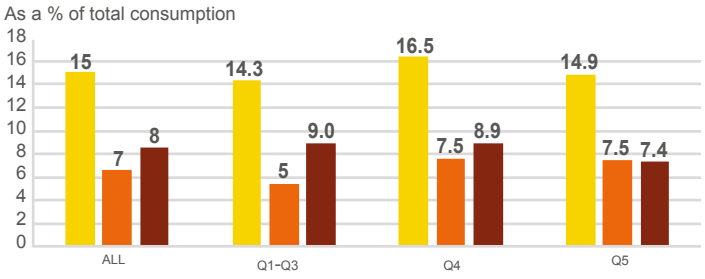
6% Weight of fuel expenditure in the budget of rural households according to the 'Family Budget 2017' survey

►AUTOMOTIVE BUDGET IN 2017

BY RESIDENCE AREA

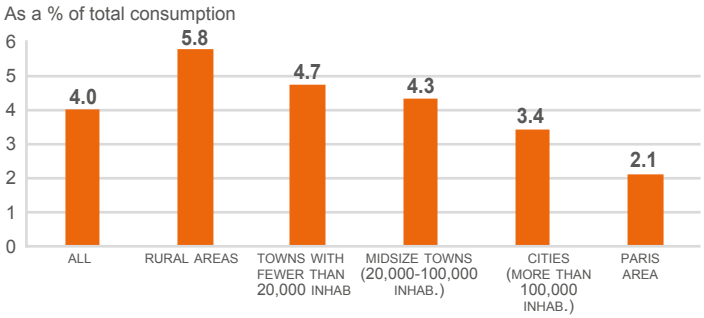


BY INCOME QUINTILES



►SHARE OF FUEL IN HOUSEHOLD CONSUMPTION IN 2017

BY RESIDENCE AREA



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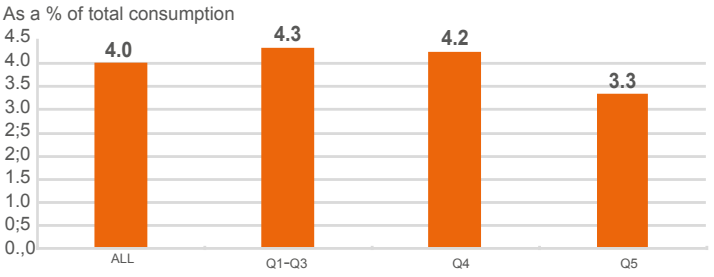


Source: INSEE, Family budget survey 2017

The 'Family Budget' survey conducted on average every five years by INSEE provides an estimate of the average consumption of various goods and services and allows a comparison of the consumption structures of the various categories of households according to their different characteristics: socio-professional category, age, income, category of municipality of residence, etc.

In terms of car items, there are two important differences compared to the national accounts (page 63). In the treatment of transport insurance expenditure, the full amount is considered in the surveys, whereas only the service (expenditure minus reimbursements) is accounted for at the macroeconomic level.

As for expenditure on second-hand vehicles, the full amount is accounted for in the surveys, whereas at the macroeconomic level, this corresponds mainly to the margins of the professionals involved in a transaction and does not consider exchanges between private individuals.

The budget survey used in this edition is limited to mainland France. The breakdown of the various automotive items is expressed as a percentage of total consumption excluding taxes, loans repayments and major works. Expenditure is 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 incomes.

In 2017, the car budget of metropolitan households represented 15% of their total consumption. The acquisition item accounts for less than half of the total (43%), varying from 5% of the budget for the 60% of households with the lowest incomes (Q1-Q3) to almost 8% for the 5th quintile. Conversely, the item 'user charges' weighs more heavily for households belonging to the first quintiles (9%) compared with 7.4% for the 5th quintile. This difference is particularly linked to the weight of the fuel item, for which the most modest households devote 1 point more of their budget than the most affluent households. The same phenomenon can be observed for transport-related insurance, which accounts for 2.6% of the budget of the most modest households. As these two items are the most heavily taxed, it follows that households in Q1-Q3 pay proportionally more tax on their car consumption than households in the last quintile.

When broken down by category of municipality of residence, the fuel item appears to be all the higher the smaller the size of the municipality. Households in the Paris conurbation, for example, spend almost 2% of their consumption on this item, compared with more than 6% for households in rural municipalities, who benefit less from public transport and travel more frequently and over greater distances.

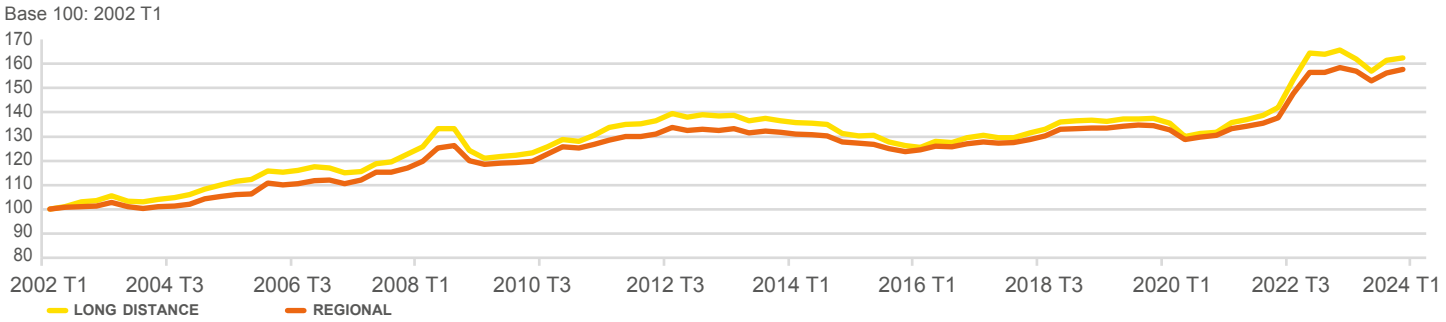
With the development of electric vehicles at a higher unit price, low-income households will find it more difficult to afford them, given the small proportion of their budget they currently devote to vehicle purchases. In addition, the use of the second-hand market for the purchase of electric cars is still limited by the low volumes.

COST PRICE OF ROAD FREIGHT TRANSPORT

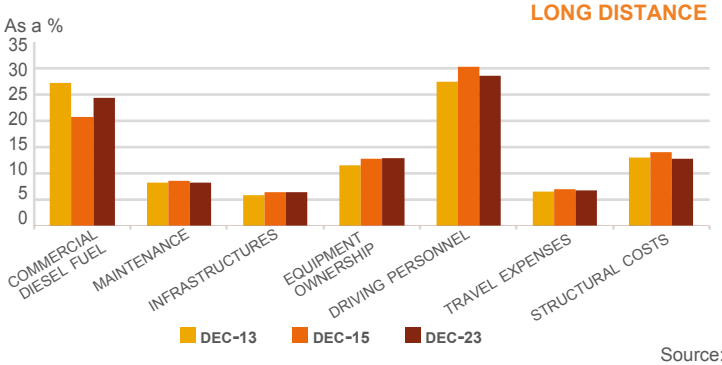
-0.7 % **Decrease in the full cost price of long-distance road haulage in 2023**

The synthetic indexes calculated by the Comité National Routier (CNR) indicate that the cost price of road haulage, after having risen very sharply in 2022 (+15% on average), remained stable in 2023, thanks to the fall in diesel prices. However, excluding fuel, the increase in costs reached an annual average of +6.3%, driven by the increase in the driver item: +8% for increases in salaries and charges (which represent between 30 and 40% of the total cost) and +6.4% for travel allowances. The former have increased with the successive revaluations of the contractual minimums in January (minimum wage: +1.8%), in May and in December (contractual hourly rates for travelling workers: +5.4%). The contractual travel expenses allowances, for their part, have been revalued by +5% as of 1 December 2023 (social agreement of 11 October 2023). The other main components of the cost price (structural costs and equipment) also saw their prices increase in 2023. The price of equipment, which represents between 13% and 20% of costs depending on the type of operation (regional or long-distance), increased by around 3.5%. Structural costs, which represent around 13% of the total, increased by around 7%.

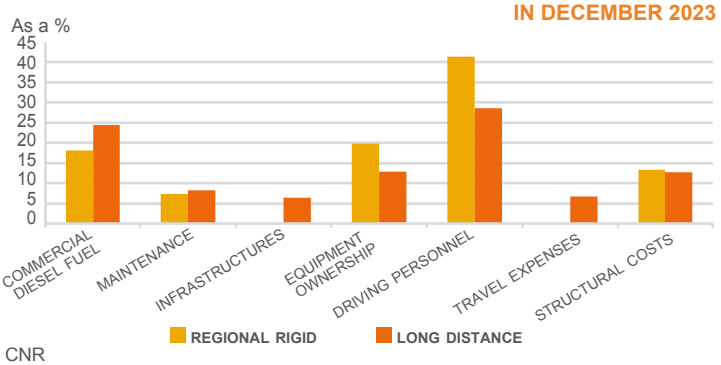
COST OF ROAD FREIGHT TRANSPORT



COST STRUCTURE OF ROAD FREIGHT TRANSPORT: LONG DISTANCE



COST STRUCTURE OF ROAD FREIGHT TRANSPORT IN DECEMBER 2023



Source: CNR

Every year, the Comité National Routier (CNR) publishes several indexes reflecting the evolution of the cost of road haulage for hire or reward. The two indexes used here are those relating to long-distance and regional transport.

Long-distance transport corresponds to national or international transport carried out using articulated combinations of up to 44 tonnes, where the operating constraints make it impossible or uncertain for the driver to return home every day. Regional transport, carried out by means of vehicles with a total weight of between 3.5 and 19 tonnes, corresponds to transport within a region and neighbouring regions, the operating conditions of which allow the driver to return home every day. The cost structure resulting from the CNR's annual survey depends both on the evolution of each of the components and on the associated operating conditions (mileage travelled, number of hours worked). Thus, the weight of a position in the structure may vary differently from what the evolution of its unit cost might suggest. Here, we are essentially interested in the evolution of the cost structure, as it better reflects the reality experienced by hauliers.

The CNR has been taking the CICE into account in the calculation of its indexes since 2013, the year it came into force, to make them comparable with the post-2019 period. From 1 January 2019, the CICE is being transformed into a permanent reduction in employers' social security contributions.

In long-distance road haulage, the biggest item of expenditure is driving personnel, whose share has remained stable since 2013, at around 29% (28.6% in 2023). The second largest item of expenditure, commercial diesel, fluctuated between 2013 and 2022, falling from 27% to 20% a few years later, before rising sharply again in 2021 and 2022. In 2023, with the fall in fuel prices, it fell by 2 points to 24.4% of the total.

The share of equipment ownership (road tractors and semi-trailers) has remained stable at just over 12% since 2016, following two years of increases, due to the rise in the price of new vehicles linked to the implementation of the EURO VI environmental standard on 1 January 2014 and the new mandatory safety equipment. The impact of these increases is diluted in the calculation of the cost of ownership due to the gradual renewal of vehicles (approximately 1/6 of the fleet per year). However, the significant rise in interest rates increases the financial burden of these changes in equipment. The maintenance cost index, which includes tyres and vehicle maintenance and repair, has remained stable at around 8.3% since 2016. Finally, the 'infrastructure' item is stable in 2023, at 6.4% of the total cost.

In regional transport, the costs associated with driving personnel are higher than in long-distance transport and will increase by 1.4 points in 2023 to 41.4% of the total in 2023. Equipment ownership comes in second at 20%, ahead of spending on commercial diesel, which will fall by 2 points in 2023 to 18.2%. Finally, maintenance and repair costs will remain stable at 7.3% of the total in 2023.

In the coming years, the emergence of new engines, which are more expensive to purchase, will require appropriate financial support to encourage hauliers to decarbonise their fleets. In addition, the cost of energy must be kept at a level that does not stray too far from overall market costs.

AUTOMOTIVE PRICE INDEXES

In 2023, the trend that began in 2021 of a general increase in prices continues, but at a slower pace than in 2022, due to a slowdown in energy prices. The increase in the general price level went from +5.2% in 2022 to +4.9% in 2023.

In this context, the prices of new cars continued to increase, but at a slightly slower pace than in 2022 (+4%, compared with +7.5% the previous year). On the other hand, the prices of spare parts and accessories and vehicle maintenance and repair accelerated, rising from +5.7% in 2022 to +7.9% in 2023. The parts and accessories component experienced a resurgence of inflation (+6.5%, after 3.9%), but at a rate that remains below the increase in the cost of the service (cost of labour and supplies used), which rose from +5.9% in 2022 to +8% in 2023. Since 2005, this corresponds to an increase in the cost of repair services of 87% (+37% in real prices), while the price of parts and accessories has only increased by 16% and has even fallen in real prices.

Fuel 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, rose sharply in 2022 (+23.3%) due to the war in Ukraine and the global recovery. They remain stable in 2023.

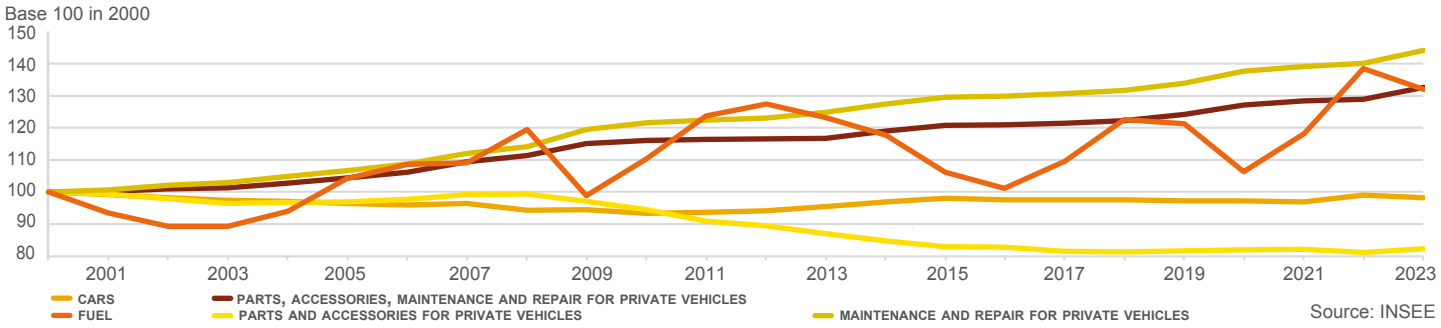
Stable fuel prices in 2023

► 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%
2021	5.2%	7.5%	5.7%	3.9%	5.9%	23.3%
2023	4.9%	4.0%	7.9%	6.5%	8.0%	-0.04%

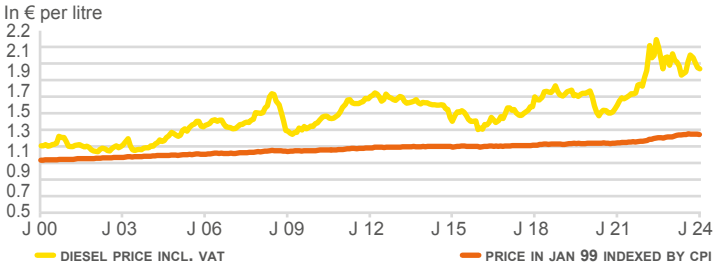
Sources: INSEE, CCFA calculations

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

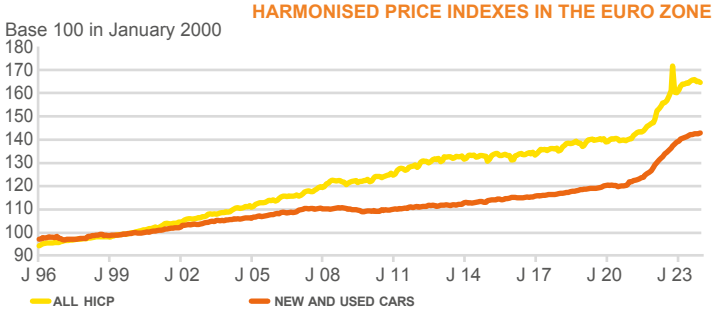


Source: INSEE

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



HARMONISED PRICE INDEXES IN THE EURO ZONE



Sources: MTE/SDES, INSEE, CCFA calculations

Source: Eurostat

The index calculated by INSEE for new car prices compares the prices of a panel of cars with similar technical characteristics, so as not to consider price increases resulting from improvements in quality or equipment, or changes in the sales structure (energy mix, bodywork mix). It considers the discounts offered periodically (excluding private agreements), as well as the bonus/malus system. The INSEE index increased by only 9.4% between 2019 and 2022, while the average price of vehicles increased much more sharply (+21.9%) with the development of off-road and electric vehicles.

In the above graph, the prices of the main automotive items are expressed in real terms, i.e. adjusted for the general consumer price index.

Over the period 1992-2010, the real price of new cars has fallen steadily, under the continuous effect of competition and the one-off effect of market support measures (bonus/malus, scrappage scheme). Nevertheless, new regulatory requirements in terms of pollution control and safety, as well as the tightening of the ecological bonus/malus scales, have contributed to the growth in the prices of new cars since 2011. In 2023, all engines are experiencing price increases, but this increase is less sharp for electric cars (+3% according to AAA Data, compared with an average of +6.6%). The growing volume of electric cars in registrations (17% in 2023) weighs both on the average price of electric engines and on the overall price.

Expressed as a real index, i.e. deflated by the general price index, the price of new cars nevertheless falls slightly (-2%) between 2000 and 2023. Similarly, the real index for spare parts and accessories stands at 82 in 2023 (base 100 in 2000). Conversely, the real price index for maintenance and repair services is up 44% compared to 2000, due to the increase in labour costs (labour costs, skills development, shortage of skilled labour). Finally, fuel prices have risen much faster than inflation over a long period of time, particularly since 2017. Even if they have increased less quickly than inflation in 2023, the real index of fuel prices stands at 132 (base 100 in 2000).

In the euro zone, Eurostat calculates a harmonised consumer price index that allows international comparisons, thanks to a similar methodology in the different countries. Since 2000, the general level of prices in the euro zone has risen by 65%, while that of new and second-hand car purchases has risen by only 43%, indicating pressure on prices linked, as in France, to the intensity of competition and the constraint on household purchasing power.

HOUSEHOLD CAR CONSUMPTION

2023 was marked by a slowdown in growth against a backdrop of high inflation. GDP increased by 0.9%, after +2.6% in 2022. Inflation accelerated further compared to the previous year, rising to an annual average of 7.1%, compared to 4.9% in 2022. This acceleration in prices is largely linked to that of food prices (+12.2%, compared with +7.2% in 2022). Gross disposable household income (GDHI) increases by 8% in 2023, but high inflation limits the increase in purchasing power, which rises by only 0.8%. The volume of final consumer spending by households slowed down significantly, after having increased by 5.2% (2021) and 3.1% (2022) respectively, following the end of the health crisis. The household savings rate remained stable compared to 2022 at 16.9% of GDI.

All of the data produced by INSEE as part of the publication of the nation's accounts underwent a base change in 2023. Household consumption is therefore now expressed on a 2020 basis, which changes several results. Total expenditure on cars in 2023 amounted to €161.2 billion, up 5.1% compared to 2022, an amount that has been revised downwards like the whole time series. Vehicle purchases increased by 14.6% in value to €44.8 billion. Spending on new cars increased by 23.6%, due to the end of the semiconductor shortages that had held back registrations in 2021 and 2022. With the continued increase in the price of new cars (+4.2%), consumption in volume terms increased by 18.6%. Expenditure on second-hand cars increased by 9.9% in value, 5.5% in volume and 4.2% in price.

Expenditure on maintenance and repairs has been sharply revised downwards in the new baseline and amounts to €39.9 billion in 2023, an increase of 7.5% compared to 2022. Finally, purchases of 'fuels and lubricants' are down in 2023 (-1.7%), due to a decline in consumption in volume and a stabilisation of prices. The amount is €55.3 billion.

8.1% **Share of automobile-related expenditure in household consumption in 2023**

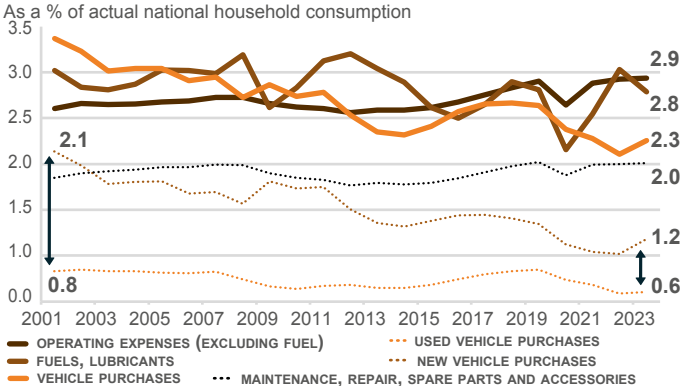
► HOUSEHOLD CONSUMPTION EXPENDITURE ON TRANSPORT (IN EURO BILLION AND SHARE OF ACTUAL NATIONAL HOUSEHOLD CONSUMPTION)

	2000		2010		2019		2021 (1)		2022 (1)		2023 (1)		Variation 2023/2022
VEHICLE PURCHASES	32.9	3.3%	38.7	2.7%	44.4	2.6%	39.5	2.3%	39.1	2.1%	44.8	2.3%	+14.6%
New and used cars (including tax on registration certificates)	28.8	2.9%	33.5	2.4%	36.9	2.2%	29.8	1.7%	29.8	1.6%	35.4	1.8%	+18.6%
including new cars	21.3	2.1%	24.5	1.7%	22.7	1.3%	18.0	1.0%	18.9	1.0%	23.4	1.2%	+23.6%
including used cars	7.6	0.8%	9.0	0.6%	14.2	0.8%	11.8	0.7%	10.9	0.6%	12.0	0.6%	+9.9%
Caravans, motorcycles, cycles	4.1	0.4%	5.3	0.4%	7.5	0.4%	9.7	0.6%	9.2	0.5%	9.4	0.5%	+1.6%
VEHICLE OPERATION EXPENSES	58.7	5.9%	77.1	5.4%	96.1	5.7%	94.1	5.4%	110.5	6.0%	113.5	5.7%	+2.8%
Maintenance, repair, spare parts and accessories	18.5	1.9%	26.1	1.8%	34.0	2.0%	34.6	2.0%	37.1	2.0%	39.9	2.0%	+7.5%
including manufacturing of automotive equipment	11.3	1.1%	17.2	1.2%	23.1	1.4%	22.8	1.3%	24.7	1.3%	27.0	1.4%	+9.2%
including motor vehicle maintenance services	2.4	0.2%	3.1	0.2%	4.0	0.2%	4.1	0.2%	4.5	0.2%	4.9	0.2%	+9.2%
Fuels and lubricants	32.4	3.3%	40.1	2.8%	47.3	2.8%	44.1	2.5%	56.3	3.0%	55.3	2.8%	-1.7%
Tolls, parking, rental, driving schools	7.7	0.8%	10.9	0.8%	14.8	0.9%	15.3	0.9%	17.1	0.9%	18.4	0.9%	+7.2%
MOTOR INSURANCE	1.0	0.1%	1.6	0.1%	2.2	0.1%	2.4	0.1%	3.8	0.2%	2.9	0.1%	-24.1%
TOTAL AUTOMOBILE AND MOTORCYCLE-RELATED CONSUMPTION	92.5	9.3%	117.5	8.3%	142.7	8.5%	136.0	7.8%	153.4	8.3%	161.2	8.1%	+5.1%
Public transport services	13.6	1.4%	21.7	1.5%	29.0	1.7%	17.4	1.0%	28.6	1.5%	34.1	1.7%	+19.2%
ACTUAL NATIONAL HOUSEHOLD CONSUMPTION	995	100%	1,415	100%	1,682	100%	1,734.48	100%	1,855.97	100%	1,984.66	100%	+6.9%
NUMBER OF HOUSEHOLDS (Metropolitan France)	24,256		27,227		29,336		29,848		30,115		30,378		+0.9%
Automobile consumption per household	3,813		4,314		4,863		4,556		5,093		5,307		+4.2%
Automobile consumption per motorised household	4,748		5,166		5,728		5,348		5,992		6,295		+5.0%

(1) These data are provisional and may be readjusted for three years.

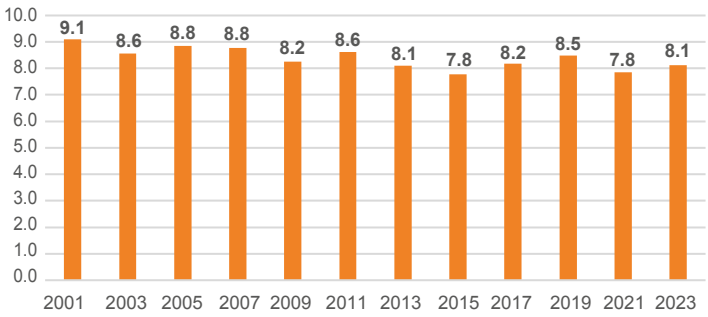
AUTOMOBILE BUDGET COEFFICIENTS

As a % of actual national household consumption



TOTAL AUTOMOBILE EXPENDITURES

As a % of actual national household consumption



Source: INSEE / La consommation des ménages, 2023 - base 2020

According to the national accounts data, which are based on different concepts from those used in the Family Budget Survey (see page 60), households spent €161.2 billion on their personal transport in 2023, and €34.1 billion on public transport services.

The share of car consumption in actual national consumption, known as the 'car budget coefficient', stood at around 9% between 1990 and 2009. Then, after the 2009 crisis, the coefficient fluctuated around 8.1%, a level also observed in 2023.

Until 2005, vehicle purchases (new and second-hand cars and other vehicles) were the main item of automotive expenditure, accounting for around 3.5% of actual household consumption. Then, from 2006 onwards, the weight of vehicle purchases began to decrease, and vehicle use expenditure (excluding fuel) became the main automotive item. Since 2019, the decline in the budgetary coefficient associated with vehicle purchases has been even more pronounced, due to the shortage problems that followed the health crisis and affected both new and second-hand car purchases. Vehicle purchases accounted for only 2.3% of household consumption in 2023. In addition, the gap between the weight of expenditure on new cars and that on second-hand cars has narrowed considerably, from 1.3 points in 2001 to 0.6 points in 2023.

Vehicle operating expenses (excluding fuel) have been rising steadily since 2014 and accounted for 2.9% of household expenditure in 2023. Finally, the weight of the 'fuel' item has fluctuated sharply over the last twenty years, in line with changes in energy prices. In 2020, it had fallen to 2.2% but rose again to 3% in 2022 and accounts for 2.8% of household consumption, i.e. an amount of €55.3 billion.

CAR FINANCING

In 2023, the cumulative production of new consumer credit declined, after slowing sharply at the end of 2022. The very sharp rise in interest rates from September 2022 (+2 points over 1 year) had a negative impact on consumer credit for individuals and even more so on housing credit. However, according to data from the Association des Sociétés Financières (ASF), the recovery of the automotive market, following the reduction of shortages, has led to an increase in the number of car financing applications for new purchases by individuals. This has increased by 11%, with an 18% increase in value due to the rise in vehicle prices.

In 2023, according to Kantar's Car Fleet survey, 62% of households bought their car on credit, compared with 69% the previous year. This significant drop reflects the tightening of borrowing conditions and high interest rates. Nevertheless, within credit purchases, rental formulas continue to grow (+15% in volume). Lease-purchase, which dominates the private leasing market, grew less quickly in 2023 (+5%) than hire purchase (+102%). Earmarked credit, meanwhile, continues to decline (-8%).

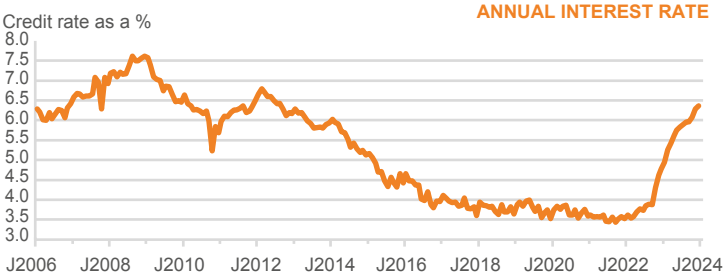
In 2023, leasing will represent 84% of credit financing (14% in 2010), ahead of car loans (16% in 2023, compared with 49% in 2010) and personal loans. Within the rental sector, the LOA (lease purchase) option is by far the most popular (69% of credit purchases) but is less popular than last year (72%), with the LSOA (hire purchase) option gaining ground, increasing from 9% to 16% of financing cases.

For second-hand vehicles purchased by households, cash purchase remains the main method of financing. In 2023, 63% of second-hand vehicles were purchased with a personal contribution according to Kantar's CAR FLEET survey, a slight increase compared to 2022. The number of credit financing files stagnated in 2023, in line with the slight drop in registrations. However, within their credit financing, leasing with a purchase option continues to develop (20% of cases, up 12%).

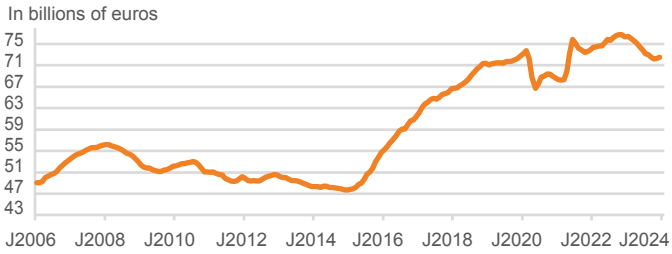
Credit financing for business equipment in new vehicles (passenger cars, light commercial vehicles and industrial vehicles) increased by 5% in 2023. Unlike households, earmarked credit is almost non-existent (2%) and leasing arrangements account for 98% of credit financing files. Companies favour LSOA, which accounts for 55% of financing files in 2023, a decrease of 3 points compared to 2022. Conversely, the number of lease financing cases is up by 13% and now represents 43% of credit financing cases. However, the average value of lease financing cases is twice as high as that of loan-secured operations, which leads to a predominance of lease financing in amounts expressed in euros.

84% **Share of leasing in the credit financing of new cars purchased by households in France in 2023**

NEW CONSUMER CREDITS FOR INDIVIDUALS - EXCLUDING OVERDRAFTS, ANNUAL INTEREST RATE

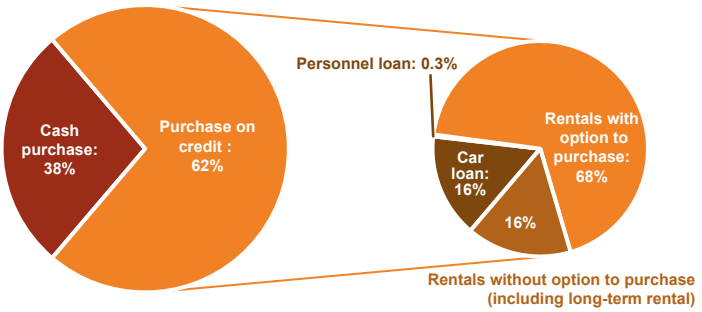


CUMULATIVE AMOUNTS OVER TWELVE MONTHS OF NEW CONSUMER CREDITS FOR INDIVIDUALS (EXCLUDING OVERDRAFTS)



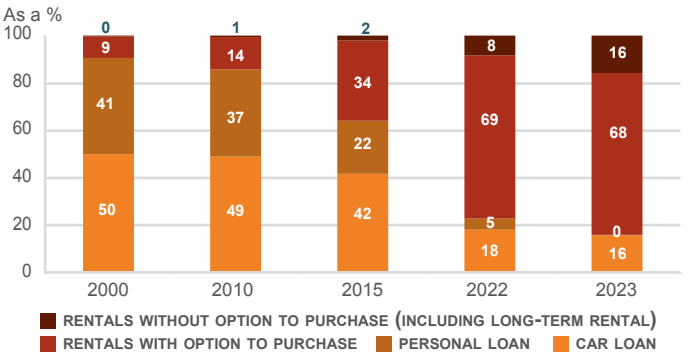
Source: Bank of France

METHOD OF FINANCING THE PURCHASE OF A NEW CAR BY INDIVIDUALS IN 2023



Sources: ASF, CCFA, Parc Auto Kantar

CHANGES IN CREDIT FINANCING OF NEW CARS PURCHASED



Sources: ASF, CCFA

Buyers of new or second-hand cars have recourse to financing if they cannot or do not want to buy with cash.

They have four financing options:

- Personal or bank loans granted by a bank or credit institution. The borrower is free to use his credit as he wishes.
- Earmarked car loans or traditional loans. These are granted by finance companies, which are subsidiaries of manufacturers and importers, or by finance companies that are independent of manufacturers but are subsidiaries of financial or banking groups. They are used for a specific purchase.
- Lease with option to purchase (LOA), also known as leasing, hire purchase or financial leasing. This is a consumer credit that allows you to have the use of a car in return for monthly payments during the lease period, which can be up to eighty-four months, or seven years. The option to purchase can be exercised during the lease or at the end of the term.
- Lease purchase (LPO) includes finance leasing and long-term leasing. These are transactions where the lessee does not have the option of becoming the owner at the end of the contract.

Results from various sources (professional associations, registration statistics, surveys, etc.) make it possible to estimate the use of credit by households buying a new car.

In 2023, the number of financing applications for the purchase of new vehicles is increasing at a slower rate than the increase in registrations. Even if, within credit purchases, rental formulas continue to develop, the increase in the cost of credit may have favoured, in 2023, the purchase of vehicles by personal contribution only, as evidenced by the Car Fleet survey.

AUTOMOBILE AND MOTORCYCLE TRADE AND REPAIR

The turnover of the automotive trade increased by 16.5% in 2023, in line with the rebound in sales volume (+11.7%) and with prices that continue to increase (+4% on average in 2023 for new cars). In the new 2020 base of the trade accounts published by INSEE, the turnover includes retail trade for vehicle sales, but also manufactured products, services and income from ancillary activities. In addition, it now includes wholesale trade and is expressed excluding taxes. On this new basis, it amounts to €184.5 billion in 2023.

The turnover generated by vehicle maintenance and repair amounts to €30 billion excluding tax, up 9.4% compared to 2022. With the rise of second-hand vehicles, the increase in the average age of the fleet and the length of ownership, workshop visits continue to grow (2.5 in 2022, compared to 1.8 in 2015), even if they remain lower than in 2019 (2.7 on average) due to the lower intensity of vehicle use.

+16,5% Change in turnover excluding VAT of the motor vehicle trade in France in 2023

► SALES NETWORKS IN FRANCE FOR LIGHT VEHICLES AS OF 1 JANUARY 2024

BRANDS	Primary network
Renault-Dacia	580
Peugeot	406
Citroën	379
Opel	223
DS	169
Fiat	203
Renault Group and Stellantis	1,960
Volkswagen	328
Toyota	269
Ford	220
Suzuki	220
Kia	217
Hyundai	202
Nissan	191
MG Motor	181
Skoda	166
Mercedes-Benz	165
Seat	161
BMW	156
Audi	145
Jeep	138
Mitsubishi	110
Mazda	105
Honda	82
Lexus	46
Tesla	24
Other brands	1,640
TOTAL	6,772

Source: Argus

The turnover of the automotive equipment retail trade reached €7.7 billion excluding taxes in 2023, up 6.4% compared to 2022.

Finally, the turnover of the retail fuel trade will be almost €20 billion in 2023, down 5.8% compared to 2022. The decline in total road fuel consumption (-2.6% according to the UFIP), combined with price stability, explains this decline.

Since the 1990s, the car distribution sector has been undergoing a continuous process of concentration, linked to increased geographical coverage and the development of multi-branding, which continues today.

In 2023, the 100 largest automotive distribution groups achieved a pre-tax turnover of €67.1 billion, a very sharp increase over one year (+21.8%) thanks to the recovery in sales volumes and the increase in prices. However, although they accounted for 71% of the market by value in 2023, up 3 points year on year, they only accounted for 59% of sales by volume, down one point compared to 2022. The top ten groups, meanwhile, account for 27% of sales by value and 21% by volume. Six groups now have a turnover of more than €2 billion (compared with four in 2022) and twenty groups have recorded a turnover of more than €1 billion, compared with 15 last year and 9 in 2020. The top 10 distributors accumulated a turnover of €25.5 billion, an increase of 21% over one year.

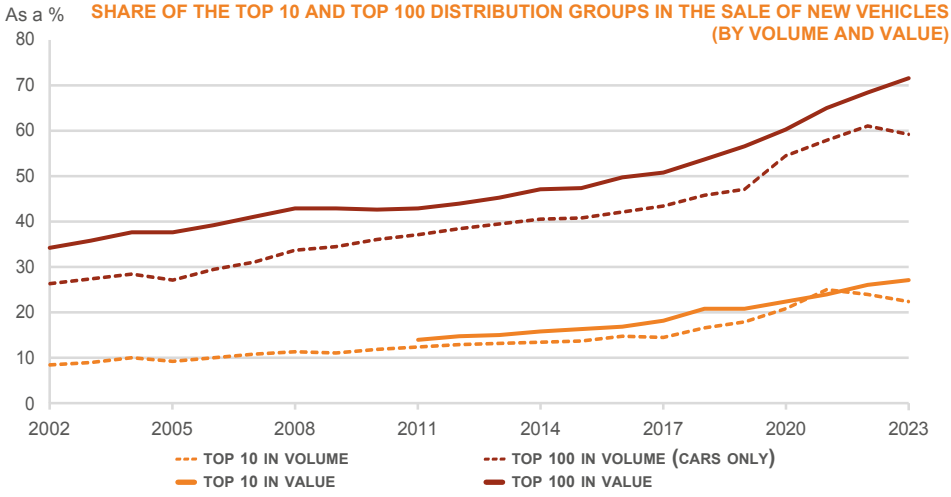
According to INSEE-Esane data, the operating margin rate (gross operating surplus/value added at factor cost) of the motor vehicle trade has increased in recent years, from 15% in 2015 to 25% in 2021. The investment rate (tangible investment / value added excluding taxes) has risen from 11% to 21%. In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

► TURNOVER FROM TRADE AND REPAIR OF AUTOMOBILES AND MOTORCYCLES (IN BILLIONS OF CURRENT EUROS EXCLUDING VAT)

Activities	2010 (1)	2019	2020	2021	2022 (sd)	2023 (p)	Variation 2023/2022	Variation 2023/2019
Sale of motor vehicles	115.9	151.6	136.0	155.0	158.4	184.5	16.5%	21.7%
Maintenance and repair of motor vehicles	22.8	24.1	22.7	25.3	27.4	30.0	9.4%	24.5%
Retail sale of automotive equipment	5.7	6.3	6.0	6.8	7.2	7.7	6.4%	22.8%
Sale and repair of motor-cycles	4.4	5.4	5.5	6.4	6.6	7.0	6.1%	29.1%
Retail sale of fuels	17.3	18.1	13.7	16.9	21.1	19.9	-5.8%	9.9%
TOTAL	165.9	205.5	183.8	210.3	220.7	249.1	12.8%	21.2%

(1) CCFA estimates.
Source: INSEE-Trade accounts, 2020 base of national accounts: (sd) semi-final; (p) provisional

SHARE OF THE TOP 10 AND TOP 100 DISTRIBUTION GROUPS IN THE SALE OF NEW VEHICLES (BY VOLUME AND VALUE)



Source: Argus

To guarantee a high level of sales and after-sales service, the distribution networks of car brands rely on the selection of distributors and repairers who can apply the requirements of the latter and of customer service. Cooperation between manufacturers, their distributors and their authorised repairers ensures, in addition to maintenance and repair, warranty service, user safety, environmental protection, the availability of spare parts and information on technical developments.

On 1 January 2024, the primary network, made up of manufacturers' subsidiaries and dealers, had 6,772 sales outlets out of a total of 16,421 sales outlets in France.

In terms of car repairs, in addition to the manufacturers' networks (authorised repairers, dealers and agents, i.e. around 13,000 players), there are also independent networks: MRA (Mécaniciens Réparateurs Automobiles) and auto centres, fast repair centres and tyre specialists. In 2022, according to ANFA, there were 20,300 automotive repair technicians, with significant growth over the past 9 years, and 4,600 fast-repair car centres or tyre specialists, with slight growth in recent years. These independent networks benefit more than the manufacturer networks from the ageing of the fleet because their activity is more concentrated on the repair of older vehicles (7-9 years old) which generate more workshop entries. The manufacturer networks, for their part, specialise more in predictive maintenance operations on recent vehicles or electronic fault-finding. According to GIPA, in terms of workshop entry volume, , the MRA are the market leaders, with 34% of the volume in 2022, followed by the manufacturers' networks (30%, compared with 34% in 2016), car centres (19%, compared with 16% in 2016), tyre manufacturers (7%) and fast repairers (5%).

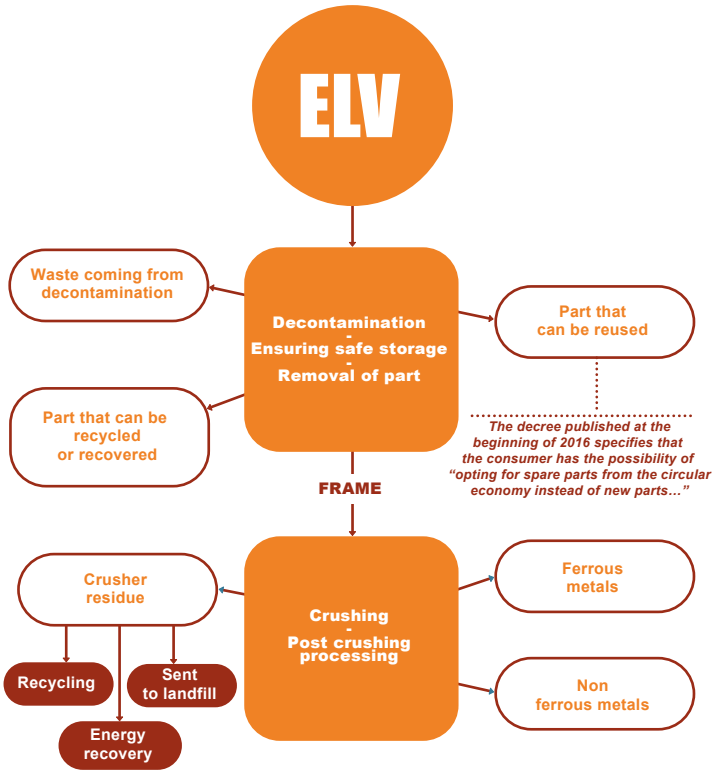
CIRCULAR ECONOMY

According to ADEME, the French Environment and Energy Management Agency, 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 resource use and reduce the impact on the environment. In the automotive industry, the circular economy concerns the vehicle and its consumables (tyres, oils, batteries, etc.), including in the production phase.

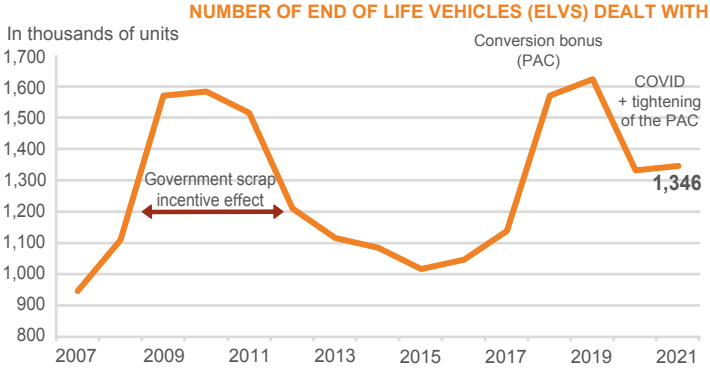
An end-of-life vehicle (ELV) is a vehicle that has reached the end of its life and that its last owner must hand over to an authorised ELV centre for destruction, recycling and recovery. ELV recovery targets are set by European and national regulations. In 2021, 1.35 million ELVs were taken care of by the authorised sector, compared to 1.1 million in 2017. This number, after falling in 2020 with the COVID pandemic and the lockdown (cessation of activity at the ELV centres, fall in the new and second-hand market, reduction in the number of accidents), is up slightly in 2021.
ADEME measures the reuse and recovery rate of end-of-life vehicles. This ratio is the sum of the reuse and recycling rate and the energy recovery rate. This rate, which stands at 96% in 2021, has increased by 14 points in ten years.

1.35 million **Number of end-of-life vehicles taken care of in 2021**

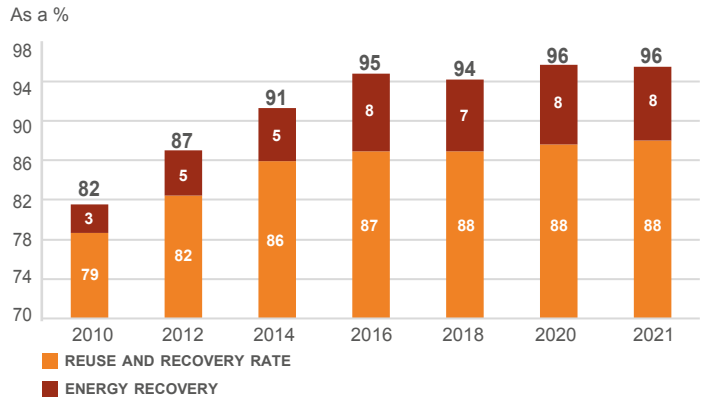
► SIMPLIFIED CHART OF PROCESSING OF AN ELV



NUMBER OF END OF LIFE VEHICLES (ELVS) DEALT WITH



ELV REUSE AND RECOVERY RATE



Source: ADEME

In France, 1.35 million end-of-life vehicles (ELVs) were taken care of by the sector in 2021 and processed by approximately 1,736 ELV centres. 92% of these ELVs are private cars, with an average weight of 1,135 kg in 2021 (974 kg in 2010).

An ELV is made up of a wide variety of materials, which makes its reprocessing complex. It consists of 75% metals (ferrous metals: 70%, non-ferrous metals: 4% and electrical wiring: 1%), 12% plastics, 4.5% rubber (tyres and other), 3% glass, 2% textiles, 1% used oils and liquids.

The first stage of processing consists of depollution 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 2022, the collection of car batteries (almost exclusively lead batteries, used for the starter, lighting or ignition systems) fell by 10% after a sharp increase in 2021, while their volume placed on the market is slowing down. Lithium batteries, on the other hand, have seen a sharp increase in the number placed on the market (+22% compared to 2021), with the development of electric and hybrid vehicles and sometimes the replacement of lead batteries with lithium batteries to power automotive equipment. The European Commission has proposed a European regulation aimed at setting up a circular economy sector to manage all stages of the battery life cycle, from design to waste treatment. This regulation, which comes into force on 10 July 2023, sets lithium-ion battery recycling efficiency targets of 61% by 2031.

The second stage of processing is the dismantling of used tyres and parts for resale or recycling. The collection of the automotive tyre sector (light vehicles and heavy goods vehicles) amounted to 530,682 tonnes in 2022, an increase of 6% compared to 2021. The collection rate was 100%. In 2022, 48.6% of these tyres were destined for energy recovery (substitute fuel in cement works, for example), 38% for material recovery, of which a little over half for granulation (sports fields, street furniture), 13.4% for reuse (resale of second-hand tyres, retreading and the rest for other forms of recovery).

The resale of used spare parts contributes to the achievement of recycling rates and contributes to the economic balance of the automotive sector. More than 115,000 tonnes of parts were dismantled from end-of-life vehicles for reuse in 2021, i.e. 85.5 kg per end-of-life vehicle, an increase of 3 kg compared to 2020. This market grew strongly after the Covid crisis because many new spare parts experienced stock problems and saw their prices rise sharply. The second-hand parts market has grown and today represents between 4% and 6% of the repair parts market depending on the age of the car.

Crushing the carcass and extracting materials for recycling and recovery is another stage in the treatment of ELVs, but certain consumable parts (oils, batteries, etc.) are already recycled during the vehicle's life. In addition, car manufacturers plan to use an increasing proportion of recycled materials, particularly certain plastics such as polypropylene, to offer parts made entirely or partially from recycled materials, such as bodywork components or interior trim.

CIRCULAR ECONOMY

At the European level, the regulations (Directive 2000/53/EC of 18 September 2000) set targets for the recovery of end-of-life vehicles at 85% of the average mass of vehicles for recycling and 95% of the average mass for recovery.

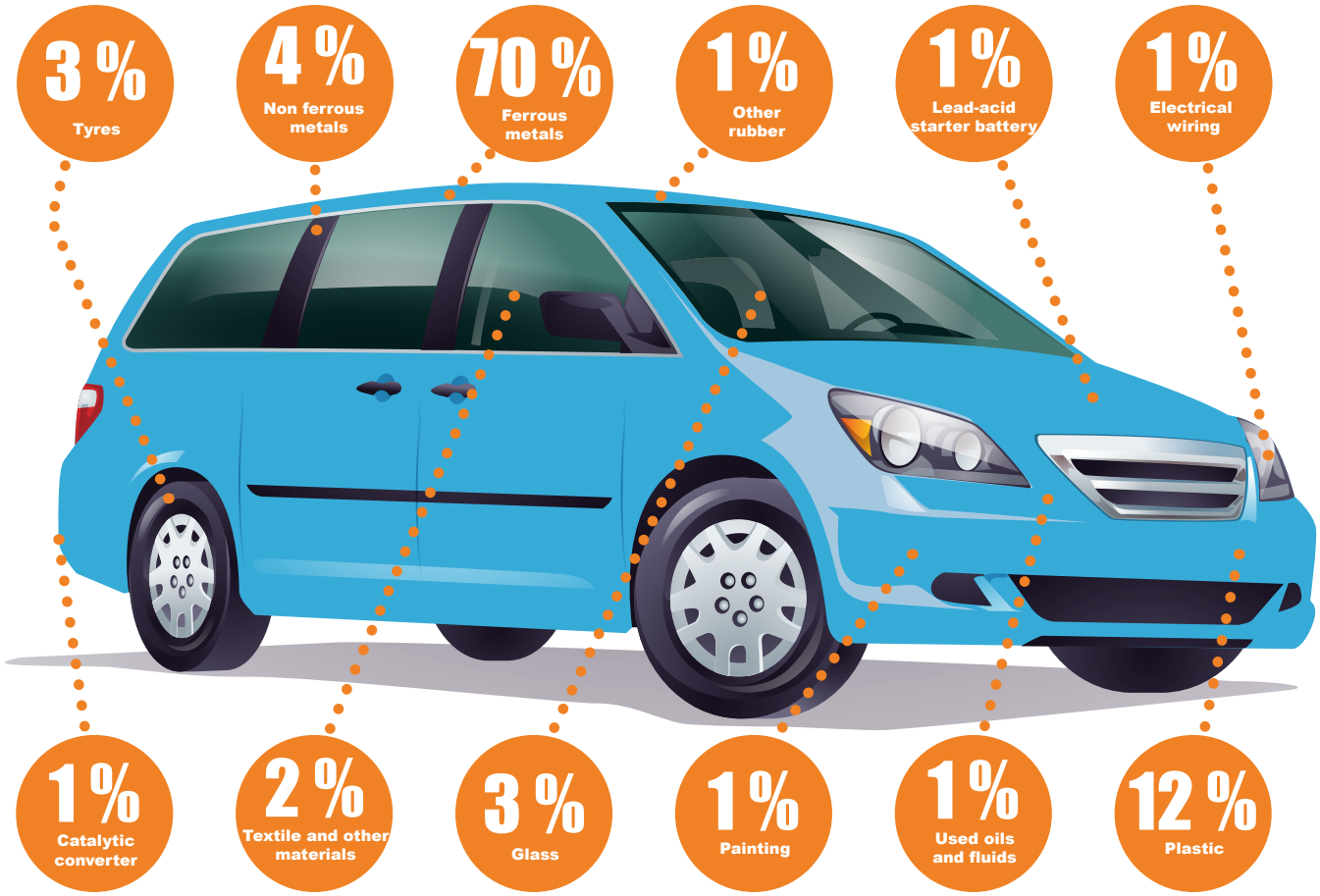
At the national level, the regulatory framework is defined by articles R.543-153 and following of the Environment Code. Vehicles are placed on the market by producers (manufacturers and importers) via a network of distributors. At the end of its life, the vehicle must be handed over to an approved ELV centre from among the 1,600 treatment centres, which must take it back free of charge so that it can be processed according to precise specifications, enabling compliance with health and environmental regulations. The latter is responsible for depolluting it (removal of fluids, oils, fuels, brake fluid, air conditioning, batteries and securing pyrotechnic devices) and dismantling parts for second-hand resale or recycling, then sends the resulting carcass to one of 60 approved shredders (2021 data, ADEME). These crush the vehicle in order to separate the different materials it is made of. These materials, once they have been sorted, can be reused 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 10 February 2020 and the Climate and Resilience law of 22 August 2021 have provided for the establishment of a complete EPR (Extended Producer Responsibility) scheme for motor vehicle producers (passenger cars, vans, two- or three-wheeled motor vehicles and motor quadricycles). From 1 January 2024, new vehicle manufacturers will have to fulfil their extended responsibility obligation by transferring it to an eco-organisation or by setting up an individual system approved by the Ministry of the Environment. An order dated 20 November 2023 defined the specifications that apply to these players and introduced an obligation to collect and transport ELVs, including abandoned ones, free of charge throughout the country.

The Energy Transition for Green Growth Act of 17 August 2015 also helps to promote the market for parts from the circular economy (PIEC), by requiring maintenance and repair professionals to inform consumers of the possibility of opting to use parts from the circular economy instead of new parts for certain categories of spare parts. The decree of 30 May 2016 specifies that parts from the circular economy are defined as components and elements marketed by authorised ELV centres, or components and elements reconditioned in accordance with the manufacturer's specifications and marketed under the heading 'standard exchange' (decree of 4 October 1978).

96% **Rate of reuse and recovery in the automotive sector in 2021**

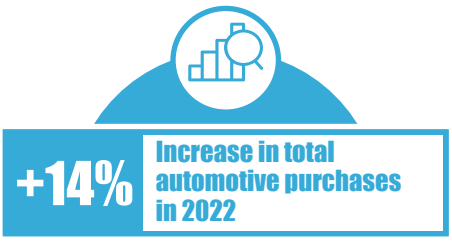
► **COMPOSITION OF AN END OF LIFE VEHICLE IN 2020**



Source: ADEME

For many years, car manufacturers have been integrating the circular economy into their development plans. In the Renault group, the Refactory in Flins offers the deployment of four areas of activity in the service of the circular economy: reconditioning of second-hand 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 every stage of a vehicle's life (construction, use, etc.). Stellantis, for its part, has a Business Unit dedicated to the circular economy and in November 2023 inaugurated its first Circular Economy Hub within the Mirafiori complex in Italy. This will initially host remanufacturing activities for engines, gearboxes and high-voltage electric batteries, as well as vehicle reconditioning and deconstruction. Finally, Renault Trucks, which already offers the transformation of second-hand vehicles in the Used Trucks Factory in Bourg-en-Bresse and remanufacturing in the Limoges factory, opened the Used Parts Factory in Vénissieux in September 2022, intended for the dismantling of end-of-life trucks and the reuse of their parts for future commercialisation.

AUTOMOTIVE INDUSTRY PRODUCTION AND ITS ECONOMIC IMPACT



Production of the automotive branch grew in 2022, for the second consecutive year after the sharp decline in 2020. Expressed in the new 2020 base of the national accounts published by INSEE, it stood at €79.2 billion, an increase of 13% compared to 2021. However, it is still 6% lower than in 2019.

The branch's purchases amounted to €65.2 billion in 2022 (2020 base), an increase of 14% compared to 2021, but still 8% lower than in 2019 (€70.7 billion).

The Added Value (AV) of the automotive branch amounted to €14 billion in 2022, up 12% on the previous year, and a level that exceeds that of 2019 for the first time. Gross operating surplus (GOS) is also up in 2021 and 2022 and is now higher than in 2019. The margin rate (EBITDA/VA), which had fluctuated around 40% since 2015 and had fallen to 35% in 2020, rose sharply in 2021 and 2022 (48.7%).

The Gross Fixed Capital Formation (GFCF) necessary for the transformation of the branch's activity in the context of the energy transition (factories, R&D) increased in 2022 (+9%) to reach €5 billion in the new 2020 base. The investment rate (GFCF/VA), which stands at 36.6%, is, however, well down on 2019 (46.5%).

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

		2015	2019	2020	2021	2022 (1)
PURCHASES FROM OTHER BRANCHES	%	**49.6**	**47.4**	**45.3**	**44.5**	**44.4**
Electrical, electronic, computer equipment and machinery	%	10.5	10.7	10.3	10.6	10.1
Manufacture of computer, electronic and optical products	%	2.7	2.8	2.9	2.9	2.8
Manufacture of electrical equipment	%	2.7	2.7	2.4	2.5	2.6
Manufacture of machinery and equipment not included elsewhere	%	5.1	5.3	5.0	5.1	4.8
Other industries (including Coking and refining)	%	**18.9**	**17.4**	**16.5**	**16.3**	**16.5**
Metallurgy and manufacture of metal products	%	6.5	6.1	5.5	5.2	5.4
Manufacture of rubber, plastics and mineral products	%	7.5	6.8	6.5	6.6	6.3
Other manufacturing industries (including repair and installation)	%	0.7	0.7	0.6	0.6	0.6
Chemical industry	%	1.1	0.9	0.9	0.8	0.9
Manufacture of textiles, clothing, leather and footwear industries	%	1.3	1.1	1.2	1.1	1.1
Woodworking, paper and printing industries	%	0.6	0.6	0.5	0.5	0.5
Mining, energy, water	%	**1.4**	**1.3**	**1.5**	**1.2**	**1.4**
Electricity, gas, steam and air conditioning	%	0.8	0.8	1.0	0.8	0.9
Water, sanitation, waste management and decontamination	%	0.5	0.5	0.4	0.4	0.4
Construction	%	**0.2**	**0.2**	**0.2**	**0.2**	**0.2**
Sale and repair of automobiles and motorcycles	%	**1.0**	**0.8**	**0.8**	**0.8**	**0.7**
Transport and storage	%	**2.6**	**2.5**	**2.3**	**2.1**	**2.0**
Information and communication	%	**1.8**	**2.0**	**2.0**	**2.0**	**2.0**
Financial and insurance activities	%	**0.9**	**0.8**	**0.9**	**0.9**	**0.8**
Real estate activities	%	**1.1**	**1.0**	**1.0**	**0.9**	**0.8**
Business support	%	**10.1**	**9.4**	**8.9**	**8.7**	**8.8**
Legal, accounting, control and technical analysis, …	%	5.3	5.0	4.8	4.7	4.6
Scientific research and development	%	0.0	0.0	0.0	0.0	0.0
Other specialized, scientific and technical activities	%	3.4	3.2	3.0	2.9	3.0
Administrative and service activities support	%	0.0	0.0	0.0	0.0	0.0
Other tertiary sector	%	**1.2**	**1.2**	**0.9**	**0.9**	**1.0**
All purchases from the tertiary sector	%	**18.6**	**17.7**	**16.8**	**16.2**	**16.2**
PURCHASES FROM THE BRANCH	%	**50.4**	**52.6**	**54.7**	**55.5**	**55.6**
Production of the branch at basic prices	billions of current €	**67.1**	**84.1**	**63.9**	**69.9**	**79.2**
As a percentage of production at basic prices	%	100.0	100.0	100.0	100.0	100.0
Total purchases (2)	billions of current €	**54.2**	**70.7**	**53.4**	**57.4**	**65.2**
As a percentage of production at basic prices	%	80.8	84.0	83.6	82.1	82.3
Value added from the branch	billions of current €	**12.9**	**13.5**	**10.5**	**12.5**	**14.0**
As a percentage of production at basic prices	%	19.2	16.0	16.4	17.9	17.7
Gross operating surplus (GOS)	billions of current €	**5.1**	**5.5**	**3.6**	**5.6**	**6.8**
As a percentage of value added (Margin rate)	%	39.7	40.7	34.7	45.1	48.7

(1) These data are provisional.
(2) Total purchases (intermediate consumption): value of goods and services transformed or entirely consumed during the production process. The distribution of purchases by sector is expressed in volume. Since the 2010 base, research and development costs are no longer included in intermediate consumption, but in GFCF. Wear and tear on fixed assets implemented is not taken into account; it is recorded in fixed capital consumption.
Source: INSEE - National accounts (2020 base)

The intermediate input table (IIT) describes the intermediate consumption of each activity branch in different products. The level and structure of this table were re-estimated when the national accounts were converted to the new 2020 base. The flows of goods and services within multinationals are better considered in the 2020 base, which may explain the significant differences with the 2014 base of previous editions.

According to the TEI in base 2020, more than 50% of the total purchases of the automotive industry, which represent more than three quarters of its production, are made from the industry itself.

Purchases from machinery and equipment manufacturers (excluding electrical, electronic and computer products) represent 5% of total purchases, which is as much as purchases from manufacturers of electrical equipment, computer and electronic products.

Purchases from 'other industries' account for 16% of all purchases, with metallurgy and the manufacture of metal products remaining the leading suppliers (12% of total purchases, declining slightly but steadily).

Finally, purchases from the tertiary sector represent around 16% of total purchases, a slight decrease in recent years, with a share intended for business support activities, which is also decreasing (8.8% in 2022, compared to 9.5% in 2018).

OEMS AND INDUSTRIAL SUPPLIERS TO THE AUTOMOTIVE INDUSTRY

Car manufacturing is a structuring industry for its suppliers and for the French economy. It brings together various players of different sizes, trades and ranks. It involves the equipment sector and other suppliers, such as plastics, industrial rubber, foundries and industrial metal services, but also new players linked to the energy transition (power electronics, batteries, recycling, retrofitting, etc.). The automotive industry is made up of car manufacturers and all their suppliers.

The upstream part of the industry brings together light vehicle manufacturers, tier 1 equipment manufacturers and suppliers, as well as numerous subcontractors from a wide range of sectors (mechanical engineering, plastics processing, rubber, electronics); it also includes commercial vehicle manufacturers and coachbuilders. It employs 330,000 people in France excluding temporary workers (2019), has an export value of €58 billion (2023) and a share of 9.5% of the turnover of the French manufacturing industry (Esane 2022).

In recent years, faced with international competition in terms of competitiveness, the sector has lost 40% of its jobs between 2006 and 2023, with different impacts depending on the region and the subcontractors. The energy transition also has an impact on employment, both in terms of a decrease in volume and in the structure of jobs and skills. The sub-sectors linked to combustion engines and traditional activities (mechanical engineering) will be more impacted in terms of employment, to the benefit of the IT, electronics and chemical (batteries) sectors and new activities linked to recycling and the circular economy.

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

► AUTOMOTIVE INDUSTRY WORKFORCE BY ACTIVITY

(IN THOUSANDS OF FULL-TIME EQUIVALENTS)

Industry	Employees as a % of total
Manufacturers or engine manufacturers	29%
Equipment manufacturers	15%
Metal products	11%
Rubber and plastic products	11%
Metallurgy	9%
Computer, electronic and optical products	6%
Mechanical parts	6%
Bodybuilders or fitters	4%
Electrical equipment	4%
Chemical products	4%
Glass products	1%
Textiles	0.5%
Refined petroleum products	0.3%

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

► AUTOMOTIVE INDUSTRY SUB-SECTORS ACCORDING TO THE IMPACT OF THE TRANSITION ON THEIR JOBS

Risk group	Intermediate group	Growing Group
Bar turning	Rubber	Electronics / Electrical
Stamping	Aluminium foundry / extrusion	ePowertrain
Cast iron foundry	Plastics	
Forging	Fabric / Textile	
Metal processing	Fixing	

Source: Alixpartner/PFA study, November 2021

► TURNOVER, ADDED VALUE AND EXPORT RATE OF THE AUTOMOTIVE SECTOR

	Turnover excluding tax (in billions of €)	Added value (in billions of €)	Export rate (as a %)
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 sector in the manufacturing industry	16%	11%	-

(1) 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 sector; INSEE Esane 2011; DGE calculations

According to a study by the Direction Générale des Entreprises published in 2024, the core of the sector (construction, bodywork, equipment) accounts for 47% of the companies and 55% of the workforce in the sector, compared with 53% and 45% for subcontractors (peripheral activities). The core accounts for 70% of the turnover of products in the automotive value chain and the periphery for the remaining 30%. The study shows that 42% of subcontractors other than equipment manufacturers are highly dependent on the sector, with more than 50% of their turnover in the automotive industry; 22% even achieved more than 90% of their turnover in the automotive industry. The peripheral sectors with companies heavily involved in the automotive industry are those manufacturing metal products, non-metallic mineral products, machinery and equipment, metallurgy, textiles and rubber products.

Over the last fifteen years, the automotive sector (DGE perimeter) has seen a significant drop in its workforce, from 441,000 'full-time equivalent' employees in 2012 to 400,000 in 2018, and then 350,000 in 2022.

According to data from the FIEV (Federation of Vehicle Equipment Industries), the number of equipment manufacturers' employees stood at 56,498 as of 31 December 2023, an 18% decline compared to 2019. Turnover continued to rise for the third consecutive year, reaching €16.4 billion (+9.4%) in 2023, which is still 10% lower than in 2019. The share of turnover destined for export amounts to 56%. Equipment manufacturers target two types of market: original equipment, where the equipment is intended for assembly lines, and aftermarket or replacement equipment. The share of turnover generated by original equipment in France accounted for 40% of the total in 2021, or more than 80% when exports are added. The process of outsourcing has resulted in even greater reliance on suppliers, whose services represent a high and growing share of the cost price of manufacturing a vehicle (around 85% according to the FIEV). However, a process of re-insourcing certain activities is now emerging.

The French automotive industry still relies on its industrial base. It represents significant shares of the technical plastic parts business, the industrial rubber and foundry markets, and industrial metal services (cutting, stamping, industrial mechanics, bar turning, forging, stamping, die-stamping and metal coatings) to which are added purchases from the steel industry (25% of tonnages to the automotive industry), the chemical industry (10% for all transport materials), and energy producers. Almost a fifth of plastics processing and electronic equipment activities and 10% of the domestic market for mechanical industries concern the automotive industry. In forging and foundry work, this share is around 50%, and this ratio rises to 70% in the polymers and rubber sector.

Today, the sector is still very dependent on the production of combustion vehicles. The energy transition therefore has significant consequences for the entire sector and will have very different impacts depending on the sub-sectors considered. A study by Alix Partner / PFA (November 2021) highlighted three sub-sector profiles according to their exposure to change: a group of sub-sectors at risk which concerns traditional activities and those linked to the heat engine (screw cutting, 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, 2.3 million people had their jobs secured by the automotive industry in 2023, i.e. more than 8% of the working population.

Strictly speaking, the automotive industry employs around 212,000 people, or 7% of salaried employment in the industry (including extractive industries, food industries and industrial companies), which has been steadily declining for several years.

► JOBS DIRECTLY OR INDIRECTLY RELATED TO THE AUTOMOTIVE INDUSTRY IN 2023

(IN THOUSANDS OF PEOPLE)

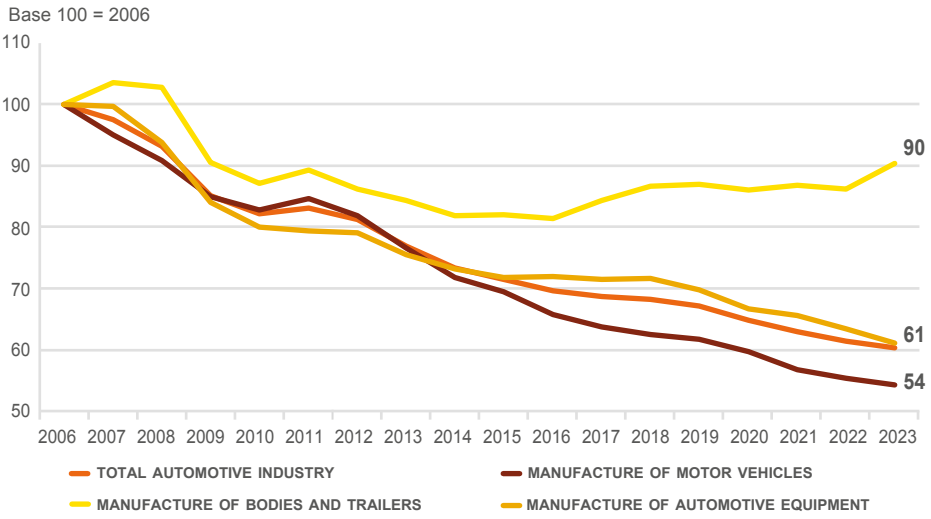
	2023
Production activities	**408**
Total raw materials and services	**196**
Manufacturing and energy industry	108
Services	88
Automotive industry	**212**
Automotive construction	105
Equipment, accessories	84
Bodywork, trailers, caravans	23
Cars use	**560**
Car sales, repairs, sales of automotive equipment, technical inspection, short-term rental, dismantlers and recyclers, mobility services, driving schools...	434
Insurance, experts, credit, long-term rental, etc.	90
Others (independent fuel distribution, self-employed, etc.)	28
Sports, press, publishing, miscellaneous	8
Transport	**1,383**
Road transport of goods and passengers (for others and own account), related services	1,236
Police, health, education, administration (non-market services)	30
Construction, road maintenance and related activities	117
Total jobs induced by the automobile	**2,350**

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

From the early 2000s, the lack of competitiveness of France as a business location weighed on automotive industrial activities (all components combined), including upstream activities. This led to a decline in the workforce well before the 2009 crisis. During the crisis, public policies to support activity and businesses limited the impact of the crisis on employment. In the following decade, the economic policy measures of all the players helped to improve productivity. However, they failed in reducing the competitiveness deficit with other European countries, which captured the production of B-segment vehicles, or in halting 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 related to the automotive industry. Since then, employment has remained under pressure from external competition and continues to decline. In addition to this trend, there are now the effects of the ecological transition on employment with the creation of new professions (electric motors, recycling, etc.), but this will not compensate for the decline in activities related to thermal energy, which is more labour-intensive.

8% Share of the working population employed in France in the automotive industry (direct and indirect jobs and jobs related to road transport)

EVOLUTION OF THE WORKFORCE IN THE AUTOMOTIVE INDUSTRY BY MAIN ACTIVITY



Source: ACOSS

The automotive industry, one of the main contributors to industrial production in France, generated around 410,000 jobs through its production and its purchases from other branches, whether industrial or service (including temporary work), i.e. around 17% of total employment related to the automotive industry. The number of temporary workers concerned, in full-time equivalent (FTE) jobs, averaged around 21,000 people between 2011 and 2015, which corresponded to years of low production in France. However, this figure can reach 35,000 people when production is at a high level, as was the case in 2017 and 2018. In 2020, the number of temporary workers fell back to 18,700 and rose again to 27,000 in 2023.

In terms of usage, the professions are by nature less sensitive, due to their links with the car fleet, which is still growing slightly. Approximately 560,000 jobs (i.e. a quarter of the total workforce) are related to car use, particularly in the vehicle-related services sector (sales, repairs, car equipment sales, hire, etc.), the fuel and recycling sector (oil, wreckers, etc.), as well as mobility services and driving lessons. These figures correspond to both employees and sole traders (or the self-employed).

Finally, road transport (passengers and goods) and its infrastructure employed nearly 1.4 million people, i.e. more than half of the total employment related to the automotive sector. Thanks to the slight recovery in road passenger transport after the COVID crisis and the rebound in freight transport, employment increased in 2022 and 2023. On the infrastructure side, the public works sector had increased its level of employment in 2022 with the recovery of public orders, but this is in slight decline in 2023 in a context of recruitment difficulties in the sector.

THE FRENCH AUTOMOTIVE INDUSTRY

→ ANALYSIS & STATISTICS
2024 EDITION

CCFA

8.8 million vehicles — Produced by the Stellantis and Renault groups worldwide in 2023

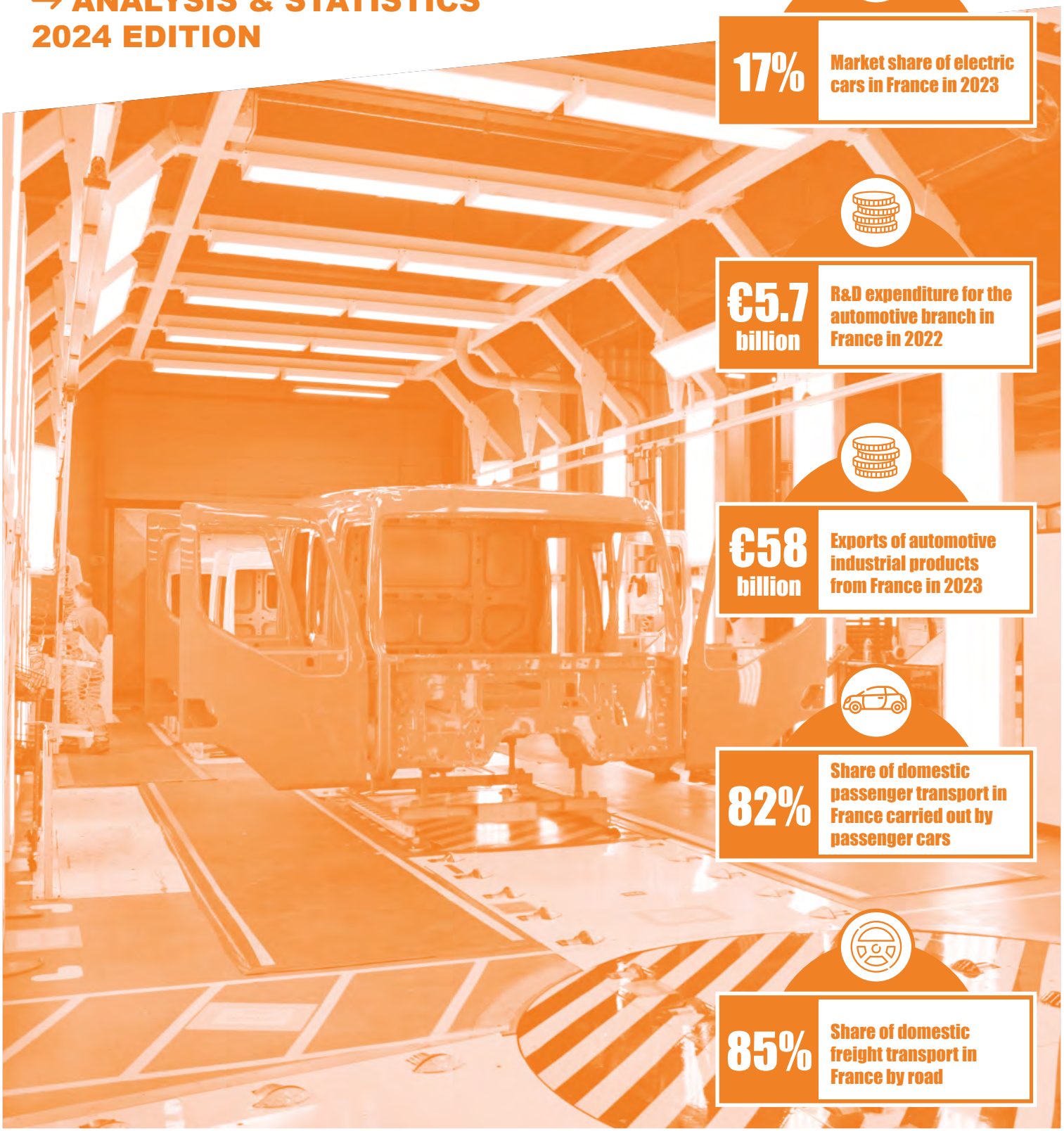
17% — Market share of electric cars in France in 2023

€5.7 billion — R&D expenditure for the automotive branch in France in 2022

€58 billion — Exports of automotive industrial products from France in 2023

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

85% — Share of domestic freight transport in France by road



WORLD PRODUCTION

Production for each country corresponds to national declarations. Double counting is eliminated in the totals for geographical areas.

► PASSENGER CARS (in units)

	2000	2010	2015	2019	2020	2021	2022	2023
EUROPE	17,407,047	17,330,380	18,545,798	18,721,384	14,556,174	13,852,281	13,727,841	15,449,729
Western Europe	14,778,879	12,110,446	12,636,580	11,678,070	8,636,308	8,009,637	8,546,733	9,551,152
Germany	5,131,918	5,552,409	5,708,138	4,663,749	3,515,488	3,096,165	3,480,357	4,109,371
Belgium	912,233	528,996	369,172	247,020	237,057	224,180	243,293	285,159
Spain	2,366,359	1,913,513	2,218,980	2,248,291	1,800,664	1,662,174	1,787,197	1,907,050
France	2,879,810	1,924,171	1,555,000	1,662,963	927,344	918,825	1,010,466	1,026,690
Italy	1,422,284	573,169	663,139	542,472	451,718	443,819	473,194	541,953
The Netherlands	215,085	48,025	57,019	176,113	127,058	107,021	101,670	123,379
Portugal	178,509	114,563	115,468	282,142	211,281	229,221	256,018	243,201
United Kingdom	1,641,452	1,270,444	1,587,677	1,303,135	920,928	859,575	775,014	905,117
Sweden	259,959	177,084	188,987	279,000	249,000	258,023	238,955	276,750
Central and Eastern Europe	2,330,692	4,616,540	5,118,191	6,060,672	5,064,823	5,059,808	4,370,219	4,945,910
Turkey	297,476	603,394	791,027	982,642	855,043	782,835	810,889	952,667
AMERICA	10,022,089	8,228,067	9,394,539	7,004,767	4,967,015	4,491,915	4,784,773	5,146,607
CUSMA	8,371,806	5,084,330	7,019,427	4,369,893	3,219,558	2,559,194	2,650,980	3,025,512
Canada	1,550,500	967,077	888,565	461,370	327,681	288,235	289,371	376,588
United States	5,542,217	2,731,105	4,162,808	2,511,711	1,924,398	1,562,717	1,703,608	1,745,171
Mexico	1,279,089	1,386,148	1,968,054	1,396,812	967,479	708,242	658,001	903,753
South America	1,650,283	3,143,737	2,375,112	2,634,874	1,747,457	1,932,721	2,133,793	2,121,095
Argentina	238,921	508,401	308,756	108,364	93,001	184,106	257,505	304,783
Brazil (1)	1,351,998	2,584,690	2,017,639	2,448,490	1,607,175	1,707,851	1,824,833	1,781,612
ASIA-OCEANIA	13,573,073	32,408,358	40,125,960	40,650,626	35,822,949	38,188,956	42,324,552	46,612,738
China	605,000	13,897,083	21,143,351	21,389,833	19,994,081	21,444,743	23,836,083	26,123,757
South Korea	2,602,008	3,866,206	4,135,108	3,612,587	3,211,706	3,162,727	3,438,355	3,908,747
India	517,957	2,831,542	3,408,849	3,629,008	2,836,534	3,631,095	4,439,144	4,783,628
Japan	8,359,434	8,310,362	7,830,722	8,329,130	6,960,411	6,619,245	6,566,356	7,765,428
AFRICA	213,444	356,872	604,130	795,720	562,477	582,814	716,195	810,825
South Africa	230,577	295,394	341,025	348,665	238,216	239,267	309,423	336,615
TOTAL	41,215,653	58,323,677	68,670,427	67,172,497	55,908,615	57,115,966	61,553,361	68,019,900

► COMMERCIAL VEHICLES (in units)

	2000	2010	2015	2019	2020	2021	2022	2023
EUROPE	2,783,468	2,529,925	2,672,648	2,851,062	2,395,787	2,528,595	2,502,462	2,672,688
Western Europe	2,326,653	1,686,875	1,794,888	1,941,872	1,573,402	1,617,815	1,549,678	1,614,888
Germany	394,697	353,576	325,226	283,567	227,082	212,527	197,463	N/A
Belgium	121,061	26,306	40,081	38,777	30,236	36,858	42,180	46,944
Spain	666,515	474,387	514,221	574,341	467,521	435,959	432,239	544,171
France	468,551	305,250	417,000	509,552	388,653	433,401	372,707	478,386
Italy	316,031	265,017	351,084	372,819	325,339	353,424	323,200	338,100
The Netherlands (2)	52,234	46,107	2,252	N/A	N/A	N/A	N/A	N/A
Portugal	68,215	44,166	41,158	63,546	52,955	60,733	66,386	75,030
United Kingdom	172,442	123,019	94,479	78,270	66,116	72,913	101,600	120,357
Sweden	41,384	40,000	N/A	N/A	N/A	N/A	N/A	N/A
Central and Eastern Europe	323,203	351,887	309,991	430,588	379,550	417,475	411,025	542,074
Turkey	133,471	491,163	567,769	478,602	442,835	493,305	541,759	515,726
AMERICA	9,761,798	8,119,880	11,567,600	13,155,634	10,725,912	11,698,920	12,968,763	13,990,284
CUSMA	9,325,214	7,069,234	10,935,086	12,452,713	10,154,846	10,907,871	12,144,439	13,141,116
Canada	1,411,136	1,101,112	1,394,742	1,455,215	1,048,446	826,767	943,989	1,176,438
United States	7,257,640	5,011,988	7,943,180	8,381,173	6,896,628	7,594,488	8,349,350	8,866,384
Mexico	656,438	956,134	1,597,164	2,616,325	2,209,772	2,486,616	2,851,100	3,098,294
South America	436,584	1,050,646	632,514	702,921	571,066	791,049	824,324	849,168
Argentina	100,711	208,139	217,901	206,423	164,186	250,647	279,388	305,942
Brazil (1)	329,519	797,038	411,782	496,498	406,880	540,402	544,936	543,226
ASIA-OCEANIA	4,497,938	8,600,629	7,863,313	8,683,215	8,453,600	8,579,844	7,696,666	8,503,099
China	1,464,000	4,367,678	3,423,899	4,360,817	5,231,161	4,676,969	3,184,532	4,037,209
South Korea	512,990	405,535	420,849	338,027	295,068	299,677	318,694	334,850
India	283,403	725,531	751,736	895,358	545,285	768,017	1,018,098	1,067,879
Japan	1,781,362	1,318,558	1,447,516	1,355,377	1,107,532	1,217,663	1,269,183	1,232,012
AFRICA	115,305	158,204	232,291	317,931	237,524	324,488	307,331	360,428
South Africa	126,787	176,655	274,633	283,256	208,997	259,820	246,466	296,357
TOTAL	17,158,509	19,408,638	22,335,852	25,007,842	21,812,823	23,131,847	23,475,222	25,526,499

(1) From 2010, Brazilian production is excluding CKD.
(2) Production in the Netherlands is excluding DAF from 2012 and excluding Ginaf and Scania from 2014.
Sources: OICA, CCFA

REGISTRATIONS

► NEW PASSENGER CAR REGISTRATIONS BY COUNTRY (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022	2023
EUROPE	17,276,982	17,906,455	16,499,863	16,410,563	17,948,525	14,176,858	14,016,068	12,637,480	14,998,857
Western Europe (1)	14,725,982	14,565,695	12,984,549	13,261,258	14,292,164	10,807,689	10,599,994	10,163,473	11,577,466
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	2,844,609
Belgium	515,204	480,088	547,340	501,066	550,008	431,491	383,123	366,333	476,674
Spain	1,381,515	1,528,877	982,015	1,094,077	1,258,251	851,222	859,480	813,376	949,359
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	1,774,723
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	1,565,331
The Netherlands	597,640	465,196	482,531	449,350	446,056	355,598	322,323	312,497	372,156
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	1,903,054
Central and Eastern Europe (2) and Turkey	2,551,000	3,340,760	3,515,314	3,149,305	3,656,361	3,369,169	3,416,074	2,474,007	3,421,391
Poland	-	207,007	315,855	354,975	555,598	428,347	446,647	419,749	475,032
Russia	-	1,520,225	1,912,794	1,282,740	1,567,743	1,433,956	1,483,444	629,923	1,049,917
Turkey	456,696	438,597	509,784	725,596	387,256	610,109	561,853	592,660	967,341
AMERICA	-	11,618,929	11,131,614	12,664,453	9,615,025	6,863,586	7,022,914	6,551,141	6,953,212
Canada	849,132	847,436	694,349	712,322	496,846	318,750	320,605	258,483	262,159
United States	8,846,625	7,659,983	5,635,432	7,516,826	4,719,710	3,401,838	3,350,050	2,858,575	3,116,647
Mexico	603,010	714,010	503,748	892,194	763,793	532,433	520,112	486,962	598,091
Argentina	224,950	290,648	522,591	480,952	333,183	232,112	240,671	260,822	274,728
Brazil	1,188,818	1,439,822	2,856,540	2,123,009	2,262,073	1,615,942	1,558,467	1,576,662	1,721,400
ASIA/OCEANIA/MIDDLE EAST	-	15,095,017	27,269,324	36,109,867	36,356,750	33,036,574	35,403,825	38,666,093	42,572,562
Australia	-	789,096	827,407	924,154	799,263	676,804	753,256	777,688	890,823
China	-	3,971,101	13,757,794	21,210,339	21,472,091	20,177,731	21,518,324	23,563,287	26,062,824
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	1,489,363
India	-	1,106,863	2,387,197	2,772,270	2,962,115	2,433,473	3,082,279	3,792,444	4,101,600
Indonesia	-	364,319	541,475	755,566	785,539	388,925	659,809	783,563	779,326
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	3,992,727
Malaysia	-	410,892	543,594	591,275	550,182	480,965	452,663	544,838	604,000
Thailand	-	178,291	346,644	356,063	468,638	343,494	312,200	343,349	406,501
AFRICA	-	784,237	908,357	1,142,250	883,120	665,099	833,233	789,887	747,736
South Africa	-	419,868	337,130	412,670	355,378	246,541	304,340	363,390	347,388
TOTAL	38,689,767	45,404,638	55,809,158	66,327,133	64,803,420	54,742,117	57,276,040	58,644,601	65,272,367

► NEW COMMERCIAL VEHICLE REGISTRATIONS BY COUNTRY (IN UNITS)

	2000	2005	2010	2015	2019	2020	2021	2022	2023
EUROPE	2,889,904	3,156,871	2,308,825	2,625,426	2,981,609	2,537,257	2,866,418	2,442,421	2,900,110
Western Europe (1)	2,310,844	2,376,384	1,712,171	1,962,508	2,371,360	1,920,964	2,105,165	1,767,916	2,020,468
Germany	314,804	295,627	282,157	333,783	409,801	349,081	351,187	312,391	359,689
Belgium	63,304	71,413	60,157	70,458	91,992	78,503	80,688	65,261	78,328
Spain	335,684	430,611	132,104	182,982	242,993	179,570	174,604	145,602	178,509
France	418,038	423,809	420,280	382,158	541,448	449,912	483,279	397,519	434,379
Italy	225,517	251,328	202,573	150,342	215,681	183,003	211,825	188,133	229,324
The Netherlands	100,561	80,787	59,781	71,828	92,683	71,564	80,500	72,701	85,828
United Kingdom	253,372	388,410	262,730	427,903	425,419	333,596	401,824	329,509	360,612
Central and Eastern Europe (2) and Turkey	579,060	780,487	596,654	662,918	610,249	616,293	761,253	674,505	879,642
Poland	-	48,100	50,722	77,464	100,660	81,806	107,972	97,934	101,818
Russia	-	286,400	194,341	158,183	211,098	197,207	258,521	178,681	267,521
Turkey	199,825	276,615	251,129	285,598	104,691	186,041	210,997	238,560	321,337
AMERICA	-	11,719,925	8,588,367	13,023,706	15,774,705	13,953,898	14,980,625	14,325,719	16,294,084
Canada	736,951	782,706	889,039	1,227,195	1,479,594	1,267,724	1,384,245	1,304,482	1,502,357
United States	8,965,048	9,784,346	6,136,787	10,328,798	12,768,444	11,479,518	12,058,515	11,371,749	12,892,621
Mexico	302,944	454,498	344,606	497,280	596,215	445,217	526,620	647,481	815,830
Argentina	81,995	112,042	175,813	163,069	119,018	102,203	129,670	134,740	164,445
Brazil	302,288	274,822	658,524	445,967	525,777	442,495	561,384	527,799	587,289
ASIA/OCEANIA/MIDDLE EAST	-	5,307,718	7,909,760	7,295,772	8,188,353	8,174,681	8,215,050	7,172,852	7,956,001
Australia	-	199,173	208,167	231,254	263,604	240,164	296,575	303,741	325,957
China	-	1,787,088	4,304,142	3,451,263	4,324,840	5,133,338	4,795,939	3,300,458	4,030,874
South Korea	372,840	252,071	273,891	300,116	298,099	287,639	265,708	263,171	260,366
India	-	333,592	653,193	652,566	854,743	505,102	677,119	933,116	978,385
Indonesia	-	169,598	223,235	275,856	244,947	143,152	227,396	264,477	226,476
Japan	1,703,114	1,103,552	752,967	830,621	894,125	788,634	772,642	753,023	786,359
Malaysia	-	140,150	61,562	75,402	54,105	48,469	56,248	62,162	59,000
Thailand	-	514,215	453,713	443,569	538,914	448,652	436,380	506,039	369,279
AFRICA	-	328,780	342,864	435,285	317,171	260,609	300,287	285,501	302,106
South Africa	-	197,538	155,777	205,079	177,520	126,092	146,334	150,788	184,399
TOTAL	18,723,143	20,513,294	19,149,816	23,380,189	27,261,838	24,926,445	26,362,380	24,226,493	27,452,301

(1) Including Iceland from 2015.
(2) Central and Eastern European countries, both EU and non-EU members.
Sources: OICA from 2005, which uses its members' data and therefore local definitions in terms of vehicle type

REGISTRATIONS

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

(IN THOUSANDS OF UNITS AND SHARE IN TOTAL REGISTRATIONS)

	2005 (2)	2010	2015	2019	2020	2021	2022 (1)	2023 (2)
Stellantis	-	-	-	-	-	2,379	2,027	2,098
	-	-	-	-	-	20.2%	18.2%	16.6%
PSA Group (Stellantis from 01/17/2021)	2,111	1,849	1,480	2,467	1,718	-	-	-
	13.6%	13.4%	10.4%	15.6%	14.4%	-	-	-
Renault Group	1,635	1,416	1,350	1,647	1,218	1088	1,050	1,231
	10.5%	10.2%	9.5%	10.4%	10.2%	9.3%	9.5%	9.8%
FCA Group (Stellantis from 01/17/2021)	1,085	1,080	871	939	696	-	-	-
	7.0%	7.8%	6.1%	6.0%	5.8%	-	-	-
Ford Group	1,269	1,128	1,031	993	683	553	539	543
	8.2%	8.2%	7.3%	6.3%	5.7%	4.7%	4.9%	4.3%
General Motors	1,590	1,196	943	3	0	1	2	2
	10.2%	8.6%	6.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Volkswagen Group	3,041	2,984	3,516	3,855	3,036	2935	2,742	3,252
	19.5%	21.6%	24.8%	24.4%	25.4%	25.0%	24.7%	25.8%
Daimler Group	830	676	839	1,030	776	680	659	723
	5.3%	4.9%	5.9%	6.5%	6.5%	5.8%	5.9%	5.7%
BMW Group	772	753	936	1,047	847	858	808	901
	5.0%	5.4%	6.6%	6.6%	7.1%	7.3%	7.3%	7.1%
Nissan	361	407	560	395	288	248	234	288
	2.3%	2.9%	3.9%	2.5%	2.4%	2.1%	2.1%	2.3%
Toyota-Lexus-Daihatsu	852	629	603	796	692	755	789	868
	5.5%	4.5%	4.3%	5.0%	5.8%	6.4%	7.1%	6.9%
Other Japanese brands	911	718	695	819	524	514	401	486
	5.8%	5.2%	4.9%	5.2%	4.4%	4.4%	3.6%	3.9%
Hyundai-Kia	569	614	854	1,061	841	1016	1,036	1,074
	3.7%	4.4%	6.0%	6.7%	7.0%	8.6%	9.3%	8.5%
Tata-JLR Group	0	0	0	0	0	2	132	244
	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	1.9%
Geely-Volvo	249	231	285	341	297	316	296	337
	1.6%	1.7%	2.0%	2.2%	2.5%	2.7%	2.7%	2.7%
Tata-JLR Group	128	100	179	224	161	141	110	133
	0.8%	0.7%	1.3%	1.4%	1.3%	1.2%	1.0%	1.1%
Tesla	0	0	16	111	99	169	230	340
	0.0%	0.0%	0.1%	0.7%	0.8%	1.4%	2.1%	2.7%
Other brands	168	53	31	54	62	100	57	96
	1.1%	0.4%	0.3%	0.3%	0.5%	0.9%	0.5%	0.8%
TOTAL EU + EFTA + UK	15,572	13,832	14,189	15,783	11,940	11,753	11,113	12,616
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Annual variation		-5.0%	9.3%	1.1%	-24.3%	-1.6%	-5.4%	13.5%

► NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY GROUP IN THE EUROPEAN UNION + EFTA + UK (2)

(IN THOUSANDS OF UNITS AND SHARE IN TOTAL REGISTRATIONS)

	2005 (3)	2010	2015	2019	2020	2021	2022 (2)	2023 (2)
Stellantis	-	-	-	-	-	680	503	574
	-	-	-	-	-	33.8%	31.2%	30.7%
PSA Group (Stellantis from 01/17/2021)	389	344	354	557	460	-	-	-
	18.1%	21.9%	19.5%	25.1%	25.3%	-	-	-
Renault Group	331	266	299	362	275	315	236	298
	15.4%	17.0%	16.5%	16.3%	15.1%	15.7%	14.6%	15.9%
FCA Group (Stellantis from 01/17/2021)	284	233	229	203	164	-	-	-
	13.2%	14.9%	12.7%	9.1%	9.0%	-	-	-
Ford Group	235	171	268	351	298	334	286	313
	10.9%	10.9%	14.8%	15.8%	16.4%	16.6%	17.7%	16.7%
General Motors	153	78	104	0.2	0.2	0.2	0.1	0.2
	7.1%	5.0%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Volkswagen Group	212	185	218	271	218	212	163	206
	9.9%	11.8%	12.0%	12.2%	12.0%	10.5%	10.1%	11.0%
Daimler Group	166	140	172	222	199	194	167	176
	7.7%	8.9%	9.5%	10.0%	10.9%	9.6%	10.4%	9.4%
IVECO	-	-	-	64	52	70	64	64
	-	-	-	2.9%	2.9%	3.5%	3.9%	3.4%
Nissan	103	43	50	57	37	45	23	30
	4.8%	2.7%	2.7%	2.6%	2.1%	2.2%	1.4%	1.6%
Toyota-Lexus-Daihatsu	65	39	41	55	56	84	77	99
	3.0%	2.5%	2.3%	2.5%	3.1%	4.2%	4.8%	5.3%
Other Japanese brands	81	38	37	43	29	41	35	37
	3.8%	2.4%	2.0%	1.9%	1.6%	2.0%	2.2%	2.0%
Hyundai-Kia	52	6	4	4	2	2	2	1
	2.4%	0.4%	0.2%	0.2%	0.1%	0.1%	0.1%	0.1%
Other brands	78	27	35	28	28	35	58	76
	3.6%	1.7%	1.9%	1.3%	1.5%	1.7%	3.6%	4.0%
TOTAL EU + EFTA + UK	2,149	1,569	1,813	2,218	1,819	2,011	1,614	1,873
	100.0%	100.0%	100.0%	100.0%	100.0%	100.1%	100.0%	100.0%
Annual variation		8.8%	11.4%	2.8%	-18.0%	10.5%	N/A	16.1%

(1) excluding Bulgaria.
(2) Excluding Bulgaria and Denmark.
(3) Excluding Bulgaria and Denmark and Iceland.

Manufacturer grouping used:
Stellantis = Peugeot + Citroën + DS + Opel/Vauxhall (from 1 August 2017) + Alfa Romeo + Fiat + Lancia + Maserati + Chrysler + Jeep + Dodge + RAM + Abarth.
Renault Group = Renault (incl. Renault Trucks) + Alpine + Dacia + Lada (from 1 January 2017).
Ford Group = Ford Europe + Ford USA + various Fords.
General Motors = Opel/Vauxhall (until 31 July 2017) + Cadillac + Chevrolet + GMC.
Volkswagen Group = Volkswagen + Audi + Cupra + Porsche + Seat + Skoda + Bentley + Lamborghini + MAN + Scania + Quattro.
Daimler = Mercedes-Benz + Smart + Fuso.
Iveco Group: Before 2019, IVECO was part of 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 + Lynk & Co.
Tata Group = Jaguar + Land-Rover.
The scope of the groups corresponds to their situation on 01/01/2024.

REGISTRATIONS

►REGISTRATIONS OF NEW PASSENGER CARS IN THE EUROPEAN UNION + EFTA + UK IN 2023

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

	Total	Stellantis	Renault Group	Volkswagen Group	Ford Group	BMW-Mini	Daimler	Japanese brands	Korean brands	Chinese brands	Tesla
Germany	2,845	335	142	1,103	117	280	297	213	182	25	64
	100.0%	11.8%	5.0%	38.8%	4.1%	9.9%	10.4%	7.5%	6.4%	0.9%	2.2%
Austria	239	20	18	93	9	20	12	25	22	4	8
	100.0%	8.2%	7.6%	39.0%	3.6%	8.4%	5.1%	10.4%	9.0%	1.5%	3.5%
Belgium	477	72	46	114	17	59	35	38	30	6	16
	100.0%	15.2%	9.6%	24.0%	3.6%	12.3%	7.4%	8.0%	6.3%	1.2%	3.4%
Spain	949	170	105	217	31	44	44	118	125	32	13
	100.0%	17.9%	11.1%	22.9%	3.2%	4.6%	4.6%	12.4%	13.2%	3.3%	1.4%
Finland	87	7	2	21	3	5	6	18	9	0	6
	100.0%	7.6%	1.8%	24.3%	3.0%	5.9%	6.5%	20.0%	10.3%	0.3%	7.0%
France	1,775	487	437	244	52	88	54	153	99	1	63
	100.0%	27.4%	24.6%	13.8%	2.9%	4.9%	3.0%	8.6%	5.6%	0.1%	3.6%
Greece	134	39	8	19	5	9	4	26	16	1	2
	100.0%	10.5%	6.2%	14.1%	3.4%	6.3%	3.2%	19.4%	12.1%	0.6%	1.4%
Ireland	122	10	9	34	6	6	3	21	21	2	3
	100.0%	10.5%	7.2%	27.9%	5.0%	4.5%	2.4%	17.0%	17.1%	1.9%	2.8%
Italy	1,567	506	167	263	82	79	57	163	96	56	17
	100.0%	32.3%	10.6%	16.8%	5.2%	5.1%	3.7%	10.4%	6.1%	3.6%	1.1%
Luxembourg	49	7	4	16	1	6	4	2	3	1	2
	100.0%	15.0%	7.2%	31.8%	2.2%	12.3%	8.7%	4.6%	5.6%	1.4%	3.5%
The Netherlands	370	49	27	80	13	26	13	46	52	8	19
	100.0%	13.3%	7.4%	21.7%	3.6%	7.0%	3.5%	12.3%	14.1%	2.2%	5.2%
Portugal	200	46	31	32	6	16	15	15	14	2	9
	100.0%	23.2%	15.5%	16.0%	3.1%	8.0%	7.6%	7.5%	7.1%	0.8%	4.7%
Sweden	290	17	9	75	7	18	15	35	30	11	20
	100.0%	5.9%	3.0%	25.7%	2.3%	6.1%	5.1%	12.2%	10.3%	3.9%	7.0%
European Union (13 countries) (2)	9,104	1,763	1,004	2,311	347	655	560	873	698	148	243
	100.0%	19.4%	11.0%	25.4%	3.8%	7.2%	6.1%	9.6%	7.7%	1.6%	2.7%
Norway	127	6	0	27	4	6	5	21	8	7	25
	100.0%	4.9%	0.4%	21.2%	3.5%	5.0%	4.1%	16.2%	6.2%	5.2%	20.0%
Switzerland	252	23	17	87	10	25	21	29	15	0	9
	100.0%	9.0%	6.6%	34.4%	4.0%	10.0%	8.2%	11.6%	6.1%	0.0%	3.5%
United Kingdom	1,903	219	72	454	144	160	89	211	195	82	50
	100.0%	11.5%	3.8%	23.8%	7.6%	8.4%	4.7%	11.1%	10.2%	4.3%	2.6%
Europe (17 countries) (2)	11,386	2,011	1,092	2,879	506	846	674	1,133	916	237	327
	100.0%	17.7%	9.6%	25.3%	4.4%	7.4%	5.9%	10.0%	8.0%	2.1%	2.9%
Croatia	57	7	10	18	2	2	1	8	6	1	0
	100.0%	11.8%	17.2%	31.8%	3.0%	2.8%	2.4%	14.7%	11.2%	1.8%	0.8%
Estonia	23	2	2	8	0	1	1	6	3	0	0
	100.0%	7.3%	7.2%	34.1%	1.2%	3.0%	3.0%	26.4%	10.9%	0.1%	1.2%
Hungary	108	9	6	25	6	6	5	30	10	2	1
	100.0%	8.6%	5.7%	23.3%	5.5%	5.5%	4.3%	28.1%	9.2%	1.5%	1.2%
Latvia	18	1	1	6	1	1	0	5	2	0	0
	100.0%	5.3%	7.4%	34.4%	3.0%	4.7%	2.1%	25.2%	8.9%	0.0%	0.9%
Lithuania	28	2	2	9	1	1	1	7	3	0	0
	100.0%	6.2%	7.6%	31.5%	3.0%	4.1%	3.3%	24.8%	10.9%	0.0%	0.9%
Poland	475	32	36	130	12	27	21	126	63	0	5
	100.0%	6.7%	7.6%	27.3%	2.6%	5.7%	4.5%	26.5%	13.3%	0.0%	1.0%
Czech Republic	221	11	12	106	6	6	8	27	31	3	1
	100.0%	4.8%	5.3%	47.7%	2.5%	2.9%	3.8%	12.2%	14.2%	1.2%	0.5%
Romania	142	6	56	25	7	5	5	19	12	0	3
	100.0%	4.2%	39.2%	17.4%	4.6%	3.5%	3.3%	13.7%	8.4%	0.0%	2.2%
Slovakia	88	8	6	27	2	3	3	17	18	1	0
	100.0%	9.5%	7.2%	30.7%	2.2%	3.3%	3.7%	19.0%	20.9%	0.7%	0.0%
Slovenia	47	8	6	16	1	2	1	6	5	1	1
	100.0%	15.8%	12.5%	33.7%	2.7%	3.3%	2.9%	11.8%	10.0%	1.8%	2.9%
10 Eastern EU member states (3)	1,208	85	137	369	37	53	47	251	153	7	13
	100.0%	7.0%	11.3%	30.5%	3.1%	4.4%	3.9%	20.8%	12.7%	0.6%	1.1%
EUROPE (27 COUNTRIES) (2) (3) (4)	12,594	2,096	1,229	3,248	543	899	722	1,384	1,069	244	340
	100.0%	16.6%	9.8%	25.8%	4.3%	7.1%	5.7%	11.0%	8.5%	1.9%	2.7%

(1) Respectively 362,412 units for Citroën, 626,472 for Peugeot, 47,892 for DS, 676,818 for Renault on this perimeter.
(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	2023
Germany	3,378,343	2,916,259	3,206,042	3,607,258	2,917,678	2,622,132	2,651,357	2,844,609
Austria	309,427	328,563	308,555	329,363	248,740	239,803	215,050	239,150
Belgium	515,204	547,340	501,066	550,003	431,491	383,123	366,303	476,675
Denmark	112,688	153,583	206,999	225,410	198,162	185,382	148,293	172,798
Spain	1,381,515	982,015	1,034,232	1,258,251	851,210	859,476	813,376	949,359
Finland	134,646	107,346	108,844	114,188	96,430	98,502	81,673	87,502
France	2,133,884	2,251,669	1,917,226	2,214,279	1,650,118	1,659,004	1,529,035	1,774,723
Greece	290,222	141,501	75,804	114,226	80,977	100,911	105,282	134,484
Ireland	230,989	88,445	124,804	117,109	88,324	104,932	105,398	122,310
Iceland	-	-	14,008	11,719	9,369	12,797	16,689	17,541
Italy	2,415,600	1,961,578	1,575,614	1,916,865	1,381,646	1,457,868	1,316,768	1,565,331
Luxembourg	41,896	49,726	46,473	54,923	45,104	44,366	42,094	49,151
Norway	97,376	127,754	150,686	142,381	141,405	176,276	174,329	126,955
The Netherlands	597,640	482,527	448,925	445,217	355,595	322,318	312,075	369,791
Portugal	257,834	223,464	178,503	223,799	145,136	146,637	156,304	199,623
United Kingdom	2,221,670	2,030,846	2,633,503	2,311,140	1,631,064	1,647,181	1,614,063	1,903,054
Sweden	290,529	289,684	345,108	356,036	292,024	301,008	288,088	289,827
Switzerland	316,519	292,453	321,669	311,256	236,703	238,355	224,272	252,215
TOTAL WESTERN EUROPE (17 THEN 18 COUNTRIES) (1)	14,725,982	12,974,753	13,198,061	14,303,423	10,801,176	10,600,071	10,160,449	11,575,098

► REGISTRATIONS OF NEW ELECTRIC PASSENGER CARS BY COUNTRY IN WESTERN EUROPE

(IN UNITS AND SHARE IN TOTAL REGISTRATIONS)

	2017	2018	2019	2020	2021	2022	2023
Germany	24,294	34,360	60,527	188,620	339,847	463,358	511,295
	0.7%	1.0%	1.7%	6.5%	13.0%	17.5%	18.0%
Austria	5,433	6,754	9,242	15,972	33,366	34,165	47,621
	1.5%	2.0%	2.8%	6.4%	13.9%	15.9%	19.9%
Belgium	2,712	3,648	8,830	14,976	22,647	37,581	93,280
	0.5%	0.7%	1.6%	3.5%	5.9%	10.3%	19.6%
Denmark	692	1,524	5,575	8,032	24,998	30,822	62,759
	0.3%	0.7%	2.5%	4.1%	13.5%	20.8%	36.3%
Spain	3,920	6,130	10,048	17,925	23,685	30,524	51,614
	0.3%	0.5%	0.8%	2.1%	2.8%	3.8%	5.4%
Finland	502	776	1,897	4,246	10,150	14,528	29,527
	0.4%	0.6%	1.7%	4.4%	10.3%	17.8%	33.7%
France	24,910	31,059	42,764	110,917	162,106	202,929	298,219
	1.2%	1.4%	1.9%	6.7%	9.8%	13.3%	16.8%
Greece	37	86	190	679	2,176	2,827	6,379
	0.0%	0.1%	0.2%	0.8%	2.2%	2.7%	4.7%
Ireland	622	1,178	3,443	4,000	8,594	15,649	22,744
	0.5%	0.9%	2.9%	4.5%	8.2%	14.8%	18.6%
Iceland	415	687	899	2,281	3,527	5,564	8,781
	1.9%	3.8%	7.7%	24.3%	27.6%	33.3%	50.1%
Italy	2,020	4,998	10,671	32,492	67,267	49,165	66,314
	0.1%	0.3%	0.6%	2.4%	4.6%	3.7%	4.2%
Luxembourg	386	430	984	2,471	4,648	6,391	11,023
	0.7%	0.8%	1.8%	5.5%	10.5%	15.2%	22.4%
Norway	33,025	46,092	60,315	75,333	113,715	138,260	104,587
	20.8%	31.2%	42.4%	53.3%	64.5%	79.3%	82.4%
The Netherlands	7,960	23,985	61,547	72,855	62,649	73,250	113,966
	1.9%	5.4%	13.8%	20.5%	19.4%	23.5%	30.8%
Portugal	1,640	4,073	6,883	7,830	14,276	17,817	36,390
	0.7%	1.8%	3.1%	5.4%	9.7%	11.4%	18.2%
United Kingdom	13,597	15,474	37,782	108,148	190,715	267,196	314,662
	0.5%	0.7%	1.6%	6.6%	11.6%	16.6%	16.5%
Sweden	4,217	7,078	15,595	27,968	57,470	95,035	112,179
	1.1%	2.0%	4.4%	9.6%	19.1%	33.0%	38.7%
Switzerland	4,726	5,161	13,143	19,485	31,806	39,842	52,728
	1.5%	1.7%	4.2%	8.2%	13.3%	17.8%	20.9%
Total Western Europe (17 then 18 countries) (1)	131,108	193,493	350,335	714,230	1,173,642	1,524,903	1,944,068
Share of 100% electric in Europe	44.3%	1.4%	2.4%	6.6%	11.1%	15.0%	16.8%
Annual variation		+47.6%	+81.1%	+103.9%	+64.3%	+29.9%	+27.5%

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

REGISTRATIONS

► REGISTRATIONS OF NEW PASSENGER CARS WITH HYBRID ENGINES (RECHARGEABLE OR NOT) IN WESTERN EUROPE

(IN UNITS AND AS A SHARE OF TOTAL REGISTRATIONS)

	ENERGY	2010	2015	2019	2020	2021	2022	2023
Germany	Hybrid	10,174	32,714	240,697	503,735	683,544	818,391	840,304
		0.3%	1.0%	6.7%	17.3%	26.1%	30.9%	29.5%
	including PHEV	-	-	-	-	-	362,093	175,724
		-	-	-	-	-	13.7%	6.2%
Austria	Hybrid	1,248	3,514	16,540	32,053	56,121	54,126	67,586
		0.4%	1.1%	5.0%	12.9%	23.4%	25.2%	28.3%
	including PHEV	-	-	-	-	-	13,268	16,956
		-	-	-	-	-	6.2%	7.1%
Belgium	Hybrid	4,073	10,711	34,092	70,271	111,230	114,185	137,089
		0.7%	2.1%	6.2%	16.3%	29.0%	31.2%	28.8%
	including PHEV	-	-	-	-	-	59,269	100,308
		-	-	-	-	-	16.2%	21.0%
Denmark	Hybrid	148	2,657	17,330	27,880	49,319	54,696	47,549
		0.1%	1.3%	7.7%	14.1%	26.6%	36.9%	27.5%
	including PHEV	-	-	-	-	-	26,440	17,283
		-	-	-	-	-	17.8%	10.0%
Spain	Hybrid	6,253	20,547	114,531	148,193	273,130	287,460	365,009
		0.6%	2.0%	9.1%	17.4%	31.8%	35.3%	38.4%
	including PHEV	-	-	-	-	-	47,791	62,164
		-	-	-	-	-	5.9%	6.5%
France	Hybrid	9,655	61,619	125,372	243,464	427,477	459,216	595,249
		0.4%	3.2%	5.7%	14.8%	25.8%	30.0%	33.5%
	including PHEV	-	-	-	-	-	126,547	162,950
		-	-	-	-	-	8.3%	9.2%
Italy	Hybrid	4,841	26,262	116,333	253,171	492,675	515,518	634,559
		0.2%	1.7%	6.1%	18.3%	33.8%	39.2%	40.5%
	including PHEV	-	-	-	-	-	64,632	69,008
		-	-	-	-	-	4.9%	4.4%
Norway	Hybrid	3,144	15,704	37,869	45,326	52,209	24,321	17,754
		2.5%	10.4%	26.6%	32.1%	29.6%	14.0%	14.0%
	including PHEV	-	-	-	-	-	16,121	10,170
		-	-	-	-	-	9.2%	8.0%
The Netherlands	Hybrid	16,099	56,261	36,928	65,838	103,550	112,395	137,152
		3.3%	12.5%	8.3%	18.5%	32.1%	36.0%	37.1%
	including PHEV	-	-	-	-	-	34,742	47,082
		-	-	-	-	-	11.1%	12.7%
United Kingdom	Hybrid	22,148	64,692	265,306	312,141	460,272	581,406	742,382
		1.1%	2.5%	11.5%	19.1%	27.9%	36.0%	39.0%
	including PHEV	-	-	-	-	-	101,414	141,311
		-	-	-	-	-	6.3%	7.4%
Sweden	Hybrid	3,628	14,478	57,870	105,725	131,412	125,204	84,599
		1.3%	4.2%	16.3%	36.2%	43.7%	43.5%	29.2%
	including PHEV	-	-	-	-	-	66,614	61,024
		-	-	-	-	-	23.1%	21.1%
Switzerland	Hybrid	4,210	8,400	26,990	44,875	74,960	73,956	92,050
		1.4%	2.6%	8.7%	19.0%	31.4%	33.0%	36.5%
	including PHEV	-	-	-	-	-	18,355	23,220
		-	-	-	-	-	8.2%	9.2%
TOTAL WESTERN EUROPE (17 THEN 18 COUNTRIES) (1)	Hybrid	90,198	333,028	1,151,196	1,944,146	3,068,616	3,384,704	3,962,479
		0.7%	2.5%	8.0%	18.0%	28.9%	33.3%	34.2%
	including PHEV	-	-	-	-	-	986,580	958,201
		-	-	-	-	-	9.7%	8.3%

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

REGISTRATIONS

The special series Temporary Transit of France was incorporated into the registrations of new passenger cars from 2004.

► NEW PASSENGER CAR REGISTRATIONS BY GROUP IN WESTERN EUROPE

(IN THOUSANDS OF UNITS AND SHARE IN TOTAL REGISTRATIONS)

	2000	2010	2015	2019	2020	2021	2022	2023
Stellantis	-	-	-	-	-	2,238	1,923	2,012
	-	-	-	-	-	21.1%	19.2%	17.6%
PSA Group	1,930	1,776	1,423	2,302	1,617	-	-	-
	13.1%	13.7%	10.8%	16.1%	15.0%	-	-	-
Renault Group	1,559	1,305	1,230	1,436	1,063	962	924	1,094
	10.6%	10.1%	9.3%	10.0%	9.8%	9.1%	9.2%	9.6%
FCA Group (Stellantis from 01/17/2021)	1,575	1,035	841	877	638	-	-	-
	10.7%	8.0%	6.4%	6.1%	5.9%	-	-	-
Ford Group	1,248	1,063	966	917	635	504	493	506
	8.5%	8.2%	7.3%	6.4%	5.9%	4.8%	4.9%	4.4%
General Motors	1,720	1,119	878	3	0	1	2	2
	11.7%	8.6%	6.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Volkswagen Group	2,776	2,757	3,202	3,437	2,701	2,615	2,441	2,883
	18.8%	21.3%	24.3%	24.0%	25.0%	24.7%	24.3%	25.3%
Daimler Group	811	662	815	984	735	636	614	675
	5.5%	5.1%	6.2%	6.9%	6.8%	6.0%	6.1%	5.9%
BMW Group	499	735	906	1,001	807	810	760	848
	3.4%	5.7%	6.9%	7.0%	7.5%	7.6%	7.6%	7.4%
Nissan	392	384	524	364	266	228	219	272
	2.7%	3.0%	4.0%	2.5%	2.5%	2.2%	2.2%	2.4%
Toyota-Lexus-Daihatsu	576	582	539	673	574	618	643	690
	3.9%	4.5%	4.1%	4.7%	5.3%	5.8%	6.4%	6.0%
Other Japanese brands	701	651	624	697	453	437	343	417
	4.8%	5.0%	4.7%	4.9%	4.2%	4.1%	3.4%	3.7%
Hyundai-Kia	303	539	760	919	727	864	886	922
	2.1%	4.2%	5.8%	6.4%	6.7%	8.2%	8.8%	8.1%
Chinese brand groups	-	-	-	-	-	2	131	238
	-	-	-	-	-	0.0%	1.3%	2.1%
Geely-Volvo	230	222	274	321	279	296	276	314
	1.6%	1.7%	2.1%	2.2%	2.6%	2.8%	2.8%	2.8%
Groupe Tata-JLR	112	97	174	216	155	136	105	128
	0.8%	0.7%	1.3%	1.5%	1.4%	1.3%	1.0%	1.1%
Tesla	-	0	16	111	98	167	226	328
	-	0.0%	0.1%	0.8%	0.9%	1.6%	2.3%	2.9%
Other brands (including MG-Rover, Saab)	304	50	50	45	52	93	45	83
	2.1%	0.4%	0.3%	0.3%	0.5%	0.9%	0.4%	0.7%
TOTAL WESTERN EUROPE (1)	14,738	12,975	13,198	14,303	10,801	10,600	10,031	11,413
Annual variation	-2.1%	-5.0%	9.1%	0.7%	-24.5%	-1.9%	N/A (2)	13.8%

(1) Including Iceland from 2015. Excluding Denmark from 2022.

► NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY GROUP IN WESTERN EUROPE

(IN THOUSANDS OF UNITS AND SHARE IN TOTAL REGISTRATIONS)

	2000	2010	2015	2019	2020	2021	2022	2023
Stellantis	-	-	-	-	-	624	465	534
	-	-	-	-	-	34%	31.7%	31.2%
PSA Group	349	326	329	521	430	-	-	-
	18.1%	22.1%	19.6%	25.5%	25.7%	-	-	-
Renault Group	272	251	274	328	249	277	207	265
	14.1%	17.0%	16.3%	16.1%	14.9%	15.0%	14.1%	15.5%
FCA Group (Stellantis from 01/17/2021)	275	214	201	178	147	-	-	-
	14.2%	14.5%	12.0%	8.7%	8.8%	-	-	-
Ford Group	180	161	251	326	275	308	262	288
	9.3%	10.9%	15.0%	16.0%	16.4%	16.7%	17.8%	16.8%
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	250	202	198	153	190
	10.5%	11.6%	12.1%	12.2%	12.1%	10.7%	10.4%	11.1%
Daimler Group	178	133	164	209	186	182	157	165
	9.2%	9.0%	9.8%	10.2%	11.1%	9.9%	10.7%	9.6%
IVECO (1)	-	-	-	55	46	59	52	54
	-	-	-	2.7%	2.7%	3.2%	3.6%	3.2%
Nissan	100	41	48	55	36	44	22	29
	5.2%	2.8%	2.9%	2.7%	2.2%	2.4%	1.5%	1.7%
Toyota-Lexus-Daihatsu	69	37	38	48	48	72	66	82
	3.6%	2.5%	2.3%	2.4%	2.9%	3.9%	4.5%	4.8%
Other Japanese brands	102	36	35	37	23	37	30	33
	5.3%	2.4%	2.1%	1.8%	1.4%	2.0%	2.1%	1.9%
Hyundai-Kia	44	5	4	3	2	2	1	1
	2.3%	0.4%	0.2%	0.2%	0.1%	0.1%	0.1%	0.1%
Other brands	69	26	34	30	31	38	53	70
	3.6%	1.8%	2.0%	1.5%	1.8%	2.0%	3.6%	4.1%
TOTAL WESTERN EUROPE (2)	1,931	1,475	1,674	2,041	1,676	1,839	1,470	1,711
Annual variation	5.6%	11.1%	11.2%	2.9%	-17.9%	9.7%	N/A (3)	16.4%

(1) Before 2019, IVECO was included in the FCA Group

(2) Including Iceland from 2015. Excluding Denmark from 2022.

(3) Annual variation N/A because not comparable.
The scope of the groups corresponds to their situation on 01/01/2022 (read page 74).

REGISTRATIONS

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

(IN THOUSANDS OF UNITS AND SHARE IN TOTAL REGISTRATIONS)

	2005	2010	2015	2019	2020	2021	2022	2023
Stellantis	-	-	-	-	-	140	103	85
	-	-	-	-	-	12.2%	9.5%	7.0%
PSA Group (Stellantis from 01/17/2021)	99	73	57	165	102	-	-	-
	9.5%	8.5%	5.7%	11.2%	8.9%	-	-	-
Renault Group	193	112	120	211	155	126	126	137
	18.7%	13.0%	12.1%	14.2%	13.6%	10.9%	11.6%	11.3%
FCA Group (Stellantis from 01/17/2021)	50	45	30	65	59	-	-	-
	4.8%	5.3%	3.0%	4.4%	5.2%	-	-	-
Ford Group	59	65	65	77	48	50	46	37
	5.7%	7.5%	6.6%	5.2%	4.3%	4.3%	4.3%	3.1%
General Motors	132	76	64	0	0	0	0	0
	12.7%	8.9%	6.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Volkswagen Group	257	226	314	422	338	320	302	369
	24.8%	26.4%	31.7%	28.5%	29.7%	27.8%	27.9%	30.5%
Daimler Group	11	13	24	46	41	44	45	47
	1.1%	1.6%	2.5%	3.1%	3.6%	3.8%	4.1%	3.9%
BMW Group	11	17	30	46	40	48	48	53
	1.0%	2.0%	3.0%	3.1%	3.5%	4.2%	4.4%	4.4%
Nissan	19	23	36	30	22	20	14	16
	1.8%	2.6%	3.6%	2.0%	1.9%	1.7%	1.3%	1.3%
Toyota-Lexus-Daihatsu	60	47	65	122	118	140	146	179
	5.8%	5.5%	6.5%	8.3%	10.3%	12.1%	13.5%	14.8%
Other Japanese brands	91	67	71	122	71	77	58	70
	8.7%	7.9%	7.2%	8.2%	6.3%	6.7%	5.4%	5.8%
Hyundai-Kia	39	75	95	141	114	152	150	153
	3.8%	8.7%	9.5%	9.6%	10.0%	13.2%	13.9%	12.7%
Geely-Volvo	7	9	12	20	19	20	20	23
	0.6%	1.1%	1.2%	1.3%	1.6%	1.7%	1.8%	1.9%
Groupe Tata-JLR	2	3	4	8	5	5	5	5
	0.2%	0.3%	0.5%	0.5%	0.5%	0.5%	0.5%	0.4%
Tesla	-	0	0	0	0	2	3	13
	-	0.3%	0.0%	0.0%	0.0%	0.2%	0.3%	1.1%
Other brands (including MG-Rover, Saab)	7	6	3	5	6	9	15	22
	0.7%	0.7%	0.3%	0.3%	0.5%	0.8%	1.4%	1.8%
TOTAL CEE COUNTRIES MEMBERS OF THE EU (1)	1,035	857	991	1,479	1,139	1,153	1,082	1,208
Annual variation	-	-4.8%	12.0%	5.9%	-23.0%	1.2%	N/A	11.7%

► REGISTRATIONS OF NEW LIGHT COMMERCIAL VEHICLES IN CENTRAL AND EASTERN EUROPEAN COUNTRIES MEMBER OF THE EU (IN THOUSANDS OF UNITS AND SHARE IN TOTAL REGISTRATIONS)

	2005	2010	2015	2019	2020	2021	2022	2023
Stellantis	-	-	-	-	-	51	31	31
	-	-	-	-	-	29.9%	25.7%	23.7%
PSA Group (Stellantis from 01/17/2021)	20	18	26	36	30	-	-	-
	13.6%	19.5%	18.4%	20.5%	20.7%	-	-	-
Renault Group	35	15	26	34	26	39	24	27
	24.4%	16.3%	18.4%	19.0%	18.2%	22.5%	19.7%	20.5%
FCA Group (Stellantis from 01/17/2021)	21	19	28	24	18	-	-	-
	14.7%	19.8%	20.4%	13.8%	12.3%	-	-	-
Ford Group	14	10	18	25	22	26	21	21
	9.8%	10.1%	12.8%	13.8%	15.7%	15.1%	17.4%	16.1%
General Motors	8	3	8	0	0	0	0	0
	5.2%	3.2%	5.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Volkswagen Group	21	14	16	21	16	13	9	13
	14.7%	14.9%	11.6%	12.1%	11.1%	7.6%	7.5%	9.6%
Daimler Group	10	7	9	14	13	12	11	11
	6.8%	7.9%	6.4%	7.7%	8.8%	7.0%	9.1%	8.4%
IVECO (2)	-	-	-	9	7	11	10	8
	-	-	-	5.3%	4.8%	6.3%	8.3%	6.2%
Nissan	2	2	2	2	1	1	0	0
	1.4%	2.5%	1.2%	1.3%	0.7%	0.8%	0.3%	0.2%
Toyota	2	2	3	7	8	13	10	15
	1.6%	2.2%	2.2%	4.1%	5.7%	7.3%	8.0%	11.0%
Other Japanese brands	3	2	2	3	2	4	3	3
	2.3%	2.1%	1.7%	1.7%	1.4%	2.0%	2.5%	2.0%
Hyundai-Kia	5	1	1	0	0	0	0	0
	3.2%	0.7%	0.4%	0.2%	0.0%	0.0%	0.0%	0.0%
Other brands (including MG-Rover, Saab)	4	1	1	1	1	3	2	3
	2.5%	0.8%	0.8%	0.6%	0.5%	1.5%	0.0%	2.2%
TOTAL CEE COUNTRIES MEMBERS OF THE EU (1) (3)	145	95	139	177	143	172	121	133
Annual variation	-	-17.5%	17.5%	2.0%	-19.2%	20.1%	N/A	10.0%

(1) Excluding Bulgaria in 2005 and from 2022 (annual variation is N/A because scope is not comparable).
(2) Before 2019, IVECO was included in the FCA group.
(3) Excluding the Czech Republic from 2022.
The scope of the groups corresponds to their situation on 01/01/2024 (see page 74).
Source: CCFA

REGISTRATIONS

► REGISTRATIONS OF NEW LIGHT COMMERCIAL VEHICLES (UP TO 5 TONNES) BY COUNTRY (IN UNITS)

	2000	2005	2010	2015	2019	2021	2022 (1)	2023 (1)
Germany	212,290	202,372	202,446	243,305	309,963	270,466	231,290	259,376
Austria	27,243	28,878	28,130	33,013	43,578	58,956	24,651	30,573
Belgium	54,090	62,672	56,006	65,179	86,672	79,008	56,102	67,549
Denmark	33,092	58,076	16,848	33,177	34,529	31,558	27,144	25,681
Spain	299,246	387,203	116,770	155,400	215,784	152,335	119,784	146,142
Finland	15,056	16,211	11,550	11,986	15,611	13,774	11,191	11,021
France	414,966	420,065	417,612	379,428	479,784	432,631	347,069	378,040
Greece	23,008	23,374	10,935	5,756	8,144	10,570	9,664	10,144
Ireland	41,474	37,073	10,486	23,837	25,330	28,762	23,510	28,943
Iceland	-	-	-	1362	1,451	1,207	1,607	1,971
Italy	225,517	207,067	177,887	134,265	189,245	185,300	159,426	195,618
Luxembourg	3,083	3,064	3,291	4,016	5,308	5,060	4,004	5,410
Norway	31,627	37,021	30,422	34,394	39,313	35,479	29,481	29,574
The Netherlands	96,570	66,232	49,863	57,921	76,458	68,690	59,173	69,297
Portugal	152,836	66,774	45,756	30,996	38,546	28,847	23,637	28,523
United Kingdom	245,163	330,436	231,539	380,996	376,386	362,358	283,836	343,361
Sweden	31,854	35,098	38,543	45,124	54,127	36,404	34,516	43,713
Switzerland	24,121	22,428	26,507	34,297	40,659	37,571	25,170	30,570
TOTAL WESTERN EUROPE (17 THEN 18 COUNTRIES)	1,931,236	2,004,044	1,474,591	1,674,452	2,040,888	1,838,976	1,471,255	1,705,506

► REGISTRATIONS OF NEW INDUSTRIAL VEHICLES (OVER 5 TONNES) BY COUNTRY, EXCLUDING COACHES AND BUSES (IN UNITS)

	2000	2005	2010	2015	2019	2021 (2)	2022 (2)	2023 (2)
Germany	96,830	88,364	75,014	85,002	93,714	78,981	76,218	94,820
Austria	8,508	8,235	5,138	7,151	7,946	6,680	7,079	8,008
Belgium	11,061	11,657	7,133	8,188	11,518	8,181	8,566	10,058
Denmark	4,597	5,902	2,682	4,687	4,951	4,384	4,872	4,973
Spain	33,700	39,753	13,215	22,043	24,019	20,805	23,462	28,685
Finland	3,072	3,492	2,368	2,400	3,237	3,536	3,339	3,942
France	57,918	55,281	34,221	41,714	55,215	45,030	44,567	49,613
Greece	1,633	1,589	1,081	439	402	568	676	726
Ireland	4,666	4,621	1,011	1,867	2,223	2,271	2,203	2,654
Iceland	-	-	-	183	273	275	287	423
Italy	38,388	35,313	17,532	15,020	23,413	24,762	25,688	28,628
Luxembourg	1,451	1,394	803	1,089	1,290	1,054	1,425	1,832
Norway	3,564	4,952	3,126	4,366	6,117	6,035	5,603	6,490
The Netherlands	16,835	13,405	9,390	13,546	15,192	11,742	13,291	16,139
Portugal	7,403	4,588	3,116	3,956	4,920	4,264	4,707	6,922
United Kingdom	51,864	53,344	27,988	44,364	48,535	42,825	45,859	53,271
Sweden	5,549	5,688	4,605	5,289	7,165	5,910	6,024	7,184
Switzerland	4,733	3,817	3,388	4,079	4,405	3,565	3,716	4,482
TOTAL WESTERN EUROPE (17 THEN 18 COUNTRIES)	351,772	341,395	211,811	265,383	314,535	270,868	277,582	328,850

► REGISTRATIONS OF NEW COACHES AND BUSES (OVER 5 TONNES) BY COUNTRY (IN UNITS)

	2000	2005	2010	2015	2019	2021 (2)	2022 (2)	2023 (2)
Germany	5,684	4,891	4,697	5,476	6,124	6,474	4,883	5,493
Austria	706	565	733	878	1,146	887	928	1,165
Belgium	974	754	909	778	1,250	945	590	732
Denmark	419	315	450	269	184	636	667	499
Spain	2,738	3,655	2,119	2,537	3,147	1,877	2,356	3,679
Finland	0	252	300	330	518	382	417	249
France	4,320	4,776	5,382	6,724	6,417	6,857	5,883	6,125
Greece	374	575	325	44	202	454	255	252
Ireland	121	271	47	313	442	444	287	340
Iceland	-	-	-	34	48	30	35	138
Italy	4,152	4,514	3,931	2,163	3,988	3,469	3,277	5,119
Luxembourg	108	147	173	247	263	167	301	247
Norway	427	708	1,052	660	2,013	1,083	591	1,024
The Netherlands	949	1,134	524	332	910	338	237	392
Portugal	806	620	418	199	567	586	1,484	984
United Kingdom	4,496	4,630	3,203	3,931	3,100	4,136	4,253	5,513
Sweden	1,071	1,021	1,302	1,172	1,150	728	1,241	1,118
Switzerland	491	457	476	689	568	646	471	676
TOTAL WESTERN EUROPE (17 THEN 18 COUNTRIES)	27,836	29,285	26,041	26,776	32,037	30,139	28,156	33,745

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

REGISTRATIONS

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

	2000	2005	2010	2015	2019	2021	2022	2023
Bulgaria	-	-	15,646	24,256	39,419	24,631	28,680	37,724
Croatia	62,009	70,541	38,587	35,715	62,938	45,289	43,928	57,694
Estonia	10,600	19,640	10,295	21,033	27,585	22,608	20,426	22,820
Hungary	133,233	198,982	43,476	77,171	157,906	121,920	111,524	107,720
Latvia	7,300	16,602	6,365	13,766	18,233	14,366	16,824	19,083
Lithuania	6,158	10,467	7,970	17,071	46,388	31,454	25,496	27,528
Poland	478,752	235,522	333,490	352,378	553,942	446,443	419,749	475,032
Czech Republic	148,592	151,699	169,580	230,857	249,915	206,876	192,084	221,419
Romania	64,432	215,554	106,333	81,162	161,562	121,208	129,328	144,611
Slovakia	55,090	57,125	64,033	77,979	101,568	75,696	78,841	88,003
Slovenia	67,665	59,324	61,142	59,664	59,862	42,071	46,339	48,809
TOTAL (1)	907,400	749,361	818,330	991,052	1,479,318	1,152,562	1,113,219	1,250,443

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

	2000	2005	2010	2015	2019	2021	2022 (2)	2023 (2)
Bulgaria	-	-	3,211	4,875	5,985	6,659	4,885	5,192
Croatia	3,360	7,671	2,845	6,909	9,143	8,131	5,630	7,463
Estonia	1,500	2,944	1,406	3,962	4,487	4,225	3,710	3,904
Hungary	26,686	20,479	9,337	17,719	26,410	23,170	17,652	20,749
Latvia	900	1,753	649	2,473	2,783	2,625	2,406	2,699
Lithuania	1,270	3,371	1,044	2,533	4,606	3,471	3,321	3,104
Poland	33,653	35,985	42,852	55,207	68,010	70,899	62,236	64,522
Czech Republic	14,786	16,024	11,318	17,595	20,612	19,672	16,899	22,769
Romania	14,789	35,842	10,404	13,471	19,122	17,178	14,826	17,212
Slovakia	5,812	14,428	6,953	7,321	8,534	8,275	7,679	9,107
Slovenia	6,274	6,897	4,744	6,686	8,653	7,490	7,132	7,685
TOTAL (1)	90,900	101,881	91,918	138,751	178,345	171,795	146,376	164,406

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

	2000	2005	2010	2015	2019	2021	2022	2023
Bulgaria	-	-	18,857	29,131	45,404	31,290	33,565	42,916
Croatia	65,369	78,212	41,432	42,624	72,081	53,420	49,558	65,157
Estonia	12,100	22,584	11,701	24,995	32,072	26,833	24,136	26,724
Hungary	159,919	219,461	52,813	94,890	184,316	145,090	129,176	128,469
Latvia	8,200	18,355	7,014	16,239	21,016	16,991	19,230	21,782
Lithuania	7,428	13,838	9,014	19,604	50,994	34,925	28,817	30,632
Poland	512,405	271,507	376,342	407,585	621,952	517,342	481,985	539,554
Czech Republic	163,378	167,723	180,898	248,452	270,527	226,548	208,983	244,188
Romania	79,221	251,396	116,737	94,633	180,684	138,386	144,154	161,823
Slovakia	60,902	71,553	70,986	85,300	110,102	83,971	86,520	97,110
Slovenia	73,939	66,221	65,886	66,350	68,515	49,561	53,471	56,494
TOTAL (1)	998,300	851,242	910,248	1,129,803	1,657,663	1,324,357	1,259,595	1,414,849

► REGISTRATIONS OF COMMERCIAL VEHICLES OVER 5 TONNES (INCLUDING COACHES AND BUSES) IN THE EU MEMBER STATES OF CENTRAL AND EASTERN EUROPE (IN UNITS)

	2000	2005	2010	2015	2019	2021 (3)	2022 (3)	2023 (3)
Bulgaria (2)	-	-	1,000	1,500	3,621	3,276	3,917	-
Croatia	612	1,463	599	1,044	1,741	1,403	1,744	2,156
Estonia	400	927	502	934	1,207	1,041	1,243	1,020
Hungary	2,900	4,400	2,408	6,045	5,776	5,486	6,395	7,179
Latvia	1,000	1,284	520	1,372	1,169	1,573	1,934	2,001
Lithuania	1,000	2,297	1,355	3,633	7,688	8,121	10,049	10,932
Poland	7,464	11,079	11,611	23,226	28,758	34,046	35,698	37,296
Czech Republic	6,400	8,200	5,750	12,416	10,889	9,685	10,186	11,488
Romania	3,113	5,019	2,686	6,485	7,740	7,104	7,406	9,089
Slovakia	1,796	3,754	2,870	4,637	3,691	3,397	3,554	4,732
Slovenia	1,876	1,635	985	2,025	2,456	2,023	2,431	2,657
TOTAL (1)	22,800	33,500	29,700	63,317	73,315	77,155	84,557	88,550

(1) New Member States: 8 countries in 2000, 10 countries from 2006 to 2012, 11 countries from 2013.
(2) The scope is limited to less than 3.5 t.
(3) The scope is extended to more than 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	2021	2022	2023
Citroën	1,168,470	1,379,082	1,452,847	1,153,855	980,758	745,029	743,439	740,800
DS	-	-	-	103,342	62,601	46,759	61,427	56,965
Peugeot	1,708,968	1,996,284	2,152,331	1,702,393	1,455,444	1,145,276	1,104,977	1,167,541
Opel	-	-	-	-	920,314	606,960	616,010	703,419
Others (Fiat, Toyota)	-	-	-	22,191	17,092	61,487	101,046	179,540
Stellantis excluding FCA (PSA before 2021) (1)	2,877,438	3,375,366	3,605,178	2,981,781	3,436,209	2,605,511	2,626,899	2,848,265
Renault	2,356,616	2,326,359	2,099,027	2,255,701	2,610,246	1,616,750	1,632,655	1,705,734
Alpine	-	-	-	-	4,244	3,005	3,782	4,708
Dacia	55,183	172,021	341,090	570,533	696,018	529,045	626,392	657,156
Renault Korea Motors	14,517	118,438	276,169	206,418	143,143	112,964	52,110	20,620
Lada (until April 2022)	-	-	-	-	407,963	360,668	71,149	0
Others (Mobilize, Nissan, Mercedes, Mitsubishi)	-	-	-	-	-	35,788	39,630	3,253
Renault Group	2,426,316	2,616,818	2,716,286	3,032,652	3,861,614	2,658,220	2,425,718	2,391,471
TOTAL (2)	5,303,754	5,992,184	6,321,464	6,014,433	7,271,006	5,243,147	5,052,617	5,239,736

► LIGHT VEHICLE PRODUCTION IN FRANCE (IN UNITS)

	2000	2005	2010	2015	2019	2021	2022	2023
Total Passenger cars	2,879,810	3,112,961	1,924,131	1,563,184	1,661,448	918,823	1,010,463	1,023,292
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	690,105	737,544	735,042
Including Smart and Ineos (from 2023)	101,365	77,015	97,373	93,357	62,961	26,718	16,983	16,505
Including Toyota	0	180,643	158,512	228,033	223,024	202,000	255,936	271,745
Total Light commercial vehicles	409,966	382,201	262,479	414,676	509,563	433,407	372,707	476,868
Including Stellantis excluding FCA (PSA before 2021) and Renault Group	370,538	361,521	243,029	414,676	509,563	433,407	372,707	476,868
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	1,352,230	1,383,170	1,500,160
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	1,123,512	1,110,251	1,211,910

► PRODUCTION OF HEAVY VEHICLES IN FRANCE (N UNITS)

	2000	2005	2010	2015 (3)	2019	2021	2022	2023
Renault Trucks (3)	87,719	54,501	31,874	31,598	35,950	33,422	39,133	40,833
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

► INVOICING (DELIVERIES) OF INDUSTRIAL VEHICLES BY RENAULT TRUCKS (IN UNITS)

	2000	2005	2010	2015	2019	2021	2022	2023
Total	-	-	-	46,973	54,098	51,460	58,967	69,859
16 t and more	-	-	-	26,111	30,002	27,475	32,781	33,748
7 to < 16 t	-	-	-	5,487	5,948	5,947	6,352	7,085
< 7 t	-	-	-	15,375	18,148	18,038	19,834	29,026

► RENAULT TRUCKS VEHICLE RANGE

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

(1) The FCA group and the PSA group merged on 01/17/2021 to create the Stellantis group. The FCA group, a member of Stellantis, produced 3 million vehicles in 2023.
(2) Excluding double counting. See page 84.
(3) In 2001, Renault's heavy-duty activities were grouped 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

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

► PRODUCTION OF PASSENGER CARS BY BRAND (IN UNITS)

	2000	2005	2010	2015	2019	2021	2022	2023
Citroën	976,232	1,173,706	1,272,385	967,886	788,127	561,448	580,114	566,836
DS	-	-	-	103,342	62,601	46,759	61,427	56,965
Peugeot	1,522,051	1,808,984	1,942,079	1,494,318	1,213,885	925,656	921,678	960,106
Opel	-	-	-	-	804,805	498,910	520,566	582,393
Others (Fiat, Toyota, Lancia)	-	-	-	-	-	26,355	29,580	42,272
Stellantis excluding FCA (PSA before 2021) (1)	2,498,283	2,982,690	3,214,464	2,565,546	2,869,418	2,059,128	2,113,365	2,208,572
Renault	2,043,815	1,924,574	1,796,321	1,868,031	2,152,285	1,202,439	1,255,366	1,229,042
Alpine	-	-	-	-	4,244	3,005	3,782	4,708
Dacia	42,603	152,150	323,386	542,325	668,584	511,817	626,392	657,156
Renault Korea Motors	14,517	118,438	276,169	206,418	143,143	112,964	52,110	20,620
Lada	-	-	-	-	407,963	360,668	71,149	0
Others (Mobilize, Nissan, Mercedes)	-	-	-	-	-	35,788	39,630	3,253
Renault Group	2,100,935	2,195,162	2,395,876	2,616,774	3,376,219	2,226,681	2,048,429	1,914,779
TOTAL	4,599,218	5,177,852	5,610,340	5,182,320	6,245,637	4,285,809	4,161,794	4,123,351
of which production in France	2,765,803	2,803,891	1,665,797	1,241,794	1,375,463	690,105	737,544	735,042
Citroën	504,323	605,988	468,398	204,040	119,364	63,071	76,268	76,038
DS	-	-	-	80,980	62,282	41,419	38,202	34,574
Peugeot	1,094,756	1,155,292	722,214	607,150	804,101	297,190	337,141	362,680
Opel	-	-	-	-	85,841	120,057	124,015	144,863
Others	-	-	-	-	-	13,014	13,640	15,444
Stellantis excluding FCA (PSA before 2021)	1,599,079	1,761,280	1,190,612	892,170	1,071,588	534,751	589,266	633,599
Renault	1,166,724	1,042,611	475,185	349,624	299,631	116,561	106,404	93,531
Alpine	-	-	-	-	4,244	3,005	3,782	4,708
Others	-	-	-	-	-	35,788	38,092	3,204
Renault Group	1,166,724	1,042,611	475,185	349,624	303,875	155,354	148,278	101,443

(1) Read the notes on page 82.

► GLOBAL PRODUCTION OF STELLANTIS (EXCLUDING FCA) AND THE RENAULT GROUP (IN UNITS)

Brands/Models	World production	Production in France	Production outside France
STELLANTIS (excluding FCA)	2,208,572	633,599	1,574,973
Citroën	566,836	76,038	490,798
C3	227,131	0	227,131
C3 Aircross	73,925	0	73,925
C3-XR, C-Elysée	11,211	0	11,211
C4, C4 Cactus, C4 X	115,333	0	115,333
C5 X, C5 Aircross	90,813	67,736	23,077
C6	2,079	0	2,079
Berlingo	37,937	0	37,937
Spacetourer	8,302	8,302	0
Miscellaneous	105	0	105
DS	56,965	34,574	22,391
DS3 Crossback	10,272	10,272	0
DS4	21,463	0	21,463
DS7 Crossback	24,410	24,302	108
DS9	820	0	820
Peugeot	960,106	362,680	597,426
208	304,706	0	304,706
2008	217,166	0	217,166
301	3,422	0	3,422
308	115,259	115,259	0
3008	135,995	134,028	1,967
4008	2,945	0	2,945
408	65,210	40,114	25,096
5008	56,152	53,402	2,750
508	18,811	14,220	4,591
Rifter / Partner	34,567	0	34,567
Traveller	5,738	5,657	81
Miscellaneous	135	0	135
Opel	582,393	144,863	437,530
Astra	77,843	0	77,843
Combo	14,738	0	14,738
Corsa	223,393	0	223,393
Crossland	59,775	0	59,775
Grandland	61,320	0	61,320
Insignia	385	0	385
Mokka	135,502	135,502	0
Zafira Life	9,369	9,361	8
Miscellaneous	68	0	68

Brands/Models	World production	Production in France	Production outside France
Autres	42,272	15,444	26,828
FIAT	9,311	1,662	7,649
Lancia	98	0	98
Toyota	32,863	13,782	19,081
RENAULT GROUP	1,914,779	101,443	1,813,336
Renault	1,229,042	93,531	1,135,511
Austral	84,354	0	84,354
Twingo	34,170	0	34,170
Clio	310,751	0	310,751
Kwid	112,203	0	112,203
Kardian	117	0	117
Kiger	23,070	0	23,070
Captur	173,070	0	173,070
Zoé	16,679	16,679	0
Logan / Sandero	69,155	0	69,155
Rafale	165	0	165
Duster	81,455	0	81,455
Megane	122,805	50,729	72,076
Express	24,716	0	24,716
Koleos	12,484	0	12,484
Espace	15,004	705	14,299
Arkana / XM3	67,027	0	67,027
Triber	26,781	0	26,781
Kangoo	25,257	25,257	0
Divers	29,779	161	29,618
Alpine	4,708	4,708	0
Mobilize (Limo)	49	0	49
Dacia	657,156	0	657,156
Logan / Sandero	301,924	0	301,924
Spring	54,052	0	54,052
Duster	199,628	0	199,628
Jogger	97,895	0	97,895
Lodgy	3,657	0	3,657
Renault Korea Motors	20,620	0	20,620
Koleos	10,873	0	10,873
Talisman / SM6	1,752	0	1,752
Arkana / XM3	7,995	0	7,995
Autres (Trafic Nissan)	3,204	3,204	0
TOTAL	4,123,351	735,042	3,388,309

NB: Renault also produced 372 Twizys in its factories in Valladolid (Spain) and Busan (South Korea).
Stellantis produced in Kenitra, Morocco: 25,484 Citroën Ami, 4,888 Opel Rocks-E and 1,753 Fiat Topolino in 2023.
Source: CCFA

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

► PRODUCTION OF LIGHT COMMERCIAL VEHICLES (UP TO 5 TONNES) BY BRAND (IN UNITS)

	2000	2005	2010	2015	2019	2021	2022	2023
Citroën	192,238	205,376	180,462	185,969	192,631	183,581	163,325	173,964
Peugeot	186,917	187,300	210,252	208,075	241,559	219,620	183,299	207,435
Opel	-	-	-	-	115,509	108,050	95,444	121,026
Others (Fiat, Toyota)	-	-	-	22,191	17,092	35,132	71,466	137,268
Stellantis (excluding FCA) (PSA before 2021) (1)	379,155	392,676	390,714	416,235	566,791	546,383	513,534	639,693
Renault (including partners)	312,801	401,785	302,706	387,670	457,961	414,311	377,289	476,692
Dacia	12,580	19,871	17,704	28,208	27,434	17,228	0	0
Renault Group	325,381	421,656	320,410	415,878	485,395	431,539	377,289	476,692
Renault Trucks	8,321	9,460	-	-	-	-	-	-
Miscellaneous	42	24	-	-	-	-	-	-
TOTAL (2)	712,899	823,816	711,124	832,113	1,025,369	957,338	890,823	1,116,385
of which production in France (2)	370,538	361,521	243,029	414,676	509,563	433,407	372,707	476,868
Citroën	53,561	58,223	42,882	41,471	31,826	20,224	12,785	15,707
Peugeot	67,629	68,166	38,514	39,058	60,488	37,271	19,469	21,782
Opel	-	-	-	-	44,809	49,063	18,583	24,233
Others	-	-	-	22,191	17,092	19,904	37,967	38,881
Stellantis (excluding FCA) (PSA before 2021) (1)	121,190	126,389	81,396	102,720	154,215	126,462	88,804	100,603
Renault	240,985	225,648	161,633	311,956	382,165	327,529	283,903	376,265
Renault Group	240,985	225,648	161,633	311,956	382,165	327,529	283,903	376,265
Renault Trucks	8,321	9,460	-	-	-	-	-	-
Miscellaneous	42	24	-	-	-	-	-	-

(1) Read the notes on page 82
(2) Excluding double-counted production of Opel vehicles from 2017.
Source: CCFA

► LIGHT COMMERCIAL VEHICLE PRODUCTION BY MODEL IN 2023 (IN UNITS)

Brands/Models	World production	Production in France	Production outside France
STELLANTIS (excluding FCA)	639,693	100,603	539,090
Citroën	173,964	15,707	158,257
C3	9,053	0	9,053
Berlingo	73,744	0	73,744
Jumpy	36,596	15,707	20,889
Jumper	54,571	0	54,571
Peugeot	207,435	21,782	185,653
208	3,735	0	3,735
Partner	97,328	0	97,328
Expert	51,106	21,782	29,324
Boxer	50,739	0	50,739
Miscellaneous	4,527	0	4,527
Opel	121,026	24,233	96,793
Vivaro	51,698	24,233	27,465
Combo	42,275	0	42,275
Movano	27,053	0	27,053
Miscellaneous	137,268	38,881	98,387
Fiat (Scudo, Doblo)	81,644	18,221	63,423
Toyota (Proace, Proace city)	55,624	20,660	34,964
RENAULT GROUP	476,692	376,265	100,427
Renault (including Nissan partners)	476,692	376,265	100,427
Dokker / Ludospace	23,112	0	23,112
Kangoo	84,879	84,879	0
Trafic	128,222	128,222	0
Master	162,977	150,260	12,717
Express	60,140	0	60,140
Miscellaneous (Nissan Townstar, Alaskan, Logan)	17,362	12,904	4,458
TOTAL	1,116,385	476,868	639,517

Source: CCFA

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

► PRODUCTION OF LIGHT COMMERCIAL VEHICLES (UP TO 5 TONNES) BY WEIGHT AND BY ENERGY SOURCE (IN UNITS)

		2000	2005	2010	2015	2019	2021	2022	2023
Less than 3.5t	Total	577,926	670,654	531,452	588,686	708,800	656,929	612,264	820,960
	E	55,883	39,019	61,998	46,973	N/A	47,288	61,651	-
	D	521,229	631,499	469,178	537,345	N/A	581,709	482,587	-
	EL	814	136	276	4,368	13,057	27,932	68,026	92,987
From 3.5t to less than 5.1t	Total	134,973	153,162	179,672	243,427	316,569	300,409	278,559	295,425
	E	1,724	719	0	0	0	0	0	-
	D	133,249	152,443	179,672	243,427	316,215	299,610	277,261	-
	EL	-	-	-	-	354	799	1,298	2,586
Total petrol		57,607	39,738	61,998	46,973	N/A	47,288	61,651	-
Total diesel		654,478	783,942	648,850	780,772	N/A	881,319	759,848	-
Total electric		814	136	276	4,368	13,411	28,731	69,324	95,573
TOTAL		712,899	823,816	711,124	832,113	1,025,369	957,338	890,823	1,116,385

E: Petrol. D: Diesel. EL: Electric. G: CNG or LPG.

► PRODUCTION OF LIGHT COMMERCIAL VEHICLES (UP TO 5 TONNES) BY TYPE (IN UNITS)

	2000	2005	2010	2015	2019	2021	2022	2023
Car derivatives								
Citroën	29,449	26,227	14,972	11,715	11,237	12,544	9,431	9,053
Peugeot	41,451	38,133	33,403	19,122	16,486	13,300	6,896	3,735
Opel	-	-	-	-	0	218	0	0
Stellantis excluding FCA (PSA before 2021)	70,900	64,360	48,375	30,837	27,723	26,062	16,327	12,788
Renault-Dacia	60,320	55,009	48,167	40,158	0 (2)	0 (2)	743	196
Total	131,220	119,369	96,542	70,995	27,723	26,062	17,070	12,984
Small vans								
Citroën	100,832	97,954	98,042	90,957	73,702	63,542	50,088	73,744
Peugeot	70,443	70,480	97,608	95,144	95,144	81,325	65,671	97,328
Opel	-	-	-	-	36,481	35,719	26,461	42,275
Autres							33,499	34,964
Stellantis excluding FCA (PSA before 2021)	171,275	168,434	195,650	186,101	205,327	180,586	175,719	248,311
Renault-Dacia	147,670	118,404	97,142	117,863	157,896	149,031	137,683	181,035
Total	318,945	286,838	292,792	303,964	363,223	329,617	313,402	429,346
Vans								
Citroën	61,957	81,195	67,448	83,297	107,692	107,495	103,806	91,167
Peugeot	75,023	78,687	79,241	93,809	129,929	120,359	104,892	101,845
Opel	-	-	-	-	79,028	72,113	68,983	78,751
Autres	-	-	-	22,191	17,092	35,132	37,967	102,304
Stellantis excluding FCA (PSA before 2021)	136,980	159,882	146,689	199,297	333,741	335,099	315,648	374,067
Renault	104,811	228,372	148,404	224,799	278,581	257,901	231,953	291,199
Renault Trucks	8,321	9,460	0	0	0	0	0	0
Sovam-Etalmobil	42	24	0	0	0	0	0	0
Total (1)	250,154	397,738	295,093	424,096	585,505	572,416	547,601	665,266
Others (Pick-ups, 4WD, various)								
Peugeot	-	-	-	-	-	4,636	5,840	4,527
Renault-Dacia-Samsung	12,580	19,871	26,697	33,058	48,918	24,609	6,910	4,262
Total	12,580	19,871	26,697	33,058	48,918	29,245	12,750	8,789
TOTAL	712,899	823,816	711,124	832,113	1,025,369	957,340	890,823	1,116,385

(1) Excluding double-counted production of Opel vehicles from 2017.
(2) Car derivatives were included in cars.
Source: CCFA

DELIVERIES OUTSIDE FRANCE BY THE RENAULT GROUP, STELLANTIS (EXCLUDING FCA) AND RENAULT TRUCKS

The scope of the groups is that on 1 January 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 by French manufacturers include assembled vehicles and collections of spare parts. From 2005, deliveries by Dacia outside France are included in the scope, then by Renault Samsung Motors in 2007. In addition, some deliveries are assigned to the zones, but not to the countries.

From 2018, the scope of deliveries changes to get closer to sales. In general, deliveries corresponding to production for partners are no longer counted. In addition, reclassifications of vehicles into the categories «passenger cars» and «commercial vehicles» are made locally.

► NEW PASSENGER CARS BY DESTINATION (IN UNITS)

	2000	2005	2010	2015	2019	2021	2022	2023
Europe (1)	2,636,150	2,835,899	2,331,256	2,384,342	3,636,407	2,594,409	2,149,897	2,446,470
European Union (2)	2,261,904	2,424,350	1,893,455	1,871,647	2,855,782	1,631,282	1,614,345	1,786,651
Germany	337,743	365,860	299,072	266,587	577,154	359,242	332,241	353,573
Austria	41,510	48,779	50,767	41,349	62,481	35,207	30,485	30,098
Belgium-Luxembourg	172,806	171,552	182,241	146,015	191,216	94,834	101,917	109,846
Denmark	30,239	34,477	27,801	49,204	56,683	35,773	26,224	27,091
Spain	556,934	577,439	302,663	310,876	425,966	224,942	224,014	245,394
Greece	54,270	32,681	10,744	12,132	29,075	24,060	34,193	38,370
Italy	353,616	377,100	317,851	304,829	497,471	316,678	310,092	380,533
The Netherlands	120,438	99,707	108,951	106,236	111,309	59,663	62,017	63,689
Portugal	68,375	66,524	58,750	54,165	82,687	50,836	55,391	70,697
Sweden	31,473	43,062	16,691	32,650	30,305	26,871	23,489	23,012
12 then 13 new Member States	-	276,433	176,330	170,849	378,707	215,706	219,036	217,962
Hungary	23,887	26,926	6,156	11,031	35,946	17,308	16,498	12,487
Poland	59,093	47,521	53,521	50,485	114,589	63,778	60,412	63,341
Romania	7,520	122,930	41,804	45,361	78,368	51,213	56,240	60,306
CEE/CIS (3)	164,814	214,335	206,868	258,054	591,871	538,362	71,250	24,827
Russia	6,042	42,637	158,018	272,461	500,625	471,416	50,839	0
Switzerland	45,654	41,231	50,740	43,545	45,998	27,083	26,465	28,305
United Kingdom	432,507	413,743	280,244	294,142	374,872	210,632	225,899	271,451
Turkey	148,264	142,160	168,456	211,096	130,475	173,837	200,861	330,024
Africa	69,865	103,130	171,484	241,078	238,440	162,779	152,722	126,907
South Africa	13,913	32,941	14,711	23,223	31,375	23,884	32,936	21,988
Maghreb	37,236	42,881	139,790	184,708	164,279	73,941	64,974	61,438
Nigeria	8,860	6,159	210	301	-	-	-	-
Egypt	-	-	-	-	36,207	32,392	14,414	12,597
America	230,270	314,505	559,780	426,937	463,382	327,117	367,851	355,469
Argentina	97,605	70,099	149,746	122,408	66,451	53,538	64,210	80,600
Brazil	80,205	144,030	320,930	210,638	253,873	155,690	170,746	163,624
Colombia	16,659	36,499	6,329	50,819	54,538	46,004	48,763	25,439
Mexico	1,408	39,871	24,822	10,685	28,742	27,122	32,055	44,116
Asia (1)	166,261	512,772	1,201,459	1,070,526	460,757	306,913	305,529	200,585
Japan	15,976	16,323	12,346	25,072	23,403	20,184	20,618	18,574
China	54,334	143,756	392,569	756,268	135,612	84,514	83,158	61,252
Iran	45,722	304,326	516,121	38,176	-	-	-	-
India	-	-	4,488	50,877	88,869	96,142	93,147	57,800
South Korea	-	-	157,824	90,056	157,083	61,648	53,969	23,904
Oceania	9,984	16,698	14,079	17,929	26,791	19,298	33,562	24,545
Australia	2,765	11,872	9,761	13,435	10,103	5,520	8,003	6,494
GRAND TOTAL	3,174,447	3,841,448	4,306,065	4,159,198	4,825,777	3,410,516	3,009,561	3,153,976

► NEW COMMERCIAL VEHICLES BY DESTINATION (IN UNITS)

	2000	2005	2010	2015	2019	2021	2022	2023
Europe (1)	379,289	401,860	357,998	456,712	628,677	757,238	606,517	755,781
European Union (2)	312,421	326,077	312,293	418,876	576,064	545,372	446,884	522,865
Germany	50,081	40,760	46,406	90,020	84,863	101,675	85,424	92,620
Austria	4,697	6,206	6,797	7,585	12,484	19,056	7,009	8,095
Belgium-Luxembourg	22,857	24,827	29,330	29,267	51,019	37,956	30,436	34,689
Spain	57,516	71,185	28,263	38,386	77,346	77,575	62,956	74,345
Italy	35,910	29,706	39,690	34,656	64,263	55,272	48,786	54,444
The Netherlands	23,087	11,630	13,848	15,904	24,894	23,529	19,885	28,429
Portugal	34,551	25,410	18,557	15,539	24,493	16,333	13,725	16,503
12 then 13 new member states	-	51,099	33,784	55,213	73,346	82,857	69,795	73,846
Poland	5,624	9,039	14,258	13,563	28,905	29,286	24,414	23,815
CEEC/CIS (3)	25,100	46,685	16,121	29,981	23,986	39,218	8,900	8,780
Switzerland	4,293	5,934	8,500	7,855	11,239	11,367	9,762	10,972
United Kingdom	55,647	64,554	60,997	101,797	119,736	118,020	99,456	135,448
Turkey	-	-	-	-	9,942	35,587	36,050	71,988
Africa	16,074	22,597	27,769	27,611	13,498	25,619	24,611	17,733
Maghreb	13,509	18,345	24,690	26,466	10,328	7,195	6,801	5,403
America	36,682	33,328	85,810	61,943	83,933	93,551	98,801	94,514
Asia (1)	8,260	11,781	5,632	9,512	46,770	36,343	24,545	22,476
Oceania	1,797	1,967	2,208	6,064	6,502	6,871	6,645	6,147
GRAND TOTAL	444,516	474,532	480,430	563,013	779,380	919,622	761,119	896,651

(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 from 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 RECIPIENT COUNTRIES OF FRENCH AUTOMOBILE EXPORTS

(IN MILLIONS OF EUROS AND BY WEIGHT)

New passenger cars		
Total	20,559	100%
Germany	3,715	18%
Belgium	3,392	16%
Italy	2,261	11%
United Kingdom	1,731	8%
Turkey	1,653	8%
Spain	1,441	7%
The Netherlands	929	5%
Portugal	479	2%
Poland	436	2%
Czech Republic	394	2%
Algeria	387	2%
Switzerland	326	2%
United States	289	1%
Sweden	280	1%
Ireland	247	1%
Egypt	165	1%
Austria	137	1%
Denmark	127	1%
Japan	118	1%
Hungary	109	1%
Romania	148	1%
Slovenia	150	1%
Greece	134	1%
United Arab Emirates	117	1%
Australia	106	1%

New light commercial vehicles		
Total	6,178	100%
Belgium	1,071	17%
United Kingdom	975	16%
Germany	898	15%
Spain	443	7%
Italy	440	7%
Poland	319	5%
Sweden	225	4%
The Netherlands	221	4%
Switzerland	197	3%
Australia	107	2%
Turkey	104	2%
Ireland	103	2%
Austria	100	2%
Denmark	100	2%
Czech Republic	93	2%
Slovenia	78	1%
Norway	78	1%
Hungary	77	1%
Portugal	75	1%
Romania	64	1%
Algeria	61	1%
Morocco	45	1%
Slovakia	36	1%
Finland	32	1%
Ukraine	25	0%

Industrial vehicles and new coaches and buses		
Total	7,072	100%
Germany	1,310	19%
Spain	887	13%
Italy	806	11%
United Kingdom	609	9%
Turkey	394	6%
Belgium	322	5%
Poland	293	4%
The Netherlands	219	3%
Ireland	152	2%
Austria	152	2%
Portugal	143	2%
Czech Republic	134	2%
Morocco	127	2%
Algeria	108	2%
Israel	94	1%
Australia	92	1%
Saudi Arabia	91	1%
Romania	91	1%
Hungary	85	1%
Switzerland	81	1%
Lithuania	80	1%
Bulgaria	65	1%
New Zealand	62	1%
Sweden	55	1%
South Korea	46	1%

Total Parts and Accessories, Chassis-Bodywork, Engines, Trailers		
Total	24,527	100%
Germany	5,094	21%
Spain	3,542	14%
United Kingdom	2,255	9%
Italy	1,502	6%
Belgium	1,418	6%
Poland	1,201	5%
Turkey	784	3%
Slovakia	718	3%
Romania	636	3%
Sweden	604	2%
Morocco	585	2%
United States	578	2%
Czech Republic	565	2%
The Netherlands	533	2%
Portugal	413	2%
Hungary	383	2%
Switzerland	294	1%
China	270	1%
Brazil	270	1%
Argentina	215	1%
Algeria	213	1%
Slovenia	174	1%
Austria	168	1%
South Korea	152	1%
Tunisia	120	0%

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, considering data both from surveys and administrative data (and 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), to better consider 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	2019	2020	2021	2022	2023 (1)
PHYSICAL DATA								
Employee workforce (2)	units	190,830	-	-	-	-	-	-
Company workforce as of 12/31 (excluding temporary workers)	units	-	137,527	120,704	116,108	113,171	107,185	105,000
Production in France (only light vehicles from 2012)	thousands	3,348	2,229	2,175	1,316	1,352	1,383	1,505
Production per person	units	17.5	16.2	18.0	11.3	11.9	12.9	14.3
FINANCIAL DATA								
Net sales	€ million	73,684	78,969	109,088	89,884	99,268	113,561	118,000
Export sales	€ million	42,290	45,526	65,199	52,468	56,148	67,435	70,800
Share of exported sales	%	57.4%	57.6%	59.8%	58.4%	56.6%	59.4%	60.0%
Value added excluding tax	million €	13,282	10,112	12,356	9,258	10,985	11,699	12,400
Value added / sales	%	18.0%	12.8%	11.3%	10.3%	11.1%	10.3%	10.5%
Value added / per person	€ thousand	70	74	102.4	80	97	109	118
Social charges	€ million	2,153	2,302	2,317	2,135.3	1,955.3	2,048.9	-
Social charges per person	€ thousand	11.3	16.7	19.2	18.4	17.3	19.1	-
Remuneration	€ million	5,093	5,696	5,692	5,187	5,683	5,713	-
Remuneration per person	€ thousand	26.7	41.4	47.2	44.7	50.2	53.3	-
Staff costs	€ million	7,246	7,999	8,008	7,323	7,638	7,762	-
Staff costs per person	€ thousand	38.0	58.2	66.3	63.1	67.5	72.4	-
Staff costs / value added	%	54.6%	79.1%	64.8%	79.1%	69.5%	66.3%	-
Gross operating surplus	million €	5,201	1,340	3,452	1,136	2,652	3,299	-
Gross operating surplus / value added	%	39.2%	13.3%	27.9%	12.3%	24.1%	28.2%	-
Financial expenses	€ million	1,178	2,862	1,648	1,878	2,246	1,555	-
Financial expenses / value added	%	8.9%	28.3%	13.3%	20.3%	20.4%	13.3%	-
Financial income	€ million	2,508	2,191	2,901	1,886	3,793	3,009	-
Financial income / value added	%	18.9%	21.7%	23.5%	20.4%	34.5%	25.7%	-
Financial result	€ million	1,330	-671	1,253	8	1,547	1,454	-
Financial result / value added	%	10.0%	-6.6%	10.1%	0.1%	14.1%	12.4%	-
Self-financing capacity	€ million	5,499	1,078	4,294	683	4,569	4,923	-
Self-financing capacity / value added	%	41.4%	10.7%	34.8%	7.4%	41.6%	42.1%	-
Taxes, duties, similar payments	€ million			944	816	737	695	-
Net income	million €	2,851	293	2,117	N/A	2,653	1,813	-
Net income / sales	%	3.9%	0.4%	1.9%	N/A	2.7%	1.6%	-
Gross tangible investments excluding contributions	€ million	3,807	2,078	2,642	2,087	1,833	1,988	-
Capital expenditure / sales	%	5.2%	2.6%	2.4%	2.3%	1.8%	1.8%	-
Capital expenditure / value added	%	28.7%	20.6%	21.4%	22.5%	16.7%	17.0%	-
Investissements / VA	%	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 MANUFACTURING 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 to produce goods or services, enjoying a certain autonomy of decision, for the allocation of its current resources (Law of modernisation of the economy - LME - of 4 August 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 considered (in 2016, around fifty of the largest groups broken down into around one hundred companies). All the other groups (small, medium or large) are considered 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 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 several intermediate products (metals, rubber, plastics, etc.), services (consulting, research, advertising, etc.) and capital goods.

	Units	2000	2010	2019	2020	2021	2022	2023 (1)
PHYSICAL DATA								
Number of companies (>20p until 2007)	units	243	639	531	538	543	524	-
Employee workforce (2)	units	94,171	-	-	-	-	-	-
Company workforce as of 31/12 (excluding temporary workers)	units	-	61,759	96,701	94,025	88,181	84,801	83,500
FINANCIAL DATA								
Net sales	€ million	17,766	16,056	30,615	24,565	25,594	27,041	29,591
Export sales	€ million	7,512	7,865	15,124	13,278	13,154	14,043	15,400
Share of exported sales	%	42.3%	49.0%	49.4%	54.1%	51.4%	51.9%	52.0%
Value added excluding tax	million €	4,643	3,885	7,832	6,432	6,548	6,568	7,102
Value added / sales	%	26.1%	24.2%	25.6%	26.2%	25.6%	24.3%	24.0%
Value added / per person	€ thousand	49	63	81	68	74	77	85
Social charges	€ million	902	937	1,841	1,664	1,677	1,698	-
Social charges per person	€ thousand	9.6	15.2	19.0	17.7	19.0	20.0	-
Remuneration	€ million	2,213	2,302	4,335	3,937	3,969	4,072	-
Remuneration per person	€ thousand	23.5	37.3	44.8	41.9	45.0	48.0	-
Staff costs	€ million	3,115	3,239	6,176	5,601	5,646	5,770	-
Staff costs per person	€ thousand	33.1	52.4	63.9	59.6	64.0	68.0	-
Staff costs / value added	%	67.1%	83.4%	78.9%	87.1%	86.2%	87.8%	-
Gross operating surplus	million €	1,206	412	1,253	446	633	557	-
Gross operating surplus / value added	%	26.0%	10.6%	16.0%	6.9%	9.7%	8.5%	-
Financial expenses	€ million	440	177	1,998	3,037	1,965	3,770	-
Financial expenses / value added	%	9.5%	4.6%	25.5%	47.2%	30.0%	57.4%	-
Financial income	€ million	337	217	2,249	3,575	2,528	3,086	-
Financial income / value added	%	7.3%	5.6%	28.7%	55.6%	38.6%	47.0%	-
Financial result	€ million	-103	40	251	538	562	-684	-
Financial result / value added	%	-2.2%	1.0%	3.2%	8.4%	8.6%	-	-
Self-financing capacity	€ million	889	341	2,059	2,398	1,228	1,327	-
Self-financing capacity / value added	%	19.2%	8.8%	26.3%	37.3%	18.8%	20.2%	-
Taxes, duties, similar payments	€ million			412	399	311	301	-
Net income	million €	-92	-17	644	252	203	-707	-
Net income / sales	%	-0.5%	-0.1%	2.1%	1.0%	0.8%	-	-
Gross tangible investments excluding contributions	€ million	1,024	413	1,106	837	819	770	-
Capital expenditure / sales	%	5.8%	2.6%	3.6%	3.4%	3.2%	2.8%	-
Capital expenditure / value added	%	22.0%	10.6%	14.1%	13.0%	12.5%	11.7%	-
Investissements / VA	%	22,0%	10,6%	15,1%	14,1%	13,0%	12,3%	-

(1) CCFA estimates based on FIEV, INSEE, OPCO2i / Metallurgy Observatory data.

REGISTRATIONS

The special series Transit Temporaire was incorporated into new passenger car registrations from 2004.

► NEW PASSENGER CAR REGISTRATIONS BY BRAND (IN UNITS)

	2000	2005	2010	2015	2019	2021	2022	2023
Alpine	-	-	-	-	3,172	1,618	2,138	2,693
Dacia	-	9,760	104,641	97,441	138,977	125,204	130,855	156,390
Renault	602,415	546,227	497,820	382,504	407,134	268,951	236,405	277,914
Mobilize	0	0	0	0	0	0	34	5
Renault Group	602,415	555,987	602,461	479,945	549,283	395,773	369,432	437,002
Citroën	261,508	275,053	301,607	201,065	235,110	161,883	129,883	125,932
DS	-	-	26,539	30,257	26,845	22,782	20,959	23,372
Opel (1)	-	-	-	-	66,901	37,393	36,052	43,237
Peugeot	397,547	385,739	400,663	327,393	379,582	285,929	245,608	241,512
PSA Group (before 01/17/2021)	659,055	660,792	728,809	558,715	708,438	-	-	-
Alfa Romeo	12,774	13,847	13,033	6,353	3,938	1,541	3,090	3,909
Fiat	95,983	46,157	72,717	54,443	71,666	39,914	36,508	40,336
Jeep	3,001	3,525	1,177	8,585	11,541	10,822	5,727	7,452
Lancia	5,864	4,414	3,368	1,469	1	0	0	0
Maserati	-	174	162	508	420	135	136	137
FCA Group (before 01/17/2021)	122,449	73,183	91,337	71,358	87,566	-	-	-
Stellantis	-	-	-	-	-	560,399	477,963	485,887
Bolloré	-	-	0	1,191	1	0	0	0
Miscellaneous France	63	148	56	50	121	87	142	68
Total Renault Group and Stellantis (2) & French brands	1,261,533	1,216,927	1,331,326	1,039,901	1,257,843	956,259	847,537	922,957
Audi	34,937	44,311	50,936	58,734	57,532	50,083	43,687	49,417
BMW	31,576	40,508	46,074	53,558	58,751	45,969	45,439	59,601
BYD	-	-	-	-	-	-	-	520
Chevrolet	1,043	7,940	21,247	121	52	9	22	6
Cupra	-	-	-	-	-	4,006	7,555	14,946
Ford	117,061	103,597	114,810	80,729	78,838	43,777	47,095	51,649
Honda	8,716	8,883	11,251	7,325	8,196	5,374	5,438	4,881
Hyundai	11,019	27,396	18,785	23,968	39,970	45,241	47,106	49,400
Jaguar	1,939	2,118	1,126	1,530	3,561	1,718	1,093	1,008
Kia	2,631	18,073	24,055	29,146	45,056	44,215	46,224	49,192
Land Rover	7,570	6,946	2,735	8,846	7,878	6,078	4,372	6,918
Leapmotor	0	0	0	0	0	0	2	510
Lexus	-	-	1,921	4,457	7,159	4,704	3,256	5,675
Lynk Co	-	-	-	-	-	300	3,098	3,307
Mazda	6,366	11,440	10,232	8,418	12,596	9,482	7,040	10,095
Mercedes-Benz	43,389	54,779	45,612	55,376	70,214	50,789	47,977	51,836
M.G.	-	-	-	-	-	4,619	12,666	33,374
Mini	-	12,627	18,007	22,512	27,158	25,337	25,649	28,187
Mitsubishi	5,575	6,758	3,514	3,936	7,207	1,967	2,439	2,665
Nissan	31,330	40,858	54,084	74,102	42,313	26,414	27,169	36,450
Opel (1)	133,576	106,462	94,877	64,170	-	-	-	-
Porsche	825	2,404	2,073	4,943	5,572	4,487	3,857	3,505
Seat	40,562	32,744	30,645	22,009	37,148	26,687	13,684	17,879
Seres	0	0	0	0	0	26	321	230
Skoda	11,570	15,044	18,533	21,759	36,498	30,399	28,904	38,257
Smart	6,645	12,649	6,408	8,107	10,494	1,602	1,341	2,024
Ssangyong	19	3,972	451	636	157	120	18	2
Subaru	2,312	1,464	1,146	841	510	67	28	37
Suzuki	11,355	21,125	22,070	18,506	30,758	22,907	14,750	21,866
Tesla	0	0	11	708	7,442	26,446	29,199	63,041
Toyota	43,698	87,500	65,390	71,755	101,730	96,170	100,268	107,950
Volkswagen	152,868	136,011	146,538	144,103	149,105	105,298	97,292	120,225
Volvo	6,777	11,096	11,841	13,876	21,696	17,285	13,515	14,989
Total Others (3)	872,351	900,634	920,342	877,325	956,436	702,745	681,498	851,766
GRAND TOTAL	2,133,884	2,117,561	2,251,668	1,917,226	2,214,279	1,659,004	1,529,035	1,774,723
including Temporary Transit	-	49,772	39,011	31,665	30,326	14,361	14,452	20,987
Renault Group and Stellantis (2) & French brands as a %	59.1%	57.5%	59.1%	54.2%	56.8%	57.6%	55.4%	52.0%
Total Others as a %	40.9%	42.5%	40.9%	45.8%	43.2%	42.4%	44.6%	48.0%

(1) Opel has belonged to the PSA Group since 1 August 2017. Thus, registrations of this brand are presented at PSA for the period from 08/01/2017 to 12/31/2017.
(2) Excluding FCA before 2021.
(3) Including various and FCA before 2021.

► REGISTRATIONS OF USED PASSENGER CARS (IN UNITS)

	2000	2005	2010	2015	2019	2021	2022	2023
TOTAL	5,082,122	5,383,361	5,386,007	5,562,082	5,790,612	6,016,321	5,204,976	5,195,565
Used/new ratio	2.4	2.5	2.4	2.9	2.6	3.6	3.4	2.9

► REGISTRATIONS OF USED LIGHT COMMERCIAL VEHICLES (IN UNITS)

	2000	2005	2010	2015	2019	2021	2022	2023
TOTAL	651,033	718,948	806,398	789,073	817,285	896,509	814,352	839,958
Used/new ratio	1.6	1.7	1.9	2.1	1.7	2.1	2.3	2.2

Source: CCFA

REGISTRATIONS

The special series Transit Temporaire was incorporated into the registrations of new passenger cars from 2004.

► REGISTRATIONS OF NEW 100% ELECTRIC PASSENGER CARS BY BRAND (IN UNITS)

	2010	2015	2018	2019	2020	2021	2022	2023
Dacia	0	0	0	0	1,722	11,386	18,326	29,761
Renault	13	10,408	17,038	18,817	39,672	32,455	40,430	32,444
Renault Group	13	10,408	17,038	18,817	41,394	43,841	58,756	62,205
Citroën	27	397	1,140	727	2,036	2,991	4,435	5,287
DS	0	0	0	111	2,710	1,806	1,755	2,039
Peugeot	30	725	1,344	628	19,583	23,706	26,751	29,121
Opel (1)	0	0	0	0	2,171	3,424	4,987	6,533
PSA Group (before 01/17/2021)	57	1,122	2,484	1,466	26,500	-	-	-
Alfa Romeo	0	0	0	0	0	0	0	0
Chrysler-Dodge-Jeep	0	0	0	0	0	0	0	1,518
Fiat	0	0	0	0	1,761	9,556	15,269	24,259
FCA Group (before 01/17/2021)	0	0	0	0	1,761	-	-	-
Stellantis	-	-	-	-	-	41,483	53,197	68,757
Total Renault Group and Stellantis (2) & French brands	70	11,530	19,522	20,283	67,894	85,324	111,953	130,962
Audi	0	0	0	453	803	1,369	3,034	4,222
BYD	0	2	0	0	0	0	0	520
BMW-Mini	50	279	1,267	2,793	4,222	7,487	9,170	16,301
Cupra	0	0	0	0	0	59	1,349	3,224
Ford	0	1	0	0	20	762	704	2,496
Hyundai	0	0	906	2,066	5,944	6,744	8,963	8,675
Jaguar	0	0	130	451	141	49	49	48
Kia	0	485	865	2,244	5,930	8,489	7,483	9,158
Leap Motor	0	0	0	0	0	0	2	510
M.G.	0	0	0	0	656	2,106	7,120	26,835
Mazda	0	0	0	0	617	772	379	515
Mercedes-Benz	0	93	0	91	554	1,511	2,597	4,248
Nissan-Infiniti	0	2,298	4,758	3,893	3,512	3,582	2,693	1,732
Porsche	0	0	0	0	527	681	614	592
Skoda	0	0	0	0	599	2,193	2,321	4,212
Tesla	11	708	1,252	7,442	7,372	26,446	29,199	63,041
Toyota-Lexus	0	0	0	0	2	274	216	798
Volkswagen	0	291	653	828	7,480	10,518	10,727	12,544
Volvo	0	0	0	0	134	476	2,307	3,733
Total Others (3)	114	5,738	11,537	22,481	43,022	76,782	90,976	167,257
GRAND TOTAL	184	17,268	31,059	42,764	110,916	162,106	202,929	298,219
Share of electric registrations	0.0%	0.9%	1.4%	1.9%	6.7%	9.8%	13.3%	16.8%
Renault Group & Stellantis (2) & French brands in %	38.0%	66.8%	62.9%	47.4%	61.2%	52.6%	55.2%	43.9%
Total others as a %	62.0%	33.2%	37.1%	52.6%	38.8%	47.4%	44.8%	56.1%

► REGISTRATIONS OF NEW PLUG-IN HYBRID PASSENGER CARS

(IN UNITS)

	2010	2015	2018	2019	2020	2021	2022	2023
Dacia	0	0	0	0	0	0	0	0
Renault	0	0	0	0	6,281	11,879	4,120	1,569
Renault Group	0	0	0	0	6,281	11,879	4,120	1,569
Citroën	0	0	0	0	3,119	7,116	8,500	9,120
DS	0	0	0	203	4,535	6,608	7,352	11,269
Peugeot	0	0	0	0	6,281	11,879	4,120	1,569
Opel (1)	0	0	0	1	945	822	930	2,298
PSA Group (before 01/17/2021)	0	0	0	204	14,880	-	-	-
Alfa Romeo	0	0	0	0	0	0	0	1,386
Chrysler-Dodge-Jeep	0	0	0	0	1,475	5,639	3,846	3,091
Fiat-Lancia	0	0	0	0	0	0	0	0
FCA Group (before 01/17/2021)	0	0	0	0	1,475	-	-	-
Stellantis	-	-	-	-	-	32,064	24,748	28,733
Total Renault Group and Stellantis (2) & French brands	0	0	0	204	21,161	38,304	25,022	25,825
Audi	0	1,129	538	312	4,689	9,657	6,794	11,204
BMW-Mini	0	846	4,459	4,089	8,817	13,273	15,381	20,679
Cupra	0	0	0	0	25	2,066	814	5,250
Ford	0	0	0	0	2,092	3,826	1,513	2,690
Honda	0	0	0	0	0	0	0	160
Hyundai	0	0	541	723	693	5,322	5,766	4,519
Jaguar-Land Rover	0	0	601	1,889	2,225	3,994	2,989	6,239
Kia	0	0	505	1,054	1,572	3,932	7,657	6,165
Lynk Co	0	0	0	0	0	300	3,098	3,307
M.G.	0	0	0	0	0	2,513	2,415	2,634
Mazda	0	0	0	0	0	0	388	1,379
Mercedes-Benz	0	152	1,489	943	11,111	18,018	17,026	20,485
Mitsubishi	0	907	1,304	3,118	2,642	809	1,522	982
Nissan-Infiniti	0	0	0	0	0	0	0	0
Opel (1)	0	6	0	0	0	0	0	0
Seat	0	0	0	0	753	1,083	22	378
Skoda	0	0	0	0	693	1,351	635	1,096
Suzuki	0	0	0	0	190	293	428	801
Toyota-Lexus	82	68	281	288	232	1,306	2,217	3,507
Volkswagen	0	1,850	1,249	563	3,551	5,972	4,054	9,574
Volvo	0	125	2,374	3,806	7,167	10,636	6,843	7,784
Total others (2)	82	5,589	14,528	18,388	53,431	102,697	101,525	137,125
GRAND TOTAL	82	5,589	14,528	18,592	74,592	141,001	126,547	162,950
Share of plug-in hybrid registrations	0.0%	0.3%	0.7%	0.8%	4.5%	8.5%	8.3%	9.2%
Renault Group & Stellantis (2) & French brands as a %	0.0%	0.0%	0.0%	1.1%	28.4%	27.2%	19.8%	15.8%
Total Others as a %	100.0%	100.0%	100.0%	98.9%	71.6%	72.8%	80.2%	84.2%

(1) Opel has been part of the PSA Group since 1 August 2017. Thus, registrations of this brand are presented at PSA for the period from 08/01/2017 to 12/31/2017.
(2) Excluding FCA before 2021.
(3) Including various and FCA (before 2021).

REGISTRATIONS

► REGISTRATIONS OF NEW LIGHT COMMERCIAL VEHICLES BY BRAND (UP TO 5 TONNES) (IN UNITS)

	2000	2005	2010	2015	2019	2021	2022	2023
Dacia	0	0	5,434	2,594	1,572	1,200	1,284	1,802
Renault	139,752	140,059	135,591	124,634	147,826	124,737	99,572	112,570
Renault Group	139,752	140,059	141,025	127,228	149,398	125,937	100,856	114,372
Citroën	77,048	73,166	70,579	59,295	74,026	66,596	55,114	55,075
DS	0	0	259	489	179	144	111	94
Peugeot	74,950	73,778	72,228	59,649	85,360	76,833	59,457	63,783
Opel (1)	-	-	-	-	7,442	9,169	7,286	8,639
PSA Group (Stellantis from 01/17/2021)	151,998	146,944	143,066	119,433	167,007	-	-	-
Fiat	25,253	12,497	34,659	32,071	37,572	35,610	20,295	19,686
Jeep	-	146	287	1,268	1,794	275	354	139
FCA Group (Stellantis from 01/17/2021)	25,253	12,643	34,946	33,339	39,366	-	-	-
Stellantis	-	-	-	-	-	188,627	142,617	147,416
Miscellaneous France	40	10,076	528	905	869	678	1,019	1,246
Total Renault Group & Stellantis (2) & other French brands	291,790	297,079	284,619	247,566	317,274	314,564	243,473	261,788
Audi	-	357	3,223	790	810	472	362	309
BMW	-	0	1,600	446	383	291	207	237
Ford	18,110	19,695	20,437	22,534	32,798	29,397	27,130	33,680
Fuso	-	-	-	242	655	1,221	1,232	1,172
Hyundai	588	1,380	237	195	347	341	403	604
Isuzu	108	1,370	1,961	2,024	2,495	1,840	2,253	1,894
IVECO	16,534	15,721	11,610	11,414	17,030	17,492	15,469	14,484
Kia	-	219	142	177	175	248	225	223
Land Rover	1,857	1,256	1,550	2,591	625	595	479	694
MAN	-	-	-	-	1,763	2,465	2,311	2,489
Mercedes	23,139	18,973	19,051	18,643	23,385	22,890	19,073	18,115
Mitsubishi	3,392	1,350	2,639	1,836	1,757	1,424	642	12
Nissan	5,197	9,746	7,307	7,260	8,167	7,859	5,832	6,070
Opel (1)	7,561	12,617	7,195	6,782	-	-	-	-
Seat	-	286	435	410	567	757	277	282
Skoda	-	122	715	340	497	702	570	1,662
Suzuki	-	586	457	99	734	2,439	1,961	3,012
Toyota	1,771	2,587	4,013	5,210	8,542	9,815	9,543	12,722
Volkswagen	13,819	10,043	13,249	16,375	21,182	16,387	14,556	16,926
Total others (3)	123,176	122,986	132,993	131,860	162,475	118,063	104,603	117,442
GRAND TOTAL	414,966	420,065	417,612	379,426	479,749	432,627	348,076	379,230
Renault Group & Stellantis (2) & other French brands as a %	70.3%	70.7%	68.2%	65.2%	66.1%	72.7%	69.9%	69.0%
Total Others as a %	29.7%	29.3%	31.8%	34.8%	33.9%	27.3%	30.1%	31.0%

(1) Opel has been part of the PSA Group since 1 August 2017. Thus, registrations of this brand are presented at PSA for the period from 08/01/2017 to 12/31/2017.
(2) Excluding FCA before 2021.
(3) Including miscellaneous and FCA (before 2021).

► REGISTRATIONS OF NEW INDUSTRIAL VEHICLES BY BRAND (OVER 5 TONNES) (IN UNITS)

	2000	2005	2010	2015	2019	2021	2022	2023
Renault Trucks	20,818	18,339	10,908	11,568	15,308	13,064	12,873	13,188
Total Renault Trucks and miscellaneous France	20,992	18,465	10,964	11,584	15,323	13,066	12,876	12,881
DAF	4,365	6,321	4,464	4,723	7,295	5,519	6,263	6,606
IVECO	6,998	5,901	4,003	4,783	4,248	4,063	3,741	4,427
MAN	3,498	4,545	2,729	4,581	6,095	4,516	3,973	4,540
Mercedes-Benz	9,976	9,325	5,229	6,128	7,513	5,721	5,873	6,315
Scania	4,963	4,417	2,553	4,359	7,038	5,026	4,242	5,677
Volvo	6,739	5,870	3,938	5,219	7,018	5,611	6,143	6,751
Total miscellaneous	36,924	36,819	23,257	30,132	39,892	31,072	31,135	35,972
TOTAL	57,916	55,284	34,221	41,716	55,215	44,138	44,011	48,853
Renault Trucks and miscellaneous France as a %	36.2%	33.4%	32.0%	27.8%	27.8%	29.6%	29.3%	26.4%
Total miscellaneous as a %	63.8%	66.6%	68.0%	72.2%	72.2%	70.4%	70.7%	73.6%

► REGISTRATIONS OF USED INDUSTRIAL VEHICLES (OVER 5 TONNES) (IN UNITS)

	2000	2005	2010	2015	2019	2021	2022	2023
TOTAL	59,056	55,975	56,142	48,381	53,571	53,504	54,465	54,223
Used/new ratio	1.0	1.5	1.6	1.1	1.0	1.2	1.2	1.1

► REGISTRATIONS OF NEW COACHES AND BUSES BY GROUP (OVER 5 TONNES) (IN UNITS)

	2000	2005	2010	2015	2019	2021	2022	2023
Renault	1,633	39	0	0	0	1	1	0
TOTAL	4,320	-	-	-	-	-	-	-
IVECO BUS (1)	-	2,459	2,412	3,197	2,862	3,313	2,981	2,889
Evobus (2)	-	888	1,433	2,050	1,444	1,048	791	1,206
VGF Group (3)	-	404	559	589	942	1,131	765	730
Bova	-	198	116	0	0	0	1	2
Temsa	-	301	309	146	150	241	178	194
Van Hool	230	238	169	98	157	21	49	60
Yutong	-	-	-	96	20	7	60	10
Irizar	-	0	0	38	202	119	68	98
Isuzu	-	0	0	8	122	173	149	145
Otokar	-	0	105	187	193	147	190	171
Miscellaneous	-	237	279	315	325	303	200	191
TOTAL	-	4,773	5,382	6,724	6,417	6,503	5,432	5,696

(1) IVECO BUS: IVECO and IVECO BUS, Irisbus, Heuliez.
(2) Evobus: Setra and Mercedes.
(3) VGF: MAN and Neoplan, then Scania from 2015.

MOTORISATION

► AUTOMOBILE DENSITY IN EUROPE

NUMBER OF PRIVATE CARS PER 1000 INHABITANTS

	2015	2018	2019	2020	2021	2022
Germany	555	569	575	580	584	586
Belgium	497	507	508	506	506	506
Spain	481	526	533	531	535	541
France	564	571	573	572	573	572
Greece	470	481	489	496	506	525
Hungary	324	372	390	401	413	422
Italy	614	645	661	666	672	681
The Netherlands	493	511	517	520	523	525
Poland	545	617	642	662	684	703
Portugal	437	487	506	515	525	537
Czech Republic	490	547	562	573	588	611
Romania	259	330	355	376	396	413
Sweden	479	481	478	479	480	477
EUROPEAN UNION	553	545	555	560	567	574
Norway	502	514	520	521	520	530
Switzerland	547	550	535	549	551	546
EFTA	529	539	532	540	541	542
Russia	284	301	308	312	-	-
Türkiye	136	153	152	158	-	-
United Kingdom	517	526	528	544	546	549
EUROPE	-	453	460	466	-	-

Source: ACEA, Vehicles in use Europe January 2024

► VEHICLES IN USE (AS OF 1 JANUARY 2024) (IN THOUSANDS)

	All energies	Diesel	Others
Passenger cars (PC)			
5 HP & less	19,059	8,122	10,937
6 HP to 10 HP	17,990	10,781	7,209
11 HP & more	2,209	981	1,228
TOTAL PC	39,259	19,885	19,374
Light commercial vehicles (LCV)			
Less than 2.5t	2 824	2 458	366
From 2.5t to 3.5t	3 655	3 594	62
From 3.6t to 5t	158	135	23
Total LCV up to 5t (1)	6 637	6 187	450
TOTAL LIGHT VEHICLES (PC + LCV)	45 896	26 071	19 824
Heavy trucks over 5t			
Rigids			
From 5.1t to less than 12t	81	80	1
From 12t to less than 20t	154	151	3
20t & more	163	160	3
Total rigids	398	391	7
Road tractors	227	221	6
TOTAL HEAVY TRUCKS	625	612	11
COACHES AND BUSES	94	80	14
TOTAL CV OVER 3.5T	719	693	26
TOTAL CV ALL TONNAGES	7,356	6,879	477
TOTAL ALL VEHICLES	46,614	26,764	19,851

(1) Including unknown weights.
Source: MTE/SDES, CCFA estimates

► MOTORISATION

	units	2000	2010	2015	2019	2020	2022	2023
Non-motorised households	%	19.7%	16.5%	17.1%	15.0%	14.8%	15.0%	15.7%
Motorised households	%	80.3%	83.5%	82.9%	85.0%	85.2%	85.0%	84.3%
Single-motorised households	%	50.7%	47.6%	48.4%	48.3%	48.2%	48.7%	48.3%
Two-motorised households	%	25.4%	30.7%	29.4%	31.5%	31.7%	31.3%	31.0%
Three-motorised and more households	%	4.2%	5.2%	5.1%	5.2%	5.3%	5.0%	5.0%
Demotorised households	%	58%	45%	55%	56%	55%	54%	50%
Average age of vehicle	year	7.25	8.0	8.9	8.9	9.0	9.8	9.8
Average ownership period	year	4.43	5.0	5.5	5.5	5.6	6.2	6.3
Used passenger cars	%	56.1	58.9	58.5	58.0	59.0	59.6	59.3
Average annual mileage (total)	km	13,670	12,240	11,710	11,900	9,730	10,830	10,840
Average annual mileage (petrol)	km	11,690	8,440	8,030	8,850	7,190	8,610	8,870
Average annual mileage (diesel)	km	18,240	14,720	13,990	14,410	11,950	13,160	13,060
Domestic passenger traffic								
In private vehicles	billions pass.-km	826.6	841.1	859	893	715	864	850
In coaches-buses	billions pass.-km	45.4	53.9	58.5	60.8	37.8	48.0	53.8
Total traffic	billions pass.-km	966.8	1,009.4	1,036.5	1,079.2	822.5	1,036.1	1,032.9
Share of road traffic in total traffic	%	90.2	88.7	88.5	88.4	91.6	88.0	87.5
Annual traffic evolution								
In private vehicles	% var/n-1	-0.1	0.8	1.2	1.1	-19.9	10.2	-1.6
In coaches-buses	% var/n-1	2.7	2.2	1.6	2.7	-37.7	15.2	12.0

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

► CAR FLEET AS OF 1 JANUARY BY ENGINE TYPE

(IN THOUSANDS)

	2015	2020	2023	2024
Electric and Hydrogen	26	142	596	869
Petrol	12,841	14,956	15,756	15,926
Diesel	23,429	22,611	20,665	19,885
Gas	178	146	235	291
Plug-in hybrid	31	85	425	577
Non-rechargeable hybrid	123	480	1,290	1,709
Others	4	3	3	2
Together	36,632	38,422	38,971	39,259

► CAR FLEET ON 1 JANUARY ACCORDING TO THE CRIT'AIR STICKER (IN THOUSANDS)

	2015	2020	2023	2024
Crit'Air E	25	141	596	869
Crit'Air 1	2,843	8,487	11,880	12,982
Crit'Air 2	9,248	13,549	14,180	14,027
Crit'Air 3	12,178	9,935	8,129	7,605
Crit'Air 4	5,332	3,670	2,557	2,297
Crit'Air 5	1,880	960	557	489
Unknown and unclassified	5,125	1,680	1,071	989
All	36,632	38,422	38,971	39,259

Source: MTE/SDES

POLLUTING EMISSIONS AND CO_2

► EVOLUTION OF EMISSIONS IN METROPOLITAN FRANCE BETWEEN 1990 AND 2023

	1990	2000	2010	2019	2020	2022	2023	Variation 2023/1990	Variation 2023/2022
POLLUTING EMISSIONS FROM ROADS (In thousands of tonnes)									
SO_2	143.2	23.0	0.8	0.8	0.7	0.8	0.8	-99%	-2.6%
CO	6,020	2,565	755	302	221	231	218	-96%	-5.5%
NOx	1,249	948	596	390	305	305	273	-78%	-10.3%
NMVOC	925	441	120	48	37	35	32	-97%	-7.6%
Lead (in tonnes)	3,891	36	39	37	35	34	32	-99%	-4.9%
PM10: particles	73	68	44	26	21	22	21	-71%	-4.9%
OTHER EMISSIONS FROM ROADS (In millions of tonnes)									
CO_2 net of CO_2 emissions from renewable energies	112	128	122	119	101	117	113	1%	-3.3%
CO_2 from biomass combustion	0	1	7	9	7	8	8	-	2.1%

Source: CITEPA/Secten data 2024 edition

► CO_2 EMISSIONS IN METROPOLITAN FRANCE BY SECTOR OF ACTIVITY (IN MILLIONS OF TONNES OF CO_2 AND AS A % OF THE TOTAL EXCLUDING LULUCF)

	1990	2000	2010	2019	2020	2022	2023	As a % of the total excluding LULUCF (1) in 2023
Energy transformation	68.8	63.5	59.1	39.5	34.7	37.7	30.1	11
	17%	16%	16%	13%	12%	13%	11%	-
Manufacturing industry	107.5	106.8	88.0	73.7	65.6	67.3	61.4	23
	27%	26%	23%	23%	23%	23%	23%	-
Waste treatment	1.9	1.4	1.3	1.5	1.5	1.4	1.4	1
	0%	0%	0%	0%	1%	0%	1%	-
Residential/tertiary	85.3	86.1	87.6	64.3	61.3	52.4	49.2	18
	22%	21%	23%	20%	22%	18%	18%	-
Agriculture/forestry	11.6	12.6	12.1	10.8	11.9	11.5	11.3	4
	3%	3%	3%	3%	4%	4%	4%	-
Transport	118.5	135.6	128.2	125.1	105.5	123.1	118.9	44
	30%	33%	34%	40%	38%	42%	44%	-
of which road	112.1	128.1	122.4	119.1	101.0	117.3	113.4	42
	28%	32%	33%	38%	36%	40%	42%	-
of which other transport	6.4	7.5	5.9	6.0	4.5	5.8	5.5	2
	2%	2%	2%	2%	2%	2%	2%	-
TOTAL EXCLUDING LULUCF (1)	393.6	406.0	376.4	314.9	280.4	293.4	272.5	100
LULUCF (1)	-24.0	-29.3	-42.4	-23.3	-25.9	-23.0	-25.0	-
TOTAL WITH LULUCF (1)	369.6	376.7	334.0	291.6	254.5	270.5	247.5	-

(1) LULUCF: Land Use, Land Use Change and Forestry.
Source: CITEPA/CORALIE/Secten format 2024 edition

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

	2000	2005	2010	2015	2019	2021 (1)	2022 (2)	2023 (2)	Variation 2023/2022
FRANCE									
Petrol	168	159	130	116	116	-	-	-	-
Diesel	155	149	130	111	113	-	-	-	-
TOTAL FRANCE	162	152	130	111	112	109	103.1	96.8	-6.3
EUROPEAN UNION									
Italy	161	149	134	115	-	125	119.2	120.1	0.9
Spain	162	150	140	115	-	127	121.5	117.5	-4
United Kingdom	180	169	145	121	-	-	-	-	-
Germany	179	170	152	128	-	114	105.9	113	7.1
AVERAGE EU 15 COUNTRIES	171	161	141	119	-	-	110	-	-

(1) The new procedure (WLTP) leads to CO_2 emission rates 10% to 25% higher than with the old procedure (NEDC cycle). From 2021, the data are therefore not comparable with previous years.
(2) Source: EEA (European Environment Agency).
Source: ADEME

TAX RESOURCES FROM THE AUTOMOBILE INDUSTRY

► CONSUMPTION, PRICES AND TAXES ON ROAD FUELS

	units	2000	2005	2010	2015	2019	2020	2022	2023
FUEL CONSUMPTION									
Petrol	millions of litres	14,329	14,097	10,880	9,510	11,296	9,759	13,058	13,747
Unleaded petrol 98	millions of litres	7,138	4,280	2,202	1,998	2,449	2,260	2,570	2,674
Unleaded petrol 95	millions of litres	7,191	9,816	7,299	4,314	3,466	2,412	2,320	2,179
Unleaded petrol 95-E10	millions of litres	-	-	1,379	3,198	5,381	4,734	7,314	7,998
	as a % of total petrol	-	-	12.7%	33.6%	47.6%	48.5%	56.0%	58.2%
Ethanol-petrol blend E85		-	-	-	-	-	353	854	895
Diesel	millions of litres	32,373	36,744	39,749	41,187	39,019	32,803	36,233	34,257
TOTAL ROAD FUELS	millions of litres	46,703	50,840	50,629	50,697	50,316	42,562	49,292	48,003

Source: CPDP

	units	2000	2005	2010	2015	2019	2020	2022	2023
FUEL PRICES AT THE PUMP (annual average)									
Unleaded petrol 98	euros/litre	1.11	1.20	1.38	1.42	1.57	1.42	1.86	1.94
Taxes as a %	%	69	65	60	61	61	65	54	52.3
Unleaded petrol 95-E10	euros/litre	-	-	-	1.35	1.48	1.34	1.77	1.86
Taxes as a %	%	-	-	-	64	62	67	55	53
Superethanol E85	euros/litre	-	-	-	-	-	0.66	0.80	1.06
Taxes as a %	%	-	-	-	-	-	35	32	28
Petrol	euros/litre	1.11	1.18	1.35	1.36	1.51	1.31	1.62	1.77
Taxes as a %	%	70	67	61	63	62	66	54	51
Diesel	euros/litre	0.85	1.02	1.15	1.15	1.44	1.26	1.85	1.79
Taxes as a %	%	62	57	54	59	59	65	50	51

Source: DGEC

► TAX RESOURCES FROM THE AUTOMOBILE INDUSTRY (IN MILLIONS OF EUROS)

	2000	2005	2010	2015	2019	2020	2022	2023
Taxes on petroleum products for road use (including VAT)	30,630	32,205	32,324	36,294	43,070	35,159	41,678	46,269
Vehicle registration certificates (grey cards)	1,373	1,623	1,917	2,086	2,296	2,091	1,891	2,033
Annual tax on parking areas	-	-	-	59	70	76	76	79
Vehicle insurance taxes	3,429	4,057	4,126	4,662	5,269	5,406	5,714	5,979
Traffic taxes (vignettes)	539	145	0	0	0	0	0	0
Taxes on company cars	644	867	992	753	768	801	693	642
Axle taxes	223	205	168	169	167	171	166	150
Fixed police and traffic fines	720	1,266	1,255	1,562	1,578	1,316	1,803	2,006
Taxes on driving licenses	14	4	1	11	10	10	10	0
Taxes on regional planning	442	499	539	555	523	459	561	561
Road and transport investment fund (DOM)	-	-	1	1	0	0	1	1
Domanial royalties	132	154	186	326	355	365	367	401
General tax on polluting activities (TGAP) (1)	-	20	500	600	426	505	998	1,517
VAT on acquisition expenses (passenger cars)	6,603	7,693	8,171	8,709	10,886	8,519	8,978	11,088
VAT on repairs, maintenance, technical inspections, garages and driving licenses (passenger cars)	4,324	5,898	7,133	8,081	9,875	9,102	11,000	11,798
Tax resources from the automobile industry (including VAT)	49,073	54,636	57,313	63,869	75,293	63,981	73,936	82,524
including specific automobile taxation	-	37,200	37,300	40,800	47,494	42,100	47,813	50,261
including specific taxation on fuels: TICPE and VAT on TICPE	-	28,900	28,200	31,500	37,594	32,400	36,659	38,131
ADDITIONAL INFORMATION (In millions of euros)								
Freeway tolls (excl. VAT)	4,457	6,410	8,110	9,390	10,860	9,000	11,610	12,300
Freeway tolls (incl. VAT)	5,330	7,666	9,700	11,268	13,032	10,800	13,932	14,760
Total APU (2) expenditure on roads	-	15,800	16,500	14,600	14,300	14,100	15,102	14,669

(1) Depending on the rate of incorporation of agrofuel.
(2) APU: Public administrations; total expenditure on transport is equal to current expenditure and investment expenditure; the figure presented may include double counting and is therefore an increase.
(3) Estimate CCFA VAT repairs.
Sources: General Directorate of Taxes, CCFA, URF, MTE/SDES, Commission des Comptes des Transports de la Nation

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► FRENCH AUTOMOTIVE MANUFACTURERS

Stellantis
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92100 Boulogne Billancourt cedex
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40, avenue de Bréauté
76885 Dieppe cedex
Tel.: 01 76 86 31 50
www.alpinecars.com

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Fédération Française de Carrosserie Industries et Services (FFC)
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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

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43 bis, route de Vaugirard
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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

SESAMIld (Syndicat des Entreprises des Services Automobiles en LLD et des Mobilité)
25, boulevard Romain Rolland
75014 Paris
Tel.: 01 59 51 04 49
www.sesamlld.com

Syndicat des Véhicules de Loisirs (UNI VDL)
3, rue des Cordelières
75013 Paris
Tel.: 01 43 37 86 61
www.univdl.org

Industries et Métiers de la Métallurgie (UIMM)
56, avenue de Wagram
75017 Paris
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Union Routière de France (URF)
9, rue de Berri
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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www.utacceram.com

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www.acea.auto

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Fédération Française du Sport Automobile (FFSA)
32, avenue de New-York
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Tel.: 01 44 15 27 00
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75009 Paris
Tel.: 01 53 25 00 60
www.avere-france.org

Groupe d'Études et de Recherches Permanent sur l'Industrie et les Salariés de l'Automobile (GERPISA)
4, avenue des Sciences,
91190 Gif-sur-Yvette
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www.gerpisa.org

ID4MOBILITY
40 rue de la tour d'Auvergne
Hall 6 East
44200 Nantes
Tel.: 02 52 59 59 19
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1 & 4, avenue de Bois Préau
92852 Rueil Malmaison Cedex
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Institut Français des Sciences et Technologies des Transports, de l'Aménagement et des Réseaux (IFSTTAR)
Head office:
14-20, boulevard Newton
Cité Descartes, Champs sur Marne
77447 Marne la vallée Cedex 2
Tel.: 01 81 66 80 00
www.ifsttar.fr

CARA
1, boulevard Edmond Michelet
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Innovapôle 76
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76800 Saint-Etienne du Rouvray
Tel.: 02 35 65 78 17
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15, rue Armand Japy
25461 Etupes Cedex
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68060 Mulhouse Cedex
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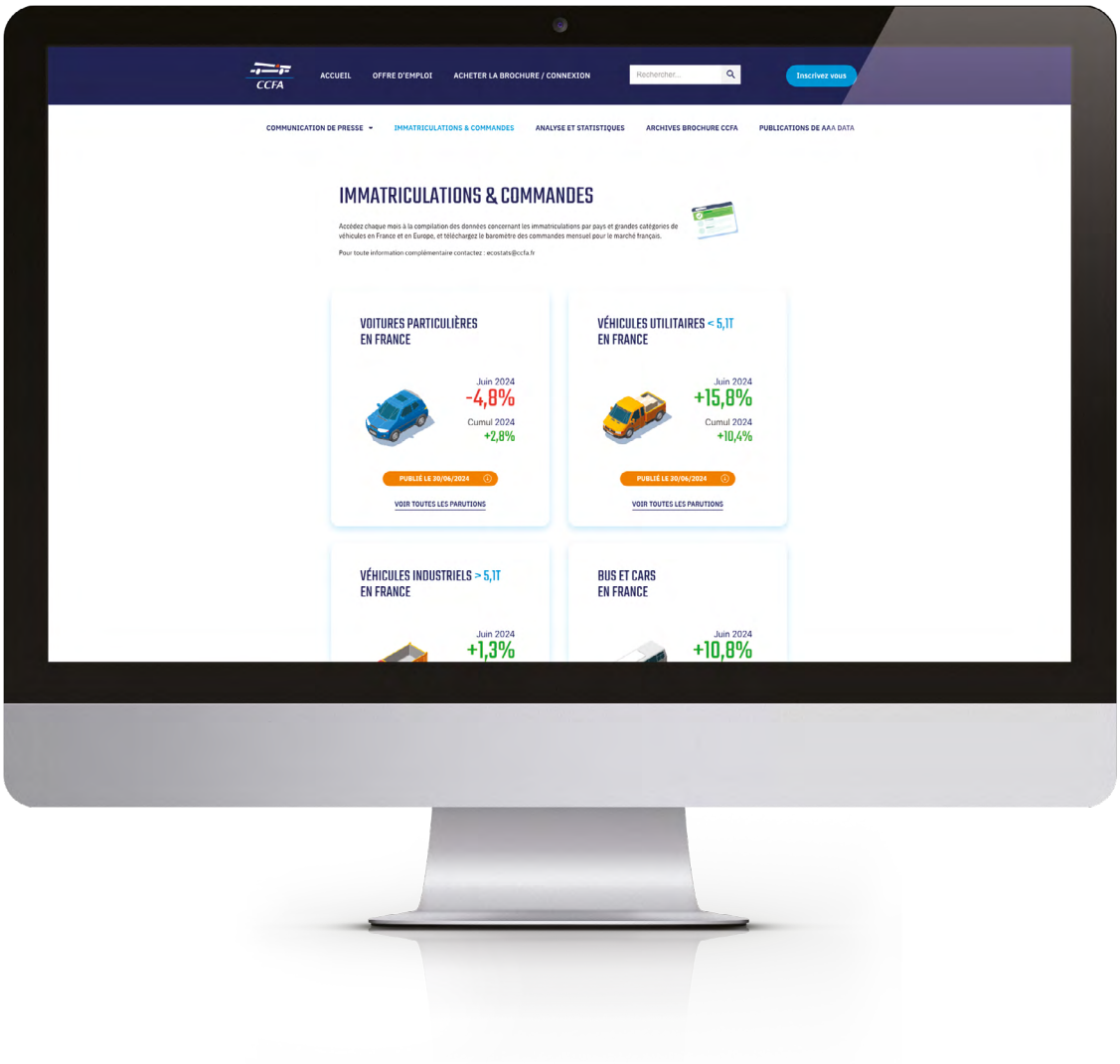


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