

KEY FIGURES



L'Observatoire will not be making any forecasts for 2022. Indeed, the forecasts carried out by L'Observatoire Cetelem are based on anticipated demand, which is dependent on the macro-economic context and the need for the cars currently on the road to be replaced. However, in 2021 shortages of semiconductors and microchips hampered the production and delivery of vehicles and this will remain the case in 2022, thus rendering demand-side forecasting models inaccurate.

THE NEW PASSENGER VEHICLE (NPV) MARKET

Sources: L'Observatoire Cetelem de l'Automobile, OICA, ACEA, C-Ways.

	2019	2020	2021*	2020/2021 variation
South Africa	355,379	246,712	300,000	22%
Germany	3,607,258	2,917,678	2,680,000	-8%
Belgium	550,003	431,491	380,000	-12%
Brazil	2,262,069	1,615,695	1,590,000	-2%
China	21,444,180	20,138,000	20,820,000	3%
Spain	1,258,260	851,211	840,000	-1%
United States	16,952,900	14,471,848	15,265,000	5%
France	2,214,279	1,650,118	1,630,000	-1%
Italy	1,916,320	1,381,496	1,470,000	6%
Japan	4,301,091	3,809,981	3,700,000	-3%
Mexico	763,793	532,472	544,000	2%
Norway	142,381	141,412	165,000	17%
Netherlands	446,114	358,330	325,000	-9%
Poland	555,598	428,347	455,000	6%
Portugal	223,799	145,417	142,000	-2%
United Kingdom	2,311,140	1,631,064	1,580,000	-3%
Turkey	387,256	610,109	584,000	-4%
17-COUNTRY TOTAL	59,691,820	51,361,381	52,470,000	2%

*Estimates and forecasts by L'Observatoire Cetelem de l'Automobile

GLOBAL LIGHT VEHICLE (LV) MARKET

Scope: all countries Light vehicles = passenger vehicles (PV) + light commercial vehicles (LCV)

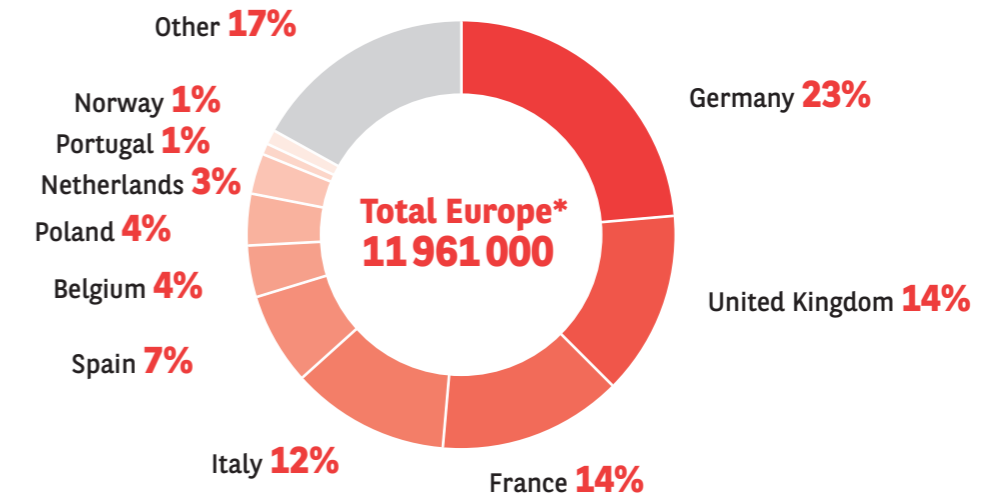
L'Observatoire Cetelem de l'Automobile, OICA, ACEA, C-Ways.

	2019	2020	2021*	2020/2021 variation
Global sales in millions of units	90	78	80	2%

*Estimates and forecasts by L'Observatoire Cetelem de l'Automobile

NEW PASSENGER VEHICLE REGISTRATIONS IN EUROPE* IN 2020

Source: ACEA



* Europe 26 (excl. Malta) + UK, Norway, Switzerland and Iceland

HOUSEHOLD PURCHASE RATE IN 6 COUNTRIES

The calculation is strictly based on car registrations for private use

Sources: Observatoire Cetelem de l'Automobile, ACEA, National statistical institutes, Manufacturers federations, C-Ways

	Total NPV registrations 2021*	Proportion of private individuals	Proportion of companies	Private registrations	Number of households	Household purchase rate
Germany	15,265,000	37%	63%	5,648,050	40,556,000	13.9%
France	300,000	43%	57%	129,000	30,304,000	0.4%
Italy	2,680,000	61%	39%	1,634,800	26,079,000	6.3%
United Kingdom	840,000	48%	52%	403,200	27,792,000	1.5%
Spain	380,000	42%	58%	159,600	18,793,900	0.8%
Belgium	20,820,000	44%	56%	9,160,800	4,881,500	187.7%
Total	40,285,000	43%	57%	17,135,450	148,406,400	11.5%

THE LEADING BRANDS IN EUROPE* IN 2021

TOP 25, first 9 months of 2021

Source: L'Observatoire Cetelem de l'Automobile, JATO, C-Ways.

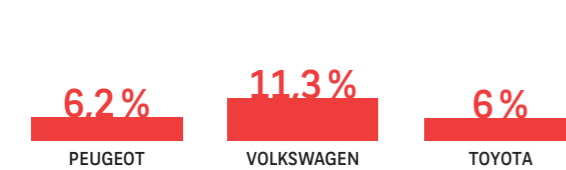
	Market share 9 months 2020	Market share 9 months 2021	2020/2021 change
VOLKSWAGEN	11.1%	11.3%	8.2%
PEUGEOT	6.3%	6.2%	5.4%
TOYOTA	5.4%	6.0%	19.9%
BMW	5.6%	5.8%	11.4%
RENAULT	6.9%	5.6%	-13.3%
MERCEDES	6.1%	5.3%	-7.5%
AUDI	5.1%	5.3%	11.5%
SKODA	5.4%	5.1%	1.8%
FORD	5.9%	4.9%	-11.5%
OPEL / VAUXHALL	4.1%	4.2%	11.0%
HYUNDAI	3.6%	4.2%	24.6%
KIA	3.7%	4.2%	21.2%
FIAT	3.8%	4.0%	10.8%

*Europe: EU + United Kingdom, Norway, Switzerland and Iceland

TOP 3 BRANDS IN EUROPE IN 2021

First 9 months of 2021.

Source: L'Observatoire Cetelem de l'Automobile, JATO, C-Ways.



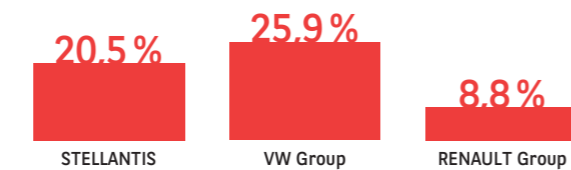
*Europe: EU + United Kingdom, Norway, Switzerland and Iceland

	Market share 9 months 2020	Market share 9 months 2021	2020/2021 change
CITROEN	3.9%	3.9%	6.7%
DACIA	3.4%	3.3%	2.6%
SEAT	3.1%	3.1%	4.9%
VOLVO	2.3%	2.3%	8.9%
NISSAN	2.4%	2.1%	-9.3%
SUZUKI	1.4%	1.7%	31.4%
MINI	1.5%	1.4%	3.5%
MAZDA	1.2%	1.4%	18.1%
TESLA	0.7%	1.2%	77.4%
JEEP	1.0%	1.1%	23.5%
LAND ROVER	1.0%	0.9%	3.0%
MITSUBISHI	0.9%	0.6%	-32.3%

TOP 3 GROUPS IN EUROPE IN 2021

First 9 months of 2021.

Source: ACEA Source: L'Observatoire Cetelem de l'Automobile, JATO, C-Ways



*Europe: EU + United Kingdom, Norway, Switzerland and Iceland

THE NEW-VEHICLE MARKET IN FRANCE

In number of registrations.

Source: L'Observatoire Cetelem de l'Automobile, ACEA, C-Ways based on SIV data

	2014	2015	2016	2017	2018	2019	2020	2021*
NPV - New passenger vehicle	1,795,885	1,917,226	2,015,177	2,110,748	2,173,518	2,214,428	1,650,118	1,630,000
LCV - Light commercial vehicle	372,074	379,424	397,085	438,645	459,038	479,769	401,124	424,000

* Estimates by L'Observatoire Cetelem de l'Automobile

MARKET SHARE OF ELECTRIC VEHICLES IN 2020

Sources: L'Observatoire Cetelem de l'Automobile, IEA, EAFU, C-Ways.

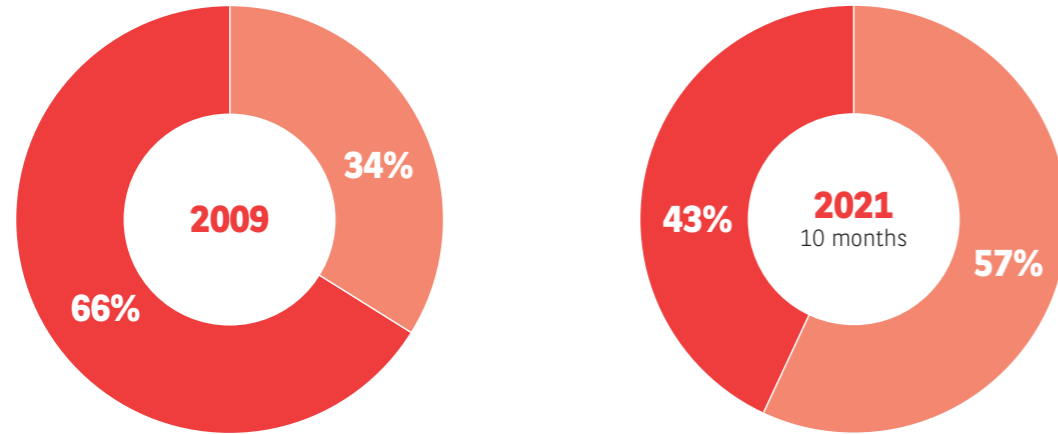
	Electric market share	Plug-in hybrid market share	Total
South Africa	0.0%	0.0%	0.0%
Germany	6.6%	6.9%	13.5%
Belgium	3.5%	7.7%	11.2%
Brazil	0.0%	0.0%	0.0%
China	4.6%	1.1%	5.7%
Spain	2.2%	2.8%	5.0%
United States	1.6%	0.4%	2.0%
France	6.7%	4.6%	11.3%
Italy	2.3%	2.0%	4.3%
Japan	0.3%	0.3%	0.6%
Mexico	0.2%	0.1%	0.3%
Norway	54.3%	20.5%	74.8%
Netherlands	20.5%	4.5%	25.0%
Poland	0.4%	0.4%	0.8%
Portugal	5.6%	8.2%	13.8%
United Kingdom	7.0%	4.3%	11.3%
Turkey	0.2%	0.1%	0.3%

STRUCTURE OF THE NEW PASSENGER VEHICLE MARKET IN FRANCE

In number of registrations.

Source: Observatoire Cetelem de l'Automobile, CCFA, C-Ways based on SIV data

■ Companies ■ Private individuals

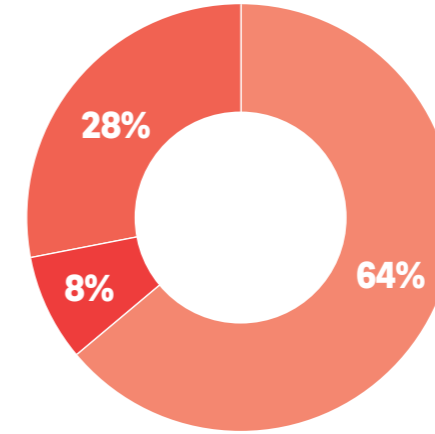


THE USED PASSENGER VEHICLE MARKET IN FRANCE IN 2021

First 10 months of 2021.

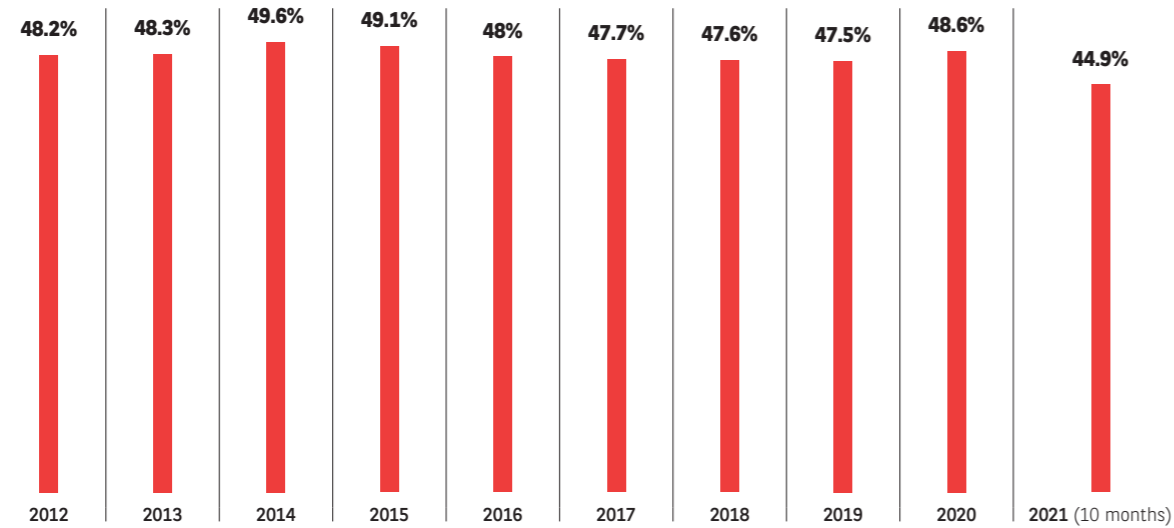
Source: C-Ways, based on SIV data

■ UVs less than one year old
 ■ UVs 1 to 5 years old
 ■ UVs over 5 years old



MARKET SHARE OF FRENCH BRANDS* ON THE NEW PASSENGER VEHICLE MARKET IN FRANCE

Source: L'Observatoire Cetelem de l'Automobile, CCFA, C-Ways based on SIV data



*French brands: Citroen, Peugeot, DS, Alpine and Renault