THE FRENCH AUTOMOTIVE INDUSTRY

→ ANALYSIS & STATISTICS 2025 EDITION

7.9 million — Vehicles produced by the Stellantis and Renault groups worldwide in 2024

17 % — Market share of electric cars in France in 2024

€5.8 billion — R&D expenditure for the automotive branch in France in 2023

€52 billion — Exports of automotive industrial products from France in 2024

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

86% — Share of domestic freight transport in France by road

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"The French Automotive Industry – Analysis and Statistics" can be downloaded from the CCFA website

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A WORD FROM THE PRESIDENT

In 2025, global automotive activity continues its recovery for a fourth consecutive year and has returned to the record levels seen at the end of the 2010s. Since 2020, the sector has faced a succession of shocks (COVID-19, semiconductor shortages, the war in Ukraine, and more recently the conflict in the Middle East), yet their combined effects – particularly inflation and higher energy prices – have been largely absorbed. Global production now exceeds 96 million units. However, this recovery masks clear regional divergences. Mature markets such as Europe remain well below pre-COVID levels, while emerging automotive markets, notably China and India, continue to grow strongly. Western Europe is still the most affected region, with volumes still around 25% below 2019 levels. Within this environment, excess production capacity has intensified, leading to fiercer competition across the industry. While automotive trade flows in North America and Europe remain largely dominated by intra-regional trade (75% of exchanges), this is less the case in Asia (30%), where China's rapidly expanding exports to other regions are reshaping global dynamics.

Looking ahead to 2026, diverging approaches to geopolitical risk, overcapacity, and the energy transition are expected to further widen these gaps. Ensuring coherent, realistic and economically viable electrification pathways will therefore be essential to meeting long-term decarbonisation objectives in transport.

In this environment, which continues to favour Asia, Renault and Stellantis, both firmly established in the "open" European continent, face strong competition. They continue to rely on their core base while expanding in other regions, particularly South America, India and Africa.

In 2024, the two groups produced 8 million light vehicles, i.e. approximately 8.6% of world automobile production.

The energy transition is underway and the popularity of electric vehicles is increasing. In Western Europe, the market share of battery-powered electric vehicles stabilised at 17% in 2024, with strong contrasts between Northern Europe (over 30%) and Southern Europe (under 10%). On the other hand, the share of hybrids (rechargeable and non-rechargeable), which are more affordable, rose again to reach 39%. The Renault and Stellantis groups have kept up with this market trend, with more launches of electric or hybrid versions.

Car mobility suffered the effects of lockdowns in 2020 as new habits such as working from home emerged. However, from 2021 onwards, commuting and leisure travel have resumed and are now only 4% below pre-COVID levels. In France, despite the development of public transport, road transport still accounted for 82% of personal journeys and 86% of tonnages transported for goods in 2024.

In this context of uncertainty and instability, Renault and Stellantis are continuing to seek the generation of value by applying sustainable development strategies. They must adapt to various changes in the value chain, both upstream and downstream, while remaining competitive and globally oriented.

- 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 2025, in France, government incentives and the expansion of charging infrastructure created favourable conditions for electric vehicle sales. Elsewhere, however, electrification has progressed more slowly, due either to a lack of similar measures or to schemes that are poorly adapted to local market conditions, particularly in lower-income countries in Southern and Eastern Europe. In this environment, tracking progress towards the targets set out in the "Green Deal" is becoming increasingly challenging, despite manufacturers' efforts to develop more affordable product offerings. Government support has also helped establish battery production facilities as part of a vertically integrated value chain, although competition in this area remains intense. The consistency of public support, along with France's competitiveness as a manufacturing location (energy prices and production taxes), are key factors in the emergence of this new industry. This will force manufacturers to adapt their strategies to secure future supplies of metals needed for electrification, in order to ensure the availability of raw materials and secure their supply. They will also need to reduce their carbon footprint linked with materials and components for vehicles and develop the circular economy in all its forms.
- The digital transition has led to increasing connectivity, services and driving assistance tools. Connectivity and active safety equipment is present in almost every new model released by manufacturers. The Renault and Stellantis groups are recruiting a number of specialist engineers and developing partnerships with other parties involved in these sectors in order to reinforce their expertise in these new areas of the automotive industry (electronics, software, artificial intelligence, etc.).
- The service transition is still emerging, mobilising numerous projects and research; new service offerings are being developed, but they still need a viable economic model.

Major geopolitical events (COVID-19, the Russia–Ukraine war, and the conflict in the Middle East) have affected the global economy, and in the automotive sector these impacts have been compounded by semiconductor shortages, instability in electrification support schemes, and the erosion of Europe's competitiveness – the core base of French manufacturers. Despite this uncertain and highly competitive environment, manufacturers must continue to invest to satisfy customers and adapt their industrial processes to manufacture electric vehicles, meet regulatory standards (environmental, for instance) and maintain a presence in fast-growing regions.

Total R&D spending in France held up during the COVID crisis, rising to almost 5.8 billion euros in 2023. According to the INPI (French Industrial Property Institute), four of the top ten patent applicants came from the automotive industry. In a challenging competitive environment, supported in part by the research tax credit scheme (CIR), the sector employs more than 22,000 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 all government efforts, competitiveness continues to lag behind the European average, which itself has significantly declined compared with other major automotive regions (China and North America). It is necessary to continue adapting the industrial base, to control electricity costs and pursue the reduction of manufacturing taxes to allow the sector to switch to the production of electric vehicles in a relatively short space of time. At European level, the European Commission must take into account the need to introduce flexibilities (for passenger cars as well as light commercial vehicles) and an appropriate level of local content requirements, in order to ensure a future automotive market aligned with demand and operating within a framework of fair competition. It will also be necessary to provide support for companies and employees as they deal with the transformation, by offering training and by making the sector more attractive.

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

We hope you enjoy reading!
JEAN-ANDRÉ BARBOSA

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 manage the association's assets and to examine and promote the economic and industrial interests of 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 2009, during the economic crisis, French car manufacturers and their suppliers established the PFA (Automotive Industry and Mobilities), which mission is to help strengthen the French automotive sector. In 2012, the Comité Technique Automobile (CTA) and its two councils, the Conseil de Standardisation Technique Automobile (CSTA) and the Conseil de Recherche Automobile (CRA), were established with the aim of structuring research and development. At the end of 2017, against the backdrop of the energy, digital and service transitions, the PFA entered a new phase with the following objectives: fostering innovation, promoting competitiveness across the sector, anticipating future needs in terms of jobs and skills, articulating the sector's common positions, coordinating the organisation of trade fairs, and managing sector communications.

Since 2022, the Manufacturers' Committee has been directly responsible for its research tasks (economics, statistics and transport) and relies primarily on the Automotive Industry and Mobilities Platform (PFA) for its communication and lobbying activities.

The other branches of the automotive industry, which are also members of the PFA, are grouped within other federations (FIEV – Federation of Vehicle Equipment Industries, FFC – French Federation of Bodywork, Industries and Services, FIM – Federation of Mechanical Industries, GPA – Automotive Plastics Group, Elanova – Centre for the Promotion and Excellence of Rubber).

Foreign brands, for their part, are represented by the International Chamber of the Automobile and Motorcycle Industry (CSIAM).

The downstream automotive sector is represented by MOBILIANS, which brings together the vehicle trade, fuel distribution, repair, recycling and automotive services sectors.

The Manufacturers' Committee and the PFA are involved in the work of the European Automobile Manufacturers' Association (ACEA), which is based in Brussels.

The Manufacturers' Committee is a member of the International Organisation of Motor Vehicle Manufacturers (OICA), which brings together all national trade associations worldwide. The PFA is also involved in its work.

1898 The Automobile Trade Association was founded

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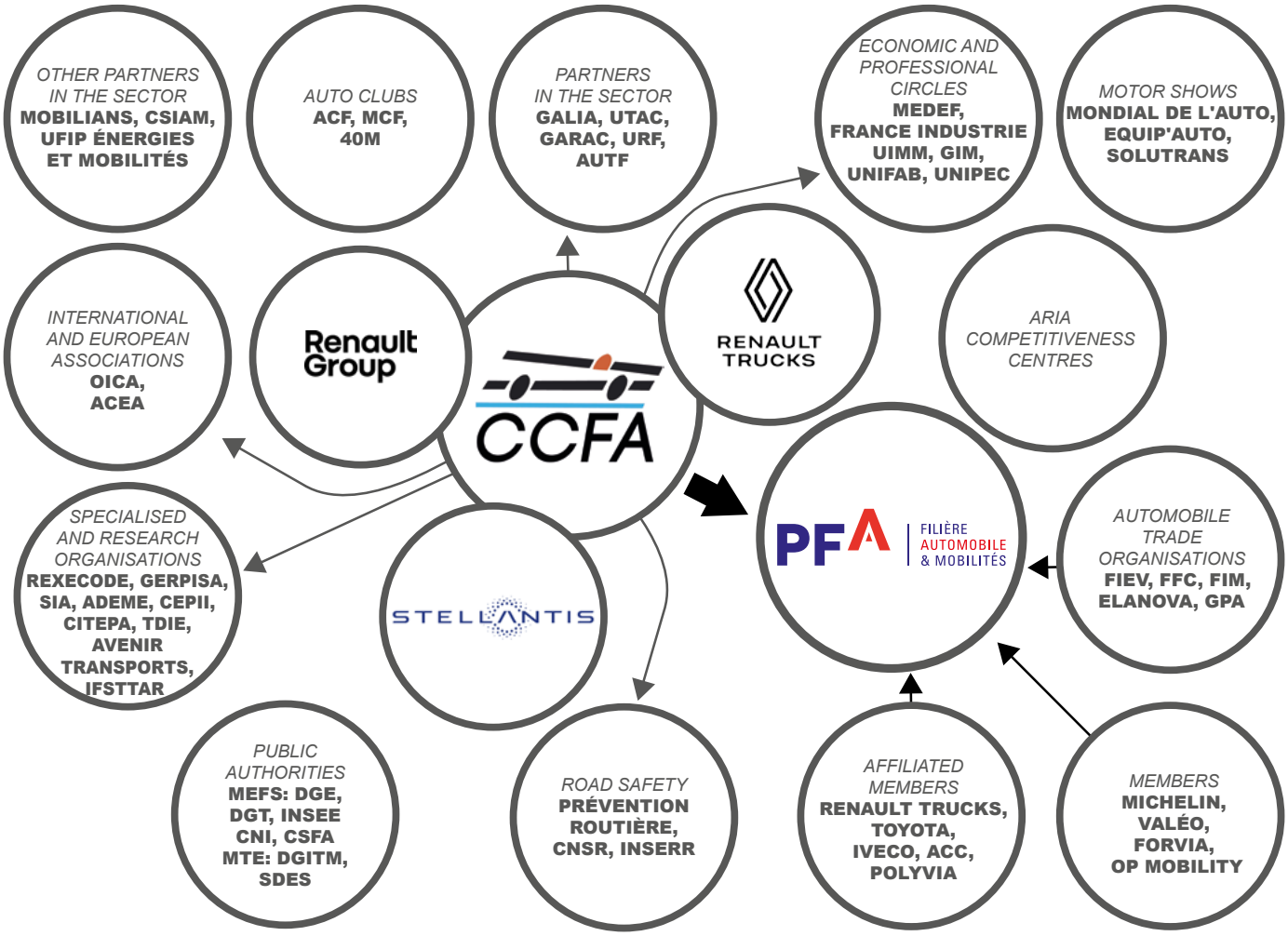
THE CCFA AND ITS PARTNERS IN 2024



► INTERNATIONAL AND EUROPEAN MANUFACTURERS' ASSOCIATIONS

OICA: International Organisation 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

► 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

GLOBAL AUTOMOTIVE INDUSTRY ACTIVITY, WHICH HAD REBOUNDED IN 2023, IS SLOWING IN 2024. DESPITE A 2.7% RISE IN THE GLOBAL MARKET, PRODUCTION IS DOWN BY 1% IN 2024.

In 2024, global production declined for the first time since the COVID crisis due to a fall in production in mature markets (Europe, the United States, Canada, South Korea, Japan) and a slowdown in growth in dynamic markets (China, India).

The global market, however, grew by more than 2% and returned to pre-crisis volumes in 2024. This is due to growth in European markets for the second consecutive year, following the sharp slowdown recorded in 2020 and 2022. However, this recovery has not been sufficient to return to 2019 volumes, which remain more than 10% below that level. In 2024, Western European markets are virtually stable, whilst those in Central and Eastern Europe are growing more strongly.

Outside Europe, the North American automotive market is growing in 2024, but has not yet returned to its pre-crisis level either. In Asia, all markets are growing in 2024, with the exception of Korea and Japan, and are exceeding their 2019 volumes. These contrasting performances across regions, along with geopolitical tensions, explain the performance of the Stellantis (excluding FCA) and Renault groups, whose deliveries to Europe are rising thanks to strong results in Central and Eastern Europe, but are falling outside Europe.

► KEY DATA (IN THOUSANDS)

	1997	2007	2019	2023	2024	Variation 2024/2023	Variation 2024/2019
World production: Stellantis (excluding FCA) (1), Renault group	**4,046**	**6,188**	**7,271**	**5,239**	**5,025**	**-4%**	**-31%**
Passenger cars	3,472	5,301	6,246	4,123	3,959	-4%	-37%
Light commercial vehicles	507	830	1,025	1,116	1,066	-5%	4%
Total light vehicles	3,979	6,131	7,271	5,239	5,025	-4%	-31%
Heavy trucks (2)	36	58	36	41	37	-10%	2%
Production in France: Stellantis (excluding FCA), Renault group	**2,525**	**2,573**	**1,885**	**1,212**	**1,063**	**-12%**	**-44%**
Passenger cars	2,235	2,165	1,375	735	622	-15%	-55%
Light commercial vehicles	258	352	510	477	442	-7%	-13%
Total light vehicles	2,493	2,518	1,885	1,212	1,063	-12%	-44%
Heavy trucks (2)	30	55	36	41	37	-10%	+2%
Deliveries outside France: Stellantis (excluding FCA), Renault Group, Renault Trucks	**2,822**	**4,697**	**5,604**	**3,754**	**3,710**	**-1%**	**-34%**
Passenger cars	2,526	4,110	4,826	2,942	2,877	-2%	-40%
Light commercial vehicles	276	549	757	787	812	+3%	+7%
Total light vehicles	2,802	4,659	5,583	3,728	3,689	-1%	-34%
Heavy trucks	20	38	21	26	22	-16%	3%
Deliveries outside the EU, EFTA, UK: Stellantis (excluding FCA), Renault Group, Renault Trucks	**-**	**-**	**2,088**	**1,272**	**1,180**	**-7%**	**-43%**
Passenger cars	-	-	1,903	1,050	977	-7%	-49%
Light commercial vehicles	-	-	178	215	198	-8%	+11%
Total light vehicles	-	-	2,081	1,265	1,174	-7%	-44%
Heavy trucks	-	-	7	7	6	-12%	-11%
Registrations in France: all makes	**2,068**	**2,629**	**2,756**	**2,209**	**2,155**	**-2%**	**-22%**
Passenger cars	1,713	2,110	2,214	1,775	1,718	-3%	-22%
Light commercial vehicles	313	461	480	379	382	1%	-20%
Total light vehicles	2,026	2,571	2,694	2,154	2,100	-2%	-22%
Heavy trucks	39.3	52.5	55.2	48.9	49.0	+0%	-11%
Coaches and buses	3.1	5.5	6.4	5.7	5.8	+2%	-10%
Registrations in 17 European countries: Stellantis, Renault group, Renault Trucks	**3,300**	**3,906**	**4,613**	**3,933**	**3,852**	**-2%**	**-16%**
Passenger cars	2,841	3,181	3,738	3,106	2,995	-4%	-20%
Light commercial vehicles	432	690	849	799	832	+4%	-2%
Total light vehicles	3,273	3,871	4,587	3,905	3,827	-2%	-17%
Heavy trucks	27	35	26	28	25	-11%	-3%

(1) The FCA Group, a member of Stellantis, produced 2.9 million vehicles worldwide in 2024.
(2) From 2012 onwards, the scope of commercial vehicles covers vehicles weighing 7 tonnes or more and is excluded from total production.

In 2024, global GDP grew by 3.2% and inflation, although still high, began to ease. Global car production fell by 1% in 2024 and remains at its pre-crisis level. The recovery in the automotive manufacturing sector last year enabled global markets to rebound.

Against this backdrop, the Renault and Stellantis groups (excluding FCA) saw their production fall by 4% in 2024 and their global deliveries decline by 1%. The decline in passenger car deliveries by more than 2% accounts for this fall, whilst deliveries of light commercial vehicles rose by 3%.

In 2024, as in 2023, it is mainly deliveries to the European region that are driving manufacturers' industrial activity. Across all vehicle types, deliveries to the EU, EFTA and UK regions rose by 2%, thanks to strong growth in light commercial vehicle deliveries (+7%), whilst those of passenger cars remained flat. Conversely, deliveries outside this region are down sharply in 2024 (-7%), for both passenger cars (-7%) and light commercial vehicles (-8%).

The market share of French light vehicle manufacturers now stands at 28.6% in Western Europe and 23.8% excluding France. For commercial vehicles, Renault Trucks' market share in Western Europe stood at 8.1% in 2024. In the smaller segment of vehicles over 16 tonnes, it stood at 9.1%.

-1% **Decline in deliveries outside France by French manufacturers in 2024**

THE SHARE OF GLOBAL VEHICLE PRODUCTION ACCOUNTED FOR BY THE STELLANTIS AND RENAULT GROUPS STANDS AT 8.6% IN 2024.

	Units	2019	2023	2024	Variation 2024/2023
Share of Stellantis (1) and the Renault Group (light vehicles)					
In France	(Percentage)	58.5%	55.0%	54.3%	-0.7 points
In Europe (17 countries) excluding France	(Percentage)	22.1%	24.5%	23.8%	-0.6 points
In Europe (17 countries)	(Percentage)	28.1%	29.4%	28.6%	-0.8 points
Share of Renault Trucks (new heavy trucks)					
In Europe (17 countries)	(Percentage)	8.2%	8.4%	8.1%	-0.3 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%	8.8%	8.6%	-0.3 points
French foreign automobile trade					
Exports	(In billions of euros)	51.7	60.6	56.4	- 6.9%
Imports	(In billions of euros)	66.9	87.3	81.5	- 6.6%
Balance	(In billions of euros)	-15.2	-26.7	-25.2	-
The weight of the automobile in foreign trade of goods					
Exports	(Percentage)	10.4%	10.1%	9.6%	-0.6 points
Imports	(Percentage)	11.6%	12.1%	11.9%	-0.3 points
Global data from the Stellantis and Renault groups					
Turnover	(In billions of euros)	130.3	241.9	213.1	- 11.9%
Investments	(In billions of euros)	5.7	9.7	8.5	- 12.4%
Workforce	(In thousands of people)	388	364	348	- 4.5%
The workforce in the automotive sector in France					
Automotive industry	(In thousands of people)	232	213	207	- 1.9%
As a share of manufacturing industry	(Percentage)	7%	7%	7%	-
Automotive-induced jobs (including automotive industry)	(In thousands of people)	2,219	2,368	2,371	+ 5.8%
As a share of employed labor force	(Percentage)	8%	8%	8%	-

(1) Excluding FCA before 2021.

In France, economic activity, which had slowed in 2023, slowed further in 2024 to +1.2%, compared with +1.4% in 2023, against a particularly unstable political backdrop that was not conducive to consumer spending or investment decisions.

The household savings rate remained at a particularly high level of 18% of gross disposable income. This did not encourage household spending on new cars, which fell by 5.2% against a backdrop of relatively stable prices and consequently an equally sharp drop in volumes (-5.8%).

Across the passenger car market, registrations fell by 3.2%, whilst registrations of light commercial vehicles rose by 0.7%. Taking all vehicles combined (including heavy vehicles), the French market contracted by 2.4% in 2024.

In France, Renault and Stellantis' market share for light vehicles stood at 54.3%, down 0.7 percentage points compared with 2023, and their local production also fell.

France's total automotive exports also fell by 6.9% in 2024 to €56.4 billion, of which €52.4 billion was for the industrial sector (excluding used vehicles). This represents 9.6% of total exports, compared with 10.1% the previous year. On the import side, these also followed the decline in demand, falling by 6.6% to €81.5 billion, representing 11.9% of total imports. The French automotive trade balance (-€25 billion) narrowed very slightly, improving by just €1.6 billion in 2024.

9.6% Share of the automotive sector in goods exports in 2024

GLOBAL VEHICLE PRODUCTION

In thousands	2023	2024	Variation 2024/2023	Base level 100 = 2019
EUROPE	**18,116**	**17,237**	**-4.9**	**80**
Western Europe	**11,160**	**10,243**	**-8.2**	**75**
Germany	4,109	4,069	-1.0	82
Belgium	332	240	-27.6	84
Spain	2,451	2,377	-3.0	84
France	1,505	1,358	-9.8	62
Italy	873	591	-32.3	65
Portugal	318	333	+4.5	96
United Kingdom	1,026	905	-11.8	66
Sweden*	277	268	-3.0	96
Central and Eastern Europe and Turkey	**6,956**	**6,994**	**+0.5**	**88**
CEECs that are EU members, including:	4,179	4,065	-2.7	93
Czech Republic	1,405	1,459	+3.9	102
Slovakia	1,080	993	-8.1	90
Russia	730	983	+34.7	57
Turkey	1,468	1,365	-7.0	93
AMERICA	**19,165**	**19,187**	**0.1**	**95**
USMCA	**16,195**	**16,107**	**-0.5**	**96**
Canada	1,554	1,343	-13.6	70
Mexico	4,002	4,203	+5.0	105
USA	10,639	10,562	-0.7	97
South America	**2,970**	**3,080**	**+3.7**	**92**
Brazil	2,325	2,550	+9.7	87
ASIA-OCEANIA	**55,020**	**54,908**	**-0.2**	**111**
ASEAN (1)	4,293	3,758	-12.5	91
China	30,161	31,282	+3.7	121
South Korea	4,244	4,127	-2.7	104
India	5,852	6,015	+2.8	133
Japan	8,999	8,235	-8.5	85
AFRICA	**1,171**	**1,190**	**+1.6**	**107**
TOTAL	**93,472**	**92,522**	**-1.0**	**100**

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

In 2024, global vehicle production declines for the first time since the COVID crisis and returns to its 2019 level of 92.5 million vehicles. This represents a 1% drop, following the 10% growth observed in 2023. This decline is due to the fall in European production (19% of global production), but also to stagnation in production on the American continent (21% of the total) and in Asia (60% of the total). Within these two major regions, however, trends are very mixed, with increases recorded in Mexico, South America, China and India, and decreases in the more mature markets (Canada, the United States, South Korea and Japan).

In Europe, production fell by 4.9% and remains 20% below its pre-crisis level. All 27 EU countries, except for Portugal, are affected by the decline. On the European continent, only Russia has seen a rebound in production, which had fallen sharply in 2022.

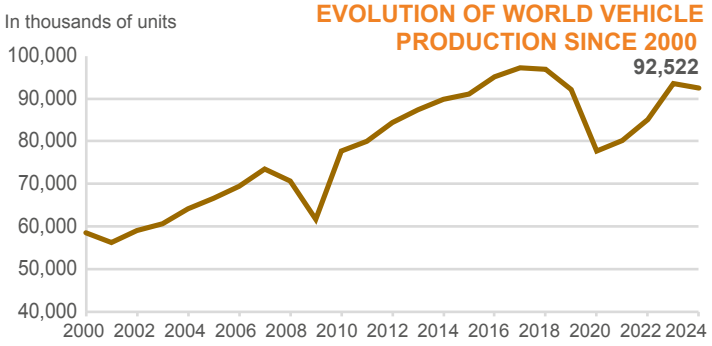
In the Americas, car production stagnated in 2024. It fell by 0.5% in North America but would have fallen further had it not been for Mexico, where production rose by 5%. In South America, it rose by 3.7% thanks to strong performance in Brazil, whilst it fell in Argentina.

In Asia, which now accounts for 60% of global car production, activity also stagnated in 2024 (-0.2%), but with sharp contrasts between countries. China has seen uninterrupted growth since 2020 and grew by 3.7% in 2024, to 31.3 million vehicles. Chinese production now exceeds its 2019 level by 20% and accounts for 34% of global production. India is experiencing a similar trend, with production growing by 2.8% in 2024 to exceed its pre-crisis level by 33%. Conversely, South Korea and Japan, which had rebounded in 2023, are in decline, by 2.7% and 8.5% respectively. Whilst South Korea is at the same production level as in 2019, Japan, for its part, is 15% below.

Finally, in Africa, the number of vehicles produced is set to rise by just 1.6% in 2024, still accounting for only 1.2 million vehicles, or around 1.3% of global production.

11% **Western Europe's share of global production in 2024**

EVOLUTION OF WORLD VEHICLE PRODUCTION SINCE 2000



In Europe, production fell by 4.9% in 2024, standing at 17.2 million vehicles, or just 18.6% of the total, down by one and a half percentage points compared with last year, by 4.4 percentage points compared with 2019 and by 12.4 percentage points compared with 2008. Western Europe, which now produces just 10.2 million vehicles – 11% of global production – accounts for 60% of the volume produced in Europe. Germany remains the largest vehicle producer with 4.1 million passenger cars, as commercial vehicles are no longer included in German statistics. It is followed by Spain, which produces 2.4 million units, including 1.9 million passenger cars. France, with 1.4 million vehicles produced (including 910,000 passenger cars), now trails the Czech Republic, which produced 1.5 million passenger cars in 2024, and is on a par with Turkey. Finally, production in the United Kingdom fell to 900,000 vehicles in 2024, below that of Slovakia (993,000 vehicles).

In the Americas, production stood at 19.2 million vehicles in 2024 (21% of the total), up 0.1%, compared with +8% in 2023. Production in the ACEUM region slowed very sharply in 2024 (-0.5%, following +9.5% in 2023), totalling 16.1 million vehicles. It declined in Canada (-13.6%) and the United States (-0.7%), but rose by 5% in Mexico, reaching 4.2 million vehicles. Production in the United States and Canada nevertheless accounts for 75% of production in the ACEUM region. In South America, production, which had stagnated in 2023, grew in 2024, thanks to the rebound in Brazilian production (+9.7%, following -1.9% in 2023), which accounts for 80% of the volume produced in the region.

Asia-Oceania produced 55 million vehicles in 2024, a level stable compared to 2023. China, the heavyweight of this region, continues to grow, with 31.3 million vehicles produced in 2024. Japan, which ranks second in Asia, produced 8.2 million vehicles in 2024, down by 8.5%. India has moved into third place ahead of South Korea since 2021. Its production stands at 6 million vehicles, up by 2.8% year-on-year (following a 7.2% increase in 2023). Like Japan, South Korea saw its production decline in 2024 to 3.7 million vehicles; these two countries, which accounted for more than half of Asia's production in 2008, now account for just 23%. Within ASEAN, Thailand and Indonesia are the largest producers, with 1.5 million and 1.2 million vehicles produced respectively, a sharp decline in 2024 following an initial fall in 2023.

Finally, production on the African continent remains low, with 1.2 million vehicles produced in 2024, mainly in Morocco and South Africa.

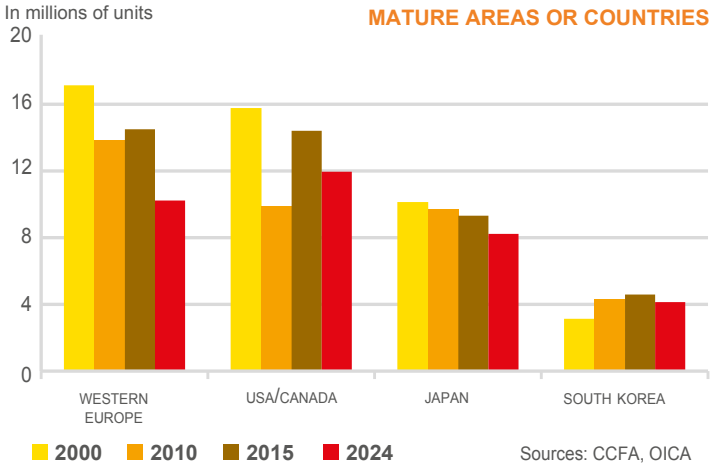
GLOBAL VEHICLE PRODUCTION

Since the early 2000s, global vehicle production has experienced contrasting phases of development. Between 2000 and 2010, it increased by 20 million vehicles, mainly due to the growth of the automotive industry in emerging markets such as Central and Eastern Europe and China. China, having increased its production tenfold, added 16 million vehicles over ten years. In Central and Eastern Europe and Turkey, production also doubled during the 2000s. Conversely, in mature markets, production contracted during this period, falling from 46 million to 38 million vehicles. By 2010, mature markets (Western Europe, Canada/United States, Japan and South Korea) accounted for just half of global production, compared with 80% a decade earlier.

Then, between 2010 and 2018, car production regained momentum across all regions, increasing by 20 million vehicles. Whilst mature markets produced 4 million more vehicles during this period, emerging markets increased their production 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.

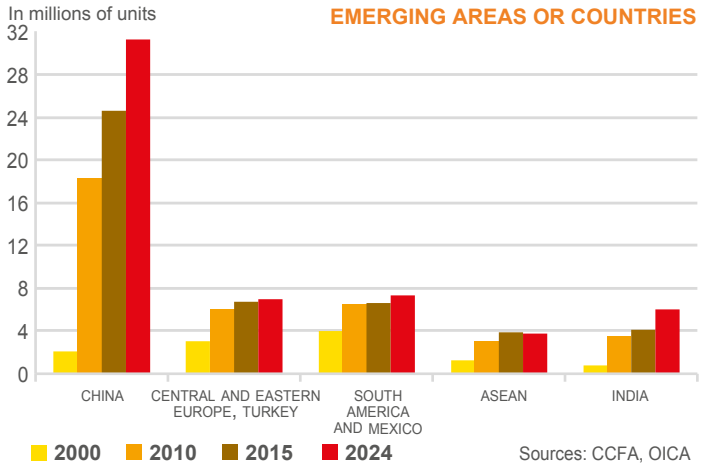
The slowdown in trade and growth in 2019, followed by the health crisis in 2020, caused global production to fall by 20 million units over two years. The semiconductor crisis is preventing a rebound in 2021–2023, particularly in mature markets, whilst emerging economies are holding their ground and continuing to gain market share. After a rebound in 2023, production falls again in 2024. It drops by 6% in advanced economies, whilst it rises by 2% in emerging economies, which now account for 60% of global production.

MATURE AREAS OR COUNTRIES



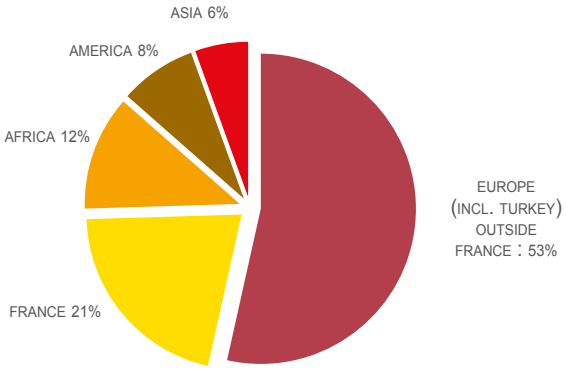
Sources: CCFA, OICA

EMERGING AREAS OR COUNTRIES



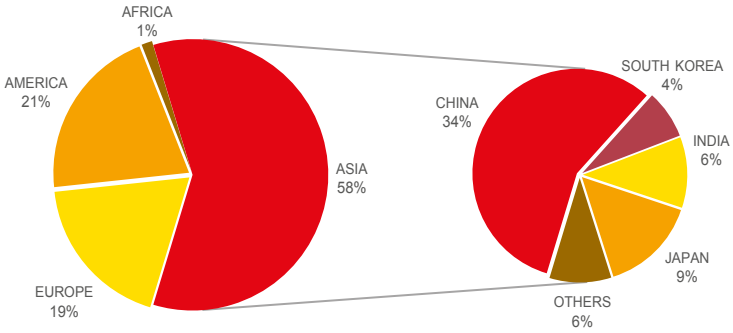
Sources: CCFA, OICA

GLOBAL PRODUCTION OF STELLANTIS (EXCLUDING FCA) AND RENAULT IN 2024



Source: CCFA

GLOBAL VEHICLE PRODUCTION IN 2024



Source: OICA

Production by the Renault and Stellantis groups (excluding FCA) is adapting to changes in the global geography of the automotive industry and is spread across five continents. However, 74% of production remains on the European continent, including in France, which accounts for just over a fifth of their global output. Africa accounts for 12% of the two groups' production (excluding FCA), whilst the Americas and Asia account for 8% and 6% respectively of their production in 2024.

These figures reflect the manufacturers' ongoing efforts at internationalisation over many years. Over the long term, this development has seen successes (Turkey, Morocco, South America) and areas yet to be established (India). Historically, manufacturers have also had to contend with intense local competition (China) or geopolitical events (Iran, Russia), which result in very significant fluctuations in production.

37% **Share of mature automotive markets in global vehicle production**

THE GLOBAL RANKING OF CAR MANUFACTURERS

In 2024, global vehicle production fell by 1%, standing at 92.5 million units. The world's top five manufacturers accounted for 41% of this total, a figure down by two percentage points compared with 2023. To strengthen their competitiveness, manufacturers are increasing their cooperation and partnerships in various forms. PSA merged with FCA in 2021 to form Stellantis, which remains in fourth place in the rankings in 2024 with 5.5 million vehicles produced. Renault retains its fifteenth place thanks to its numerous partnerships (Nissan, Mitsubishi, Mercedes, Renault Trucks, Geely, etc.).

In 2024, the ranking of the world's top three manufacturers remains unchanged from the previous four years. They have managed to retain their podium positions, despite a decline in production against a backdrop of a deteriorating global economic climate. The Toyota Group, which remains in the lead with 10.6 million vehicles produced, sees its production fall by 7.8% in 2024, following a strong 2023. It is followed by the Volkswagen Group with 8.9 million vehicles and a 3.8% decline in production volumes. Finally, Hyundai-Kia comes in third place with 7.2 million units produced and a 1.5% decline. Stellantis retains its fourth place despite a drop in production to 5.5 million units in 2024, just ahead of GM, whose production falls by 7.6%. The Renault Group is one of the few traditional manufacturers to maintain stable production in 2024.

Manufacturers from emerging markets are gradually climbing the rankings and are now in the top 10 with BYD and Geely. They account for 28% of global vehicle production, up from 24% last year.

28% **Share of manufacturers from emerging markets in global vehicle production in 2024**

► GLOBAL VEHICLE PRODUCTION IN 2024 (1)
(IN THOUSANDS)

Rank	Group	2023	2024	% Variation
1	TOYOTA	11,518	10,615	-7.8%
2	VOLKSWAGEN (2)	9,309	8,954	-3.8%
3	HYUNDAI-KIA	7,340	7,231	-1.5%
4	**STELLANTIS (FCA-PSA)**	**6,393**	**5,526**	**-13.6%**
5	GM (2)	5,886	5,438	-7.6%
6	FORD (2)	4,413	4,470	+1.3%
7	BYD	3,045	4,304	+41.3%
8	HONDA (2)	4,188	3,734	-10.8%
9	GEELY	2,790	3,337	+19.6%
10	SUZUKI	3,225	3,300	+2.3%
11	NISSAN (2)	3,444	3,144	-8.7%
12	CHERY	1,881	2,600	+38.2%
13	BMW	2,662	2,514	-5.6%
14	SAIC	2,805	2,430	-13.4%
15	**RENAULT**	**2,391**	**2,413**	**+0.9%**
16	MERCEDES-BENZ GROUP	2,503	2,364	-5.6%
17	CHANGAN	2,138	2,158	0.9%+
18	TESLA	1,846	1,773	-3.9%
19	BAIC	1,042	1,710	+64.1%
20	TATA	1,285	1,380	+7.4%
21	GREAT WALL	1,265	1,240	-2.0%
22	MAZDA	1,254	1,201	-4.2%
23	DONGFENG MOTOR	1,041	1,185	+13.9%
24	MITSUBISHI	1,024	945	-7.7%
25	SUBARU	959	938	-2.2%
26	FAW	721	819	+13.6%
27	GAC	924	763	-17.4%
28	ISUZU	771	666	-13.6%
29	MAHINDRA	529	600	+13.4%
30	IRAN KHODRO	559	530	-5.2%
31	LI AUTO INC	381	510	+33.9%
32	SERES	166	466	+181.1%
33	DAIMLER TRUCKS	526	460	-12.6%
34	ANHUI JAC AUTOMOTIVE	592	398	-32.9%
35	CHINA NATIONAL HEAVY DUTY TRUCK	330	351	+6.5%
36	SAIPA	414	345	-16.7%
37	LEAPMOTOR	144	291	+101.9%
38	**VOLVO-UD TRUCKS-RENAULT TRUCKS-MACK**	**252**	**226**	**-10.5%**
39	NIO	157	223	+41.9%
40	XPENG	142	190	+34.2%
41	PACCAR	204	185	-9.3%

Note: The production of Chinese manufacturers does not include that of joint ventures that assemble vehicles of other brands.
(1) Vehicles include passenger cars, light commercial vehicles, heavy trucks and coaches and buses. Double counting may exist between manufacturers.
(2) Production operations include activities in China.
Sources: OICA, annual reports, CCFA estimates July 2025

In 2024, the decline in global production, albeit moderate, deals a significant blow to traditional players from mature automotive markets. The only automotive groups experiencing growth are those from emerging markets, mostly Chinese. Ford, Suzuki and Renault are the only established players to see an increase in production in 2024.

The Toyota Group, which remains at the top of the rankings in 2024, sees its lead narrow as the Volkswagen Group moves into second place, due to a 7.8% drop in its production, compared with a 3.8% decline for its competitor, which produces 1.6 million fewer vehicles, totalling 8.9 million in 2024.

The Hyundai-Kia Group retains the third place it secured in 2020 and limits the decline in its production to -1.5%. Japanese manufacturers Honda and Nissan slip down the rankings, losing one and three places respectively to BYD (7th place) and Geely (12th place). Nissan drops from 8th to11th place with production down by 8.7%, whilst Suzuki is the only Japanese manufacturer to remain in the top 10, with production up by 2.3%.

Among European groups, Stellantis, which comprises fourteen brands, remains in fourth place—a position regained last year—but its production is down by 13.6% in 2024. For its part, the Renault Group recorded slight growth (+0.9%). Among German manufacturers, all three groups saw a decline in production, with Volkswagen down 3.8% and BMW and Mercedes-Benz down 5.6% respectively.

American manufacturers are facing a situation like that of other established automotive groups. General Motors' production is down by 7.6% and Tesla's by 3.9%, marking the first decline in the company's history. Only Ford is maintaining growth at 1.3%.

Chinese manufacturers continued to capitalise on the appeal of their electric and hybrid models outside China (5 million Chinese vehicles exported in 2024), particularly in Europe. BYD produced 4.3 million vehicles in 2024, 41% more than the previous year. Geely's production reached 3.3 million vehicles, up 19.6% compared to 2023. The Chery Group, meanwhile, recorded a 38% increase in production compared to last year. This amounted to 2.6 million vehicles, more than that of the SAIC Group, which saw its production decline in 2024 (-14%).

Indian manufacturer Tata continues to benefit from a growing Indian market and has increased its production by 7.4%. Among heavy vehicle manufacturers, the Volvo Group (including Renault Trucks) saw its production fall by 10%, following an increase in 2023. It stood at 226,000 vehicles in 2024.

PRODUCTION AND TRADE IN THE WORLD'S MAJOR AUTOMOTIVE HUBS

China — World's leading vehicle export market in 2024

China, which has been the world's leading vehicle producer since 2010, produces mainly to meet the needs of its domestic market. However, since 2019, a growing proportion of its vehicle production has been exported. The share of vehicle exports relative to production was just 4% in 2019. It rose to 8% in 2021, 12% in 2022 and reached 19% in 2024, representing nearly 6 million vehicles exported by China, which is the only region to have seen its export markets grow in that year. Conversely, imports have fallen due to the rise of local brands and account for just 2% of production in 2024. China is now a country with a structurally large surplus in vehicle trade, much like other Asian nations such as Japan and South Korea, whereas it had a deficit prior to 2021.

North America (the United States, Canada, Mexico) is now the world's second-largest vehicle-producing region, just ahead of the European Union. This production is primarily destined for the local market, with exports accounting for around 15% of the region's output. This market is also fuelled by significant import flows (31% of production in 2024).

The European Union, which has not included the United Kingdom since 2020, now ranks third among the major vehicle production regions. It benefits both from a strong domestic market, bolstered by imports (30% of production in 2024), and from vehicle exports outside its region (40% of production in 2024), although these have been declining since 2024, following an increase in 2023.

In Japan, half of production is exported (51% in 2024), whilst imports relative to local production remain low (4% in 2024).

► 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=2000)	in thousands	index (100=2000)	in thousands	index (100=2000)	in thousands	index (100=2000)
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
2023	14,312	84	16,195	133	8,999	93	30,161	165
2024	13,405	78	16,107	132	8,235	86	31,282	171
IMPORTATIONS (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%
2023	4,270	30%	4,793	30%	358	4%	799	3%
2024	3,966	30%	5,068	31%	325	4%	705	2%
EXPORTATIONS (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%
2023	5,656	40%	2,374	15%	4,423	49%	4,910	16%
2024	5,343	40%	2,192	14%	4,217	51%	5,860	19%

(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, developments in the automotive industry have been mixed across the three major automotive hubs. Over the past two decades, China has established itself as a major new 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 substantial, increased significantly over this period. Then, as in other regions, production slowed in 2019 and collapsed in 2020 due to the health crisis. Following a recovery in production in 2022–2023 (+6%, then +11%), it declined in 2024 (-6%). Vehicle exports, which had risen by around 10% in 2023, will fall by 6% in 2024. Imports will follow the same trend, falling by 7% in 2024.

In North America, production peaked in 2016 and subsequently declined until 2020. It rebounded in 2022 and 2023 (by around 9% each year) but will decline very slightly in 2024. Exports outside the region account for around 15% of production, whilst imports now account for 31% of production. This is 3 percentage points lower than in 2019, due to an increase in flows within the region, particularly from Mexico.

In Japan, vehicle production fell by 5% between 2000 and 2019, but remained above its 2010–2018 average, driven by the strength of the domestic market and exports (+8% between 2000 and 2019), boosted by the depreciation of the yen. Production and trade plummeted in 2020 and 2021, and only rebounded in 2023, without returning to their 2019 levels. In 2024, production fell again (-8%), as did exports (-5%) and imports (-9%).

In China, production increased tenfold between 2000 and 2010. It then rose by 41% between 2010 and 2019, whilst exports grew by 108% over the same period. The share of production exported stood at 4% in 2019. Between 2019 and 2024, Chinese production rose by 22%, but exports increased more than fivefold, whilst Chinese imports fell by 33%. In 2024, production rose by 4%, exports by 19% and imports fell by 12%. Chinese exports surpassed those of Japan in 2023 but, in 2024, they now exceed those of the 27-member European Union.

GLOBAL MARKETS

In 2024, the global automotive market grew by 2.7%, following a period marked first by the consequences of the health crisis (health restrictions, shortages, logistical problems), and then by those of the war in Ukraine (inflation, economic uncertainty). For the first time in three years, the market returned to its pre-crisis volumes, reaching 95.3 million units, 3.5% higher than the 2019 market. The market was supported by production capacity that had become available again, as well as replenished stock levels.

However, the situation varies by region. The European and US automotive markets, which have been hardest hit in recent years, have not returned to their 2019 volumes. They remain around 5 to 10% below that level. In Asia, registrations rose by 1.5% in 2024, but this was mainly due to China and India, whilst South Korea and Japan had a negative impact on the region.

In Europe, Western European markets are virtually stable, whilst those in the EU member states of Central and Eastern Europe are growing more strongly. Overall, they remain 10% below the registration volumes recorded in 2019. Other countries, including Turkey, Russia and the former CIS states, which had been particularly affected by the war in Ukraine, rebounded strongly in 2023 and 2024. The Turkish market stabilised in 2024, following a 55% increase in 2023. The Russian market continues the strong recovery that began in 2023 and has more than doubled its registrations in two years.

In the Americas, registrations rose by 4%, driven both by the ACEUM region (+3.2%) and by the markets of Central and South America, which recorded an 8% increase.

In Asia, sales rose by 1.5%, meaning that, following the rebound in 2023, volumes have now exceeded pre-crisis levels. Within the region, however, some markets have been in decline for the past two years. This is particularly the case for the Japanese and Korean markets, which fell by 7.5% and 6.7% respectively. Conversely, the Indian and Chinese markets are still growing in 2024, following a strong rebound in 2023. They now exceed their 2019 levels by more than 20%, and by as much as 37% in the case of India.

In Africa, registrations are stagnating in 2024 at 1.1 million vehicles. South Africa, the continent's largest market, is down by 3%, following three years of continuous growth, and has fallen below its 2019 level. In contrast, the Moroccan and Egyptian markets are growing by 9% and 12.6% respectively.

China, the world's largest market since 2009, now accounts for 33% of the total, followed by the United States (17%). India takes third place with 5.5% of the market, ahead of Japan, which remains in fourth place but with only 4.4 million units (4.6%). These top four global markets account for over 60% of the total.

China: 1/3 of the global market

	Passenger cars		Commercial vehicles		Total			Variation 2024/2023	Variation 2024/2019
	2023	2024	2023	2024	2023	2024			
	thousands	thousands	thousands	thousands	thousands	thousands	%	%	%
EUROPE	**14,999**	**15,644**	**2,943**	**3,057**	**17,942**	**18,701**	**19.6**	**+4.2**	**-10.7**
Western Europe	11,577	11,558	2,072	2,188	13,648	13,745	14.4	+0.7	-17.5
Central and Eastern Europe (EU member countries)	1,249	1,383	257	254	1,506	1,638	1.7	+8.7	-5.7
Other Central and Eastern European countries (Turkey, Russia, CIS)	2,151	2,680	612	612	2,763	3,292	3.5	+19.1	+31.3
AMERICA	**6,939**	**7,080**	**16,277**	**17,074**	**23,216**	**24,154**	**25.3**	**+4.0**	**-4.9**
USMCA (1)	3,971	3,874	15,217	15,928	19,188	19,802	20.8	+3.2	-4.9
USA	3,117	2,984	12,893	13,356	16,009	16,340	17.1	+2.1	-6.6
Central and South America	2,968	3,206	1,060	1,146	4,028	4,352	4.6	+8.0	-4.7
ASIA-OCEANIA	**42,727**	**44,043**	**7,914**	**7,363**	**50,642**	**51,406**	**53.9**	**+1.5**	**+15.4**
China	26,063	27,563	4,031	3,873	30,094	31,436	33.0	+4.5	+21.9
South Korea	1,489	1,440	260	193	1,750	1,633	1.7	-6.7	-9.0
India	4,102	4,275	979	952	5,080	5,227	5.5	+2.9	+36.9
Japan	3,993	3,725	786	696	4,779	4,421	4.6	-7.5	-14.9
ASEAN (2)	2,525	2,462	879	680	3,403	3,142	3.3	-7.7	-9.6
Other Asia-Oceania	2,968	3,206	1,060	1,146	4,028	4,352	4.6	+8.0	-4.7
AFRICA	**748**	**776**	**302**	**278**	**1,050**	**1,054**	**1.1**	**+0.3**	**-12.2**
TOTAL	**65,413**	**67,542**	**27,437**	**27,773**	**92,850**	**95,315**	**100.0**	**+2.7**	**+3.5**

(1) USMCA: The Canada-USA-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 Western Europe and North America, mature markets (56% of the total in 2005 to 35% in 2024), towards Asia (rising from 31% of the total to 54%). Recent crises have not altered the evolution of the global market structure. The share of mature markets continues to decline in favour of the BRICS and emerging economies.

In the United States, the market is set to grow by 2.1% to 16.3 million units in 2024, compared with 17.5 million in 2019. In Canada, the market is growing by 8.2% to 1.9 million units, followed by the Mexican market, which is growing for the third consecutive year and reaching a record level of 1.6 million units. In Central and South America, the Brazilian market, which is growing strongly in 2024 (+14%), accounts for over 60% of sales in this region in 2024 with 2.6 million units but remains around 5% below pre-crisis levels.

In Western Europe, the car market, which had rebounded in 2023, is stagnating in 2024, with contrasting trends across countries. The German market, which accounts for a quarter of the region's volume (3.2 million units), is down by 0.4% in 2024. The United Kingdom, in second place, is up by 2.6%, whilst France is down by 2.4% to 2.1 million units. The UK market (2.4 million units) remains larger than the French market thanks to passenger cars (1.9 million units compared with 1.7 million). Italy, in fourth place, is down by 0.3%, whilst the Spanish market grows by 8.1% to reach 1.2 million units.

The car markets of the EU member states in Central and Eastern Europe continued to grow strongly in 2024 (+8.7%). Poland, the region's largest market, recorded double-digit growth for the second consecutive year and now accounts for over 40% of registrations in the region.

In the Asia-Pacific region, the market excluding China declined by 2.8%. It was particularly weakened by falling sales in Japan (-7.5%), South Korea (-6.7%), as well as in Indonesia (-14%) and Thailand (-26%). The Indian market, which has surpassed Japan for the past two years, continues to grow in 2024 (+2.9%) and reaches 5.2 million units. The Chinese market sets a new sales record, with 31.4 million units sold, including 27.5 million passenger cars.

THE GLOBAL VEHICLE FLEET

In 2020, the global vehicle fleet (passenger cars and commercial vehicles) stood at 1.6 billion units, 75% of which were passenger cars. Asia-Pacific now accounts for 40% of the fleet, up from 34% in 2015, whilst the share of Europe and the Americas has fallen, from 31% to 27% and from 32% to 28% respectively. Africa's share remains stable at just 4%.

In 2015, new registrations accounted for 7% of the fleet and drove both the renewal of the existing fleet and its net growth. In 2020, with the collapse in sales and a larger fleet, the ratio fell by 2 percentage points and new registrations accounted for 5% of the fleet.

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

The US vehicle fleet, which was the largest in the world in 2015 with 264 million vehicles, has now been overtaken by China's, which stood at 318 million vehicles in 2020, compared with 289 million in the US. Japan's vehicle fleet retains its third place with 77 million units, but is stagnating, or even declining slightly compared to 2015. With 45.4 million vehicles, France still ranks eighth globally behind Russia (fourth), Germany, Brazil and India.

Global car density averaged 209 vehicles per 1,000 inhabitants in 2020 (+46% compared to 2005). Nevertheless, it varies from 49 vehicles in Africa to 722 in the USMCA region (United States, Canada, Mexico), via 107 in Asia (excluding Japan and South Korea), 179 for Central and South America, and over 550 for the European Union and the Japan-South Korea region. The density for Europe stands at 517.

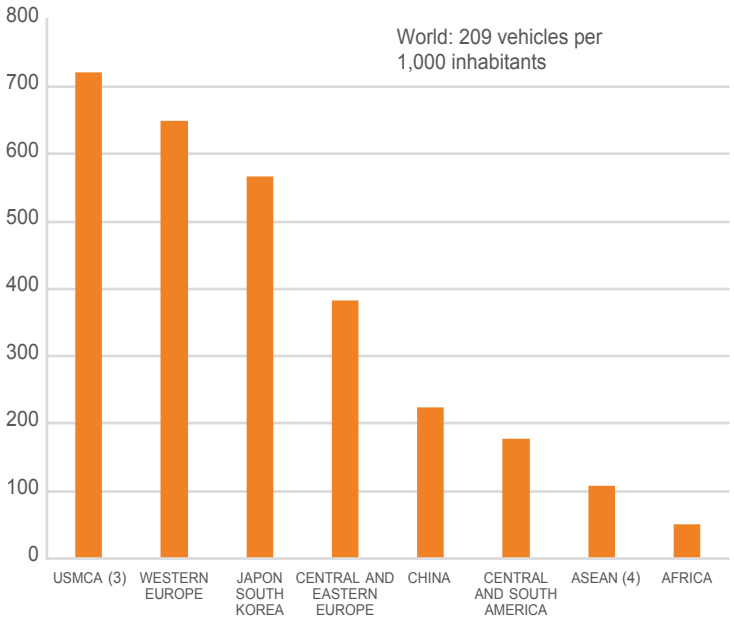
North Africa (Algeria, Egypt, Libya, Morocco and Tunisia), which is close to Europe, has seen strong fleet growth at an average rate of 6% per year since 2005. The fleet has thus grown from 10 million to 23 million units in 2020.

	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%**
USMCA (3)	324,763	360,912	2%	25%	23%
USA	264,194	289,037	2%	21%	18%
Central and South America	85,799	92,066	1%	7%	6%
ASIA-OCEANIA	**433,336**	**644,048**	**8%**	**34%**	**40%**
China	162,845	318,034	14%	13%	20%
South Korea	20,990	23,730	2%	2%	1%
India	28,860	45,687	10%	2%	3%
Japan	77,403	76,703	-0.2%	6%	5%
ASEAN (4)	54,158	71,045	6%	4%	4%
Other Asia-Oceania	89,080	108,848	4%	7%	7%
AFRICA	**49,978**	**60,557**	**4%**	**4%**	**4%**
TOTAL	**1,287,034**	**1,590,276**	**4%**	**100%**	**100%**

(1) EU-14, UK, EFTA.
(2) EU-12, Russia, Turkey and other Europe.
(3) USMCA: Canada, USA, Mexico,.
(4) ASEAN: Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam.
Source: OICA

1.6 billion Number of vehicles in the global fleet in 2020

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



In 2020, mature regions, which have fleet growth of between 1% and 2% per year, now account for less than 50% of the global fleet and 15% of the world's population. Since 2005, they have lost around 22 percentage points to emerging regions, whose fleets have grown by around 10% per year.

Within the European region, which accounts for 27% of the global fleet, the fleet is growing faster in the east than in the west, which is already highly motorised (see page 19). The number of vehicles per 1,000 inhabitants stands at 651 in Western Europe, compared with 381 in Central and Eastern Europe.

In the Americas, the Canada, United States and Mexico region (23% of the global fleet) is a mature market with a high motorisation rate (722 vehicles per 1,000 inhabitants), particularly in the United States where it reaches 860. Mexico has seen the highest growth in its fleet (+4% between 2010 and 2020). In contrast, Central and South America is an emerging region where the vehicle fleet has grown at a slow rate (2% on average between 2015 and 2020). Its share of the global fleet stands at just 6% in 2020 and its density is 179, ranging from 113 in Colombia to 311 in Argentina.

In Asia, Japan and South Korea (8% of the global fleet), mature markets, have motorisation rates of 612 and 458 respectively. In contrast, emerging countries, with larger populations, have low car density: 33 in India, 78 in Indonesia and 223 in China, although the latter has doubled in five years. Since 2005, almost the entire increase in the vehicle fleet has come from Asia – excluding Japan and South Korea. China has doubled its vehicle fleet over the last five years, rising from 163 million vehicles in 2015 to 318 million in 2020.

GLOBAL TRADE IN AUTOMOTIVE PRODUCTS

In 2024, global exports of goods totalled $24,456 billion, up 2% on 2023. Exports of automotive industry products, meanwhile, fell by 1% to $1,849 billion, following the sharp rise in the previous year. In 2024, automotive products accounted for 11.6% of total manufactured exports and 7.6% of all goods exported.

In addition to the macroeconomic context, global trade is influenced by multilateral agreements, signed under the auspices of the WTO, or bilateral/regional agreements, signed between regions, which are intended to ensure predictable and fair customs duties, thereby promoting global trade. National economic policies, such as subsidies to attract investors and relocate production (the Inflation Reduction Act in 2022), can also alter import and export flows.

In the major markets of the European Union and the USMCA (Mexico, the United States, Canada), the share of intra-regional trade in global trade is particularly high (around 75%).

► EXPORTS (FOB) / IMPORTS (CIF) OF THE MAJOR HUBS
(IN BILLIONS OF US DOLLARS)

Areas	World		
Countries	EXP.	IMP.	Balance
USA			
2010	99.7	189.8	-90.0
2019	139.3	317.7	-178.4
2023	156.1	382.6	-226.5
2024	149.1	396.1	-247.0
MEXICO			
2010	55.6	29,4	+26.2
2019	127.9	51.1	+76.7
2023	160.7	70.2	+90.5
2024	165.5	73.2	+92.3
CANADA			
2010	50.1	59.6	-9.5
2019	60.8	75.8	-15.1
2023	63.1	72.4	-9.3
2024	55.5	64.2	-8.7
EUROPEAN UNION (1)			
2010	546.4	426.9	+119.4
2019	701.4	572.1	+129.3
2023	835.1	684.7	+150.4
2024	803.2	658.4	+144.8
JAPAN			
2010	149.5	14.2	+135.3
2019	152.4	23.5	+128.9
2023	157.1	24.1	+133.0
2024	150.9	22.5	+128.5
SOUTH KOREA			
2010	54.5	8.0	+46.5
2019	65.2	16.8	+48.3
2023	93.7	22.2	+71.5
2024	93.2	20.5	+72.7
CHINA (EXCLUDING HONG-KONG)			
2010	28.0	53.0	-25.0
2019	59.3	80.0	-20.7
2023	170.1	72.4	+97.7
2024	191.3	64.2	+127.1

It is estimated that 50% of vehicles imported into the United States come from the USMCA region, with one-third from Mexico and 13% from Canada[1]. The Mexican Automotive Industry Association (AMIA) estimates that 9 out of 10 light vehicles manufactured in Mexico are exported, with 79% going to the United States and 8.5% to Canada.

Within the EU, intra-zone trade is also very high: 78% of imports, by value, of automotive products come from the EU and 63% of exports are destined for the zone (see page 13). Conversely, in Asia-Oceania, intra-regional trade is much lower, with markets that are largely closed to imported goods but highly outward-oriented for exports. In Japan, more than half of car production is destined for export, and 75% of these exports go outside the Asia-Oceania region.

In 2024, the European Union remains the leading exporter of automotive products, with $803 billion (43% of global exports). China, with €191 billion in automotive exports, now ranks second (+12% compared to 2023), ahead of Mexico ($165 billion), Japan ($150 billion) and the United States ($149 billion).

On the import side, the 27-country European Union imported $658 billion worth of automotive products in 2024, but the United States is the leading importer ($396 billion; +4% compared to 2023). Together with Canada and Mexico, the region imports $557 billion.

The US trade balance in automotive products is structurally in deficit, due to the dynamism of US consumption and the low penetration of American cars outside the United States, particularly in Europe. Consequently, US imports are twice as high as exports, and this gap is widening, with a US automotive deficit of $247 billion in 2024. In Canada, the balance, which was previously in surplus, turned negative from 2007 onwards, largely due to the role played by Mexico in trade within NAFTA. In 2024, Canada's deficit in automotive products stands at $9 billion.

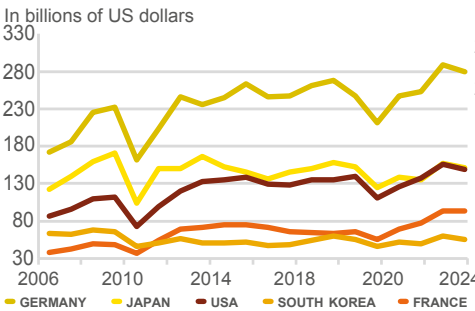
Conversely, Japan has a structurally positive automotive balance ($128.5 billion in 2024), linked to the sluggish growth and limited openness of its domestic market. Thus, Japanese vehicle exports are six times greater than imports, but the surplus has not grown over the past ten years and is even set to decline in 2024 (-3%). Similarly, South Korea also has an automotive surplus (US$73 billion in 2024) which is still growing, albeit slightly (+2%). Furthermore, the automotive surplus is growing in Mexico (US$92 billion; +2%), thanks to a rise in exports which have doubled over the past ten years.

Finally, it is in China that the automotive trade balance has improved the most. Between 2005 and 2019, China, having become the world's largest automotive market, initially saw its trade deficit increase sixfold. Then, in 2021, the balance turned positive (+$3 billion). Over three years, thanks to a rise in exports (+106%), coupled with a significant decline in imports (-29%), the balance then increased 41-fold to reach $127 billion in 2024.

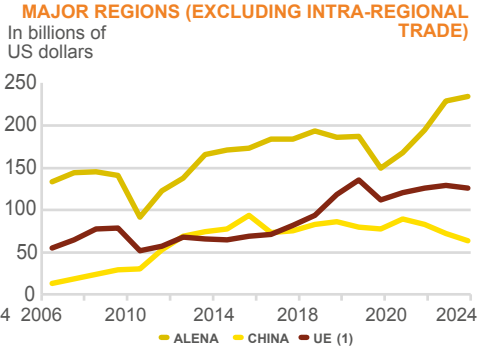
[1] USMCA Automotive Rules of Origin: Economic Impact and Operation, 2025 Report

$1.849 trillion Value of global exports of automotive industry products in 2024

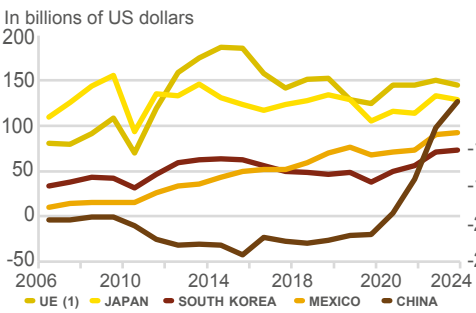
MAJOR EXPORTING COUNTRIES OF AUTOMOTIVE PRODUCTS



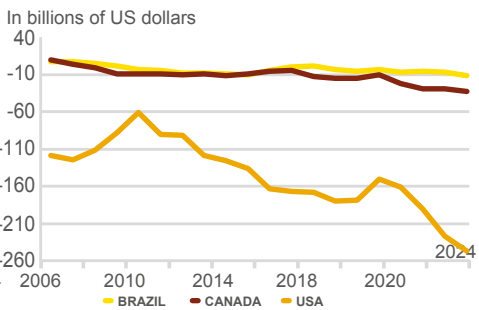
IMPORTS OF AUTOMOTIVE PRODUCTS FROM MAJOR REGIONS (EXCLUDING INTRA-REGIONAL TRADE)



EXCESS BALANCES IN AUTOMOTIVE PRODUCTS



DEFICIT BALANCES IN AUTOMOTIVE PRODUCTS



(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 (for all 4 graphs)

GLOBAL TRADE IN AUTOMOTIVE PRODUCTS

In 2024, the European Union remains the leading exporter of automotive products with $803 billion, accounting for 43% of global exports. Germany, with $280 billion, remains the leading exporter of automotive products in Europe, accounting for 35% of European exports, and globally, accounting for 15% of world exports. France accounted for 3% of global exports of automotive products in 2024 ($55 billion), compared with 7.6% in 2004.

Over 60% of exports from the 27-member European Union are destined for the EU. Exports of automotive products outside the EU are predominantly from Germany, which accounts for half of these non-EU exports (50% in 2024), ahead of Spain (6.5%) which, in 2024, overtook Italy (6%), followed by Belgium (5.6%) and France (4.9%). The six new entrants (Hungary, Poland, the Czech Republic, Romania, Slovakia and Slovenia) now account for 16% of these non-EU exports, compared with 10% in 2018.

The main destination countries for European automotive exports outside the EU-27 are the United States (19% of exports outside the EU), the United Kingdom (19%), China (11%) and Turkey (8%). EU exports to China accounted for 16% of the total in 2021.

On the import side, the 27-country European Union imported $658 billion worth of automotive products in 2024, 78% of which came from within the EU. Its imports from non-EU countries came mainly from China (20% of non-EU imports), Turkey (15%), Japan (13%) and the United Kingdom (13%). The United States (8%), South Korea (8%) and Morocco (5%) also account for a significant share of European imports. Furthermore, China's share is growing, as the country accounted for only 8% of non-EU imports in 2019.

The EU's automotive trade balance is structurally positive and increased following the UK's exit from the EU, as the UK has a trade deficit in this sector. Since then, on a like-for-like basis, the balance has tended to deteriorate. It is set to fall by 4% in 2024 to $145 billion.

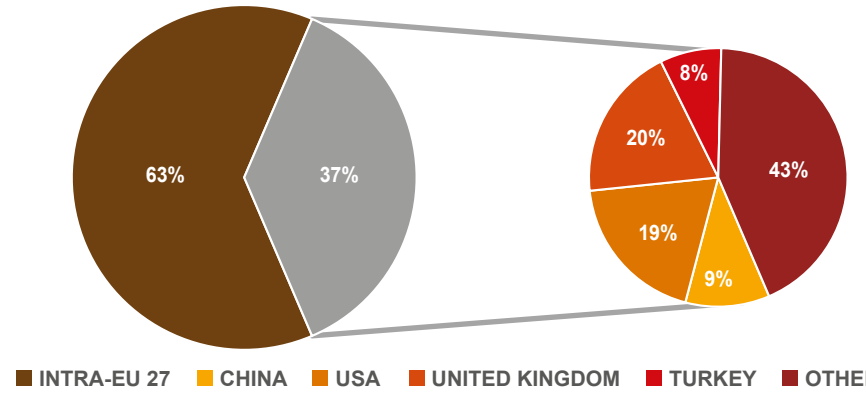
3% France's share of global exports of automotive industry products in 2024

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

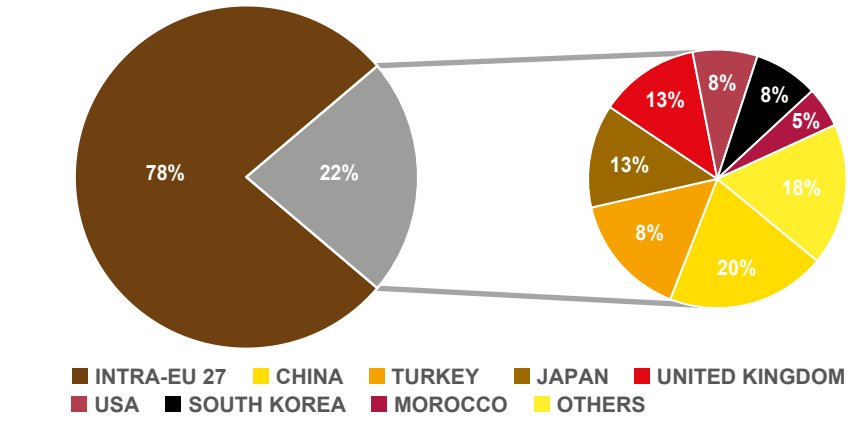
	Exports (FOB) / Imports (CIF) of countries		
Countries	**EXP.**	**IMP.**	**Balance**
GERMANY			
2010	203.2	85.0	+118.2
2019	247.6	137.3	+110.3
2023	288.5	157.8	+130.7
2024	279.7	146.5	+133.2
FRANCE			
2010	51.1	54.9	-3.8
2019	55.3	70.4	-15.1
2023	60.2	82.6	-22.4
2024	55.0	76.1	-21.1
SPAIN			
2010	44.8	31.6	+13.1
2019	56.8	46.8	+10.0
2023	67.4	52.3	+15.1
2024	64.7	52.6	+12.1
ITALY			
2010	29.8	40.3	-10.5
2019	40.0	47.0	-7.0
2023	49.1	57.2	-8.1
2024	43.1	55.5	-12.4
UNITED KINGDOM			
2010	38.8	52.6	-13.9
2019	51.8	73.5	-21.7
2023	50.6	88.2	-37.6
2024	49.4	86.4	-37.0

(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

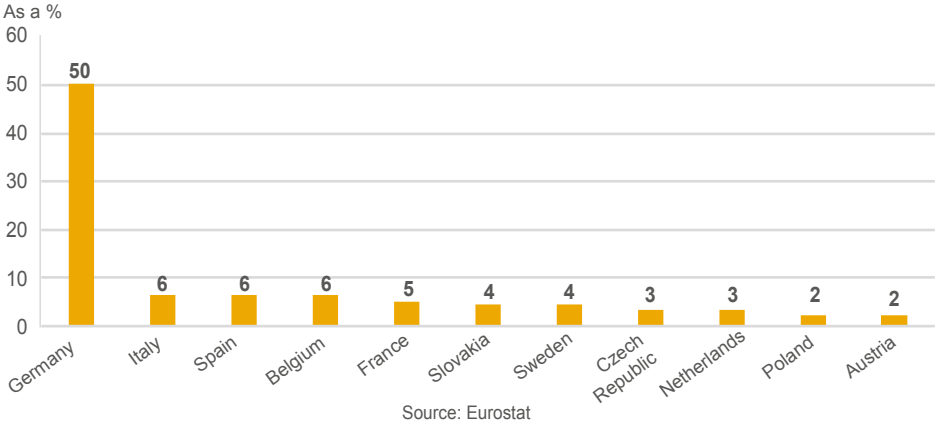
DESTINATION OF EU 27 AUTOMOTIVE EXPORTS IN 2024



ORIGIN OF EU 27 AUTOMOTIVE PRODUCT IMPORTS IN 2024



SHARE OF COUNTRIES IN EU ROAD VEHICLE EXPORTS TO NON-EU COUNTRIES IN 2024



Source: Eurostat

NEW PASSENGER CAR REGISTRATIONS BY COUNTRY

The passenger car market in Western Europe (90% of the European market) stagnated (-0.2%) in 2024 at around 11.6 million units. Despite the rebound seen last year, this was not enough to bring it back to its pre-health crisis level. Compared with 2019, it has in fact lost 2.7 million units (-20%), equivalent to the size of the German market, Europe's largest car market. This low level has persisted for five years, whereas during the previous crises of 1989 and 2009, the period below 12 million units did not exceed three years.

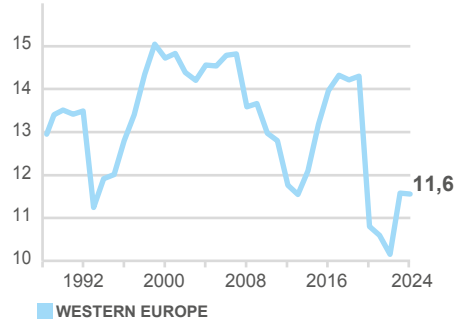
In 2024, the five largest European markets account for 78% of passenger car registrations in Western Europe. Germany, Europe's largest market, accounts for 24% of the total; when including neighbouring countries in Northern Europe, this figure rises to 42%. The German car market, which had held up better than its neighbours in 2022, recorded weaker growth in 2023 and is among the markets in decline (-1%) in 2024. The four other major European markets, which saw double-digit growth last year, are performing in contrasting ways. The UK market is growing by 2.6%, accounting for 17% of sales in Western Europe. France, now in third place (15% of registrations), is experiencing the sharpest decline (-3.2%) among the five countries. The Italian car market is down by 0.5% and ranks fourth with 13% of sales volume. Finally, Spain is seeing growth of 7.1%, driven by a recovery in household spending, but also by the need for vehicle replacement, particularly following the damage caused by flooding in the Valencia region. Its market has exceeded one million units for the first time since the COVID crisis. However, none of the five countries mentioned has returned to pre-pandemic market volumes. They remain around 20% below their 2019 levels.

In the smaller countries of Southern Europe (Greece, Portugal), markets are growing for the third consecutive year. This growth enables Greece to exceed its 2019 level by 20%, whilst Portugal remains 6% below that level. Finally, in the countries of Northern Europe, which were less affected by COVID in 2020 and weathered the subsequent years better, the market is set to decline in 2024, in some cases sharply (Finland, Sweden, Iceland), stagnate (Denmark) or increase slightly, following a fall in 2023 (+1.4% in Norway).

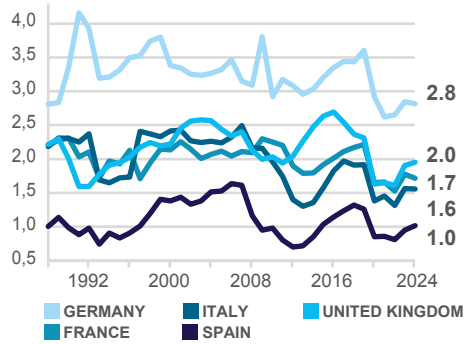
The Western European market comprises the markets of 18 countries: the 15 member states of the European Union prior to 2004, plus the countries of the European Free Trade Association (EFTA: Switzerland, Norway and Iceland). The United Kingdom, although it officially left the EU on 31 January 2020, remains included in this group. These countries share a similar environment and are subject to comparable economic rules.

► NEW PASSENGER CAR REGISTRATIONS IN WESTERN EUROPE

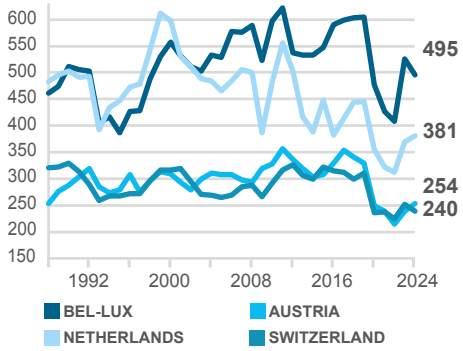
In millions of units



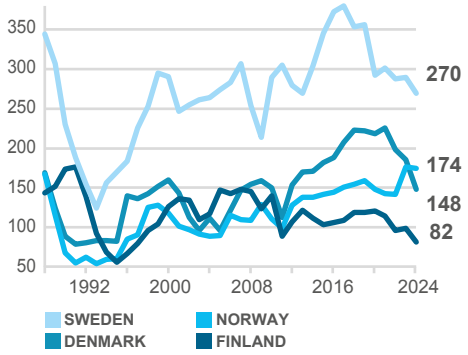
In millions of units



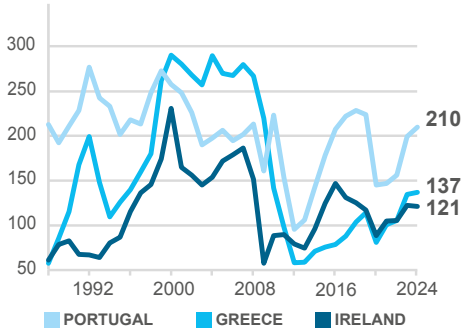
In thousands of units



In thousands of units



In thousands of units

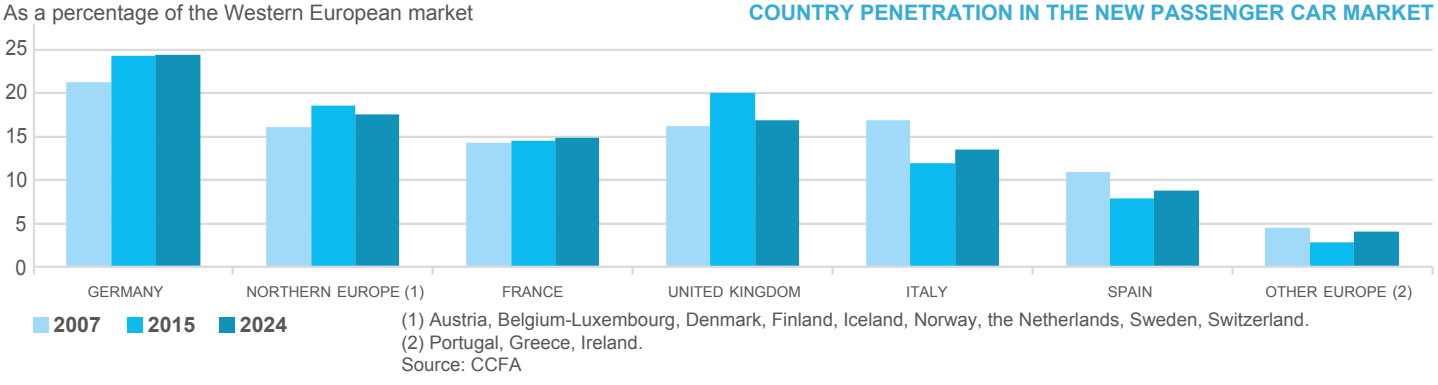


5th consecutive year

New passenger car registrations in Western Europe below 12 million units

As a percentage of the Western 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.
Source: CCFA

The market had experienced two severe crises prior to that of 2020. The first, in 1993, led to a decline in the European market of 2.2 million units in one year, to 11.3 million units, but the market rebounded the following year and experienced continuous growth until 1999. The second crisis, beginning in 2008, led to a continuous decline in the market until 2013 (-3.3 million units over six years), reaching 11.5 million units. In 2020, the economic shock following the health crisis was so severe that the market fell to its lowest level since 1985 and, against all expectations, continued to decline in 2021 and 2022; the decline amounts to 4.1 million units over three years. In 2024, the market stagnates, having rebounded in 2023. It now exceeds the lows of 1985 and 1993 but still falls short by more than 1.5 million units compared to its average level for the years 2009–2019, and by 2.7 million units compared to its peak (2019).

NEW PASSENGER CAR REGISTRATIONS BY GROUP

In 2024, the Renault Group and Stellantis, formed from the merger of the PSA and FCA groups in January 2021, account for 26% of the Western European passenger car market.

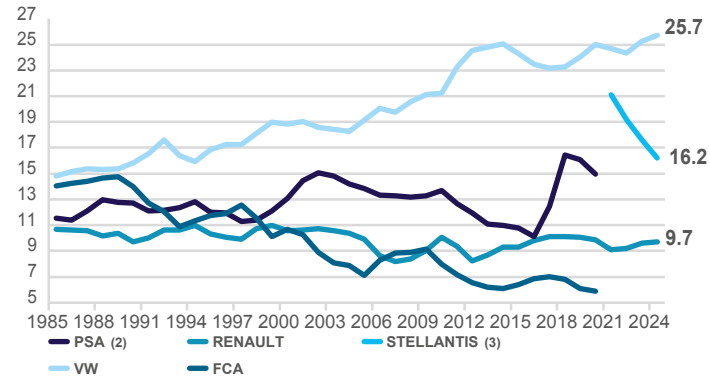
The Renault Group (9.7% market share) comprises the Renault (5.6%), Alpine and Dacia brands. The latter, which accounted for 0.5% of the market in 2007, has grown to reach 4.2% of the market in 2024. Stellantis (16.2% market share) comprises 14 brands. The four brands from the PSA Group are Peugeot (5.3%), Citroën (2.9%), Opel/Vauxhall (3.3%) and DS (0.3%). The other brands from the FCA Group are mainly Fiat/Abarth (2.6%) and Jeep (1.1%).

Other manufacturers traditionally present in Europe include the Volkswagen Group, which holds a 25.7% market share, as well as four other major generalist groups and two groups specialising in premium ranges. Each of these players has a market share of between 2% and 8%. The Chinese group Geely has also been a significant player in Europe since its acquisition of the Volvo Cars division in 2010, with a 3.3% market share in 2024.

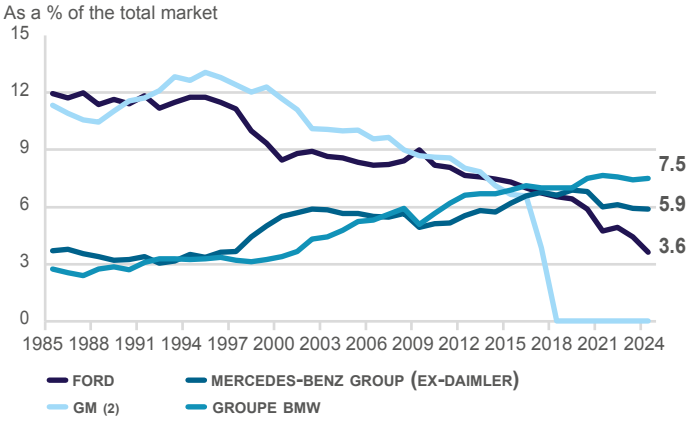
Finally, new players have been appearing on the European market in recent years. The Tesla brand really came into its own in 2019, quadrupling its sales in a single year; it secured a 3% market share in 2023, before falling back to 2.7% in 2024. In 2022, it was Chinese brands that made a significant breakthrough in Europe. They now account for 3% of sales in the Western European market.

► MARKET SHARE OF GROUPS (1) IN WESTERN EUROPE (EU 18)

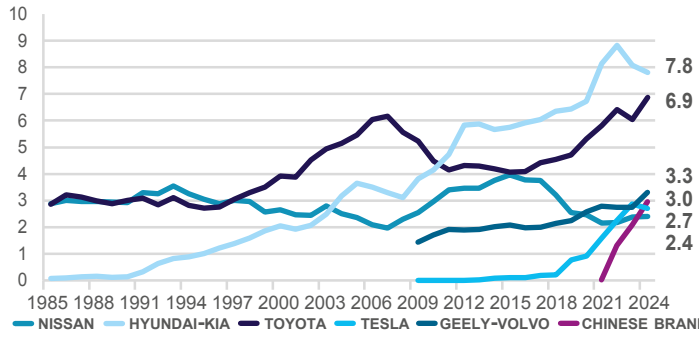
As a % of the total market



As a % of the total market



As a % of the total market



26% 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 76 for group definitions.
Source : CCFA

The Renault Group's market share exceeded 10% until 2004, due 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 is weighing on the group's performance. Nevertheless, by 2024, its market share will rise to 9.7%.

Stellantis's brands as a whole account for 16% of sales in Western Europe in 2024, down 1.4 percentage points compared with 2023. The group's mainstream brands, except for Peugeot, lose market share in 2024, whilst Jeep and Alfa Romeo, positioned in the more buoyant premium segment, see their market share stabilise.

Since 1995, the Volkswagen (VW) Group, with its five main brands (Audi, Cupra, Seat, Skoda, Volkswagen), has consolidated its position. It continues to gain market share in 2024, accounting for 25.7% of sales. Skoda is the brand gaining the most market share in 2024 (+0.6 percentage points) to 4.8%, compared with 5.3% for Audi (-0.6 percentage points) and 10.8% for Volkswagen (+0.1 percentage points).

The American Ford Group and its eponymous brand have halved their market share since the early 1990s. In 2024, it continues to decline to 3.6%.

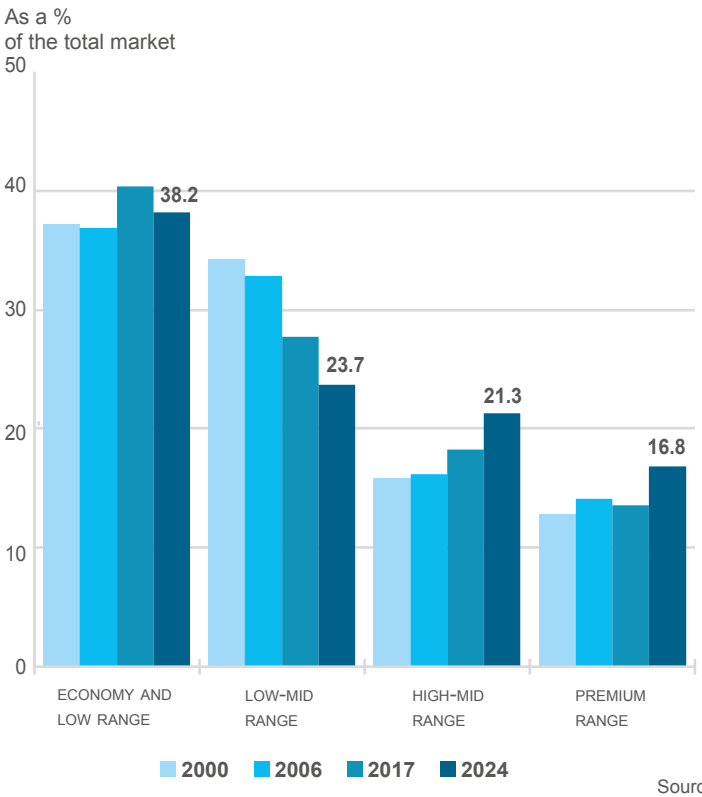
The German groups Daimler (now the Mercedes-Benz Group) and BMW, specialists in the premium segment and business sales, have pursued a strategy of expanding their ranges with smart and Mini respectively, to gain market share. Daimler peaked in 2019 at 6.9%, but today the Mercedes-Benz Group stands at 5.9% of the market, with smart declining from 2020 onwards, followed by Mercedes in 2021. The BMW Group, meanwhile, gained market share between 2019 and 2022, thanks to its premium BMW brand, but also thanks to Mini, which grew year on year. In 2024, however, Mini's market share fell sharply (-0.4 percentage points) to 1.2%, whilst BMW's rose (+0.4 percentage points), bringing the BMW Group's total market share to 7.5%.

The growth of Asian manufacturers in the European market since the mid-1990s has been very significant. The Japanese groups Nissan and Toyota, and the Korean group Hyundai-Kia, which accounted for 7% of the market in 1995, now account for 17% of sales. The Toyota group grew until 2007, then stagnated until 2016, before growing again to reach a record level of 6.4% in 2022. In 2024, its market share stands at 6.9%. The Hyundai-Kia group's market share, 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 high in 2022 (at 8.8%) but declined in 2023 and 2024 and has now fallen back below the 8% mark (7.8%). The Nissan Group, which had reached a record market share of 4% in 2015, has been in decline since then and accounts for 2.4% of the Western European market in 2024. The Chinese Geely Group has a presence in Europe through the Volvo brand, acquired in 2010, and holds a growing market share of 3.3% in 2024, up 0.5 percentage points year-on-year.

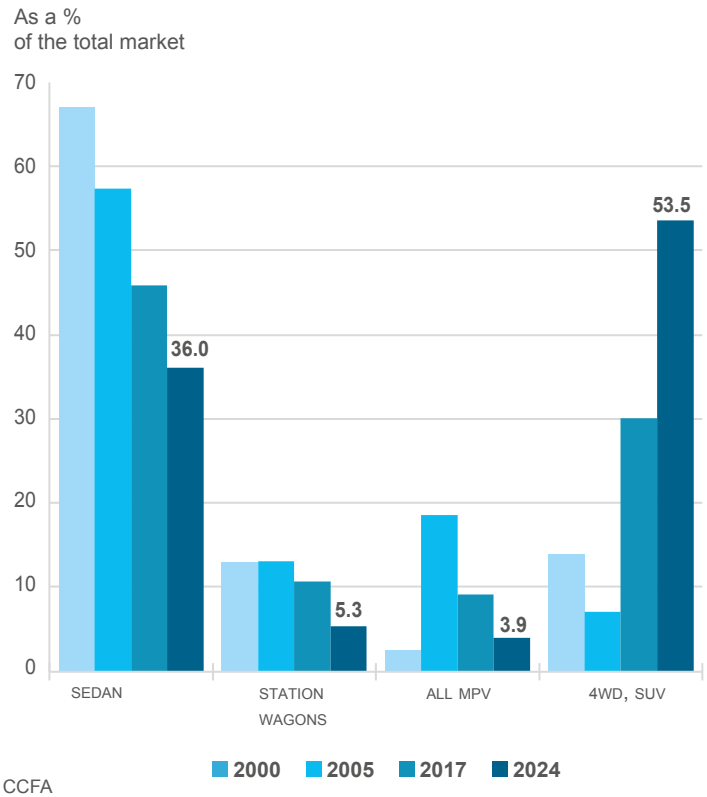
Finally, the European market has seen the emergence in recent years of new players who are beginning to occupy a significant position in Europe. In 2024, the Tesla brand accounts for 2.7% of the market, down 0.3 percentage points compared with 2023. Chinese groups, except for Geely, which is already well established through its European brand Volvo, emerged in 2022 and have continued to expand ever since, with more than a dozen brands now present in the Western European market. They have gained 1 percentage point of market share in two years and now account for 3% of the market, led by the SAIC group with the MG brand (2% of the market), followed at a distance by BYD.

NEW PASSENGER CARS BY SEGMENT, BODY STYLE 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 2024, the market shares of the top fifteen passenger car models sold in Europe (extended to include the EFTA and the UK) stood at 22.5%. This figure has remained stable since 2022, following a sharp decline (from 40% in 2000), driven by a diversification of the product range and an increase in the number of models. The two best-selling models are the Dacia Sandero and the Renault Clio, both of which belong to the economy and lower segments. Furthermore, four Stellantis models feature among the top fifteen registered in Europe, and these also belong to the economy and lower segments.

In Western Europe, the economy and lower segments continue to dominate the market, accounting for 38% of registrations in 2024. The lower mid-range segment, which features many saloons, accounts for 24% of registrations. Since the COVID-19 pandemic, the lower segments have been much more affected by the decline in market volume than the upper and luxury segments, which are less sensitive to crises. Traditionally, there are differences between Northern Europe, which is more oriented towards the upper segments and estate cars, and Southern Europe, which favours the lower and lower-mid segments. Despite the success of the lower-end segment and saloons in Germany and the UK during the 2009 crisis, the market shares of the lower-end segment in these two countries remain 5 to 11 percentage points below the European average, whilst those of the upper-mid, upper and luxury segments remain above it.

The body styles of new cars have also evolved over the last twenty years in Western Europe. The market share of saloons continues to decline (36% in 2024, compared with 67% in 2000) in favour of the SUV category, which benefits from a varied and growing range of models. It now accounts for 53% of the market, compared with 14% in 2000. Their market share even exceeds 50% in Spain, Ireland, Sweden and Norway. It reaches 60% in the United Kingdom. Conversely, it is relatively lower in Germany, accounting for 41% of sales. In 2024, thirteen of the twenty-five best-selling models in Europe belong to this category

The technical characteristics of vehicles (engine capacity, power) have also evolved, thanks to engine downsizing (achieving the same power output with a smaller engine 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 market share by diesel do not appear to be altering the evolution of the market structure. Sales by model range and body style follow the trends of previous years.

10 of the 15 best-selling models in Europe belonged to the economy and lower segments in 2024

► RANKING OF THE 25 BEST-SELLING MODELS IN WESTERN EUROPE IN 2024

Models	% of the European market
DACIA SANDERO	2.1%
RENAULT CLIO	1.7%
VOLKSWAGEN GOLF	1.7%
TESLA MODEL Y	1.6%
VOLKSWAGEN T-ROC	1.6%
PEUGEOT 208	1.5%
VOLKSWAGEN TIGUAN	1.5%
TOYOTA YARIS CROSS	1.5%
TOYOTA YARIS	1.4%
SKODA OCTAVIA	1.4%
DACIA DUSTER	1.4%
KIA SPORTAGE	1.3%
OPEL CORSA	1.3%
PEUGEOT 2008	1.3%
CITROEN C3	1.2%
HYUNDAI TUCSON	1.2%
FORD PUMA	1.2%
RENAULT CAPTUR	1.1%
NISSAN QASHQAI	1.1%
VOLKSWAGEN POLO	1.0%
TOYOTA COROLLA	1.0%
TOYOTA C-HR	0.9%
FIAT PANDA	0.9%
BMW X1	0.9%
VOLKSWAGEN T-CROSS	0.9%

NEW PASSENGER CARS BY ENERGY

In 2024, the Western European car market contracted by 0.2% to 11.6 million units. Against this gloomy backdrop, all powertrain types saw a decline, except for non-rechargeable hybrids. Hybrid powertrains are now the most sought-after, with a 39% market share, compared to 32% for petrol. This is due to the success of non-plug-in hybrids, which gained five percentage points of market share in a year and accounted for 31% of total sales (compared with 8% for plug-in hybrids). Sales of non-plug-in hybrids rose by 19% to reach 3.6 million units in 2024. Sales of electric cars, meanwhile, are struggling to take off. Whilst they were expected to accelerate in line with the 2025 targets for average CO_2 emissions in Europe, they fell by 1.4% in 2024. With 1.9 million units sold, the market share of electric cars contracted from 16.9% in 2023 to 16.7% in 2024.

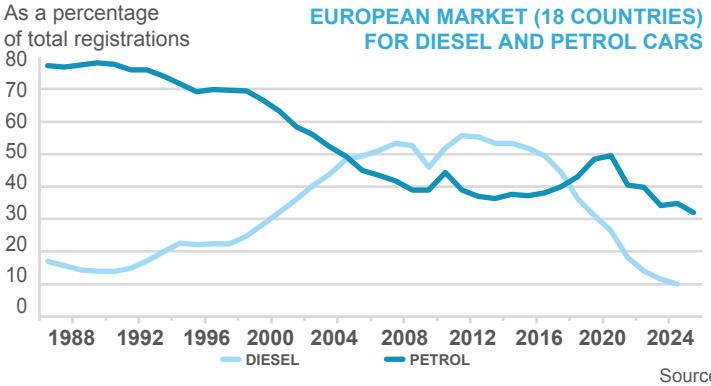
The share of new cars fitted with a diesel engine continues to decline and stood at just 10% in 2024, compared with 55% in 2012. The share of petrol engines also lost two percentage points of market share, falling to 32%. For the first time, petrol is no longer the leading engine type in Western Europe. It ranks second, just behind hybrid engines.

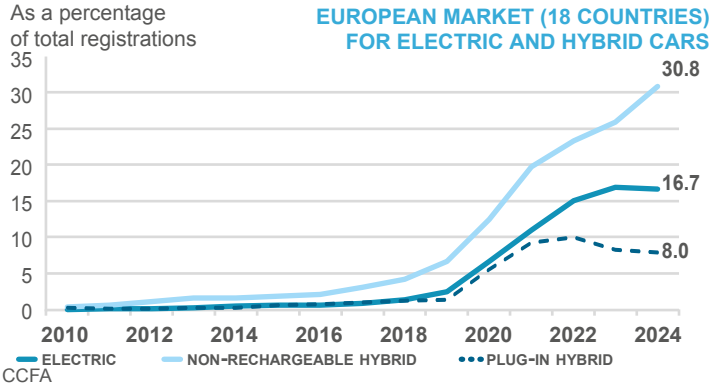
In Eastern Europe, the share of petrol engines fell by 4.5 percentage points to 41%. It remains in first place, just ahead of hybrid engines, which account for 39% of sales – the same market share as in Western Europe. Non-rechargeable hybrids powertrains grew by 29% and account for 36% of sales, a higher level than in Western European markets. The decline in diesel's market share continues (13% in 2024). Finally, the electric car market is the only one to see a decline in volume in this region. Its market share stands at 4.3%, down from 4.8% in 2023.

17% **Stagnation in the market share of electric vehicles in Western Europe in 2024**

► NEW PASSENGER CARS BY ENERGY IN EUROPE IN 2024 (AS A PERCENTAGE OF TOTAL REGISTRATIONS)

	Diesel	Petrol	Hybrid	Non-rechargeable hybrid	Plug-in hybrid	Electric
GERMANY	17%	35%	34%	27%	7%	14%
AUSTRIA	17%	33%	32%	25%	7%	18%
BELGIUM	5%	42%	24%	9%	15%	28%
DENMARK	4%	23%	21%	17%	4%	52%
SPAIN	9%	37%	44%	39%	6%	6%
FINLAND	5%	15%	50%	30%	20%	30%
FRANCE	7%	30%	43%	34%	9%	17%
GREECE	7%	36%	48%	42%	6%	6%
IRELAND	23%	30%	32%	22%	10%	14%
ITALY	14%	29%	43%	40%	3%	4%
LUXEMBOURG	12%	30%	31%	22%	8%	27%
NETHERLANDS	1%	22%	42%	28%	14%	35%
PORTUGAL	9%	34%	30%	17%	14%	20%
UNITED KINGDOM	3%	34%	44%	35%	9%	20%
SWEDEN	7%	23%	34%	10%	23%	35%
ICELAND	22%	15%	37%	20%	16%	26%
NORWAY	2%	1%	8%	5%	3%	89%
SWITZERLAND	9%	29%	42%	34%	9%	19%
TOTAL 18 COUNTRIES	10%	32%	39%	31%	8%	17%
NEW EU COUNTRIES (11 COUNTRIES)	13%	41%	39%	36%	2%	4%





Source: CCFA

The evolution of powertrains in Europe is largely influenced by the tightening of regulations and taxation in each country, particularly in relation to the CO_2 emission reduction targets for new vehicles set by the European Union. In recent years, this trend has also been strongly influenced by changes to purchase tax policies designed to favour lower-emission vehicles, particularly electric ones (bonus/malus schemes, conversion incentives).

The target of ending sales of internal combustion engine vehicles by 2035 remains a key driver of the European market's electrification, even though the interim target of a 15% reduction in CO_2 emissions between 2021 and 2025 was not sufficient to stimulate the market in 2024. The withdrawal of certain financial incentives for electric vehicles, notably in Germany, as well as the price of electric vehicles and the lack of charging infrastructure, have held back sales, even though these need to reach between 20% and 24% of the market to meet the 2025 targets.

In 2024, the average penetration rate of electric cars in Western Europe remained stable at around 17%, but with significant disparities between countries. Northern European countries are seeing penetration rates approaching or exceeding 30%. In Belgium (28%), Denmark (52%), the Netherlands (35%) and Norway (89%), the market share of electric cars continued to rise in 2024, whilst it fell in Finland (30%) and Sweden (35%). In Southern European countries, the market share of electric vehicles is below the European average and changed little in 2024 (6% in Spain and Greece, 4% in Italy). Only Portugal, which has a good number of charging points relative to its road network, is an exception, with a penetration rate of 20%, up 2 percentage points from 2023. In countries close to the European Union average, the market share of electric cars fell in 2024 (Germany, Austria, Ireland) or stagnated (France). Only the United Kingdom saw the market share of electric vehicles increase. These results confirm the link, highlighted in an ACEA study, between the market share of alternative fuels and GDP per capita.

Regarding infrastructure development, the European Commission proposed, as part of the automotive action plan launched in early 2025, to fund technical assistance to help implement the AFIR (Alternative Fuel Infrastructure Regulation), which sets targets for the roll-out of charging infrastructure across Europe.

Today, the number of charging points remains insufficient and is very unevenly distributed across Europe. By the end of 2024, the European Union had 882,000 publicly accessible charging points, but more than half (57%) were in just three countries: the Netherlands (21%), Germany (18%) and France (18%), even though these countries cover only 20% of the territory. In 2024, 250,000 new charging points were installed in Europe, representing an acceleration compared to 2023 (153,000 in 2023), but according to ACEA, an annual installation rate three to eight times higher than the current rate would be needed to reach the 8.8 million charging points required by 2030.

THE PASSENGER CAR FLEET IN EUROPE

As of 31 December 2023, the passenger car fleet in the wider European market (EU-27 + EFTA + UK + Turkey) stood at 309 million units, up 1.7% year-on-year. However, this figure is lower than that published last year by ACEA, due to a change in how the fleet is counted in Poland, which resulted in the removal of more than 5 million vehicles.

In Western Europe, where car density is high (an average of 546 cars per 1,000 inhabitants), the fleet grew by 1.3%. In the new EU member states, where car ownership rates are generally lower (an average of 496 per 1,000 inhabitants, excluding Turkey and after adjusting for the Polish fleet), the growth rate of the fleet stood at 3.1%. By the end of 2023, this region accounted for 20% of the European fleet, and several countries now have car ownership rates on a par with those of Western European countries.

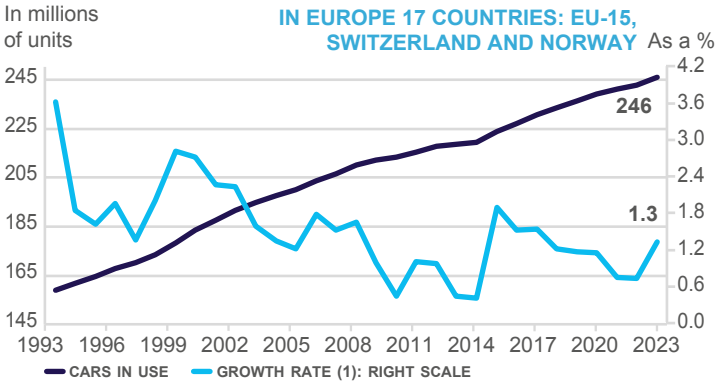
The composition of the European vehicle fleet continues to evolve, with a decline in the share of diesel vehicles, which stands at 38% in Western Europe and 41% in the EU member states of Central and Eastern Europe.

The uptake of electric cars in the European fleet remains very slow, with only 1.8% of the fleet consisting of fully electric cars. However, the situation varies significantly between Northern Europe, where the share of electric cars in the fleet reaches (Luxembourg, the Netherlands) or exceeds (Denmark, Sweden, Norway) 5%, and Southern or Eastern Europe, where it remains close to zero. In Norway, one in four cars on the road is now an electric car.

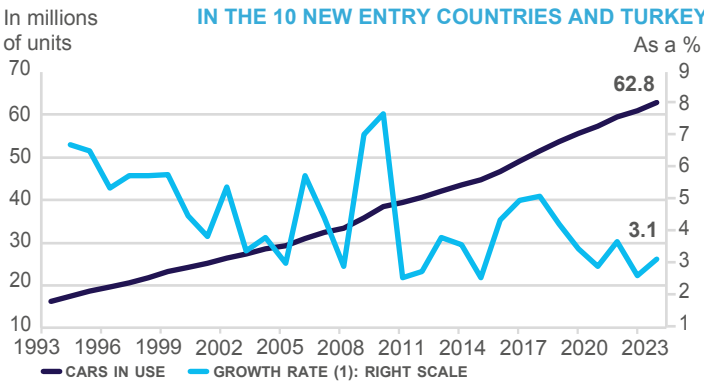
The proportion of cars over 10 years old in the Western European fleet continues to rise, reaching 52% as of 31 December 2023, with significant disparities between countries and geographical areas. In Southern European countries, this percentage stands at around 60% and is even higher in Central and Eastern European EU member states (over 70%).

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

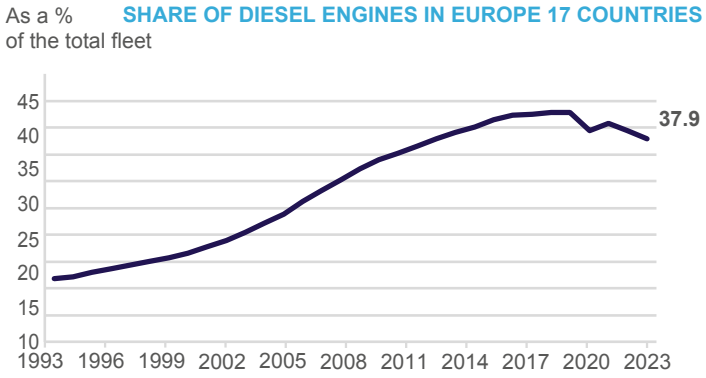
IN EUROPE 17 COUNTRIES: EU-15, SWITZERLAND AND NORWAY



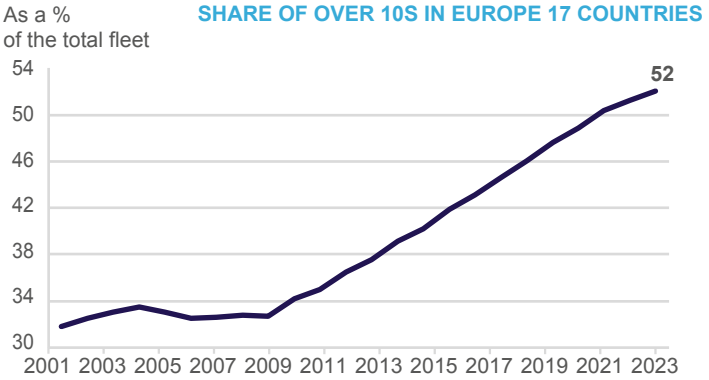
IN THE 10 NEW ENTRY COUNTRIES AND TURKEY



SHARE OF DIESEL ENGINES IN EUROPE 17 COUNTRIES



SHARE OF OVER 10S IN EUROPE 17 COUNTRIES



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

In Western Europe, as of 31 December 2023, the passenger car fleet stood at 246 million units. High ownership rates and the economic crisis have slowed the growth of the fleet, which had been increasing at an average rate of 1.9% per year between 1992 and 2009. From 2009 onwards, the growth rate slowed to an average of 1.1% per year. In the new member states and Turkey, fleet growth slowed from 5.2% per year before 2009 to 3.7% per year thereafter. In 2023, it grew by 3.1%.

After increasing by 2 percentage points per year between 2002 and 2009, the share of diesel engines in the Western European fleet has slowed (+1.2 percentage points per year) and is falling for the third consecutive year to 37.9%. By the end of 2023, diesel engines will remain the dominant powertrain in only five Western European countries, including Spain (54%) and France (51%), despite the decline observed in both countries. In Germany, this share is low (29%), whilst it is closer to the European average (39%) in the United Kingdom (33%) and Italy (41%). In Eastern European countries, the share of diesel is falling for the third consecutive year, indicating a genuine shift towards other engine types, particularly hybrids.

After fluctuating around one-third between 2000 and 2009, the proportion of cars over 10 years old in Western Europe has risen steadily and now stands at 52% as of 31 December 2023, compared with 50.4% two years earlier. This proportion is particularly high in southern European countries, where it stands at almost 60% in Italy, and 63% and 62% in Spain and Portugal respectively. In Eastern European countries, demand for lower-cost vehicles is mainly met by imports of used cars, and the proportion of vehicles over 10 years old is even higher (73% on average). It reaches as high as 81% in Romania but has been revised downwards in Poland (74%) following the correction made to the vehicle fleet.

NEW LIGHT COMMERCIAL VEHICLES IN EUROPE

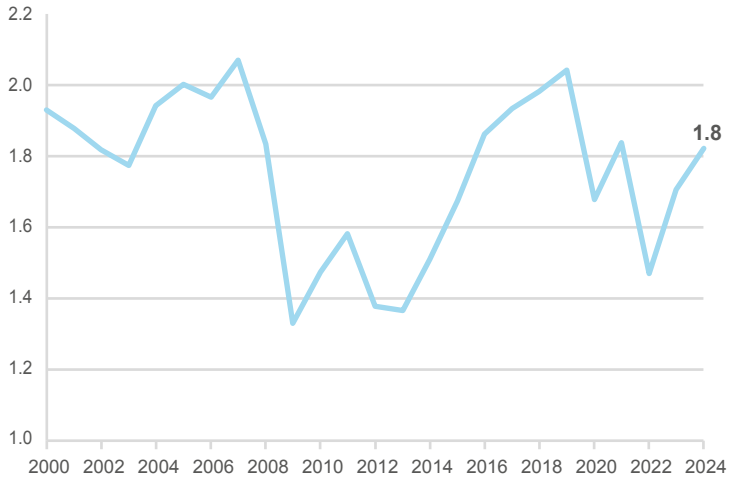
48% **Share of Stellantis and the Renault Group in light commercial vehicle sales in Western Europe in 2024**

In 2024, the Western European light commercial vehicle market grew by 7% to reach 1.8 million units. The two consecutive years of growth have failed to offset the 2022 decline (-20%) linked to the difficult economic climate (inflation, war in Ukraine) and persistent supply issues. The market returned to its 2021 level but remains 11% below 2019 levels. Market growth in 2024, however, varies considerably from country to country. Among the five major markets, the dynamism of Germany and Spain (+8.4% and +13.7%) contrasts with the sluggishness of France (+1.1%) and Italy (+0.9%). The United Kingdom, meanwhile, is recording growth of 2.7%. Compared to 2019, only Italy has returned to its pre-crisis volumes, exceeding them by 6% in 2024.

Growth in the European market between 2014 and 2019 had enabled 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 account for up to 49% of the total commercial vehicle market in 2021. After a decline in 2022 and 2023, their market share rebounded in 2024 and stands at 47.9%. After France, with a market share of 69%, it is in Spain and Italy that the two entities record the highest market shares (55% and 50% of the total respectively in 2024).

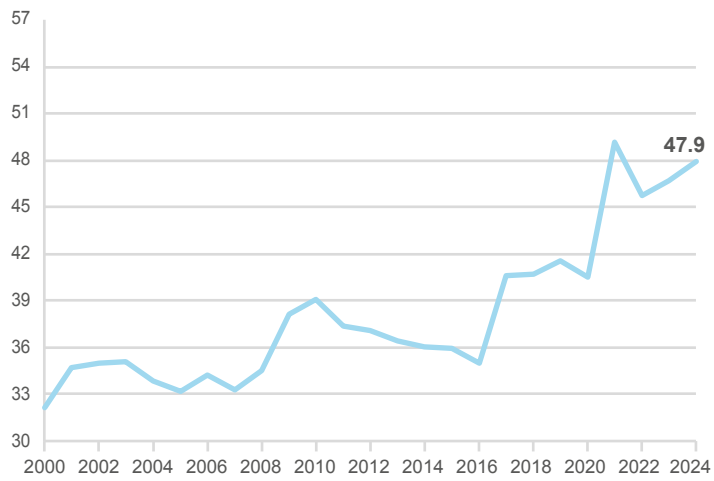
REGISTRATIONS OF LIGHT COMMERCIAL VEHICLES IN EUROPE (18 COUNTRIES)

In millions of units



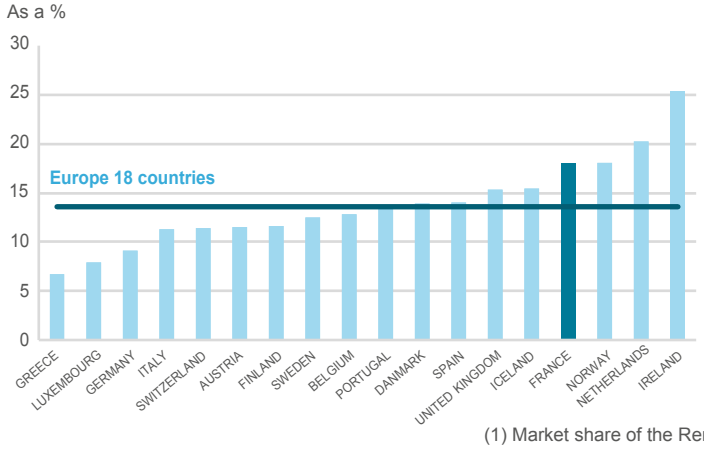
MARKET SHARE OF THE RENAULT GROUP AND STELLANTIS (1)

As a % of the total market



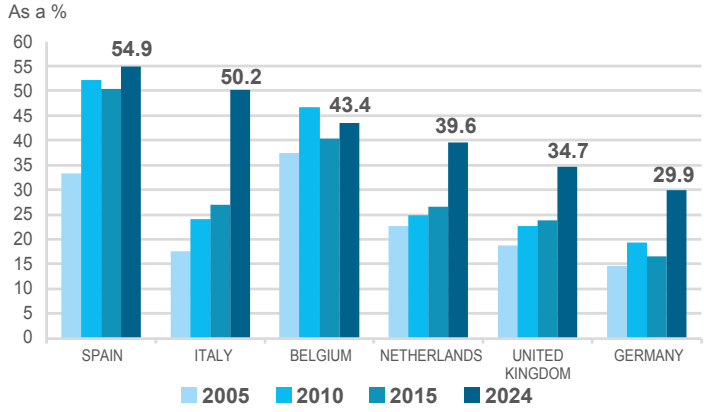
SHARE OF LIGHT COMMERCIAL VEHICLES IN LIGHT VEHICLE REGISTRATIONS (PASSENGER CARS AND LIGHT COMMERCIAL VEHICLES) IN 2024

As a %



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

As a %



(1) Market share of the Renault and PSA groups up to 2020.
Source: CCFA

Tax treatments are not identical across all European countries, so the share of light commercial vehicles in the total light vehicle market varies from country to country. On average, it stood at 13.6% in Western Europe in 2024, but represents only 9.1% in Germany, compared with 18.1% in France. In the Dutch market, the share of light commercial vehicles rose sharply in 2024 (25% of the total). This increase is due to advance purchases ahead of the introduction of new tax measures scheduled for 2025. Market volume, which doubled in 2024, is expected to return to previous levels. In terms of volume, France remains the leading European market, with 381,854 units, ahead of the United Kingdom (361,757 units), Germany (284,931 units), Italy (198,331 units) and Spain (166,637 units), which remains in fifth place.

Since 2014, this market has been growing steadily, and French manufacturers have gained market share compared to 2007. In 2024, Stellantis accounts for 29.6% of the market, but also produces light commercial vehicles for Toyota. The Renault Group, for its part, holds 15.2% of the market and has also produced vehicles for other partner brands (Nissan, Mercedes-Benz, Mitsubishi).

The van segment (Trafic, Master, Expert, Boxer, etc.) accounts for nearly half of sales, and the small van and combi segment (Kangoo, Berlingo, etc.) for around 21%. The other segments are mainly occupied by pick-ups and derivatives of passenger cars.

Despite the expansion of the range of alternative-fuel vehicles, the market share of electric or plug-in hybrid vehicles in Western Europe remains very low and even declined in 2024 (6.9% compared with 8% in 2023). As with passenger cars, it is higher in Norway (29%) and Sweden (23%) and lower in southern European countries (7% in Portugal, 2% in Italy and 4% in Spain), including in France, where the penetration rate is only 7%. In Germany, the market share of electrified vehicles fell to 5% in 2024. Diesel engines remain overwhelmingly dominant in this market, accounting for 84.5% of light commercial vehicle sales in Western Europe and over 90% of the fleet, making it more difficult to meet European CO_2 emission reduction targets.

THE HEAVY TRUCK MARKET IN EUROPE

The Western European market for commercial vehicles of 5.1 tonnes and over declined by 2.7% in 2024, to around 308,000 units. The segment for vehicles of 16 tonnes and over, which accounts for over 80% of volumes, saw a sharper drop of 4.7% compared with 2023.

The broader market for vehicles over 3.5 tonnes reached 325,170 units in Western Europe, down 2.2% year-on-year. Germany, Europe's largest market, with 88,240 vehicles registered in 2024, recorded a 7% decline, following the sharp rise in 2023 (+24%). The United Kingdom, the second-largest market ahead of France (except in the 16-tonne and over segment), recorded a 2% decline to 52,900 units, whilst the French market fell by 3% to 50,600 units. The Spanish market, which ranks fourth, is one of the few to see an increase in volumes in 2024 (+12% in 2024, following +22% in 2023). This growth marks the fifth consecutive year of expansion and enables the market to exceed its 2019 volumes by 30%. Conversely, the German and French markets have not returned to their 2019 levels and are 10% below them in 2024.

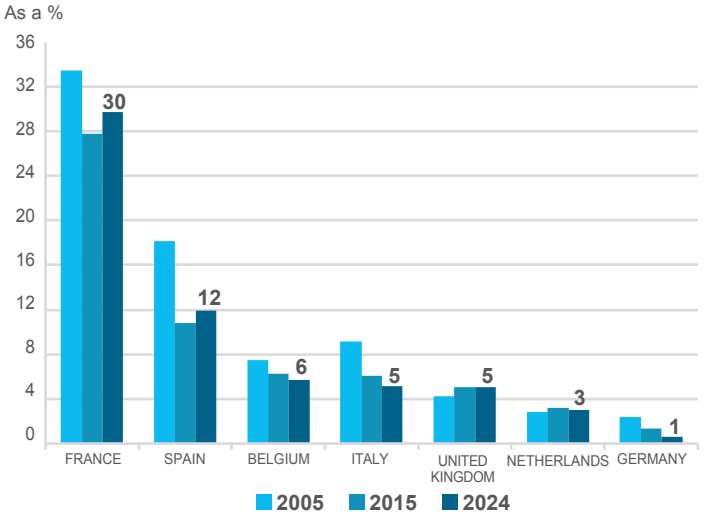
25,049 New Renault Trucks heavy trucks over 5 tonnes sold in Western Europe in 2024

► THE HEAVY TRUCK MARKET IN WESTERN EUROPE
(IN THOUSANDS OF UNITS)

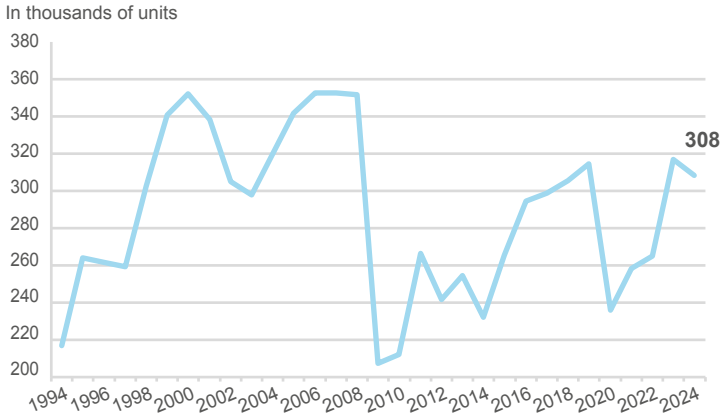
	2010	2015	2019	2023	2024	Variation 2024/2023
REGISTRATIONS OF NEW HEAVY TRUCKS						
from 5.1 t to 15.9 t	54	48	57	49	53	+8.2%
16 t and more	159	217	257	267	255	-4.7%
TOTAL	**212**	**265**	**314**	**317**	**308**	**-2.7%**

Source: ACEA, CCFA estimate

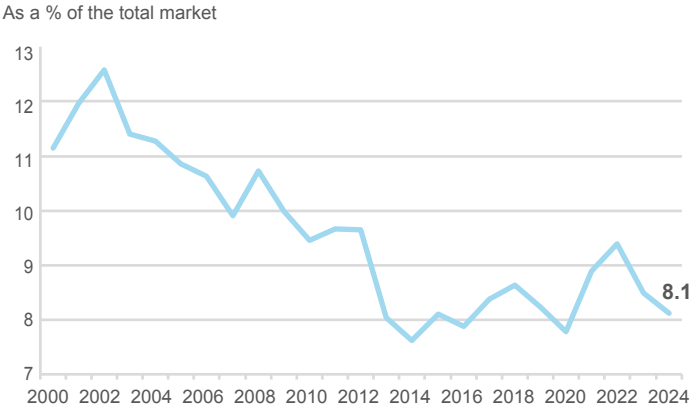
RENAULT TRUCKS MARKET SHARE IN MAJOR EUROPEAN COUNTRIES



REGISTRATIONS OF NEW HEAVY TRUCKS IN WESTERN EUROPE



RENAULT TRUCKS' MARKET SHARE IN WESTERN EUROPE



Source: CCFA

The European market for commercial vehicles over 5 tonnes has undergone significant changes over the past few decades, closely linked to the macroeconomic context. The year 2000 marked an initial peak following the 1993 crisis, after which the market experienced a slump, before setting new volume records in 2006–2008. With the financial and economic crisis of 2009, it then collapsed, losing 150,000 units in a single year. It subsequently fluctuated around 250,000 units, before experiencing a further upturn between 2015 and 2019. With the health crisis of 2020, the market fell back to 240,000 units and rebounded slightly in 2021 and 2022. In 2023, it finally returned to its pre-crisis level but fell again in 2024 to 308,000 units.

Vehicles weighing 16 tonnes or more (rigid lorries or tractor units) dominate the European commercial vehicle market by a wide margin. On average, they account for 8 out of every 10 vehicles. This proportion is slightly lower in Germany and the United Kingdom (around 70 per cent), whilst it exceeds 90 per cent in Sweden, Denmark and the Netherlands.

In Western Europe, the development of alternative energies continues to progress, but at a slower pace than in 2023, due to a sluggish market and the withdrawal of certain purchase or usage subsidies. In the 16-tonne and above segment, electrified vehicles grew by 33% in 2024, compared with +180% in 2023. Their share stands at 1.6% of registrations in 2024. The share of alternative energy sources (gas, hybrids, electric) accounts for 5% of registrations in 2024. Some countries stand out for a higher penetration rate of electric vehicles in their markets (Sweden, Norway, Switzerland, Denmark), whilst others have greater penetration of other alternative energy sources such as gas. This is particularly the case in France, Sweden and Norway, where the share of alternative energy sources other than electricity (mainly gas) will reach 9%, 11.2% and 11.4% respectively in 2024.

The energy transition remains a major concern for manufacturers, as well as for road haulage companies, which must anticipate legislative and regulatory changes (CO_2 emission reduction targets, urban traffic restrictions, sustainable urban logistics). The decarbonisation of the sector must accelerate to address the climate emergency. The range of electric vehicles is expanding and now covers all short-distance applications (urban delivery, regional transport, construction), but it is also essential to stimulate demand by creating conditions conducive to the adoption of electric vehicles. We must accelerate the roll-out of public and private charging infrastructure for heavy-duty vehicles in Europe and introduce purchase or usage incentives (tolls, traffic charges) to reduce the cost gap between combustion-engine lorries and their electric equivalents.

In this context, Renault Trucks is establishing itself as one of the leaders in carbon-free mobility, with a 24.2% market share of electric vehicles of 16 tonnes and above in Europe. Across all energy sources, Renault Trucks' market share in 2024 stands at 9.1% of the entire European market for commercial vehicles of 16 tonnes and over.

REGISTRATIONS AND PRODUCTION IN THE NEW EU MEMBER STATES

Vehicle production in the new EU countries stood at 4.1 million units in 2024, down 2.7% following a sharp rise in 2023. This production level remains 7.2% below its 2019 level. Registrations, meanwhile, increased in 2024 to 1.6 million units, an 8.6% rise compared with 2023. Registered volumes remain 5.6% below their 2019 level. Overall, this region remains strongly export oriented.

The Renault and Stellantis groups have had a commercial presence in this region for many years and have manufacturing facilities there: Stellantis (excluding FCA) in Slovakia and Poland; Renault in Slovenia, and notably in Romania with Dacia. All these sites accounted for a production of 635,000 units in 2024. New light vehicle registrations for Stellantis and the Renault Group in these countries totalled 328,000 units in 2024, representing a market share of 21%, stable compared with 2023.

21% **Market share of the Renault Group and Stellantis for new light vehicles sold in the new EU Member States in 2024**

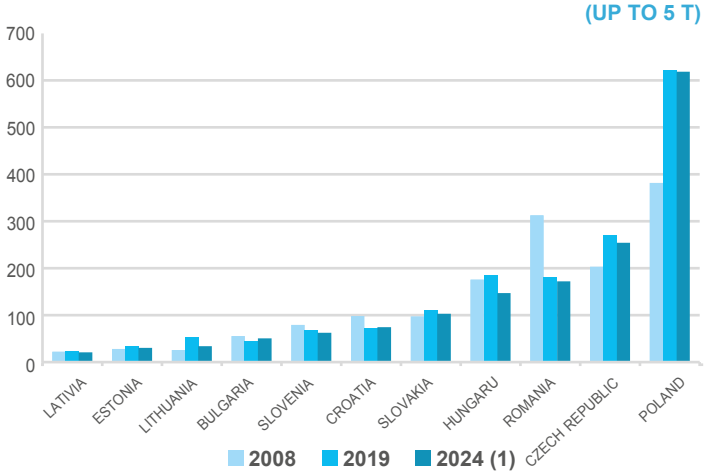
►THE MARKET AND PRODUCTION IN THE NEW EU MEMBER STATES (IN THOUSANDS OF UNITS)

	2023	2024	Variation 2024/2023
VEHICLE PRODUCTION (1)			
Passenger cars	3,858	3,720	-3.6%
Light commercial vehicles	320	345	+7.7%
Heavy vehicles			
TOTAL VEHICLES	4,179	4,065	-2.7%
NEW VEHICLE REGISTRATIONS (2)			
Passenger cars	1,250	1,383	+10.6%
Light commercial vehicles (<=3,5t)	164	176	+7.2%
heavy vehicles (>3,5t)	89	73	-17.7%
TOTAL VEHICLES	1,503	1,632	+8.6%

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

In thousands of units

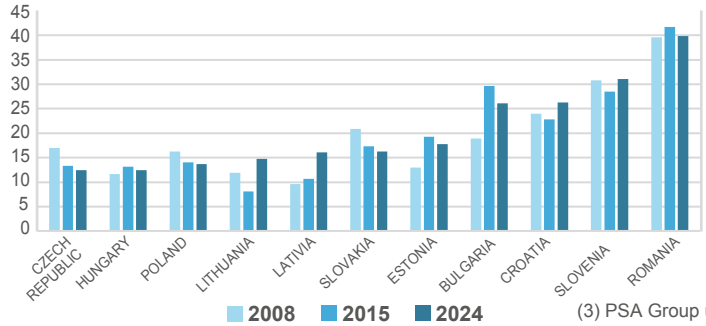
REGISTRATIONS OF NEW LIGHT VEHICLES (UP TO 5 T)



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

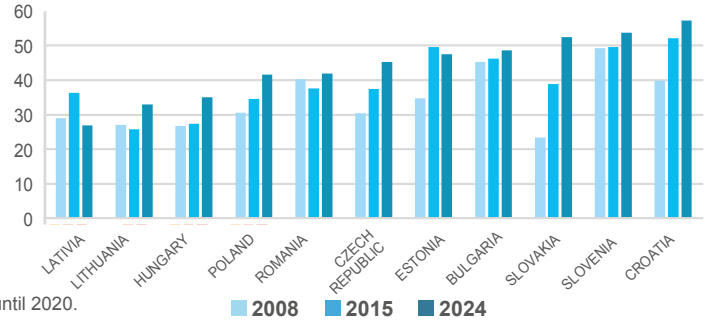
MARKET SHARE OF THE RENAULT GROUP AND STELLANTIS (3): NEW PASSENGER CARS

As a % of the total market



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

As a % of the total market



(3) PSA Group until 2020.
Source: CCFA

Whilst the 15-country European Union is now seen as an automotive market where demand is primarily driven by vehicle replacement, this is not yet the case in all the new EU member states. The average car ownership rate, which stood at 563 passenger cars per 1,000 inhabitants in the European Union in 2023, still masks significant disparities between countries. It is below 500 in the Baltic states, Hungary and Romania, whilst Poland, the Czech Republic and Slovenia have rates close to the European average. In terms of light vehicle registrations, Poland is the largest market with 618,000 units sold in 2024, followed far behind by the Czech Republic (253,000 units), Romania (171,000 units) and Hungary (146,000 units). Poland thus accounts for 40% of the region's passenger car market and 38% of light commercial vehicles. The Czech Republic, in second place, accounts for 17% and 12% of registrations in the region respectively. Romania, the region's third-largest market with 11% of passenger cars, ranks fourth, however, in the light commercial vehicle market alone (11.5%). Indeed, it is overtaken in this segment by Hungary, which accounts for 14.5% of registrations in the region.

In 2024, the automotive markets in the new Member States of the European Union experienced strong growth for the second consecutive year, thanks in particular to the dynamism of the passenger car market (+10.6%). In this segment, Poland saw a 16% rise in registrations and the Czech Republic a 4.6% rise. The Romanian market, in third place, grew by 5.6%. The light commercial vehicle market, meanwhile, saw an increase of 7.2%, driven by double-digit growth in the Romanian and Hungarian markets (+17.3% and +19.4%). The Polish market, for its part, grew by 3.6%. Finally, following a record year in 2023 for heavy vehicle registrations (88,600 units, including 37,300 in Poland), the market fell sharply in 2024 to 72,900 units (-17.7%), a level below that of 2019 (73,300). The decline was observed across the board, except for Croatia, and most of the recorded falls were in double figures, as in Poland (-18.7%) and Hungary (-22%).

The technical specifications (engine capacity, power, body type) of passenger cars registered in this region have become more similar to those in Western Europe, with the exception of those relating to engine type. The share of cars fitted with petrol engines fell to 41% in 2024, a decline of 4 percentage points in one year, but it remains nearly 10 percentage points higher than in Western European countries (32% in 2024). In 2024, petrol remains the dominant engine type in five out of eleven countries (Bulgaria, Croatia, the Czech Republic, Slovakia, Slovenia). As in the rest of the European Union, the share of hybrid and plug- s is growing and stands at 39%, an increase of 5 percentage points compared to 2023. This market share is now identical to that seen in Western Europe, although the market share for plug-in hybrids is lower (2.5%, compared with 8% of sales in Western Europe). Finally, the market share of electric cars remains very low and significantly lower than in Western Europe. Declining in 2024, as in most European Union countries, it stands at just 4% (-0.5 percentage points), compared with 17% in Western Europe. Low purchasing power and delays in the development of charging infrastructure are weighing heavily on the electric vehicle market, as several ACEA studies have shown. In its latest review of charging infrastructure in Europe, ACEA highlights that Poland and Romania are the countries with the lowest number of charging points per 1,000 inhabitants (0.1 and 0.2 per 1,000 respectively, compared with 2.6 in France and over 3 per 1,000 in Northern Europe).

THE AUTOMOTIVE INDUSTRY IN THE EUROPEAN UNION

In 2022, the European automotive industry remained affected by the Covid crisis and its impact on supply chains, notably leading to a shortage of semiconductors, which hampered the resumption of production. In value terms, however, production rose by 15.1% in 2022 and value added increased by 9.6%. Job losses continued. The number of people employed in the automotive industry fell by 1.1%, following a 1.4% decline in 2021. In 2022, the automotive industry employed 2.4 million people, accounting for 8.1% of industrial jobs in Europe. These jobs are divided between vehicle construction (45% of jobs), the manufacture of automotive equipment (49%) and the manufacture of bodywork and trailers (7%).

In the seven Western European countries, where the automotive industry has a long-standing presence, the sector's workforce fell sharply between 2005 and 2010, whilst it grew in the seven new EU member states. Subsequently, thanks to market growth and the increased value of products manufactured in this region, employment rose again between 2010 and 2019, particularly in Germany, though it did not return to its initial level. As for France, it benefited little from this trend due to its reduced competitiveness. Since 2019, the workforce across the European Union has fallen by more than 5%, representing a loss of 132,000 jobs. In Eastern Europe, the workforce had grown by 460,000 people between 2005 and 2019 but has since lost 53,000 jobs since 2019.

In 2022, value added per person in employment in Europe rose by more than 10% to €92,000. In France, it stood at €86,000, below the European average and at a lower level than in Italy, unlike before the crisis. The gap between France and Germany is widening in Germany's favour, rising from €31,000 in 2019 to €47,000 in 2021 and €54,000 in 2022. Labour costs per employee will average €61,000 in 2022, but with significant disparities across Europe. They amount to €67,000 in France, €94,000 in Germany, but only €24,000 on average across the seven Central and Eastern European countries. Social security contributions account for 28% of these costs in France, compared with 24% in Germany and 25% on average across Europe.

In France, the EBITDA/VA ratio is structurally lower than the European average, highlighting the reduced competitiveness of the French market.

The automotive industry, one of the key sectors of the European economy, encompasses the manufacture of motor vehicles, the production of bodywork and trailers, and the manufacture of automotive equipment.

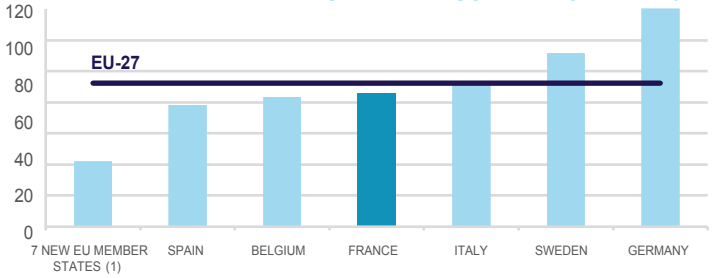
2.4 MILLION People employed in the automotive industry in Europe

► THE AUTOMOTIVE INDUSTRY IN THE EUROPEAN UNION 27 COUNTRIES AND THE UNITED KINGDOM IN 2022 (1)

	Units	European Union (27 countries)	Germany	France	Spain	Italy	Sweden	Belgium	7 new countries (1)	United Kingdom (2018)	Western Europe (7 countries)
Employed personnel	**thousands**	**2,427**	**879**	**217**	**153**	**168**	**85**	**31**	**759**	**166**	**1,699**
including motor vehicle construction	thousands	1,100	558	114	68	65	70	17	156	85	977
including body and trailer manufacturing	thousands	162	53	23	12	13	5	5	30	21	131
including automotive equipment manufacturing	thousands	1,193	261	90	77	91	18	7	573	60	604
Turnover	**millions of euros**	**1,225,908**	**594,710**	**145,702**	**77,674**	**77,221**	**52,168**	**18,868**	**208,200**	**88,239**	**1,054,583**
Production	**millions of euros**	**1,005,702**	**476,442**	**91,556**	**70,618**	**72,173**	**35,598**	**18,118**	**193,442**	**76,217**	**840,722**
Production/Turnover	%	82%	80%	63%	91%	93%	68%	96%	93%	86.4	79.7
Value added (at factor cost)	**millions of euros**	**223,636**	**123,402**	**18,589**	**11,946**	**15,732**	**9,481**	**2,569**	**31,722**	**18,965**	**200,685**
Value added/Production	%	22%	26%	20%	17%	22%	27%	14%	16%	24.9	23.9
Value added per person employed	thousands of euros	92	140	86	78	93	112	83	42	114	118.1
	base 100: 7 new EU member states	220	336	205	187	224	267	200	100	273	283
Purchases of goods and services	**millions of euros**	**1,027,147**	**480,751**	**128,774**	**68,554**	**65,814**	**43,915**	**16,614**	**180,333**	**71,060**	**875,482**
Share of purchases in production	%	102.1	100.9	140.7	97.1	91.2	123.4	91.7	93.2	93.2	104.1
Personnel expenditure	**millions of euros**	**147,698**	**83,021**	**14,569**	**7,352**	**9,083**	**7,088**	**1,990**	**18,111**	**8,879**	**131,983**
Expenditure per person employed	thousands of euros	61	94	67	48	54	83	65	24	53.4	77.7
	base 100: 7 new EU member states	255	396	282	201	226	350	271	100	224	326
Gross operating surplus (GOS)	**millions of euros**	**75,938**	**40,381**	**4,020**	**4,595**	**6,649**	**2,393**	**579**	**13,612**	**10,086**	**68,702**
GOS/Value added	%	34.0	32.7	21.6	38.5	42.3	25.2	22.5	42.9	53.2	34.2

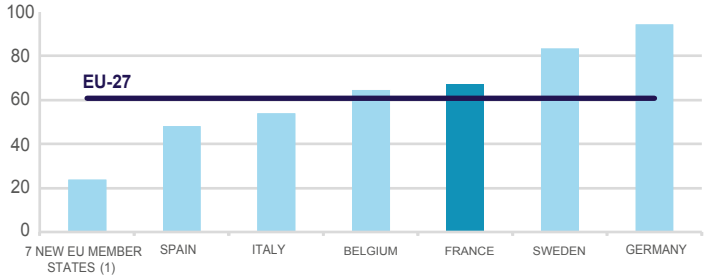
In thousands of €

ADDED VALUE PER PERSON EMPLOYED IN 2022



In thousands of €

STAFF COSTS PER EMPLOYEE IN 2022



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

In 2022, France's share of total employment in the automotive industry across the 27-member European Union fell by 0.2 percentage points to 8.9%. Germany accounts for 36.2% of the workforce (+0.7 percentage points), Italy 6.4% and Spain 6.8%. In 2005, these figures stood at 12% for France and 39% for Germany. Western Europe's share of the workforce has fallen (69.8% in 2022, compared with 84% in 2005) in favour of new, lower-cost countries such as the new entrants to the European Union, represented here by seven countries (Hungary, Poland, the Czech Republic, Romania, Slovakia, Slovenia and Bulgaria). They now account for 31.5% of the total workforce, compared with 16% in 2005.

Automotive industries vary greatly from country to country in terms of structure and labour costs. In Germany and Sweden, over 60% of the automotive industry workforce is employed in vehicle manufacturing, compared with 52% in France, 45% in Spain, 39% in Italy and 21% in the seven new member states. In 2022, the wage cost gap between Germany or France and the new member states remains significant. The index of expenditure per person employed, expressed on a base of 100 for the average of the seven new member states, stands at 282 in France, 350 in Sweden and 396 in Germany. After widening due to the social support policies implemented by governments in 2020, it narrowed in 2021 and 2022.

On average across the European Union, the automotive industry accounts for 8.1% of direct industrial jobs, but this figure rises to 11% in Germany, 13.4% in the Czech Republic, 14.1% in Sweden, and between 14% and 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 employs, directly and indirectly, 3.1 million people in Europe excluding the UK, representing 10.3% of industrial jobs. When all automotive-related jobs in services (retail, repairs, hire, insurance), transport (passenger and freight) and construction (road maintenance) are included, the sector employs, directly or indirectly, 13.2 million people, representing 6.5% of all jobs in Europe.

THE SITUATION OF MANUFACTURERS IN 2024

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

In 2024, the Stellantis Group, formed from the merger of the PSA and FCA groups, sold 5.5 million vehicles, compared with 6.4 million in 2023. It comprises 14 car brands and 2 mobility brands, and in 2024 employs 249,000 people worldwide, including 40,000 in France, spread across some twenty sites: assembly plants, plants producing internal combustion engines and now electric motors (Trémery) and mechanical components; R&D centres (Vélizy and later Poissy), and spare parts warehouses (Vesoul).

In France, downstream expansion is taking place in the field of parts distribution through Distrigo, Mister-Auto and B-parts, and in maintenance and repair via the Eurorepar Car Service network. For distribution, the group relies on "Stellantis & You, Sales and Services", formed from the merger of PSA Retail and Motor Village (the distribution division of the former FCA Group). In 2024, a joint venture led by Stellantis, Leapmotor International, launched its distribution operations for vehicles from Leapmotor, a Chinese manufacturer of new energy vehicles, outside China. Stellantis supports its vehicle shipments through the sale of spare parts and related accessories, as well as service contracts, worldwide. Stellantis is also active in the used car market with AramisAuto and Spoticar, multi-brand used car labels. Through the Free2Move and Leasys brands, it is expanding into mobility services, including internationally, and strengthened its position in 2022 with the acquisition of Share Now.

In 2022, the group unveiled its 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, significant investments are being made to transform engine plants, develop electric mobility and strengthen the circular economy. Following the inauguration of the ACC battery plant in Douvrin (May 2023) and the joint venture agreement with CATL, which involves an investment of €4.1 billion for production to start in late 2026, in 2024, Stellantis initiated a collaboration with the CEA on next-generation batteries and partnered with Zeta Energy to develop lithium-sulphur batteries for electric vehicles. In 2023, Stellantis signed several cooperation agreements or equity investments to secure its supply of raw materials (Vulcan Energy, Alliance Nickel, Kuniko, CTR). In 2024, it is also continuing to develop its recycling and circular economy activities (launch of a Reuse range in the United States via the B-Parts platform, opening of VALORAUTO services to private individuals, new SUSTAINera RECYCLE product range).

Internationally, the Stellantis Group has a strong presence in Europe, North America and Latin America. It plans to continue expanding its operations worldwide (India, Africa, the 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 2024, the Renault Group sold 2.4 million vehicles worldwide, the same as in 2023. It employs 100,000 people, 41,600 of whom are based in France. It has around fifteen sites: assembly plants (Batilly, Sandouville), engine and mechanical production facilities (Cléon, Le Mans), a site dedicated to the circular economy (Flins) or to electric vehicles (Electricity division), and R&D centres (Guyancourt).

In France, its downstream presence is supported by Renault Retail Group, which distributes new and used vehicles, as well as spare parts under various brands, but whose activities also cover maintenance, mechanics, bodywork, quick services (Renault Minute Services), short-term hire and mobility services (Mobilize) and financing (Mobilize Financial Services).

The group launched the "Renaulution" strategic plan in 2021 with the aim of achieving net-zero CO_2 emissions by 2040 in Europe and by 2050 globally. This three-phase plan is designed to restore competitiveness. The Resurrection phase was completed in 2022 with the achievement of its profitability target. The Renovation phase, linked to the introduction of a new product range, has been underway since 2022 (15 new vehicles) and will continue in 2025 with 7 new vehicles. The Revolution phase began in 2022 with the creation of five business units. Activities relating to internal combustion and hybrid powertrains are grouped within the Power entity (official creation of Horse with Geely in May 2024 and acquisition of a 10% stake by Aramco in December 2024). The Ampere entity is dedicated to electric vehicles and software; from 2024, it will be supported by a China-based entity designed to accelerate vehicle development and manufacturing times. The future is NEUTRAL is the entity bringing together circular economy activities, including the 'remanufacturing' operations at the Refactory in Flins (Suez acquired a 20% stake in October 2024). The Mobilize entity, dedicated to financial, mobility, energy and data services, and the Alpine entity, dedicated to the premium segment, complete this organisation.

The partnership with Nissan, which began in 1999 within the Alliance, has been refined and expanded over time, with the addition of Mitsubishi in 2016. The year 2024 was devoted to implementing the New Alliance Agreement, concluded by the Renault and Nissan group, which came into force on 8 November. This new agreement aims to continue collaboration on high-value-added operational projects (projects in Latin America, India and Europe).

For the production of batteries for its electric vehicles, the manufacturer has chosen two strategic partners: Envision AESC and Verkor. It has also announced the creation of a joint venture with Minth Group to produce battery packs for electric vehicles. Partnerships have also been signed with the French start-up Whylot (development of an electric motor), Airbus (next-generation batteries) and the CEA (bidirectional charger). Finally, a contract to supply green electricity in France has been signed with Voltalia. To secure its supply of raw materials, the Group has signed strategic partnerships with Vulcan Energy, Arverne Group (lithium), Terrafame (nickel) and Managem Group (cobalt).

In the commercial vehicle sector, in addition to production agreements with Mercedes-Benz and Nissan, the Renault Group has officially launched the joint venture Flexis SAS with the Volvo Group and CMA-CGM, aimed at producing a new generation of 100% electric vans and associated services based on a "software-defined vehicle" architecture.

Renault Trucks: www.renault-trucks.com

Renault Trucks, with 57,000 vehicles sold in 2024, is one of the world's leading truck manufacturers. Its truck models are assembled in France at its plants in Bourg-en-Bresse (high-end range) and Blainville-sur-Orne (cabins and mid-range), whilst overseas it relies on partners for local assembly.

Part of the Volvo Group, which employs over 100,000 people worldwide, Renault Trucks has 9,400 employees, four-fifths of whom are based in France, as well as a global network of distributors and importers with 1,500 sales and service outlets. In addition to complete vehicle assembly, Renault Trucks operates engine assembly and stamping facilities in Vénissieux, research and development centres in Saint-Priest, and a parts reconditioning facility in Limoges. Furthermore, as part of the circular economy, Renault Trucks has set up workshops specialising in the conversion of used trucks (Used Trucks Factory in Bourg-en-Bresse) and in the recovery of parts (Used Parts Factory in Vénissieux).

The year 2024 was marked by an acceleration towards electromobility with the series production of 44-tonne electric trucks (E-Tech T and C), launched in November 2023 at the Bourg-en-Bresse plant. The manufacturer now offers the most comprehensive range of 100% electric vehicles in Europe, ranging from cargo bikes to 50-tonne heavy goods vehicles, thanks to partnerships with Renault (E-Tech Master and E-Tech Trafic) and Kleuster (cargo bikes). In the segment for electric vehicles over 16 tonnes, the manufacturer has increased its market share in Europe, reaching 24.2% (and 80% in France) in 2024. The manufacturer is also working on decarbonising its own logistics operations using electric trucks, with the aim of carrying out 100% of inter-plant transport by electric vehicle by 2030. The year 2025 is marked by the expansion of the range, with the launch of an electric tractor unit with a range of up to 600 km and the addition of the future Flexis commercial vehicles to its offering.

	Units	Stellantis	Renault Group	Volvo Group
Turnover	millions of euros	156,878	56,232	48,467
Research and development expenditure	millions of euros	6,222	2,274	2,848
Net income	millions of euros	5,520	891	4,653
Global workforce	number of people	248,883	98,636	101,595
including France	number of people	40,000	41,600	10,000

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

92,000 people Manufacturers' workforce in France

LOCATION OF RENAULT GROUP, STELLANTIS (EXCLUDING FCA) AND RENAULT TRUCKS FACTORIES IN 2024

EUROPE

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

Germany
15 Eisenach (Opel)
16 Rüsselsheim (Opel)

Spain
17 Palencia
18 Saragosse
19 Valladolid
20 Vigo
21 Madrid (Villaverde)

Italy
22 Melfi (Fiat)
23 Val di Sangro (Fiat)

Poland
24 Gliwice (Opel)

Portugal
25 Mangualde

Romania
26 Mioveni (Pitesti)(Dacia)

United Kingdom
27 Ellesmere Port (Opel)
28 Luton (Opel)

Serbia
29 Kragujevac (projet)

Slovakia
30 Trnava

Slovenia
31 Novo Mesto

Turkey
32 Bursa (Oyak)
33 Bursa (Karsan)
34 Bursa (Tofas)

62 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 Betim (Fiat)
38 Curitiba
39 Porto Real

Colombia
40 Envigado (Sofasa)

Uruguay
41 Montevideo (Nordex)

AFRICA

Algeria
42 Meftah (BSF Souarki)
43 Oran (Oued Tlelat)
44 Oran (Tafraoui) (Fiat)

Kenya
45 Thika (CKD by Caetano Kenya/KVM)

Morocco
46 Casablanca
47 Kenitra
48 Tanger

Tunisia
49 Tunis (STAFIM)

ASIA

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

China
51 Chengdu (DPCA)
52 Dingzhou (ChangAn)
53 Shenzhen (SQRI - CAPSA)
54 Shiyan (eGT-NEV)
55 Wuhan (DPCA)

South Korea
56 Busan (Renault Korea Motors)

India
57 Chennai (Renault-Nissan)
58 Thiruvallur (Chennai) (HMFCL - CK Birla)

Indonesia
59 Purwakarta (Indomobil)

Malaysia
60 Gurun (Naza Automotive Manufaturing)

Pakistan
61 Karachi (Lucky Motor Corporation)

Vietnam
62 Chu Lai (Thaco)

GLOBAL PRODUCTION OF AUTOMOTIVE GROUPS

In 2024, global production by the Renault Group and Stellantis (excluding FCA) fell by 4% to 5 million vehicles, returning to its 2022 level. Between 1996 and 2018, it had increased by more than 110%, representing an average annual growth rate of 3%, driven both by the expansion of markets in Europe outside France and, subsequently, those outside Europe. In 2024, it was down 37% on its 2018 level, impacted by the weakness of the French market, but also by production difficulties in China and the withdrawal of operations in Russia.

Passenger car production stood at 4 million units, down 4% compared with 2023 and by more than 40% compared with the 2018 record. Production of light commercial vehicles fell by 4.5% to 1.06 million units, slightly above its 2018 level.

The Renault Group and Stellantis (excluding FCA) operate a wide variety of sites: historic plants (Sochaux, Sandouville), newer plants in emerging markets (Tangier, Kenitra), large-scale plants (Vigo, Pitesti), those producing a single model type (Trnava, Bursa) or a wide variety (Chengdu, Curitiba), those for light commercial vehicles such as vans (Hordain, Batilly) and those for smaller light commercial vehicles (Maubeuge, Vigo). Among these sites, an increasing number are producing electric vehicles. Some are entirely dedicated to this, such as Douai, whilst others are multi-energy (Mulhouse, Poissy...). Furthermore, the Renault and Stellantis groups produce vehicles at sites belonging to partner s where this presents an opportunity (Karsan in Turkey, Oran, Vietnam, ...).

► PRODUCTION OR ASSEMBLY LOCATIONS BY MODEL IN 2024

STELLANTIS (EXCLUDING FCA)

Makes and models	Production or assembly locations in 2024
Peugeot: 208	Kenitra (Morocco), Buenos Aires (Argentina), Zaragoza (Spain)
Citroën: C3, C3 Aircross, C3-IV	Trnava (Slovakia), Zaragoza (Spain), Porto Real (Brazil), Wuhan (China), Tiruvallur (India)
Citroën: Basalt	Porto Real (Brazil), Tiruvallur (India)
DS: DS3 Crossback	Poissy (France)
Citroën: C-Elysée	Vigo (Spain)
Peugeot: 308	Mulhouse (France)
Peugeot: 2008	Vigo (Spain), Gurun (Malaysia) (Naza Automotive Manufacturing), Chulai (Vietnam) (THACO), Pakistan (Lucky Motor Corporation)
Peugeot: 3008	Sochaux (France), Chulai (Vietnam), Gurun (Malaysia), Chengdu (China) (DPCA)
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)
DS: DS4	Russelsheim (Germany)
DS: DS7 Crossback	Mulhouse (France)
DS: DS9, DS9 E	Shenzhen (China), Melfi (Italy)
Peugeot: 408	Mulhouse (France), Wuhan-Chengdu (China), Chulai (Vietnam), Gurun (Malaysia)
Peugeot: 508	Mulhouse (France), Wuhan (China)
Peugeot: Partner, Rifter / Citroën: Berlingo / Opel: Combo	Vigo (Spain), Mangualde (Portugal), Palomar (Argentina), Ellesmere (United Kingdom), Betim (Brazil)
Peugeot: Landtreck	Gurun (Malaysia), Dingzhou (China), Tafraoui - Stafim (Tunisia)
Peugeot: Expert / Citroën: Jumpy	Hordain (France), Montevideo (Uruguay) (Nordex), Luton (United Kingdom), Bursa (Turkey)
Peugeot: Traveller / Citroën: Spacetourer	Hordain (France)
Peugeot: Boxer / Citroën: Jumper / Opel: Movano	Val di Sangro (Italy), Gliwice (Poland)
Opel: Vivaro, Zafira Life	Hordain (France), Luton (United Kingdom), Bursa (Turkey)
Opel: Corsa, Crossland	Zaragoza (Spain)
Opel: Astra	Rüsselsheim (Germany)
Opel: Frontera	Trnava (Slovakia)
Opel: Grandland	Eisenach (Germany)
Opel: Mokka	Poissy (France)

Source: Stellantis

RENAULT GROUP

Makes and models	Production or assembly locations in 2024
Alpine: A110	Dieppe (France)
Alpine: A290	Douai (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, Symbioz	Valladolid (Spain)
Renault: Logan 2, Logan 3, Sandero 2	Casablanca (Morocco), Córdoba (Argentina), Curitiba (Brazil), Envigado (Colombia), Pitești (Romania)
Renault: Austral, Rafale	Palencia (Spain)
Renault: Koleos, Grand Koleos	Busan (South Korea) (RKM)
Renault: Duster 2, Duster 3	Curitiba (Brazil), Envigado (Colombia), Pitesti (Romania), Bursa (Turkey)
Renault: Triber, Kiger	Chennai (India)
Renault: Dokker, Express Van	Cordoba (Argentina), Tangier (Morocco)
Renault: Arkana/XM3	Busan (South Korea)
Renault: Megane 4, Megane 4 Estate, C-segment saloon	Palencia (Spain), Bursa (Turkey)
Renault: Megane E-Tech	Douai (France)
Renault: Scenic E-Tech	Douai (France)
Renault: Espace 6	Palencia (Spain)
Renault: R5	Douai (France)
Renault: Kangoo, Kangoo ZE	Maubeuge (France)
Renault: Master 3, Master 4, Master ZE	Batilly (France), Curitiba (Brazil)
Renault: Trafic 2, Trafic 3, Trafic ZE	Sandouville (France)
Renault: Alaskan	Córdoba (Argentina)
Renault: Kardian	Curitiba (Brazil)
Dacia: Sandero, Logan	Pitești (Romania), Tangier (Morocco), Casablanca (Morocco)
Dacia: Duster, Jogger	Pitești (Romania), Tangier (Morocco), Bursa (Turkey)
Dacia: Bigster	Pitești (Romania)
Dacia: Spring (K-ZE)	Shiyan (China)
RKM: Koleos, Talisman, Arkana	Busan (South Korea)

Source: Renault Group

NEW VEHICLE OUTLETS FOR AUTOMOTIVE GROUPS

In 2024, sales outside France by the Renault Group, Stellantis (excluding FCA) and Renault Trucks accounted for 73% of their global production, compared with 67% in 2000 and 60% in 1990. Passenger car deliveries fell by 2.2% in 2024, despite a global passenger car market that continued to grow (+3%), albeit at a slower pace. Deliveries of commercial vehicles (light and heavy commercial vehicles), meanwhile, rose by 2.6% in 2024, driven by strong demand for light commercial vehicles.

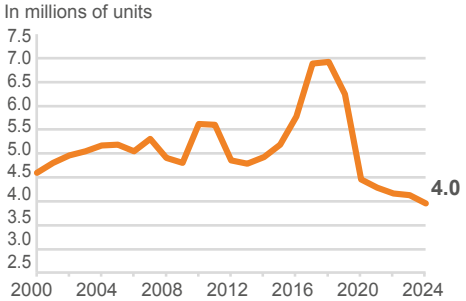
For all vehicles combined, the share of deliveries to the European Union stood at 56% in 2024. For passenger cars, deliveries to the EU accounted for 55% of total deliveries. For commercial vehicles, the EU's share stood at 59% in 2024. When deliveries to the United Kingdom are included, the share going to this region now stands at 65% for passenger cars and 74% for commercial vehicles. Across the whole of the European continent, deliveries in 2024 will account for 77% of the total for passenger cars and 85% for commercial vehicles. This growing share of Europe is largely due to the increase in deliveries to Turkey, which have risen from 7% in 2022 to 10% in 2024 for passenger cars, and from 5% to 9% for commercial vehicles.

Whilst deliveries to other continents rose sharply between 2000 and 2017, they began to slow down before the COVID crisis and have not returned to their previous levels since the crisis. Deliveries of passenger cars to Asia have declined and now account for just 6% of the total in 2024. Deliveries of passenger cars to the Americas, meanwhile, account for 12% of the total in 2024.

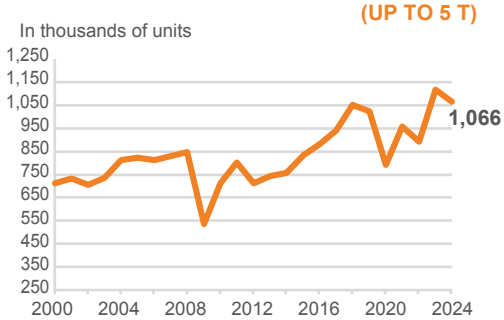
73% **Share of non-French markets in the sales of the Renault Group, Stellantis (excluding FCA) and Renault Trucks**

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

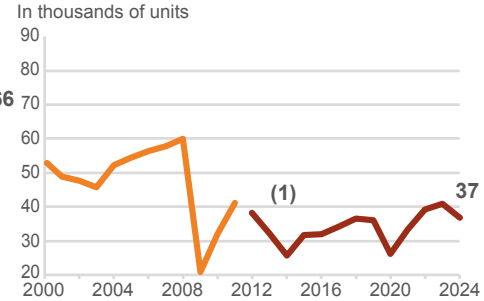
NEW PASSENGER CARS



NEW LIGHT COMMERCIAL VEHICLES (UP TO 5 T)



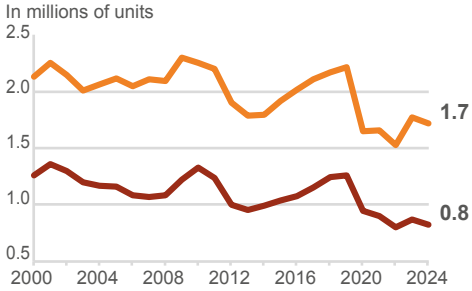
NEW HEAVY TRUCKS (OVER 5 T)



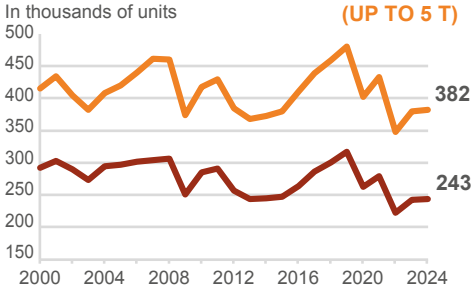
(1) From 2012, the scope of heavy trucks covers invoices of 7 tonnes and more (see note page 81).
Source: CCFA

► VEHICLE REGISTRATIONS IN FRANCE

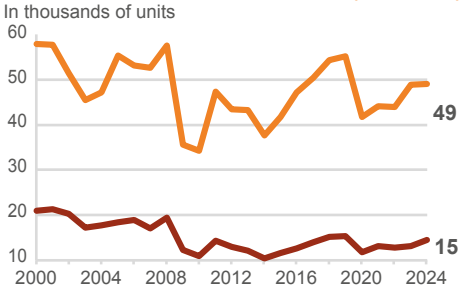
NEW PASSENGER CARS



NEW LIGHT COMMERCIAL VEHICLES (UP TO 5 T)



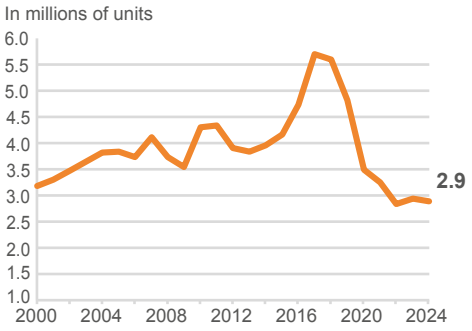
NEW HEAVY TRUCKS (OVER 5 T)



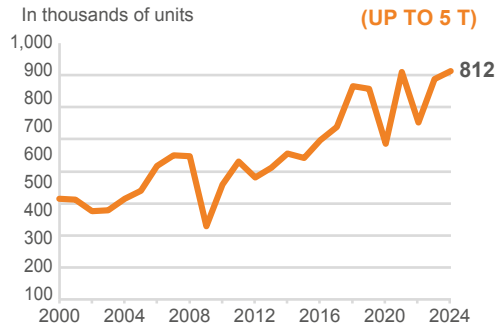
TOTAL — FRENCH GROUPS

► DELIVERIES OUTSIDE FRANCE

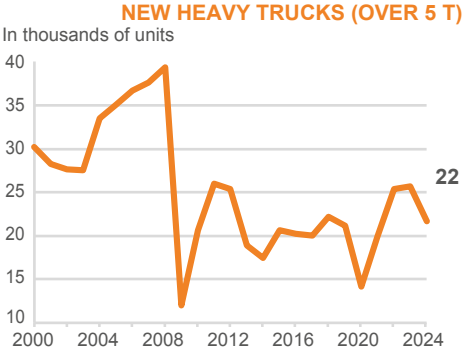
NEW PASSENGER CARS



NEW LIGHT COMMERCIAL VEHICLES (UP TO 5 T)



NEW HEAVY TRUCKS (OVER 5 T)



Source: CCFA

The Renault and Stellantis groups (excluding FCA) have expanded their operations worldwide, following the opening and development of emerging markets. The French market therefore automatically plays a less significant role in their sales than before. In 1990, the French market for new passenger cars stood at 2.3 million units, whilst 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. Since the health crisis, registrations in France have fallen to an average of around 1.7 million passenger cars, and global production of these vehicles by the Renault and Stellantis groups (excluding FCA) is forecast to reach 3.9 million in 2024.

In 2024, deliveries of passenger cars by the Renault Group and Stellantis (excluding FCA) outside France fell to 2.9 million units, down 2.2%. They are now below their 2013 low. Deliveries of light commercial vehicles, however, rose in 2024 (+3.2%) to 812,000 units. Finally, deliveries of heavy goods vehicles fell sharply in 2024 to 21,679 units, a 16% drop compared with the previous year.

ECONOMIC RATIOS OF THE AUTOMOTIVE SECTOR IN FRANCE

Between 2012 and 2017, value added per employee in the automotive manufacturing sector grew significantly, thanks to the improved health of European markets, manufacturers' productivity efforts, and the higher average unit value of vehicles produced (an increase in the share of light commercial vehicles and high-end vehicles in French production). The health crisis brought activity to a sudden halt in 2020, resulting in a fall of nearly 25% in value added at constant prices. By 2022, it had returned to its 2019 level (at constant prices), then exceeded it in 2023 thanks to the re d production and increased turnover. In 2023, value added stood at €135,500 in vehicle manufacturing (€115,000 in 2015 prices). This is higher than in the manufacture of automotive equipment (€107,400) and in the manufacturing industry (€96,100).

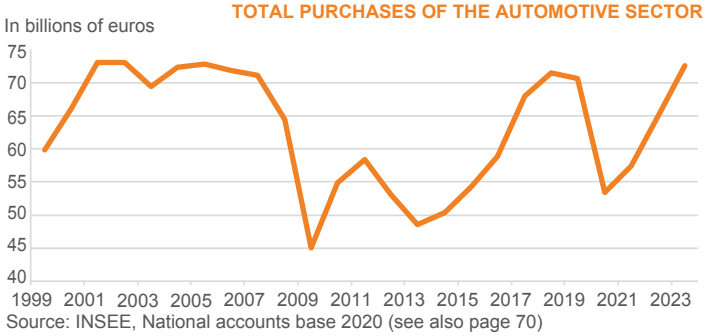
As for the workforce, it continues to decline. In 2020, the support measures and short-time working schemes introduced during the crisis had mitigated the impact of the fall in production.

The share of export turnover stands at 60% in 2024, compared with an average of 40% in the manufacturing industry and 54% in automotive equipment manufacturing.

At the crossroads of many diverse technologies, the automotive sector requires significant investment: since the 2009 crisis, the automotive industry has allocated an average of 2% of its turnover to this each year. This ratio fell in 2021 against a backdrop of uncertainty, the energy transition and optimisation, but it rose to 2.5% in 2023. In 2023, the automotive industry thus accounted for 8.6% of total investment in the manufacturing sector.

Finally, the automotive sector has a significant impact on other sectors, particularly through its purchases. Total purchases by the automotive sector amounted to €72.6 billion in 2023, nearly half of which (45%) were made from other sectors (electrical, electronic and IT equipment; the service sector; etc.).

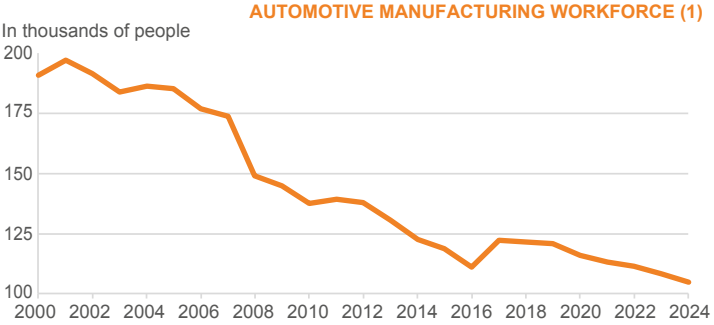
TOTAL PURCHASES OF THE AUTOMOTIVE SECTOR



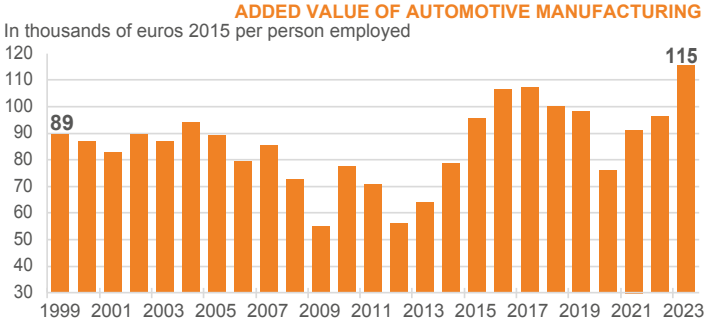
Source: INSEE, National accounts base 2020 (see also page 70)

60% Share of export turnover in the automotive manufacturing sector in 2024

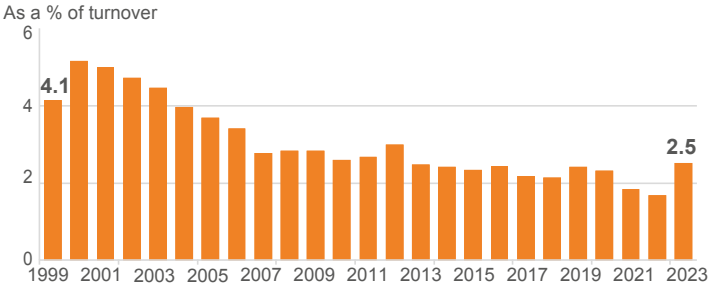
AUTOMOTIVE MANUFACTURING WORKFORCE (1)



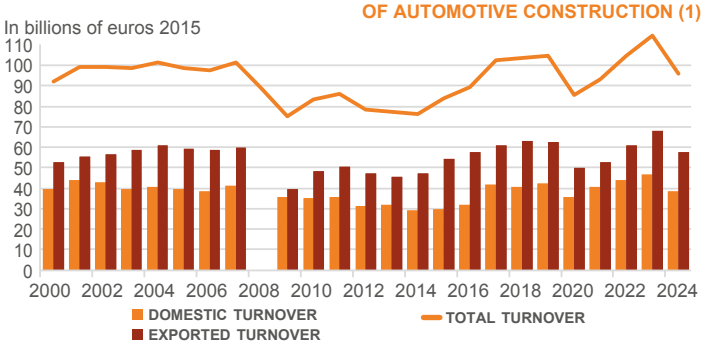
ADDED VALUE OF AUTOMOTIVE MANUFACTURING



INVESTMENTS IN AUTOMOTIVE MANUFACTURING



DOMESTIC TURNOVER AND EXPORT TURNOVER OF AUTOMOTIVE CONSTRUCTION (1)



(1) CCFA estimates for 2023: see also pages 90 and 91.
Source: SESSI, INSEE from 2008

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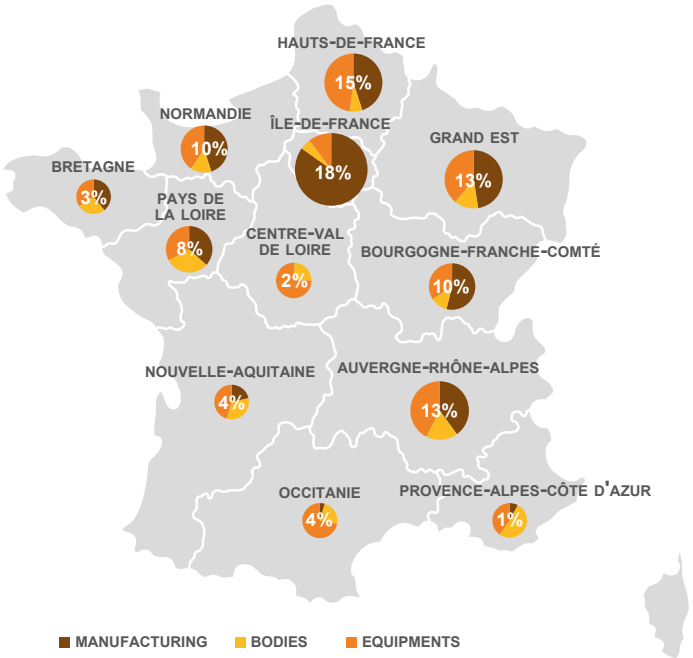
THE AUTOMOTIVE INDUSTRY IN THE REGIONS

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, through its presence, has powerful knock-on effects on the rest of the economy. Although direct employment in the automotive industry has declined over the last twenty years, with a significant economic impact at local level, investment projects linked to the green transition are expected to support employment and the economy in the regions concerned. The Regional Automotive Industry Associations (ARIA), working closely with competitiveness clusters, bring together companies in the sector across the regions and, alongside public authorities and educational and research institutions, initiatives specific to the regional sector (development of innovation and R&D, promotion of the sector and the region, increased competitiveness and performance, and the 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 2024 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, after aerospace, with the highest value-added multiplier. According to INSEE, one unit of value added in the automotive sector generated 4.1 units of value added in the national economy. Other INSEE studies in the regions have demonstrated the impact of the automotive industry on direct jobs (manufacturers' production and research sites), as well as on indirect jobs (staff employed by suppliers, subcontractors and service providers) and induced jobs, which are those required to meet the consumption needs of employees (both 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 employees in the automotive industry has fallen, but it remains an important sector in several regions. According to URSSAF data, which is based on business activity codes, Île-de-France is currently the region with the highest number of salaried jobs (18% of the total in 2024). 87% of the workforce is in construction and 9% in equipment manufacturing, with the remainder in bodywork. A study published by INSEE in 2020[2] indicates that the broader automotive sector, which includes manufacturing, trade and maintenance-repair activities, accounts for up to 110,000 employees in the Seine Valley (departments in western Île-de-France + coastal departments in Normandy or those crossed by the Seine). Research and development activities for the entire automotive industry are mainly located in Île-de-France (Stellantis in Vélizy and on the future research campus in Poissy, Renault in Guyancourt). Furthermore, changes in the sector are also accompanied by a refocusing of service sector activities in the region (Poissy) and the development of new activities (used car reconditioning, retrofitting, battery recycling and management in Flins, and electric motor production in Cléon).

The sector also has a strong presence in the Hauts-de-France region, accounting for 15% of the total workforce in the automotive industry in France, according to URSSAF. In 2018, a study[3] estimated that there were 56,000 direct and indirect jobs in the regional automotive industry, including 15,400 in vehicle manufacturing, 15,000 in the manufacture of automotive equipment and 26,300 in the supply of materials, intermediate products and services. More recently, the region has been chosen to host the four largest battery plant projects in France (ACC in Douvrin, Verkor and ProLogium in Dunkirk, and Envision AESC in Douai), which are expected to make it 'the European battery valley' and offset the decline in workforce numbers linked to the phasing out of internal combustion engines. These new plants are expected to be fully operational by 2030 and are projected to create between 10,000 and 20,000 new direct and indirect jobs.

The Grand Est region ranks as the third-largest automotive region in terms of workforce, accounting for 13% of jobs according to URSSAF. It is also committed to the energy transition, with the creation at the Tremery site of a complete production and assembly line for electric motors, enabling the delivery of 600,000 electric motors per year by 2025 and the preservation of jobs.

In the Bourgogne-Franche-Comté region, the automotive sector employed 42,340 people in 2020[4], including 10,740 in vehicle 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, 1,000 in the manufacture of capital goods and 880 in transport and logistics.

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

[1] Key Facts No. 113, INSEE Franche-Comté, May 2009
[2] Overview of Industry in the Seine Valley, INSEE Normandy, November 2020
[3] Horizon éco No. 290, ARIA Hauts-de-France, October 2019
[4] INSEE Analyses Bourgogne-Franche-Comté, May 2024

FACTORS AFFECTING THE COMPETITIVENESS OF THE FRENCH AUTOMOTIVE INDUSTRY

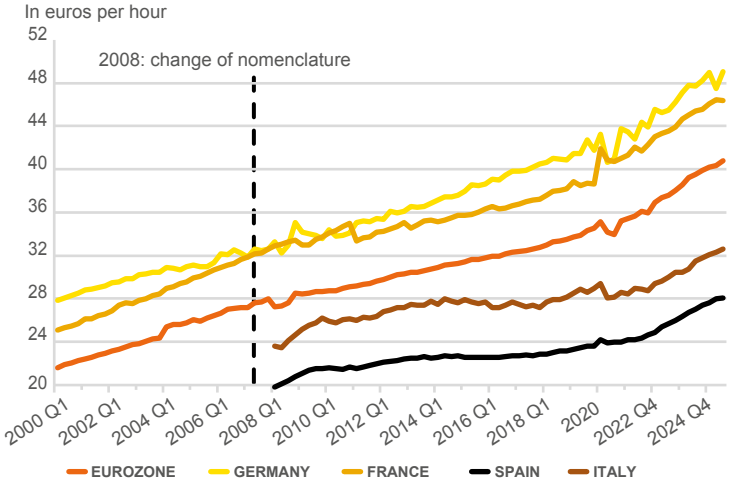
In a highly competitive global market, car manufacturers must be competitive in their home country and face factors common to the entire industry. These include labour costs, the burden of compulsory levies on factors of production, exchange rates and energy prices. Others are specific to the automotive sector, such as the opening of the core market to competition and, in Europe, the burden of regulation. All these factors weigh on profit margins (the ratio of gross operating surplus to gross value added) and affect companies' ability to invest in production, product development, and research and development in the areas of the energy transition, digital technology and new forms of mobility.

In France, since the 2000s, the competitiveness of manufacturers has declined. Following the 2008 crisis, the government attempted to implement policies to boost competitiveness; manufacturers, for their part, also pulled out all the stops internally to develop their business and maintain industrial and research sites in France. All these measures have yielded results, but the French industrial sector continues to suffer from reduced economic competitiveness both within Europe and beyond (in Asia). Production taxes – those linked 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 2024, although down by 0.2 percentage points compared with 2023, they accounted for 2.9% of GDP in France, compared with 1.7% in Italy, 1% in Spain and 0.7% in Germany, according to Eurostat.

In 2022, the conflict in Ukraine triggered 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, engineering). In Europe, governments have mitigated the impact through support measures. However, competitiveness gaps remain within Europe and are even more pronounced compared to countries such as China, where energy prices are lower.

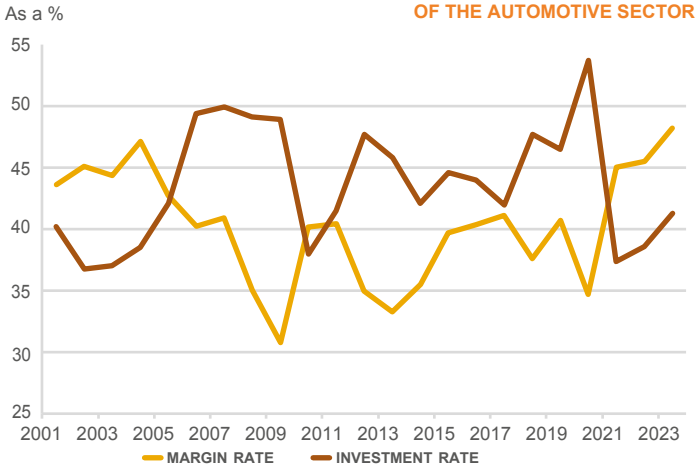
The slump in activity during the health crisis in 2020 caused a fall in companies' profit margins, which dropped to 35% for the automotive sector. This ratio then recovered from 2021 onwards, reaching 48% in 2023. As for the sector's investment rate, it fluctuates mainly in line with changes in value added, falling from over 50% in 2020 to 41% in 2023.

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 an industry's ability to withstand competition and grow in the markets. It is relative in the sense that it is the result of competition with other players in the sector present in the market.

The French automotive industry must perform on a par with its global competitors to continue to grow. Among the factors affecting the competitiveness of the French industry are labour costs, which are notably linked to the burden of social security contributions on labour and which rose between 2000 and 2009, approaching German levels and thereby undermining the competitiveness of French manufacturers and their suppliers in France.

From 2012 onwards, the government introduced measures to boost competitiveness (CICE). Following the economic crisis linked to Covid, it continued this policy by halving the corporate value-added contribution (CVAE) and the business property tax (CFE), and by lowering the cap on the territorial economic contribution (CET) from 3% to 2% based on value added.

Nevertheless, the burden of social security contributions on labour in France remains one of the highest in the European Union, including within the eurozone, and under these conditions, the production in France of vehicles in the lower-end segment is no longer profitable, particularly when compared to countries such as Spain or those in Central and Eastern Europe.

Exchange rate movements are another key factor affecting the competitiveness of car manufacturers, given the significant share of production outside the eurozone. This accounted for 57% of external markets for passenger cars in 2024, compared with 47% in 2002. In 2024, the euro continued to appreciate against Asian currencies, weighing on its competitiveness.

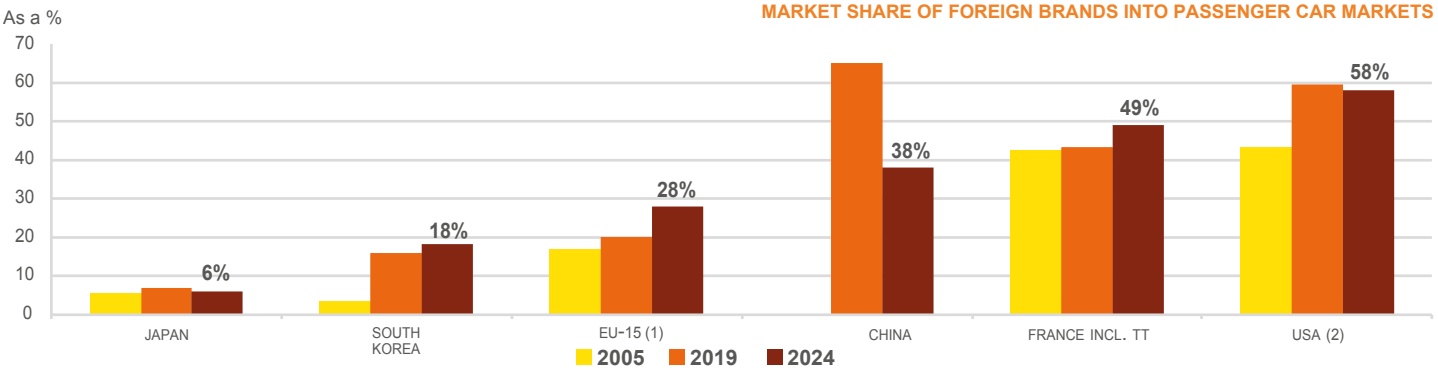
Finally, there are factors linked to market openness, whether domestic or external. The domestic market, known as the 'home market', provides a solid foundation for fuelling growth in foreign markets through international expansion and innovation. For the French automotive industry, the French market, and above all the European market, constitute this home market; it is open to competition, and non-European manufacturers hold a significant and steadily 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 broader home market on which to base their international development. Furthermore, Chinese manufacturers now hold a growing market share (62% in 2024, compared to 40% in 2019) in their domestic market, which is the world's largest and even more so in the case of electric cars.

In the EU, regulations impose significant additional costs both at the level of the production system (compliance, engineering, CSR reporting) and in the final price of the vehicle (new equipment, green materials). In this context, offering affordable vehicles is a difficult challenge for mainstream manufacturers.

2.9% **Share of production taxes in GDP in France in 2024, compared with 0.7% in Germany**

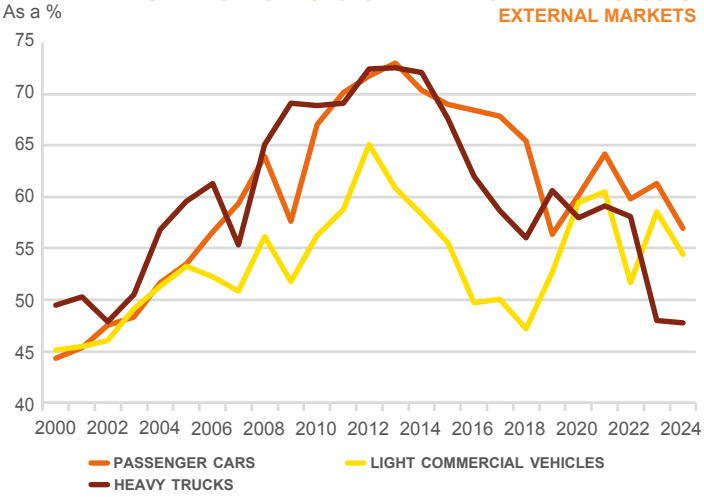
FACTORS AFFECTING THE COMPETITIVENESS OF THE FRENCH AUTOMOTIVE INDUSTRY

MARKET SHARE OF FOREIGN BRANDS INTO PASSENGER CAR MARKETS



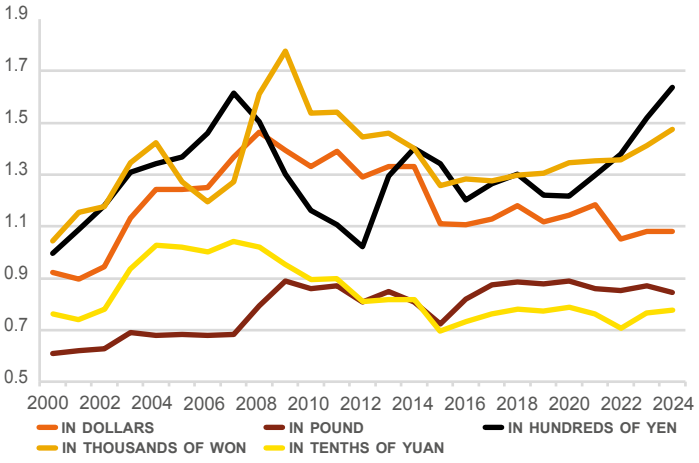
(1) Considered foreign brands are Japanese and Korean brands, Indian brands from 2014, Chinese brands and Tesla from 2022.
(2) Market share of foreign brands calculated on light vehicles.
Source: CCFA

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



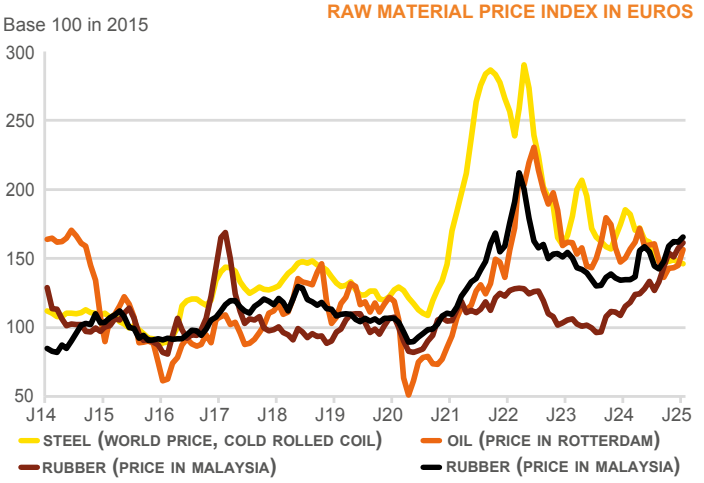
Source: CCFA

EVOLUTION OF EXCHANGE RATES: FOR ONE EURO

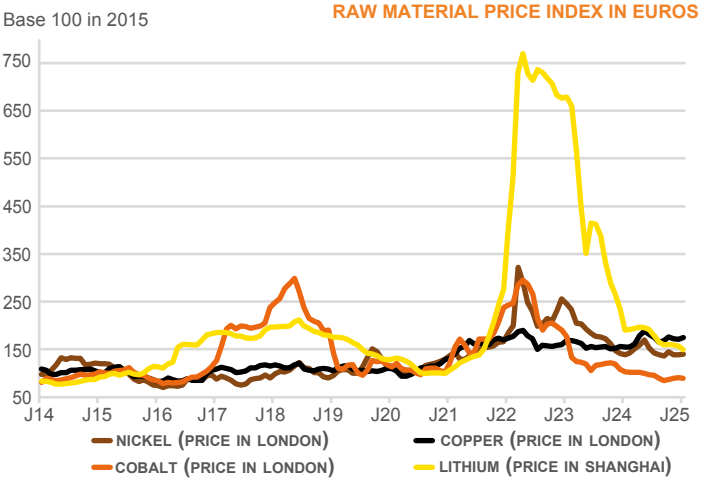


Source: ECB

RAW MATERIAL PRICE INDEX IN EUROS



RAW MATERIAL PRICE INDEX IN EUROS



Sources: Rexecode, Insee, CCFA calculations

+58% Increase in the average price of copper between 2019 and 2024

Prices of raw materials, as well as energy, can impact the production costs of user companies. These prices are subject to significant fluctuations, even within the same year. Expressed in euros, raw material prices saw significant increases between 2001 and 2012. Prices then hit a low point until the post-Covid recovery, which drove raw material prices to very high levels. Passing on these price fluctuations to final retail prices remains difficult in a context of intense competition and household spending trade-offs.

In 2021 and 2022, the main raw materials used in the automotive sector, such as steel and aluminium, saw sharp price rises, linked to the post-Covid recovery. In 2023, these prices trended downwards, linked to the slowdown in global demand, particularly from China, and the easing of inflation. In 2024, prices for certain materials rose again, such as aluminium (+21% year-on-year) and rubber (+45%). Conversely, prices for the main metals and materials used in battery production fell due to slowing demand and a more abundant supply (nickel, cobalt, lithium). On average, however, prices for all materials used by the automotive industry remain more than 30% higher than their 2019 levels.

Energy prices (gas, electricity) vary by region. According to research by Rexecode, electricity prices in Europe in 2022 (expressed in dollars per MWh) are nearly 2.5 times higher than in the United States and three times higher than in China. For natural gas, the price is three times higher in Europe than in the United States. As highlighted in the Draghi report, following the war in Ukraine, the price of gas in Europe is now three to five times higher than in the United States, which is undermining the competitiveness of European industry.

CONSOLIDATION OF THE AUTOMOTIVE SECTOR

2023 New strategic industry contract 2023–2027

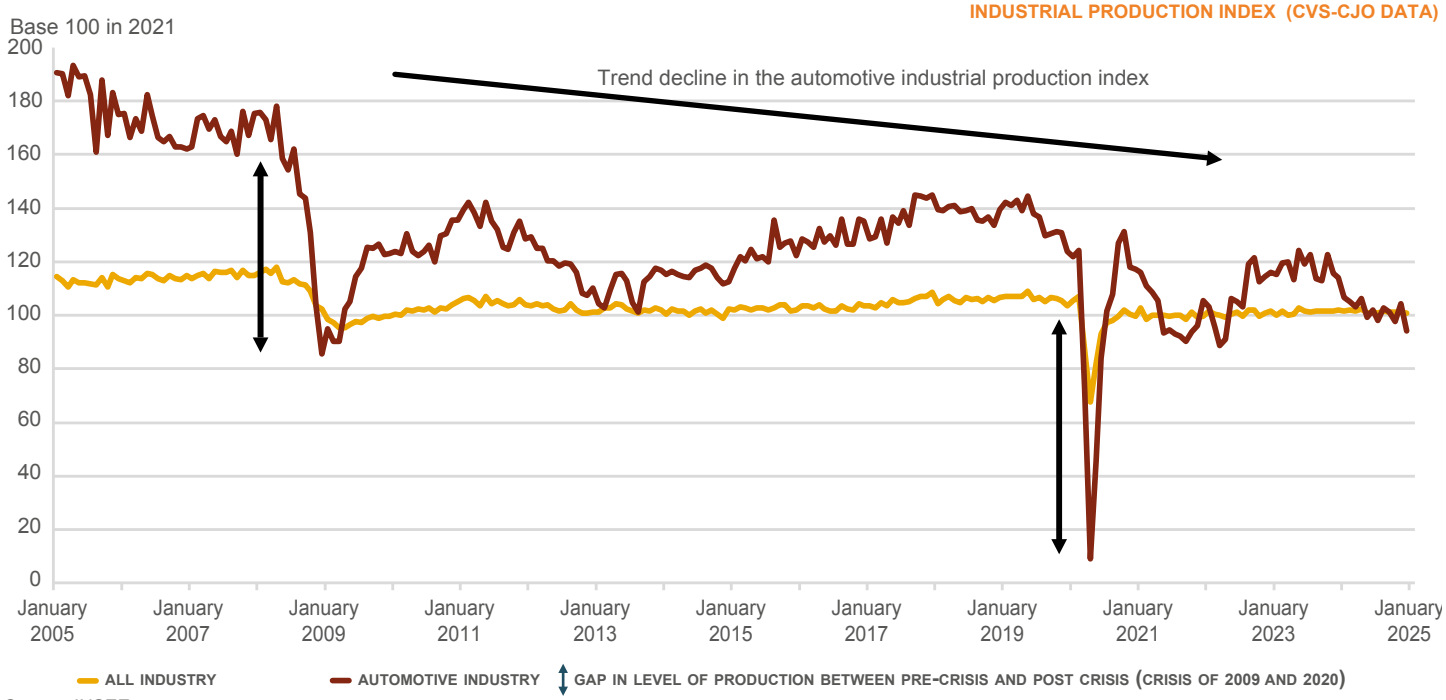
Over the last fifteen years, the automotive sector has had to consolidate in the face of several types of events. The first was the 2008–2009 crisis, which severely affected European markets and production in France. The industrial production index (IPI) for the automotive sector published by INSEE fell by an average of 25% annually in 2009 (-12% for industry as a whole). After a recovery, it fell again in 2013, before finally growing steadily until 2018. This growth came to a halt in 2020 with the health crisis, which resulted in a 28% annual average decline in the automotive IPI, compared with 10% for industry. Following a post-Covid rebound in the second half of 2020, automotive production fell again due to the semiconductor crisis and tensions over raw materials and only recovered in the second half of 2022. In 2023, as part of the move towards electrification, activity picks up (+11%). In 2024, demand, particularly for electric vehicles, slows down, against a backdrop of weak purchasing power and regulatory and fiscal uncertainties. The production index for the automotive industry in France falls by 14% on an annual average (compared with -0.1% for industry as a whole).

Against this challenging economic backdrop, the sector must also contend with major disruptions (technological, digital and societal) leading to a profound restructuring of the value chain (batteries, power electronics, hydrogen, mobility services, etc.). Companies must adapt to the decline in their traditional markets linked to combustion-engine vehicles and invest in new products, training the workforce in future technologies within a relatively short timeframe (the European target of a 100% reduction in CO_2 emissions from vehicle exhausts by 2035). They must also contend with the arrival of new entrants (Chinese firms) on the French and European markets, which enjoy significant comparative advantages within this new value chain.

Since 2009, the automotive sector has been organised around the Automotive Sector Platform (PFA), established by French automotive groups and their suppliers (FIEV, FFC, FIM, GPA, FFF, Elanova), brought together within the Automotive Suppliers Liaison Committee (CLIFA). Since 2010, the PFA has been supported at regional level by eleven Regional Automotive Industry Associations (ARIA), as well as by competitiveness clusters. It was consolidated in 2012 around the Automotive Technical Committee (CTA) and its two councils, the Automotive Technical Standardisation Council (CSTA) and the Automotive Research Council (CRA) and defined five research programmes.

Within the framework of the National Industry Council (CNI), the Automotive Sector Strategic Committee (CSF) was established. It brings together the entire sector, from upstream to downstream, including trade unions, as well as major research organisations. Following an initial roadmap signed for the period 2018–2022, a new sectoral strategic contract (CSF Auto) has been signed for the period 2023–2027. It incorporates the ambitious objectives set by European regulations, as well as by the government (SGPE planning), for the energy transition in road transport, with energy mix targets for 2027 covering passenger cars, commercial vehicles and heavy goods vehicles (lorries, 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 upstream to downstream (contraction in activity, loss of competitiveness, weakening of the industrial fabric), leading it to reorganise itself around the PFA to strengthen synergies. The successive crises of recent years (COVID, semiconductors, the war in Ukraine) and the acceleration of the sector's energy and digital transition are creating new challenges for the industry (carbon footprint reduction targets, competition from new entrants, control of value chains, and the cost of energy and raw materials).

Against this backdrop, a new sectoral agreement has been signed for the period 2023–2027. It identifies several key projects to which sector stakeholders, the State and the regions have committed, with a view to achieving carbon neutrality by 2050. These projects focus on major challenges such as increasing competitiveness and innovation to create value in France. They also aim to enhance the sector's attractiveness, develop skills and anticipate the retraining of employees across the regions. Issues of energy sovereignty, 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 vehicle fleet are also key drivers for achieving the objectives of reducing the carbon footprint of transport.

These structural projects, set out in the new sectoral contract, are intended to be rolled out across the regions, with the involvement of automotive and mobility competitiveness clusters and ARIA agencies, in close collaboration with regional councils and the State's regional development agencies. They form part of the momentum of Phase V of the competitiveness clusters, which are supporting companies and employees in the sector through the profound transformation currently underway.

INVESTMENT AND SUPPORT GRANTS FOR THE SECTOR

The automotive sector requires significant physical investment (production sites, etc.) that is amortised over long periods. During their design phase and prior to market launch, vehicles also require work spanning several years in research centres, as part of a continuous improvement process, to meet societal demands, whether related to safety, the environment (decarbonisation of transport) or new digital challenges (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 secure during periods of crisis or transition and require support mechanisms, particularly from public authorities.

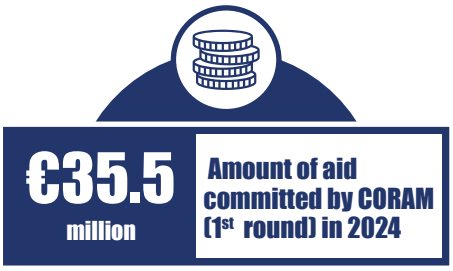
One of the first measures to support research, development and innovation was the introduction, in 1983, of the Research Tax Credit (CIR). This tax measure is designed to support companies in their R&D efforts and thus helps to bridge the gap in fiscal and social competitiveness between France and other major countries where manufacturers operate. 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% under the innovation scheme. Over the 2018–2022 period, the sector received €1.85 billion under the CIR, with an increase in the number of beneficiary SMEs thanks to the CIR Innovation.

Following the 2009 financial crisis, the government also introduced structural instruments to promote long-term financing, notably through the creation of the Automotive Equipment Manufacturers' Modernisation Fund, which became the Automotive Future Fund (FAA) in 2015. Funded by the sector's major players and managed by Bpifrance, it aims to accelerate the growth and innovation capacity of French automotive suppliers. With an initial budget of €525 million over 15 years, it was increased to €600 million as part of the automotive recovery plan.

State support for the sector also takes the form of grants awarded, in particular, following calls for projects (CFP), as part of the Investment for the Future programmes (PIA), and the 'France Relance' and ''France 2030'' programmes, launched in the wake of the COVID crisis to support R&D and innovation and assist stakeholders facing changes in the automotive sector. As of 31 December 2024, support for modernisation investments in the automotive sector funded by the recovery plan amounted to €403 million for approximately 440 projects. The CORAM (Steering Committee for Automotive Research and Mobility) calls for projects specifically support R&D by accelerating the market launch of service technologies and/or sustainable mobility solutions.

Finally, the "France 2030" plan has allocated a budget of €4.8 billion to the automotive and road transport sectors. As of 31 December 2024, €3.8 billion had been committed, including €2.5 billion for the battery sector.

In total, between 2018 and 2024, approximately €5 billion in grants and repayable advances has been awarded to the automotive sector under national and European schemes, and €1 billion to "electronic" and "digital" projects with automotive applications.



► INVESTMENT AND SUPPORT FUNDS FOR THE AUTOMOTIVE INDUSTRY

	Objectives and attributions
Fonds Avenir Automobile 2 (launched in November 2020)	Following on from FAA 1, launched in 2009 and now at the end of its investment period, FAA 2 – launched by Renault, PSA and Bpifrance – forms part of the 2020 recovery plan. Managed by Bpifrance and with a budget of €525 million, it aims to accelerate the growth and innovation capacity of French automotive suppliers. 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 subcontractor groups, whilst the remaining 20%, or up to €105 million, will be invested in funds of funds (private investments and complementary to the FAA 2). As at 31 December 2024, subscribers had been called upon to contribute 26% of their total commitment to the fund, amounting to €85.8 million.
Support and retraining fund for employees in the automotive sector	Established on 17 June 2021, the fund is intended to finance exceptional support and retraining measures for employees made redundant for economic reasons 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 retraining measures are entrusted, on behalf of the State, to Pôle Emploi. Its extension was approved in June 2023 to allow employees from new companies to join the scheme until June 2024.
AAP CORAM 2024	Support for research and innovation projects relating to technologies, services and/or solutions in the field of mobility across various areas (zero emissions, vehicle environmental performance, connected and automated vehicles and mobility services, data-sharing systems, etc.). This call for projects, which has been renewed for 2024, has already supported 60 projects since its launch in 2020, with €393 million in grants for €1.2 billion in investment. In 2024, six successful applicants were selected for €75 million in research and development investment and received €35.5 million in state funding via France 2030.

Source: Bpifrance

As part of the automotive support plan launched by the government in May 2020 to help the sector restructure and weather the economic crisis linked to COVID-19, two main funding streams were announced. The first, the Fonds Avenir Automobile 2, is dedicated to suppliers, building on the FMEA, and aims to provide new investment capacity, in the form of equity and quasi-equity, to help them cope with the crisis and accelerate their capacity for innovation in key technologies for the connected and carbon-neutral car of the future. The second major initiative is the Call for Expressions of Interest, which forms part of the fourth Programme d'investissements d'avenir (PIA4) and aims to support projects selected under the CORAM programme. These initiatives also form part of the "France relance" and "France 2030" programmes.

In 2024, six winners of the "CORAM 2024" call for projects received €35.5 million in state funding for projects totalling €75 million in research and development investment. The "CORAM 2025" call for projects will follow on from CORAM 2024 to provide cross-cutting support to all players in the automotive value chain, and more broadly the road mobility ecosystem, to launch innovation projects that will accelerate the transition to the vehicle of tomorrow.

The France 2030 automotive investment support call for projects is also being renewed in 2024 to support projects for the industrialisation of components dedicated to the vehicles of tomorrow and the modernisation of subcontractors' industrial facilities (€577 million in investment, including €100 million in public funding awarded to 49 successful applicants). Furthermore, a specific section of the Invest Call for Projects (CFP) is also dedicated to decarbonisation and environmental performance improvement projects for sites and products.

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

Finally, to support employees, a new Call for Expressions of Interest entitled "Skills and Jobs of the Future" (CMA) has been launched to develop employment and skills, in order to address the major challenges of tomorrow. As for the special fund to support and retrain employees made redundant for economic reasons by subcontractors in difficulty, it has been extended until 30 June 2024.

RESEARCH AND DEVELOPMENT EXPENDITURE IN THE AUTOMOTIVE SECTOR

€5.8 billion **Total domestic and international research and development expenditure in the automotive sector in 2023**

In 2023, 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 aerospace construction.

This innovation expenditure amounted to €4.3 billion, representing 11% of total domestic R&D expenditure by companies. Affected by the health crisis, it had fallen in 2020 and 2021 but is set to rise by 2% in 2023 (+9% compared to 2021). External research and development expenditure (DERDE), which had fallen by 40% between 2019 and 2021, rose by 9% in 2022, but stagnated in 2023 at €1.4 billion. It is therefore still 36% below pre-crisis levels. It accounts for 11% of total corporate DERDE.

Manufacturers must invest heavily, not only to satisfy customers and comply with regulatory standards, but also to meet the targets set by the initiative relating to the energy transition, particularly regarding electrification, and to develop mobility and connectivity services. From 2015 onwards, total R&D expenditure rose steadily to reach €7 billion in 2019. Over the last five years, the sector has invested around €30 billion in innovation, including €22 billion in R&D, which has also had a knock-on effect on its suppliers, such as plastics and electronics companies, etc.

The 2009 crisis had significantly limited companies' financial resources; however, domestic research and development (R&D) expenditure fell by only 2% in 2009 and 2010, highlighting its vital and long-term nature. With the 2020 crisis, the decline in expenditure was more pronounced, with the discontinuation of certain programmes related to combustion-engine vehicles, against the backdrop of a ban on such vehicles by 2035. However, in 2022, expenditure began to rise again due to investment needs in vehicle electrification and connectivity. The automotive sector remains the one that files the highest number of patents, with manufacturers Renault and Stellantis featuring among the top patent filers.

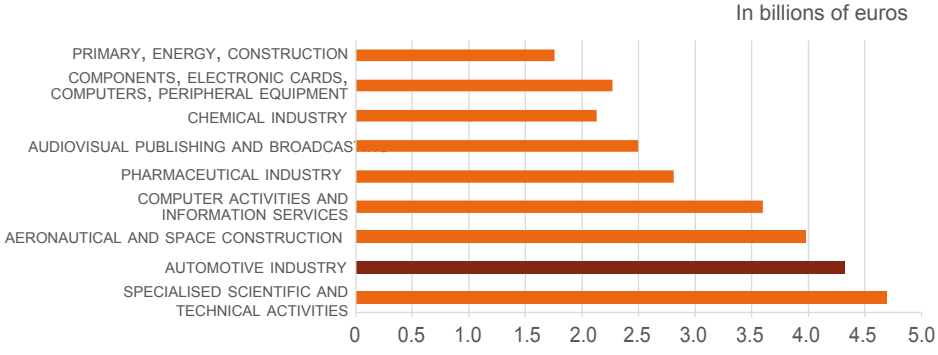
In Europe, the automotive sector is also the biggest spender on research and development, with, according to ACEA figures, €85 billion spent in 2023, representing a third of the EU's total R&D expenditure.

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

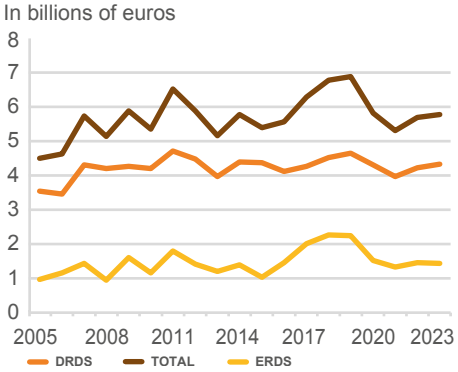
	DRDS in 2023 (2)		ERDS (3) in 2023	
	in millions of euros	as a % of total	in millions of euros	as a % of total
Specialised scientific and technical activities	4,692	12%	1,170	9%
Automotive industry	**4,324**	**11%**	**1,446**	**11%**
Aeronautics and space construction	3,980	10%	3,842	29%
Computer activities and information services	3,596	9%	281	2%
Pharmaceutical industry	2,812	7%	2,343	17%
Audiovisual publishing and broadcasting	2,494	6%	403	3%
Chemical industry	2,130	5%	453	3%
Components, electronic cards, computers, peripheral equipment	2,267	6%	314	2%
Primary, energy, construction	1,754	4%	463	3%
Manufacture of electrical equipment	1,664	4%	569	4%
Manufacture of instruments and devices for measuring, testing and navigation watch-making	1,747	4%	221	2%
Manufacture of machines and equipment not included elsewhere	1,500	4%	280	2%
Manufacture of telecommunications equipment	1,209	3%	103	1%
Other branches	6,459	16%	1,585	12%
TOTAL	**40,630**	**100%**	**13,473**	**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 2023 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 Statistics (Ministry of Higher Education, Research and Innovation) conducts surveys on R&D expenditure by businesses and the wider public sector. From 2008 onwards, the data has been published using a new classification of economic activities. The total R&D budget is broken down into domestic expenditure (DIRDE), which corresponds to work carried out in France, regardless of the source of funding, and external expenditure (DERDE), corresponding to R&D work commissioned from other companies or public research bodies; part of the latter expenditure may be carried out abroad.

In 2023, automotive sector companies based in France employed 22,510 full-time equivalent staff in R&D (including 15,571 researchers). These staff numbers have fallen by 32% compared with 2003, but the number of researchers has risen by 13% over the same period. However, since the COVID crisis, the number of researchers has fallen by 23% (and by 27% for total R&D staff).

According to the National Institute of Industrial Property (la Propriété Industrielle, INPI), Stellantis ranked first among patent applicants in 2024, with the Renault Group in sixth place. In total, four companies from the automotive sector featured 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, within a clearly defined geographical area and around a specific theme, companies (large groups and SMEs/mid-cap firms), research units and training centres with a view to collaborative projects. Their role is to act as a lever for the competitiveness of the French economy by enhancing its capacity for innovation and encouraging firms to establish and organise themselves within their regions. To mark the 20th anniversary of the competitiveness clusters, their impact on corporate R&D expenditure was highlighted: every euro of public funding mobilised under this policy generates three euros of investment in the private sector. Over the past 20 years, the clusters (across all sectors) have supported 28,000 projects and brought together 20,000 businesses and 2,500 research and training centres. The 53 active clusters have an average of 400 members, 80% of whom are SMEs. Over this period, they have mobilised €55 billion in public and private funds. Beyond the research aspect, competitiveness clusters also help to boost companies' exports and strengthen employment.

Phase V of the clusters (2023–2026) has resulted in the accreditation of 55 clusters, including the four automotive clusters. This new phase has three objectives: to foster connections and collaboration between stakeholders in regional economic and industrial ecosystems, in line with regional priorities; to expand the markets and networks of SMEs through the clusters' activities at European level; and to support innovative companies in their ecological and digital transition.

The automotive competitiveness clusters have developed their areas of focus around innovation, skills, networking and the commercialisation of new solutions, with a view to improving the competitiveness of their members. They are associate members of the automotive sector's umbrella organisation: the PFA, Filière Automobile et Mobilités.

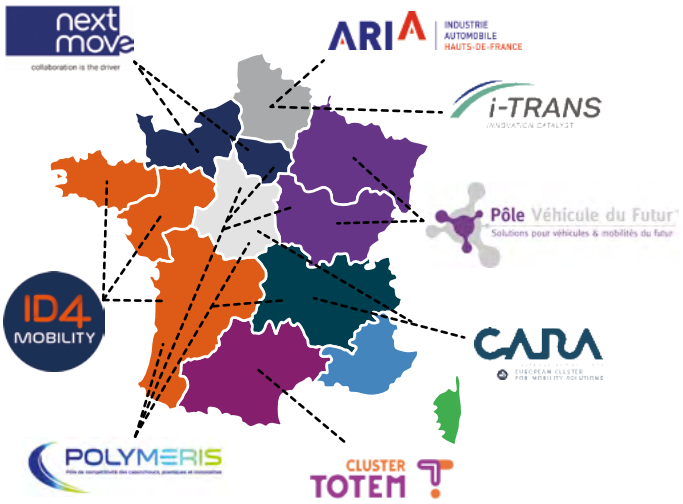
2,000 **Projects certified by automotive competitiveness clusters since their creation 20 years ago**

► 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	645	334	400
Number of funded pro-jects	320	302	189	-
Year of creation	2006	2005	2005	2006
Total amount of funded projects (in €M)	320	1 343	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 2024, the automotive industry continued its research and development efforts through the clusters. Within these clusters, it is mobilised to address the challenges of industrial excellence and sustainable mobility. The initiative is cross-sectoral and brings together manufacturers, equipment suppliers, innovative SMEs and mid-cap companies, research laboratories and training organisations, including universities.

The NextMove cluster (formerly Mov'eo), established in 2006, brings together the key players in the automotive and mobility industry. It covers the Île-de-France and Normandy regions. Its four drivers of innovation are low-environmental-footprint mobility, 'safe, autonomous and connected' mobility, 'new mobility services and solutions', and industrial and operational excellence. The cluster leads and represents "Mobility Valley", a region of European excellence where solutions to meet the mobility challenges of the future are invented, developed, tested and industrialised. During Phase V, NextMove's mission is to consolidate the European dimension of its work and to address the innovation challenges driven by the sector, as well as 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 clusters. The cluster supports businesses in entering new mobility markets and the industry of the future, with a mission to stimulate innovation, improve business performance, support the upskilling of teams, and assist businesses in their development and growth. In Phase V, the cluster implements regional and national policies on the following themes: decarbonisation and the green transition, hydrogen, electrification and Industry 4.0. Discussions are already underway for Phase VI to continue the Cluster's work, focusing on markets (automotive, commercial vehicles, rail, motorsport, soft mobility), the industrial transformation of businesses, support for new jobs and skills, and expanding its activities to foster new sectors.

The CARA cluster's ambition is to support the transformation of passenger and freight transport systems in the Auvergne-Rhône-Alpes region. It supports six sectors: commercial vehicles, the automotive sector, cable transport, inland waterway transport, active and sustainable mobility, and rail. CARA implements collective initiatives: research and innovation projects, real-world demonstrators, and initiatives for the economic and industrial development of its members. Its activities are structured around five research programmes: energy (energy management and conversion for mobility), safety and security, vehicle architecture, transport systems and intelligence, and mobility (practices and governance).

Based in western France (Brittany, Pays de la Loire, Nouvelle-Aquitaine), the role of iD4MOBILITY (formerly ID4CAR) is to foster collaborative dynamics to harness innovation for the transition of land-based mobility. 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 cluster dedicated to land-based mobility in all its forms (vehicles, services, infrastructure or industry).

Clusters other than those specialising in the automotive sector may find opportunities in this sector, such as those working on materials, rubber, plastics, mechanics or mobility. Polymeris is the competitiveness cluster for rubbers, plastics and composites, operating in six regions with 600 active members and 381 projects funded since its creation. Its three main strategic priorities are the digital factory, the circular economy and advanced materials. Based in the Hauts-de-France region, i-TRANS defines itself as the cluster for decarbonised and connected mobility. Its work now focuses on four priority sectors: rail, the automotive industry, aeronautics and the industry of the future. TOTEM, which stands for Transport d'Occitanie Terrestre Et Maritime, is the smart and sustainable mobility cluster in Occitanie. It works with the rail, maritime and automotive sectors and has 160 members.

AUTOMOTIVE FOREIGN TRADE

In 2024, France's trade balance, while still in deficit, continues the recovery that began in 2023, improving by €19 billion to stand at -€81 billion (FAB/FAB balance). This improvement is mainly due to a fall in imports (-4.5%, following -7.1%) of energy products and manufactured goods, and is linked more to a fall in prices than to a fall in volumes. Exports are also down, but by a smaller margin (-1.6%), following three years of growth. The decline in exports is also linked to a fall in prices, but also to a slight drop in volumes, particularly in electronic components and transport equipment. Conversely, whilst exports of energy products fell due to lower prices, electricity exports by volume reached a record high.

Exports from the automotive industry fell by 8.9% to €52.4 billion. Exports of new cars fell by 13% to €17 billion; those of light commercial vehicles by 3.9% to €5.9 billion; and those of industrial vehicles by 9.8% to €6.4 billion. Exports of parts (including engines, chassis, bodywork and trailers), meanwhile, fell by 6.6% to €22.9 billion. When combined with exports of used vehicles, which surged by 30% to €4 billion, total exports from the automotive sector amounted to €56.4 billion in 2024, a decrease of 6.9% compared with 2023. They now account for just 9.6% of total French exports, valued at €590 billion, placing the automotive industry in third place, behind the agri-food sector (10.9%) and the aerospace sector (9.7%).

As for imports, these also fell in 2024 across all vehicle categories, including used cars. Imports of electric cars, which account for nearly a quarter of new car imports by value, fell sharply (-19.5%) following the introduction of the eco-score in France and the imposition at European level of anti-subsidy duties on Chinese electric vehicles. Imports of light commercial vehicles and industrial vehicles also fell sharply in 2024, by 14% and 19.6% respectively. Imports of parts, engines, bodywork and trailers, meanwhile, fell by 6.1%.

Overall, the trade balance for the automotive industry remained relatively stable at -€28 billion. It widened slightly for passenger cars (-€1 billion), except for electric cars (+€1.6 billion). Conversely, the balance for light commercial vehicles and industrial vehicles, which was already in surplus, improved (+€0.5 billion). For parts, engines and bodywork, the balance remains in deficit but has improved slightly (+€400 million). The deficit in the automotive manufacturing sector stands at -€27.6 billion in 2024, reflecting the lack of competitiveness of France as a production location.

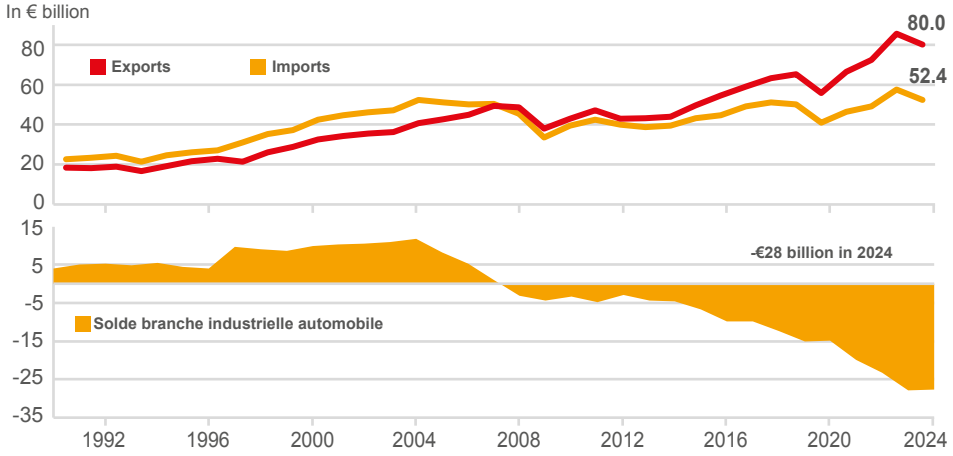
► FOREIGN AUTOMOTIVE TRADE
(IN BILLIONS OF EUROS)

	New cars	Including electric cars	New light commercial vehicles	New heavy 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%
2023	19.7	2.7	6.2	7.1	24.5	57.5	3.1	60.6	597.1	10.1%
2024	17.2	2.5	5.9	6.4	22.9	52.4	4.0	56.4	587.6	9.6%
Variation 2024/2023 in %	-13.0	-7.5	-3.9	-9.8	-6.6	-8.9	+30.1	-6.9	-1.6	-
IMPORTS (CIF)										
2019	32.9	1.0	4.5	5.2	22.7	65.3	1.6	66.9	575.7	11.6%
2023	40.4	9.3	5.2	6.0	33.9	85.5	1.8	87.3	719.7	12.1%
2024	38.9	7.5	4.4	4.9	31.8	80.0	1.5	81.5	687.8	11.9%
Variation 2024/2023 in %	-3.8	-19.5	-14.0	-19.6	-6.1	-6.4	-13.8	-6.6	-4.4	-
BALANCE										
2019	-13.0	+0.1	+0.6	-0.5	-2.3	-15.1	-0.0	-15.1	-78.9	-
2023	-20.7	-6.6	+1.0	+1.0	-9.3	-28.0	+1.3	-26.7	-122.6	-
2024	-21.8	-5.0	+1.5	+1.5	-8.9	-27.6	+2.5	-25.2	-100.2	-

(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

Exports from the automotive industry stood at over €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. Since then, they have been rising steadily but are set to fall for the first time in 2024. The model renewal cycle for vehicles produced in France explains the decline in passenger car exports, despite a European market that remained stable in 2024. At the same time, imports, despite a decline in 2009 and 2020, grew faster than exports, but also fell for the first time in 2024. The automotive trade balance had begun to deteriorate as early as 2004, linked to the unfavourable trend in tax and social security contributions and labour costs in France compared with other European countries, and had turned negative in 2007. Subsequently, it continued to widen, despite the rebound in vehicle exports from 2016 onwards, driven by the dynamism of the European market and, for light commercial vehicles, the production of new vans in France (including for foreign partners). In 2024, the deficit stabilised at €28 billion.

EVOLUTION OF TRADE IN THE AUTOMOTIVE INDUSTRIAL SECTOR



Sources: Customs data processed by the CCFA

As regards trade in parts and other automotive products (bodywork, chassis, trailers, engines), the balance remained in surplus until 2018. Then, against the backdrop of France's declining competitiveness, imports grew much faster than exports, generating a deficit that reached a record high in 2023 and stood at €8.9 billion in 2024. The energy transition is driving demand for equipment to produce electric vehicles (notably batteries, which are not yet mass-produced in France), which is exacerbating this imbalance.

€52 billion **Exports of automotive industrial products from France in 2024**

FRENCH AUTOMOTIVE FOREIGN TRADE

The main customers of the French automotive industry are generally European. In 2024, France's top five customers are Western European countries, accounting for 57% of exports from the automotive manufacturing sector, a share that has risen compared to last year. Among the top ten customers for French automotive exports, in addition to Western European countries, there are countries from Eastern Europe or the wider European region, such as Poland and Turkey.

For new passenger cars, the main markets are traditionally the four largest in the European Union (Germany, Spain, Italy, Belgium) and the United Kingdom. French exports of new passenger cars are set to fall in 2024 to most major partner countries. The Netherlands and Poland, whose markets are growing in 2024, are seeing an increase in their import volumes from France. Germany, which has seen a sharp fall in its imports of passenger cars from France over the past two years, finds itself in third place behind Belgium (which includes flows linked to port activity) and Italy. The United States ranks 11th in terms of value among France's customers for passenger cars, despite relatively low volumes.

Light commercial vehicles, meanwhile, continue to be exported mainly to the same five countries. However, here too, Germany is no longer in the lead, having been overtaken by Belgium (€1.1 billion) and the United Kingdom (€973 million). Poland is now in fifth place behind Spain.

Exports of commercial vehicles and coaches and buses fell in both volume and value in 2024, standing at €6.4 billion. Germany remains France's leading customer in this market, followed by Spain, Italy and the United Kingdom. France recorded an increase in the value of its exports to Germany and Italy, but a decline in volumes. For other markets, the decline was observed in both volume and value. Finally, for the second consecutive year, Turkey emerged as France's fifth-largest customer in this market, ahead of Poland.

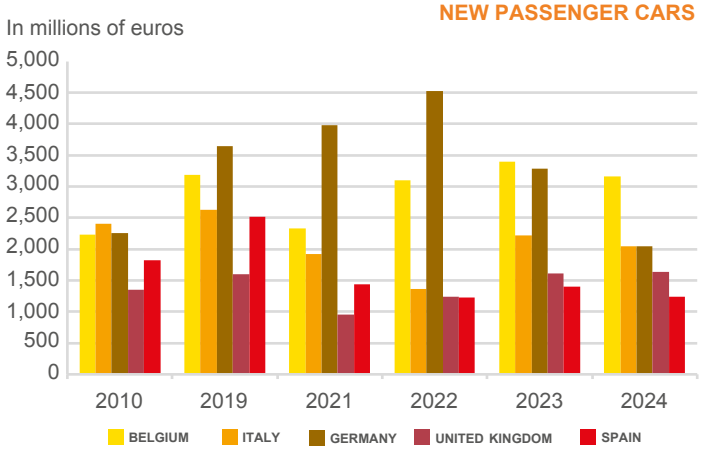
In the market for parts, engines, trailers and bodywork, where the value of exports is set to reach €23 billion in 2024 (down 7% on 2023), the top five destinations are European countries. Germany leads the way with 18% of French exports, worth €4.2 billion, down 17% compared to 2023. It is followed by Spain, which accounts for 15% of the total, or €3.4 billion, down 5%, and the United Kingdom (9%), which totals €2 billion (down 8% compared to 2023). Italy and Belgium rank fourth and fifth, accounting for 7% and 6% of French exports respectively, between €1.4 and €1.5 billion. The other countries receiving parts and accessories from France are mainly in Central and Eastern Europe (Poland, Slovakia, Romania, Hungary), but also Turkey, Morocco and the United States, which ranks as the 9th largest customer by value.

Exports of motors from France amount to nearly €2 billion, representing 9% of the total. Whilst Germany is the leading customer in the parts and accessories market, Spain tops the list of customers in the motors market, largely due to exports of electric motors. In 2024, France's exports of electric motors amount to €300 million, up 13% on 2023, with more than half (55%) destined for Spain. Finally, it is to the United Kingdom, followed by Belgium, that France exports the most chassis and bodywork, with total exports amounting to €376 million in 2024.

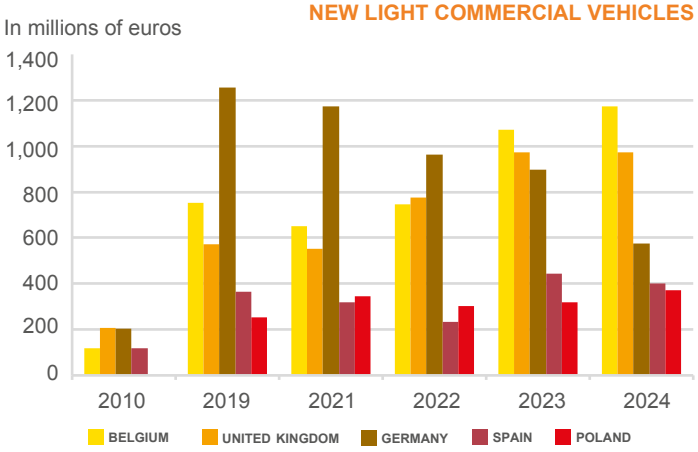
Germany — **France's leading trading partner in the automotive industry**

► MAIN DESTINATIONS OF AUTOMOTIVE EXPORTS FROM FRANCE

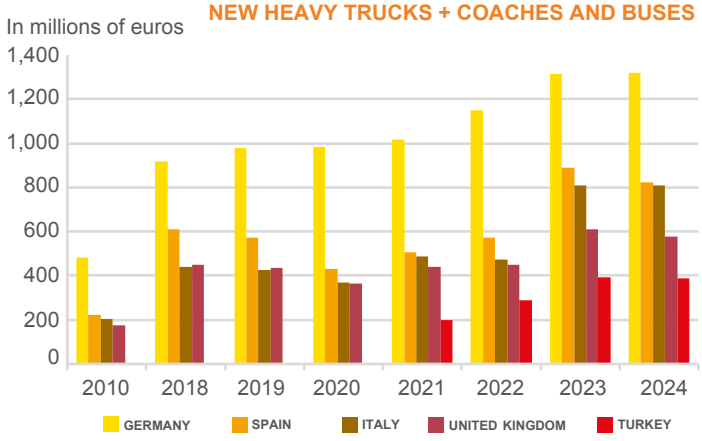
NEW PASSENGER CARS



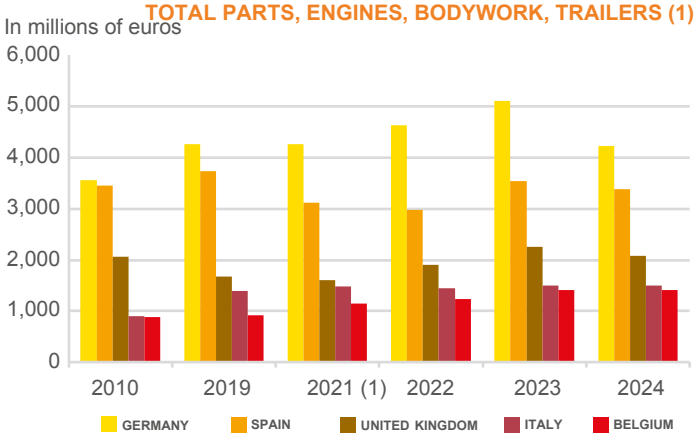
NEW LIGHT COMMERCIAL VEHICLES



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; however, the top five supplier countries account for 54% of the automotive industry's imports, a concentration now identical to that observed for exports. The top five include Germany, Spain and Italy, as well as China, which has now overtaken Italy, and the Czech Republic in fifth place. Turkey and Morocco also feature among the top ten vehicle suppliers, alongside Slovakia, Poland and Romania.

France imported €39 billion worth of passenger cars in 2024, mainly from Germany (23%) and Spain (20%). While Spain leads in terms of import volume, Germany, which benefits from its many premium brands sought after by French consumers, is the leading supplier by value (€8.9 billion, up 12% compared to 2023). China, which ranked third by volume in 2023, has seen its exports to France fall by 26% and has plummeted to eighth place among supplier countries. The introduction of the eco-score and anti- -subsidy duties on Chinese electric vehicles by the EU has caused imports of these vehicles from China to fall by 50% compared to 2023. Electric cars, which accounted for 85% of imports from China in 2023, now account for just 60%. Conversely, the number of electric cars from Germany has increased by 60%. Germany has thus become France's leading supplier of electric cars in 2024, accounting for 29% of volumes and 42% of value.

For light commercial vehicles, Italy ranks first by volume among supplier countries, accounting for 19% of imports, but Germany ranks first by value (19% of the total amount). Spain and Turkey are in third and fourth place respectively, both by volume and by value

For heavy goods vehicles, Germany leads the way and, in 2024, accounts for 24% of the volume and 38% of the value of imports, amounting to €1.85 billion, down 20% compared to 2023. Belgium, which was in second place, is now well behind the Netherlands and Turkey, accounting for 13% and 12% of the total value respectively.

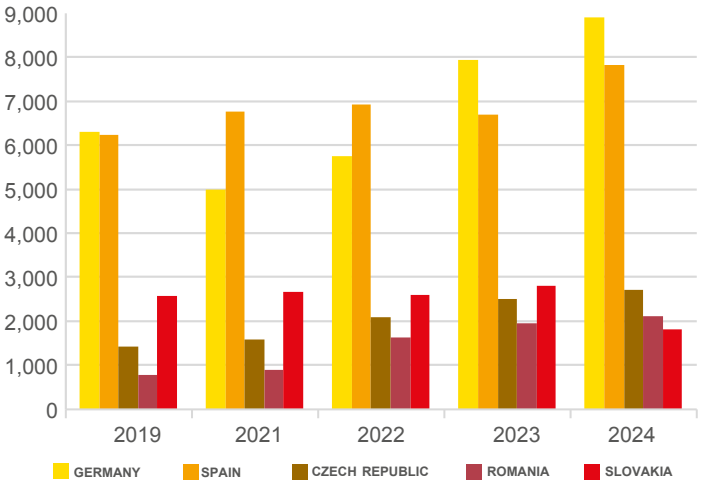
As for imports of parts and accessories, engines, bodywork and trailers, these amount to €32 billion in 2024, down 6% compared to 2023. 'Parts and accessories', with €30 billion in imports, constitute the main category. In 2024, Germany remains France's leading supplier, accounting for 18% of total imports, though this is down 9% compared to 2023. Conversely, China continues to gain market share. It accounts for 10% of imports, compared with 8% last year. It is followed by Poland (9%) and Spain (8%).

As for imports of electric motors, these remain very modest and fell by 9% in 2024. Germany, accounting for a third of imports, followed by Italy, is France's leading supplier. China ranks only third.

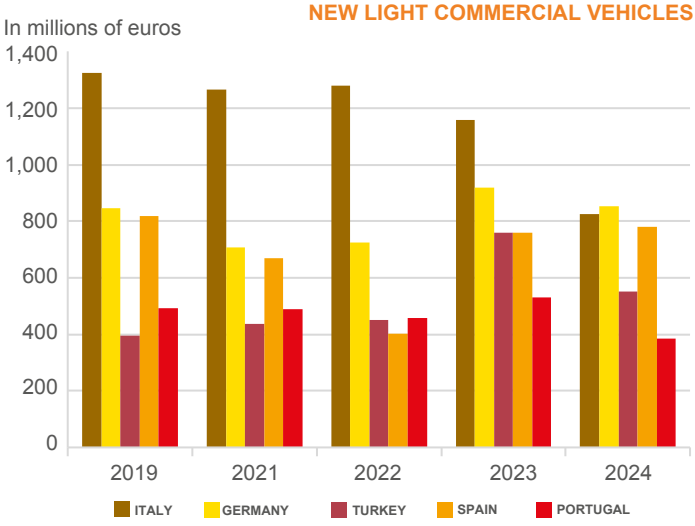
China — **France's third-largest supplier in the industrial automotive sector in 2024**

► MAIN SOURCES OF AUTOMOTIVE IMPORTS IN FRANCE

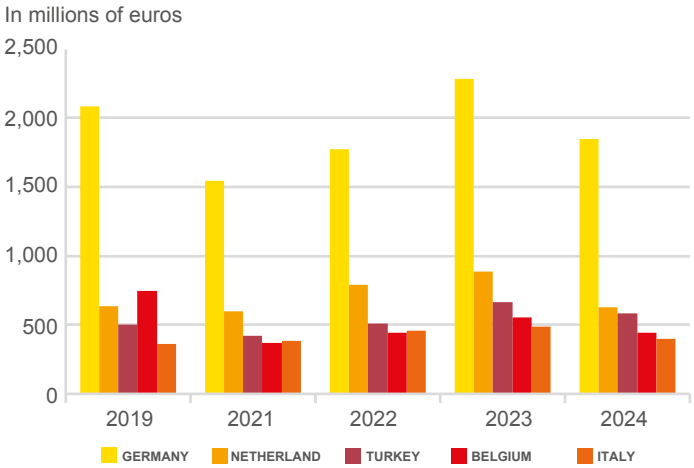
NEW PASSENGER CARS



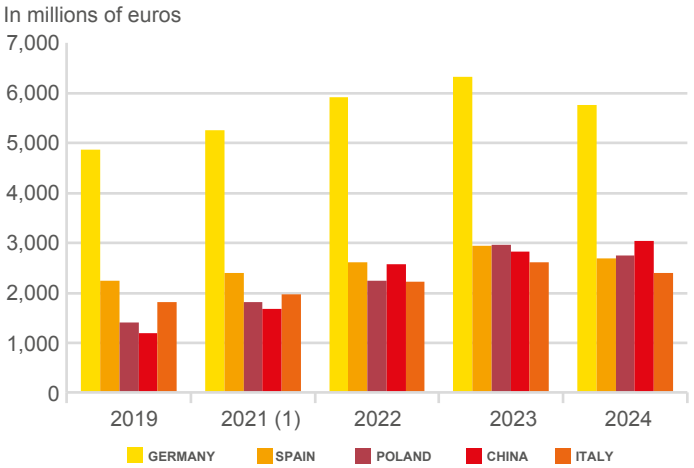
NEW LIGHT COMMERCIAL VEHICLES



NEW HEAVY TRUCKS + COACHES AND BUSES



TOTAL PARTS, ENGINES, BODYWORK, TRAILERS



Sources: Customs data processed by the CCFA

NEW PASSENGER CARS

In 2024, new passenger car registrations in France stood at 1.7 million units, down 3.2% compared with 2023. For the fifth consecutive year, the French car market has fallen below the symbolic two-million-unit mark, which was its average level over the 2000–2019 period. This level had never fallen so low, despite the two severe economic crises in 2008–2009 and then in 2013. Between 2000 and 2011, an average of 2.15 million cars were registered, compared with 1.99 million between 2012 and 2019 and 1.67 million between 2020 and 2024. Over the most recent five-year period, the number of registrations was the same as in the four years between 2000 and 2011.

In 2009, the impact of the global crisis was mitigated by market support measures (scrappage schemes, incentives). Registrations did, however, decline between 2010 and 2014, against the backdrop of the unstable European debt crisis. Nevertheless, the market recovered from 2014 onwards and experienced growth that was only interrupted by the health crisis. In addition to the lockdowns of 2020–2021, which brought automotive sales and production to a halt, the COVID crisis highlighted, in the period that followed, other factors undermining the automotive markets, and in particular the interdependencies between economies that weigh on supply and production.

Thus, whilst previous crises were mainly linked to the economic climate and its impact on factors driving car demand (purchasing power, household confidence, cost of credit), the crisis observed since 2020 is also attributable to supply-side factors. In 2021–2022, the market was notably disrupted by disruptions in supply and production chains, leading to longer delivery times. Global geopolitical instability has also had an impact on energy and raw material prices, driving up the cost of vehicles. Furthermore, regulatory requirements for vehicles and the emergence of more expensive electric cars have exacerbated the rise in the average price of cars.

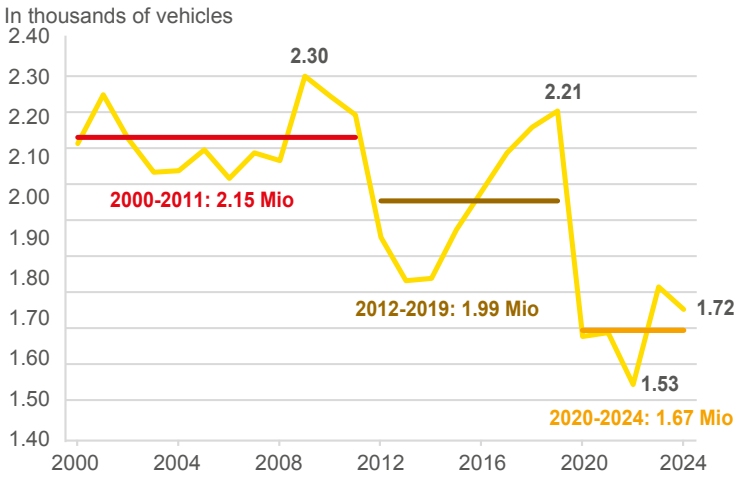
The targets of carbon neutrality by 2050 and the phase-out of internal combustion engines by 2035 in Europe imply a rapid transition towards vehicle electrification. Public policies designed to support this transition have at times led to a wait-and-see attitude among consumers, who are unsure which engine type to choose. These developments have also impacted the market in recent years.

France is a replacement market in which new registrations serve to replace vehicles in the fleet that are reaching the end of their life. In a mature market, as the French market was before 2012, new car registrations accounted for 6% of the fleet, meaning a complete renewal of the fleet took 16 years. Now, the replacement rate is just 4%. It therefore takes nearly 23 years to completely renew the vehicle fleet. This ratio slows the uptake of technological innovations, both in terms of road safety and environmental performance.

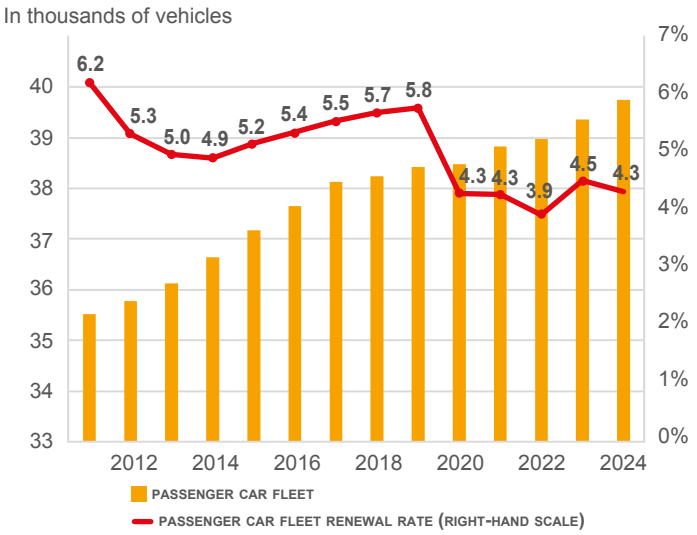
The market for new passenger cars in France is divided into two customer categories: private individuals (households) and non-private customers (companies, public authorities, automotive professionals). The share of private individuals has been falling steadily since the 1990s with the growth of the market for company cars, short-term rentals, etc. The ratio fell from 77% in 1990 to 63% in 2010, and is set to drop to 46% by 2024.

1.7 million **New passenger cars sold in France in 2024**

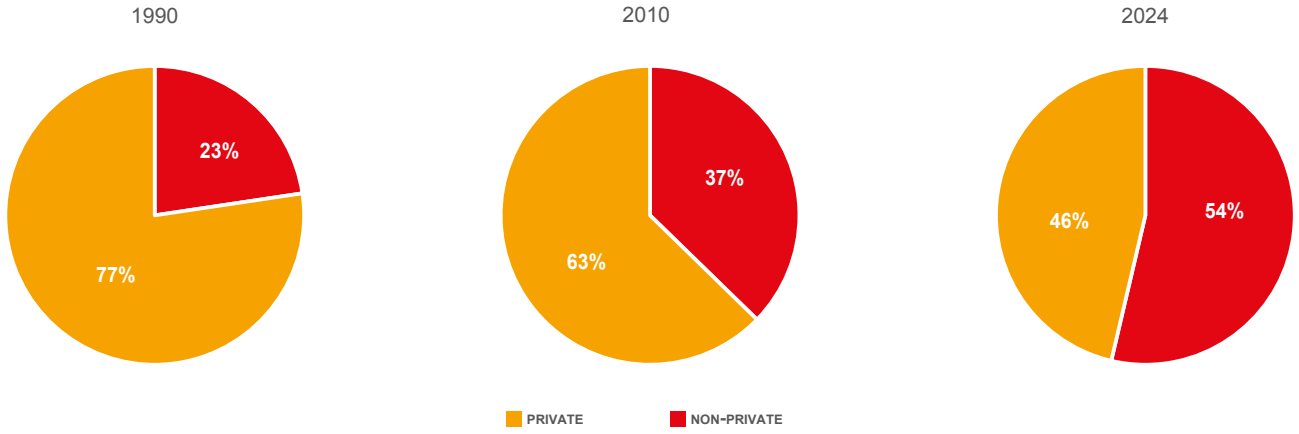
REGISTRATIONS OF NEW PASSENGER CARS IN FRANCE



PASSENGER CAR FLEET AND RENEWAL RATE



BREAKDOWN OF NEW PASSENGER CAR REGISTRATIONS BY CUSTOMER CATEGORY (PRIVATE / NON-PRIVATE)



PASSENGER CARS BY ENERGY

In 2024, sales of new passenger cars fitted with a diesel engine continued to decline (-27.2%) and now account for just 7% of the total. This share, which had peaked at 73% in 2012, has therefore fallen tenfold in less than fifteen years. Furthermore, sales of petrol cars, which had rebounded slightly in 2023, fell by 20% in 2024. They now account for just one-third of registrations, compared with 40% last year.

For the first time since their market launch, electric car sales fell in 2024 (-2.6% to 290,614 units) due to an economic climate unfavourable to the market, but also because of lingering mistrust of electric vehicles despite the expansion of the charging network and the range of vehicles on offer. The persistently high cost of electric cars, combined with a reduction in government subsidies, is discouraging potential buyers. Furthermore, when it comes to charging, the fear of running out of power and uncertainty over future electricity prices continue to act as barriers to purchase.

Hybrid cars are capitalising on this trend and, although they have not been eligible for any subsidies since 2022, they continue to gain market share, accounting for 43% of sales – a 23.5% increase year-on- compared to 2023. Non-rechargeable hybrids, up by 36.2% in 2024, dominate the market and now account for 80% of hybrids sold. Plug-in hybrid engines, following a rebound in 2023, fell by 10.2% and lost 0.7 percentage points of market share (8.5% of the total).

In terms of the vehicle fleet, as at 31 December 2024, alternative-fuel vehicles account for 10.4% of the total, of which 2.9% are electric cars. Diesel continues its steady decline (48% of the total), whilst the petrol car fleet, although growing in volume since 2015, is losing market share, albeit at an increasingly slower rate. The transformation of the vehicle fleet remains very slow, with diesel cars still accounting for nearly half of the total, compared with less than 10% of new registrations. Similarly, although electric cars account for 17% of new registrations, they still represent only 2.9% of the fleet.

43% **Share of new hybrid private cars registered in France in 2024**

► PASSENGER CARS BY ENERGY SOURCE

	2000	2015	2019	2020	2022	2023	2024	Variation 2024/2023 as a %
REGISTRATIONS								
Petrol (1)								
In units	-	741,215	1,290,560	791,559	627,785	709,528	567,561	-20.0
As a % of total registrations	51%	39%	58%	48%	41%	40%	33%	-7.0 points
Diesel								
In units	1,046,485	1,097,124	755,583	504,178	239,105	171,728	124,952	-27.2
As a % of total registrations	49%	57%	34%	31%	16%	10%	7%	-2.4 points
Electric								
In units	-	17,268	42,764	110,917	202,929	298,219	290,614	-2.6
As a % of total registrations	-	0.9%	2%	7%	13%	17%	17%	+0.1 points
Hybrid								
In units	-	61,619	125,372	243,464	459,216	595,252	735,289	+23.5
As a % of total registrations	-	3.2%	6%	15%	30%	34%	43%	+9.2 points
of which non-rechargeable								
In units	-	56,030	106,780	168,872	332,669	432,302	588,897	+36.2
As a % of total registrations	-	2.9%	5%	10%	22%	24%	34%	+9.9 points
of which plug-in								
In units	-	5,589	18,592	74,592	126,547	162,950	146,392	-10.2
As a % of total registrations	-	0.3%	0.8%	5%	8%	9.2%	8.5%	-0.7 points
Total registrations	-	1,917,226	2,214,279	1,650,118	1,529,035	1,774,727	1,718,416	-3.2
FLEET AS OF 31 DECEMBER								
Petrol (1)								
In thousands of units	18,080	13,192	15,106	15,396	15,997	16,319	16,407	+0.5
As a % of the total fleet	64%	35%	39%	40%	41%	41%	41%	-0.2 points
Diesel								
In thousands of units	9,980	23,718	22,611	22,024	20,665	19,885	19,201	-3.4
As a % of the total fleet	36%	64%	59%	57%	53%	51%	48%	-2.2 points
Electric								
In thousands of units	-	42	141	245	596	868	1,134	+30.6
As a % of the total fleet	-	0.1%	0.4%	0.6%	1.5%	2.2%	2.9%	+0.6 points
Hybrid								
In thousands of units	-	212	565	805	1,715	2,286	2,998	+31.1
As a % of the total fleet	-	0.6%	1.5%	2.1%	4.4%	5.8%	7.5%	1.7 points
of which non-rechargeable								
In thousands of units	-	176	480	647	1,290	1,709	2,287	+33.8
As a % of the total fleet	-	0.5%	1.3%	1.7%	3.3%	4.3%	5.8%	+1.4 points
of which plug-in								
In thousands of units	-	36	85	158	425	577	711	+23.3
As a % of the total fleet	-	0.1%	0.2%	0.4%	1.1%	1.5%	1.8%	+0.3 points
Total fleet	**28,060**	**37,165**	**38,424**	**38,470**	**38,973**	**39,358**	**39,739**	**+1.0**

(1) Including super ethanol and petrol/LPG.

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

In 2024, France remains in third place in the European market for the number of diesel cars sold, with 124,952 registrations, behind Germany (483,261 units) and Italy (215,294 units). Diesel engines account for just 10% of purchases by 'non-private individuals' in 2024, compared with 23% in 2022. Among private individuals, diesel is now marginal, accounting for 4% of sales. Petrol remains the leading choice among private buyers, accounting for 35% of sales, but is being caught up by non-rechargeable hybrids (34.6% of sales) and even overtaken if plug-in hybrids are included (3.6% of sales). Among 'non-private' customers, non-rechargeable hybrids now lead sales ahead of petrol (31%), with a 34% market share. Plug-in hybrids are also more popular than in the private market, accounting for 12.8% of sales.

In total, 735,289 new hybrid passenger cars were sold in 2024, placing France in third position in this market, behind Germany (947,398) and the United Kingdom (857,151), but ahead of Italy (675,457). With growth of 23% in 2024, France is one of the major European countries where hybrid vehicles have seen the greatest growth.

In terms of the vehicle fleet in France, 48% of cars on the road as at 31 December 2024 were fitted with a diesel engine. This proportion has fallen by 16 percentage points since its peak in 2015 and by 2.2 percentage points over the past year. The share of petrol cars in the fleet had been growing since 2015 but has stabilised at 41% of the total since 2020. Alternative-fuel cars, meanwhile, account for 10.4% of the total fleet. The share of electric cars stands at 2.9% (+0.6 percentage points in one year), that of non-rechargeable hybrid cars at 5.8% (+1.4 percentage points) and that of plug-in hybrid cars at 1.8% (+0.3 percentage points).

ELECTRIC PASSENGER CARS

In 2024, registrations of electric passenger cars fell for the first time since the emergence of this technology in the early 2010s. In a market down by 3.2%, the electric car market fell by 2.6% to 290,614 units. The market share of these vehicles remained flat at 16.9%, whilst France is among the countries falling short of the minimum 20% required to meet manufacturers' European CO_2 targets in 2025.

In France, the government has continued to support the development of electric mobility through the payment of the car bonus and the conversion grant, but the amounts and eligibility criteria have been scaled back. While the maximum bonus amount for those with a reference taxable income below €15,400 remains at €7,000, the amounts for other income brackets have been reduced by €1,000, falling from €5,000 to €4,000. The eligibility criteria relating to vehicle weight (under 2.4 tonnes) and purchase price (under €47,000 including VAT) remain necessary conditions for receiving the eco-bonus, but achieving a minimum environmental score has now been added to these requirements. This 'environmental score' is based on the calculation of the vehicle's carbon footprint, its production, and its transport from the manufacturing site to the distribution site in France. It aims to support only vehicles produced as close as possible to the French market, i.e. mainly in Europe. Finally, legal entities purchasing a new passenger car are no longer eligible for the €3,000 bonus granted in 2023.

However, in 2024, the government introduced a 'social leasing' scheme that enabled the purchase of around 50,000 electric cars by low-income households. This long-term leasing scheme, reserved for households with a reference income of less than €16,300, allowed them to have an electric car from €100 per month (up to €200) from a selection of models meeting certain criteria (price, eco-score). The scheme, launched in January 2024, was suspended in February due to its success and is set to be renewed in 2025. As for charging infrastructure, its roll-out across France is continuing, with 154,694 charging points open to the public by the end of 2024. The Advenir programme, aimed at apartment blocks, businesses and local authorities, has already funded more than 150,000 charging points.

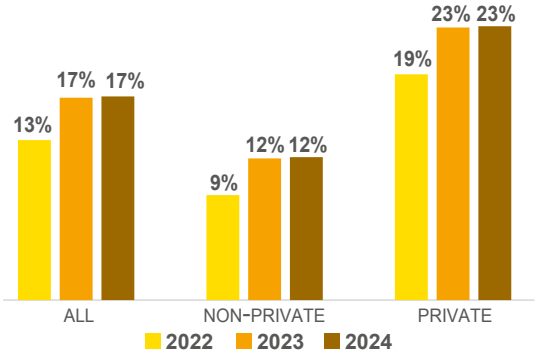
23% **Market share of electric car registrations in the private car market in 2024**

► RANKING OF THE 10 BEST-SELLING ELECTRIC CAR MODELS IN 2024

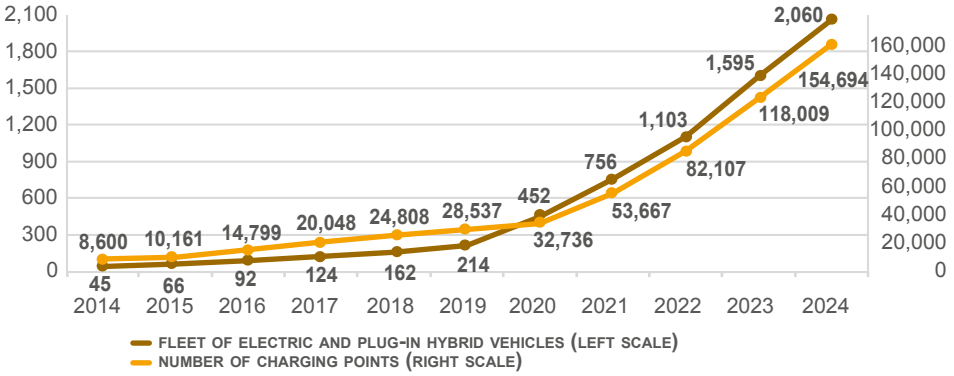
RANK	BRAND	MODEL	VOLUME	%
1	TESLA	MODEL Y	28,577	9.8%
2	PEUGEOT	208 II	23,602	8.1%
3	RENAULT	MEGANE-E	16,800	5.8%
4	FIAT	500	14,695	5.1%
5	TESLA	MODEL 3	11,617	4.0%
6	RENAULT	TWINGO III	11,299	3.9%
7	RENAULT	RENAULT 5	9,973	3.4%
8	RENAULT	SCENIC V	8,953	3.1%
9	PEUGEOT	2008 II	8,944	3.1%
10	B.M.W.	IX1	8,940	3.1%

Source: CCFA

MARKET SHARE OF FULLY ELECTRIC CARS BY BUYER CATEGORY



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



Source: AVERE

As of 31 December 2024, France had 154,694 charging points open to the public for 2,039,758 electric or plug-in hybrid vehicles, or 1 for every 13 vehicles, according to figures from AVERE. The number of charging points, spread across 48,247 stations throughout the country, increased by 31% in 2024, but this remains insufficient to meet demand. An AVERE study carried out in 2023 estimated the need for public charging points up to 2035 at between 300,000 and 400,000 points for over 12 million vehicles.

Although 90% of electric vehicle users charge at home or at work, the availability of charging points across the country remains insufficient. According to the Parc Auto survey, 33% of working people surveyed had a charging point at their workplace by the end of 2024 (compared with 12% at the end of 2021). A quarter of those surveyed also have a charging point at home or nearby. Finally, 43% of people find charging points on their usual routes, a figure up 10 percentage points on last year. As for users of 100% electric vehicles, 84% have a charging point at home and 53% at or near their workplace. On motorways, 100% of service areas on concession motorways were already equipped with fast-charging facilities by 2023. The number of charging points continues to grow in 2024.

On the supply side, the range of models on offer expands further in 2024. In the passenger car segment alone, more than 150 different models were registered in 2024, including over 40 from the Renault and Stellantis groups alone. Among the ten best-selling models in France in 2024, seven are from the Renault or Stellantis groups. The Peugeot 208 accounts for 8% of the volume of fully electric vehicles sold. Renault's Megane and the Fiat 500 are in third and fourth place, with market shares of 5.8% and 5.1% respectively. Finally, Renault's Twingo, Renault 5 and Scenic, as well as Peugeot's 2008, are also in the top ten.

On the demand side, the electric car market in 2024 remains primarily driven by demand from private individuals, who account for 62% of buyers. Demand from non-private customers therefore accounts for only 38% of total electric vehicle sales, compared with 54% of the overall market. Usage profiles (frequent drivers tending towards diesel, vehicle hire companies), the low maturity of the second-hand electric vehicle market and the lack of clarity regarding the tax framework are factors slowing down the greening of fleets. Furthermore, the bonus for companies purchasing passenger cars was abolished at the start of 2024. In 2024, the share of electric vehicles in non-private registrations stagnates at 12%, compared with 23% for private individuals. The fleet electrification targets set out in the 2019 Mobility Policy Act appear insufficient to stimulate the market. This leads, by the end of 2024, to the opening of new discussions and a legislative proposal to introduce penalties for companies that fail to meet these targets.

NEW CAR REGISTRATIONS BY MODEL, RANGE AND BODY TYPE

The economy and lower-end segments dominate in France, with a 53% market share in 2024. Within this segment, lower-end cars dominate the market (49.3% of the total), with eight models from this segment featuring among the ten best-selling models. The expansion of the all-terrain, all-road product range in this segment (2008, Captur, Duster) is boosting 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 range.

The economy range, which had reached 11.5% of sales in 2009 thanks to the success of the scrappage scheme and the bonus, hovered around 5.5% for ten years, then fell to 3.6% in 2024 as the range contracted due to regulations that drove up the price of these vehicles, making them less accessible to their usual customers. No car in this range features in the top ten best-sellers. However, this range has a slightly stronger presence in the electric market, with two models (Fiat 500, Twingo) among the ten best-selling electric models in 2024 (compared with four models last year).

The lower-mid-range segment accounts for 22.8% of the market in 2024, with three models featuring in the top 15 (308, 3008 and Austral). It is also benefiting from the development of electric and hybrid models (E-C4, Megane-E, C5 Aircross). Finally, the success of Tesla's two flagship models, even as their momentum waned during the year, keeps the luxury segment at 5.8% of registrations in 2024, which is higher than the economy segment.

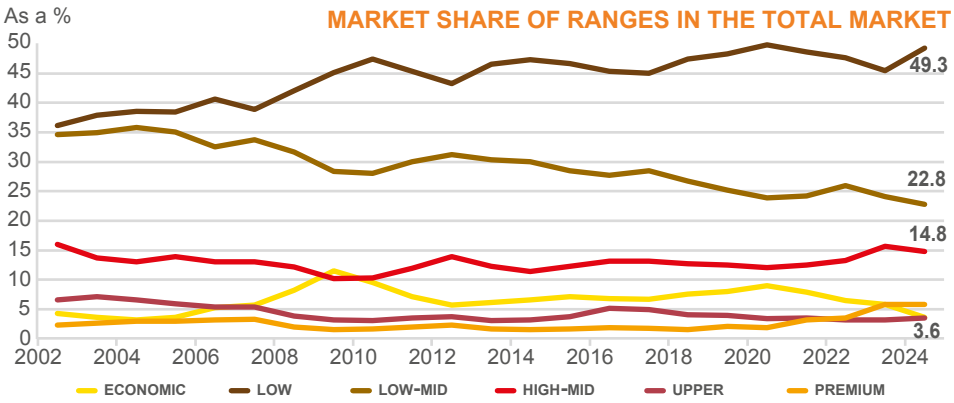
Sales by body type show that, for the second consecutive year, saloons have been overtaken by SUVs, whose market share continues to rise, standing at 49.4%, compared with 43% for saloons. The success of the SUV body style can be attributed both to consumer preferences and to the expansion of the range in the lower (Captur, 2008, Duster) and lower-mid (3008, Austral, C3 Aircross, C5 Aircross, 5008) segments. Finally, the other market segments (MPVs, estate cars and coupé-cabriolets) have been in decline for the past decade.

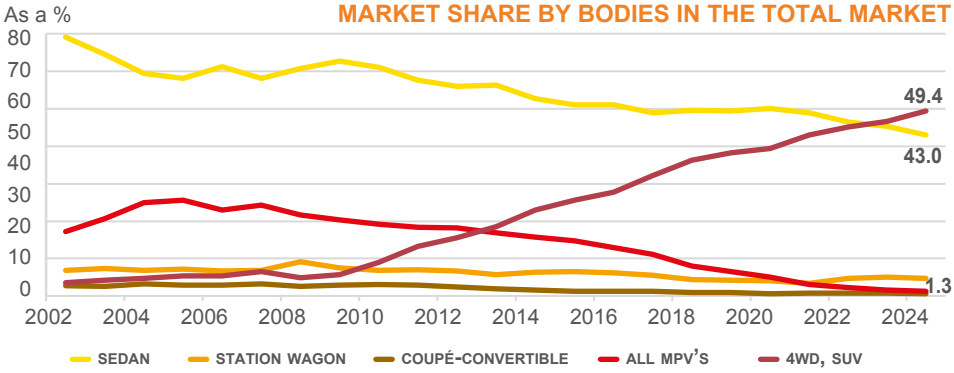
49% **Share of new passenger cars registered with an all-terrain, all-road body style**

► RANKING OF THE MAIN NEW PASSENGER CAR MODELS IN 2024

Rank	Brand	Model	% market
1	**RENAULT**	**CLIO V**	**5.3%**
2	**PEUGEOT**	**208 II**	**5.2%**
3	**DACIA**	**SANDERO 3**	**4.4%**
4	**PEUGEOT**	**2008 II**	**2.8%**
5	**RENAULT**	**CAPTUR II**	**2.7%**
6	**CITROEN**	**C3 III**	**2.3%**
7	**PEUGEOT**	**308 III**	**2.2%**
8	TOYOTA	YARIS	2.0%
9	TOYOTA	YARIS CRO	2.0%
10	TESLA	MODEL Y	1.7%
11	**RENAULT**	**AUSTRAL**	**1.5%**
12	VOLKSWAGEN	POLO VI	1.5%
13	**DACIA**	**DUSTER 3**	**1.4%**
14	**PEUGEOT**	**3008 III**	**1.3%**
15	**DACIA**	**JOGGER**	**1.3%**
16	**OPEL**	**CORSA**	**1.2%**
17	FORD	PUMA	1.1%
18	**RENAULT**	**ARKANA**	**1.1%**
19	**DACIA**	**DUSTER 2**	**1.1%**
20	**RENAULT**	**TWINGO III**	**1.0%**
21	**FIAT**	**500**	**1.0%**
22	VOLKSWAGEN	T-ROC	1.0%
23	**RENAULT**	**MEGANE-E**	**1.0%**
24	B.M.W.	X1	0.9%
25	HYUNDAI	TUCSON III	0.9%
26	**CITROEN**	**C3 AIRCR.**	**0.9%**
27	TOYOTA	C-HR II	0.9%
28	VOLKSWAGEN	GOLF VIII	0.9%
29	KIA	SPORTAGE 5	0.9%
30	**CITROEN**	**C5 AIRCR.**	**0.9%**

Source: CCFA





► NEW CAR REGISTRATIONS BY RANGE

Ranges	2000		2010		2019		2023		2024	
	units	%	units	%	units	%	units	%	units	%
Economic and low	855,161	40.1	1,283,902	57.0	1,246,492	56.3	909,373	51.2	910,390	53.0
Low-mid	695,146	32.6	627,694	27.9	557,062	25.2	428,080	24.1	391,707	22.8
Upper mid	303,028	14.2	234,664	10.4	276,406	12.5	277,977	15.7	254,801	14.8
Premium	163,293	7.7	105,313	4.7	134,319	6.1	159,293	9.0	161,518	9.4
Others	117,256	5.5	96	0.0	-	-	-	-	-	-
TOTAL	**2,133,884**	**100.0**	**2,251,669**	**100.0**	**2,214,279**	**100.0**	**1,774,723**	**100.0**	**1,718,416**	**100.0**

Source: CCFA

► NEW CAR REGISTRATIONS BY BODY TYPE

Body types	2000		2010		2019		2023		2024	
	units	%	units	%	units	%	units	%	units	%
Sedan	1,527,676	71.6	1,377,498	61.2	1,094,467	49.4	805,606	45.4	738,972	43.0
Station wagon	119,739	5.6	153,476	6.8	92,487	4.2	90,138	5.1	81,147	4.7
Coupé-convertible	50,527	2.4	70,353	3.1	21,562	1.0	12,816	0.7	10,199	0.6
All MPV'S	369,434	17.3	430,857	19.1	142,540	6.4	27,343	1.5	22,100	1.3
4WD, SUV	57,116	2.7	205,106	9.1	847,850	38.3	827,579	46.6	849,191	49.4
Others	9,392	0.4	14,379	0.6	15,373	0.7	11,241	0.6	16,807	1.0
TOTAL	**2,133,884**	**100.0**	**2,251,669**	**100.0**	**2,214,279**	**100.0**	**1,774,723**	**100.0**	**1,718,416**	**100.0**

Source: CCFA

THE RANKING BY RANGE IN 2024

Over the last twenty years, car manufacturers have expanded their range across different vehicle categories (MPV, 4WD, SUV, sedan) and powertrain technologies (plug-in and non-rechargeable hybrid, electric). Stellantis and the Renault Group now offer nearly a hundred different models, including 50 electric models. Furthermore, each body style comes in different versions depending on the car's specifications, resulting in several thousand possible combinations being brought to market. New electric models have been launched in recent years by Stellantis and the Renault Group, both in the sedan segment (A290, Renault 5, E-C3, DS4, Fiat Panda) and in the SUV, 4WD segment (Scenic, Fiat 600, E-C3 Aircross, 3008, 5008).

95 & 50 — **Respective numbers of models and electric models offered by the Renault Group and Stellantis**

Groups	Brands	Economy and low range	Lower-mid range	Upper mid range	Premium range
STELLANTIS	CITROËN	C3, E-C3, E-C3 Air Cross, Berlingo, E-Berlingo	C3 Air Cross, C4,C4 X,E-C4,E-C4 X, C5 Air Cross, Jumpy	C5 X	
	DS	DS3 Crossback	DS4	DS7	DS9
	PEUGEOT	208, 2008, Rifter, E-Rifter	308, 3008, 5008, Expert	508, 408	
	OPEL	Corsa, Combo, Combo E, Mokka, Crossland	Astra, Zafira, Grandland		
	ALFA ROMEO	Junior		Tonale	Giulia, Stelvio
	FIAT	Panda, 500, 500 X, 600, Fiorino, Doblo	Tipo, Scudo		
	MASERATI				G.Cabrio, Levante, MC20, Grecale, GranTurismo
	JEEP	Renegade, Avenger		Wrangler, Compass	Grand Cherokee
	LANCIA	Ypsilon			
RENAULT GROUP	RENAULT	Twingo, Clio, Captur, Kangoo, Zoé, Renault 5, Symbioz	Arkana, Austral, Megane, Megane E, Master	Espace, Trafic, Scénic	Rafale
	DACIA	Sandero, Duster, Spring, Jogger			
	ALPINE	A290			A110
BMW GROUP	BMW		Série 1, Série 2, M2	Série 4, X1, X2	Series 3, 5, 7, X3, X4, X5, X6, X7, XM, Z4, M3, M4, M5, IX, IX1, IX3, IX2
	MINI	Mini			
DAIMLER GROUP	MERCEDES-BENZ	Classe T	Classes A, B, CLA, Evito, EQT	GLA, EQA	Classes C, E, G, S, SL, V, CLS, EQB, EQC, EQE, EQS, EQV, GLB, GLC, GLE, GLS, GT, SLC, CLE, AMG ONE
	SMART	Fortwo	#1		#3
FORD EUROPE	FORD	Fiesta, T. Courier, T. Connect, Puma	Focus, Kuga, Transit, T. Custom	Bronco, Capri, Ranger	Mustang, Explorer, Mach-E
GEELY	VOLVO		EX30	XC40, EX40	C40, EX 90, EC40, S60, V60, XC60, XC90, EX90
SAIC MOTOR	MG	MG3	MG4, MG5, ZS, EHS, Marvel R		Cyberster
BYD	BYD		Sealion 7	Atto 3, Dolphin	Han, Seal, Seal U, Tang
HONDA	HONDA	Jazz	Civic, HR-V, E NY1, ZR-V	CR-V	
HYUNDAI KIA	HYUNDAI	Bayon, I10, I20, Kona	I30	Santa Fe, Tucson, Ioniq5, Ioniq6	
	KIA	Picanto, Stonic, EV3	Ceed, Niro, Proceed, Xceed	Sportage, EV6	Sorento, EV9
MAZDA	MAZDA	2, MX-30	3, MX-5, CX-5	CX-30	CX-60, CX-80
MITSUBISHI	MITSUBISHI	Colt	ASX, Spacestar	ECL-Cross	
NISSAN	NISSAN	Juke, Townstar	Leaf, Primastar	Qashqai, X-Trail	Ariya
SUZUKI	SUZUKI	Ignis, Swift, SX4, Vitara	Swace	Across	
TATA GROUP	JAGUAR			E-Pace	F-Pace
	LAND ROVER			RR Evoque, Defender	Discovery.Sp, Range Rover, RR-Velar
TESLA	TESLA				Model 3, Model S, Model X, Model Y
TOYOTA	LEXUS	LBX		UX250H, UX300H	ES300H, NX350H, NX450H+
	TOYOTA	Aygo X, Yaris, Yaris Cross	Corolla, Proace, Pro.City	Prius, C-HR, RAV4, Mirai, Highland, BZ4X, Hilux	Camry
VOLKSWAGEN GROUP	AUDI	A1, Q2	A3	A4, A5, TT, Q3, Q4 e-tron	A6, A7, A8, E-Tron, Q5, Q6, Q7, Q8, E-Tron GT, RS6, SQ6, SQ8 TRO
	PORSCHE				911, 718 Boxster, 718 Cayman, Macan, Cayenne, Panamera, Taycan
	SEAT/CUPRA	Ibiza, Arona	Born, Leon, Terramar	Ateca, Formentor	Tarraco, Tavascan
	SKODA		Fabia, Kamiq, Scala	Octavia, Karoq, Enyaq	Superb, Kodiaq
	VOLKSWAGEN	Up, Polo, Caddy, T-Cross, T-Roc	Golf,Touran, Taigo, ID3	Passat, Arteon, Tiguan, Transport, ID.4, ID.Buzz, Multivan	Touareg, ID.5, ID.7
XPENG	XPENG				G6, G9

Sources: CCFA

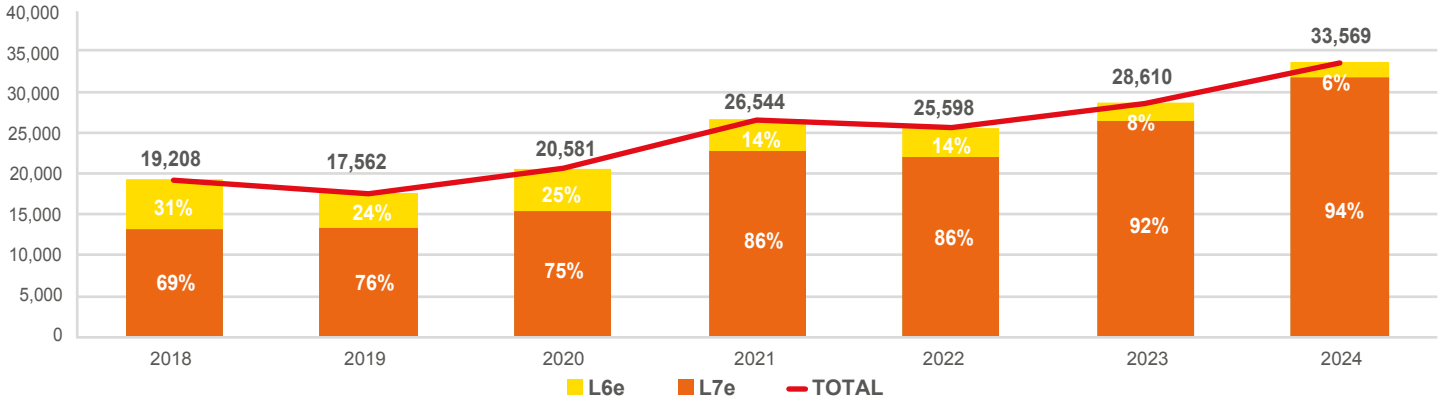
LIGHT AND HEAVY MOTOR QUADRICYCLES

In 2024, the market for light and heavy motor quadricycles will see 33,569 registrations, representing a 17% increase compared to 2023. This market has been experiencing strong growth since 2018, with a 75% rise in registrations, particularly in 2020 (+63%). The growing demand for small urban vehicles that are compact and easy to park, as well as improvements in their safety and comfort features, explain this trend. The increase in supply and the development of electric powertrains have also contributed to their success, and French manufacturers are active in this market (Stellantis with the Citroën Ami and the Fiat Topolino, and Renault with the Twizy and the Duo). Furthermore, at European level, this segment is the subject of discussions aimed at developing a concept for a lightweight, affordable vehicle that is more environmentally friendly.

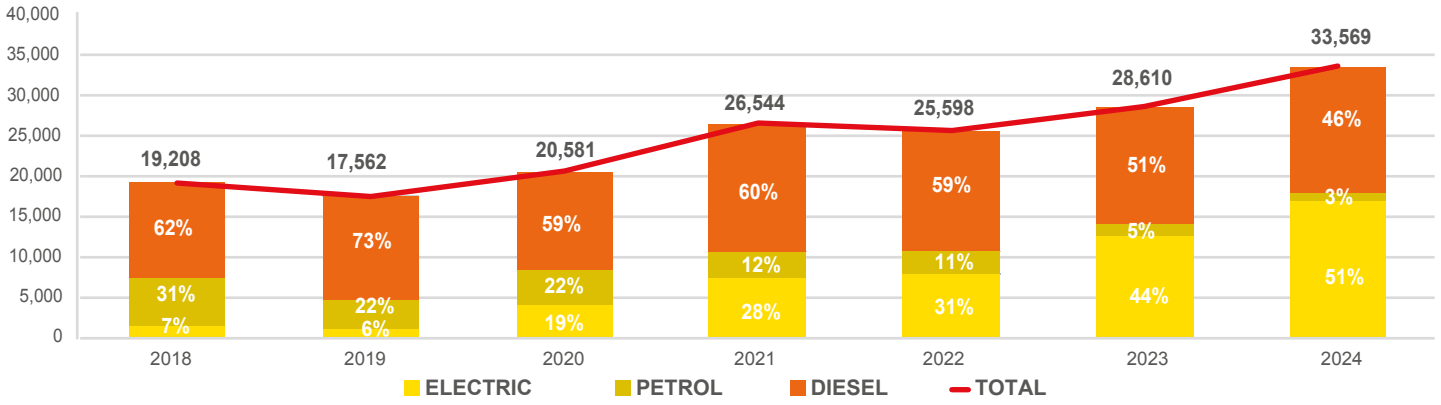
Light motor quadricycles, also known as 'licence-free cars', account for 94% of all quadricycles. These are the most attractive category as they do not require a full driving licence to be driven. They have seen strong growth since 2018 (+139%), whilst registrations of heavy motor quadricycles have plummeted (-69%).

The development of electric powertrains in this segment is another factor contributing to the appeal of these vehicles. In 2018, light motor quadricycles running on diesel dominated the market, accounting for 89% of registrations, compared with just 5% for electric models. By 2024, electric vehicles will occupy a central position, with 16,086 registrations, representing a 51% market share. Between 2018 and 2024, the number of registered electric vehicles has thus increased twenty-two-fold.

►THE QUADRICYCLE MARKET BY CATEGORY



►THE QUADRICYCLE MARKET BY ENERGY TYPE



The market for motor quadricycles has grown in recent years in parallel with the increase in the range of vehicles available and the diversification of mobility needs. A motor quadricycle is a four-wheeled vehicle with an enclosed cabin which, depending on its technical characteristics, falls into one of two distinct categories. The L6e category refers to light quadricycles designed to carry a maximum of two people, including the driver, with an unladen weight not exceeding 425 kg, a maximum speed of 45 km/h and a maximum engine capacity of 50 cm³ for a spark-ignition internal combustion engine. They can be driven from the age of 14 with the Road Safety Certificate, which corresponds to the AM category of the driving licence, but may not be driven on motorways or expressways.

The second category is category L7e, which refers to heavy motor quadricycles. These vehicles, designed for passenger transport (L7e A), have an engine capacity exceeding 50 cm³, a maximum power output of 15 kW and an unladen weight not exceeding 450 kg. They can be driven from the age of 16 after obtaining a B1 licence, and their maximum speed can reach 90 km/h.

The best-selling category is the first category, commonly known as the 'licence-free car' or 'microcar', which accounts for 94% of registrations. Previously, the main customers for this type of vehicle were elderly people living in isolated rural areas or in suburban areas poorly served by public transport. Another category of buyers was people who had failed to obtain their driving licence or had lost it. But today, these vehicles are attracting a new clientele looking for a small, less expensive vehicle that is practical for dense urban areas. New models have emerged, bringing about a real change in image that makes these vehicles more appealing to young people. Their small size and electrification enable them to address the challenges of mobility in the most densely populated areas (parking, air pollution, traffic jams). Finally, businesses also appear to be interested in these vehicles, having purchased 20% of new microcars in 2024.

USED PASSENGER CARS

In 2024, the used car market grew by 3.1% to 5.35 million units, against a backdrop of falling new car registrations (-3.1%). The ratio of used cars sold to new cars had risen to over 3 between 2020 and 2022, due to a shortage of vehicles and rising prices in the new car market. It fell back to 2.9 in 2023, thanks to the recovery of the new car market and the reduced appeal of the used car market, which offered fewer recent vehicles at higher prices. In 2024, the used car market is once again benefiting from a sluggish new car market and a fall in prices (-0.9%), whilst prices in the new car market have continued to rise (+1.5%).

The average age of used cars that changed hands in 2024 is stabilising. Transactions involving cars less than one year old, which had fallen by 12% in 2023, rose by 10% in 2024 and their share increased by 0.3 percentage points (5.4% of transactions, compared with 10% in 2019). Used cars aged fifteen years and over continue to account for a growing share of transactions, albeit at a slower pace. They represent 28% of the total, compared with 19% in 2019. As the share of 10- to 14-year-old cars falls slightly, the share of cars aged ten years and over drops by one percentage point to 47% of the total, compared with 41% in 2019.

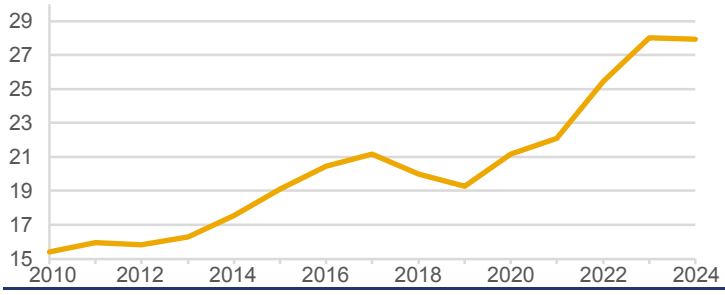
Diesel cars, which now account for just 7% of new registrations, continue to dominate the used car market, but their share has fallen below the 50% mark, dropping by 4 percentage points in 2024 to 46.8% of the market (2.1 million units). Their decline is benefiting electric and hybrid vehicles, whose volumes in the used car market are increasing by more than 50%. Used petrol cars saw a slight increase in 2024 (+3%), stabilising their market share at 40.1%. In the used car market, the share of electric vehicles is still low (2.5% compared with 17% in the new car market). However, unlike in the new car market, it has grown in 2024. Registrations of used hybrid cars are also rising sharply in 2024 and now account for 9.4% of transactions.

28% **Share of used cars aged 15 years and over registered in 2024**

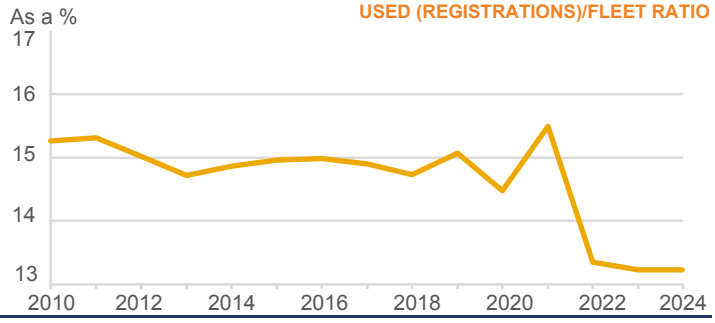
► USED CARS	Units	2000	2010	2019	2020	2021	2022	2023	2024
REGISTRATIONS									
New cars	thousands	2,134	2,252	2,214	1,650	1,659	1,529	1,774	1,718
Used cars	thousands	5,082	5,386	5,791	5,569	6,016	5,205	5,196	5,354
Used/new ratio		2.4	2.4	2.6	3.4	3.6	3.4	2.9	3.1
Cars less than five years old	% used	40	37	37	37	36	32	31	31
- Cars less than a year old	% used	12	8	10	9	8	6	5	5
- Cars less than a year old	% new	29	19	27	31	27	20	15	17
Cars over five years old	% used	60	63	63	63	64	68	69	69
Cars from five to 9 years old	% used	-	26	21	20	20	20	21	22
Cars from 10 to 14 years old	% used	-	21	22	22	22	22	20	19
Cars 15 years old and over	% used	-	15	19	21	22	25	28	28
Used diesel powered cars	thousands	-	3,558	3,518	3,200	3,339	2,711	2,645	2,506
	% used	-	66.1	61	57	56	52	51	47
Used electric or hybrid cars	thousands		6	104	146	285	331	409	638
	% used		0.1	1.8	2.6	4.7	6.4	7.9	11.9
CAR FLEET (AS OF 12/31)	**thousands**	**28,825**	**35,280**	**38,424**	**38,470**	**38,819**	**38,973**	**39,358**	**39,739**
USED (REGISTRATIONS) / FLEET RATIO	**%**	**17.6%**	**15.3%**	**15.1%**	**14.5%**	**15.5%**	**13.4%**	**13.2%**	**13.2%**

Sources: CCFA, MTE/SDES

PROPORTION OF VEHICLES AGED 15 YEARS OR MORE / TOTAL USED PASSENGER CARS



USED (REGISTRATIONS)/FLEET RATIO



The passenger car is a durable good that households buy, use, maintain and eventually resell on the used car market. According to the Parc Auto survey (page 49), households are keeping their cars for longer and longer. The average ownership period has risen from 3.8 years in 1991 to 6.4 years today (5.6 in 2020).

Sales of used cars take place through a car dealer or directly between private individuals. Dealers generally handle transactions for 'younger' used cars, i.e. those under five years old. According to the Parc Auto survey, private sales channels appear to have declined during the pandemic, in favour of dealers' used car networks, which are undoubtedly more reassuring from a health perspective. By 2024, the share of used car transactions carried out through a professional now stands at 72%, of which 47% are with a car brand dealership. Purchases from private individuals have increased by one percentage point in a year.

Between 5 and 6 million used cars are thus traded each year; this market is subject to fewer fluctuations than the new car market. Demand for used vehicles generally follows the trend of the vehicle fleet more closely; it is less influenced by economic factors than demand for new cars and is therefore less affected in the event of major crises. It may nevertheless be affected by measures designed to stimulate the new car market. On average, 15% of the vehicle fleet changed hands each year, but this ratio fell to 13% in 2023.

Since 1990, the ageing of the vehicle fleet and the rise in multi-car households have led to an increase in the proportion of cars over five years old in used car transactions. Then, over the following three years, incentives to renew the fleet (scrappage schemes) boosted the proportion of used cars under five years old. Since the health crisis and the semiconductor crisis, the weakness of the new car market has automatically led to an increase in the proportion of older used cars, particularly those aged 15 years and over, which has risen from 19% in 2019 to 28% in 2024.

Used cars less than a year old can be considered part of the new car market. This is because they are often cars first registered by a car dealer (demo cars or hire cars), which are 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. Subsequently, volumes increased every year until 2020. Since then, the decline in sales to automotive professionals, supply difficulties, the semiconductor shortage and rising prices have once again caused a fall in the number of new vehicles destined to become recent used cars.

In 2024, according to the Parc Auto survey, used cars still account for a high proportion of the vehicle fleet (60%, compared with 51% in 1991). Of all car purchases made in 2024, their share stands at 63%, compared with 67% in 2021. Consequently, the share of cars purchased new in 2024 stands at 37%, compared with 33% in 2021.

VEHICLE REGISTRATIONS IN THE OVERSEAS DEPARTMENTS (DOM)

Sales of new vehicles in the five overseas departments fell by 9.5% in 2024, following a modest increase in 2023 (+0.8%). This decline affected all vehicle categories except buses and coaches. It was more pronounced in the passenger car segment (-9.4%) and the light commercial vehicle segment (-11.3%) than in the industrial vehicle segment excluding coaches and buses (-4.9%). Only the coach and bus segment saw an increase (+57%).

All departments were affected by the decline in registrations in 2024. Réunion, which represents the largest market with 40% of vehicle registrations in the French overseas departments, saw its market contract for the third consecutive year, with a 12% drop in passenger car registrations (following a 2.7% decline in 2023). Guadeloupe and Martinique, which are the second and third largest markets in the region, accounting for 24% and 22% of registrations respectively, are down by 7.1% and 10.6%.

As in mainland France, registrations of diesel cars continued to fall in 2024 and now account for just 9.1% of the total, compared with 7.3% in mainland France. Electric cars, as in mainland France, declined in 2024. The market contracted by 17.2%, resulting in an average market share for electric vehicles of 8.2% across all overseas departments. However, this market share reaches 13.2% in Réunion, but only 2.1% in Mayotte. For plug-in hybrid vehicles, the market share does not exceed 3.6%, compared with 8.5% in mainland France. In contrast, the non-plug-in hybrid segment is enjoying the same success as in mainland France. It grew by 28.5% in 2024 in a market that contracted by 9% and now accounts for 30% of registrations, compared with 34% in mainland France.

Registrations of commercial vehicles over 5 tonnes (excluding coaches and buses), which had risen by 20% across the region in 2023, fell by 4.9% in 2024 in almost all departments. Guadeloupe and French Guiana are the exceptions, with increases of 1.9% and 8.2% respectively. Finally, registrations of coaches and buses rose sharply in 2024 (+57%), following the significant decline recorded in 2023 (-24%). French Guiana and Réunion stand out with triple-digit growth in the coach and bus market in 2024.

The Renault Group and Stellantis maintain high market shares in the overseas departments. For passenger cars, the market share stands at 51% on average in 2024, down 2 percentage points compared to 2023. For light commercial vehicles, the market share stands at 71%, up six percentage points compared to 2023. In the niche market for industrial vehicles, Renault Trucks' market share stands at 26.7%, a sharp decline (-10 percentage points) compared to 2023.

Registrations of used passenger cars fell for the fourth consecutive year. With 121,455 units, the decline is 2.2% compared with 2023, but with the new car market even more depressed (-9.4%), the ratio is improving. It stands at 2.2 used cars for every new car, compared with 3.1 in mainland France in 2024.

8% **Share of electric cars registered in the French overseas departments in 2024**

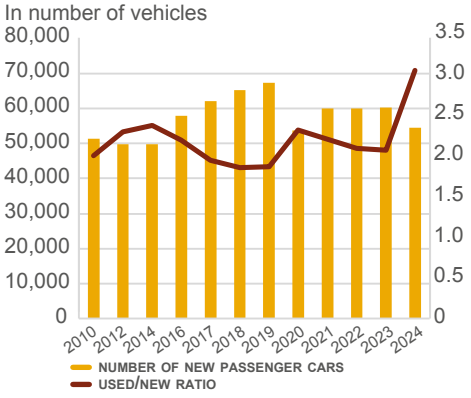
NEW PASSENGER CARS	2000	2010	2019	2020	2021	2022	2023	2024	Variation 2024/2023	Variation 2024/2019
GUADELOUPE	13,691	13,438	16,741	12,230	12,731	14,162	14,434	13,459	-6.8%	-19.6%
GUYANA	4,031	4,382	5,450	4,410	5,497	5,418	5,464	5,114	-6.4%	-6.2%
MARTINIQUE	14,424	13,147	15,853	11,374	12,965	13,364	13,933	12,597	-9.6%	-20.5%
MAYOTTE (1)	-	-	1,729	1,657	2,095	1,958	2,007	1,913	-4.7%	+10.6%
REUNION ISLAND	21,463	20,295	27,556	23,990	26,667	25,110	24,443	21,514	-12.0%	-21.9%
TOTAL DOM	**53,609**	**51,262**	**67,329**	**53,661**	**59,955**	**60,012**	**60,281**	**54,597**	**-9.4%**	**-18.9%**
TOTAL DOM USED PASSENGER CARS	**ND**	**104,381**	**127,746**	**126,436**	**134,184**	**127,702**	**124,455**	**121,680**	**-2.2%**	**-4.7%**
USED/NEW RATIO	**-**	**2.0**	**1.9**	**2.4**	**2.2**	**2.1**	**2.1**	**2.2**	**-**	**-**

LIGHT COMMERCIAL VEHICLES (UP TO 5 T)	2000	2010	2019	2020	2021	2022	2023	2024	Variation 2024/2023	Variation 2024/2019
GUADELOUPE	2,685	2,394	2,465	2,136	2,763	2,838	2,666	2,414	-9.5%	-2.1%
GUYANA	1,143	1,239	1,311	1,208	1,578	1,519	1,513	1,499	-0.9%	+14.3%
MARTINIQUE	2,368	2,016	2,059	1,849	2,744	2,584	2,452	2,030	-17.2%	-1.4%
MAYOTTE (1)	-	-	401	331	472	431	566	416	-26.5%	+3.7%
REUNION ISLAND	5,200	4,166	5,863	4,875	6,101	4,965	5,423	4,837	-10.8%	-17.5%
TOTAL DOM	**11,396**	**9,815**	**12,099**	**10,399**	**13,658**	**12,337**	**12,620**	**11,196**	**-11.3%**	**-7.5%**

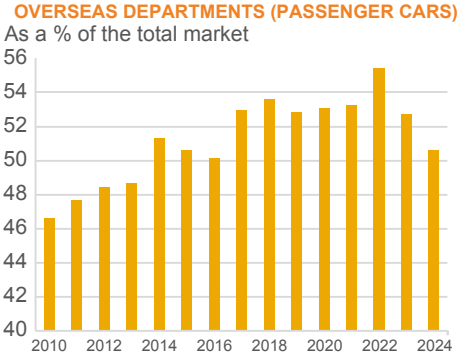
INDUSTRIAL VEHICLES INCLUDING COACHES AND BUSES (OVER 5 T)	2000	2010	2019	2020	2021	2022	2023	2024	Variation 2024/2023	Variation 2024/2019
GUADELOUPE	146	135	183	153	186	120	125	129	+3.2%	-29.5%
GUYANA	66	85	88	106	113	111	136	148	+8.8%	+68.2%
MARTINIQUE	187	84	170	149	182	167	162	168	+3.7%	-1.2%
MAYOTTE (1)	-	-	81	84	134	121	120	63	-47.5%	-22.2%
REUNION ISLAND	362	293	376	390	401	352	372	497	33.6%	32.2%
TOTAL DOM	**761**	**597**	**898**	**882**	**1,016**	**871**	**915**	**1,005**	**+9.8%**	**+11.9%**

(1) From 1 April 2011. Source: CCFA

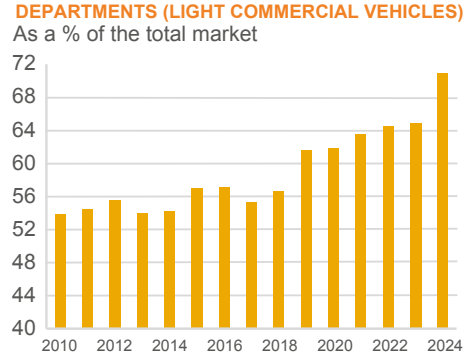
PASSENGER CARS: REGISTRATIONS AND USED/NEW RATIO



MARKET SHARE OF THE RENAULT AND STELLANTIS GROUPS (1) IN THE OVERSEAS DEPARTMENTS (PASSENGER CARS)



MARKET SHARE OF THE RENAULT AND STELLANTIS GROUPS (1) IN THE OVERSEAS DEPARTMENTS (LIGHT COMMERCIAL VEHICLES)



(1) Excluding FCA before 2021.

LIGHT COMMERCIAL VEHICLES IN FRANCE

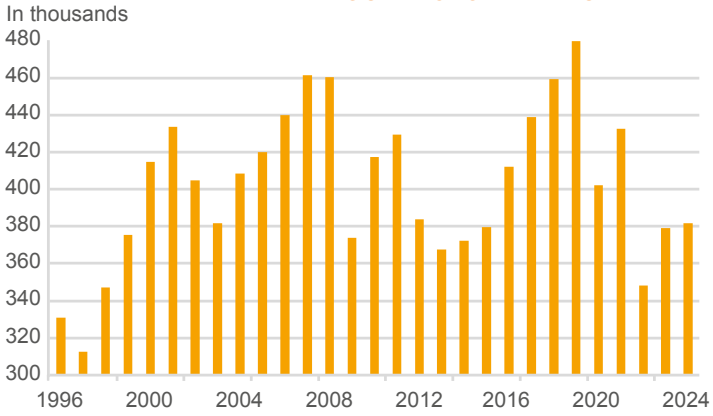
In 2024, the market for new light commercial vehicles increased very slightly, by 0.7%, to stand at 381,855 units. This figure remains well below its long-term average of around 400,000 units and is down 20% compared to 2019. The market for used light commercial vehicles, meanwhile, grew by 1.2% to reach 851,870 units, a level 4% higher than in 2019. The ratio of used registrations to new registrations remains stable at 2.2, slightly above the level observed during the 2009 crisis (2.1).

French groups and brands have always held a dominant position in the French light commercial vehicle market. In 2024, sales by the Renault Group, Stellantis and other French brands accounted for 69.2% of light commercial vehicle sales.

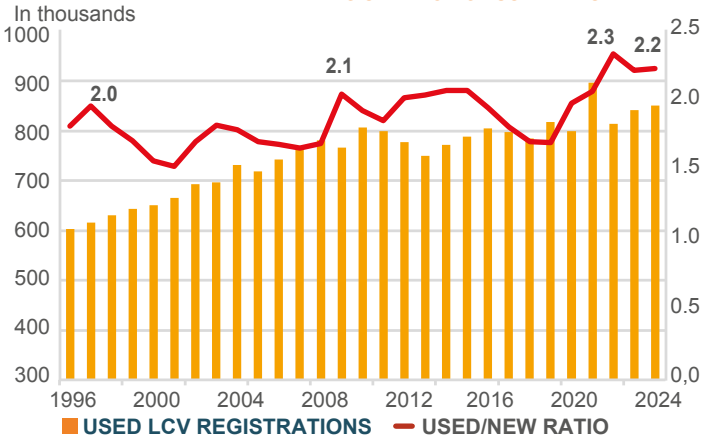
These groups are also leading manufacturers and produce vehicles at their sites for their partners (Renault for Renault Trucks, Nissan and Mercedes; Stellantis for Toyota). In France, production of light commercial vehicles stands at 447,458 units in 2024, representing 33% of the country's total vehicle production. Produced entirely by the Renault Group and Stellantis, this accounts for 2% of global light commercial vehicle production and more than a quarter of European production.

33% of light vehicles produced in France are commercial vehicles

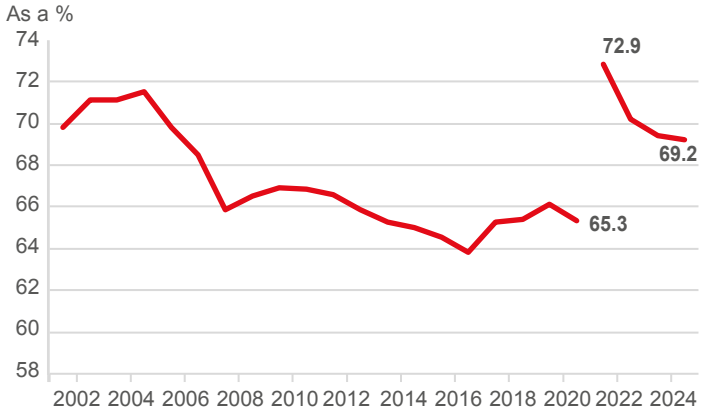
REGISTRATION OF NEW LCVS IN FRANCE



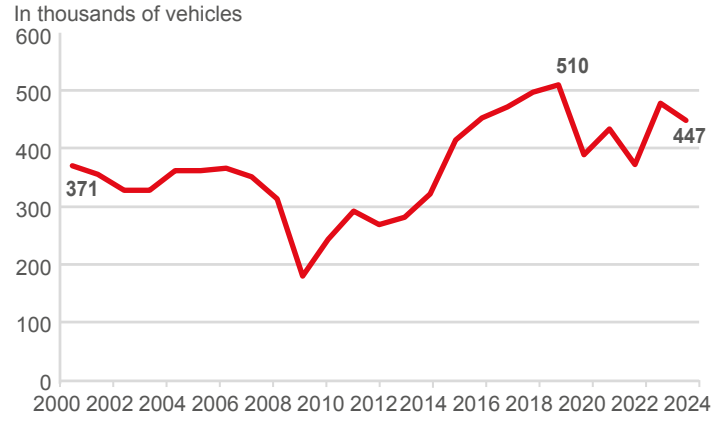
REGISTRATION OF USED LCVS IN FRANCE



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



PRODUCTION OF LIGHT COMMERCIAL VEHICLES BY FRENCH MANUFACTURERS IN FRANCE



Source: CCFA

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

These vehicles are used intensively: they cover more kilometres each year (an average of 2,000 more) than passenger cars (see the traffic overview on page 53). Whilst private individuals cover fewer kilometres with their light commercial vehicles, certain sectors are very heavy users: transport, courier services, warehousing, as well as specialised activities and the 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 at 31 December 2023, is 50% owned by individuals (private individuals and tradespeople), 14% by legal entities operating in the construction sector and 8% in the retail sector. Their average age ranges between 10 and 11 years and is slightly lower than that of passenger cars (10.9 compared to 11.2 as of 31 December 2023). Its replacement rate (new registrations / fleet) stands at 5.8%; as for its turnover rate (used registrations / fleet), it stands at 13.1%, a level comparable to that observed for passenger cars.

Light commercial vehicles are higher value-added vehicles, which can be produced more easily in France. Over the last twenty years, the production of light commercial vehicles by French manufacturers in France has increased, in line with growth in the French and European markets, reaching 510,000 units in 2019. However, the health crisis, followed by the semiconductor crisis, caused production to fall below the 400,000-unit mark. In 2024, production fell by 6.5% to 447,500 units.

CHARACTERISTICS OF LIGHT COMMERCIAL VEHICLES IN FRANCE

The light commercial vehicle market has transformed since the early 2000s, driven by changing demand for greater load-carrying capacity and a move towards mass production to reduce the environmental footprint. Consequently, vehicles under 2.5 tonnes, which accounted for two-thirds of the market in 2001, now account for just one-third. Light commercial vehicles weighing over 2.5 tonnes have been in the majority since 2016 and will account for 62% of the market by 2024.

This shift from light commercial vehicles to heavier vehicles has also been accompanied by growing demand for vans. The van segment, which accounted for just 24% of sales in 2000, is now the largest segment, accounting for 45.8% of sales in 2024 – an increase of two percentage points in one year. The minivan segment is the second-largest, accounting for 24.5% of sales, ahead of passenger car derivatives. The latter were the largest segment in 2000, accounting for a third of sales. Today, they account for just 12.1% of the market. Finally, sales of pick-ups, which had seen strong growth between 2015 and 2018, have been declining since 2019. They account for just 1.5% of sales in 2024.

In terms of powertrains, alternatives to internal combustion engines are developing more slowly than in the passenger car market, making it even more difficult to meet the European Commission's CO_2 targets. Diesel still dominates the market with 77.5% of sales and has even regained 0.5 percentage points of market share in 2024. Petrol engines, which rank second and had seen strong growth in 2023, decline by 2% in 2024 and stabilise at a market share of 11.2% of sales.

The electric segment, which also saw strong growth in 2023, declined by 11% in 2024 and lost one percentage point of market share to 7%. The penetration rate for electric vehicles rose to 13% in the passenger car derivatives market and to 11% in the van market. By contrast, it stands at just 5% in the van segment. As for hybrids, the penetration rate is also rising, but accounts for only 3% of sales. It is higher in the passenger car derivatives market (18%).

In the light commercial vehicle market for vehicles under 5 tonnes, Stellantis and the Renault Group account for 69.2% of registrations in 2024. Of the top ten best-selling models in France in 2024, nine belong to the Renault Group or to Stellantis. In 2024, seven are vans and the remaining three are light vans.

7% **Market share of electric commercial vehicles in 2024**

► REGISTRATIONS OF NEW LIGHT COMMERCIAL VEHICLES BY BODY STYLE

BODIES	2000		2010		2020		2023		2024	
	units	%	units	%	units	%	units	%	units	%
Cars derivatives	133,679	32.2	116,582	27.9	54,913	13.6	53,382	14.1	46,279	12.1
Small vans	110,727	26.7	113,152	27.1	97,487	24.2	90,972	24.0	93,626	24.5
Vans	99,953	24.1	136,647	32.7	184,212	45.8	165,981	43.8	174,958	45.8
Mini-buses/coaches	867	0.2	525	0.1	259	0.1	429	0.1	598	0.2
Pickup	6,327	1.5	12,126	2.9	9,468	2.4	11,462	3.0	5,672	1.5
4WD, SUV	4,470	1.1	9,302	2.2	8,559	2.1	10,722	2.8	9,732	2.5
Others	58,943	14.2	29,278	7.0	47,484	11.8	46,263	12.2	50,990	13.4
TOTAL	**414,966**	**100.0**	**417,612**	**100.0**	**402,382**	**100.0**	**379,211**	**100.0**	**381,855**	**100.0**

► RANKING OF THE MAIN MODELS OF NEW LIGHT COMMERCIAL VEHICLES IN 2024

Rank	Brand	Model	Market share
1	RENAULT	MASTER	8.3%
2	RENAULT	TRAFIC	7.4%
3	RENAULT	KANGOO	6.0%
4	PEUGEOT	PARTNER	5.9%
5	PEUGEOT	EXPERT	4.7%
6	CITROEN	BERLINGO	4.2%
7	FIAT	DUCATO	4.0%
8	IVECO	DAILY	3.6%
9	CITROEN	JUMPY	3.4%
10	FORD	T.CUSTOM	3.2%
11	RENAULT	CLIO	3.0%
12	FORD	TRANSIT	2.8%
13	PEUGEOT	BOXER	2.8%
14	PEUGEOT	208	2.7%
15	MERCEDES	SPRINTER	2.7%
16	CITROEN	JUMPER	2.5%
17	RENAULT	EXPRESS	2.3%
18	CITROEN	C3	2.0%
19	MERCEDES	VITO	1.9%
20	RENAULT	MASTER RT	1.8%

► REGISTRATION OF NEW LIGHT COMMERCIAL VEHICLES BY WEIGHT

	2001	2020	2024
< 1,5T	5.5%	0.9%	0.7%
1,5T TO < 2,5T	58.9%	38.8%	37.9%
2,5T TO 3,5T	35.5%	60.0%	60.9%
> 3,5T TO 5T	0.2%	0.3%	0.6%
TOTAL	**100.0%**	**100.0%**	**100.0%**

Source: CCFA

► REGISTRATION OF NEW LIGHT COMMERCIAL VEHICLES BY ENERGY

	2022	2023	2024	
	%	%	units	%
DIESEL	85.3%	77.1%	295,967	77.51%
PETROL	6.8%	11.2%	41,581	10.89%
ELECTRIC	4.8%	8.0%	26,860	7.03%
OTHERS	3.0%	3.7%	17,447	4.57%
TOTAL	**100.0%**	**100.0%**	**381,855**	**100.0%**

CHARACTERISTICS OF THE HEAVY TRUCK MARKET IN FRANCE

The French market for new heavy trucks of 5.1 tonnes and over is stable in 2024 (+0.2%) and stands at 48,982 units. The market grew until June (+5% over six months), then turned downwards in July, given the high volumes recorded in July 2023 prior to the new tachograph. The second half of 2024 remained sluggish, ending the year with zero growth.

The rigid truck segment, which had been hardest hit by delivery issues in 2021 and 2022, continues, as in 2023, to make up for lost ground with the registration of vehicles whose delivery had been delayed due to bodywork lead times. This segment grew by 15% in 2024 to 23,472 units. The tractor segment, which had begun its recovery as early as 2021, is experiencing a downturn after three years of growth. It falls by 10.3% in 2024 to 25,510 units. In 2024, tractors account for 52% of vehicle sales, compared with 58% the previous year.

The breakdown of heavy truck sales by tonnage has changed over the past twenty years. The share of vehicles over 16 tonnes has increased, rising from 80% of sales in 2001 to 90% in 2022, reflecting efforts to consolidate transport to reduce its environmental footprint. In 2023, however, vehicles over 16 tonnes grew at a slower rate than the market as a whole and declined in 2024. They now account for 84% of the total. Vehicles under 16 tonnes, meanwhile, continued to increase (+19%, following +54% in 2023) and reached a record level of 7,940 vehicles.

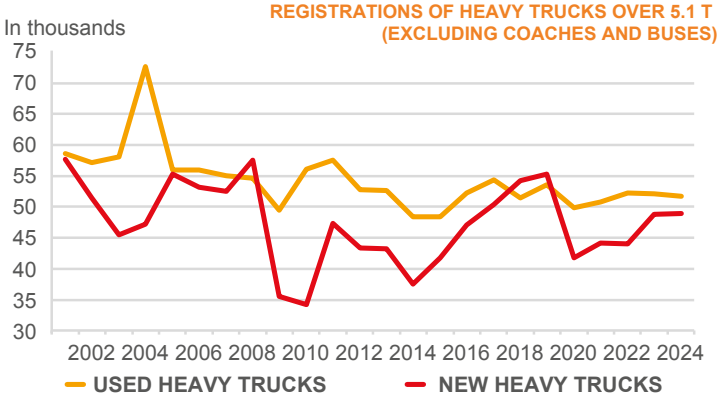
Diesel engines continue to dominate sales, but their market share has fallen below the symbolic 90% mark. Diesel registrations fell by 2.5% in 2024 in favour of alternative powertrains (B100 biodiesel, electric). Sales of electric vehicles continued to grow in 2024, reaching 670 units, which still represents only 1.4% of the market – a level far removed from the trajectory compatible with CO_2 targets. Registrations of NGV (natural gas vehicle) vehicles fell in 2024 and now account for only 3.2% of the market. Vehicles running on B100 (biodiesel) continued to gain market share and accounted for 5.6% of sales in 2024.

In 2024, the used market is just as sluggish as the new market. It falls by 0.7% to 51,745 units. The ratio of used vehicles to new vehicles stabilises at its average level, around 1.1, compared with 1.5 during the 2009 crisis and 1.2 between 2020 and 2022.

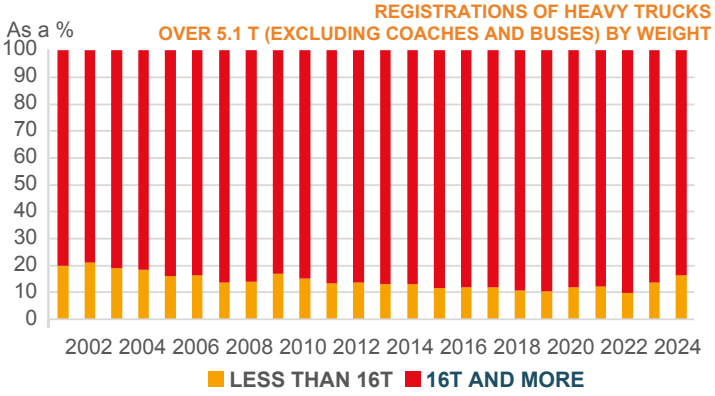
The Renault Trucks brand retains its leading position in France in 2024 and increases its market share to 29.8%. It gains almost 2 percentage points compared to 2023, thanks to sales growth in both the rigid truck market and the tractor unit market, despite the latter being in overall decline.

30% **Renault Trucks' share of the market for heavy trucks over 5 tonnes in France in 2024**

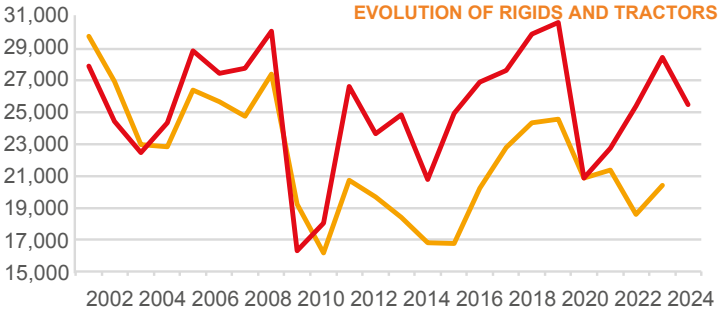
REGISTRATIONS OF HEAVY TRUCKS OVER 5.1 T (EXCLUDING COACHES AND BUSES)



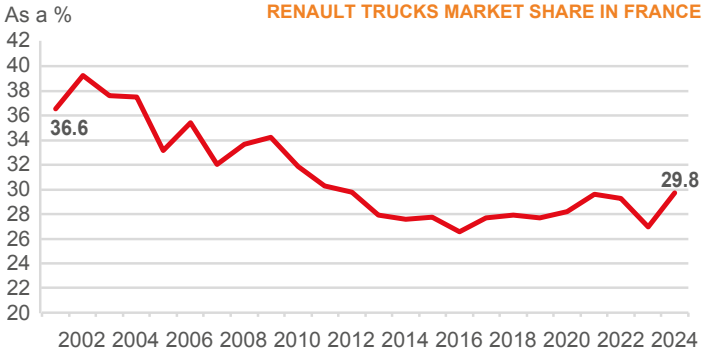
REGISTRATIONS OF HEAVY TRUCKS OVER 5.1 T (EXCLUDING COACHES AND BUSES) BY WEIGHT



REGISTRATIONS OF HEAVY TRUCKS 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 of 5.1 tonnes or more, intended for the transport of goods. A distinction is made between rigid trucks and tractor units. They can be delivered with a body fitted or as bare chassis, which are subsequently fitted out by specialist 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 various categories depending on its use: tipper, box body, flatbed, refrigerated, and tanker. The tractor unit is designed to 'pull' its trailer and is more commonly used for long-distance transport. Tractors used for long journeys are equipped with numerous features to enhance driver comfort: sleeping berths, storage compartments, touchscreens, audio/radio systems and even a fridge.

The tractor unit market, which accounts for over 50% of the commercial vehicle market, is more volatile than that for rigid lorries. As they are used more intensively (113,000 km per year, compared to 75,000 km for a rigid lorry according to the CNR), tractor units are replaced more frequently. Consequently, the tractor fleet is half the age of the lorry fleet, with an average age of 5.5 years and 11 years respectively. However, sales of road tractors are also more heavily affected by the vagaries of the economic climate and road freight transport. In 2009, 2014 and 2020, the tractor market declined by 10 percentage points more than that of rigid trucks. In 2024, it is once again subject to the vagaries of the economic climate after having been buoyed in previous years by the post-Covid recovery. The rigid truck market, on the other hand, is benefiting from a need for renewal and a catch-up effect caused by shortages and bodywork lead times that had held back registrations until 2023.

Diesel engines continue to dominate the market with a share of over 90%, but the range of electric vehicles is expanding and the CO_2 emission reduction targets set by the European Union are also helping to boost sales. In 2024, the market share of electric vehicles stands at 1.4%, compared with 0.3% in 2022. The various financial support schemes (depreciation allowances, calls for projects) remain essential to the market's emergence.

At the end of 2023, Renault Trucks opened the assembly line for the Renault Trucks E-Tech T and C, 44-tonne electric trucks, at the Bourg-en-Bresse plant (Ain). The brand now offers a complete range of 100% electric vehicles, ranging from 650 kg to 44 tonnes, to meet the diverse needs of the urban logistics sector (refrigerated transport, waste collection, distribution) and is pursuing the goal of having 50% of its volumes powered by battery-electric vehicles by 2030. Its market share in electric vehicles stands at 76% in 2024.

HOUSEHOLD CAR OWNERSHIP

In 2024, the household car ownership rate (excluding large commercial vehicles) stands at 84.7%, up 0.4 percentage points compared with 2023. Since 1990, this rate has risen sharply, regardless of the type of municipality, reaching a plateau in 2020 (85%).

Multi-car ownership has also risen steadily since 1980 (16% of households owned multiple cars) and has slowed since 2020. In 2024, multi-vehicle households account for 35.1% of all households, down 0.9 percentage points from the previous year. The proportion of households with three cars has also fallen to 4.6% of all households, after rising steadily until 2023 (see page 95).

The type of municipality in which households are located remains a key factor in car ownership rates. In rural municipalities, the car ownership rate is rising and now stands at over 95% in 2024. Conversely, in the Paris region—a densely populated area with a well-developed public transport network—the car ownership rate declined until 2023, with only two-thirds of households owning a car; however, in 2024, the car ownership rate rebounded, rising by 2 percentage points to 68.3%. In other major French conurbations with over 100,000 inhabitants, the car ownership rate remains relatively stable at around 82.5%.

In line with the levels observed in suburban or rural areas, car ownership is also higher among manual workers (92%) than in higher socio-professional categories (around 88%), who tend to live in urban areas. The economically inactive, including pensioners, are also less likely to own a car than the average (around 79%), but the car ownership rate among those aged 65 and over has risen over the last twenty years.

The proportion of people under the age of 25 holding a driving licence remained relatively stable until 2018, before falling thereafter. In 2024, 61% of 18-21-year-olds hold a driving licence, compared with 75% of 22-24-year-olds. For people aged over 75, the rate is rising and stands at 91% in 2024 (compared with 66% in 1996).

85% **Household car ownership rate**

► CAR OWNERSHIP RATE (PROPORTION OF HOUSEHOLDS WITH AT LEAST ONE CAR) (AS A PERCENTAGE)

	1990	2000	2010	2020	2023	2024
ACCORDING TO SOCIO-PROFESSIONAL CATEGORY						
Farmers	95.9%	91.1%	92.1%	95.0%	96.7%	84,7% (1)
Agricultural workers	74.7%	-	-	-	-	-
Traders, craftsmen, business leaders	95.2%	90.6%	91.1%	84.2%	81.4%	88.1%
Liberal professions, senior executives	94.4%	84.6%	84.1%	85.8%	84.1%	87.6%
Intermediate professions, foremen	93.3%	90.8%	89.8%	91.3%	91.6%	91.2%
Employees	78.3%	77.5%	82.5%	81.8%	82.6%	84.0%
Workers	87.2%	88.7%	91.2%	91.3%	93.0%	91.7%
Inactive	54.6%	70.9%	77.1%	81.5%	79.5%	79.1%
including retirees	59.4%	76.0%	80.1%	83.6%	84.0%	81.9%
ACCORDING TO THE CATEGORY OF MUNICIPALITY						
Rural municipalities	82.1%	91.1%	92.7%	94.0%	94.8%	95.1%
Towns with fewer than 20,000 inhabitants	76.6%	86.1%	90.2%	91.7%	89.9%	90.5%
Towns with 20,000 to 100,000 inhabitants	77.3%	84.2%	87.1%	89.1%	87.3%	85.5%
Towns with more than 100,000 inhabitants	74.2%	76.6%	80.8%	83.8%	82.2%	82.6%
Paris metropolitan area	77.0%	60.4%	63.6%	65.6%	66.2%	68.3%
City of Paris	47.3%					
ACCORDING TO THE HABITAT CATEGORY						
City-center	-	69.4%	73.0%	74.5%	73.9%	73.1%
Suburb	-	80.5%	83.2%	84.7%	83.2%	84.0%
Peri-urban	-	89.8%	91.6%	93.3%	92.4%	93.4%
Rural	-	90.4%	94.8%	92.4%	96.7%	96.2%
ACCORDING TO THE AGE OF THE HEAD OF HOUSEHOLD						
Under 25	-	49.3%	64.9%	84,5% (1)	55,4% (1)	60.9%
25 to 34	-	82.4%	83.9%	87.4%	85.3%	87.0%
35 to 44	-	86.3%	88.0%	87.5%	84.3%	87.5%
45 to 54	-	87.4%	88.1%	86.7%	85.6%	87.9%
55 to 64	-	87.0%	86.9%	87.0%	87.9%	86.3%
65 to 74 years	-	69.0%	76.2%	85.2%	85.6%	84.5%
Over 75 years	-				78.9%	77.1%
CARS WHOSE MAIN USER IS A WOMAN	**-**	**40.4%**	**41.5%**	**43.8%**	**41.3%**	**42.6%**
ALL	**76.5%**	**80.3%**	**83.5%**	**85.2%**	**84.3%**	**84.7%**

(1) This figure is not statistically significant as the sample size is too small.
Sources: INSEE until 1993, KANTAR TNS PARC AUTO from 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 rising since 2015 (+2 percentage points), and stands at 84.7% in 2024, a slight increase following a decline the previous year.

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 for households with an annual taxable income of between €7,500 and €11,000 is 67% in 2024, up 6 percentage points compared with 2023. The rate for the wealthiest households (€38,000 and above) is 94%.

• Car ownership rates in cities with more than 100,000 inhabitants stand at 82.6% in 2024, compared with 75% in 1995. After rising in the post-COVID period in the largest conurbations (Paris, Lille, Lyon), it fell significantly in 2023, particularly in the Lille and Lyon conurbations. It falls by five percentage points in the Lille conurbation, to 87%, and by four points in the Lyon conurbation to 76%. In the Paris conurbation, it falls by two points to 66%. In 2024, it rises slightly in Lyon and Paris (+2 points).

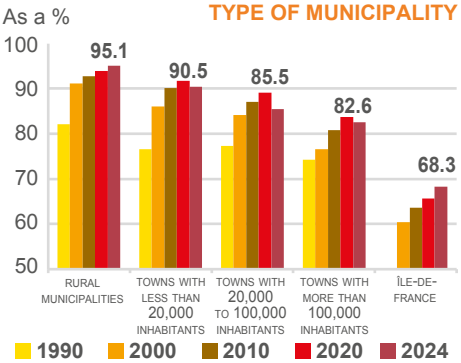
• Rural households, large families, as well as manual workers and farmers are highly motorised groups (90%). Furthermore, their rates of multiple car ownership are also above average.

• The categories of white-collar workers and the economically inactive (including pensioners) are relatively less well-equipped, but since 2000 their car ownership rates have been rising steadily.

In 2010, among households without a vehicle, the proportion of households that had 'given up car ownership' stood at 45%, compared with 55% of households that had never owned a car. In 2024, the proportion of households that have never owned a vehicle stands at around 45%, having reached 50% last year.

Not having a driving licence is the main reason for not owning a car and has risen sharply in recent years (cited by 53.1% of people in 2024, compared with 47% in 2023 and 40% in 2022). This is followed by not needing one (43%). In third place, the high cost of purchase (32% of non-motorised households) has now overtaken the cost of running a car (30.4% of households) as the reason for not owning a car in 2024. A preference for cycling, walking or public transport is now a reason cited by more than a quarter of respondents. Among non-motorised households, 14.5% are considering getting a car again over the next two years.

CAR OWNERSHIP RATES BY TYPE OF MUNICIPALITY



THE HOUSEHOLD CAR FLEET

After declining steadily from the 2000s onwards, daily or near-daily car use stabilised above 70% until 2019. Having fallen by three percentage points during the COVID year, it has remained at around 68% since then, with the rise of remote working. In 2024, the proportion of vehicles in the fleet used daily or almost daily stands at 67.6%, compared with 68.8% in 2023. The main reasons for using a car are shopping (89% of vehicles) and leisure (77%). Half of all vehicles (50.3%) are used for commuting. Finally, 21% of vehicles are used to take children to nursery or school.

The weakness of the new car market since 2020 is contributing to an increase in the average age of the fleet owned by households, which will rise further in 2024 (10.1 years, compared with 8.9 years in 2019). The length of time vehicles are kept is also increasing, to 6.4 years in 2024, compared with 5.5 years in 2019.

The mileage on the odometers of vehicles owned or made available to households reflects the ageing of the fleet, the proportion of new registrations within the fleet, and the intensity of vehicle use. In 2024, the odometer reading of a petrol vehicle will increase by 2,500 km to 74,900 km, and that of a diesel vehicle will rise by 8,700 km (149,170 km) due to the low rate of renewal of the diesel fleet. Across all fuel types, the average odometer reading stands at 103,980 km in 2024, compared with 93,140 km in 2000. In 2024, the average annual mileage remains stable (10,810 km, compared with 13,670 km in 2000). In recent years, reduced vehicle usage has had a greater impact than the ageing of the fleet or the low number of new registrations.

Finally, the share of diesel vehicles in the fleet continues to decline alongside falling registrations, standing at 41.4% in 2024, compared with over 60% in 2015. The share of petrol vehicles in the fleet rises to 50.2%, compared with 49.2% in 2023. The share of alternative-fuel vehicles (electric, hybrid, LPG) is increasing within the fleet and accounts for around 9%.

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

► FLEET OWNED OR MADE AVAILABLE TO HOUSEHOLDS

	units	1990	2000	2010	2020	2023	2024
Total fleet	millions	23.0	27.4	33.6	36.2	36.0	36.2
Average age	year	5.8	7.3	8.0	9.0	9.8	10.1
Average holding period	year	3.7	4.4	5.0	5.6	6.3	6.4
FLEET DISTRIBUTION BY AUTOMOTIVE GROUP							
Renault Group	%	33.3	33.3	28.6	27.1	26.2	28.4
PSA Group / Stellantis (1)	%	38.3	35.2	38.2	38.5	39.9	38.0
Foreign brands	%	28.4	31.4	33.2	34.4	36.7	37.1
FLEET DISTRIBUTION BY TAX POWER							
2 & 3 CV	%	3.4	0.7	44.4	50.9	52.2	53.1
4 & 5 CV	%	38.4	40.5				
6 & 7 CV	%	47.1	50.0	42.5	36.6	35.7	33.3
8 CV & more	%	12.8	8.8	13.1	12.5	12.2	13.6
FLEET DISTRIBUTION BY RANGE							
Small cars	%	39.4	45.1	46.8	48.5	47.8	48.2
Low-mid	%	20.8	27.3	30.9	23.6	21.4	19.9
High-mid	%	26.0	19.9	11.5	5.1	4.1	4.0
Premium	%	8.7	7.0	5.0	2.1	1.9	1.7
Others	%	5.1	0.8	5.7	20.7	24.8	26.2
Share of cars purchased new	%	50.4	43.9	41.1	41.5	40.7	39.8
FLEET DISTRIBUTION BY FUEL USED							
Petrol	%	77.4	61.0	38.3	46.0	49.2	50.2
Diesel	%	17.2	38.1	59.9	52.0	43.8	41.4
Others (hybrids, electric vehicles, LPG vehicles, etc.)	%	5.4	0.9	1.8	2.0	7.0	8.4
Kilometres on clock	km	69,500	93,140	103,470	99,670	101,210	103,980
Share of vehicles used every day or almost every day	%	75.1	78.7	71.8	67.3	68.8	67.6
Share of vehicles used for the home-work journey	%	55.4	55.1	53.7	52.3	50.5	50.3

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 became part of the PSA Group. From 2021, the FCA brands (Fiat, Alfa Romeo and Lancia) became part of Stellantis.
Sources: INSEE until 1993, KANTAR TNS PARC AUTO from 1994

The PARC AUTO survey, conducted annually by KANTAR, indicates that the vehicle fleet owned or made available to households consists of passenger cars, but also light commercial vehicles (around 4% of the total).

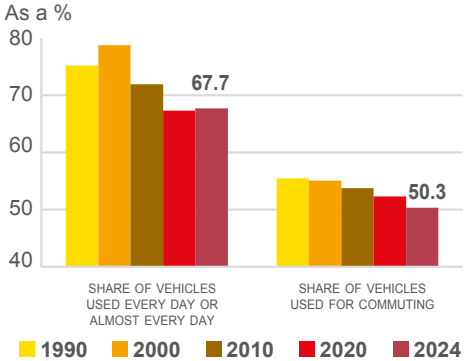
The average age of the petrol fleet, which had been rising steadily since 2020 and had fallen in 2023, is set to rise again in 2024 (9.5 years), due to low levels of new registrations. The average age of the diesel fleet, meanwhile, continues the upward trend that began in 2009, reaching 11.9 years in 2024, compared with 6.8 years in 2008. The proportion of vehicles over 5 years old continues to rise in 2024, accounting for 74% of the fleet. This growth is evident both for vehicles over 10 years old (38% of the fleet) and for those between 5 and 10 years old (35% of the fleet).

The most common tax power ratings are between 2 and 5 CV, and their share will increase by 2024 to account for 53% of the fleet. Lower-end and lower-mid-range cars account for 48% and 20% of the fleet respectively. The share of cars in the 'miscellaneous' category, consisting mainly of 4x4s and off-road vehicles, continues to grow strongly and stands at 26.2% of the fleet in 2024, compared with 10.6% in 2015.

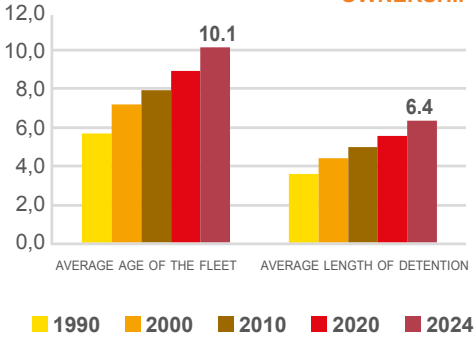
The fitment of automatic gearboxes and emergency systems (E-Call) in the fleet continues to increase. By 2024, 25% of cars will be fitted with an automatic gearbox and 15% with an E-Call system. Speed limiters/cruise control are now fitted to 71% of cars in the fleet, and emergency braking assistance to 44%. Finally, electronic stability control (ESC) is present in 36% of cars in the fleet.

As regards vehicle usage, patterns vary. In the Paris metropolitan area, regular driving accounts for only 58% (compared with 74% overall) and is tending to fall. In contrast, in other areas, including major urban centres, regular driving is more common and is on the rise.

USE OF VEHICLES



AVERAGE AGE OF THE HOUSEHOLD VEHICLE FLEET AND LENGTH OF OWNERSHIP



DOMESTIC PASSENGER TRANSPORT

In 2024, domestic passenger transport, across all modes, will increase by 0.9% to 1,047 billion passenger-kilometres, a level that has been rising since 2020 but remains 2.9% below 2019 levels.

Measured in passenger-kilometres and limited to domestic transport, road transport remains the dominant mode for passenger travel. Since 2020, when the share of private cars peaked at 87%, it has been declining and stands at 81.8% in 2024. However, compared to pre-Covid levels, it has fallen by just one percentage point (82.8% in 2019). The modal share of rail transport, meanwhile, stands at 11.8% in 2024, compared with 10.1% in 2019, having hit an exceptional low in 2020 (7.5%). The share of buses, coaches and trams has also increased since the low point of 2020, without returning to the 2019 level (5.2% in 2024, compared with 5.6% in 2019), whilst the share of domestic air travel has fallen slightly (1.2% in 2024, compared with 1.5% in 2019).

In 2024, private car travel, measured in passenger-kilometres, is stabilising following the decline observed last year. It stands at a level approximately 4.1% below its pre-crisis level.

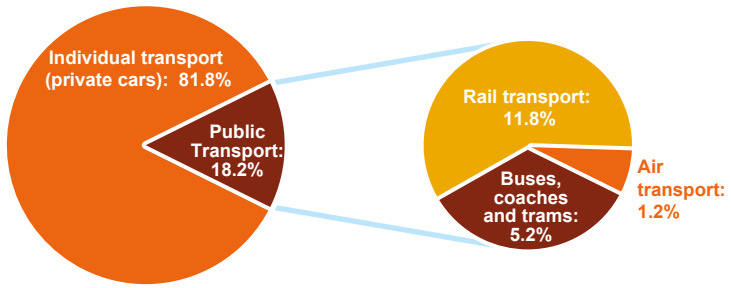
Public road transport, which includes coaches, buses and trams, will grow by 2.3% in 2024, but will remain below its 2019 level (-10%). Coach transport is up slightly in 2024 (+1.1%). It remains below its pre-crisis level (-12%), but the sub-segment of freely organised regular intercity transport (so-called 'Macron' coaches) continues to grow strongly (+11.8% compared to 2019).

Rail transport, which includes journeys by train (TGV, TER, RER) as well as by metro, continues to grow strongly in 2024 (+5.9%) and is now 13% above its pre-crisis level. This growth is driven by that of the TGV and the expansion of the SNCF's low-cost services, but also by traffic on other lines (intercity and TER trains), notably boosted by the Paris Olympic and Paralympic Games in the summer of 2024. Two new night train routes were also launched in 2024, bringing the total number to five.

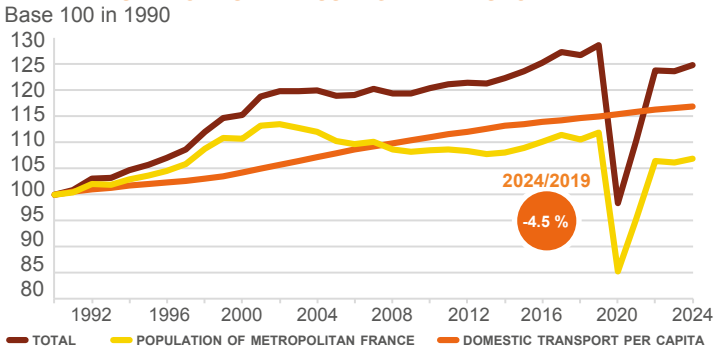
Finally, air transport, which had lost half its passenger volume and reached a historic low in passenger numbers in 2020, declined for the second consecutive year (-4.6% in 2024), following two years of strong growth in 2021 and 2022. The number of passenger-kilometres for air transport therefore remains significantly lower (-22%) compared to 2019.

+0.9% **Increase in domestic passenger transport in 2024**

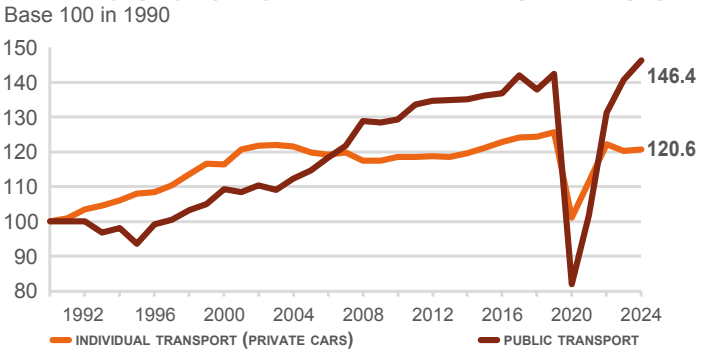
DISTRIBUTION OF DOMESTIC PASSENGER TRANSPORT BY MODE IN 2024



TRENDS IN DOMESTIC PASSENGER TRANSPORT PER CAPITA



EVOLUTION OF COLLECTIVE AND INDIVIDUAL TRANSPORT



Sources: MTE/SDES, INSEE

Passenger mobility is, of course, linked to the economy, as is freight transport, but it also incorporates a social dimension, namely human interaction, which remains essential.

Whilst freight transport is more closely linked to the productive sector - wether industrial, craft-based or agricultural - passenger mobility covers a significantly broader economic sphere. Commuting forms a major part of this, but the development of the economy, including the service sector, also depends on passenger mobility (health services, leisure, tourism, etc.).

The factors determining the choice of transport mode include origin and destination, distance, journey times and individual constraints (volumes carried, timetables, etc.). The development of new personal transport services also broadens the choice of transport modes.

Passenger transport requires, for each mode, significant investment – generally recouped over a long period – to build and maintain infrastructure.

When mobility is expressed in passenger-kilometres, light vehicles appear to dominate domestic passenger transport. Expressing this in terms of the number of daily journeys, particularly in dense urban areas where public transport and other modes (bicycles, motorcycles, etc.) play an important role, or in passenger-kilometres for long-distance international travel, highlights the scope of relevance of each mode and their complementarity.

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

The 2020 crisis marked a historic turning point, with a 24% decline in per capita travel volumes. Since then, per capita mobility has risen again but is set to stabilise in 2023 and 2024 at a level that remains 4.5% below pre-crisis levels.

DOMESTIC FREIGHT TRANSPORT

Domestic freight transport (including oil pipelines) increased by 3.5% in 2024 to 354.5 billion tonne-kilometres. Road transport remains the primary mode of transport used, accounting for 86% of tonne-kilometres transported. It meets many of the criteria involved in mode choice and is suited to most freight flows. Indeed, the Ministry of Transport's Road Freight Transport (TRM) survey shows that 70% of tonnes loaded under the French flag are delivered within 150 kilometres, making modal shift difficult. Conversely, only 5% of tonnes transported are carried over 500 kilometres.

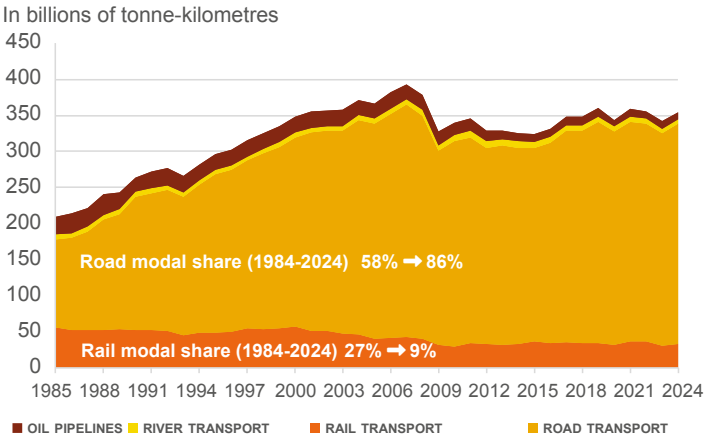
Over the last fifteen years, road freight transport has gone through various phases. In 2009, it was severely impacted by the economic crisis and hit a low of 284 billion tonne-kilometres. After a rebound in 2010–2011, the decline continued (-1.5% per year) until 2015, marked by a decline in French-flagged activity in favour of foreign-flagged activity.

Then, from 2016 onwards, the economic recovery led to a return to growth (4% per year), which was interrupted by the Covid crisis. Since then, activity picked up in 2021 but declined in 2022 and 2023. In 2024, road freight transport is growing again (+3.4%) and, with 305.4 billion tonne-kilometres transported, has returned to its 2019 level.

Rail freight transport, which had regained market share in 2021 (around 10%), declined in the following two years. In 2024, it grew by 7.4% and accounted for 32.6 billion tonne-kilometres, representing 9.2% of freight transport. This strong performance is largely due to the absence of industrial action in 2024, unlike in previous years. However, the tonnages transported are increasing at a slower rate, resulting in a rise in the average distance travelled. As for inland waterway transport, despite unfavourable conditions in the agricultural and construction sectors, it will grow by 2.1% in 2024, following two years of sharp decline.

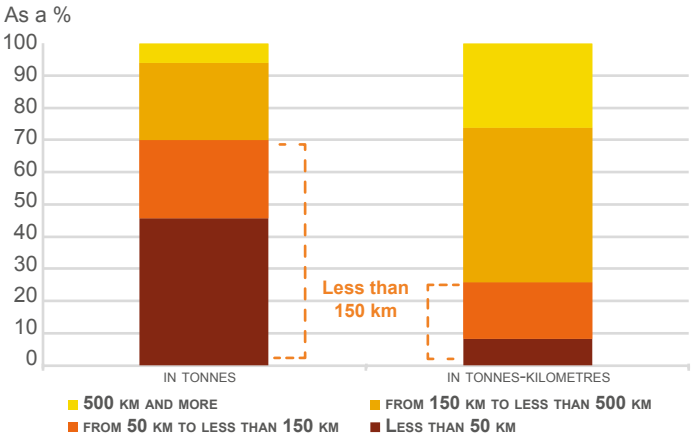
86% **Share of road transport in land freight transport measured in tonne-kilometres in 2024**

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 2024



Source: MTES/SDES, Enquête TRM

Demand for freight transport is closely linked to the country's economy and its interactions with others; it corresponds, on the one hand, to domestic demand from various economic actors and, on the other, to exports by companies producing within the country. Furthermore, certain countries such as Germany or France are, by virtue of their geographical location, areas where the transit of goods plays a predominant role. In road freight transport, this manifests itself in the phenomenon of cabotage, but also, for several years now, in the arrival of foreign operators, who are taking an increasing share of the market from French-flagged operators.

The physical movement of goods and commodities exported by a country is a key aspect of the economy's competitiveness. To remain competitive and facilitate export activity, the social security and tax burden on road transport—whether under general law or specific legislation (such as fuel tax)—must be comparable to that in other European countries.

The destination and the type of goods or commodities being traded are often decisive factors in the choice of transport mode. Liquids can be transported via pipelines, thereby avoiding transhipment; ports are, amongst other things, used for trade with distant countries.

Domestic demand from various economic agents covers a wide variety of goods and commodities. This demand is met through domestic (self-) production or through imports. Transport enables the physical connection of production sites with one another, then with consumption sites, and finally with reprocessing and recycling sites: in France, the interaction with spatial planning is even more significant.

Due to the wide variety of goods and merchandise, numerous factors come into play and can influence the choice of transport mode. This is the case for:
- the weight of the goods: car manufacturers mainly transport their steel coils by rail or river;
- the value of the goods and merchandise being transported;
- delivery time: perishable goods, such as fresh produce, must be transported quickly and are therefore mainly transported by road;
- the point of departure and arrival of the goods, both during the production phase (linked to spatial planning) and during the consumption phase. The latter is mainly located in urban areas, due to where households are based.

Furthermore, the various modes of transport require infrastructure, which entails significant investment, generally recouped over a long period, and which must be used wisely. Intensive use, namely the consolidation of flows, is therefore all the more relevant. The same applies if, within a transport chain, several modes are used, particularly due to transhipment between these different modes.

Road freight transport, through its ability to serve the entire road network, its flexibility, its adaptability and its quality of service, meets these numerous criteria, which demonstrate that transport is not a homogeneous whole, but a multitude of sub-markets, which are often not interchangeable. Furthermore, modal shift is not feasible for a large proportion of freight flows, particularly over the last few kilometres, or because it would increase transport distances too much. Effective intermodality relies on economically acceptable costs and efficient changes of transport mode. The energy transition in road freight transport must fit within this framework.

Without taking into account the geographical location of departure and arrival points, there are two main units for measuring freight transport: tonnes measured at the time of loading and tonne-kilometres. Road transport remains dominant in freight transport, with a modal share of 86% of tonne-kilometres travelled.

ROAD TRAFFIC

In 2024, road traffic remained stable at 608 billion vehicle-kilometres. Following sustained growth between 1990 and 2002 (an average of +2.3% per year), growth slowed significantly between 2002 and 2019 (+0.7% per year), before plummeting in 2020 (-18%) due to travel restrictions linked to the health crisis. Then, a recovery took place in 2021 and 2022 (+19% over two years), before stalling in 2023 (-1.6%). Remaining stable in 2024, traffic volumes remain 4% below their 2019 level.

Light vehicles accounted for 568 billion vehicle-kilometres, representing 93% of total traffic. Among light vehicles, French-registered passenger cars accounted for 72% of vehicle-kilometres, whilst French-registered light commercial vehicles accounted for 14%. Foreign light vehicles and motorised two-wheelers make up the remainder. Traffic from light commercial vehicles is down slightly compared to 2023 (-0.9%), whilst it remains stable for other vehicle categories. Heavy goods vehicle traffic is relatively stable in 2024 and shows a decline of just 2% compared to 2019.

By the end of 2024, 39% of the passenger car fleet had a Crit'Air 1 or E sticker. For heavy goods vehicles, 66% of the fleet had a Crit'Air 2, 1 or E sticker. Their positive impact on traffic is even more significant given that they are driven more frequently than older vehicles.

+0.2% **Stable road traffic in 2024**

► ROAD TRAFFIC

	1990	2000	2012	2019	2020	2023	2024	Average annual variation as a %		
								2012/1990	2024/2012	2024/2023
FLEET (ANNUAL AVERAGES IN THOUSANDS OF VEHICLES)	**28,016**	**33,528**	**40,824**	**43,999**	**43,899**	**45,012**	**45,520**	**+1.7**	**+1.0**	**+1.1**
Cars	23,327	28,067	34,725	37,224	37,177	38,023	38,466	+1.8	+0.9	+1.2
Petrol	19,753	18,209	12,787	14,159	14,540	15,350	15,526	-2.0	+1.8	+1.1
Diesel	3,574	9,859	21,681	22,302	21,666	19,790	19,108	+8.5	-1.1	-3.4
Non-rechargeable hybrid	-	-	21	416	533	1,433	1,906	-	+50.6	+33.0
Plug-in hybrid	-	-	28	74	108	488	629	-	+32.6	+29.0
Electric & other energies (excluding LPG)	-	-	11	123	184	701	981	-	+50.3	+40.0
Light commercial vehicles (LCV)	4,089	4,830	5,435	6,091	6,039	6,287	6,351	+1.3	+1.4	+1.0
Petrol	2,111	1,168	286	215	209	252	287	-8.7	+0.0	+14.0
Diesel	1,978	3,662	5,121	5,816	5,762	5,902	5,895	+4.4	+1.3	-0.1
Hybrid and gas	-	-	21	20	22	47	56	-	+9.5	+20.9
Electric & other energies (excluding LPG)	-	-	7	39	45	86	112	-	+28.6	+30.3
Heavy goods vehicles (>5t)	536	554	583	597	596	612	612	+0.4	+0.4	+0.05
Buses & coaches under French flag	64	76	81	88	88	90	91	+1.1	+1.0	+0.2
AVERAGE ANNUAL MILEAGE (IN THOUSANDS OF KM)										
Cars	13.63	13.93	12.80	12.53	10.17	11.73	11.62	-0.3	-0.9	-0.9
Petrol	11.97	10.75	8.24	9.20	7.57	9.92	10.06	-1.7	+1.8	+1.4
Diesel	22.39	19.72	15.54	14.74	12.02	13.37	13.18	-1.6	-1.5	-1.5
Non-rechargeable hybrid	-	-	16.72	16.15	12.44	15.71	15.70	-	-0.6	-0.1
Plug-in hybrid	-	-	16.91	16.56	12.94	17.68	17.89	-	+0.5	+1.2
Electric & other energies (excluding LPG)	-	-	7.32	11.32	9.40	13.10	13.51	-	+5.7	+3.1
Light commercial vehicles (LCV)	14.85	16.16	14.60	14.24	12.79	13.37	13.12	-0.1	-1.0	-1.9
Petrol	9.87	9.00	5.18	6.61	6.59	9.25	9.86	-2.9	+6.0	+6.6
Diesel	20.11	18.42	15.18	14.60	13.08	13.64	13.37	-1.3	-1.1	-2.0
Hybrid and gas	-	-	9.25	10.71	10.49	14.95	15.30		+4.7	+2.3
Electric & other energies (excluding LPG)	-	-	5.79	7.70	7.05	8.57	8.95		+4.0	+4.4
Heavy goods vehicles (>5t)	42.43	48.10	45.06	44.52	41.43	42.77	42.49	+0.3	-0.5	-0.7
Buses and coaches	31.64	30.64	33.60	33.52	25.11	32.45	33.07	+0.3	-0.1	+1.9
UNIT CONSUMPTION (litres per 100 km)										
Petrol cars	8.68	8.12	7.61	6.90	6.83	6.74	6.72	-0.6	-1.1	-0.3
Diesel cars	6.73	6.74	6.35	5.96	5.94	5.93	5.93	-0.3	-0.6	-0.1
Petrol LCVs	9.39	9.22	7.91	7.60	7.52	7.49	7.47	-0.8	-0.5	-0.3
Diesel LCVs	9.77	9.35	7.93	7.80	7.77	7.75	7.74	-0.9	-0.2	-0.1
Heavy goods vehicles	36.23	36.62	34.97	33.32	32.98	32.10	31.87	-0.2	-0.8	-0.7
Buses and coaches	32.00	32.99	32.78	30.72	30.41	29.70	29.49	+0.1	-1.0	-0.7
FUEL CONSUMPTION (ALL ROAD TRANSPORT) (IN MILLIONS OF LITRES)										
Petrol	23,863	18,217	9,633	10,858	9,001	12,581	13,100	-4.0	+2.8	+4.1
Diesel	19,515	32,731	41,046	40,219	33,669	35,005	33,924	+3.4	-1.7	-3.1
Total	43,378	50,948	50,679	51,077	42,670	47,586	47,024	+0.7	-0.7	-1.2
TOTAL TRAFFIC (1) (2) (IN BILLIONS OF VEHICLE-KM)	**425**	**528**	**595**	**632**	**520**	**607**	**608**	**+1.5**	**+0.2**	**+0.2**
Light vehicles (1) (2)	397	492	557	592	483	567	568	+1.6	+0.2	+0.2
Including French flag cars	310	383	436	459	372	439	440	+1.6	+0.1	+0.2
Including French flag light commercial vehicles	65	78	79	87	77	84	83	+0.9	+0.4	-0.9
French flag heavy goods vehicles	22.5	26.3	25.5	26.0	24.1	25.6	25.5	+0.6	-0.0	-0.3

(1) Including vehicles registered abroad. (2) Including motorised two-wheelers. Source: MTE/SDES/CCTN

Road traffic is estimated by cross-referencing data 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 assessment has been based on the SDES's new register of road vehicles (RSVERO), which combines information from registration certificates and roadworthiness tests. Long-term time series have been reconstructed and estimates are updated annually.

In 2024, the fleet of vehicles registered in France is estimated at 45.5 million units, up 1.1% compared with 2023. The number of diesel cars in the fleet continues to decline (-3.4%) and now accounts for less than half of the car fleet (49.7%). On the road, however, this share is higher (56%), due to more intensive vehicle use, but it has been falling steadily since 2014 as diesel cars tend to age and average annual mileage declines (-11% since 2019). Petrol engines, meanwhile, are on the rise in both the vehicle fleet and on the roads, with vehicles becoming newer and average mileage increasing. However, from 2022 onwards, this trend is slowing down with the development of hybrid engines, which account for a growing share of traffic (9.4% in 2024, compared with 3.5% in 2021) and of the vehicle fleet (6.6% in 2024, compared with 2.6% in 2021). Fully electric and other powertrains (excluding LPG), meanwhile, account for 2.5% of the vehicle fleet and 2.9% of traffic, which is explained by the fact that they are used more intensively and therefore cover more kilometres (13,511 km compared to 11,622 km for the average car).

Improvements in engine performance have narrowed the fuel consumption gap between petrol and diesel cars. From 2 litres in the early 1990s, it has now fallen to less than one litre. Since 2015, fuel consumption for petrol and diesel cars has fallen by 7.9% and 3.1% respectively. Since 2021, fuel consumption per vehicle has stabilised at around 6.7 litres per 100 km for a petrol car and 5.9 litres per 100 km for a diesel car.

The heavy goods vehicle fleet has been growing again since 2015 but did not increase in 2024. Fuel consumption per vehicle for heavy goods vehicles has been falling steadily since 2015 (-7%) and fell by a further 0.7% in 2024 to reach an average of 32 litres per 100 km. The heavy goods vehicle fleet now comprises 66% of EURO VI-compliant vehicles (87.5% for tractor units). There has also been a steady increase in the proportion of vehicles over 19 tonnes in the rigid truck fleet (65% by the end of 2024, compared with 57% in 2011). The renewal of the vehicle fleet, together with the increase in their load capacity, is helping to optimise the energy efficiency of road freight transport.

ROAD TRAFFIC AND CO_2 EMISSIONS

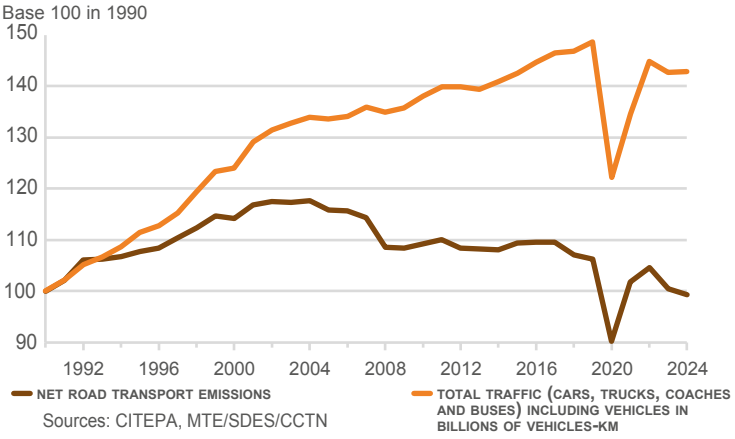
Following a historic decline recorded in 2020 against the backdrop of the health crisis, road traffic and associated CO_2 emissions rebounded in 2021 and 2022, but without returning to their pre-crisis levels. Following a 1.6% decline in 2023, road traffic stabilised in 2024 (+0.2%) at a level close to that of 2015. At the same time, CO_2 emissions from road transport fell by 4% in 2023, then by a further 1.6% in 2024. Compared with 2015, these emissions are down by 9.2% (compared with a 0.3% increase in traffic volume). For the first time, CO_2 emissions from road transport in mainland France are below their 1990 levels, whilst traffic volume has increased by 43% over the same period.

Various factors are behind the improvement in energy efficiency. The first is the fall in the average fuel consumption per vehicle of passenger cars in circulation and registered in France, which has fallen by 24% since 1990. This is the result of the shift towards diesel vehicles between 1990 and 2015, the bonus-malus system introduced in 2008, and the efforts of manufacturers and drivers. The trend was briefly interrupted in 2017, but in 2018, fuel consumption by passenger cars fell again, mainly due to greater efficiency gains for petrol than for diesel. Progress linked to the increasing adoption of hybrid vehicles continues: unit consumption has fallen from 6 l/100 km in 2017 to 5.9 litres in 2024 for diesel, and from 7.1 l/100 km to 6.7 litres for petrol. However, the growing share of petrol cars in the fleet and on the roads since 2015 is weighing on the average fuel consumption per vehicle in the fleet, which has stabilised at 6.2 litres per 100 km in 2024. Furthermore, the growth of electric cars, which emit no CO_2, is beginning to contribute to emissions reductions. They account for 3% of traffic in 2024. This trend will continue and grow, but its impact on reducing CO_2 emissions will be gradual.

As for energy efficiency in freight transport, this continues to improve. According to the latest estimates, the amount of CO_2 emitted by a commercial vehicle when transporting one tonne of goods over one kilometre within France fell by 29% between 1990 and 2024. This progress is mainly due to improvements in vehicle performance (better engine efficiency, larger vehicles allowing for higher load factors), optimised logistics (higher load factors, fewer empty returns) and the widespread adoption of eco-driving best practices.

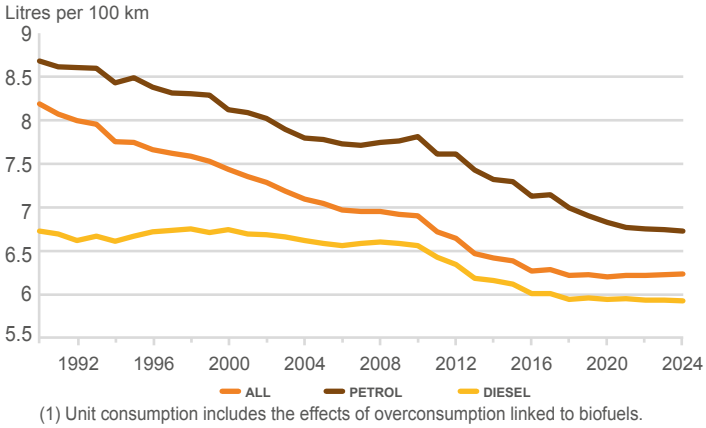
-16% **Decrease in CO_2 emissions from road transport in mainland France between 2004 and 2024**

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



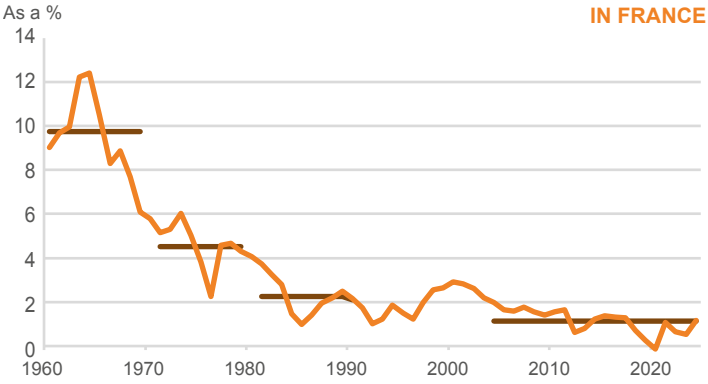
Sources: CITEPA, MTE/SDES/CCTN

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



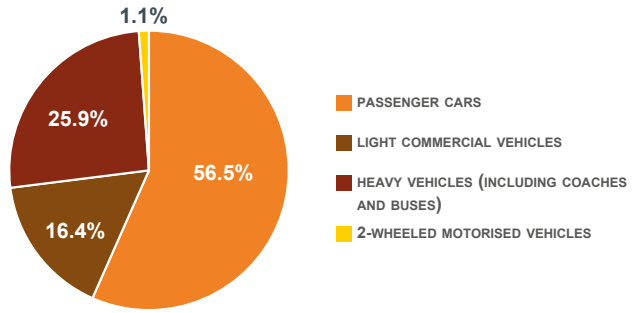
(1) Unit consumption includes the effects of overconsumption linked to biofuels.
Source: Road traffic report (MTE/SDES)

ANNUAL GROWTH RATE OF THE PASSENGER CAR FLEET IN FRANCE



Sources: CCFA, MTE/SDES

DISTRIBUTION OF CO_2 EMISSIONS FROM ROAD TRANSPORT IN 2024 (AS A %)



Source: Citepa / Secten (2025 Edition)

Private car traffic is determined by two factors: the car fleet and its average annual mileage. Over the long term, the growth rate of the vehicle fleet has slowed significantly following the initial phase of motorisation. It fell from an average annual growth rate of 9.7% between 1957 and 1970 to 4.5% in the 1970s and then 2.2% in the 1980s. Since 2004, the average annual growth rate has stood at 1.3%; it slowed significantly from 2018 onwards (to less than 1% per year) but remains positive.

The rise in multi-car households, followed by significant increases in fuel prices, are the main factors behind the decline in average annual mileage. Between 2000 and 2019, average annual mileage fell by 0.6% per year. Following a very sharp decline in 2020 (-19%) and a slight rebound in 2021 and 2022, it is set to fall by 3% between 2022 and 2024 and remain 7% below 2019 levels.

In 2024, new estimates from the Interprofessional Centre for Studies on Atmospheric Pollution (CITEPA) for road transport indicate CO_2 emissions net of renewable energy of 111 million tonnes s in mainland France, compared with 119 in 2019. Following the peak observed in the early 2000s, a sharp decline was recorded between 2004 and 2009, linked, among other factors, to the effects of the economic crisis, followed by a stabilisation until 2019. Travel restrictions and the rise in remote working caused road traffic to plummet in 2020, leading to a 15% drop in CO_2 emissions. Following a rise in 2021 and 2022, emissions levels fell again in 2023 and 2024, driven by a decline in traffic and the wider adoption of low-carbon vehicles.

In 2024, net CO_2 emissions from road transport, excluding renewable energy, were distributed, according to CITEPA, as follows: 56.5% for cars, 16.4% for light commercial vehicles, 25.9% for heavy goods vehicles, buses and coaches, and 1.1% for motorised two-wheelers.

NEW MOBILITY SERVICES

Technological advances, economic constraints and growing awareness of environmental issues have fostered, across several sectors, the development of new consumer trends and lifestyles that prioritise usage over ownership of goods.

In the transport sector, this trend has taken the form of new ways of using cars, promoting sharing and pooling and relying on information and communication technologies. Carpooling, car-sharing and peer-to-peer car hire are all part of these new consumer practices.

Car sharing helps to reduce vehicle running and maintenance costs and increases transport provision in suburban and rural areas, at a lower cost to the local authority. In densely populated areas, it also complements public transport (for carrying bulky items or during off-peak hours), improving vehicle occupancy rates, with positive effects on the environment and energy consumption.

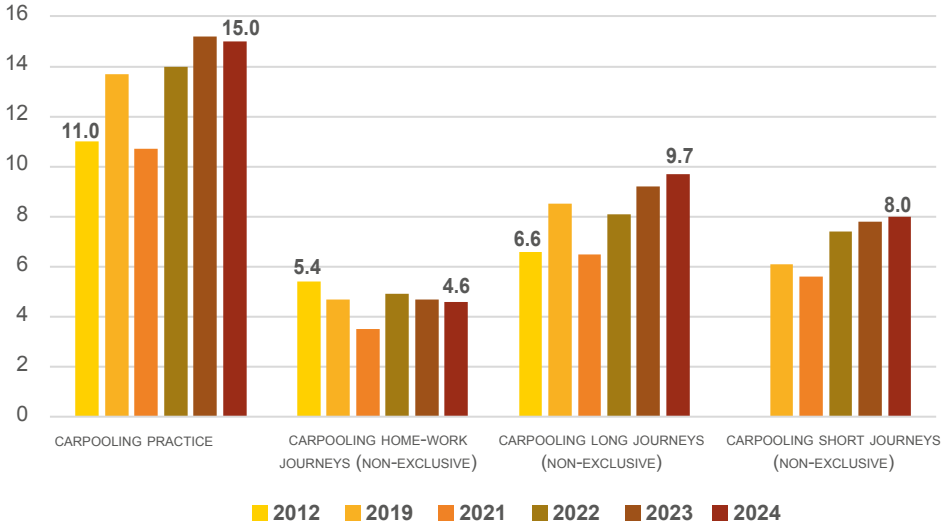
Among the developments, there has also been strong growth in chauffeur-driven cars (private hire vehicles), which have complemented the provision of private passenger transport, as well as the development of new mobility-related services (passenger information, route planning, ticketing, parking assistance).

Car manufacturers have adapted their offerings to these new needs and are positioning themselves as genuine mobility operators, creating new entities and brands dedicated to these activities (Mobilize, Free2Move) and by trialling a whole range of new services both in France and abroad: short-term rentals, car-sharing for businesses or individuals, 'free-floating', as well as chauffeur-driven hire services (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: the acquisition of Share Now and Kuantic by Stellantis, and the acquisition of and investment in various start-ups (Karhoo, iCabbi, Glide.io) by Renault.

15% of those surveyed had car-shared in 2024 (Parc Auto Survey)

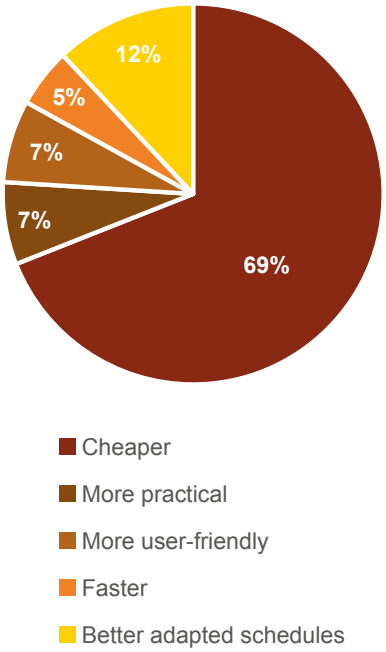
SURVEY ON THE PRACTICE OF CARPOOLING OVER THE LAST 12 MONTHS

As a % of respondents



Source: PARCAUTO TNS Sofres survey processed by CCFA and IFSTTAR

MAIN MOTIVATION FOR CARPOOLING (6T, 2015)



Source: 6t/ADEME

CARPOOLING

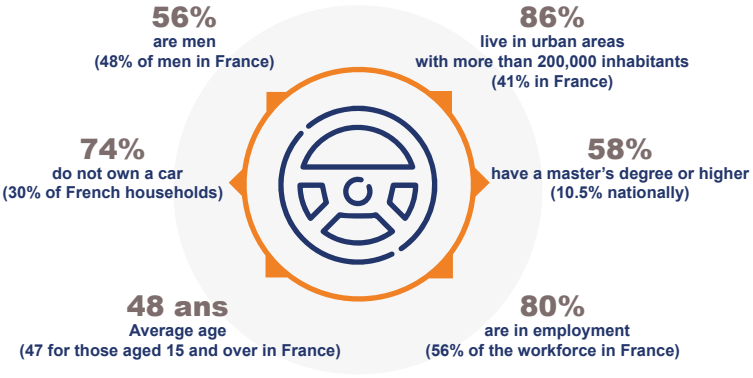
Carpooling is defined as "the shared use of a motorised land vehicle by a driver and one or more passengers, carried out free of charge, except for the sharing of costs, as part of a journey undertaken by the driver for their own account. Matching drivers and passengers for this purpose may be carried out for a fee" (Art. L. 3132-1 of the Green Growth Act). The 2019 Framework Law on Mobility strengthened support for carpooling by encouraging the creation of dedicated lanes, authorising local authorities to pay an allowance to drivers or passengers, and introducing the sustainable mobility allowance, which enables public or private employers to provide financial assistance for home-to-work journeys made using shared transport modes such as carpooling. Then, at the end of 2022, the government launched a major national plan for everyday carpooling, with €150 million in funding to be allocated between support for carpoolers – notably through a €100 bonus for first-time drivers – and support for local authorities to fund infrastructure (carpool areas and routes). The stated objective is to achieve 6 million additional daily carpool journeys by 2030. According to the DGITM, over two years, the number of new drivers has doubled and the number of journeys has increased by 33%. Furthermore, 560,000 carpooling grants have been paid out and nearly 400 additional carpooling areas have been created. 500 local authority projects have also been supported by the Green Fund.

However, figures from the Parc Auto survey show that, at national level, carpooling remains low. Following a decline in 2020, followed by a slight rebound in 2022 and 2023, it stabilises in 2024: 15% of those surveyed had made a carpool journey in the last 12 months. Carpooling for commutes remains stable (4.6% of respondents), whilst carpooling for journeys over 100 km increases slightly (9.7%, compared to 9.2% in 2023), as does carpooling for journeys under 100 km (8%, compared to 7.8% in 2023). For short journeys, carpooling is mainly carried out with friends and family for 82% of carpoolers. In contrast, for long journeys, carpooling via a matching service and with people outside one's social circle predominates (51%), although carpooling with friends and family has increased (49% in 2024, compared with 44% in 2022). The practice of exchanging financial compensation is more common for long journeys (67% of carpoolers) than for short journeys (25%) but is on the decline in 2024 (71% and 34% respectively last year).

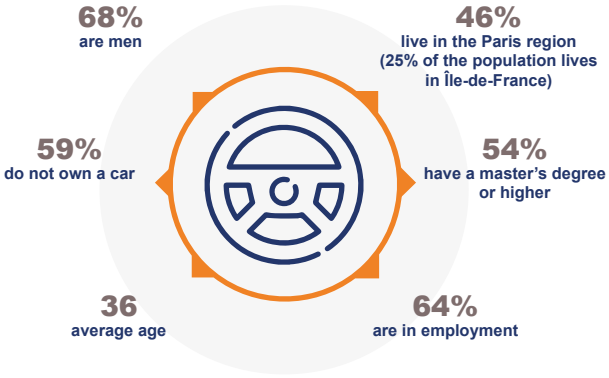
The national carpooling survey (Ademe 2025) compares the profile of carpoolers with that of non6carpoolers and shows that among carpoolers, the proportion of women is lower (48%, compared with 53% among non-carpoolers), that of higher socio-professional categories is higher (39%, compared with 24%), as is that of 18–34-year-olds (39% compared with 18%), resulting in a lower average age (43 years compared with 52 years). Furthermore, carpoolers own fewer cars (0.7 compared to 1.3). One of the main conclusions of the survey concerns the positive CO_2 balance of short-distance carpooling, which reduces the number of cars on the road. For long-distance travel, the CO_2 balance is neutral as carpooling tends to replace train travel, but the balance is positive in terms of purchasing power.

NEW MOBILITY SERVICES

PROFILE OF USERS OF LOOP-BASED CAR-SHARING IN 2022



PROFILE OF USERS OF FREE-FLOATING CAR-SHARING IN 2022



Source : Enquête Nationale sur l'Autopartage, 6t/Ademe, 2022

► LOOP-BASED CAR-SHARING SCHEMES IN 2022

2,8
rentals per user per month (3.1 for free-floating)

€35
median cost of a hire (€10 for free-floating)

25 Number of car-sharing operators in 2024 (Car-Sharing Barometer 2025)

► REASONS FOR JOINING A CAR-SHARING SCHEME

83%
Avoid problems related to vehicle maintenance

80%
lower cost compared to a private car

77,4%
Environmental friendliness of car-sharing

65,6%
Avoid parking problems

Source: National Survey on Car Sharing, office 6t / Ademe, 2022

CAR-SHARING

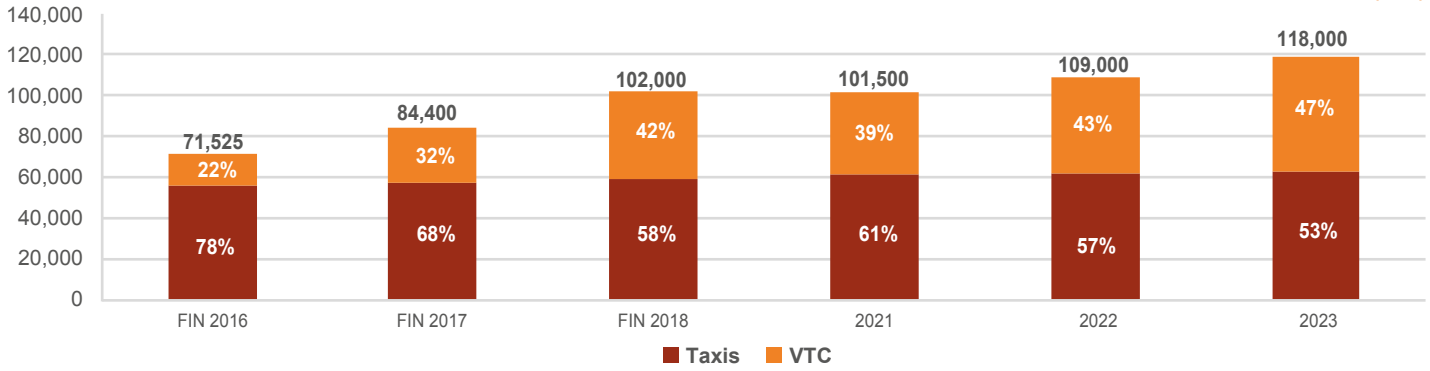
Car-sharing is defined in the Grenelle II Act (Article 54) as the sharing of a vehicle or a fleet of motorised land transport vehicles for the benefit of subscribers or users authorised by the organisation or individual managing the vehicles. Each subscriber or authorised user may access a driverless vehicle for a journey of their choice and for a limited period. A distinction is made between P2P car-sharing (rental between private individuals) and commercial car-sharing, which is either B2B (for a company's employees) or B2C (for private individuals). The Mobility Framework Act, passed in late 2019, provided a legal framework for car-sharing by giving mobility organising authorities (MOAs) the means to regulate self-service transport modes within their territory. They can do so by granting, through a 'car-sharing label', parking spaces reserved for car-sharing vehicles, provided they comply with the conditions defined by the AOMs (types of authorised vehicles, minimum number of rentals per month, etc.). Furthermore, as with carpooling, the law has allowed costs incurred through car-sharing to be covered by the sustainable mobility allowance.

The latest national survey on car-sharing (Ademe, 2022) confirms that loop car-sharing dominates in terms of the number of operators and cities served. As was observed in 2019, the profile of users of this type of car-sharing is predominantly male (55% men, compared with 48% in France), urban (86% live in urban areas with over 200,000 inhabitants, compared with 41% in France), educated (58% hold a master's degree, compared with 10.5% in France) and in employment (80%, compared with 56% in France). They use car-sharing services on a regular basis for short-term hire (less than 5 hours and less than 50 km), for journeys within their local area and for non-essential purposes (visiting friends, going out, shopping, etc.). The profile of users of free-floating car-sharing (no booking, no stations) and their usage patterns differ, as these two services meet different mobility needs. With free-floating, rentals are very short (less than 1 hour and less than 20 km), regular, for journeys within the local area and for everyday travel. Finally, for all users, the main reasons for signing up are linked to the cost and maintenance issues associated with owning a private car (80% and 83% of respondents), followed by environmental concerns (77% of respondents), and then the desire to avoid parking problems (66% of respondents).

According to the latest Barometer from the Association of Car-Sharing Operators, the number of people registered with a car-sharing service is expected to rise by 11.5% by 1 January 2025, following a 6.5% decline the previous year. There are over 1 million subscribers, with 25 operators in France offering 13,862 shared cars, of which 16 offer a so-called 'loop' service (collection and return of the vehicle at a station, by reservation and for a set duration), 3 offering free-floating (no booking, no station) and 6 offering both. Loop-based car-sharing dominates the market in terms of both the number of vehicles (9 out of 10) and the number of users (7 out of 10), but accounts for only 8% of electric vehicles in its fleets, compared with 63% in free-floating fleets.

NEW MOBILITY SERVICES

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



Source: National Observatory for Private Passenger Transport, CGDD, June 2025

CHAUFFEUR-DRIVEN TRANSPORT VEHICLES (VTC)

The private hire vehicle sector falls under private passenger transport (T3P), as defined by the Transport Code, which also includes taxis and two- or three-wheeled motorised vehicles, commonly known as motorbike taxis.

Since their arrival in France in the early 2010s, private hire services have helped to expand mobility options by offering a pre-booked passenger transport service. However, their rapid growth has raised numerous questions regarding their legality and the competition they might pose to taxis, leading the authorities to review the current regulations.

Originally, the status of a chauffeur-driven car (VTC) was derived from the status of a 'grand remise' and the profession of 'Grand Remisier', drivers of luxury passenger cars. In 2009, this system was reformed by the Novelli Act, which deregulated the sector and established the status of a chauffeur-driven passenger car. The Thévenoud (2014) and Grandguillaume (2018) Acts established new regulations applicable to private hire vehicles, now referred to as 'chauffeur-driven cars', and clarified the scope of the profession.

As a result, today, the private hire vehicle sector is subject to specific licensing and operational requirements that distinguish it from the taxi industry.

- 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 classic cars) and meet certain technical specifications (size, power).
- The driver must obtain a private hire driver's licence and register with the national register of private hire operators.
- The customer must book the vehicle in advance. The vehicle may therefore neither park nor drive on public roads in search of customers. Electronic hailing is prohibited and remains the exclusive preserve of taxis.
- The fare is entirely unregulated, unlike taxi fares, which are regulated and set by decree.

The National Observatory for Private Passenger Transport, established in 2017, produces an annual report on the sector. In 2023, there were 56,000 active drivers on private hire platforms and 62,800 taxis in France. The number of private hire vehicles has risen sharply since 2016. They now account for 47% of the private passenger transport market, compared with 22% in 2016. In 2023, the number of taxis increased by 1.3%, whilst the number of ride-hailing vehicles rose by a further 19%. The concentration of taxis relative to the population is very high in rural areas and in the Île-de-France region. Ride-hailing vehicles, meanwhile, operate almost exclusively in major cities.

Manufacturers are partnering with various operators to supply 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. The Mobilize Driver Solutions offering provides a range of 100% electric vehicles and services in Paris and Madrid, entirely dedicated to taxis and private hire vehicles.

CAR-SHARING BETWEEN PRIVATE INDIVIDUALS

Car-sharing outside the private sphere has also grown and has been facilitated by the development of platforms connecting private individuals. Car hire between private individuals allows vehicle owners to rent out their cars when they are not using them, thereby offsetting some of the fixed costs associated with ownership or maintenance. This differs from car-sharing between private individuals, which involves sharing one or more cars amongst several people who have previously agreed on the terms of use.

According to the PARC AUTO survey, the rental rate remains stable in 2024 (6.1% of the sample used the service, compared with 8% in 2019). Holidays remain the main reason for renting, followed by weekends. As for peer-to-peer car hire, more than nine in ten people still say they are very reluctant to make a car available or hire one via a platform. Yet this sector is growing: 15% of households that hired a car in 2023 had used peer-to-peer car hire, compared with 7% in 2019.

THE B2C AND B2B OFFERINGS OF FRENCH CAR MANUFACTURERS:

The Renault Group has consolidated all its mobility services under the Mobilize brand, which, in addition to financial services (Mobilize Financial Services), offers car-sharing services in France via the Mobilize Share app, as well as traditional car hire services. The Zity brand, which offered free-floating electric car-sharing services in several European capitals (Paris, Madrid, Lyon, Milan), has gradually ceased its operations, which offered too little prospect of profitability and encountered numerous practical problems. However, the group continues to offer services tailored to the needs of operators and drivers of taxis and private hire vehicles (matching, installation of charging systems), as well as services for mobility operators to optimise their fleets (Glide.io technology).

The Stellantis Group, for its part, operates its mobility services under the Free2Move brand (car-sharing, rental, subscriptions, parking, B2B solutions) and its app of the same name, and Leasys (long-term rental & fleet management). Free2Move offers self-service car-sharing in Paris, Madrid, Lisbon, Washington DC, Portland, Denver and Columbus, and has strengthened its car-sharing offering 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. In addition to car-sharing, Free2Move offers ride-hailing services, short- and long-term rentals, and fleet management for businesses.

47% Share of private hire vehicles in Private Passenger Transport (T3P) in 2023

THE CONNECTED AND AUTOMATED VEHICLE

The connected vehicle is based on communication and the sharing of information between vehicles or between vehicles and road infrastructure, using wireless connectivity systems (Bluetooth, 5G, GNSS) that enable various services to be provided (entertainment, geolocation, traffic information, energy consumption calculation). The development of advanced electronic driver assistance systems (ADAS) also makes driving easier (parking assistance) or safer (intelligent speed adaptation, warning systems) using sensors. Some of these safety features are now mandatory under European regulations.

Vehicle automation has been defined by the Society of Automotive Engineers (SAE) through a classification system that distinguishes between driver assistance systems (levels 1 and 2) and systems where the driver can delegate the task of driving (levels 3 to 5). The Vienna Convention, adopted in 1968, restricted driving to levels 1 and 2 by requiring the presence of a driver who had to be in control and remain in command of their vehicle. In 2016, an initial amendment authorised automated driving systems or systems with delegated control (i.e. Level 3), provided that the driver remained in control of the vehicle and that these systems complied with UN regulations. In July 2022, an amendment to the Vienna Convention permitted the operation of driverless vehicles, but subject to certain conditions.

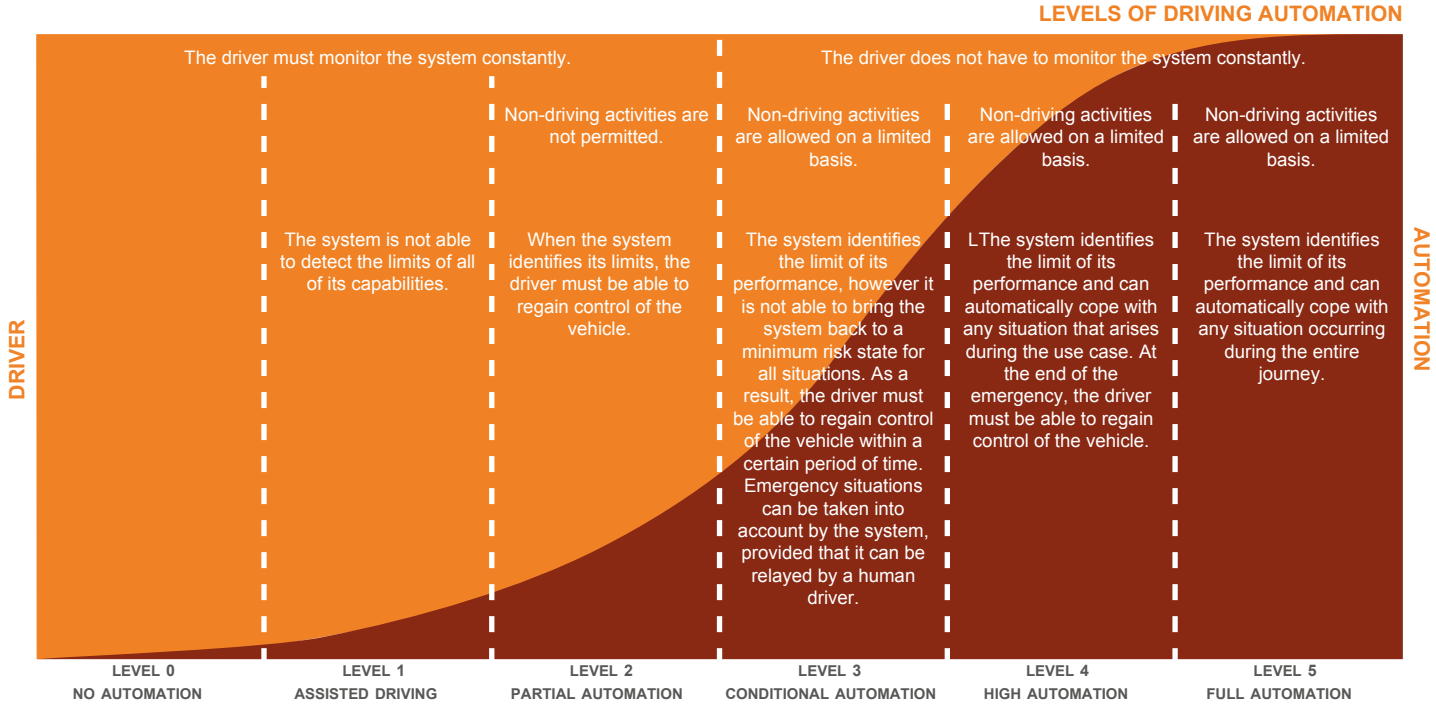
From a technical perspective, the first regulation on Level 3 automation is UNECE Regulation No. 79, which concerns the type-approval of vehicles with automated lane-keeping systems and was adopted in June 2020. This low-speed driving assistance system may be activated by the driver only on eligible separated carriageways and at a maximum speed of 60 km/h. Its entry into force in January 2021 marked a significant step towards the deployment of Level 3 autonomous vehicles. Subsequently, the European regulation of 5 August 2022 defined the type-approval of fully automated vehicles. At the international level, a similar UN regulation is currently being drafted.

From a legal perspective, the Act of 17 August 2015 on the energy transition for green growth legally defines 'autonomous vehicles' as vehicles with partial or full delegation of driving control, whether they are used for the transport of goods or passengers. The 2019 Framework Law on Mobility subsequently enabled the adoption of various key provisions for the development of automated mobility, particularly regarding criminal liability. These provisions, which came into force on 1 September 2022, were extended to road freight transport in November 2024.

Vehicle automation and connectivity enable the provision of new services related to driving and road safety (warning systems, data feedback), focused on the vehicle itself (maintenance and repair services), relating to road infrastructure (traffic management or infrastructure management) or the driver (insurance services or infotainment services).

Several use cases for automation have been identified, both in passenger transport (autonomous valet parking, urban shuttles in closed or open sites, robot taxis) and in freight transport and logistics (closed sites, last-mile logistics, long-distance transport), but they must demonstrate their economic viability. For the two major French manufacturers, Levels 4 and 5 may prove viable in public transport. It is with this in mind that Renault is working with the Chinese firm WeRide on a Level 4 minibus. For private use, Renault has indicated that it will remain at Levels 2 and 2+ for the time being, whilst Stellantis has announced that Level 3 autonomous driving will be available within a few years. To ensure their long-term development, these technologies will need to find their market.

2,000 days of testing
135,000 km travelled
for the SAM project



Automation levels were defined by SAE J3016.

GOVERNMENT SUPPORT FOR THE DEVELOPMENT OF AUTONOMOUS AND CONNECTED VEHICLES

Public policy has focused on three key issues raised by automation: safety (through regulation), sustainable development (by steering use cases towards public and shared transport) and interoperability (data exchange, supervision, remote intervention). The national strategy for the development of autonomous vehicles, launched in 2018 by France, has enabled the establishment of a regulatory framework to ensure the safety of the services offered and to support trials. In its 2022–2025 phase, the strategy has focused on the roll-out of connectivity and data exchange, the deployment of use cases through support for local authorities, the funding of investment projects in vehicle and service provision, and the finalisation of regulations applicable to freight transport. It has set a target of 100 to 500 automated passenger transport services, with no operators on board, by 2030.

THE CONNECTED AND AUTOMATED VEHICLE

In 2019, the LOM Act introduced various provisions for automated driving, particularly regarding criminal liability in the event of an autonomous vehicle being on the road. A decree which came into force on 1 September 2022 establishes that, from now on, the driver of a vehicle using an automated driving system is not held criminally liable in the event of an offence if, at the time of the incident, the system is exercising dynamic control of the vehicle. It also sets out the respective responsibilities of the driver and the manufacturer or designer of these systems, as well as the obligations to inform drivers. These provisions cover levels of automation up to so-called 'fully automated' systems, provided they are under the supervision of a person responsible for remote intervention and are deployed on predefined routes or in predefined areas.

The State also supports investment in autonomous vehicles through the Future Investment Programmes (PIA). PIA3 provided funding for the SAM and ENA trial programmes (see below). PIA4, with a budget of €200 million, enabled the launch of the call for projects on "automated road transport, connected and low-carbon service infrastructure", resulting in the selection of eight winners (including the 5G Open Road project) offering automated passenger transport services in various forms (regular services, on-demand transport, feeder services to multimodal hubs).

Trials and tests of connected and autonomous vehicles

In France, the regulatory framework for trials was established by the Order of 3 August 2016, which requires prior authorisation from the Minister for Transport for the experimental operation of vehicles with partial or full driving delegation on a road open to public traffic. This was supplemented by the so-called 'Pacte' law, which authorises trials of vehicles with the highest levels of automation under an adapted liability regime, and by the LOM law governing the framework for the operation of autonomous vehicles. Since late 2014, more than 140 trial authorisations have been issued.

The EVRA (Autonomous Road Vehicle Testing) call for projects, funded by PIA 3 as part of the France Autonomous Vehicles programme, has enabled the launch of two major testing projects in France. The SAM (Safety and Acceptability of Driving and Autonomous Mobility) project, led by a consortium of mobility stakeholders (manufacturers, transport operators, local authorities, infrastructure managers, research laboratories) and coordinated by the PFA, has been working for four years (until the end of 2023) on a variety of use cases (public transport, last-mile delivery, etc.) with 40,000 users across 13 regions. The ENA (Experiments with Autonomous Shuttles) project, led by Gustave Eiffel University, brings together a consortium of seven companies, two academic institutions and two regions. It enabled an automated shuttle service to be tested for several months in Sophia Antipolis (April 2022), followed by a transport service in the sparsely populated rural area of Cœur de Brenne (July 2022).

The 5G OpenRoad project, which concluded at the end of 2024, enabled the benefits of 5G to be tested on public roads. Launched in April 2022 and coordinated by the PFA and Nokia with a budget of €90 million, it brought together 17 private and public partners. Its aim was to test various use cases on public roads (the Saclay and Vélizy plateaus) using Level 2 vehicles (Renault and Stellantis), robot taxis, Level 4 autonomous shuttles and droids.

At European level, several projects are co-funded by the European Commission. The work of the SCOOP project (2014–2019), focusing on the deployment of cooperative intelligent transport systems, has been continued through other projects such as InterCor (dedicated to freight), InDid and C-Roads (development of real-time traffic information services in Bordeaux using the COOPITS app). The 5GMED project brings together 21 stakeholders to test and deploy 5G on road and rail between France and Spain. More recently, the SELFY, AWARE2ALL and BERTHA projects have also been co-funded by the EU under its Framework Programme for Research and Innovation for the period 2021–2027 (Horizon Europe).

To successfully carry out trials of autonomous and connected vehicles, there are also various dedicated test centres. TEQMO was inaugurated in June 2019 by UTAC in Montlhéry and funded through the PIA and the Île-de-France Region. It comprises 12 km of test tracks, including a motorway circuit, an urban area and a manoeuvring zone, and features 5G connectivity. Transpolis, in which Renault Trucks is a partner, is a test town located in the Ain region dedicated to innovation and safety and is notably home to the ENA project.

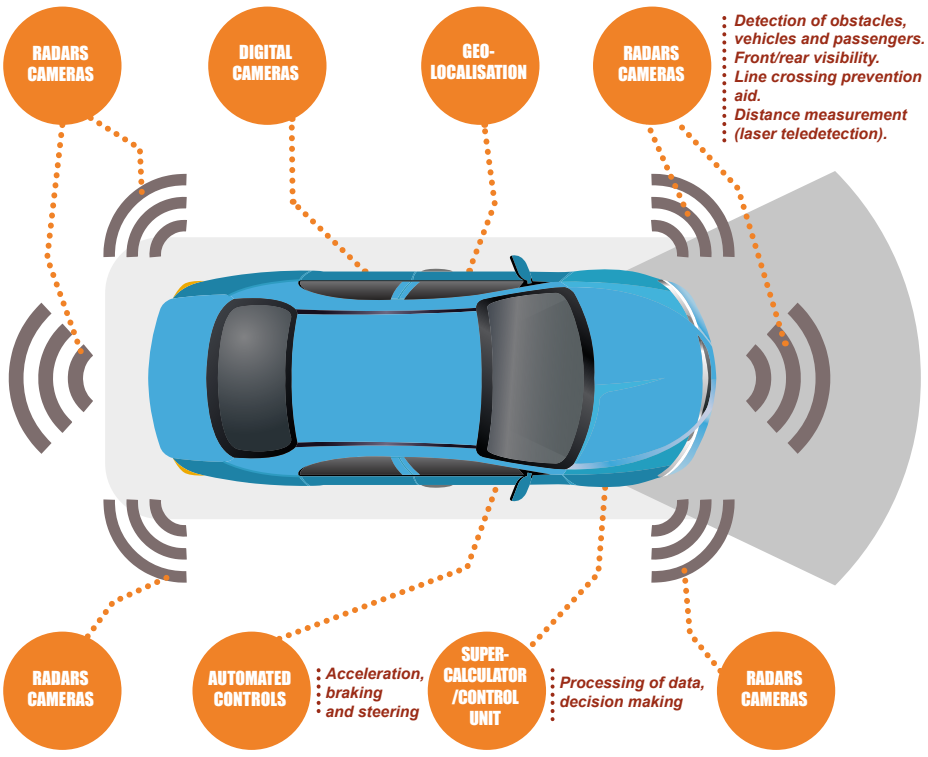
The issue of access to vehicle data

The increased use of automated vehicles will generate more data for various purposes, with a significant impact on the development of mobility services. The rules governing the management of this data, where it is personal, are a major issue for the protection of individuals' privacy. In this regard, the European General Data Protection Regulation (GDPR), which came into force in May 2018, strengthens the protection of users' personal data. In France, the LOM Act has also established rules governing the provision of certain data to public authorities or infrastructure managers. Numerous projects (MOSAR, 3SA, SVR, EVA, CTI, etc.) have been launched in recent years to address cybersecurity challenges, with security measures at the vehicle level, as well as at the infrastructure and centralised control levels. Furthermore, European regulations on cybersecurity and cooperative intelligent transport systems represent significant contributions, complemented by 'soft law' rules through the CNIL's compliance package for connected vehicles, which is currently under development, and technical standardisation (ISO).

The 'Extended Vehicle' (ExVe) is a concept that car manufacturers, together with major equipment suppliers and independent distributors, have sought to standardise at international level (ISO) since 2014. It reflects the concern to take into account the expansion of the scope of the vehicle, which is now highly connected, along with the implications such an expansion has for the integrity and security of the system. Extended Vehicle standards establish a system enabling consistent, 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 framework in which car manufacturers play a decisive role (see the Deloitte/Fréget report of January 2020). The development of artificial intelligence plays a key role in driving innovation and the digital and ecological transformation of the automotive sector.

16 major mobility players collaborating to create 5G OPEN ROAD

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



PASSENGER TRANSPORT PRICE INDEXES

In 2024, the slowdown in inflation to 2%, down from 4.9% in 2023, is reflected in the price indexes for the various modes of passenger transport, notably due to the fall in energy prices (petrol, electricity). Prices for personal vehicle expenditure (purchases and running costs) are stabilising (+0.1% after +4.5%). This slowdown is mainly due to the fall in fuel prices for running costs and the fall in used car prices for the 'vehicle purchases' component. Over two years, the increase in the price index for private vehicles is much lower (+4.6%) than that observed for other modes (+9.7% for rail, +13.3% for air).

In road passenger transport, the rise in prices halved, with growth of 2.7% in 2024, following +5.6% in 2023. Prices for 'coach and bus transport' also slowed significantly in 2024, falling from a 5% rise to 1.2%, whilst prices for 'taxis and chauffeur-driven cars' continue to rise sharply, at +4.6%, compared with +6.5% last year. In air transport, prices rose by more than 10% last year. This year, they are seeing a much more moderate increase of 2.7%. Finally, rail transport prices are also experiencing a marked slowdown (+2.7%, compared with +6.8%), driven by an increase in supply and the expansion of market opening.

Over the last twenty-five years, price indexes for the various modes of passenger transport have evolved differently. Since 2000, real price indexes - that is those adjusted for the general consumer price index - have risen by 29% for private passenger transport (taxis, private hire vehicles) and by 15% for private vehicles. As for air and rail transport, prices have risen by 21% and 16% respectively. The price of road passenger transport (buses, coaches), meanwhile, has fallen by 5% since 2000. In rail passenger transport, real prices rose by 19% between 2000 and 2015, but fell over the following five years, with a collapse in prices in 2020 linked to fare adjustments following the lockdown. In 2024, they remain 3% below their 2015 level.

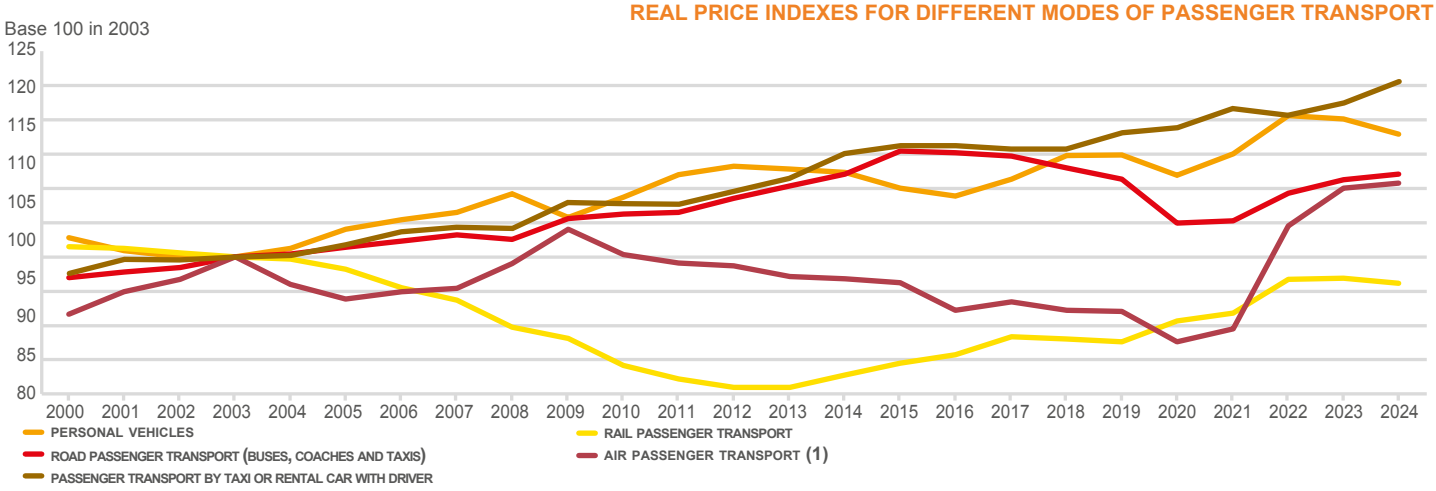
+0.1% **Stability in 2024 of the price index for private vehicles**

► 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%
2024	+0.1%	+2.7%	+2.7%	+1.2%	+4.6%	+2.7%

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 inclusive of all taxes. Thus, for air travel, airport taxes are included; similarly, for other modes, infrastructure-related costs are only included to the extent that they can be incorporated into the selling price. Furthermore, only the portion directly paid by the household is tracked. For example, if a region or local authority decides, as part of a spatial planning policy or social measures, to subsidise part of the transport costs, a decrease will be recorded in household expenditure. Fuel surcharges are incorporated into the monitoring of the passenger air transport index.

The indexes for rail and road passenger transport mainly cover inter-city routes. The index for private vehicles was compiled considering both the purchase cost and the cost of using private vehicles. To track changes in the real prices of these main modes of transport, these various indexes are adjusted by the general consumer price index in the graph above.

After remaining close to their 1995 levels, the real price indexes for the various modes of passenger transport have, since 2003, shown stronger and more contrasting trends: between 2003 and 2019, the real index for private vehicles (purchases and use) rose steadily (+15%), except for the years 2014 to 2016. The decline observed in 2020 was also an exception, but a recovery took place in 2021 and 2022. Between 2015 and 2024, the real price index ultimately rose by 7%. The real index for rail transport rose between 2000 and 2015, then fell steadily until 2020. Despite the rise in prices since then, the index in 2024 remains 3% lower than in 2015. The index for passenger road transport (coaches and buses) fell sharply until 2013 but has been rising steadily since then. The price-lowering effect linked to the opening of the long-distance coach market to competition in 2015 has, in fact, quickly faded. Market consolidation, rising operating costs (wages, fuel) and the readjustment of business models have driven up prices, which rose by 14% between 2015 and 2024. Prices for private passenger transport (taxis, private hire vehicles) have, meanwhile, risen steadily (+29% between 2000 and 2024). Finally, the real air transport price index fell for a long period starting in 2009, but has risen sharply since 2021, reaching a 21% increase over the 2000–2024 period, including a 15% rise since 2015.

FREIGHT TRANSPORT PRICE INDEXES

In 2024, against a backdrop of falling inflation and sustained robust growth in the United States and Asia, global trade increased by 2.9% for goods and 6.8% for services. In France, freight transport activity rebounded by 2.5% in 2024, largely thanks to the recovery seen in the fourth quarter. Prices, meanwhile, showed mixed trends.

In maritime freight transport, prices rose by 11.3% in 2024, after falling sharply last year due to overcapacity issues. This price rise is also attributable to the crisis in the Red Sea, which is forcing cargo ships to avoid the area by sailing around the Cape of Good Hope, thereby extending transport times and consequently increasing costs.

In air freight, the decline in prices continued in 2024, falling from -21.8% in 2023 to -2.5%. This is mainly due to the fall in kerosene prices, driven by the drop in oil prices, but also to increased competition and pressure from low-cost cargo airlines.

In road transport, however, prices continue to rise, but at a slower pace than in 2023 (+1.2%, compared with +3.6% in 2023) due to the slowdown in fuel prices.

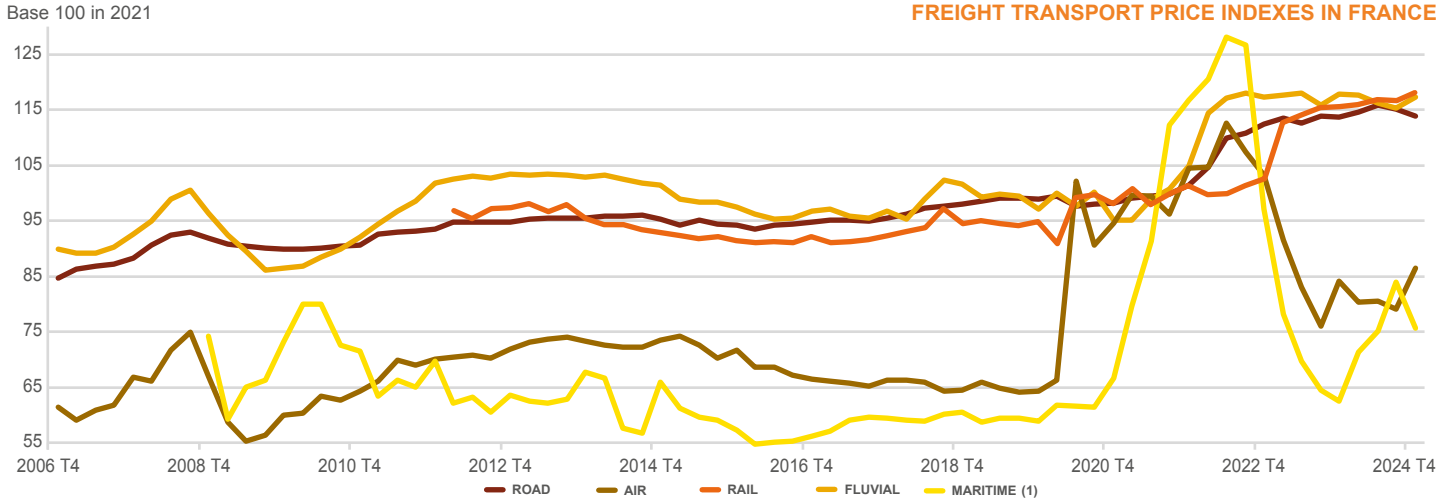
Finally, in rail transport, prices, which had risen sharply in 2023 (+13.5%), continue to rise but at a much slower pace in 2024 (+2.1%), due to the fall in electricity prices.

Since 2006, the road freight transport price index has risen steadily, by an annual average of 1.8%, but accelerated to 4.7% per year between 2020 and 2023. Over the same period, the price indexes for inland waterway and air transport have shown more erratic trends and significant increases from 2019 onwards. Over the entire 2006–2024 period, prices rose by an annual average of 1.5% in both inland waterway and air transport.

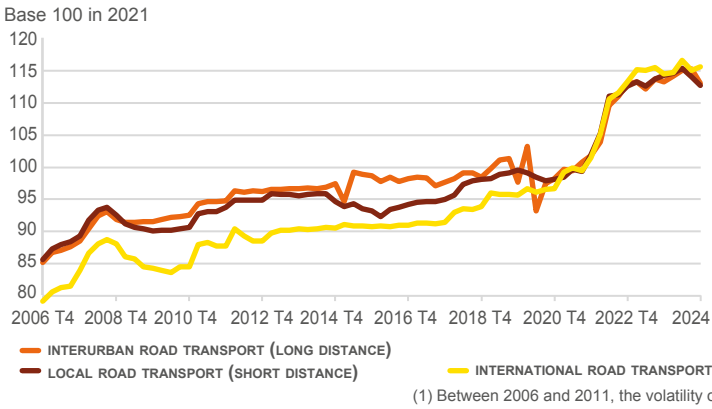
For rail transport, the price index has only been published since 2014, with data dating back to the first quarter of 2012. Between 2012 and 2019, prices were falling but, since 2020, they have risen sharply, both for domestic and international rail services. Between 2020 and 2024, prices rose by 4.8% per year. Since the sector was opened to competition in 2006, new operators have expanded and now account for more than half of the tonne-kilometres transported (58% in 2024 compared with 44% in 2019).

+25% **Rise in the rail freight transport price index since the end of 2019**

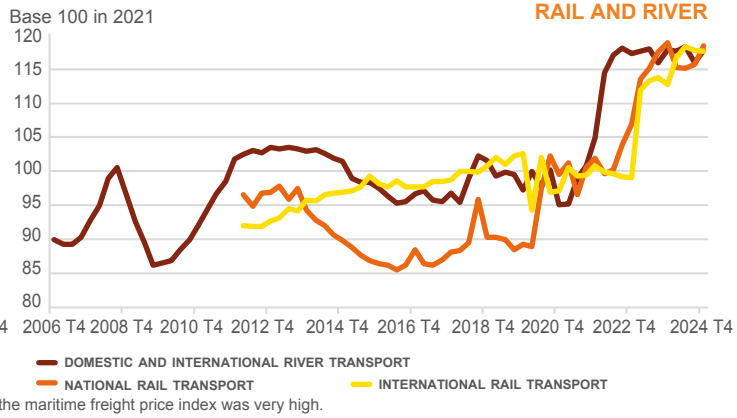
FREIGHT TRANSPORT PRICE INDEXES IN FRANCE



FREIGHT TRANSPORT PRICE INDEXES IN FRANCE: ROAD



FREIGHT TRANSPORT PRICE INDEXES IN FRANCE: RAIL AND RIVER



(1) Between 2006 and 2011, the volatility of the maritime freight price index was very high.
Source: MTE/SDES

Freight transport price indexes are calculated by the SDES statistical service of the Ministry of Transport. For road, inland waterway and rail transport, the indexes are compiled using the so-called 'representative services' methodology, defined by the points of loading and unloading, the type of goods and the characteristics of the contract between the shipper and the carrier. Price surveys are carried out quarterly. In road and inland waterway transport, only activities carried out on behalf of third parties by companies based in France, for which freight transport is the main activity, are monitored.

For rail transport, the price index, which has been tracked since the first quarter of 2012, is compiled based on 111 representative transport services, entrusted by a sample of shippers to rail transport operators.

For air freight, the index comprises freight transport services originating in France under an air waybill. The service is defined by the place of unloading and by the airline responsible for 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 transport. This price index is linked to the high volatility of fuel prices.

For maritime transport, the price index comprises transport services provided on behalf of third parties by companies registered in France whose business is maritime freight (bulk and ferry). It is based on international price indexes, unit prices and tariffs. This price index is highly volatile, linked to changes in bulk freight rates.

For road freight, intra-annual fluctuations are less pronounced than for inland waterway or air freight, even though fuel accounts for over 20% of the total costs of road freight transport, as shown by the CNR survey (see page 63).

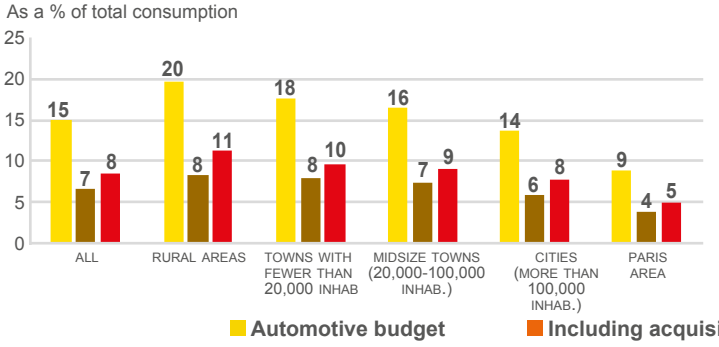
THE COST OF HOUSEHOLD CAR MOBILITY

According to the latest "Family Budget" survey from 2017, households in mainland France spend an average of 15% of their budget on motoring. This budget ranges from 20% for rural households to just 9% in the Paris metropolitan area and accounts for more than half (57%) of vehicle-related expenditure (fuel, repairs, maintenance, tolls, insurance). These running costs amount to 8% of the total budget but rise to 11% for rural households and 9% on average for households in the top three income quintiles (compared with 7.4% for the fifth quintile). The largest item within this category is fuel, which accounts for 4% of the total and reaches 6% in rural areas, compared with just 2% in the Paris metropolitan area. The least affluent households (Q1–Q3) also devote a larger share of their budget to this item (4.3%) than the wealthiest households in the 5th quintile (3.3%). Finally, a breakdown by socio-professional category also reveals significant contrasts in terms of car-related expenditure. The category of managers and white-collar workers, who frequently hold jobs in the service sector in urban areas, devote a smaller share of their budget to motoring (13% and 15% respectively). Conversely, the categories of farmers, manual workers and tradespeople and shopkeepers, who are less common in urban areas and more reliant on their vehicles for work, spend 18% of their budget on motoring.

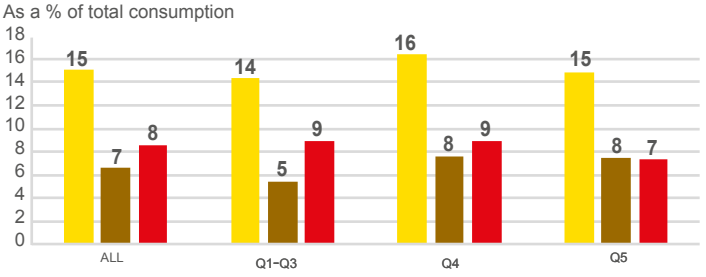
6% **Share of fuel expenditure in the budget of rural households according to the "2017 Family Budget" survey**

►AUTOMOTIVE BUDGET IN 2017

BY RESIDENCE AREA



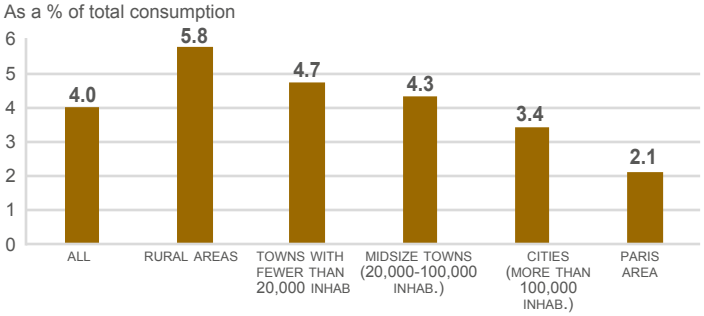
BY INCOME QUINTILES



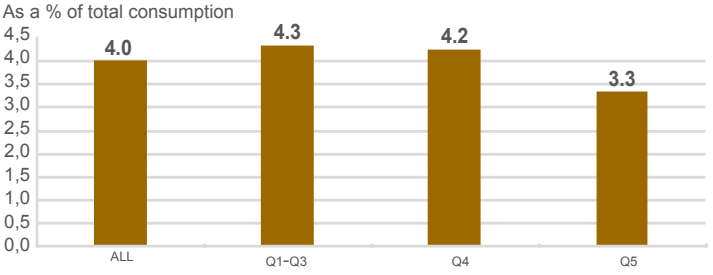
Automotive budget | Including acquisition expenses | Including operating expenses

► SHARE OF FUEL IN HOUSEHOLD CONSUMPTION IN 2017

BY RESIDENCE AREA



BY INCOME QUINTILES



Source: INSEE, Family budget survey 2017

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

Regarding car-related expenditure, there are two significant differences compared with national accounts (page 63). In the treatment of transport insurance expenditure, the full amount is considered in the surveys, whereas only the net service (expenditure minus reimbursements) is recorded at the macroeconomic level.

As regards expenditure on second-hand vehicles, the full amount is recorded in the surveys, whereas at the macroeconomic level, this expenditure mainly corresponds to the margins of professionals involved in a transaction and does not take into account transactions between private individuals.

The budget survey used in this edition is limited to mainland France. The breakdown of the various automotive expenditure items is expressed as a percentage of total consumption excluding taxes, duties, loan repayments and major repairs. 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 mainland households accounted for 15% of their total expenditure. The purchase item accounts for less than half of the total (43%), ranging from 5% of the budget for the 60% of households with the lowest incomes (Q1–Q3) to nearly 8% for the V quintile. Conversely, the 'running costs' category accounts for a larger share of expenditure for households in the lowest quintiles (9%) compared with 7.4% for the fifth quintile. This disparity is particularly linked to the weight of fuel costs, on which the lowest-income households spend 1 percentage point more of their budget than the highest-income households. The same phenomenon is observed for transport-related insurance, which accounts for 2.6% of the budget of the lowest-income households. As these two items are the most heavily taxed, it follows that households in Q1–Q3 pay, in proportion to their car usage, more tax than households in the top quintile.

When broken down by category of municipality of residence, the fuel expenditure appears all the higher the smaller the municipality. Thus, households in the Paris metropolitan area spend nearly 2% of their budget on fuel, compared with over 6% for households in rural municipalities, which have less access to public transport and travel more frequently and over greater distances.

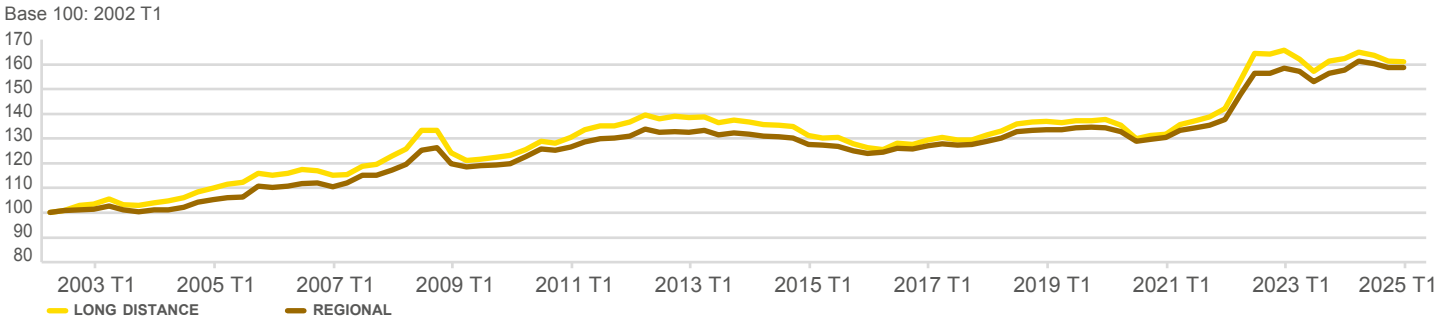
With the rise of electric vehicles, which have a higher unit price, low-income households will find it increasingly difficult to purchase them, given the small proportion of their expenditure currently allocated to vehicle purchases. Furthermore, the use of the second-hand market for buying electric cars is still limited by low volumes.

COST PRICE OF ROAD FREIGHT TRANSPORT

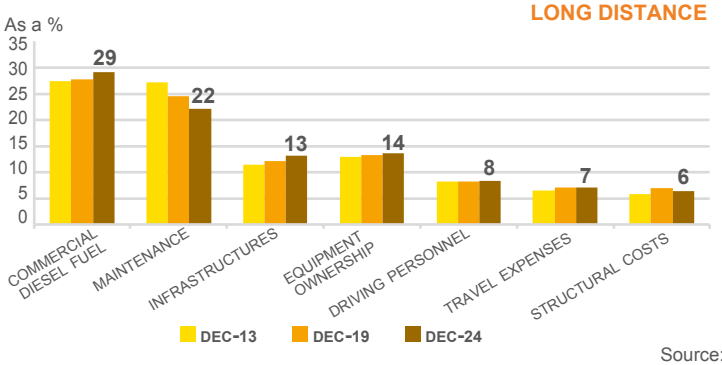
+2,4% **Rise in the full cost of regional road freight transport in 2024**

The composite indexes calculated by the Comité National Routier (CNR) indicate that the cost price of road freight transport, after rising very sharply in 2022 and stabilising in 2023, rose again in 2024. Excluding fuel, the increase in costs reached +5.3% on an annual average for regional freight transport and +4.9% for long-distance transport. The rise is driven by the increase in driving staff costs (+6.8% on average), which account for between 30 and 40% of total costs. Statutory minimum wages remained unchanged in 2024, but some companies implemented voluntary pay rises, and the reform of the Fillon tax relief measures was adopted, leading to an increase in wage costs. Overhead costs, which account for around 13% of the total, rose by an average of 4.7%, linked to increases in the costs of office and administrative staff as well as premises. Finally, the cost of equipment, which accounts for between 13% and 20% of costs depending on the type of operation (regional or long-distance), rose by around 3.5%.

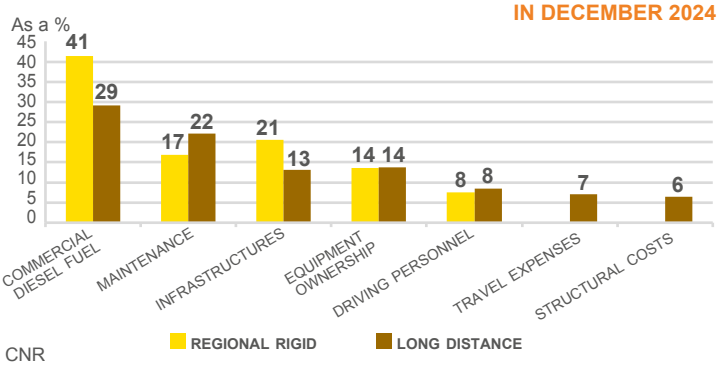
COST OF ROAD FREIGHT TRANSPORT



COST STRUCTURE OF ROAD FREIGHT TRANSPORT: LONG DISTANCE



COST STRUCTURE OF ROAD FREIGHT TRANSPORT IN DECEMBER 2024



Source: CNR

The Comité National Routier (CNR) publishes several indexes each year reflecting changes in the cost of road freight transport carried out for hire or reward. The two indexes used here relate to long-distance transport and regional transport.

Long-distance transport refers to national or international journeys carried out using articulated lorries of up to 44 tonnes, where operational constraints make it impossible or uncertain for the driver to return home daily. Regional transport, carried out using vehicles with a gross weight of between 3.5 and 19 tonnes, refers to transport within a region and neighbouring regions, where operating conditions allow the driver to return home daily.

The cost structure derived from the CNR's annual survey depends both on changes in each component and on the associated operating conditions (mileage covered, number of hours worked). Consequently, the weight of a cost item within the structure may vary differently from what changes in its unit cost might suggest. Here, we are primarily interested in changes in the cost structure, as this better reflects the reality experienced by transport operators.

The CNR has now included the CICE in the calculation of its indexes since 2013, the year it came into force, to make them comparable with the post-2019 period. The CICE was, in fact, converted from 1 January 2019 into a permanent reduction in employers' social security contributions.

In long-distance road freight transport, the largest item of expenditure is driving staff, whose share has remained stable since 2013, at around 29% (29.1% in 2024). The second largest expense, 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 2024, with the fall in fuel prices, it fell by 2 percentage points for the second consecutive year to stand at 22.1% of the total. Overhead costs, which account for around 13% of total costs, rose by nearly 1 percentage point in 2024 to 13.7%.

The proportion of costs attributable to vehicle ownership (tractor units 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 introduction of the EURO VI environmental standard on 1 January 2014 and new mandatory safety equipment. The impact of these increases is diluted in the calculation of ownership costs by the gradual renewal of the vehicle fleet (around one-sixth of the fleet per year). However, the significant rise in interest rates is increasing the financial burden of these vehicle replacements. The maintenance cost index, which includes tyres and vehicle maintenance and repairs, has remained stable at around 8.3% since 2016. Finally, the 'infrastructure' item remains stable in 2024, at 6.4% of total costs.

In regional transport, costs related to driving staff account for a larger share than in long-distance transport and remain stable at 41.4% of the total in 2024. Vehicle ownership, for which the price index has risen by 3.7%, ranks second at 20.6%, ahead of commercial diesel expenditure, which falls by 1.5 percentage points in 2024 to 16.9%. Finally, maintenance and repair costs rise to 7.5% of the total in 2024.

In the coming years, the emergence of new engine types, which are more expensive to purchase, will require appropriate financial support to encourage transport operators to decarbonise their fleets. Furthermore, energy costs must remain at a level that does not deviate too far from overall market costs.

AUTOMOTIVE PRICE INDEXES

In 2024, inflation slows significantly due to a fall in petroleum product prices and a sharp slowdown in food prices. It falls from +4.9% in 2023 to +2% in 2024.

Against this backdrop, car-related items also saw a slowdown in prices, and even a fall in the case of fuel. New car prices rose by 1.5%, compared with +4% the previous year. Prices for spare parts and accessories, as well as maintenance and repairs, have slowed, falling from +7.8% in 2023 to +4.2% in 2024, thanks to the sharp slowdown observed in the spare parts and accessories component (+1.7% in 2024, compared with +6.5% in 2023). The price of maintenance services (labour and supplies used in this work) continues to rise at a steady pace (+5.5%), although this is down on last year (+8%). As for fuel prices, which had rebounded sharply in 2021 and 2022 with the revival of global trade and the war in Ukraine and had stabilised in 2023, are down by 4.7% in 2024.

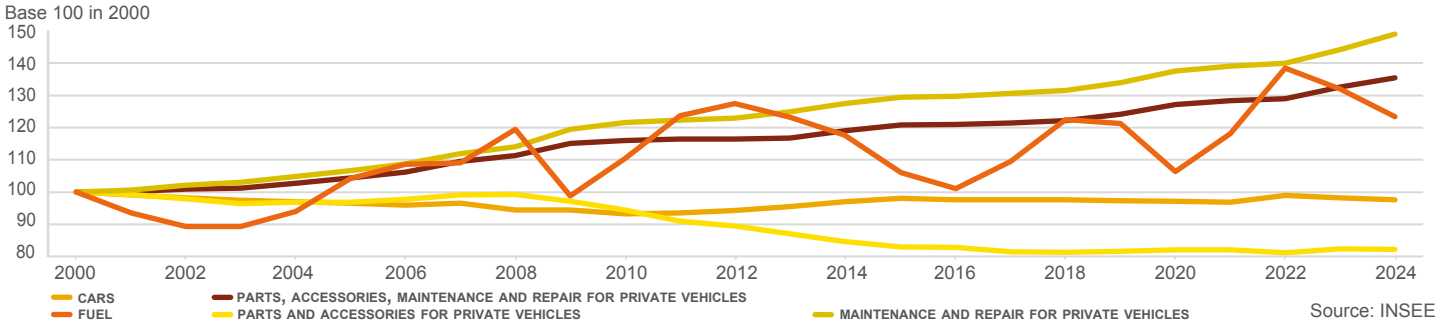
-4.7% **Fall in fuel prices in 2024**

► 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
2019	+1.1%	+0.7%	+2.7%	+1.5%	+2.9%	+0.1%
2020	+0.5%	+0.4%	+2.9%	+0.9%	+3.2%	-11.9%
2021	+1.6%	+1.3%	+2.6%	+1.7%	+2.8%	+13.0%
2022	+5.2%	+7.5%	+5.7%	+3.9%	+5.9%	+23.3%
2023	+4.9%	+4.0%	+7.8%	+6.5%	+8.0%	+0.0%
2024	+2.0%	+1.5%	+4.2%	+1.7%	+5.5%	-4.7%

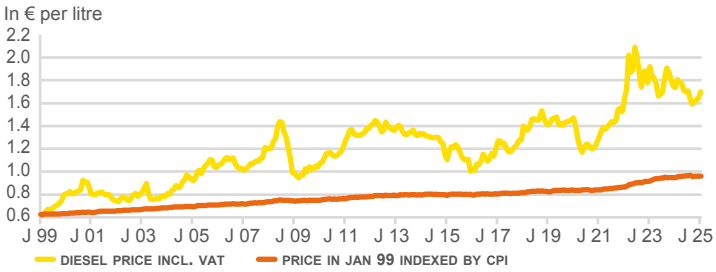
Sources: INSEE, CCFA calculations

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



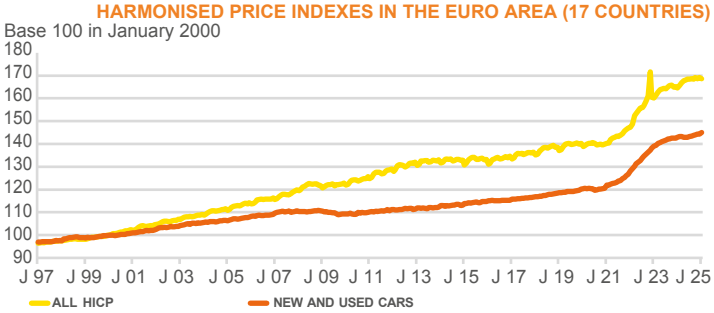
Source: INSEE

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



Sources: MTE/SDES, INSEE, CCFA calculations

HARMONISED PRICE INDEXES IN THE EURO AREA (17 COUNTRIES)



Source: Eurostat

The index of new car prices calculated by INSEE compares the prices of a sample of cars purchased by households with similar technical specifications, so as not to consider price increases resulting from improvements in quality or equipment, nor changes in the sales mix (energy mix, bodywork mix). It considers discounts offered periodically (excluding private sales), as well as the bonus-malus system. The INSEE index rose by 15.4% between 2019 and 2024, whilst the average price of vehicles sold in France (across all buyer categories) increased much more sharply (+34%) due to the growth in SUVs, all-terrain vehicles, the move upmarket and the rise of electric vehicles.

Over the period 1992–2010, the real price of new cars (i.e. adjusted for inflation) fell steadily, driven by ongoing competition and occasional market support measures (bonus/malus scheme, scrappage scheme). Nevertheless, new regulatory requirements regarding emissions reduction and safety have contributed to the rise in new car prices since 2011. The reduction in the eco-bonus and the increase in penalties have also weighed on prices, particularly in 2024.

Overall, in 2024, the rise in new car prices as measured by INSEE (based on household consumption) slowed, falling from +4% to +1.5%. Excluding discounts and the bonus/penalty scheme (list prices), prices across the entire market (including business purchases) nevertheless rose by 2.7% according to AAA Data, compared with +6.6% last year. All engine types saw price increases, except for petrol, which fell by 5%. Plug-in hybrids are the powertrain that saw the sharpest rise in 2024 (+15%), and their share of registrations, although small (10%), is growing. The average price of electric cars sold remains around 17% higher than the average, but in 2019 it was 40% higher.

Between 2000 and 2024, the real index for spare parts and accessories fell from 100 to 82, a decline of 18%. Conversely, the real price index for maintenance and repair services has risen by 49% compared with 2000, due to rising labour costs (wages, skills development, shortage of skilled labour). Finally, fuel prices have risen much more sharply than inflation over the long term, particularly since 2017. The real fuel price index stands at 123 (base 100 in 2000).

In the eurozone, Eurostat calculates a harmonised consumer price index that allows for international comparisons, thanks to a similar methodology across different countries. Since 2000, the general price level in the eurozone has risen by 66%, whilst that for new and used car purchases has risen by only 45%, indicating price pressure linked, as in France, to the intensity of competition and constraints on household purchasing power.

HOUSEHOLD CAR CONSUMPTION

2024 was marked by a slowdown in growth against a backdrop of falling inflation. GDP grew by 1.2%, following +1.4% in 2023. Inflation slowed compared with the previous year, standing at 2.2% on an annual average, compared with 7.0% in 2023. This fall in prices is largely linked to the fall in food prices (+1.3%, compared with +12.2% in 2023) but also to energy prices. Household gross disposable income (GDI) is set to rise by 4.8% in 2024, boosting purchasing power, which is expected to grow by 2.6%, compared with 0.8% in 2023. This allows for a slight acceleration in final household consumption expenditure, which rises by 1.0% in 2024 (after +0.8% in 2023), but the household savings rate continues to rise and stands at a high level of 18.2% of GDI, an increase of 1.2 percentage points compared with 2023.

In 2024, total expenditure on motor vehicles amounts to €162 billion, up 0.5% compared with 2023. This represents a sharp slowdown compared with last year (+5.9%). Vehicle purchases fell slightly by 0.4% in value, to €44.7 billion. Spending on new cars fell by 5.2% (compared with +23.6% last year), l ly due to a sharp drop in volumes (-5.8%) and relatively stable prices (+0.7%). Conversely, spending on used cars accelerated, rising by 11.5%, comprising a 9.6% increase in volume and a 1.7% rise in prices.

Growth in spending on maintenance and repairs has slowed significantly; it stands at €41.4 billion in 2024, representing a rise of 3.1% compared with 8.1% in 2023. Finally, expenditure on 'fuels and lubricants' continues to fall at the same rate as last year (-2.9%), due to a fall in prices (-4.7%), whilst consumption by volume rises by 1.8%. The total stands at €52.7 billion.

7,9 % **Share of car-related expenditure in household consumption expenditure in 2024**

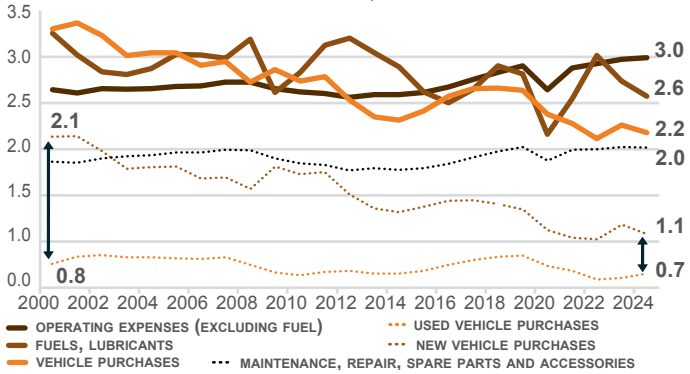
► HOUSEHOLD CONSUMPTION EXPENDITURE ON TRANSPORT (IN EURO BILLION AND SHARE OF ACTUAL NATIONAL HOUSEHOLD CONSUMPTION)

	2000		2010		2019		2022 (1)		2023 (1)		2024 (1)		variation 2024/2023
VEHICLE PURCHASES	**32.9**	**3.3%**	**38.7**	**2.7%**	**44.4**	**2.6%**	**39.2**	**2.1%**	**44.9**	**2.3%**	**44.7**	**2.2%**	**-0.4%**
New and used cars (including tax on registration certificates)	28.8	2.9%	33.5	2.4%	36.9	2.2%	29.8	1.6%	35.4	1.8%	35.5	1.7%	+0.4%
including new cars	21.3	2.1%	24.5	1.7%	22.7	1.3%	18.9	1.0%	23.4	1.2%	22.2	1.1%	-5.2%
including used cars	7.6	0.8%	9.0	0.6%	14.2	0.8%	10.9	0.6%	12.0	0.6%	13.4	0.7%	+11.5%
Caravans, motorcycles, cycles	4.1	0.4%	5.3	0.4%	7.5	0.4%	9.4	0.5%	9.5	0.5%	9.2	0.4%	-3.6%
VEHICLE OPERATION EXPENSES	**58.7**	**5.9%**	**77.1**	**5.4%**	**96.1**	**5.7%**	**110.3**	**5.9%**	**113.4**	**5.7%**	**114.1**	**5.6%**	**+0.7%**
Maintenance, repair, spare parts and accessories	18.5	1.9%	26.1	1.8%	34.0	2.0%	37.2	2.0%	40.2	2.0%	41.4	2.0%	+3.1%
including manufacturing of automotive equipment	11.3	1.1%	17.2	1.2%	23.1	1.4%	24.7	1.3%	27.0	1.4%	28.0	1.4%	+3.8%
including motor vehicle maintenance services	2.4	0.2%	3.1	0.2%	4.0	0.2%	4.5	0.2%	4.9	0.2%	5.1	0.2%	+3.8%
Fuels and lubricants	32.4	3.3%	40.1	2.8%	47.3	2.8%	56.0	3.0%	54.3	2.7%	52.7	2.6%	-2.9%
Tolls, parking, rental, driving schools	7.7	0.8%	10.9	0.8%	14.8	0.9%	17.1	0.9%	18.8	0.9%	20.0	1.0%	+6.0%
MOTOR INSURANCE	**1.0**	**0.1%**	**1.6**	**0.1%**	**2.2**	**0.1%**	**2.7**	**0.1%**	**2.9**	**0.1%**	**3.1**	**0.2%**	**+9.1%**
TOTAL AUTOMOBILE AND MOTORCYCLE-RELATED CONSUMPTION	**92.5**	**9.3%**	**117.5**	**8.3%**	**142.7**	**8.5%**	**152.2**	**8.2%**	**161.1**	**8.1%**	**162.0**	**7.9%**	**+0.5%**
Public transport services	13.6	1.4%	21.7	1.5%	29.0	1.7%	28.6	1.5%	33.3	1.7%	36.1	1.8%	+8.4%
ACTUAL NATIONAL HOUSEHOLD CONSUMPTION	**995**	**100%**	**1,415**	**100%**	**1,682**	**100%**	**1,857.61**	**100%**	**1,985.37**	**100%**	**2,051.82**	**100.0%**	**+3.3%**
NUMBER OF HOUSEHOLDS (Metropolitan France)	24,256		27,227		29,336		30,174		30,460		30,725		+0.9%
Household savings rate	13.3%		15.8%		14.6%		16.9%		17.0%		18.2%		+1.2 point
Automobile consumption per household	3,813		4,314		4,863		5,043		5,290		5,272		-0.3%
Automobile consumption per motorised household	4,748		5,166		5,728		5,933		6,275		6,254		-0.3%

(1) These data are provisional and may be readjusted for three years.
Source: INSEE / Household consumption, 2024 - base 2020

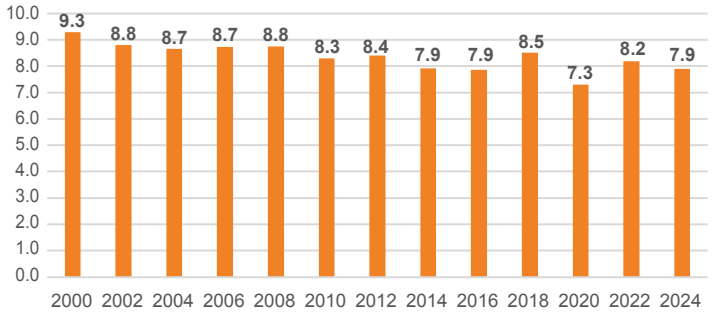
AUTOMOBILE BUDGET COEFFICIENTS

As a % of actual national household consumption



TOTAL AUTOMOBILE EXPENDITURES

As a % of actual national household consumption



Source: INSEE / Household consumption, 2024 - base 2020

According to national accounts data, which are based on different concepts from those used in the Household Budget Survey (see page 60), households spent €162 billion on private transport in 2024, and €36.1 billion on public transport services.

The share of motor vehicle expenditure in total national consumption, known as the 'motor vehicle budget coefficient', stood at around 9% between 1990 and 2009. Then, following the 2009 crisis, the coefficient fluctuated around 8%, a level close to that observed in 2024 (7.9%).

Until 2005, vehicle purchases (new cars, used cars and other vehicles) constituted the largest item of automotive expenditure, accounting for around 3.5% of actual household consumption. Then, from 2006 onwards, the share of vehicle purchases began to decline in favour of vehicle running costs (excluding fuel). These became the largest item of automotive expenditure from 2012 onwards. Since 2019, the decline in the budget share associated with vehicle purchases has been even more pronounced, due to supply shortages following the health crisis, which affected both new and used car purchases. Vehicle purchases will account for just 2.2% of household consumption in 2024, largely due to the contraction in volumes. Furthermore, the gap between the share of expenditure on new cars and that on used cars has narrowed considerably, falling from 1.3 percentage points in 2000 to 0.4 percentage points in 2024, mainly due to the decline in the share of new cars.

Vehicle running costs (excluding fuel) have been rising steadily since 2014 and account for 3% of household expenditure in 2024. Finally, the share of the 'fuel' category has fluctuated significantly over the last twenty years, in line with changes in energy prices. In 2020, it had fallen to 2.2%, then rose to 3% in 2022. Since then, it has been falling again as prices have dropped, amounting to €52.7 billion in 2023.

CAR FINANCING

In 2024, the cumulative volume of new consumer loans rose slightly following the sharp fall in 2023. Interest rates stabilised after the very sharp rise observed between September 2022 and February 2024 (+2.6 percentage points over 18 months) but remained at a high average level of 6.4% for the year. Despite the decline in the car market (-3.3% in new car sales to private individuals), the number of car finance applications rose by 13% in value and 12% in volume in 2024, according to data from the Association of Finance Companies (ASF).

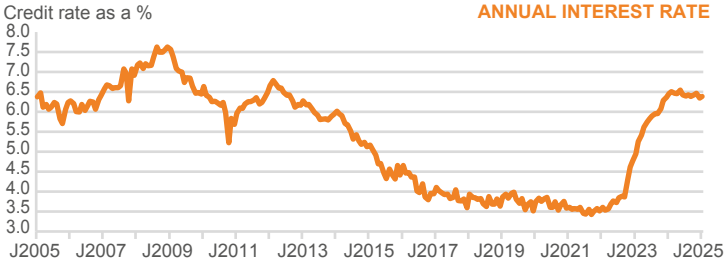
According to data from Kantar's Parc Auto survey, the proportion of households buying a new car on credit can be estimated at around 70%. Nevertheless, within credit purchases, leasing schemes continue to grow (+20% in volume). Leasing with an Option to Purchase (LOA), which dominates the private leasing market, is growing more slowly (+9% in 2024) than Leasing without an Option to Purchase (LSOA) (+67%). As for car loans, they continue to decline (-25%).

In 2024, leasing now accounts for nearly 90% of credit financing (14% in 2010), ahead of special-purpose car loans (10% in 2024, compared with 49% in 2010) and personal loans. In 2024, 50,000 vehicles were financed through the social leasing scheme set up to help low-income households acquire new electric vehicles. Within the leasing sector, LOA dominates by a wide margin (66% of credit purchases), ahead of LSOA, which is growing and now accounts for over 20% of financing applications. With the growth of electric vehicles, whose average unit value is higher than that of a combustion-engine vehicle (by around 20%), the appeal of these leasing options is currently increasing.

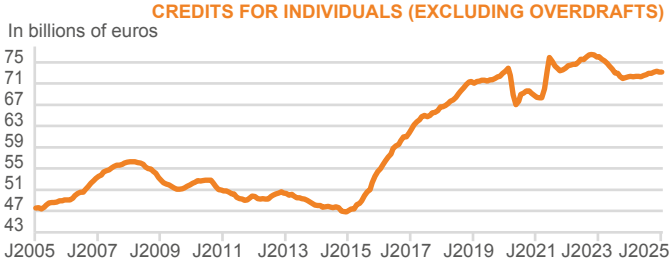
For used cars purchased by households, cash purchase remains the main method of financing. In 2024, 61% of used cars were purchased with a personal deposit, according to Kantar's PARC AUTO survey, a slight decrease compared to 2023. The number of used car loan applications fell slightly in 2024, despite the rise in registrations. This decline is linked to the fall in special-purpose loans, whilst lease-purchase agreements rose sharply (+37% in applications and 28% of loan financing).

Credit financing for businesses' new vehicle fleets (passenger cars, light commercial vehicles and heavy goods vehicles) fell by 6% in 2024. Unlike households, cash payments are very rarely used. Special-purpose loans are virtually non-existent (2%) and leasing arrangements account for 98% of credit financing applications. Businesses favour LSOA, which accounted for 53% of financing applications in 2024, a 5-point decline compared to 2022. Conversely, the share of LOA is increasing (45%), but the number of applications fell by 2% in 2024. However, the average value of LOA financing applications is twice that of LSOA applications, leading to LOA dominating in terms of amounts expressed in euros.

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

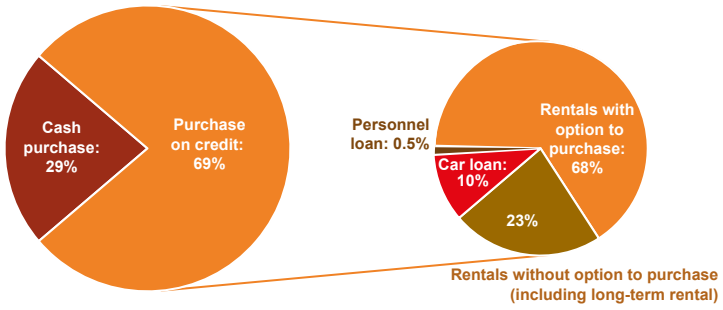


CUMULATIVE AMOUNTS OVER TWELVE MONTHS OF NEW CONSUMER CREDITS FOR INDIVIDUALS (EXCLUDING OVERDRAFTS)



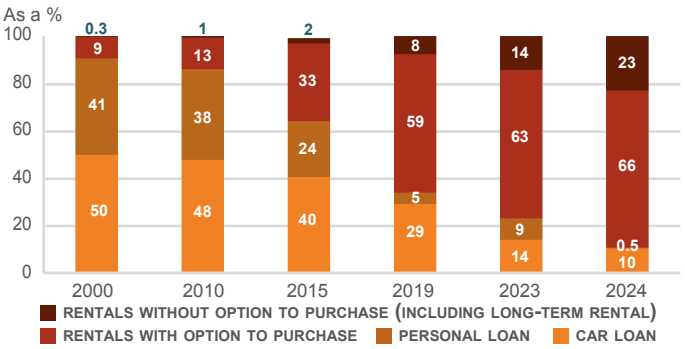
Source: Banque de France

METHOD OF FINANCING THE PURCHASE OF A NEW CAR BY INDIVIDUALS IN 2024



Sources: ASF, CCFA

CHANGES IN CREDIT FINANCING OF NEW CARS PURCHASED



Sources: ASF, CCFA

Buyers of cars, whether new or used, turn to finance if they cannot or do not wish to pay in cash.

They have four financing options available to them:

- Personal or bank loans granted by a bank or credit institution. The borrower is free to use the loan as they see fit.
- Special-purpose car loans or standard car loans. These are granted by finance companies, subsidiaries of manufacturers and importers, or by finance companies independent of manufacturers but subsidiaries of financial or banking groups. They are used for a specific purchase.
- Leasing with an option to purchase (LOA), also known as leasing, hire purchase or finance lease. This is a form of consumer credit that allows the user to have a car at their disposal in return for monthly payments during the lease term, which can be up to eighty-four months, or seven years. The option to purchase may be exercised during the lease or at its expiry.
- Leasing without a purchase option (LSOA) encompasses finance leasing and long-term leasing. These are arrangements where the lessee has no option to become the owner at the end of the contract.

Data from various sources (trade associations, vehicle registration statistics, surveys, etc.) enable an estimate to be made of the use of credit by households purchasing a new car.

89% **Share of leasing in credit financing for new cars purchased by households in France in 2024**

THE SALE AND REPAIR OF CARS AND MOTORCYCLES

In 2024, turnover in the automotive trade (all vehicles) fell by 2.6% in the wake of a decline in sales volume (-3.2%) and a slowdown in new car prices (+1.5% in 2024, following +4% in 2023). Turnover excluding tax in the motor vehicle trade in France amounted to €184.3 billion in 2024, down 2.6% compared with 2023.

Turnover generated by vehicle maintenance and repairs amounts to €31.2 billion excluding tax, up 3.8% compared with 2023. With the rise in the used car market, the increase in the average age of the vehicle fleet and the length of ownership, workshop visits continue to rise (2.6 in 2024, compared with 1.8 in 2015), although they remain below 2019 levels (2.7 on average) due to lower vehicle usage.

-2.6% **Change in pre-tax turnover of the motor vehicle trade in France in 2024**

Retail turnover for automotive equipment is projected to reach €8.2 billion excluding tax in 2024, up 5% compared with 2023.

Finally, retail turnover for fuel is projected to reach €19.8 billion in 2024, down 2.4% compared to 2023. The decline in total road fuel consumption (-0.4% according to UFIP), combined with a fall in prices (-4.7% on average over one year), explains this decline.

Since the 1990s, the automotive distribution sector has undergone a continuous process of consolidation, linked to increased geographical coverage and the development of multi-brand retailing, a trend that continues today.

In 2024, the 100 largest automotive distribution groups generated pre-tax turnover of €71.3 billion, up 6% year-on-year, despite falling volumes and a slowdown in prices. They thus accounted for nearly 78% of the market by value in 2024, up 7 percentage points year-on-year. In terms of volume, they also accounted for over 71% of passenger car sales. The top ten groups, meanwhile, account for 29% of sales by value and 28% by volume. Seven groups now report turnover in excess of €2 billion (compared with four in 2022) and more than twenty groups recorded turnover more than €1 billion, compared with 15 in 2022 and 9 in 2020. The top 10 distributors generated a combined turnover of €26.3 billion, up 3.3% year-on-year.

According to INSEE-Esane data, the operating margin ratio (gross operating surplus / value added at factor cost) for the motor vehicle trade has risen in recent years, from 15% in 2015 to 26% in 2022. The investment rate (tangible investment / value added excluding tax), meanwhile, rose from 11% to 21%. In the maintenance and repair of motor vehicles, these two indicators remained stable at around 22% and 13% in 2021.

► SALES NETWORKS IN FRANCE FOR LIGHT VEHICLES AS OF 1 JANUARY 2025

BRANDS	Primary network
Renault-Dacia (1)	1,143
Alpine	35
Peugeot	423
Citroën	395
Opel	233
DS	178
Fiat (1)	444
Alfa Romeo	156
Lancia	86
Jeep	165
Groupes Renault and Stellantis	**3,258**
Volkswagen (1)	537
Toyota	274
Ford	219
Suzuki	219
Kia	216
Hyundai	204
Nissan	187
Skoda	170
Mercedes-Benz	164
Seat	160
BMW-Mini	157
Audi	145
Mitsubishi	106
Mazda	108
Honda	81
Lexus	45
Volvo	120
Other brands	288
TOTAL	**6,658**

(1) Includes entities intended for professional use.

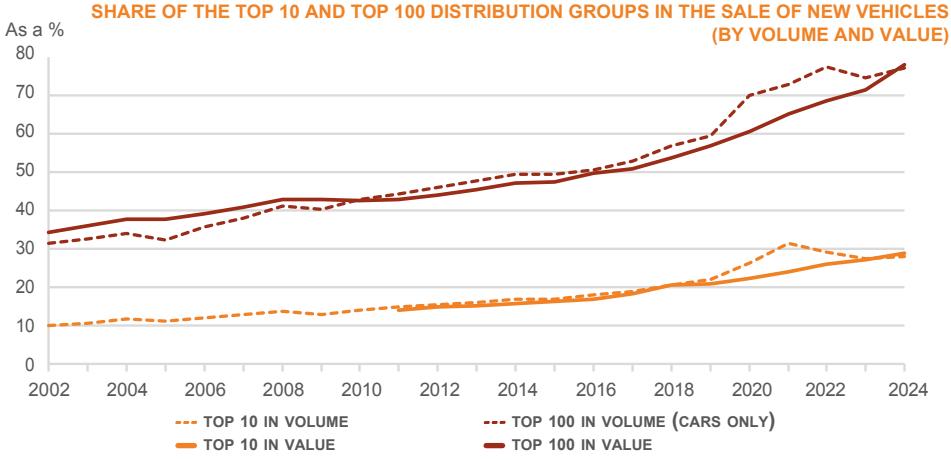
► TURNOVER FROM TRADE AND REPAIR OF AUTOMOBILES AND MOTORCYCLES

(IN BILLIONS OF CURRENT EUROS EXCLUDING VAT)

Activities	2010 (1)	2019	2020	2022	2023 (sd)	2024 (p)	Variation 2024-2023
Sale of motor vehicles	115.9	151.6	136.0	162.3	189.2	184.3	-2.6%
Maintenance and repair of motor vehicles	22.8	24.1	22.7	27.5	30.1	31.2	+3.8%
Retail sale of automotive equipment	5.6	6.3	6.0	7.3	7.8	8.2	+5.0%
Sale and repair of motorcycles	4.4	5.4	5.5	6.7	7.1	6.9	-2.9%
Retail sale of fuels	17.2	18.1	13.7	21.5	20.3	19.8	-2.4%
TOTAL	**165.9**	**205.4**	**183.8**	**225.3**	**254.5**	**250.4**	**+7.1%**

(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 ensure a high standard of quality in sales and after-sales service, car manufacturers' distribution networks rely on selecting dealers and repairers capable of meeting the manufacturers' requirements and delivering customer service. Cooperation between manufacturers, their distributors and their authorised repairers ensure, in addition to maintenance and repair, warranty service, user safety, environmental protection, the availability of spare parts and information on technical developments.

As of 1 January 2025, the primary network, comprising manufacturers' subsidiaries and dealerships, comprises 6,658 sales outlets, out of a total of 16,170 sales outlets in France.

In the automotive repair sector, in addition to the manufacturers' networks (authorised repairers, dealerships and agents, totalling around 13,000 operators), there are also independent networks: MRA (Mécaniciens Réparateurs Automobiles), car centres, quick-fix repair centres and tyre specialists. In 2022, according to ANFA, there were 20,300 MRAs, a figure that has grown significantly over the past nine years, and 4,600 quick-fix car centres or tyre specialists, which have seen slight growth in recent years. These independent networks benefit more than manufacturer networks from the ageing vehicle fleet, as their business is more focused on repairing older vehicles (7–9 years old), which generate more workshop visits. Manufacturer networks, for their part, specialise more in predictive maintenance on newer vehicles or electronic fault diagnosis. According to GIPA, in terms of workshop visit volumes, MRA centres are the leading operators in the market, accounting for 34% of volumes in 2022, followed by manufacturer networks (30%, down from 34% in 2016), car centres (19%, compared with 16% in 2016), tyre specialists (7%) and quick-fix repairers (5%).

CIRCULAR ECONOMY

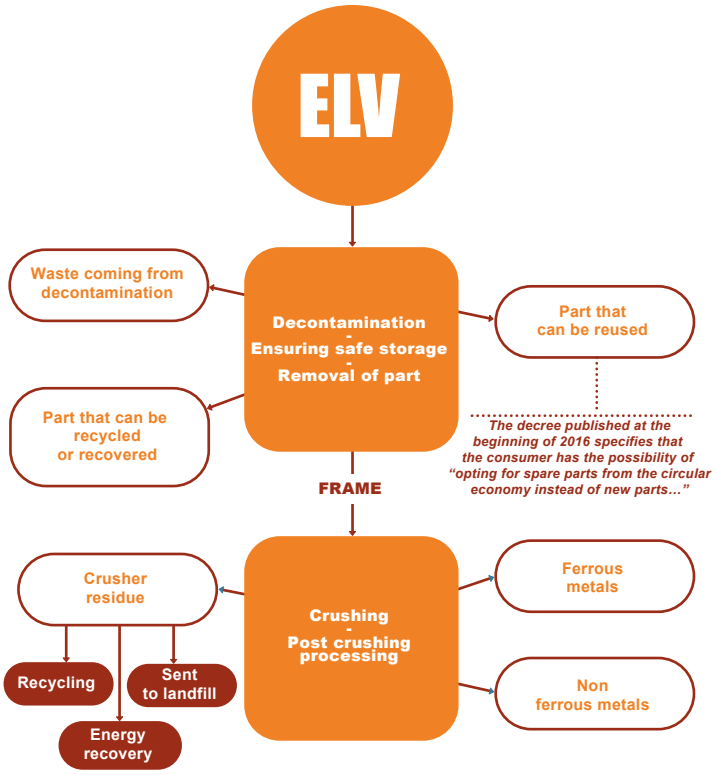
According to ADEME, the circular economy can be defined as an economic system of exchange and production which, at all stages of the life cycle of products (goods and services), aims to increase the efficiency of resource use and reduce the impact on the environment. In the automotive sector, the circular economy concerns the vehicle and its consumables (tyres, oils, batteries, etc.), including during the production phase.

An end-of-life vehicle (ELV) is a vehicle that has reached the end of its useful life and which 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 2022, 1.17 million ELVs were handled by the authorised sector, compared with 1.35 million in 2021. This figure, which had already fallen in 2020 due to the COVID-19 pandemic and lockdown (suspension of ELV centre operations, slump in the new and used car markets, and a reduction in the number of accidents), fell again in 2022 (-13%). The weak demand for new and used vehicles is due to rising vehicle prices and is leading to an ageing vehicle fleet.

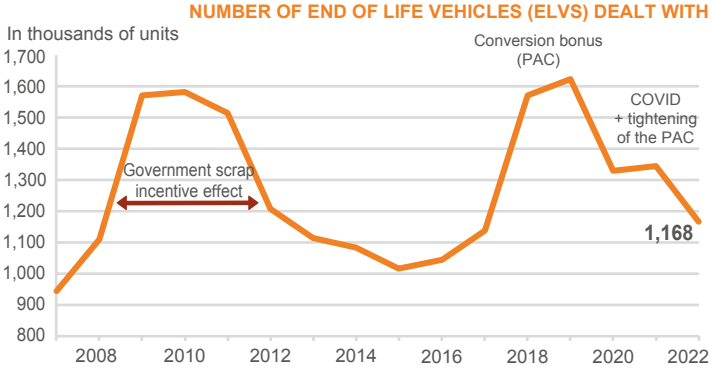
ADEME measures the end-of-life vehicle (ELV) reuse and recovery rate. This ratio is the sum of the reuse and recycling rate and the energy recovery rate. This rate, which stands at 96% in 2022, has risen by 14 percentage points over ten years.

1.17 million **Number of ELVs processed in 2022**

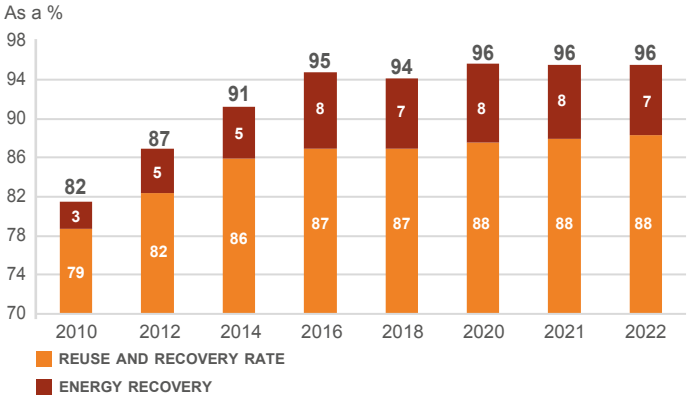
► SIMPLIFIED CHART OF PROCESSING OF AN ELV



NUMBER OF END OF LIFE VEHICLES (ELVS) DEALT WITH



ELV REUSE AND RECOVERY RATE



Source: ADEME

In France, 1.17 million end-of-life vehicles (ELVs) were handled by the sector in 2022 and processed by approximately 1,759 ELV centres. 91% of these ELVs are passenger cars, with an average weight of 1,153 kg in 2022 (974 kg in 2010). The average age of end-of-life vehicles reached 19.8 years in 2022, having risen steadily in recent years (16.8 years in 2013).

An ELV is composed of a wide variety of materials, which makes its recycling complex. It consists of 75% metals (ferrous metals: 70%, non-ferrous metals: 4% and wiring harnesses: 1%); 12% plastic; 4.5% rubber (tyres and other); 3% glass; 2% textiles; and 1% used oils and fluids.

The first stage of processing involves decontamination by removing batteries, used oils and filters, coolants or brake fluids, and air conditioning fluids. Waste volumes are estimated at 34,000 tonnes in 2022, or 29 kg per ELV. 80% is sent for recycling, 9% for energy recovery and 11% is reused (batteries). In 2022, the collection of automotive batteries (almost exclusively lead-acid batteries, used to power a vehicle's starting, lighting or ignition systems) fell by 10%, following a sharp rise in 2021, whilst the volume of such batteries placed on the market is slowing down. Lithium batteries, meanwhile, have seen a sharp increase in the number placed on the market (+22% compared to 2021), driven by the growth of electric and hybrid vehicles and, in some cases, the replacement of lead-acid batteries with lithium batteries to power automotive equipment. The European Commission has proposed a European regulation aimed at establishing a circular economy framework 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 recycling efficiency targets for lithium-ion batteries at 61% by 2031.

The second stage of processing involves dismantling used tyres and parts for resale as second-hand goods or for recycling. Collection within the automotive tyre sector (light and heavy-duty vehicles) totalled 533,104 tonnes in 2023, representing a 0.5% increase compared to 2022. The collection rate stands at 95%. In 2023, 48% of these tyres were destined for energy recovery (e.g. as a substitute fuel in cement works), 38.4% for material recovery, of which just over half for granulation (sports fields, street furniture), 13.6% for reuse (second-hand resale, retreading and the remainder for other recovery methods).

The resale of second-hand spare parts helps to achieve recycling targets and contributes to the economic balance of the automotive sector. Over 100,000 tonnes of parts were removed from end-of-life vehicles (ELVs) for reuse in 2022, equivalent to 85.5 kg per ELV. This market has grown significantly since the Covid crisis, as many new spare parts faced stock shortages and saw their prices rise sharply. The market for reused parts has expanded and now accounts for between 4% and 6% of the repair parts market, depending on the age of the car.

Shredding the vehicle body and extracting materials for recycling and recovery is another stage in ELV processing, but certain consumable parts (oils, batteries, etc.) are already recycled during the vehicle's lifetime. Furthermore, 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 European level, the regulation (Directive 2000/53/EC of 18 September 2000) sets targets for the recovery of end-of-life vehicles (ELVs) of 85% of the average mass of vehicles for recycling and 95% of the average mass for recovery. The Commission proposed a revision of the ELV Regulation on 17 May 2023, introducing new requirements on eco-design and vehicle dismantling, as well as an obligation for manufacturers to take responsibility for the collection and treatment of end-of-life vehicles. This draft revision is expected to be finalised in 2026.

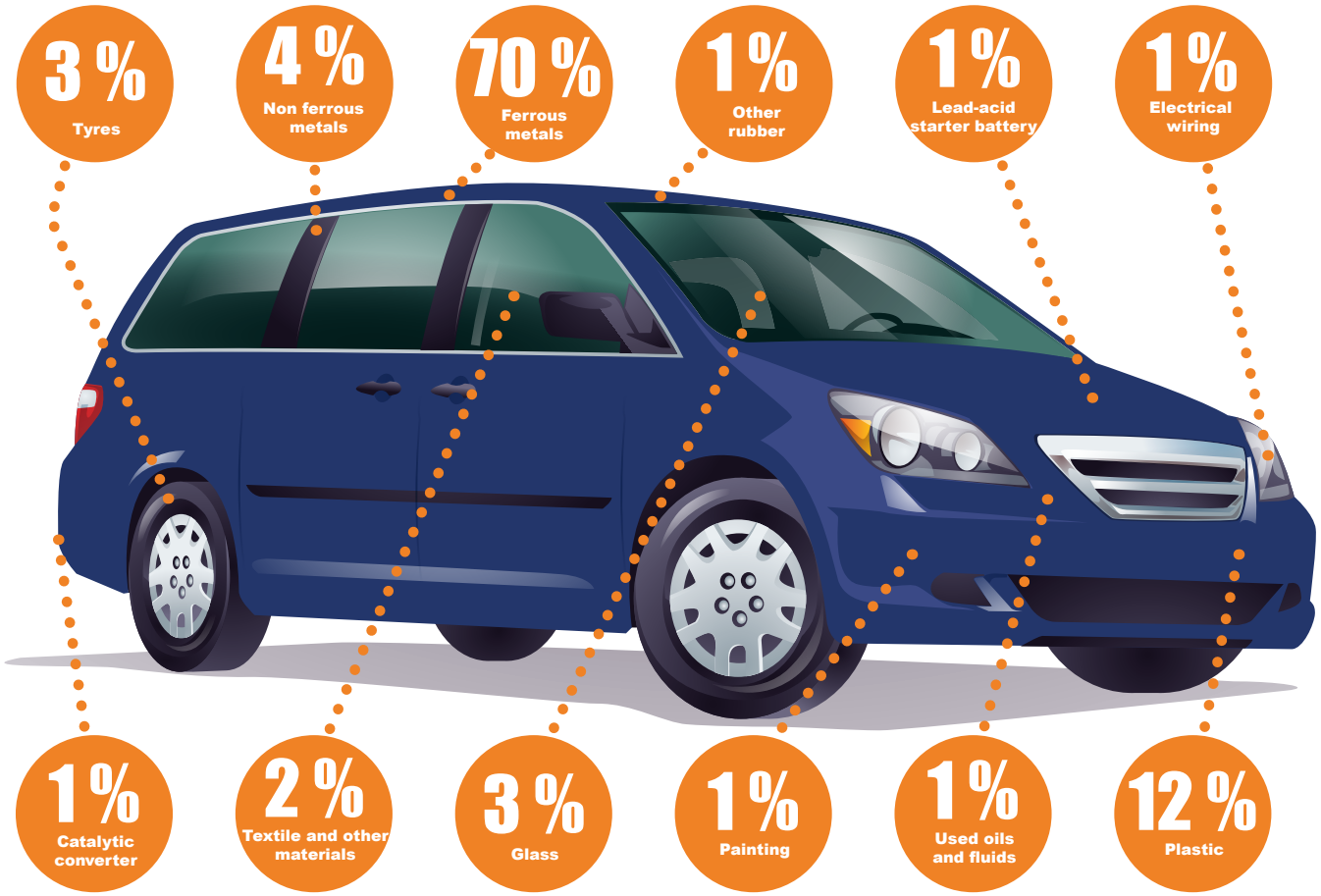
At national level, the regulatory framework is set out in Articles R.543-153 et seq. of the Environment Code. Vehicles are placed on the market by producers (manufacturers and importers) via a network of distributors. At the end of its life, the vehicle must be handed over to an authorised ELV centre, which must take it back free of charge so that it can be processed in accordance with precise specifications, ensuring compliance with health and environmental regulations. The centre is responsible for depolluting the vehicle (removing fluids, oils, fuels, brake fluid, air conditioning refrigerant, batteries and securing pyrotechnic devices) and dismantling parts for resale as second-hand items or for recycling, then sending the resulting carcass to one of the 61 approved shredders. These shred the vehicle to separate the various materials it is made of. These materials are then sorted and can be reused to manufacture other products (recycling). If the components are neither reused nor recycled, they can be used for energy recovery (heat, cogeneration).

The AGEC (Anti-Waste for a Circular Economy) laws of 10 February 2020 and the Climate and Resilience Act of 22 August 2021 provided for the establishment of a comprehensive EPR (Extended Producer Responsibility) scheme for manufacturers of motor vehicles (passenger cars, vans, two- or three-wheeled motor vehicles and motor quadricycles). From 1 January 2024, manufacturers of new vehicles will have to fulfil their extended producer responsibility obligations by transferring them to an eco-organisation or by setting up an individual system approved by the Ministry of the Environment. A decree of 20 November 2023 set out the specifications applicable to these operators and established an obligation to collect and transport, free of charge, end-of-life vehicles (ELVs), including those that have been abandoned, 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 option to choose, for certain categories of spare parts, parts from the circular economy instead of new parts. The Decree of 30 May 2016 specifies that parts from the circular economy are defined as components and parts sold by authorised ELV centres, or components and parts reconditioned in accordance with the manufacturer's specifications and sold under the designation 'standard exchange' (Decree of 4 October 1978).

19.8 years **Average age of ELVs processed in 2022**

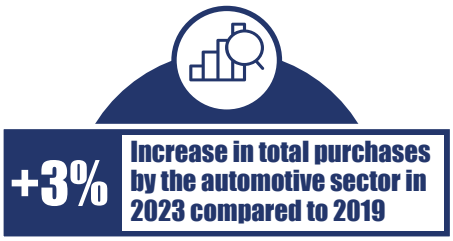
► **COMPOSITION OF AN END OF LIFE VEHICLE IN 2022**



Source: ADEME

Under the AGEC Act, Renault and Stellantis have opted to adopt individual systems for managing their end-of-life vehicles (ELVs). Renault relies on Indra Automobile Recycling via its subsidiary 'The Future is NEUTRAL', which is entirely dedicated to the circular economy, whilst Stellantis relies on Valorauto, a joint venture established with Galloo. Car manufacturers have been integrating the circular economy into their development plans for many years. Within the Renault Group, the Refactory in Flins is rolling out four areas of activity in support of the circular economy: reconditioning used vehicles, repairing heavily damaged vehicles, reconditioning batteries for use as energy storage, and recycling end-of-life vehicles and batteries. The creation of The Future is NEUTRAL by Renault in 2022 aims to bring together all the group's expertise within a unit dedicated to the circular economy, to offer closed-loop recycling solutions at every stage of a vehicle's life cycle (manufacture, use and end-of-life). For its part, Stellantis has a Business Unit dedicated to the circular economy and, in November 2023, inaugurated its first circular economy hub, SUSTAINera, at the Mirafiori site in Italy. It houses activities involving the remanufacturing of engines, gearboxes and electric batteries, as well as the reconditioning and dismantling of vehicles. Finally, Renault Trucks, which already offers the refurbishment of used vehicles at the Used Trucks Factory in Bourg-en-Bresse and remanufacturing at the Limoges plant, opened the Used Parts Factory in Vénissieux in September 2022, designed for the dismantling of end-of-life trucks and the reuse of their parts for future sale.

AUTOMOTIVE INDUSTRY PRODUCTION AND ITS ECONOMIC IMPACT



Production in the automotive sector continues to grow in 2023, for the third consecutive year following the sharp decline in 2020. It stands at €86.8 billion, an increase of 11% compared to 2022. It now exceeds 2019 production levels by 3%. Total purchases in the sector have followed the trend in production and have risen by 12% compared to 2022, reaching €72.6 billion.

The Value Added (VA) of the automotive sector also rose in 2023 to €14.2 billion, up 9% on the previous year and 5% on 2019. Gross Operating Surplus (GOS) also rose in 2023 for the third consecutive year, reaching €6.9 billion, 25% higher than its 2019 level. The margin ratio (EBITDA/VA), which had fluctuated around 40% since 2015 and had fallen to 35% in 2020, rose sharply in 2021 and reached 48.2% in 2023.

Gross Fixed Capital Formation (GFCF), necessary for the transformation of the sector's activities in the context of the energy transition (factories, R&D), rose sharply in 2023 (+16%) to €5.9 billion. The investment rate (GFCF/VA), which had fallen to 37.3% in 2021 following the COVID crisis, continues to recover, reaching 41.3% in 2023. Although this rate remains below pre-crisis levels, it is beginning to approach them.

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

		2015	2019	2020	2022	2023 (1)
PURCHASES FROM OTHER BRANCHES	%	**49.6**	**47.4**	**45.3**	**44.4**	**45.4**
Electrical, electronic, computer equipment and machinery	%	10.5	10.7	10.3	10.1	10.3
Manufacture of computer, electronic and optical products	%	2.7	2.8	2.9	2.8	2.8
Manufacture of electrical equipment	%	2.7	2.7	2.4	2.6	2.7
Manufacture of machinery and equipment not included elsewhere	%	5.1	5.3	5.0	4.8	4.9
Other industries (including Coking and refining)	%	**18.9**	**17.4**	**16.5**	**16.5**	**16.9**
Metallurgy and manufacture of metal products	%	6.5	6.1	5.5	5.4	5.8
Manufacture of rubber, plastics and mineral products	%	7.5	6.8	6.5	6.3	6.4
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	0.9	1.0
Manufacture of textiles, clothing, leather and footwear industries	%	1.3	1.1	1.2	1.1	1.2
Woodworking, paper and printing industries	%	0.6	0.6	0.5	0.5	0.5
Mining, energy, water	%	**1.4**	**1.3**	**1.5**	**1.4**	**1.5**
Electricity, gas, steam and air conditioning	%	0.8	0.8	1.0	0.9	1.0
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**	**0.7**	**0.7**
Transport and storage	%	**2.6**	**2.5**	**2.3**	**2.0**	**2.2**
Information and communication	%	**1.8**	**2.0**	**2.0**	**2.0**	**1.9**
Financial and insurance activities	%	**0.9**	**0.8**	**0.9**	**0.8**	**0.8**
Real estate activities	%	**1.1**	**1.0**	**1.0**	**0.8**	**0.9**
Business support	%	**10.1**	**9.4**	**8.9**	**8.8**	**9.0**
Legal, accounting, control and technical analysis, …	%	5.3	5.0	4.8	4.6	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	3.0	3.1
Administrative and service activities support	%	0.0	0.0	0.0	0.0	0.0
Other tertiary sector	%	**1.2**	**1.2**	**0.9**	**1.0**	**1.1**
All purchases from the tertiary sector	%	**18.6**	**17.7**	**16.8**	**16.2**	**16.6**
PURCHASES FROM THE BRANCH	%	**50.4**	**52.6**	**54.7**	**55.6**	**54.6**
Production of the branch at basic prices	billions of current €	**67.1**	**84.1**	**63.9**	**77.9**	**86.8**
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**	**64.9**	**72.6**
As a percentage of production at basic prices	%	80.8	84.0	83.6	83.2	83.6
Value added from the branch	billions of current €	**12.9**	**13.5**	**10.5**	**13.1**	**14.2**
As a percentage of production at basic prices	%	19.2	16.0	16.4	16.8	16.4
Gross operating surplus (GOS)	billions of current €	**5.1**	**5.5**	**3.6**	**5.9**	**6.9**
As a percentage of value added (Margin rate)	%	39.7	40.7	34.7	45.5	48.2

(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 table of intermediate inputs (TEI) describes, for each industry, their intermediate consumption of various products. As a reminder, an industry comprises homogeneous production units, i.e. those producing the same product or service (the same item in the classification of economic activities). Conversely, the sector groups statistical units according to their main activity, and these units may manufacture products classified under different items in the classification.

According to the TEI, 54% of the automotive sector's total purchases – which account for more than three-quarters of its production – are made within the sector itself, a percentage that has been rising steadily in recent years.

Purchases from machinery and equipment manufacturers (excluding electrical, electronic and IT products) account for 5% of total purchases, which is the same as purchases from manufacturers of electrical equipment, IT and electronic products.

Purchases from 'other industries' account for 17% of total purchases, with the metalworking industry and the manufacture of rubber, plastic and mineral products remaining the leading suppliers (12.3% of total purchases, down two percentage points compared with 2016).

Finally, purchases from the service sector account for around 17% of total purchases, a slight increase in 2023, with 9% of this share going to business support activities.

EQUIPMENT MANUFACTURERS AND SUPPLIERS TO THE AUTOMOTIVE INDUSTRY

Car manufacturing is a key industry for its suppliers and for the French economy. It brings together a variety of players of different sizes, specialisations and ranks. It drives the sector of equipment manufacturers and other suppliers, such as plastics, industrial rubber, foundries, industrial metal services, the service sector (engineering, IT), as well as new players linked to the energy transition (power electronics, batteries, recycling, retrofitting, etc.). The automotive manufacturing industry and all its suppliers together form the automotive sector.

The upstream segment of the sector comprises light vehicle manufacturers, Tier 1 equipment manufacturers and suppliers, as well as numerous subcontractors from a wide range of sectors (mechanical engineering, plastics, rubber, electronics, services); it also includes commercial vehicle manufacturers and bodybuilders. It employs 329,000 people in France and generates added value of €31.2 billion, two-thirds of which is generated by the core automotive construction and equipment manufacturing sector (INSEE, 2023 Sector Survey).

In recent years, facing international competition, the sector has lost 40% of its jobs between 2006 and 2023, with varying impacts across regions and among suppliers. The energy transition is also having an impact on employment, both in terms of declining volumes and changes to the structure of jobs and skills. Sub-sectors linked to internal combustion engines and traditional activities (mechanics) will be more severely affected in terms of employment, to the benefit of the IT, electronics and chemical (batteries) sectors, as well as new activities related to recycling and the circular economy.

A major client

The French automotive industry is one of the leading industrial customers for many economic sectors

► WORKFORCE IN THE AUTOMOTIVE SECTOR WITHIN COMPANIES OPERATING IN THE INDUSTRY, BY SECTOR OF ACTIVITY

Sector	Number of employees working in the automotive sector	Share of each sector in the total automotive workforce (as a %)	Proportion of the automotive workforce in the total workforce (as a %)
Industry	**261,500**	**79.6**	**68.5**
Automotive manufacturing	87,400	26.6	99.2
Manufacture of vehicle bodies and automotive equipment	75,900	23.1	91.9
Metallurgy and manufacture of metal products	36,100	11.0	49.2
Manufacture and retreading of tyres	8,800	2.7	45.3
Other industrial sectors	53,200	16.2	45.1
Service sector	**67,000**	**20.4**	**47.4**
Engineering, technical design	15,600	4.7	45.0
IT services	12,600	3.8	28.1
Wholesale trade in automotive equipment	10,200	3.1	93.1
Other service sectors	28,600	8.7	56.3
Total	**328,600**	**100.0**	**62.8**

► NUMBER OF EMPLOYEES AND VALUE ADDED BY SEGMENT OF THE AUTOMOTIVE INDUSTRY

Business segment	Number of employees working in the automotive sector	Added value in the automotive sector (in billions of euros)
Automotive manufacturing	84,620	10.3
Manufacture of automotive components (bumpers, tyres, dashboards, etc.)	123,210	10.9
Manufacture of intermediate goods (foundry products, coatings, fasteners, etc.)	38,850	3.1
Manufacture of capital goods (machine tools, assembly lines, etc.)	7,260	0.6
Intra-industry trade	21,750	1.8
Engineering, design, R&D	19,850	1.4
Transport and logistics	11,320	0.8
Car mobility services	4,020	1.4
Other (industrial services, vehicle conversion and refurbishment, etc.)	17,670	0.9

Source: INSEE, 2023 survey of the automotive vehicle design and manufacturing sector

According to a study by the Directorate-General for Enterprise published in 2024, the core of the sector (manufacturing, bodywork, equipment) accounts for 47% of companies and 55% of the sector's workforce, compared with 53% and 45% for subcontractors (peripheral activities). The core accounts for 70% of the turnover of products in the automotive value chain, with the periphery accounting for the remaining 30%. The study shows that 42% of suppliers other than equipment manufacturers are heavily dependent on the sector, with more than 50% of their turnover coming from the automotive sector; 22% even generated more than 90% of their turnover in the automotive sector. According to the INSEE study published in 2025, 80% of automotive sector employees work in industry, with the remaining 20% in the service sector. The peripheral sectors with companies heavily involved in the automotive industry are metallurgy and the manufacture of metal products (49% of the workforce involved), the manufacture and retreading of tyres (45%), with other industrial sectors including the manufacture of non-metallic mineral products, machinery and equipment, and textiles. As for service activities, the involvement of their employees in the automotive sector is also significant (93% in the wholesale trade of automotive equipment, 45% in engineering, 28% in IT activities).

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

According to data from the FIEV (Federation of Vehicle Equipment Industries), the workforce of equipment manufacturers stood at 58,042 employees as at 31 December 2024, representing a 3.4% decline compared with 2023, on a like-for-like basis (the new scope includes 239 companies instead of 200 in previous years). Turnover fell in 2024, following three years of growth, and stood at €17 billion in 2024 (under the new scope). The share of turnover generated by exports remained stable at 56%. Equipment manufacturers target two types of market: the original equipment market, where components are supplied to assembly lines, and the aftermarket or replacement parts market. The share of turnover generated by the original equipment market in France accounted for 40% of the total in 2021, rising to over 80% when exports are included. The outsourcing process has led to even greater reliance on suppliers, whose services account for a high and growing proportion of the cost of manufacturing a vehicle (around 85% according to the FIEV). However, a process of re-in-sourcing certain activities is now emerging.

The French automotive industry continues to rely on its industrial base. It accounts for significant shares of the market for technical components made from plastics, industrial rubber, foundry work, and industrial metal services (cutting, stamping, industrial mechanics, bar turning, forging, die-forging and metal coatings), to which are added purchases from the steel industry (25% of tonnage supplied to the automotive industry), the chemical industry (10% for all transport materials), and energy producers. Nearly a fifth of the plastics and electronic equipment sectors and 10% of the domestic market for mechanical engineering relate to the automotive industry. In the case of forging and foundry work, this share stands at around 50%, and the figure rises to 70% in the polymers and rubber sector.

Today, the sector remains heavily reliant on the production of combustion-engine vehicles. The energy transition therefore has significant implications for the sector as a whole and will have very different impacts depending on the sub-sectors in question. A study by Alix Partners / PFA (November 2021) identified three profiles of sub-sectors based on their exposure to change: a group of at-risk sub-sectors comprising traditional activities and those linked to the combustion engine (bar turning, stamping, foundry, forging, etc.), an intermediate group (rubber, plastics, textiles, etc.), which will be less affected, and a growth group (electronics, ePowertrain), with the opportunity to create new value chains and therefore jobs (battery chemistry, charging infrastructure, etc.). These developments will also depend on the intensity of competition from already mature non-European players (China).

EMPLOYMENT

In the broadest sense, 2.4 million people had their jobs secured by the automotive sector in 2024, representing over 8% of the employed workforce.

Strictly speaking, the automotive industry employs around 210,000 people, representing 7% of salaried employment across the entire industrial sector (including extractive industries, food industries and industrial firms), a figure that has been steadily declining for several years.

► JOBS DIRECTLY OR INDIRECTLY RELATED TO THE AUTOMOTIVE INDUSTRY IN 2024

(IN THOUSANDS OF PEOPLE)

	2024
Production activities	**407**
Total raw materials and services	**200**
Manufacturing and energy industry	110
Services	90
Automotive industry	**207**
Automotive construction	105
Equipment, accessories	80
Bodywork, trailers, caravans	22
Cars use	**597**
Car sales, repairs, automotive equipment sales, MOT testing, short- and long-term hire, vehicle dismantlers and recyclers, mobility services, driving schools	476
Insurance, surveyors, credit, etc.	85
Others (self-employed, etc.)	29
Sports, press, publishing, miscellaneous	8
Transport	**1,390**
Road transport of goods and passengers (for others and own account), related services	1,241
Police, health, education, administration (non-market services)	30
Construction, road maintenance and related activities	119
Total jobs induced by the automobile	**2 394**

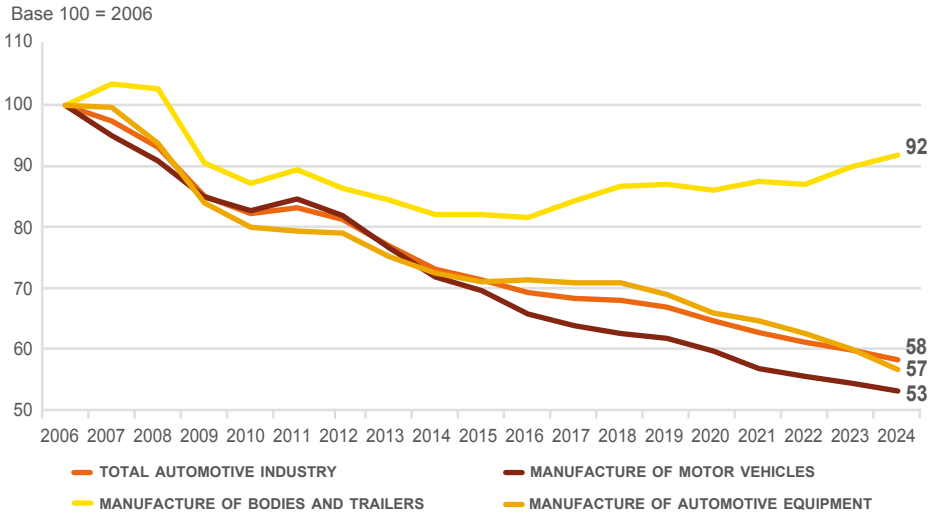
Sources: CCFA, DGE, INSEE, SDES, FNTP, URF, ANFA, Mobilians

From the early 2000s onwards, France's lack of competitiveness weighed heavily on automotive industrial activities (across all sectors), including upstream activities. This led to a decline in the workforce well before the 2009 crisis. During the crisis, public policies to support business activity and companies helped to limit the crisis's impact on employment. In the following decade, economic policy measures to en s for all stakeholders helped to improve productivity. However, they failed to reduce the competitiveness gap with other European countries – which notably captured production of B-segment vehicles – or to halt the downward trend in workforce numbers. In 2020, the health crisis affected business activity, but its impact on employment was limited by the support mechanisms put in place by the government across the various sectors linked to the automotive industry. Since then, employment has remained under pressure from external competition, particularly from China, and continues to decline.

Added to this trend are now the effects of the green transition on employment, with the creation of new roles (electric motors, recycling, etc.), though this will not offset the decline in labour-intensive activities related to internal combustion engines.

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

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 own production and its purchases from other sectors, whether industrial or service-based (including temporary work), accounting for around 17% of total employment linked to the automotive sector. The number of temporary workers involved, in full-time equivalent (FTE) terms, averaged around 21,000 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 to 18,700 and rose again to 27,000 in 2023.

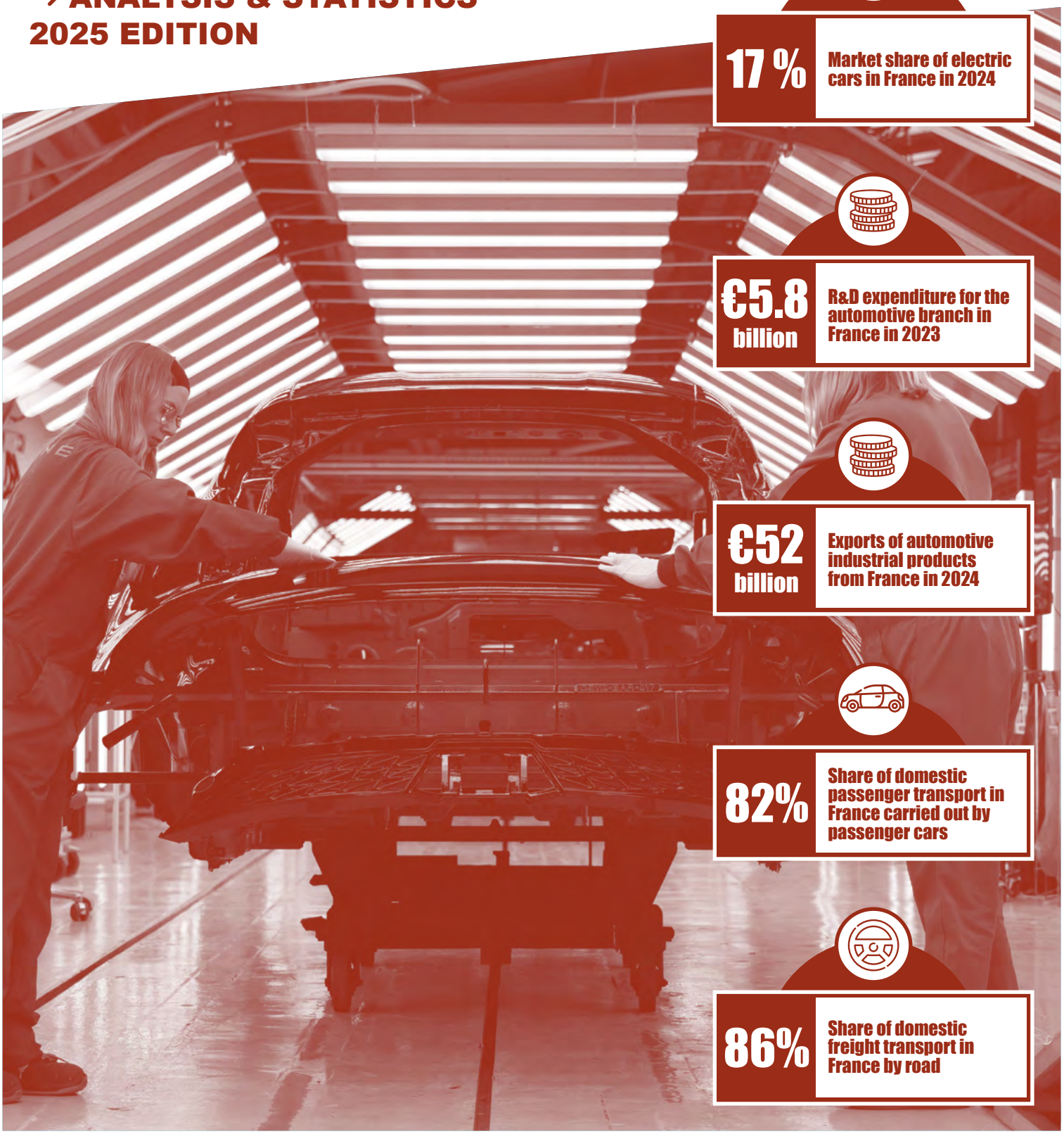
As regards vehicle use, the sectors involved are by nature less sensitive to fluctuations, which results in a slow and steady increase in employment, linked in particular to the slight growth of an ageing vehicle fleet. Car usage accounts for around 600,000 jobs (a quarter of the total workforce), relating in particular to vehicle-related services (sales, repairs, automotive equipment trade, hire, etc.), fuels and recycling (oils, scrapyards, etc.), as well as mobility services and driving instruction. These figures include both employees and self-employed individuals (or the self-employed).

Finally, road transport (passenger and freight) and its infrastructure employed nearly 1.4 million people, representing more than half of total employment linked to the automotive sector. Thanks to the slight recovery in passenger road transport following the COVID crisis and the rebound in freight transport, employment grew between 2021 and 2024. On the infrastructure side, the civil engineering sector saw a decline in employment in 2023, but this rebounded slightly in 2024.

THE FRENCH AUTOMOTIVE INDUSTRY

CCFA

→ ANALYSIS & STATISTICS
2025 EDITION



7.9 million — Vehicles produced by the Stellantis and Renault groups worldwide in 2024

17 % — Market share of electric cars in France in 2024

€5.8 billion — R&D expenditure for the automotive branch in France in 2023

€52 billion — Exports of automotive industrial products from France in 2024

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

86% — Share of domestic freight transport in France by road

GLOBAL 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	2019	2020	2021	2022	2023	2024
EUROPE	17,407,047	17,330,380	18,721,384	14,556,174	13,852,281	13,727,841	15,449,968	14,762,877
Western Europe	14,778,879	12,110,446	11,678,070	8,636,308	8,009,637	8,546,733	9,551,181	8,819,600
Germany	5,131,918	5,552,409	4,663,749	3,515,488	3,096,165	3,480,357	4,109,371	4,069,222
Belgium	912,233	528,996	247,020	237,057	224,180	243,293	285,159	201,561
Spain	2,366,359	1,913,513	2,248,291	1,800,664	1,662,174	1,787,197	1,907,072	1,918,244
France	2,879,810	1,924,171	1,662,963	927,344	918,825	1,010,466	1,026,693	910,243
Italy	1,422,284	573,169	542,472	451,718	443,819	473,194	541,953	309,758
The Netherlands	215,085	48,025	176,113	127,058	107,021	101,670	123,379	7,403
Portugal	178,509	114,563	282,142	211,281	229,221	256,018	243,205	260,930
United Kingdom	1,641,452	1,270,444	1,303,135	920,928	859,575	775,014	905,117	779,584
Sweden	259,959	177,084	279,000	249,000	258,023	238,955	276,750	268,487
Central and Eastern Europe	2,330,692	4,616,540	6,060,672	5,064,823	5,059,808	4,370,219	4,946,120	5,038,764
Turkey	297,476	603,394	982,642	855,043	782,835	810,889	952,667	904,513
AMERICA	10,022,089	8,228,067	7,004,767	4,967,015	4,491,915	4,784,773	5,142,976	4,758,103
USMCA	8,371,806	5,084,330	4,369,893	3,219,558	2,559,194	2,650,980	3,021,424	2,597,685
Canada	1,550,500	967,077	461,370	327,681	288,235	289,371	376,588	217,344
USA	5,542,217	2,731,105	2,511,711	1,924,398	1,562,717	1,703,608	1,741,083	1,432,615
Mexico	1,279,089	1,386,148	1,396,812	967,479	708,242	658,001	903,753	947,726
South America	1,650,283	3,143,737	2,634,874	1,747,457	1,932,721	2,133,793	2,121,552	2,160,418
Argentina	238,921	508,401	108,364	93,001	184,106	257,505	304,773	241,620
Brazil (1)	1,351,998	2,584,690	2,448,490	1,607,175	1,707,851	1,824,833	1,782,079	1,895,020
ASIA-OCEANIA	13,573,073	32,408,358	40,650,626	35,822,949	38,188,956	42,324,552	46,589,829	47,260,914
China	605,000	13,897,083	21,389,833	19,994,081	21,444,743	23,836,083	26,123,757	27,476,886
South Korea	2,602,008	3,866,206	3,612,587	3,211,706	3,162,727	3,438,355	3,908,747	3,849,326
India	517,957	2,831,542	3,629,008	2,836,534	3,631,095	4,439,144	4,783,628	4,991,413
Japan	8,359,434	8,310,362	8,329,130	6,960,411	6,619,245	6,566,356	7,767,058	7,139,188
AFRICA	213,444	356,872	795,720	562,477	582,814	716,195	810,222	892,851
South Africa	230,577	295,394	348,665	238,216	239,267	309,423	336,012	350,384
TOTAL	41,215,653	58,323,677	67,172,497	55,908,615	57,115,966	61,553,361	67,992,995	67,674,745

► COMMERCIAL VEHICLES (in units)

	2000	2010	2019	2020	2021	2022	2023	2024
EUROPE	2,783,468	2,529,925	2,851,062	2,395,787	2,528,595	2,504,491	2,666,443	2,473,987
Western Europe	2,326,653	1,686,875	1,941,872	1,573,402	1,617,815	1,551,707	1,608,793	1,423,097
Germany	394,697	353,576	283,567	227,082	212,527	197,463	nd	nd
Belgium	121,061	26,306	38,777	30,236	36,858	42,180	46,944	38,805
Spain	666,515	474,387	574,341	467,521	435,959	432,239	544,171	458,260
France	468,551	305,250	509,552	388,653	433,401	372,707	478,386	447,458
Italy	316,031	265,017	372,819	325,339	353,424	325,229	331,489	281,309
Netherlands	52,234	46,107	N/A	N/A	N/A	N/A	N/A	N/A
Portugal	68,215	44,166	63,546	52,955	60,733	66,386	75,030	71,616
United Kingdom	172,442	123,019	78,270	66,116	72,913	101,600	120,873	125,649
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	430,588	379,550	417,475	411,025	541,924	590,107
Turkey	133,471	491,163	478,602	442,835	493,305	541,759	515,726	460,783
AMERICA	9,761,798	8,119,880	13,155,634	10,725,912	11,698,920	12,968,763	14,022,139	14,429,318
USMCA	9,325,214	7,069,234	12,452,713	10,154,846	10,907,871	12,144,439	13,173,438	13,509,792
Canada	1,411,136	1,101,112	1,455,215	1,048,446	826,767	943,989	1,177,170	1,125,303
USA	7,257,640	5,011,988	8,381,173	6,896,628	7,594,488	8,349,350	8,898,057	9,129,573
Mexico	656,438	956,134	2,616,325	2,209,772	2,486,616	2,851,100	3,098,211	3,254,916
South America	436,584	1,050,646	702,921	571,066	791,049	824,324	848,701	919,526
Argentina	100,711	208,139	206,423	164,186	250,647	279,388	305,942	264,951
Brazil (1)	329,519	797,038	496,498	406,880	540,402	544,936	542,759	654,575
ASIA-OCEANIA	4,497,938	8,600,629	8,683,215	8,453,600	8,579,844	7,696,666	8,429,893	7,646,935
China	1,464,000	4,367,678	4,360,817	5,231,161	4,676,969	3,184,532	4,037,209	3,804,706
South Korea	512,990	405,535	338,027	295,068	299,677	318,694	334,850	277,926
India	283,403	725,531	895,358	545,285	768,017	1,018,098	1,068,515	1,023,278
Japan	1,781,362	1,318,558	1,355,377	1,107,532	1,217,663	1,269,183	1,231,480	1,095,493
AFRICA	115,305	158,204	317,931	237,524	324,488	307,331	360,421	296,657
South Africa	126,787	176,655	283,256	208,997	259,820	246,466	296,350	249,371
TOTAL	17,158,509	19,408,638	25,007,842	21,812,823	23,131,847	23,477,251	25,478,896	24,846,898

(1) From 2010, Brazilian production is excluding CKD.
Sources: OICA, CCFA

REGISTRATIONS

► NEW PASSENGER CAR REGISTRATIONS BY COUNTRY (IN UNITS)

	2000	2010	2019	2020	2021	2022	2023	2024
EUROPE	17,276,982	16,499,863	17,948,525	14,176,858	14,016,068	12,637,480	14,998,986	15,643,572
Western Europe (1)	14,725,982	12,984,549	14,292,164	10,807,689	10,599,994	10,163,473	11,576,748	11,557,788
Germany	3,378,343	2,916,259	3,607,258	2,917,678	2,622,132	2,651,357	2,844,609	2,817,331
Belgium	515,204	547,340	550,008	431,491	383,123	366,333	476,674	448,277
Spain	1,381,515	982,015	1,258,251	851,222	859,480	813,376	949,362	1,016,885
France	2,133,884	2,251,669	2,214,280	1,650,118	1,659,005	1,529,035	1,774,723	1,718,412
Italy	2,415,600	1,961,580	1,916,949	1,381,753	1,458,030	1,316,919	1,567,151	1,559,229
Netherlands	597,640	482,531	446,056	355,598	322,323	312,497	369,631	381,227
United Kingdom	2,221,670	2,030,846	2,311,140	1,631,064	1,647,181	1,614,063	1,903,054	1,952,778
Central and Eastern Europe (2) and Turkey	2,551,000	3,515,314	3,656,361	3,369,169	3,416,074	2,474,007	3,422,238	4,085,784
Poland	-	315,855	555,598	428,347	446,647	419,749	475,032	551,568
Russia	-	1,912,794	1,567,743	1,433,956	1,483,444	629,923	1,049,968	1,550,249
Turkey	456,696	509,784	387,256	610,109	561,853	592,660	967,341	980,341
AMERICA	-	11,131,614	9,615,025	6,863,586	7,022,914	6,551,141	6,938,637	7,079,750
Canada	849,132	694,349	496,846	318,750	320,605	258,483	255,642	254,195
USA	8,846,625	5,635,432	4,719,710	3,401,838	3,350,050	2,858,575	3,116,647	2,984,039
Mexico	603,010	503,748	763,793	532,433	520,112	486,962	598,215	635,900
Argentina	224,950	522,591	333,183	232,112	240,671	260,822	266,541	274,958
Brazil	1,188,818	2,856,540	2,262,073	1,615,942	1,558,467	1,576,662	1,721,400	1,948,681
ASIA/OCEANIA/MIDDLE EAST	-	27,269,324	36,356,750	33,036,574	35,403,825	38,763,028	42,727,415	44,043,162
Australia	-	827,407	799,263	676,804	753,256	777,688	890,823	898,950
China	-	13,757,794	21,472,091	20,177,731	21,518,324	23,563,287	26,062,824	27,562,989
South Korea	1,057,620	1,237,482	1,497,035	1,618,333	1,468,873	1,420,486	1,489,363	1,439,773
India	-	2,387,197	2,962,115	2,433,473	3,082,279	3,792,444	4,101,600	4,274,793
Indonesia	-	541,475	785,539	388,925	659,809	783,563	779,326	672,986
Japan	4,259,771	4,203,181	4,301,091	3,809,981	3,675,698	3,448,297	3,992,727	3,725,200
Malaysia	-	543,594	550,182	480,965	452,663	641,773	719,145	747,180
Thailand	-	346,644	468,638	343,494	312,200	343,349	406,992	340,056
AFRICA	-	908,357	883,120	665,099	833,233	789,887	747,725	775,597
South Africa	-	337,130	355,378	246,541	304,340	363,390	347,377	351,556
TOTAL	38,689,767	55,809,158	64,803,420	54,742,117	57,276,040	58,741,536	65,412,763	67,542,081

► NEW COMMERCIAL VEHICLE REGISTRATIONS BY COUNTRY (IN UNITS)

	2000	2010	2019	2020	2021	2022	2023	2024
EUROPE	2,889,904	2,308,825	2,981,609	2,537,257	2,866,418	2,442,421	2,943,483	3,057,122
Western Europe (1)	2,310,844	1,712,171	2,371,360	1,920,964	2,105,165	1,767,916	2,071,652	2,187,610
Germany	314,804	282,157	409,801	349,081	351,187	312,391	359,689	374,700
Belgium	63,304	60,157	91,992	78,503	80,688	65,261	78,339	75,903
Spain	335,684	132,104	242,993	179,570	174,604	145,602	178,511	202,356
France	418,038	420,280	541,448	449,912	483,279	397,519	433,778	436,640
Italy	225,517	202,573	215,681	183,003	211,825	188,133	230,826	233,809
Netherlands	100,561	59,781	92,683	71,564	80,500	72,701	85,823	149,340
United Kingdom	253,372	262,730	425,419	333,596	401,824	329,509	404,384	415,796
Central and Eastern Europe (2) and Turkey	579,060	596,654	610,249	616,293	761,253	674,505	871,831	869,512
Poland	-	50,722	100,660	81,806	107,972	97,934	101,825	97,197
Russia	-	194,341	211,098	197,207	258,521	178,681	267,470	283,603
Turkey	199,825	251,129	104,691	186,041	210,997	238,560	316,705	305,448
AMERICA	-	8,588,367	15,774,705	13,953,898	14,980,625	14,326,117	16,277,080	17,074,266
Canada	736,951	889,039	1,479,594	1,267,724	1,384,245	1,304,482	1,506,596	1,652,671
USA	8,965,048	6,136,787	12,768,444	11,479,518	12,058,515	11,371,749	12,892,621	13,356,433
Mexico	302,944	344,606	596,215	445,217	526,620	647,481	818,214	919,215
Argentina	81,995	175,813	119,018	102,203	129,670	134,740	140,399	136,448
Brazil	302,288	658,524	525,777	442,495	561,384	527,799	587,289	686,223
ASIA/OCEANIA/MIDDLE EAST	-	7,909,760	8,188,353	8,174,755	8,215,050	7,189,855	7,914,349	7,363,248
Australia	-	208,167	263,604	240,164	296,575	303,741	327,627	323,835
China	-	4,304,142	4,324,840	5,133,338	4,795,939	3,300,458	4,030,874	3,873,204
South Korea	372,840	273,891	298,099	287,639	265,708	263,171	260,366	192,978
India	-	653,193	854,743	505,102	677,119	933,396	978,761	951,991
Indonesia	-	223,235	244,947	143,152	227,396	264,477	226,476	192,737
Iran	-	232,440	51,060	54,787	56,047	109,754	162,023	138,778
Japan	1,703,114	752,967	894,125	788,634	772,642	753,023	786,359	696,294
Malaysia	-	61,562	54,105	48,543	56,248	78,885	80,676	69,567
Thailand	-	453,713	538,914	448,652	436,380	506,039	368,788	232,619
AFRICA	-	342,864	317,171	260,609	300,287	285,853	302,380	278,014
South Africa	-	155,777	177,520	126,092	146,334	150,788	184,180	164,297
TOTAL	18,723,143	19,149,816	27,261,838	24,926,519	26,362,380	24,244,246	27,437,292	27,772,650

(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 (1)	2010	2015	2019	2020	2021	2022 (2)	2023	2024
Stellantis	-	-	-	-	-	2,379	2,027	2,125	1,970
	-	-	-	-	-	20.2%	18.2%	16.5%	15.2%
PSA Group (before 17 January 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	1,242	1,280
	10.5%	10.2%	9.5%	10.4%	10.2%	9.3%	9.5%	9.7%	9.9%
FCA Group (before 17 January 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	553	462
	8.2%	8.2%	7.3%	6.3%	5.7%	4.7%	4.9%	4.3%	3.6%
General Motors	1,590	1,196	943	3	0	1	2	2	2
	10.2%	8.6%	6.6%	0.0%	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	3,312	3,384
	19.5%	21.6%	24.8%	24.4%	25.4%	25.0%	24.7%	25.8%	26.1%
Mercedes-Benz Group (formerly Daimler)	830	676	839	1,030	776	680	659	735	739
	5.3%	4.9%	5.9%	6.5%	6.5%	5.8%	5.9%	5.7%	5.7%
BMW Group	772	753	936	1,047	847	858	808	915	924
	5.0%	5.4%	6.6%	6.6%	7.1%	7.3%	7.3%	7.1%	7.1%
Nissan	361	407	560	395	288	248	234	293	305
	2.3%	2.9%	3.9%	2.5%	2.4%	2.1%	2.1%	2.3%	2.4%
Toyota-Lexus-Daihatsu	852	629	603	796	692	755	789	888	1,004
	5.5%	4.5%	4.3%	5.0%	5.8%	6.4%	7.1%	6.9%	7.7%
Other Japanese brands	911	718	695	819	524	514	401	496	534
	5.8%	5.2%	4.9%	5.2%	4.4%	4.4%	3.6%	3.9%	4.1%
Hyundai-Kia	569	614	854	1,061	841	1016	1,036	1,098	1,070
	3.7%	4.4%	6.0%	6.7%	7.0%	8.6%	9.3%	8.6%	8.3%
Chinese brands groups	-	-	-	-	-	2	132	302	368
	-	-	-	-	-	0.0%	1.2%	2.4%	2.8%
Geely-Volvo	249	231	285	341	297	316	296	349	413
	1.6%	1.7%	2.0%	2.2%	2.5%	2.7%	2.7%	2.7%	3.2%
Tata-JLR Group	128	100	179	224	161	141	110	134	142
	0.8%	0.7%	1.3%	1.4%	1.3%	1.2%	1.0%	1.0%	1.1%
Tesla	-	0	16	111	99	169	230	366	327
	-	0.0%	0.1%	0.7%	0.8%	1.4%	2.1%	2.9%	2.5%
Other brands	168	53	31	54	62	100	57	35	40
	1.1%	0.4%	0.3%	0.3%	0.5%	0.9%	0.5%	0.3%	0.3%
TOTAL EU + EFTA + UK	15,572	13,832	14,189	15,783	11,940	11,753	11,113	12,846	12,963
	100.0%	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%	+1.8%	+0.9%

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

(IN THOUSANDS OF UNITS AND SHARE IN TOTAL REGISTRATIONS)

	2005 (1)	2010	2015	2019	2020	2021	2022 (3)	2023	2024
Stellantis	-	-	-	-	-	680	503	579	592
	-	-	-	-	-	33.8%	31.2%	30.4%	29.1%
PSA Group (before 17 January 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	303	317
	15.4%	17.0%	16.5%	16.3%	15.1%	15.7%	14.6%	15.9%	15.6%
FCA Group (before 17 January 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	319	370
	10.9%	10.9%	14.8%	15.8%	16.4%	16.6%	17.7%	16.8%	18.2%
General Motors	153	78	104	0.2	0.2	0.2	0.1	0.6	1.1
	7.1%	5.0%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Volkswagen Group	212	185	218	271	218	212	163	231	256
	9.9%	11.8%	12.0%	12.2%	12.0%	10.5%	10.1%	12.2%	12.6%
Mercedes-Benz Group (formerly Daimler)(4)	166	140	172	222	199	194	167	176	192
	7.7%	8.9%	9.5%	10.0%	10.9%	9.6%	10.4%	9.3%	9.4%
IVECO	-	-	-	64	52	70	64	65	72
	-	-	-	2.9%	2.9%	3.5%	3.9%	3.4%	3.5%
Nissan	103	43	50	57	37	45	23	30	33
	4.8%	2.7%	2.7%	2.6%	2.1%	2.2%	1.4%	1.6%	1.6%
Toyota-Lexus-Daihatsu	65	39	41	55	56	84	77	101	103
	3.0%	2.5%	2.3%	2.5%	3.1%	4.2%	4.8%	5.3%	5.1%
Other Japanese brands	81	38	37	43	29	41	35	36	38
	3.8%	2.4%	2.0%	1.9%	1.6%	2.0%	2.2%	1.9%	1.9%
Hyundai-Kia	52	6	4	4	2	2	2	1	2
	2.4%	0.4%	0.2%	0.2%	0.1%	0.1%	0.1%	0.1%	0.1%
Other brands	78	27	35	28	28	34	58	59	59
	3.6%	1.7%	1.9%	1.3%	1.5%	1.7%	3.6%	3.1%	2.9%
TOTAL EU + EFTA + UK	2,149	1,569	1,813	2,218	1,819	2,011	1,614	1,903	2,035
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Annual variation	-	+8.8%	+11.4%	+2.8%	-18.0%	+10.5%	N/A	N/A	+7.0%

(1) Excluding Bulgaria.
(2) Excluding Bulgaria and Denmark.
(3) Excluding Bulgaria and Denmark and Iceland.
(4) From 2023 onwards, excluding the Fuso brand, which has been spun off into Daimler Truck (Other brands).

Car manufacturer groupings used:
Stellantis = Peugeot + Citroën + DS + Opel/Vauxhall (from 1 August 2017) + Alfa Romeo + Fiat + Lancia + Maserati + Chrysler + Jeep + Dodge + RAM + Abarth.
Renault Group = Renault (including Renault Trucks) + Alpine + Dacia + Lada (from 1 January 2017).
Ford Group = Ford Europe + Ford USA + various Ford brands.
General Motors = Opel/Vauxhall (until 31 July 2017) + Cadillac + Chevrolet + GMC.
Volkswagen Group = Volkswagen + Audi + Cupra + Porsche + Seat + Skoda + Bentley + Lamborghini + MAN + Scania + Quattro.
Mercedes-Benz Group = Mercedes-Benz + Smart + Maybach.
Iveco Group: prior to 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 + Zeekr + Lotus + LEVC.
Tata Group = Jaguar + Land Rover.
The scope of the groups corresponds to their status from 1 January 2024.

REGISTRATIONS

▶ REGISTRATIONS OF NEW PASSENGER CARS IN THE EUROPEAN UNION + EFTA + UK IN 2024

(SEE NOTE PAGE 76) (IN THOUSANDS OF UNITS AND SHARE IN TOTAL REGISTRATIONS)

	Stellantis (1)	Renault Group (1)	Volkswagen Group	Ford Group	BMW-Mini	Mercedes-Benz	Japanese brands	Korean brands	Chinese brands	Tesla	Total
Germany	349	126	1,137	100	268	271	242	167	31	38	2,815
	12.4%	4.5%	40.4%	3.6%	9.5%	9.6%	8.6%	5.9%	1.1%	1.3%	100.0%
Austria	23	18	98	7	21	13	33	19	8	8	254
	9.1%	7.2%	38.5%	2.6%	8.2%	5.0%	13.0%	7.3%	3.2%	3.0%	100.0%
Belgium	52	48	107	12	56	32	47	31	8	21	448
	11.6%	10.7%	23.8%	2.7%	12.6%	7.2%	10.5%	6.9%	1.8%	4.7%	100.0%
Denmark	16	9	50	6	12	13	26	10	8	16	173
	9.3%	4.9%	28.6%	3.4%	6.8%	7.6%	15.2%	5.6%	4.4%	9.2%	100.0%
Spain	148	119	236	26	53	48	171	130	48	17	1,017
	14.5%	11.7%	23.2%	2.5%	5.2%	4.7%	16.8%	12.8%	4.7%	1.6%	100.0%
Finland	4	1	18	2	4	4	19	8	1	4	74
	5.1%	1.9%	24.0%	3.2%	4.9%	5.8%	25.3%	11.4%	1.0%	5.0%	100.0%
France	453	425	258	44	87	53	204	89	32	41	1,718
	26.4%	24.7%	15.0%	2.5%	5.0%	3.1%	11.9%	5.2%	1.8%	2.4%	100.0%
Greece	32	7	17	3	9	4	42	14	5	2	137
	23.4%	5.2%	12.5%	2.4%	6.4%	2.6%	30.4%	10.0%	3.6%	1.4%	100.0%
Ireland	9	8	36	4	5	3	27	21	3	3	121
	7.3%	6.2%	29.5%	3.6%	4.3%	2.6%	22.4%	17.0%	2.1%	2.4%	100.0%
Italy	455	185	264	69	83	55	229	98	75	16	1,560
	29.1%	11.8%	16.9%	4.4%	5.3%	3.6%	14.7%	6.3%	4.8%	1.0%	100.0%
Luxembourg	5	3	15	1	6	4	3	3	1	2	47
	11.3%	6.8%	32.7%	2.5%	13.4%	8.7%	6.1%	6.2%	2.3%	3.6%	100.0%
Netherlands	38	26	73	13	27	15	58	54	10	30	381
	10.0%	6.9%	19.2%	3.5%	7.1%	3.8%	15.1%	14.2%	2.7%	7.9%	100.0%
Portugal	45	31	32	5	15	17	25	15	6	10	210
	21.6%	15.0%	15.3%	2.4%	7.3%	8.3%	11.7%	7.1%	2.7%	4.7%	100.0%
Sweden	16	7	69	5	14	17	37	22	7	22	270
	5.9%	2.7%	25.5%	1.7%	5.0%	6.3%	13.7%	8.2%	2.8%	8.2%	100.0%
European Union (14 countries)	1,645	1,014	2,410	297	660	550	1,162	680	241	228	9,226
	17.8%	11.0%	26.1%	3.2%	7.2%	6.0%	12.6%	7.4%	2.6%	2.5%	100.0%
Iceland	0	1	1	0	0	0	3	3	0	1	10
	3.6%	9.1%	8.8%	2.0%	1.6%	3.4%	29.2%	25.8%	2.4%	5.5%	100.0%
Norway	4	1	28	4	7	4	25	7	11	24	129
	3.1%	0.6%	21.5%	2.8%	5.7%	3.2%	19.1%	5.8%	8.8%	18.9%	100.0%
Switzerland	17	17	78	7	25	21	33	16	1	9	238
	7.3%	7.0%	32.7%	3.1%	10.4%	8.9%	13.7%	6.8%	0.4%	3.7%	100.0%
United Kingdom	206	90	456	110	173	105	303	207	95	50	1,953
	10.5%	4.6%	23.4%	5.6%	8.8%	5.4%	15.5%	10.6%	4.9%	2.6%	100.0%
Europe (18 countries)	1,881	1,123	2,972	418	865	680	1,525	914	349	312	11,556
	16.3%	9.7%	25.7%	3.6%	7.5%	5.9%	13.2%	7.9%	3.0%	2.7%	100.0%
Bulgaria	4	7	11	1	2	2	8	5	1	0	43
	8.9%	17.2%	26.1%	3.4%	4.7%	3.7%	19.0%	11.8%	2.3%	0.7%	100.0%
Croatia	9	8	20	1	2	1	11	7	2	1	64
	13.4%	12.9%	32.1%	2.3%	3.4%	2.0%	17.3%	10.6%	3.5%	0.9%	100.0%
Estonia	2	3	9	0	1	1	7	2	0	0	26
	7.3%	10.4%	35.5%	1.1%	2.3%	2.8%	26.9%	9.4%	0.4%	0.6%	100.0%
Hungary	8	7	25	7	6	5	40	13	3	2	122
	6.3%	6.1%	20.7%	5.6%	5.2%	4.3%	33.2%	11.0%	2.7%	1.7%	100.0%
Latvia	1	2	6	0	1	0	4	1	0	0	17
	6.9%	9.3%	35.6%	1.8%	4.5%	2.1%	25.6%	8.7%	0.9%	0.7%	100.0%
Lithuania	2	2	10	1	1	1	9	3	0	0	30
	6.5%	8.3%	34.3%	2.7%	2.8%	2.8%	28.4%	10.1%	0.3%	0.6%	100.0%
Poland	34	42	149	15	30	29	155	67	11	4	552
	6.2%	7.5%	26.9%	2.6%	5.4%	5.2%	28.1%	12.1%	1.9%	0.8%	100.0%
Czech Republic	14	15	102	7	6	8	31	34	4	4	232
	6.0%	6.5%	44.1%	2.9%	2.5%	3.5%	13.4%	14.9%	1.9%	1.6%	100.0%
Roumania	6	55	26	7	5	6	23	17	2	3	152
	3.9%	35.9%	16.9%	4.4%	3.4%	4.1%	15.2%	11.4%	1.5%	1.7%	100.0%
Slovakia	9	7	31	2	3	3	17	19	1	0	93
	9.1%	7.2%	33.7%	2.3%	2.9%	3.5%	18.2%	19.9%	1.6%	0.0%	100.0%
Slovenia	8	8	17	2	2	1	7	5	1	1	53
	15.5%	15.6%	32.2%	3.2%	3.0%	2.3%	12.9%	10.0%	2.6%	1.6%	100.0%
11 Eastern EU member states	96	156	408	43	58	58	313	175	27	15	1,384
	6.9%	11.3%	29.4%	3.1%	4.2%	4.2%	22.6%	12.6%	2.0%	1.1%	100.0%
EUROPE (29 COUNTRIES)	1,977	1,279	3,380	461	922	738	1,838	1,088	376	327	12,940
	15.3%	9.9%	26.1%	3.6%	7.1%	5.7%	14.2%	8.4%	2.9%	2.5%	100.0%

(1) That is, 358,666 units for Citroën, 640,831 for Peugeot, 37,480 for DS, 334,952 for Opel, 698,651 for Renault, 576,398 for Dacia and 4,299 for Alpine within this scope.

REGISTRATIONS

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

	2000	2010	2019	2020	2021	2022	2023	2024
Germany	3,378,343	2,916,259	3,607,258	2,917,678	2,622,132	2,651,357	2,844,609	2,817,331
Austria	309,427	328,563	329,363	248,740	239,803	215,050	239,150	253,789
Belgium	515,204	547,340	550,003	431,491	383,123	366,303	476,675	448,277
Denmark	112,688	153,583	225,410	198,162	185,382	148,293	172,745	173,114
Spain	1,381,515	982,015	1,258,251	851,210	859,476	813,376	949,359	1,016,885
Finland	134,646	107,346	114,188	96,430	98,502	81,673	87,502	74,064
France	2,133,884	2,251,669	2,214,279	1,650,118	1,659,004	1,529,035	1,774,723	1,718,412
Greece	290,222	141,501	114,226	80,977	100,911	105,282	134,484	137,075
Ireland	230,989	88,445	117,109	88,324	104,932	105,398	122,400	121,196
Iceland	-	-	11,719	9,369	12,797	16,689	17,541	10,233
Italy	2,415,600	1,961,578	1,916,865	1,381,646	1,457,868	1,316,768	1,567,151	1,559,229
Luxembourg	41,896	49,726	54,923	45,104	44,366	42,094	49,151	46,659
Norway	97,376	127,754	142,381	141,405	176,276	174,329	126,955	128,687
Netherlands	597,640	482,527	445,217	355,595	322,318	312,075	369,631	381,227
Portugal	257,834	223,464	223,799	145,136	146,637	156,304	199,623	209,715
United Kingdom	2,221,670	2,030,846	2,311,140	1,631,064	1,647,181	1,614,063	1,903,054	1,952,778
Sweden	290,529	289,684	356,036	292,024	301,008	288,088	289,820	269,582
Switzerland	316,519	292,453	311,256	236,703	238,355	224,272	252,215	239,535
TOTAL WESTERN EUROPE (17 THEN 18 COUNTRIES) (1)	14,725,982	12,974,753	14,303,423	10,801,176	10,600,071	10,160,449	11,576,788	11,557,788

► 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	2024
Germany	24,294	34,360	60,527	188,620	339,847	463,358	524,219	380,609
	0.7%	1.0%	1.7%	6.5%	13.0%	17.5%	18.4%	13.5%
Austria	5,433	6,754	9,242	15,972	33,366	34,165	47,621	44,622
	1.5%	2.0%	2.8%	6.4%	13.9%	15.9%	19.9%	17.6%
Belgium	2,712	3,648	8,830	14,976	22,647	37,581	93,285	127,703
	0.5%	0.7%	1.6%	3.5%	5.9%	10.3%	19.6%	28.5%
Denmark	692	1,524	5,575	8,032	24,998	30,822	62,715	89,199
	0.3%	0.7%	2.5%	4.1%	13.5%	20.8%	36.3%	51.5%
Spain	3,920	6,130	10,048	17,925	23,685	30,524	51,614	57,374
	0.3%	0.5%	0.8%	2.1%	2.8%	3.8%	5.4%	5.6%
Finland	502	776	1,897	4,246	10,150	14,528	29,535	21,868
	0.4%	0.6%	1.7%	4.4%	10.3%	17.8%	33.8%	29.5%
France	24,910	31,059	42,764	110,917	162,106	202,929	298,219	290,614
	1.2%	1.4%	1.9%	6.7%	9.8%	13.3%	16.8%	16.9%
Greece	37	86	190	679	2,176	2,827	6,379	8,707
	0.0%	0.1%	0.2%	0.8%	2.2%	2.7%	4.7%	6.4%
Ireland	622	1,178	3,443	4,000	8,594	15,649	22,852	17,459
	0.5%	0.9%	2.9%	4.5%	8.2%	14.8%	18.7%	14.4%
Iceland	415	687	899	2,281	3,527	5,564	8,781	2,661
	1.9%	3.8%	7.7%	24.3%	27.6%	33.3%	50.1%	26.0%
Italy	2,020	4,998	10,671	32,492	67,267	49,165	66,287	65,620
	0.1%	0.3%	0.6%	2.4%	4.6%	3.7%	4.2%	4.2%
Luxembourg	386	430	984	2,471	4,648	6,391	11,033	12,778
	0.7%	0.8%	1.8%	5.5%	10.5%	15.2%	22.4%	27.4%
Norway	33,025	46,092	60,315	75,333	113,715	138,260	104,587	114,396
	20.8%	31.2%	42.4%	53.3%	64.5%	79.3%	82.4%	88.9%
Iceland	7,960	23,985	61,547	72,855	62,649	73,250	113,966	132,166
	1.9%	5.4%	13.8%	20.5%	19.4%	23.5%	30.8%	34.7%
Portugal	1,640	4,073	6,883	7,830	14,276	17,817	36,390	41,757
	0.7%	1.8%	3.1%	5.4%	9.7%	11.4%	18.2%	19.9%
United Kingdom	13,597	15,474	37,782	108,148	190,715	267,196	314,687	381,970
	0.5%	0.7%	1.6%	6.6%	11.6%	16.6%	16.5%	19.6%
Sweden	4,217	7,078	15,595	27,968	57,470	95,035	112,179	94,333
	1.1%	2.0%	4.4%	9.6%	19.1%	33.0%	38.7%	35.0%
Switzerland	4,726	5,161	13,143	19,485	31,806	39,842	52,728	46,141
	1.5%	1.7%	4.2%	8.2%	13.3%	17.8%	20.9%	19.3%
Total Western Europe (17 then 18 countries) (1)	131,108	193,493	350,335	714,230	1,173,642	1,524,903	1,957,077	1,929,977
Share of 100% electric in Europe	0.9%	1.4%	2.4%	6.6%	11.1%	15.0%	16.9%	16.7%
Annual variation	-	+47.6%	+81.1%	+103.9%	+64.3%	+29.9%	+28.3%	-1.4%

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

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	2019	2020	2021	2022	2023	2024
Germany	Hybrid	10,174	240,697	503,735	683,544	818,391	840,304	947,398
		0.3%	6.7%	17.3%	26.1%	30.9%	29.5%	33.6%
	including PHEV	-	-	-	-	362,093	175,724	191,905
		-	-	-	-	13.7%	6.2%	6.8%
Austria	Hybrid	1,248	16,540	32,053	56,121	54,126	67,586	81,018
		0.4%	5.0%	12.9%	23.4%	25.2%	28.3%	31.9%
	including PHEV	-	-	-	-	13,268	16,956	16,919
		-	-	-	-	6.2%	7.1%	6.7%
Belgium	Hybrid	4,073	34,092	70,271	111,230	114,185	137,089	108,339
		0.7%	6.2%	16.3%	29.0%	31.2%	28.8%	24.2%
	including PHEV	-	-	-	-	59,269	100,308	67,034
		-	-	-	-	16.2%	21.0%	15.0%
Denmark	Hybrid	148	17,330	27,880	49,319	54,696	47,549	36,961
		0.1%	7.7%	14.1%	26.6%	36.9%	27.5%	21.4%
	including PHEV	-	-	-	-	26,440	17,283	7,092
		-	-	-	-	17.8%	10.0%	4.1%
Spain	Hybrid	6,253	114,531	148,193	273,130	287,460	365,009	450,923
		0.6%	9.1%	17.4%	31.8%	35.3%	38.4%	44.3%
	including PHEV	-	-	-	-	47,791	62,164	58,558
		-	-	-	-	5.9%	6.5%	5.8%
France	**Hybrid**	**9,655**	**125,372**	**243,464**	**427,477**	**459,216**	**595,249**	**735,287**
		0.4%	**5.7%**	**14.8%**	**25.8%**	**30.0%**	**33.5%**	**42.8%**
	including PHEV	**-**	**-**	**-**	**-**	**126,547**	**162,950**	**146,392**
		-	**-**	**-**	**-**	**8.3%**	**9.2%**	**8.5%**
Italy	Hybrid	4,841	116,333	253,171	492,675	515,518	634,559	675,457
		0.2%	6.1%	18.3%	33.8%	39.2%	40.5%	43.3%
	including PHEV	-	-	-	-	64,632	69,008	51,792
		-	-	-	-	4.9%	4.4%	3.3%
Norway	Hybrid	3,144	37,869	45,326	52,209	24,321	17,754	10,358
		2.5%	26.6%	32.1%	29.6%	14.0%	14.0%	8.0%
	including PHEV	-	-	-	-	16,121	10,170	3,489
		-	-	-	-	9.2%	8.0%	2.7%
Netherlands	Hybrid	16,099	36,928	65,838	103,550	112,395	137,152	159,705
		3.3%	8.3%	18.5%	32.1%	36.0%	37.1%	41.9%
	including PHEV	-	-	-	-	34,742	47,082	52,581
		-	-	-	-	11.1%	12.7%	13.8%
United Kingdom	Hybrid	22,148	265,306	312,141	460,272	581,406	742,382	857,151
		1.1%	11.5%	19.1%	27.9%	36.0%	39.0%	43.9%
	including PHEV	-	-	-	-	101,414	141,311	167,178
		-	-	-	-	6.3%	7.4%	8.6%
Sweden	Hybrid	3,628	57,870	105,725	131,412	125,204	84,599	90,522
		1.3%	16.3%	36.2%	43.7%	43.5%	29.2%	33.6%
	including PHEV	-	-	-	-	66,614	61,024	63,113
		-	-	-	-	23.1%	21.1%	23.4%
Switzerland	Hybrid	4,210	26,990	44,875	74,960	73,956	92,050	101,314
		1.4%	8.7%	19.0%	31.4%	33.0%	36.5%	42.3%
	including PHEV	-	-	-	-	18,355	23,220	20,801
		-	-	-	-	8.2%	9.2%	8.7%
Total Western Europe (17 then 18 countries) (1)	**Hybrid**	**90,198**	**1,151,196**	**1,944,146**	**3,068,616**	**3,384,704**	**3,962,479**	**4,478,751**
		0.7%	**8.0%**	**18.0%**	**28.9%**	**33.3%**	**34.2%**	**38.8%**
	including PHEV	**-**	**-**	**-**	**-**	**990,332**	**958,201**	**916,340**
		-	**-**	**-**	**-**	**9.7%**	**8.3%**	**7.9%**

(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	2019	2020	2021	2022	2023	2024
Stellantis	-	-	-	-	2,238	1,923	2,033	1,872
	-	-	-	-	21.1%	19.2%	17.6%	16.2%
PSA Group (before 17 January 2021)	1,930	1,776	2,302	1,617	-	-	-	-
	13.1%	13.7%	16.1%	15.0%	-	-	-	-
Renault Group	1,559	1,305	1,436	1,063	962	924	1,096	1,123
	10.6%	10.1%	10.0%	9.8%	9.1%	9.2%	9.5%	9.7%
FCA Group (before 17 January 2021)	1,575	1,035	877	638	-	-	-	-
	10.7%	8.0%	6.1%	5.9%	-	-	-	-
Ford Group	1,248	1,063	917	635	504	493	514	418
	8.5%	8.2%	6.4%	5.9%	4.8%	4.9%	4.4%	3.6%
General Motors	1,720	1,119	3	0	1	2	0	0
	11.7%	8.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Volkswagen Group	2,776	2,757	3,437	2,701	2,615	2,441	2,929	2,972
	18.8%	21.3%	24.0%	25.0%	24.7%	24.3%	25.3%	25.7%
Mercedes-Benz Group (formerly Daimler)	811	662	984	735	636	614	684	680
	5.5%	5.1%	6.9%	6.8%	6.0%	6.1%	5.9%	5.9%
BMW Group	499	735	1,001	807	810	760	858	865
	3.4%	5.7%	7.0%	7.5%	7.6%	7.6%	7.4%	7.5%
Nissan	392	384	364	266	228	219	275	279
	2.7%	3.0%	2.5%	2.5%	2.2%	2.2%	2.4%	2.4%
Toyota-Lexus-Daihatsu	576	582	673	574	618	643	701	794
	3.9%	4.5%	4.7%	5.3%	5.8%	6.4%	6.1%	6.9%
Other Japanese brands	701	651	697	453	437	343	424	452
	4.8%	5.0%	4.9%	4.2%	4.1%	3.4%	3.7%	3.9%
Hyundai-Kia	303	539	919	727	864	886	935	902
	2.1%	4.2%	6.4%	6.7%	8.2%	8.8%	8.1%	7.8%
Chinese brand groups	-	-	-	-	2	131	294	341
	-	-	-	-	0.0%	1.3%	2.5%	3.0%
Geely-Volvo	230	222	321	279	296	276	325	383
	1.6%	1.7%	2.2%	2.6%	2.8%	2.8%	2.8%	3.3%
Tata Group-JLR	112	97	216	155	136	105	128	135
	0.8%	0.7%	1.5%	1.4%	1.3%	1.0%	1.1%	1.2%
Tesla	-	0	111	98	167	226	353	312
	-	0.0%	0.8%	0.9%	1.6%	2.3%	3.0%	2.7%
Other brands	304	50	45	52	93	45	25	28
	2.1%	0.4%	0.3%	0.5%	0.9%	0.4%	0.2%	0.2%
TOTAL WESTERN EUROPE (1)	14,738	12,975	14,303	10,801	10,600	10,031	11,575	11,556
Annual variation	-2.1%	-5.0%	+0.7%	-24.5%	-1.9%	N/A (2)	N/A (2)	-0.2%

(1) Including Iceland from 2015. Excluding Denmark from 2022.
(2) Year-on-year change: N/A (not available) as the figures are not comparable.

► NEW LIGHT COMMERCIAL VEHICLE REGISTRATIONS BY GROUP IN WESTERN EUROPE (IN THOUSANDS OF UNITS AND SHARE IN TOTAL REGISTRATIONS)

	2000	2010	2019	2020	2021	2022	2023	2024
Stellantis	-	-	-	-	624	465	537	550
	-	-	-	-	34%	31.7%	30.9%	31.7%
PSA Group (before 17 January 2021)	349	326	521	430	-	-	-	-
	18.1%	22.1%	25.5%	25.7%	-	-	-	-
Renault Group	272	251	328	249	277	207	268	282
	14.1%	17.0%	16.1%	14.9%	15.0%	14.1%	15.4%	16.2%
FCA Group (before 17 January 2021)	275	214	178	147	-	-	-	-
	14.2%	14.5%	8.7%	8.8%	-	-	-	-
Ford Group	180	161	326	275	308	262	293	338
	9.3%	10.9%	16.0%	16.4%	16.7%	17.8%	16.9%	19.4%
General Motors	92	75	0	0	0	0	1	1
	4.8%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Volkswagen Group	202	170	250	202	198	153	214	236
	10.5%	11.6%	12.2%	12.1%	10.7%	10.4%	12.3%	13.6%
Mercedes-Benz Group (formerly Daimler) (1)	178	133	209	186	182	157	164	179
	9.2%	9.0%	10.2%	11.1%	9.9%	10.7%	9.5%	10.3%
IVECO (2)	-	-	55	46	59	52	55	61
	-	-	2.7%	2.7%	3.2%	3.6%	3.2%	3.5%
Nissan	100	41	55	36	44	22	30	32
	5.2%	2.8%	2.7%	2.2%	2.4%	1.5%	1.7%	1.8%
Toyota-Lexus-Daihatsu	69	37	48	48	72	66	83	84
	3.6%	2.5%	2.4%	2.9%	3.9%	4.5%	4.8%	4.9%
Other Japanese brands	102	36	37	23	37	30	33	34
	5.3%	2.4%	1.8%	1.4%	2.0%	2.1%	1.9%	2.0%
Hyundai-Kia	44	5	3	2	2	1	1	2
	2.3%	0.4%	0.2%	0.1%	0.1%	0.1%	0.1%	0.1%
Other brands	69	26	30	31	38	53	57	57
	3.6%	1.8%	1.5%	1.8%	2.0%	3.6%	3.3%	3.3%
TOTAL WESTERN EUROPE (3)	1,931	1,475	2,041	1,676	1,839	1,470	1,736	1,856
Annual variation	+5.6%	+11.1%	+2.9%	-17.9%	+9.7%	N/A (4)	N/A (4)	+6.9%

(1) From 2023, excluding the Fuso brand, which has been spun off into Daimler Truck (Other brands).
(2) Prior to 2019, IVECO was included in the FCA group.
(3) Including Iceland from 2015. Excluding Denmark in 2022.
(4) Year-on-year change N/A as not comparable.
The scope of the groups corresponds to their situation as at 1 January 2024 (see page 76).

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	2019	2020	2021	2022	2023	2024
Stellantis	-	-	-	-	140	103	91	96
	-	-	-	-	12.2%	9.5%	7.2%	6.9%
PSA Group (before 17 January 2021)	99	73	165	102	-	-	-	-
	9.5%	8.5%	11.2%	8.9%	-	-	-	-
Renault Group	193	112	211	155	126	126	145	157
	18.7%	13.0%	14.2%	13.6%	10.9%	11.6%	11.5%	11.2%
FCA Group (before 17 January 2021)	50	45	65	59	-	-	-	-
	4.8%	5.3%	4.4%	5.2%	-	-	-	-
Ford Group	59	65	77	48	50	46	39	44
	5.7%	7.5%	5.2%	4.3%	4.3%	4.3%	3.1%	3.1%
General Motors	132	76	0	0	0	0	0	0
	12.7%	8.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Volkswagen Group	257	226	422	338	320	302	382	411
	24.8%	26.4%	28.5%	29.7%	27.8%	27.9%	30.2%	29.3%
Mercedes-Benz Group (formerly Daimler)	11	13	46	41	44	45	50	58
	1.1%	1.6%	3.1%	3.6%	3.8%	4.1%	4.0%	4.2%
BMW Group	11	17	46	40	48	48	56	59
	1.0%	2.0%	3.1%	3.5%	4.2%	4.4%	4.5%	4.2%
Nissan	19	23	30	22	20	14	18	26
	1.8%	2.6%	2.0%	1.9%	1.7%	1.3%	1.4%	1.9%
Toyota-Lexus-Daihatsu	60	47	122	118	140	146	185	209
	5.8%	5.5%	8.3%	10.3%	12.1%	13.5%	14.7%	14.9%
Other Japanese brands	91	67	122	71	77	58	72	81
	8.7%	7.9%	8.2%	6.3%	6.7%	5.4%	5.7%	5.8%
Hyundai-Kia	39	75	141	114	152	150	162	167
	3.8%	8.7%	9.6%	10.0%	13.2%	13.9%	12.8%	11.9%
Geely-Volvo	7	9	20	19	20	20	23	30
	0.6%	1.1%	1.3%	1.6%	1.7%	1.8%	1.9%	2.2%
Tata Group-JLR	2	3	8	5	5	5	6	7
	0.2%	0.3%	0.5%	0.5%	0.5%	0.5%	0.4%	0.5%
Tesla	-	0	0	0	2	3	14	15
	-	0.3%	0.0%	0.0%	0.2%	0.3%	1.1%	1.1%
Other brands	7	6	5	6	9	15	19	40
	0.7%	0.7%	0.3%	0.5%	0.8%	1.4%	1.5%	2.8%
TOTAL CEE COUNTRIES MEMBERS OF THE EU (1)	1,035	857	1,479	1,139	1,153	1,082	1,264	1,399
Annual variation	-	-4.8%	+5.9%	-23.0%	+1.2%	N/A	N/A	+10.7%

► REGISTRATIONS OF NEW LIGHT COMMERCIAL VEHICLES IN CENTRAL AND EASTERN EUROPEAN COUNTRIES MEMBER OF THE EU (1) (IN THOUSANDS OF UNITS AND SHARE IN TOTAL REGISTRATIONS)

	2005 (1)	2010	2019	2020	2021	2022	2023	2024
Stellantis	-	-	-	-	51	31	41	42
	-	-	-	-	29.9%	25.7%	25.1%	23.3%
PSA Group (before 17 January 2021)	20	18	36	30	-	-	-	-
	13.6%	19.5%	20.5%	20.7%	-	-	-	-
Renault Group	35	15	34	26	39	24	34	35
	24.4%	16.3%	19.0%	18.2%	22.5%	19.7%	20.9%	19.8%
FCA Group (before 17 January 2021)	21	19	24	18	-	-	-	-
	14.7%	19.8%	13.8%	12.3%	-	-	-	-
Ford Group	14	10	25	22	26	21	26	32
	9.8%	10.1%	13.8%	15.7%	15.1%	17.4%	15.5%	17.9%
General Motors	8	3	0	0	0	0	0	0
	5.2%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Volkswagen Group	21	14	21	16	13	9	17	20
	14.7%	14.9%	12.1%	11.1%	7.6%	7.5%	10.6%	11.3%
Mercedes-Benz Group (formerly Daimler) (2)	10	7	14	13	12	11	12	13
	6.8%	7.9%	7.7%	8.8%	7.0%	9.1%	7.3%	7.2%
IVECO (3)	-	-	9	7	11	10	10	11
	-	-	5.3%	4.8%	6.3%	8.3%	6.1%	6.1%
Nissan	2	2	2	1	1	0	0	1
	1.4%	2.5%	1.3%	0.7%	0.8%	0.3%	0.3%	0.3%
Toyota-Lexus-Daihatsu	2	2	7	8	13	10	18	19
	1.6%	2.2%	4.1%	5.7%	7.3%	8.0%	10.7%	10.7%
Other Japanese brands	3	2	3	2	4	3	2	2
	2.3%	2.1%	1.7%	1.4%	2.0%	2.5%	1.3%	1.2%
Hyundai-Kia	5	1	0	0	0.04	0	0	0
	3.2%	0.7%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Other brands	4	1	1	1	3	2	4	4
	2.5%	0.8%	0.6%	0.5%	1.5%	0.0%	2.2%	2.1%
TOTAL EU MEMBER STATES IN CENTRAL AND EASTERN EUROPE (1) (4)	145	95	177	143	172	121	165	178
Annual variation	-	-17.5%	+2.0%	-19.2%	+20.1%	N/A	N/A	+8.0%

(1) Excluding Bulgaria in 2005 and 2022 (the year-on-year change is N/A as the scope is not comparable).
(2) From 2023 onwards, excluding the Fuso brand, which has been spun off into Daimler Truck (Other brands).
(3) Prior to 2019, IVECO was part of the FCA Group.
(4) Excluding the Czech Republic in 2022.
The scope of the groups reflects their situation as at 1 January 2024 (see page 76).
Source: CCFA

REGISTRATIONS

► REGISTRATIONS OF NEW LIGHT COMMERCIAL VEHICLES (UP TO 5 TONNES) BY COUNTRY (1) (IN UNITS)

	2000	2010	2019	2020	2021	2022	2023	2024
Germany	212,290	202,446	309,963	272,590	270,466	231,290	259,376	281,078
Austria	27,243	28,130	43,578	36,634	58,956	24,651	30,701	33,075
Belgium	54,090	56,006	86,672	77,111	79,008	56,102	67,549	65,780
Denmark	33,092	16,848	34,529	31,116	31,558	27,144	25,735	28,053
Spain	299,246	116,770	215,784	158,863	152,335	119,784	146,142	166,157
Finland	15,056	11,550	15,611	13,729	13,774	11,191	11,021	9,735
France	414,966	417,612	479,784	402,383	432,631	347,069	375,510	379,747
Greece	23,008	10,935	8,144	7,003	10,570	9,664	10,008	9,872
Ireland	41,474	10,486	25,330	21,716	28,762	23,510	28,854	30,785
Iceland			1,451	1,050	1,207	1,607	1,971	1,870
Italy	225,517	177,887	189,245	160,639	185,300	159,426	196,732	198,517
Luxembourg	3,083	3,291	5,308	4,804	5,060	4,004	5,410	3,997
Norway	31,627	30,422	39,313	33,609	35,479	29,481	29,574	28,459
Netherlands	96,570	49,863	76,458	60,638	68,690	59,173	69,297	129,878
Portugal	152,836	45,756	38,546	27,637	28,847	23,637	28,523	32,304
United Kingdom	245,163	231,539	376,386	300,199	362,358	283,836	344,845	354,265
Sweden	31,854	38,543	54,127	31,239	36,404	34,516	43,713	38,328
Switzerland	24,121	26,507	40,659	35,064	37,571	25,170	30,570	30,741
TOTAL WESTERN EUROPE (17 THEN 18 COUNTRIES)	1,931,236	1,474,591	2,040,888	1,676,024	1,838,976	1,471,255	1,705,531	1,822,641

(1) From 2022, the scope is limited to vehicles weighing less than 3.5 tonnes (previously <5.1 tonnes).

► REGISTRATIONS OF NEW COACHES AND BUSES (OVER 5 TONNES) BY COUNTRY (2) (IN UNITS)

	2000	2010	2019	2020	2021	2022	2023	2024
Germany	96,830	75,014	93,714	70,435	78,981	76,218	94,820	88,240
Austria	8,508	5,138	7,946	5,605	6,680	7,079	8,008	7,970
Belgium	11,061	7,133	11,518	7,535	8,181	8,566	10,058	9,280
Denmark	4,597	2,682	4,951	5,036	4,384	4,872	4,973	4,820
Spain	33,700	13,215	24,019	18,604	20,805	23,462	28,685	32,140
Finland	3,072	2,368	3,237	2,620	3,536	3,339	3,942	3,434
France	57,918	34,221	55,215	41,729	45,030	44,567	52,143	50,635
Greece	1,633	1,081	402	545	568	676	726	880
Ireland	4,666	1,011	2,223	1,953	2,271	2,203	2,654	2,865
Iceland			273	178	275	287	423	386
Italy	38,388	17,532	23,413	20,083	24,762	25,688	28,889	28,698
Luxembourg	1,451	803	1,290	1,024	1,054	1,425	1,832	1,081
Norway	3,564	3,126	6,117	4,686	6,035	5,603	6,477	6,137
Netherlands	16,835	9,390	15,192	10,288	11,742	13,291	16,139	18,574
Portugal	7,403	3,116	4,920	3,543	4,264	4,707	6,915	6,381
United Kingdom	51,864	27,988	48,535	32,918	42,825	45,859	54,016	52,874
Sweden	5,549	4,605	7,165	5,364	5,910	6,024	7,184	5,792
Switzerland	4,733	3,388	4,405	3,821	3,565	3,716	4,482	4,984
TOTAL WESTERN EUROPE (17 THEN 18 COUNTRIES)	351,772	211,811	314,535	235,967	270,868	277,582	332,366	325,171

► REGISTRATIONS OF NEW COACHES AND BUSES (OVER 5 TONNES) BY COUNTRY (2) (IN UNITS)

	2000	2010	2019	2020	2021	2022	2023	2024
Germany	5,684	4,697	6,124	6,044	6,474	4,883	5,493	5,382
Austria	706	733	1,146	854	887	928	1,165	1,018
Belgium	974	909	1,250	726	945	590	732	843
Denmark	419	450	184	268	636	667	388	506
Spain	2,738	2,119	3,147	2,069	1,877	2,356	3,679	4,059
Finland	0	300	518	249	382	417	249	561
France	4,320	5,382	6,417	5,791	6,857	5,883	6,125	6,258
Greece	374	325	202	185	454	255	252	874
Ireland	121	47	442	129	444	287	340	576
Iceland	-	-	48	14	30	35	143	197
Italy	4,152	3,931	3,988	2,948	3,469	3,277	5,205	6,594
Luxembourg	108	173	263	197	167	301	247	318
Norway	427	1,052	2,013	1,177	1,083	591	1,032	858
Netherlands	949	524	910	639	338	237	392	888
Portugal	806	418	567	395	586	1,484	984	850
United Kingdom	4,496	3,203	3,100	2,100	4,136	4,253	5,523	8,657
Sweden	1,071	1,302	1,150	1,588	728	1,241	1,118	783
Switzerland	491	476	568	586	646	471	676	576
TOTAL WESTERN EUROPE (17 THEN 18 COUNTRIES)	27,836	26,041	32,037	25,959	30,139	28,156	33,743	39,798

(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	2010	2019	2020	2021	2022	2023	2024
Bulgaria	-	15,646	39,419	27,214	24,631	28,680	37,724	42,941
Croatia	62,009	38,587	62,938	36,084	45,289	43,928	57,694	65,020
Estonia	10,600	10,295	27,585	19,278	22,608	20,426	22,820	25,386
Hungary	133,233	43,476	157,906	128,031	121,920	111,524	107,720	121,611
Latvia	7,300	6,365	18,233	13,516	14,366	16,824	18,928	17,329
Lithuania	6,158	7,970	46,388	40,338	31,454	25,496	27,666	30,122
Poland	478,752	333,490	553,942	428,527	446,443	419,749	475,032	551,568
Czech Republic	148,592	169,580	249,915	202,971	206,876	192,084	221,419	231,597
Romania	64,432	106,333	161,562	126,351	121,208	129,328	143,080	151,105
Slovakia	55,090	64,033	101,568	76,305	75,696	78,841	88,003	93,409
Slovenia	67,665	61,142	59,862	40,200	42,071	46,339	48,924	53,018
TOTAL (1)	907,400	818,330	1,479,318	1,138,815	1,152,562	1,113,219	1,249,010	1,383,106

► REGISTRATIONS OF LIGHT COMMERCIAL VEHICLES (UP TO 5 TONNES) IN EU CENTRAL AND EASTERN EUROPEAN COUNTRIES (2) (IN UNITS)

	2000	2010	2019	2020	2021	2022	2023	2024
Bulgaria	-	3,211	5,985	5,060	6,659	4,885	5,192	6,794
Croatia	3,360	2,845	9,143	7,025	8,131	5,630	7,463	8,495
Estonia	1,500	1,406	4,487	3,332	4,225	3,710	3,904	4,080
Hungary	26,686	9,337	26,410	22,305	23,170	17,652	20,749	24,782
Latvia	900	649	2,783	2,178	2,625	2,406	2,699	2,737
Lithuania	1,270	1,044	4,606	3,103	3,471	3,321	3,104	2,893
Poland	33,653	42,852	68,010	57,286	70,899	62,236	64,522	66,853
Czech Republic	14,786	11,318	20,612	17,331	19,672	16,899	22,735	21,761
Romania	14,789	10,404	19,122	14,754	17,178	14,826	17,235	20,212
Slovakia	5,812	6,953	8,534	6,392	8,275	7,679	9,107	9,061
Slovenia	6,274	4,744	8,653	6,275	7,490	7,132	7,686	8,577
TOTAL (1)	90,900	91,918	178,345	145,041	171,795	146,376	164,396	176,245

► 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	45,404	32,274	31,290	33,565	42,916	49,735
Croatia	65,369	41,432	72,081	43,109	53,420	49,558	65,157	73,515
Estonia	12,100	11,701	32,072	22,610	26,833	24,136	26,724	29,466
Hungary	159,919	52,813	184,316	150,336	145,090	129,176	128,469	146,393
Latvia	8,200	7,014	21,016	15,694	16,991	19,230	21,627	20,066
Lithuania	7,428	9,014	50,994	43,441	34,925	28,817	30,770	33,015
Poland	512,405	376,342	621,952	485,813	517,342	481,985	539,554	618,421
Czech Republic	163,378	180,898	270,527	220,302	226,548	208,983	244,154	253,358
Romania	79,221	116,737	180,684	141,105	138,386	144,154	160,315	171,317
Slovakia	60,902	70,986	110,102	82,697	83,971	86,520	97,110	102,470
Slovenia	73,939	65,886	68,515	46,475	49,561	53,471	56,610	61,595
TOTAL (1)	998,300	910,248	1,657,663	1,283,856	1,324,357	1,259,595	1,413,406	1,559,351

► REGISTRATIONS OF COMMERCIAL VEHICLES OVER 5 TONNES (INCLUDING COACHES AND BUSES) IN THE EU MEMBER STATES OF CENTRAL AND EASTERN EUROPE (4) (IN UNITS)

	2000	2010	2019	2020	2021	2022	2023	2024
Bulgaria	-	1,000	3,621	2,235	3,276	3,917	-	-
Croatia	612	599	1,741	1,000	1,403	1,744	2,166	2,245
Estonia	400	502	1,207	697	1,041	1,243	1,020	825
Hungary	2,900	2,408	5,776	3,639	5,486	6,395	7,179	5,697
Latvia	1,000	520	1,169	764	1,573	1,934	2,045	1,596
Lithuania	1,000	1,355	7,688	4,379	8,121	10,049	10,932	7,262
Poland	7,464	11,611	28,758	20,759	34,046	35,698	37,303	30,344
Czech Republic	6,400	5,750	10,889	8,552	9,685	10,186	11,488	10,503
Romania	3,113	2,686	7,740	4,838	7,104	7,406	9,097	8,441
Slovakia	1,796	2,870	3,691	2,181	3,397	3,554	4,732	3,664
Slovenia	1,876	985	2,456	1,380	2,023	2,431	2,660	2,315
TOTAL (1)	22,800	29,700	73,315	50,424	77,155	84,557	88,622	72,892

(1) New Member States: 8 countries in 2000, 10 countries from 2006 to 2012, 11 countries from 2013.
(2) The scope is limited to vehicles weighing less than 3.5 tonnes from 2022 (<5.1 tonnes previously).
(3) The scope is being extended to vehicles weighing over 3.5 tonnes from 2021 (previously over 5.1 tonnes).
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	2010	2019	2020	2021	2022	2023	2024
Citroën	1,168,470	1,452,847	980,758	699,087	745,029	743,439	740,800	649,047
DS	-	-	62,601	40,735	46,759	61,427	56,965	37,433
Peugeot	1,708,968	2,152,331	1,455,444	1,112,263	1,145,276	1,104,977	1,167,541	1,085,494
Opel	-	-	920,314	611,467	606,960	616,010	703,419	588,245
Others (Fiat, Toyota)	-	-	17,092	13,852	61,487	101,046	179,540	252,048
Stellantis (excluding FCA) (1)	**2,877,438**	**3,605,178**	**3,436,209**	**2,477,404**	**2,605,511**	**2,626,899**	**2,848,265**	**2,612,267**
Renault	2,356,616	2,099,027	2,610,246	1,817,712	1,616,750	1,632,655	1,705,734	1,685,086
Alpine	-	-	4,244	1,279	3,005	3,782	4,708	4,783
Dacia	55,183	341,090	696,018	508,249	529,045	626,392	657,156	695,014
Renault Korea Motors	14,517	276,169	143,143	107,814	112,964	52,110	20,620	5,748
Lada (until April 2022)	-	-	407,963	364,062	360,668	71,149	0	0
Others (Mobilize, Nissan, Mercedes, Mitsubishi)	-	-	-	-	35,788	39,630	3,253	21,877
Renault Group	**2,426,316**	**2,716,286**	**3,861,614**	**2,799,116**	**2,658,220**	**2,425,718**	**2,391,471**	**2,412,508**
TOTAL (2)	**5,303,754**	**6,321,464**	**7,271,006**	**5,256,602**	**5,243,147**	**5,052,617**	**5,239,736**	**5,024,775**

► LIGHT VEHICLE PRODUCTION IN FRANCE (IN UNITS)

	2000	2010	2019	2020	2021	2022	2023	2024
Total Passenger cars	**2,879,810**	**1,924,131**	**1,661,448**	**927,344**	**918,823**	**1,010,463**	**1,023,292**	**910,375**
Including Stellantis (excluding FCA) and Groupe Renault	2,765,803	1,665,797	1,375,463	719,418	690,105	737,544	735,042	621,579
Including Smart and Ineos (from 2023)	101,365	97,373	62,961	19,926	26,718	16,983	16,505	9,194
Including Toyota	0	158,512	223,024	188,000	202,000	255,936	271,745	279,602
Total Light commercial vehicles	**409,966**	**262,479**	**509,563**	**388,655**	**433,407**	**372,707**	**476,868**	**447,460**
Including Stellantis (excluding FCA) and the Renault Group	370,538	243,029	509,563	388,655	433,407	372,707	476,868	441,654
Including Fiat	39,428	19,450	-	-	-	-	-	-
Total Light vehicles	**3,289,776**	**2,186,610**	**2,171,011**	**1,315,999**	**1,352,230**	**1,383,170**	**1,500,160**	**1,357,835**
Including Stellantis (excluding FCA) and the Renault Group	3,136,341	1,908,826	1,885,026	1,108,073	1,123,512	1,110,251	1,211,910	1,063,233

► PRODUCTION OF HEAVY VEHICLES IN FRANCE (IN UNITS)

	2000	2010	2019	2020	2021	2022	2023	2024
Renault Trucks (3)	**87,719**	**31,874**	**35,950**	**26,246**	**33,422**	**39,133**	**40,833**	**36,749**
Scania	10,710	9,594	N/A	N/A	N/A	N/A	N/A	N/A
Coaches and buses	**535**	**3,475**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**
Including Heuliez	-	451	N/A	N/A	N/A	N/A	N/A	N/A
Including IVECO BUS (4)	-	2,473	N/A	N/A	N/A	N/A	N/A	N/A
Including Daimler Buses (5)	535	551	N/A	N/A	N/A	N/A	N/A	N/A

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

	2000	2010	2019	2020	2021	2022	2023	2024
Total	**-**	**-**	**54,098**	**41,117**	**51,460**	**58,967**	**69,859**	**56,898**
16 t and more	-	-	30,002	21,328	27,475	32,781	33,748	30,294
7 to < 16 t	-	-	5,948	4,918	5,947	6,352	7,085	6,455
< 7 t	-	-	18,148	14,871	18,038	19,834	29,026	20,149

► 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 17 January 2021 to form the Stellantis Group. The FCA Group, a member of Stellantis, produced 2.9 million vehicles in 2024.
(2) Excluding double counting. See page 84.
(3) In 2001, Renault's heavy goods vehicle operations were merged with those of AB Volvo, which produced 226,000 vehicles in 2024.
From 2012 onwards, the scope of the commercial vehicle segment covers vehicles weighing 7 tonnes or more.
(4) Irisbus until 2013.
(5) Evobus until 11 July 2023.
Source: CCFA

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

► PRODUCTION OF PASSENGER CARS BY BRAND (IN UNITS)

	2000	2010	2019	2020	2021	2022	2023	2024
Citroën	976,232	1,272,385	788,127	538,568	561,448	580,114	566,836	513,759
DS	-	-	62,601	40,735	46,759	61,427	56,965	37,433
Peugeot	1,522,051	1,942,079	1,213,885	916,387	925,656	921,678	960,106	876,680
Opel	-	-	804,805	529,216	498,910	520,566	582,393	471,427
Others (Fiat, Toyota, Lancia)	-	-	-	-	26,355	29,580	42,272	75,764
Stellantis (excluding FCA)	**2,498,283**	**3,214,464**	**2,869,418**	**2,024,906**	**2,059,128**	**2,113,365**	**2,208,572**	**1,975,063**
Renault	2,043,815	1,796,321	2,152,285	1,486,511	1,202,439	1,255,366	1,229,042	1,256,601
Alpine	-	-	4,244	1,279	3,005	3,782	4,708	4,783
Dacia	42,603	323,386	668,584	481,118	511,817	626,392	657,156	695,014
Renault Korea Motors	14,517	276,169	143,143	107,814	112,964	52,110	20,620	5,748
Lada	-	-	407,963	364,062	360,668	71,149	0	0
Others (Mobilize, Nissan, Mercedes)	-	-	-	-	35,788	39,630	3,253	21,877
Renault Group	**2,100,935**	**2,395,876**	**3,376,219**	**2,440,784**	**2,226,681**	**2,048,429**	**1,914,779**	**1,984,023**
TOTAL	**4,599,218**	**5,610,340**	**6,245,637**	**4,465,690**	**4,285,809**	**4,161,794**	**4,123,351**	**3,959,086**
of which production in France	**2,765,803**	**1,665,797**	**1,375,463**	**719,418**	**690,105**	**737,544**	**735,042**	**621,579**
Citroën	504,323	468,398	119,364	87,054	63,071	76,268	76,038	52,738
DS	-	-	62,282	40,388	41,419	38,202	34,574	26,174
Peugeot	1,094,756	722,214	804,101	347,979	297,190	337,141	362,680	314,437
Opel	-	-	85,841	33,684	120,057	124,015	144,863	87,356
Others	-	-	-	-	13,014	13,640	15,444	14,168
Stellantis excluding FCA	**1,599,079**	**1,190,612**	**1,071,588**	**509,105**	**534,751**	**589,266**	**633,599**	**494,873**
Renault	1,166,724	475,185	299,631	209,034	116,561	106,404	93,531	116,638
Alpine	-	-	4,244	1,279	3,005	3,782	4,708	4,783
Autres	-	-	-	-	35,788	38,092	3,204	5,285
Renault Group	**1,166,724**	**475,185**	**303,875**	**210,313**	**155,354**	**148,278**	**101,443**	**126,706**

► PASSENGER CAR PRODUCTION BY MODEL IN 2024 (IN UNITS)

Brands/Models	World production	Production in France	Production outside France
STELLANTIS (hors FCA)	**1,975,063**	**494,873**	**1,480,190**
Citroën	**513,759**	**52,738**	**461,021**
C3, C3 IV	124,690	0	124,690
C3 E	89,287	0	89,287
C3 Aircross	66,020	0	66,020
C-Elysée	4,752	0	4,752
C4, C4 Cactus, C4 X	96,465	0	96,465
C5 X, C5 Aircross	70,097	46,522	23,575
Berlingo	47,016	0	47,016
Spacetourer	6,216	6,216	0
Divers	9,216	0	9,216
DS	**37,433**	**26,174**	**11,259**
DS3 Crossback	7,383	7,383	0
DS4 II	10,867	0	10,867
DS7 E-tense	18,791	18,791	0
DS9, DS9 Crossback	392	0	392
Peugeot	**876,680**	**314,437**	**562,243**
208	298,889	0	298,889
2008	196,282	0	196,282
308	92,963	92,963	0
3008	130,939	127,056	3,883
408	49,956	33,824	16,132
5008	47,619	47,619	0
508	9,821	7,930	1,891
Rifter / Partner	40,742	0	40,742
Traveller	5,045	5,045	0
Divers	4,424	0	4,424
Opel	**471,427**	**87,356**	**384,071**
Astra	81,732	0	81,732
Combo	22,114	0	22,114
Corsa	183,613	0	183,613
Crossland	38,032	0	38,032
Grandland	58,222	0	58,222
Frontera	293	0	293
Mokka	81,937	81,937	0
Zafira Life	5,419	5,419	0
Divers	65	0	65
Autres	**75,764**	**14,168**	**61,596**
Fiat	20,649	808	19,841
Fukang	6,003	0	6,003
Lancia	11,230	0	11,230
Toyota	37,882	13,360	24,522

Brands/Models	World production	Production in France	Production outside France
GROUPE RENAULT	**1,984,023**	**126,706**	**1,857,317**
Renault	**1,256,601**	**116,638**	**1,139,963**
Austral	89,572	0	89,572
Twingo	20,910	0	20,910
Clio	314,296	0	314,296
R5	24,835	24,835	0
Kwid	95,042	0	95,042
Kardian	44,019	0	44,019
Kiger	14,231	0	14,231
Captur	170,775	0	170,775
Zoe	2,400	2,400	0
Logan / Sandero	37,914	0	37,914
Rafale	20,137	0	20,137
Duster	72,697	0	72,697
Megane	84,185	30,260	53,925
Scenic	34,282	34,282	0
Express	14,671	0	14,671
Koleos	40,851	0	40,851
Espace	20,039	0	20,039
Arkana / XM3	65,365	0	65,365
Triber	24,697	0	24,697
Symbioz	39,620	0	39,620
Kangoo	24,717	24,717	0
Divers	1,346	144	1,202
Alpine	**4,783**	**4,783**	**0**
Dacia	**695,014**	**0**	**695,014**
Logan / Sandero	341,596	0	341,596
Spring	31,938	0	31,938
Duster	217,705	0	217,705
Jogger	103,775	0	103,775
Renault Korea Motors	**5,748**	**0**	**5,748**
Koleos	2,060	0	2,060
Talisman / SM6	633	0	633
Arkana / XM3	3,055	0	3,055
Autres (Trafic)	**21,877**	**5,285**	**16,592**
TOTAL	**3,959,086**	**621,579**	**3,337,507**

NB: Renault also produced 420 Duo/Bento models at its plants in Valladolid (Spain) and Busan (South Korea).
Stellantis produced the following models at its Kenitra plant in Morocco in 2024: 15,357 Citroën Ami, 1,450 Opel Rocks-E and 13,472 Fiat Topolino.
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	2010	2019	2020	2021	2022	2023	2024
Citroën	192,238	180,462	192,631	160,519	183,581	163,325	173,964	135,288
Peugeot	186,917	210,252	241,559	195,876	219,620	183,299	207,435	208,814
Opel	-	-	115,509	82,251	108,050	95,444	121,026	116,818
Others (Fiat, Toyota)	-	-	17,092	13,852	35,132	71,466	137,268	176,284
Stellantis (excluding FCA)	**379,155**	**390,714**	**566,791**	**452,498**	**546,383**	**513,534**	**639,693**	**637,204**
Renault (including partners)	312,801	302,706	457,961	331,201	414,311	377,289	476,692	428,485
Dacia	12,580	17,704	27,434	27,131	17,228	0	0	0
Renault Group	**325,381**	**320,410**	**485,395**	**358,332**	**431,539**	**377,289**	**476,692**	**428,485**
Renault Trucks	8,321	0	0	0	0	0	0	0
Miscellaneous	42	0	0	0	0	0	0	0
TOTAL (1)	**712,899**	**711,124**	**1,025,369**	**790,912**	**957,338**	**890,823**	**1,116,385**	**1,065,689**
of which production in France (1)	**370,538**	**243,029**	**509,563**	**388,655**	**433,407**	**372,707**	**476,868**	**441,654**
Citroën	53,561	42,882	31,826	16,111	20,224	12,785	15,707	13,650
Peugeot	67,629	38,514	60,488	37,275	37,271	19,469	21,782	19,924
Opel			44,809	36,959	49,063	18,583	24,233	16,111
Miscellaneous			17,092	13,852	19,904	37,967	38,881	31,663
Stellantis (including FCA)	**121,190**	**81,396**	**154,215**	**104,197**	**126,462**	**88,804**	**100,603**	**81,348**
Renault	240,985	161,633	382,165	304,376	327,529	283,903	376,265	360,306
Renault Group	**240,985**	**161,633**	**382,165**	**304,376**	**327,529**	**283,903**	**376,265**	**360,306**
Renault Trucks	8,321	-	-	-	-	-	-	-
Miscellaneous	42	-	-	-	-	-	-	-

(1) Excluding double-counted production of Opel vehicles from 2017.

► LIGHT COMMERCIAL VEHICLE PRODUCTION BY MODEL IN 2024 (IN UNITS)

Brands/Models	World production	Production in France	Production outside France
Stellantis (excluding FCA)	**637,204**	**81,348**	**555,856**
Citroën	**135,288**	**13,650**	**121,638**
Berlingo	57,296	0	57,296
Jumpy	35,305	13,650	21,655
Jumper	42,687	0	42,687
Peugeot	**208,814**	**19,924**	**188,890**
2008	1,714	0	1,714
3008	1,193	0	1,193
Partner	93,865	0	93,865
Expert	50,809	19,924	30,885
Boxer	53,813	0	53,813
Landtreck	6,270	0	6,270
Miscellaneous	1,150	0	1,150
Opel	**116,818**	**16,111**	**100,707**
Vivaro	47,732	16,111	31,621
Combo	40,351	0	40,351
Movano	28,735	0	28,735
Others	**176,284**	**31,663**	**144,621**
Fiat	106,361	10,528	95,833
Ram	9,108	0	9,108
Toyota (Proace, Proace city)	60,815	21,135	39,680
RENAULT GROUP	**428,485**	**360,306**	**68,179**
Renault (including partners)	**428,485**	**360,306**	**68,179**
Dokker / Ludospace	18,635	0	18,635
Kangoo	101,357	101,357	0
Trafic	131,886	131,886	0
Master	141,143	127,063	14,080
Express	34,381	0	34,381
Miscellaneous (Alaskan, Logan)	1,083		1,083
TOTAL	**1,065,689**	**441,654**	**624,035**

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	2010	2019	2020	2021	2022	2023	2024
Less than 3.5t	Total	577,926	531,452	708,800	521,245	656,929	612,264	313,715	775,089
	E	55,883	61,998	N/A	31,115	47,288	61,651	N/A	80,278
	D	521,229	469,178	N/A	476,462	581,709	482,587	N/A	637,552
	EL	814	276	13,057	13,668	27,932	68,026	92,987	57,259
From 3.5t to less than 5.1t	Total	134,973	179,672	316,569	269,667	300,409	278,559	162,977	290,600
	E	1,724	0	0	0	0	0	0	0
	D	133,249	179,672	316,215	269,348	299,610	277,261	N/A	285,398
	EL	-	-	354	319	799	1,298	2,586	2,810
Total petrol		57,607	61,998	nd	31,115	47,288	61,651	N/A	80,278
Total diesel		654,478	648,850	nd	745,810	881,319	759,848	N/A	922,950
Total electric		814	276	13,411	13,987	28,731	69,324	95,573	60,069
TOTAL		712,899	711,124	1,025,369	790,912	957,338	890,823	1,116,385	1,065,689

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

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

	2000	2010	2019	2020	2021	2022	2023	2024
Car derivatives								
Citroën	29,449	14,972	11,237	7,097	12,544	9,431	9,053	0
Peugeot	41,451	33,403	16,486	11,040	13,300	6,896	3,735	3,823
Opel	-	-	-	507	218	0	0	0
Stellantis (excluding FCA)	70,900	48,375	27,723	18,644	26,062	16,327	12,788	3,823
Renault Group	60,320	48,167	0 (2)	352	0 (2)	743	196	2
Total	131,220	96,542	27,723	18,996	26,062	17,070	12,984	3,825
Small vans								
Citroën	100,832	98,042	73,702	62,236	63,542	50,088	73,744	57,296
Peugeot	70,443	97,608	95,144	74,453	81,325	65,671	97,328	93,865
Opel	-	-	36,481	28,662	35,719	26,461	42,275	40,351
Miscellaneous	-	-	-	-	-	33,499	34,964	88,604
Stellantis (excluding FCA)	171,275	195,650	205,327	165,351	180,586	175,719	248,311	280,116
Renault Group	147,670	97,142	157,896	108,852	149,031	137,683	181,035	154,373
Total	318,945	292,792	363,223	274,203	329,617	313,402	429,346	434,489
Fourgons								
Citroën	61,957	67,448	107,692	91,186	107,495	103,806	91,167	77,992
Peugeot	75,023	79,241	129,929	108,658	120,359	104,892	101,845	104,622
Opel	-	-	79,028	53,082	72,113	68,983	78,751	76,467
Others	-	-	17,092	13,852	35,132	37,967	102,304	68,140
Stellantis (excluding FCA)	136,980	146,689	333,741	266,778	335,099	315,648	374,067	327,221
Renault Group	104,811	148,404	278,581	236,593	257,901	231,953	291,199	273,029
Renault Trucks	8,321	0	0	0	0	0	0	0
Sovam-Etalmobil	42	0	0	0	0	0	0	0
Total (1)	250,154	295,093	585,505	483,453	572,416	547,601	665,266	600,250
Others (Pick-ups, 4WD, various)								
Stellantis (excluding FCA)	-	-	-	1,725	4,636	5,840	4,527	26,044
Renault Group	12,580	26,697	48,918	12,535	24,609	6,910	4,262	1,081
Total	12,580	26,697	48,918	14,260	29,245	12,750	8,789	27,125
TOTAL	712,899	711,124	1,025,369	790,912	957,340	890,823	1,116,385	1,065,689

(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 as at 1 January of the year to which the data relates.

Deliveries by French manufacturers include assembled vehicles and kits of loose parts. From 2005 onwards, Dacia's deliveries outside France are included in the scope, followed by those of Renault Samsung Motors in 2007. Furthermore, certain deliveries are allocated to regions but not to countries.

The integration of Lada into the Renault Group on 1 January 2017, followed by Jinbei and Huasong on 1 January 2018, and finally Opel into the PSA Group from 1 August 2017, has had a significant impact on delivery volumes.

From 2018 onwards, the scope of deliveries has changed to align more closely with sales. In general, deliveries corresponding to production for partners are no longer included. Furthermore, reclassifications of vehicles into the 'passenger cars' and 'commercial vehicles' categories are carried out locally.

► NEW PASSENGER CARS BY DESTINATION (IN UNITS)

	2000	2005	2010	2015	2019	2023	2024
Europe (1)	**2,636,150**	**2,835,899**	**2,331,256**	**2,384,342**	**3,637,563**	**2,246,557**	**2,223,309**
European Union (2)	**2,261,904**	**2,424,350**	**1,893,455**	**1,871,647**	**2,856,938**	**1,586,735**	**1,589,112**
Germany	337,743	365,860	299,072	266,587	577,154	353,573	389,937
Austria	41,510	48,779	50,767	41,349	62,481	30,098	35,524
Belgium-Luxembourg	172,806	171,552	182,241	146,015	191,216	109,847	96,947
Denmark	30,239	34,477	27,801	49,204	56,683	27,106	19,308
Spain	556,934	577,439	302,663	310,876	425,966	245,394	233,299
Greece	54,270	32,681	10,744	12,132	29,075	38,370	28,668
Italy	353,616	377,100	317,851	304,829	497,471	380,538	378,354
Netherlands	120,438	99,707	108,951	106,236	111,309	63,679	54,078
Portugal	68,375	66,524	58,750	54,165	82,687	70,697	68,875
Sweden	31,473	43,062	16,691	32,650	30,305	23,012	19,765
Hungary	23,887	26,926	6,156	11,031	35,946	12,490	13,458
Poland	59,093	47,521	53,521	50,485	114,589	63,341	69,292
Romania	7,520	122,930	41,804	45,361	78,368	60,306	59,246
CEECs/CIS (3)	164,814	214,335	206,868	258,054	591,871	24,830	28,214
Russia	6,042	42,637	158,018	272,461	500,625	0	0
Switzerland	45,654	41,231	50,740	43,545	45,998	28,305	27,521
United Kingdom	432,507	413,743	280,244	294,142	374,872	271,451	277,541
Turkey	148,264	142,160	168,456	211,096	130,475	330,024	294,830
Africa	**69,865**	**103,130**	**171,484**	**241,078**	**238,440**	**126,907**	**133,880**
South Africa	13,913	32,941	14,711	23,223	31,375	21,988	
Maghreb	37,236	42,881	139,790	184,708	164,279	88,190	103,602
Nigeria	8,860	6,159	210	301	-	-	-
Egypt	-	-	-	-	36,207	12,597	7,081
Americas	**230,270**	**314,505**	**559,780**	**426,937**	**463,382**	**355,511**	**333,059**
Argentina	97,605	70,099	149,746	122,408	66,451	80,600	74,290
Brazil	80,205	144,030	320,930	210,638	253,873	163,624	171,170
Colombia	16,659	36,499	6,329	50,819	54,538	25,439	25,891
Mexico	1,408	39,871	24,822	10,685	28,742	44,116	31,985
Asia / Middle East (1)	**166,261**	**512,772**	**1,201,459**	**1,070,526**	**461,637**	**201,792**	**181,406**
Japan	15,976	16,323	12,346	25,072	23,403	18,574	12,758
China	54,334	143,756	392,569	756,268	135,612	61,252	45,868
Iran	45,722	304,326	516,121	38,176	-	-	-
India	-	-	4,488	50,877	88,869	57,800	49,177
South Korea	-	-	157,824	90,056	157,083	23,904	39,912
Oceania	**9,984**	**16,698**	**14,079**	**17,929**	**17,572**	**10,781**	**5,357**
Australia	2,765	11,872	9,761	13,435	10,103	6,494	2,459
TOTAL	**3 174 447**	**3 841 448**	**4 306 065**	**4 159 198**	**4 818 594**	**2 941 548**	**2 877 011**

► NEW LIGHT COMMERCIAL VEHICLES AND INDUSTRIAL VEHICLES BY DESTINATION (IN UNITS)

	2000	2005	2010	2015	2019	2023	2024
Europe (1)	**379,289**	**401,860**	**357,998**	**456,712**	**629,719**	**671,702**	**711,654**
European Union (2)	312,421	326,077	312,293	418,876	574,040	433,983	493,358
Germany	50,081	40,760	46,406	90,020	84,774	93,542	68,059
Austria	4,697	6,206	6,797	7,585	12,523	8,166	7,068
Belgium-Luxembourg	22,857	24,827	29,330	29,267	50,629	37,225	26,463
Spain	57,516	71,185	28,263	38,386	76,882	75,757	86,960
Italy	35,910	29,706	39,690	34,656	64,760	56,294	55,700
Netherlands	23,087	11,630	13,848	15,904	24,881	31,576	47,699
Portugal	34,551	25,410	18,557	15,539	14,908	13,578	6,896
10 new member states	-	24,939	28,891	44,233	-	-	-
12 then 13 new member states	-	51,099	33,784	55,213	75,250	74,397	66,062
Poland	5,624	9,039	14,258	13,563	27,234	23,815	22,534
CEEC/CIS (3)	25,100	46,685	16,121	29,981	23,740	8,777	9,161
Switzerland	4,293	5,934	8,500	7,855	10,060	11,531	8,495
United Kingdom	55,647	64,554	60,997	101,797	121,575	139,692	124,039
Turkey	-	-	-	-	11,203	71,988	72,711
Africa	**16,074**	**22,597**	**27,769**	**27,611**	**12,318**	**17,813**	**16,580**
Maghreb	13,509	18,345	24,690	26,466	9,234	13,432	13,213
America	**36,682**	**33,328**	**85,810**	**61,943**	**82,832**	**94,514**	**83,418**
Asia / Middle East (1)	**8,260**	**11,781**	**5,632**	**9,512**	**47,001**	**22,586**	**15,962**
Oceania	**1,797**	**1,967**	**2,208**	**6,064**	**6,343**	**6,098**	**5,827**
TOTAL	**444,516**	**474,532**	**480,430**	**563,013**	**778,213**	**812,713**	**833,441**

(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 2024

(IN MILLIONS OF EUROS AND BY WEIGHT)

New passenger cars		
Total	**17,160**	**100%**
Belgium	3,164	18%
Italy	2,045	12%
Germany	2,042	12%
United Kingdom	1,634	10%
Spain	1,244	7%
Netherlands	1,151	7%
Turkey	1,036	6%
Poland	499	3%
Czech Republic	475	3%
Portugal	449	3%
United States	443	3%
Algeria	401	2%
Switzerland	233	1%
Denmark	231	1%
Sweden	201	1%
Austria	137	1%
Romania	129	1%
Slovenia	123	1%
Norway	100	1%
United Arab Emirates	92	1%
Morocco	90	1%
Chile	79	0%
Egypt	74	0%
Australia	70	0%
Hungary	69	0%

New light commercial vehicles		
Total	**5,939**	**100%**
Belgium	1,174	20%
United Kingdom	973	16%
Germany	574	10%
Spain	399	7%
Poland	371	6%
Italy	369	6%
Netherlands	298	5%
Switzerland	180	3%
Australia	137	2%
Ireland	133	2%
Czech Republic	125	2%
Turkey	122	2%
Sweden	107	2%
Denmark	97	2%
Austria	86	1%
Portugal	83	1%
Hungary	81	1%
Slovenia	68	1%
Morocco	68	1%
Romania	65	1%
Mexico	46	1%
Norway	43	1%
Ukraine	41	1%
Algeria	40	1%
Saudi Arabia	36	1%

New heavy trucks, coaches and buses		
Total	**6,383**	**100%**
Germany	1,321	21%
Spain	825	13%
Italy	809	13%
United Kingdom	578	9%
Turkey	388	6%
Poland	202	3%
Algeria	177	3%
Netherlands	150	2%
Portugal	146	2%
Belgium	121	2%
Ireland	115	2%
Lithuania	114	2%
Czech Republic	110	2%
Morocco	106	2%
Switzerland	94	1%
Austria	87	1%
Australia	86	1%
Israel	67	1%
Romania	65	1%
South Korea	56	1%
Mexico	54	1%
Hungary	51	1%
New Zealand	46	1%
Chile	45	1%
Ukraine	40	1%

Total Parts and Accessories, Chassis-Bodywork, Engines, Trailers		
Total	**22,927**	**100%**
Germany	4,227	18%
Spain	3,375	15%
United Kingdom	2,075	9%
Italy	1,497	7%
Belgium	1,411	6%
Poland	1,101	5%
Turkey	855	4%
Morocco	693	3%
United States	673	3%
Romania	587	3%
Slovakia	518	2%
Sweden	515	2%
Czech Republic	504	2%
Netherlands	467	2%
Portugal	437	2%
Hungary	362	2%
Brazil	323	1%
Switzerland	295	1%
China	232	1%
Algeria	211	1%
South Korea	171	1%
India	143	1%
Austria	142	1%
Argentina	127	1%
Tunisia	117	1%

Source: Customs data processed by CCFA

PHYSICAL AND FINANCIAL DATA ON MOTOR VEHICLE MANUFACTURING

The physical and financial data were derived from the annual business surveys (EAE) in the automotive manufacturing sector. Since 2008, these have been replaced by the ESANE information system, which combines both administrative data and surveys.

These statistics are one of the main sources of information on the French industry. The SESSI, formerly the statistical service of the State Secretariat for Industry and now attached to INSEE, processes them.

These data reflect the activity of French and foreign-owned enterprises established in France, whose main activity may extend beyond France.

Business developments (creation, reorganisation, takeover, sale, changes in activities) can lead to significant year-on-year variations.

The introduction of a new economic classification, the combined use of survey data and administrative data (in particular their cross-referencing), as well as new statistical rules (principals, etc.) have led to a slight reduction in the scope of the sector between 2007 and 2008.

From 2016 onwards, INSEE has based its calculations on the concept of an enterprise as defined by Decree 2008-1354, issued pursuant to the Law on the Modernisation of the Economy (LME), which is based on the concept of a group of companies (rather than a legal entity), in order to better reflect the new economic realities brought about by globalisation. The data below, from 2012 onwards, is drawn from this new source. The changes between the old and new scopes are minor here.

	Units	2000	2010	2019	2020	2022	2023	2024 (1)
PHYSICAL DATA								
Company workforce as of 12/31 (excluding temporary workers)	units	-	137,527	120,704	116,108	111,320	108,311	105,000
Production in France (only light vehicles from 2012)	thousands	3,348	2,229	2,175	1,316	1,383	1,500	1,358
Production per person	units	17.5	16.2	18.0	11.3	12.4	13.9	12.9
FINANCIAL DATA								
Net sales	€ million	73,684	78,969	109,088	89,884	117,328	134,606	115,000
Export sales	€ million	42,290	45,526	65,199	52,468	67,964	79,997	69,000
Share of exported sales	%	57.4%	57.6%	59.8%	58.4%	57.9%	59.4%	60.0%
Value added excluding tax	€ million	13,282	10,112	12,356	9,258	12,004	14,679	12,800
Value added / sales	%	18.0%	12.8%	11.3%	10.3%	10.2%	10.9%	11.1%
Value added / per person	€ thousand	70	74	102.4	80	108	136	-
Social charges	€ million	2,153	2,302	2,317	2,135.3	2,120.9	2,404.3	-
Social charges per person	€ thousand	11.3	16.7	19.2	18.4	19.1	22.2	-
Remuneration	€ million	5,093	5,696	5,692	5,187	5,878	5,898.8	-
Remuneration per person	€ thousand	26.7	41.4	47.2	44.7	52.8	54.5	-
Staff costs	€ million	7,246	7,999	8,008	7,323	7,999	8,303.2	-
Staff costs per person	€ thousand	38.0	58.2	66.3	63.1	71.9	76.7	-
Staff costs / value added	%	54.6%	79.1%	64.8%	79.1%	66.6%	56.6%	-
Gross operating surplus	€ million	5,201	1,340	3,452	1,136	3,350	5,700.7	-
Gross operating surplus / value added	%	39.2%	13.3%	27.9%	12.3%	27.9%	38.8%	-
Financial expenses	€ million	1,178	2,862	1,648	1,878	1,594	3,067.2	-
Financial expenses / value added	%	8.9%	28.3%	13.3%	20.3%	13.3%	20.9%	-
Financial income	€ million	2,508	2,191	2,901	1,886	2,958	3,485.2	-
Financial income / value added	%	18.9%	21.7%	23.5%	20.4%	24.6%	23.7%	-
Financial result	€ million	1,330	-671	1,253	8	1,365	418	-
Financial result / value added	%	10.0%	-6.6%	10.1%	0.1%	11.4%	2.8%	-
Self-financing capacity	€ million	5,499	1,078	4,294	683	4,879	6,185.4	-
Self-financing capacity / value added	%	41.4%	10.7%	34.8%	7.4%	40.6%	42.1%	-
Taxes, duties, similar payments	€ million			944	816	713	777.5	-
Net income	€ million	2,851	293	2,117	ND	1,765	5,809	-
Net income / sales	%	3.9%	0.4%	1.9%	ND	1.5%	4.3%	-
Gross tangible investments excluding contributions	€ million	3,807	2,078	2,642	2,087	1,966	3,400.8	-
Capital expenditure / sales	%	5.2%	2.6%	2.4%	2.3%	1.7%	2.5%	-
Capital expenditure / value added	%	28.7%	20.6%	21.4%	22.5%	16.4%	23.2%	-

(1) CCFA estimates based on industrial data, INSEE and OPCO2i / Observatory of Metallurgy data.

PHYSICAL AND FINANCIAL DATA FOR AUTOMOTIVE EQUIPMENT MANUFACTURERS

The physical and financial data shown in the table below are taken from the annual business surveys (EAE) in the automotive components sector and, from 2008 onwards, from the new ESANE business information system.

In 2019, ESANE data for the 2017 financial year were produced and published for the first time at the 'enterprise' level (in the economic sense) across the entire scope. An enterprise, in the economic sense, is the smallest combination of legal units that constitutes an organisational unit for the production of goods or the provision of services, enjoying a certain degree of decision-making autonomy, particularly regarding the allocation of its current resources (Law on the Modernisation of the Economy – LME – of 4 August 2008). This definition is based on the concept of a group of companies (rather than a legal entity) and allows for better consideration of new economic realities.

From the 2013 data set up to the 2016 data set, only the largest groups were included (in 2016, around 50 of the largest groups, comprising some 100 companies). All other groups (small, medium or large) are included in the business statistics from the 2017 cohort onwards. For each of these groups, it is assumed that all the legal units within the ESANE scope that make up the group form a single enterprise. These changes explain the discrepancies observed compared with the previous edition.

In 1993, the French classification of economic activities (NAF1), harmonised within the European Union, was introduced. The reclassification of certain enterprises (metalworking, electrical equipment, car seats) into other classifications has led to a statistical break. Since 2008, this classification has evolved into NAF2, which remains harmonised at European level: in particular, manufacturers of electrical equipment for engines and vehicles, as well as manufacturers of car seats, have been added to the automotive equipment sector.

However, the companies classified in this new 'automotive equipment manufacturing' sector do not constitute the entirety of the automotive industry's suppliers. To this list should be added, in particular, producers of glass, tyres, automotive fasteners and springs, etc.

In addition to these various industrial activities, the automotive manufacturing and automotive equipment manufacturing sectors purchase numerous intermediate inputs (metals, rubber, plastics, etc.), services (consultancy, research, advertising, etc.) and capital goods from other sectors.

	Units	2000	2010	2019	2020	2022	2023	2024 (1)
PHYSICAL DATA								
Number of companies (>20p until 2007)	units	243	639	531	538	518	557	-
Company workforce as of 31/12 (excluding temporary workers)	units	-	61,759	96,701	94,025	83,866	82,968	80,100
FINANCIAL DATA								
Net sales	€ million	17,766	16,056	30,615	24,565	26,905	29,433	28,700
Export sales	€ million	7,512	7,865	15,124	13,278	13,808	15,903	15,600
Share of exported sales	%	42.3%	49.0%	49.4%	54.1%	51.3%	54.0%	54.4%
Value added excluding tax	€ million	4,643	3,885	7,832	6,432	6,499	6,831	6,700
Value added / sales	%	26.1%	24.2%	25.6%	26.2%	24.2%	23.2%	23.3%
Value added / per person	€ thousand	49	63	81	68	77	82	84
Social charges	€ million	902	937	1,841	1,664	1,682	1,789	-
Social charges per person	€ thousand	9.6	15.2	19.0	17.7	20.1	21.6	-
Remuneration	€ million	2,213	2,302	4,335	3,937	4,034	4,255	-
Remuneration per person	€ thousand	23.5	37.3	44.8	41.9	48.1	51.3	-
Staff costs	€ million	3,115	3,239	6,176	5,601	5,717	6,045	-
Staff costs per person	€ thousand	33.1	52.4	63.9	59.6	68.2	72.9	-
Staff costs / value added	%	67.1%	83.4%	78.9%	87.1%	88.0%	88.5%	-
Gross operating surplus	€ million	1,206	412	1,253	446	545	619	-
Gross operating surplus / value added	%	26.0%	10.6%	16.0%	6.9%	8.4%	9.1%	-
Financial expenses	€ million	440	177	1,998	3,037	3,787	3,555	-
Financial expenses / value added	%	9.5%	4.6%	25.5%	47.2%	58.3%	52.0%	-
Financial income	€ million	337	217	2,249	3,575	3,258	3,693	-
Financial income / value added	%	7.3%	5.6%	28.7%	55.6%	50.1%	54.1%	-
Financial result	€ million	-103	40	251	538	-529	138	-
Financial result / value added	%	-2.2%	1.0%	3.2%	8.4%	-8.1%	2.0%	-
Self-financing capacity	€ million	889	341	2,059	2,398	1,440	1,378	-
Self-financing capacity / value added	%	19.2%	8.8%	26.3%	37.3%	22.2%	20.2%	-
Taxes, duties, similar payments	€ million			412	399	297	304	-
Net income	€ million	-92	-17	644	252	-585	67	-
Net income / sales	%	-0.5%	-0.1%	2.1%	1.0%	-2.2%	0.2%	-
Gross tangible investments excluding contributions	€ million		413	1,106	837	767	864	-
Capital expenditure / sales	%	5.8%	2.6%	3.6%	3.4%	2.9%	2.9%	-
Capital expenditure / value added	%	22.0%	10.6%	14.1%	13.0%	11.8%	12.6%	-

(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	2010	2019	2020	2021	2022	2023	2024
Alpine	-	-	3,172	744	1,618	2,138	2,693	2,840
Dacia	-	104,641	138,977	97,170	125,204	130,855	156,390	144,979
Renault	602,415	497,820	407,134	314,630	268,951	236,405	277,914	277,297
Mobilize	-	-	-	-	-	34	5	0
Renault Group	**602,415**	**602,461**	**549,283**	**412,544**	**395,773**	**369,432**	**437,002**	**425,116**
Citroën	261,508	301,607	235,110	162,688	161,883	129,883	125,932	111,536
DS	-	26,539	26,845	22,182	22,782	20,959	23,372	18,024
Opel (1)	-	-	66,901	43,801	37,393	36,052	43,237	40,007
Peugeot	397,547	400,663	379,582	301,935	285,929	245,608	241,512	232,713
PSA Group (Stellantis from 17 January 2021)	**659,055**	**728,809**	**708,438**	**530,606**	**-**	**-**	**-**	**-**
Alfa Romeo	12,774	13,033	3,938	2,372	1,541	3,090	3,909	4,373
Fiat	95,983	72,717	71,666	42,360	39,914	36,508	40,336	32,770
Jeep	3,001	1,177	11,541	6,381	10,822	5,727	7,452	11,790
Lancia	5,864	3,368	1	0	0	0	0	132
Maserati	-	162	420	135	135	136	138	139
FCA Group (Stellantis from 17 January 2021)	**122,449**	**91,337**	**87,566**	**51,248**	**-**	**-**	**-**	**-**
Stellantis	**-**	**-**	**-**	**-**	**560,399**	**477,963**	**485,888**	**451,484**
Bolloré	-	0	1	0	0	0	0	0
Miscellaneous France	63	56	121	73	87	142	68	73
Total Renault Group and Stellantis (2) & French brands	**1,261,533**	**1,331,326**	**1,257,843**	**943,223**	**956,259**	**847,537**	**922,958**	**876,673**
Audi	34,937	50,936	57,532	45,360	50,083	43,687	49,422	47,917
BMW	31,576	46,074	58,751	45,478	45,969	45,439	59,601	67,147
BYD	-	-	-	-	-	-	520	5,415
Cupra	-	-	-	236	4,006	7,555	14,946	17,549
Ford	117,061	114,810	78,838	55,219	43,777	47,095	51,648	43,623
Honda	8,716	11,251	8,196	5,802	5,374	5,438	4,881	4,368
Hyundai	11,019	18,785	39,970	34,585	45,241	47,106	49,400	45,451
Jaguar	1,939	1,126	3,561	1,309	1,718	1,093	1,008	517
Kia	2,631	24,055	45,056	39,052	44,215	46,224	49,192	43,861
Land Rover	7,570	2,735	7,878	5,456	6,078	4,372	6,918	10,628
Leapmotor	-	-	-	-	-	2	510	330
Lexus	-	1,921	7,159	5,913	4,704	3,256	5,675	7,203
Lynk Co	-	-	-	-	300	3,098	3,307	519
Mazda	6,366	10,232	12,596	8,890	9,482	7,040	10,095	8,608
Mercedes-Benz	43,389	45,612	70,214	52,570	50,789	47,977	51,836	51,267
M.G.	-	-	-	656	4,619	12,666	33,374	24,599
Mini	-	18,007	27,158	21,881	25,337	25,649	28,187	19,566
Mitsubishi	5,575	3,514	7,207	5,012	1,967	2,439	2,665	4,153
Nissan-Infiniti	31,330	54,351	42,439	32,964	26,414	27,169	36,450	28,371
Opel (1)	133,576	94,877	-	-	-	-	-	-
Porsche	825	2,073	5,572	4,878	4,487	3,857	3,505	6,573
Seat	40,562	30,645	37,148	26,676	26,687	13,684	17,879	22,363
Seres	-	-	-	-	26	321	230	36
Skoda	11,570	18,533	36,498	29,875	30,399	28,904	38,257	44,501
Smart	6,645	6,408	10,494	1,692	1,602	1,341	2,024	2,216
Ssangyong	19	451	157	177	120	18	2	0
Subaru	2,312	1,146	510	125	67	28	37	62
Suzuki	11,355	22,070	30,758	19,651	22,907	14,750	21,866	24,093
Tesla	-	11	7,442	7,372	26,446	29,199	63,041	40,709
Toyota	43,698	65,390	101,730	89,727	96,170	100,268	107,950	127,519
Volkswagen	152,868	146,538	149,105	97,784	105,298	97,292	120,225	119,360
Volvo	6,777	11,841	21,696	16,412	17,285	13,515	14,989	19,793
Xpeng	-	-	-	-	-	-	-	511
Total Others (3)	**872,351**	**920,342**	**956,436**	**706,895**	**702,745**	**681,498**	**851,769**	**841,743**
TOTAL	**2,133,884**	**2,251,668**	**2,214,279**	**1,650,118**	**1,659,004**	**1,529,035**	**1,774,727**	**1,718,416**
including Temporary Transit	-	39,011	30,326	11,826	14,361	14,452	20,988	21,281
Renault Group and Stellantis (2) & French brands as a %	**59.1%**	**59.1%**	**56.8%**	**57.2%**	**57.6%**	**55.4%**	**52.0%**	**51.0%**
Total Others (3) as a %	**40.9%**	**40.9%**	**43.2%**	**42.8%**	**42.4%**	**44.6%**	**48.0%**	**49.0%**

(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	2010	2019	2020	2021	2022	2023	2024
TOTAL	**5,082,122**	**5,386,007**	**5,790,612**	**5,569,298**	**6,016,321**	**5,204,976**	**5,195,565**	**5,354,169**
Used/new ratio	2.4	2.4	2.6	3.4	3.6	3.4	2.9	3.1

► REGISTRATIONS OF USED LIGHT COMMERCIAL VEHICLES (IN UNITS)

	2000	2010	2019	2020	2021	2022	2023	2024
TOTAL	**651,033**	**806,398**	**817,285**	**799,287**	**896,509**	**814,352**	**842,033**	**851,870**
Used/new ratio	1.6	1.9	1.7	2.0	2.1	2.3	2.2	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	2019	2020	2021	2022	2023	2024
Dacia	0	0	0	1,722	11,386	18,326	29,761	5,144
Renault	13	10,408	18,817	39,672	32,455	40,430	32,444	49,204
Renault Group	13	10,408	18,817	41,394	43,841	58,756	62,205	54,348
Citroën	27	397	727	2,036	2,991	4,435	5,287	14,821
DS	0	0	111	2,710	1,806	1,755	2,039	1,306
Peugeot	30	725	628	19,583	23,706	26,751	29,121	39,947
Opel (1)	-	-	0	2,171	3,424	4,987	6,533	9,090
PSA Group (before 01/17/2021)	57	1,122	1,466	26,500	-	-	-	-
Alfa Romeo	0	0	0	0	0	0	0	0
Chrysler-Dodge-Jeep	0	0	0	0	0	0	1,518	4,517
Fiat - Abarth	0	0	0	1,761	9,556	15,269	25,190	20,618
FCA Group (before 01/17/2021)	0	0	0	1,761	-	-	-	-
Groupe Stellantis	-	-	-	-	41,483	53,197	69,688	90,299
Total Renault Group and Stellantis (2) & French brands	7	11,530	20,283	67,894	85,324	111,953	131,893	144,647
Audi	0	0	453	803	1,369	3,034	4,222	5,262
BYD	0	2	0	0	0	0	520	3,408
BMW	0	279	2,793	1,741	2,346	3,361	8,667	16,922
Cupra	0	0	0	0	59	1,349	3,224	4,864
Ford	0	1	0	20	762	704	2,496	2,737
Hyundai	0	0	2,066	5,944	6,744	8,963	8,675	5,874
Kia	0	485	2,244	5,930	8,489	7,483	9,158	4,816
Leap Motor	0	0	0	0	0	2	510	330
M.G.	0	0	0	656	2,106	7,120	26,835	11,472
Mercedes-Benz	0	93	91	554	1,511	2,597	4,248	5,347
Mini	50	0	0	2,481	5,141	5,809	7,634	6,256
Nissan-Infiniti	0	2,298	3,893	3,512	3,582	2,693	1,732	1,292
Porsche	0	0	0	527	681	614	592	1,638
Skoda	0	0	0	599	2,193	2,321	4,212	6,158
Smart	34	336	2,219	1,687	1,602	1,341	2,024	2,216
Tesla	11	708	7,442	7,372	26,446	29,199	63,041	40,709
Toyota-Lexus	0	0	0	2	274	216	798	2,233
Volkswagen	0	291	828	7,480	10,518	10,727	12,544	14,057
Volvo	0	0	0	134	476	2,307	3,733	7,955
Xpeng	0	0	0	0	0	0	0	511
Total Others (3)	113	5,738	22,481	43,022	76,782	90,976	166,326	145,967
TOTAL	183	17,268	42,764	110,916	162,106	202,929	298,219	290,614
Share of electric registrations	0.0%	0.9%	1.9%	6.7%	9.8%	13.3%	16.8%	16.9%
Renault Group & Stellantis (2) & French brands as a %	38.3%	66.8%	47.4%	61.2%	52.6%	55.2%	44.2%	49.8%
Total others as a %	61.7%	33.2%	52.6%	38.8%	47.4%	44.8%	55.8%	50.2%

► REGISTRATIONS OF NEW PLUG-IN HYBRID PASSENGER CARS (IN UNITS)

	2010	2015	2019	2020	2021	2022	2023	2024
Renault	0	0	0	6,281	11,879	4,120	1,569	1,089
Renault Group	0	0	0	6,281	11,879	4,120	1,569	1,090
Citroën	0	0	0	3,119	7,116	8,500	9,120	3,632
DS	0	0	203	4,535	6,608	7,352	11,269	6,920
Peugeot	0	0	0	6,281	11,879	4,120	1,569	1,089
Opel (1)	-	-	1	945	822	930	2,298	1,333
PSA Group (before 01/17/2021)	0	0	204	14,880	-	-	-	-
Alfa Romeo	0	0	0	0	0	0	1,386	758
Chrysler-Dodge-Jeep	0	0	0	1,475	5,639	3,846	3,091	1,670
FCA Group (before 01/17/2021)	0	0	0	1,475	-	-	-	-
Stellantis	-	-	-	-	32,064	24,748	28,733	15,402
Total Renault Group and Stellantis (2) & French brands	0	0	204	21,161	43,943	28,868	30,302	16,492
Audi	0	1,129	312	4,689	9,657	6,794	11,204	13,799
BMW-Mini	0	846	4,089	8,817	13,273	15,381	20,679	17,505
BYD	0	0	0	0	0	0	0	2,007
Cupra	0	0	0	25	2,066	814	5,250	8,092
Ford	0	0	0	2,092	3,826	1,513	2,690	1,643
Hyundai	0	0	723	693	5,322	5,766	4,519	2,407
Jaguar - Land Rover	0	0	1,889	2,225	3,994	2,989	6,239	10,778
Kia	0	0	1,054	1,572	3,932	7,657	6,165	4,333
Lynk Co	0	0	0	0	300	3,098	3,307	519
M.G.	0	0	0	0	2,513	2,415	2,634	1,349
Mazda	0	0	0	0	0	388	1,379	1,458
Mercedes-Benz	0	152	943	11,111	18,018	17,026	20,485	24,372
Mitsubishi	0	907	3,118	2,642	809	1,522	982	1,878
Porsche	0	505	1,442	2,411	2,762	2,434	1,892	4,226
Seat	0	0	0	753	1,083	22	378	181
Skoda	0	0	0	693	1,351	635	1,096	1,093
Suzuki	0	0	0	190	293	428	801	343
Toyota-Lexus	82	68	288	232	1,306	2,217	3,507	6,050
Volkswagen	0	1,850	563	3,551	5,972	4,054	9,574	8,445
Volvo	0	125	3,806	7,167	10,636	6,843	7,784	7,725
Total others (3)	82	5,589	18,388	53,431	102,697	101,525	137,125	132,334
TOTAL	82	5,589	18,592	74,592	141,001	126,547	162,950	146,398
Share of plug-in hybrid registrations	0.0%	0.3%	0.8%	4.5%	8.5%	8.3%	9.2%	8.5%
Renault Group & Stellantis (2) & French brands as a %	0.0%	0.0%	1.1%	28.4%	27.2%	19.8%	15.8%	9.6%
Total Others (3) as a %	100.0%	100.0%	98.9%	71.6%	72.8%	80.2%	84.2%	90.4%

(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 21/31/2017.
(2) Excluding FCA before 2021.
(3) Including various and FCA (before 2021).
Source: CCFA

REGISTRATIONS

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

	2000	2010	2019	2020	2021	2022	2023	2024
Dacia	0	5,434	1,572	1,206	1,200	1,284	1,802	2,095
Renault	139,752	135,591	147,826	121,837	124,737	99,572	112,570	114,585
Renault Group	**139,752**	**141,025**	**149,398**	**123,043**	**125,937**	**100,856**	**114,372**	**116,680**
Citroën	77,048	70,579	74,026	60,937	66,596	55,114	55,075	50,965
DS	0	259	179	200	144	111	94	87
Peugeot	74,950	72,228	85,360	70,643	76,833	59,457	63,783	67,508
Opel (1)	-	-	7,442	7,448	9,169	7,286	8,639	7,977
PSA Group (Stellantis from 01/17/2021)	**151,998**	**143,066**	**167,007**	**139,228**	**-**	**-**	**-**	**-**
Fiat	25,253	34,659	37,572	33,333	35,610	20,295	19,686	19,662
Jeep	-	287	1,794	630	275	354	139	251
FCA Group (Stellantis from 01/17/2021)	**25,253**	**34,946**	**39,366**	**33,963**	**-**	**-**	**-**	**-**
Stellantis	**-**	**-**	**-**	**-**	**188,627**	**142,617**	**147,416**	**146,450**
Miscellaneous France	40	528	869	640	678	1,019	1,246	851
Total Renault Group & Stellantis (2) & other French brands	**291,790**	**284,619**	**317,274**	**262,911**	**314,564**	**243,473**	**261,788**	**263,130**
Audi	-	3,223	810	623	472	362	309	245
BMW	-	1,600	383	280	291	207	237	205
Ford	18,110	20,437	32,798	28,170	29,397	27,130	33,680	32,180
Fuso	-	0	655	807	1,221	1,232	1,172	1,097
Hyundai	588	237	347	247	341	403	604	303
Isuzu	108	1,961	2,495	932	1,840	2,253	1,894	3,072
IVECO	16,534	11,610	17,030	14,309	17,492	15,469	14,484	13,665
Kia	-	142	175	145	248	225	223	279
Land Rover	1,857	1,550	625	431	595	479	694	559
MAN	-	-	1,763	1,795	2,465	2,311	2,489	3,097
Mercedes-Benz	23,139	19,051	23,385	23,301	22,890	19,073	18,115	20,357
Mitsubishi	3,392	2,639	1,757	1,516	1,424	642	12	11
Nissan	5,197	7,307	8,167	6,117	7,859	5,832	6,070	7,416
Opel (1)	7,561	7,195	-	-	-	-	-	-
Seat	-	435	567	436	757	277	282	390
Skoda	-	715	497	719	702	570	1,662	1,154
Suzuki	-	457	734	1,056	2,439	1,961	3,012	2,369
Toyota	1,771	4,013	8,542	6,712	9,815	9,543	12,722	12,466
Volkswagen	13,819	13,249	21,182	16,941	16,387	14,556	16,926	16,719
Total others (3)	**123,176**	**132,993**	**162,474**	**139,469**	**118,063**	**104,603**	**117,442**	**118,725**
TOTAL	**414,966**	**417,612**	**479,748**	**402,380**	**432,627**	**348,076**	**379,230**	**381,855**
Renault Group & Stellantis (2) & other French brands as a %	**70.3%**	**68.2%**	**66.1%**	**65.3%**	**72.7%**	**69.9%**	**69.0%**	**68.9%**
Total Others (3) as a %	**29.7%**	**31.8%**	**33.9%**	**34.7%**	**27.3%**	**30.1%**	**31.0%**	**31.1%**

(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	2010	2019	2020	2021	2022	2023	2024
Renault Trucks	20,818	10,908	15,308	11,770	13,064	12,873	13,185	14,574
Total Renault Trucks and miscellaneous France	**20,992**	**10,964**	**15,323**	**11,783**	**13,066**	**12,876**	**13,192**	**14,576**
DAF	4,365	4,464	7,295	5,599	5,519	6,263	6,606	6,482
IVECO	6,998	4,003	4,248	4,044	4,063	3,741	4,427	4,516
MAN	3,498	2,729	6,095	4,128	4,516	3,973	4,538	4,042
Mercedes-Benz	9,976	5,229	7,513	5,674	5,721	5,873	6,325	5,592
Scania	4,963	2,553	7,038	4,770	5,026	4,242	5,676	6,215
Volvo	6,739	3,938	7,018	5,131	5,611	6,143	6,752	6,575
Total miscellaneous	**36,924**	**23,257**	**39,892**	**29,946**	**31,072**	**31,134**	**35,663**	**34,406**
TOTAL	**57,916**	**34,221**	**55,215**	**41,729**	**44,138**	**44,010**	**48,855**	**48,982**
Renault Trucks and miscellaneous France as a %	**36.2%**	**32.0%**	**27.8%**	**28.2%**	**29.6%**	**29.3%**	**27.0%**	**29.8%**
Total miscellaneous as a %	**63.8%**	**68.0%**	**72.2%**	**71.8%**	**70.4%**	**70.7%**	**73.0%**	**70.2%**

► REGISTRATIONS OF USED INDUSTRIAL VEHICLES (OVER 5 TONNES) (IN UNITS)

	2000	2010	2019	2020	2021	2022	2023	2024
TOTAL	**59,056**	**56,142**	**53,571**	**49,825**	**50,820**	**52,268**	**52,123**	**51,745**
Used/new ratio	1.0	1.6	1.0	1.2	1.2	1.2	1.1	1.1

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

	2000	2010	2019	2020	2021	2022	2023	2024
Renault	1,633	0	0	1	1	1	0	0
IVECO BUS (1)	-	2,412	2,862	2,731	3,313	2,981	2,889	2,988
Daimler Buses (2)	863	1,433	1,444	1,599	1,048	791	1,206	1,166
Groupe VGF (3)	-	559	942	674	1,131	765	730	590
Bova	-	116	0	0	0	1	2	3
Temsa	-	309	150	191	241	178	194	266
Van Hool	230	169	157	96	21	49	60	36
Yutong	-		20	8	7	60	10	19
Irizar	-	0	202	27	119	68	98	130
Isuzu	-	0	122	61	173	149	145	137
Otokar	-	105	193	201	147	190	171	196
Miscellaneous	367	279	325	203	303	200	191	271
TOTAL	**4,320**	**5,382**	**6,417**	**5,791**	**6,503**	**5,432**	**5,696**	**5,802**

(1) IVECO BUS: IVECO and IVECO BUS, Irisbus, Heuliez.
(2) Setra and Mercedes-Benz (Evobus until 11 July 2023).
(3) VGF: MAN and Neoplan, then Scania from 2015.

MOTORISATION

► AUTOMOBILE DENSITY IN EUROPE

NUMBER OF PRIVATE CARS PER 1000 INHABITANTS

	2015	2019	2020	2021	2022	2023
Germany	555	575	580	584	586	582
Belgium	497	508	506	506	506	508
Spain	481	533	531	535	540	541
France	564	573	572	573	572	576
Greece	470	489	496	506	525	539
Hungary	324	390	401	413	422	434
Italy	614	661	666	672	681	694
The Netherlands	493	517	520	523	525	529
Poland	-	482	490	517	529	545
Portugal	437	504	511	520	534	547
Czech Republic	490	562	573	588	611	609
Romania	259	355	376	396	413	425
Sweden	479	478	479	480	477	473
EUROPEAN UNION	-	541	545	553	559	563
Norway	502	520	521	520	530	519
Switzerland	547	535	549	551	546	545
EFTA	529	532	540	541	542	538
Russia	284	308	312	-	-	-
Turkey	136	152	158	162	168	178
United Kingdom	517	528	546	548	548	553
EUROPE	-	460	466	-	-	-

Source: ACEA, Vehicles in use in Europe, January 2025; CCFA calculations for Turkey and Russia from 2021 onwards

► VEHICLES IN USE (AS OF 1 JANUARY 2025) (IN THOUSANDS)

	All energies	Diesel	Others
Passenger cars (PC)			
5 CV & less	19,333	9,341	9,992
6 CV to 10 CV	18,126	8,758	9,368
11 CV & more	2,279	1,101	1,178
Total PC	39,739	19,201	20,538
Light commercial vehicles (LCV)			
Less than 2.5t	2,802	2,387	415
From 2.5t to 3.5t	3,735	3,665	71
From 3.6t to 5t	193	137	56
Total LCV up to 5t (1)	6,730	6,188	542
Total light vehicles (PC + LCV)	46,469	25,389	21,080
Heavy trucks over 5t			
Rigids			
From 5.1t to less than 12t	80	78	2
From 12t to less than 20t	152	148	4
20t & more	166	162	4
Total rigids	398	388	11
Road tractors	223	216	7
Total heavy trucks	622	604	18
Coaches and buses	95	78	16
Total commercial vehicles over 3.5t	716	682	34
Total commercial vehicles all tonnages	7,446	6,870	576
Total all vehicles	47,185	26,071	21,114

(1) Including unknown weights.
Source: MTE/SDES, CCFA estimates

► MOTORISATION

	unit	2000	2010	2015	2019	2020	2023	2024
Households without a car	%	19.7%	16.5%	17.1%	15.0%	14.8%	15.7%	15.3%
Households with a car	%	80.3%	83.5%	82.9%	85.0%	85.2%	84.3%	84.7%
Households with one car	%	50.7%	47.6%	48.4%	48.3%	48.2%	48.3%	49.6%
Households with two cars	%	25.4%	30.7%	29.4%	31.5%	31.7%	31.0%	30.5%
Households with three or more cars	%	4.2%	5.2%	5.1%	5.2%	5.3%	5.0%	4.6%
Average vehicle age	year	7.25	8.0	8.9	8.9	9.0	9.8	10.1
Average length of ownership	year	4.43	5.0	5.5	5.5	5.6	6.3	6.4
Second-hand private cars	%	56.1	58.9	58.5	58.0	59.0	59.3	60.2
Average annual mileage (total)	km	13,670	12,240	11,710	11,900	9,730	10,840	10,810
Average annual mileage (petrol)	km	11,690	8,440	8,030	8,850	7,190	8,870	8,970
Average annual mileage (diesel)	km	18,240	14,720	13,990	14,410	11,950	13,060	12,880
Domestic passenger traffic (1)								
In private cars	billions pass.-km	826.6	841.1	858.9	892.2	717.2	853.4	855.7
In coaches and buses	billions pass.-km	45.4	53.9	58.5	60.4	37.6	53.2	54.4
Total traffic	billions pass.-km	966.8	1,009.4	1,036.4	1,078.1	824.2	1,036.8	1,046.6
Share of road traffic in total traffic	%	90.2	88.7	88.5	88.4	91.6	87.4	87.0
Annual change in traffic								
In private cars	% var/n-1	-0.1	0.8	1.1	1.1	-19.6	-1.5	0.3
In coaches and buses	% var/n-1	2.7	2.2	1.6	2.8	-37.7	11.9	2.3

(1) Data on domestic traffic may be revised annually.
Sources: KANTAR TNS PARC AUTO and MTE/SDES

► CAR FLEET AS OF 1 JANUARY BY ENGINE TYPE (IN THOUSANDS)

	2015	2020	2024	2025
Electric and Hydrogen	26	142	869	1,134
Petrol	12,841	14,956	15,966	16,068
Diesel	23,429	22,612	19,942	19,201
Gas	178	146	291	336
Plug-in hybrid	31	85	577	711
Non-rechargeable hybrid	123	481	1,711	2,287
Others	4	3	2	2
All	36,632	38,424	39,358	39,739

► CAR FLEET ON 1 JANUARY ACCORDING TO THE CRIT'AIR STICKER (IN THOUSANDS)

	2015	2020	2024	2025
Crit'Air E	26	142	869	1,134
Crit'Air 1	2,855	8,490	13,017	14,178
Crit'Air 2	9,248	13,550	14,084	13,904
Crit'Air 3	12,178	9,935	7,622	7,122
Crit'Air 4	5,332	3,670	2,294	2,064
Crit'Air 5	1,880	960	487	430
Unknown and unclassified	5,112	1,677	985	907
All	36,632	38,424	39,358	39,739

Source: MTE/SDES

POLLUTING EMISSIONS AND CO_2

► EVOLUTION OF EMISSIONS IN METROPOLITAN FRANCE BETWEEN 1990 AND 2024

	1990	2000	2010	2019	2020	2023	2024	Variation 2024/1990	Variation 2024/2023
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%	-0.5%
CO	5,594	2,359	693	275	199	209	211	-96%	+0.6%
NOx	1,180	916	589	379	299	280	259	-78%	-7.3%
NMVOC	894	424	113	44	34	30	29	-97%	-3.6%
Lead (in tonnes)	3,893	39	40	39	36	35	35	-99%	+0.8%
PM10: particles	74	68	45	27	22	22	21	-71%	-2.0%
OTHER EMISSIONS FROM ROADS (In millions of tonnes)									
CO_2 net of CO_2 emissions from renewable energies	114	131	126	123	104	116	115	+0.5%	-1.1%
CO_2 issu de la combustion de la biomasse	0	1	7	9	7	8	8	-	-1.0%

Source: CITEPA/Secten data 2025 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	2023	2024	As a % of the total excluding LULUCF (1) in 2024
Energy transformation	68.8	63.5	59.1	39.5	34.7	32.0	28.3	11
	17%	16%	16%	12%	12%	12%	11%	-
Manufacturing industry	107.3	106.7	88.0	73.7	65.7	59.6	58.7	22
	27%	26%	23%	23%	23%	22%	22%	-
Waste treatment	1.8	1.3	1.3	1.5	1.5	1.1	1.1	0
	0%	0%	0%	0%	1%	0%	0%	-
Residential/tertiary	85.4	86.3	87.8	65.3	61.8	48.2	47.7	18
	22%	21%	23%	21%	22%	18%	18%	-
Agriculture/forestry	11.6	12.6	12.1	10.9	11.9	11.1	11.5	4
	3%	3%	3%	3%	4%	4%	4%	-
Transport	119.8	136.9	128.8	125.4	105.8	118.2	116.8	44
	30%	34%	34%	40%	38%	44%	44%	-
of which road	112.1	128.0	122.3	119.1	101.0	112.6	111.3	42
	28%	31%	32%	38%	36%	42%	42%	-
of which other transport	7.6	8.9	6.4	6.3	4.8	5.6	5.5	2
	2%	2%	2%	2%	2%	2%	2%	-
TOTAL EXCLUDING LULUCF (1)	394.8	407.3	377.0	316.2	281.5	270.2	264.2	100
LULUCF (1)	-28.1	-32.1	-45.6	-39.6	-42.2	-41.7	-41.8	-
TOTAL WITH LULUCF (1)	366.7	375.2	331.4	276.6	239.3	228.5	222.4	-

(1) LULUCF: Land Use, Land Use Change and Forestry.
Source: CITEPA/CORALIE/Secten format 2025 edition

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

	2000	2010	2015	2019	2021 (1)	2022	2023	2024	2024/2023
FRANCE									
Petrol	168	130	116	116	-	-	-	-	-
Diesel	155	130	111	113	-	-	-	-	-
TOTAL FRANCE	162	130	111	112	109	103.1	96.8	94.1	-2.7
EUROPEAN UNION									
Italy	161	134	115	-	125	119.2	120.1	119.8	-0.3
Spain	162	140	115	-	127	121.5	117.5	117.6	0.1
United Kingdom	180	145	121	-	-	-	-	-	-
Germany	179	152	128	-	114	105.9	113	117.1	4.1
AVERAGE EU 15 COUNTRIES	171	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.
Sources: EEA (European Environment Agency) from 2022 onwards, ADEME.

TAX RESOURCES FROM THE AUTOMOBILE INDUSTRY

► CONSUMPTION, PRICES AND TAXES ON ROAD FUELS

	UNITS	2000	2010	2019	2020	2021	2022	2023	2024
FUEL CONSUMPTION									
Petrol	millions of litres	14,329	10,880	11,296	9,759	11,805	13,058	13,747	14,719
Unleaded petrol 98	millions of litres	7,138	2,202	2,449	2,260	2,703	2,570	2,674	2,928
Unleaded petrol 95	millions of litres	7,191	7,299	3,466	2,412	2,576	2,320	2,179	2,099
Unleaded petrol 95-E10	millions of litres	-	1,379	5,381	4,734	6,058	7,314	7,998	8,805
	as % of total petrol	-	12.7%	47.6%	48.5%	51.3%	56.0%	58.2%	59.8%
Ethanol-petrol blend E85		-	-	-	353	467	854	895	888
Diesel	millions of litres	32,373	39,749	39,019	32,803	36,356	36,233	34,257	33,092
TOTAL ROAD FUELS	millions of litres	46,703	50,629	50,316	42,562	48,161	49,292	48,003	47,811

Source: CPDP

	UNITS	2000	2010	2019	2020	2021	2022	2023	2024
FUEL PRICES AT THE PUMP (annual average)									
Unleaded petrol 98	euros/litre	1.11	1.38	1.57	1.42	1.61	1.86	1.94	1.88
Taxes as a %	%	69	60	61	65	60	54	52	53
Unleaded petrol 95-E10	euros/litre	-	-	1.48	1.34	1.53	1.77	1.86	1.78
Taxes as a %	%	-	-	62	67	61	55	53	54
Superethanol E85	euros/litre	-	-	-	0.66	0.68	0.80	1.06	0.84
Taxes as a %	%	-	-	-	35	34	32	28	31
Petrol	euros/litre	1.11	1.35	1.51	1.34	1.52	1.73	1.83	1.75
Taxes as a %	%	70	61	62	66	60	54	52	54
Diesel	euros/litre	0.85	1.15	1.44	1.26	1.43	1.85	1.79	1.69
Taxes as a %	%	62	54	59	65	59	50	51	53

Source: DGEC

► TAX RESOURCES FROM THE AUTOMOBILE INDUSTRY (IN MILLIONS OF EUROS)

	2000	2010	2015	2019	2020	2022	2023 (p)	2024 (p)
Taxes on petroleum products for road use (including VAT)	30,630	32,324	36,294	43,070	35,159	41,678	46,269	43,181
Vehicle registration certificates (grey cards)	1,373	1,917	2,086	2,296	2,091	1,891	2,033	3,122
Annual tax on parking areas	-	-	59	70	76	76	79	84
Vehicle insurance taxes	3,429	4,126	4,662	5,269	5,406	5,714	5,979	6,386
Traffic taxes (vignettes)	539	0	0	0	0	0	0	0
Taxes on company cars	644	992	753	768	801	693	642	991
Axle taxes	223	168	169	167	171	166	150	154
Fixed police and traffic fines	720	1,255	1,562	1,578	1,316	1,803	2,006	1,999
Taxes on driving licenses	14	1	11	10	10	10	0	0
Taxes on regional planning	442	539	574	640	530	615	671	797
Road and transport investment fund (DOM)	-	1	1	0	0	1	1	0
Domanial royalties	132	186	326	355	365	367	401	422
General tax on polluting activities (TGAP) (1)	-	500	600	426	505	998	1,517	1,049
VAT on acquisition expenses (passenger cars)	6,603	8,171	8,709	10,886	8,519	8,978	10,866	11,030
VAT on repairs, maintenance, technical inspections, garages and driving licenses (passenger cars)	4,324	7,133	8,081	9,875	9,102	11,000	11,798	12,381
Tax resources from the automobile industry (including VAT)	49,073	57,313	63,888	75,410	64,052	73,990	82,413	81,595
including specific automobile taxation		37,300	40,800	47,494	42,100	47,813	50,261	47,364
including specific taxation on fuels: TICPE and VAT on TICPE		28,200	31,500	37,594	32,400	36,659	35,612	35,465
ADDITIONAL INFORMATION (In millions of euros)								
Freeway tolls (excl. VAT)	4,457	8,110	9,390	10,860	9,000	11,610	12,300	12,820
Freeway tolls (incl. VAT)	5,330	9,700	11,268	13,032	10,800	13,932	14,760	15,384
Total APU (2) expenditure on roads	-	16,500	14,600	14,300	14,100	15,102	14,669	17,301

(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.
(p) Provisional figures.
Sources: General Directorate of Taxes, CCFA, URF, MTE/SDES, National Transport Accounts Commission

USEFUL ADDRESSES

► FRENCH AUTOMOTIVE MANUFACTURERS

Stellantis
2, boulevard de l'Europe
78300 Poissy
Tel.: 01 61 45 45 45
www.stellantis.com/fr

Renault Group
122-122 bis, avenue du Général Leclerc
92100 Boulogne Billancourt cedex
Tel.: 01 76 84 50 50
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99, route de Lyon
69800 St Priest
Tel.: 04 69 09 60 00
www.renault-trucks.fr

Alpine-Renault
40, avenue de Bréauté
76885 Dieppe cedex
Tel.: 01 76 86 31 50
www.alpinecars.com

►AUTOMOTIVE PROFESSIONAL ORGANISATIONS IN FRANCE

Fédération Française de Carrosserie Industries et Services (FFC)
Immeuble Le Cardinet
8, rue Bernard Buffet
75017 PARIS
Tel.: 01 44 29 71 00
www.ffc-carrosserie.org

Chambre Syndicale Internationale de l'Automobile et du Motocycle (CSIAM)
5, square de l'Avenue du Bois
75016 Paris
Tel.: 01 53 64 50 30
www.csiam-fr.org

MOBILIANS
43 bis, route de Vaugirard
CS 80016
92197 Meudon
Tel.: 01 40 99 55 00
www.mobilians.fr

Fédération des Industries d'Équipements pour Véhicules (FIEV)
2, rue de Presbourg
75008 Paris
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)
2, rue de Presbourg
75008 Paris
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
Tel.: 01 40 54 20 20
www.uimm.fr

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)
Autodrome de Linas-Monthléry
91310 Linas
Tel.: 01 69 80 17 00
www.utacceram.com

► INTERNATIONAL AUTOMOTIVE ORGANISATIONS

Association des Constructeurs Européens d'Automobiles (ACEA)
Rond-Point Schuman 6
1040 Bruxelles (Belgique)
Tel.: 00 32 2 732 55 50
www.acea.auto

Organisation Internationale des Constructeurs d'Automobiles (OICA)
4, rue de Berri
75008 Paris
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www.oica.net

► AUTOMOTIVE ASSOCIATIONS IN FRANCE

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Tel.: 09 70 40 11 11
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75008 Paris
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www.automobile-club.org

Fédération Française du Sport Automobile (FFSA)
32, avenue de New-York
75781 Paris Cedex 16
Tel.: 01 44 30 24 00
www.ffsa.org

Association Prévention Routière
33, rue de Mogador
75009 Paris
Tel.: 01 44 15 27 00
www.preventionroutiere.asso.fr

Société des Ingénieurs de l'Automobile (SIA)
2, rue de Presbourg
75008 Paris
Tel.: 01 41 44 93 70
www.sia.fr

AUTOMOTIVE RESEARCH ORGANISATIONS IN FRANCE

Association nationale pour le développement de la mobilité électrique France (AVERE France)
5, rue Helder
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
Tel.: 01 47 40 59 50
www.gerpisa.org

ID4MOBILITY
40 rue de la tour d'Auvergne
La Halle 6 Est
44200 Nantes
Tél. : 02 52 59 59 19
www.id4mobility.org

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

Institut Français des Sciences et Technologies des Transports, de l'Aménagement et des Réseaux (IFSTTAR)
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
69008 Lyon
Tel.: 04 51 08 40 20
www.cara.eu

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Innovapôle 76
50, rue Ettore Bugatti
76800 Saint-Etienne du Rouvray
Tél. : 02 35 65 78 17
www.nextmove.fr

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Head office: Centre d'affaires Technoland
15, rue Armand Japy
25461 Etupes Cedex
General Secretary: Technopole de Mulhouse
40, rue Marc Seguin
68060 Mulhouse Cedex
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The CCFA provides statistics and information on the automotive world, available on its website www.ccfa.fr
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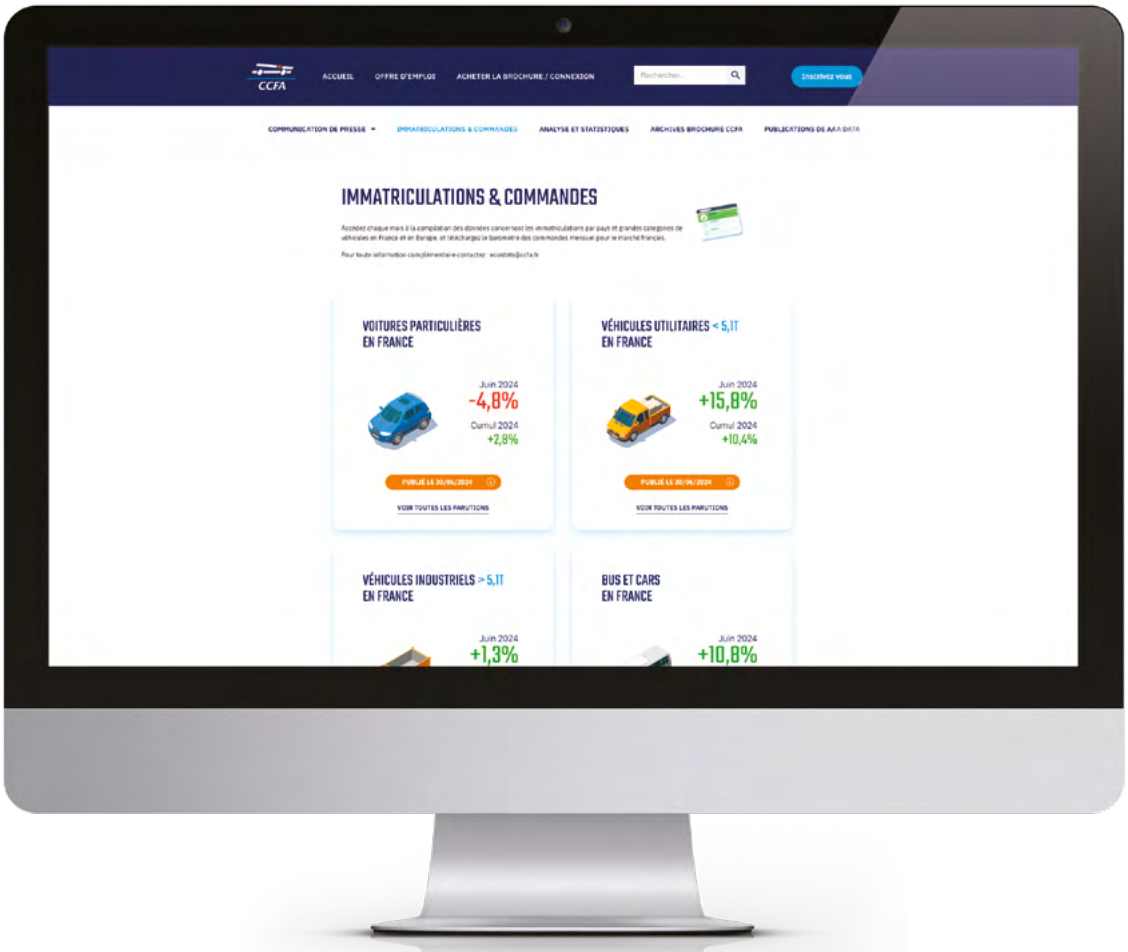


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