2011

THE AUTOMOBILE INDUSTRY POCKET GUIDE

EUROPEAN
AUTOMOBILE
MANUFACTURERS
ASSOCIATION

ACEA

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communications@acea.be

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Foreword

The automotive industry is a key contributor to the European economy and society. The economic turmoil in the past years has underlined the importance of having a strong manufacturing base in Europe and displayed the significance of automotive manufacturing in particular. Our industry has demonstrated its great resilience, a strength rooted in the manufacturers' innovative capacity and global technology leadership.

It is of utmost importance to retain the competitiveness of the sector and the European regulatory framework plays a decisive role in this respect. ACEA maintains a constant dialogue with policy makers and other stakeholders in the EU and provides expert knowledge and industry statistics.

The "Automobile Industry Pocket Guide" has become a valued tool for all those interested in automobile industry issues and policies. The 2011 edition contains the latest key figures on employment, vehicle production and registration, vehicle use and taxation, and international trade. It also briefly introduces ACEA, the automobile manufacturers trade association in Brussels.

Ivan Hodac
Secretary General ACEA

ACEA

About ACEA

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ACEA

ACEA in brief

- ACEA (Association des Constructeurs Européens d'Automobiles) is the European Automobile Manufacturers' Association based in Brussels. The industry association is one of many interest groups that contribute to an informed decision-making process in the EU.
- ACEA has sixteen members*: BMW Group, DAF Trucks, Daimler, FIAT, Ford of Europe, General Motors Europe, Jaguar Land Rover, MAN Truck & Bus, Porsche, PSA Peugeot Citroën, Renault Group, Scania, Toyota Motor Europe, Volkswagen Group, Volvo Cars and Volvo Group. From January 2012, Hyundai Motor Europe and IVECO will be members as well.
- ACEA was established in 1991. The Board of Directors (BOD) is composed of the Chief Executive Officers (CEOs) of the member companies, whereas the Commercial Vehicle Board of Directors (CV-BOD) is composed of the CEOs of the 7 commercial vehicle company members/branches: DAF Trucks, Daimler Trucks, IVECO, MAN Truck & Bus, Scania, Volkswagen Commercial Vehicles and Volvo Group. ACEA maintains close relationships with the 29 national automobile manufacturers' associations in Europe.
- ACEA is the first source of information with regard to vehicle-related regulation. The regulatory framework consists of around 80 EU Directives and more than 70 applicable UNECE regulatory agreements covering mostly technological issues and standards.
- ACEA is the main portal to clear and factual information about the European automobile industry, encouraging understanding of the sector's importance, complexity and contributions to society.

* Status 1/09/2011

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Corporate citizenship

The members of ACEA deploy numerous corporate social responsibility initiatives to the benefit of their employees and society-at-large. The industry's products, furthermore, meet the highest environmental and safety standards. This is the result of a long-standing tradition of innovation and investments in research and development.

- It takes 100 of today's cars to match the average pollutant emissions of 1 car built in the 1970s;
- Noise levels of vehicles have been reduced by 90% over the same period;
- Reducing fuel consumption has long been a matter of top-priority;
- On the safety front, the introduction of seatbelts, anti-lock braking systems, electronic stability control and airbags has cut fatalities and serious injuries to vehicle passengers by 80%. The development of further safety systems is an on-going process.

Acting as a responsible corporate citizen is not only desirable in itself; it also helps to build a relationship based on trust and loyalty between companies and their customers.

What interests does ACEA represent ?

ACEA represents an industry that is instrumental to EU growth and that plays an important part in everybody's life, through employment and social benefits, education and innovation, and through product and mobility concepts or investments.

- More than 12 million families depend on the sector for employment;
- ACEA members operate 169 manufacturing sites in 16 European countries;
- The industry's high quality products set the standard around the world and continuously push further innovation;
- ACEA members are the largest private investors in R&D in Europe;
- Net auto exports are worth €57 billion;
- ACEA members have an annual turnover over €500 billion.

The sector's advanced technologies, innovations and quality standards shoulder development and progress in many other sectors, from IT to logistics, health care and others.

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How does ACEA work ?

ACEA is led by the Secretary General and employs around fifteen experts covering policy issues and technical requirements in the fields of environment, fuels, emissions, road safety, recycling, trade, taxation, transport, type-approval and internal market.
Through specialist working groups and an extensive network within the vehicle industry, ACEA taps into a wealth of expertise and applied technical experience.

ACEA activities include, but are not limited to:

- Dialogue with the European Institutions and others stakeholders;
- Cooperation with policy makers and related industries to advance mutual understanding of industry-related issues and contribute to realistic and effective legislation, bearing in mind the interests of European society and its economy;
- Research and study of relevant developments and trends in automotive-related issues and policy fields;
- Strategic reflection on the increasingly global challenges of competitiveness and sustainability, drawing on the strengths and expertise of its members;
- Communication of the role and importance of the industry, of its common views and of reliable data and information;
- Monitoring of activities that influence the automobile industry, responding to and cooperating with the actors involved.

The industry's priority fields

The European automotive industry has several priority topics it discusses with the EU Institutions and other stakeholders:

- Strengthening the competitiveness of the EU economy and European automobile manufacturing in particular, through a comprehensive industrial policy that recognises and promotes manufacturing as a corner stone of future growth and prosperity;
- Adoption of integrated policies in the fields of road safety and environment, involving all relevant actors and factors;
- Better market access for European automotive products through balanced multilateral as well as bilateral/regional free trade agreements;
- Continuous development of efficient road infrastructure and other important infrastructure networks (energy, transport, telecommunications);
- A real completion of the Internal Market, which cannot be achieved without fiscal harmonisation of motor vehicle and fuel taxes;
- Reducing over-regulation and conflicting objectives of legislation; promoting adequate, independent impact assessment studies and reasonable lead-time periods for implementation of legislation; pursuing global harmonisation of technical regulations and standards for motor vehicles;
- Vigorous promotion of R&D efforts and innovation policy instruments.

ACEA cooperation & partnerships

ACEA has permanent and close cooperation with the European Council for Automotive R&D (EUCAR) which was established in 1994 as the research arm of the industry. EUCAR's purpose is to strengthen the competitiveness of the European automotive industry by promoting cooperative research of products, processes and systems in the pre-competitive stage.

ACEA maintains regular relations with a number of organisations with interests related to the automobile industry. These include the European Association of Automotive Suppliers (CLEPA), Intelligent Transport Systems - Europe (ERTICO), the European Committee for Motor Trades and Repairs (CECRA), the European Road Safety Federation (ERSF), the Fédération Internationale de l'Automobile (FIA), the European Petroleum Association (EUROPIA), the Confederation of European Business (BUSINESSEUROPE) and others.

ACEA also maintains a dialogue on international issues with automobile associations around the world, such as JAMA, KAMA, Auto Alliance, AAPC, OICA, CAAM, SIAM and many others.

ACEA Secretariat

Secretary General
Ivan Hodac

Director Emissions & Fuels
Paul Greening

Director Environmental Policy
Peter Kunze

Director Legal & Taxation
Marc Greven

Director Mobility & Sustainable Transport
Petr Dolejsi

Director Parliamentary Affairs
Céline Domecq

Director Regulatory Projects
Stefan Larsson

Director Regulatory Affairs
Eskil Sturesson

Director Safety
Renzo Cicilloni

Manager Statistics & Economics
Quynh-Nhu Huynh

Director Technical Affairs
Dolf Lamerigts

Director Trade & Economics
Erik Bergelin

Director Transport Policy
Fuensanta Martinez-Sans

Acea
Avenue des Nerviens 85
B-1040 Brussels
+32 2 732 55 50
info@acea.be

Director Communications & Public Relations
Sigrid de Vries

Manager Communications
Charles de Lusignan

Director Information Technology
Marc Vanderstraeten

Director Finance & Administration
Tanguy De Decker

Acea Tokyo Office
Anthony Millington
+81 3 350 563 41
anrm@miinet.or.jp

Acea Beijing Office
Dominik Declercq
+86 10 6463 4055
dd@acea-beijing.com

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ACEA Members*

BMW Group	DAF	DAIMLER	FIAT
Ford	GM	JAGUAR | LAND ROVER	MAN
PORSCHE	PSA PEUGEOT CITROËN	RENAULT	SCANIA
TOYOTA	VOLKSWAGEN AKTIENGESELLSCHAFT	VOLVO	VOLVO

BMW GROUP
Petuelring 130
D–80788 München
T. +49 89 3820
www.bmwgroup.com

DAF TRUCKS N.V.
Hugo van der Goeslaan 1
PoBox 90065
NL–5600 PT Eindhoven
T. + 31 40 214 9111
www.daftrucks.com

DAIMLER AG
D–70546 Stuttgart
T. +49 711 170
www.daimler.com

FIAT S.p.A.
Via Nizza 250
I-10126 Torino
T. +39 011 006 11 11
www.fiatspa.com

FORD OF EUROPE GmbH
Henry Fordstrasse 1
D–50725 Köln
T. +49 221 900
www.ford.com

GENERAL MOTORS EUROPE AG
ADAM OPEL AG
Bahnhofsplatz
D-65423 Rüsselsheim
T. +49 6142 770
www.gm.com

* Status 1/09/2011. HYUNDAI Motor Europe and IVECO will become members of ACEA as of 1 January 2012

HYUNDAI MOTOR EUROPE GmbH
(ACEA Member as from January 2012)
Kaiserleipromenande 5
D-63067 Offenbach am Main
T. +49 69 271 4720
www.hyundai-europe.com

IVECO S.p.A.
(ACEA Member as from January 2012)
Via Puglia 35
I-10156 Torino
T. +39 011 007 30 62
www.iveco.com

JAGUAR LAND ROVER
Banbury Road
Gaydon
UK–Warwick CV35 ORR
T. +44 19 2664 1111
www.jaguarlandrover.com

MAN Truck & Bus AG
Postfach 50 06 20
D–80995 München
T. +49 891 580 01
www.mantruckandbus.com

Dr. Ing. h.c.F. PORSCHE AG
Porschestrasse 42
D–70435 Stüttgart
T. +49 711 911 0
www.porsche.com

PSA PEUGEOT CITROËN
Avenue de la Grande Armée 75
F–75116 Paris Cedex
T. +33 1 40 66 55 11
www.psa-peugeot-citroen.com

RENAULT S.A.
Quai Alphonse Le Gallo 13-15
F–92109 Boulogne-Billancourt
T. +33 1 41 04 50 50
www.renault.com

SCANIA AB
S–151 87 Sodertalje
T. +46 8 55 38 10 00
www.scania.com

TOYOTA MOTOR EUROPE
Avenue du Bourget 60
B–1140 Brussels
T. +32 2 745 21 11
www.toyota.eu

VOLKSWAGEN AG
Berliner Ring 2
D–38436 Wolfsburg
T. +49 536 190
www.volkswagenag.com

VOLVO CAR CORPORATION
S–405 31 Göteborg
T. +46 31 59 00 00
www.volvocars.com

AB VOLVO
S–405 08 Göteborg
T. +46 31 66 51 70
www.volvogroup.com

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Brussels ACEA Member Representations

BMW Group

BMW Group Representative Office Brussels
Boulevard de Waterloo 25
B–1000 Brussels
T. +32 2 737 50 30

DAIMLER

Daimler EU Corporate Representation
Rue Froissart 133
B–1040 Brussels
T. +32 2 233 11 45

FIAT

Fiat S.p.A. Delegation to Europe
Rue Jules Cockx 12A
B–1160 Brussels
T. +32 2 513 63 92

Ford Motor Company EU Affairs
Rue Montoyer 40 bte 7
B–1000 Brussels
T. +32 2 761 06 11

GM

GM Europe Public Policy & Government Relations
Rue d'Idalie 9-13
B–1050 Brussels
T. +32 2 773 69 82

HYUNDAI

HYUNDAI Motor Group Brussels Office
(ACEA Member as from January 2012)
Rue de la Loi 227
B–1040 Brussels
T. +32 2 205 03 60

IVECO

IVECO EU Representation
(ACEA Member as from January 2012)
Rue Jules Cockx 12A
B–1160 Brussels
T. +32 2 513 63 92

Jaguar Land Rover Brussels Office
Rue Breydel 34
B–1040 Brussels
T. +32 2 235 86 32

MAN Truck & Bus AG Brussels Office
Rue Jacques de Lalaing 4
B–1040 Brussels
T. +32 2 230 41 95

PSA Peugeot Citroën EU Delegation
Avenue des Arts 53
B–1000 Brussels
T. +32 2 545 11 79

Renault Delegation to the EU
Avenue des Arts 40
B–1040 Brussels
T. +32 2 274 10 00

Scania EU Representation
c/o Kreab Gavin Anderson
Avenue de Tervueren 2
B–1040 Brussels
T. +32 2 737 69 02

Toyota Motor Europe
Avenue du Bourget 60
B–1140 Brussels
T. +32 2 745 21 11

Volkswagen Group EU Representation
Rue Archimède 25
B–1000 Brussels
T. +32 2 645 49 53

Volvo Car Corporation
Brussels Office EU Affairs
Rue du Luxembourg 3
B–1000 Brussels
T. +32 2 503 69 67

Volvo Group EU Representation
Rue du Luxembourg 3
B–1000 Brussels
T. +32 2 482 58 70

ACEA Associated Organisations

_AUSTRIA

FFOE

Fachverband der Fahrzeugindustrie Österreichs
Wiedner Hauptstrasse 63
A – 1045 Wien
T. +43 5 90 900 48 00
F. +43 5 90 900 289
www.wk.or.at/fahrzeuge

_BELGIUM

FEBIAC

Fédération Belge des Industries de l'Automobile et du Cycle
Belgische Federatie van de Automobiel-en tweewielerindustrie
Boulevard de la Woluwe 46 B6
B – 1200 Bruxelles
T. +32 2 778 64 00
F. +32 2 762 81 71
www.febiac.be

_BULGARIA

ACM

Association of Car Manufacturers and their authorised representatives for Bulgaria
Veliko Tarnovo Street 37
BG – 1504 Sofia
T. +359 2 946 12 50
F. +359 2 94 33 944
www.svab.bg

_CYPRUS

OEB

Employers & Industrialists Federation
Grivas Dhigenis Avenue 30
PoBox 21657
CY-1511Nicosia
T. +357 22 66 51 02
F. +357 22 66 94 59

_CZECH REPUBLIC

AIA CR (SAP)

Automotive Industry Association CR
Opletalova 55
CZ – 110 00 Praha 1
T. +420 221 602 982
F. +420 224 239 690
www.autosap.cz

_DENMARK

DK BIL

De Danske Bilimportører
Radhuspladsen 16
DK – 1550 Kobenhavn V
T. +45 39 16 23 23
F. +45 39 16 24 24
www.bilimp.dk

_ESTONIA

AMTEL

Union of Estonian Car Sales
and Service Enterprises
Pärnu Road 232
EST–11314 Tallinn
T. +372 672 23 06
F. +372 650 21 97
www.amtel.ee

_FINLAND

AUTOTUOJAT ry

Ateneuminkuja 2 C 10 Krs
FIN–00100 Helsinki
T. +358 207 928 855
F. +358 207 928 859
www.autotuojat.fi

_FRANCE

CCFA

Comité des Constructeurs Français
d'Automobiles
Rue de Presbourg 2
F–75008 Paris
T. +33 1 49 52 51 00
F. +33 1 49 52 51 88
www.ccfa.fr

_GERMANY

VDA

Verband Der Automobilindustrie
Behrebstrasse 35
D–10177 Berlin
T. +49 30 897 842-0
F. +49 30 897 842-600
www.vda.de

_GREECE

AMVIR (SEAA)

Association of Motor Vehicle
Importers-Representatives
Kifisias Avenue 294
GR–152 32 Halandri - Athens
T. +30 210 689 1400
F. +30 210 685 9 022
www.seaa.gr

_HUNGARY

AHAI (MGSZ)

Association of the Hungarian
Automotive Industry
Major u. 69
H–1119 Budapest
T. +36 1 382 9805
F. +36 1 382 9810
www.gepjarmuipar.hu

_IRELAND

SIMI

The Society of the Irish Motor Industry
Upper Pembroke Street 5
IRL–Dublin 2
T. +353 1 676 16 90
F. +353 1 661 92 13
www.simi.ie

_ITALY

ANFIA

Associazione Nazionale Filiera Industrie Automobilistiche
Corso Galileo Ferraris 61
I–10128 Torino
T. +39 011 554 65 11
F. +39 011 545 986
www.anfia.it

_LATVIA

LAADA

Latvian Authorized Automobile Dealers Association
Smerla Street 3 Suite 273
LV–1006 Riga
T. +371 6 752 99 79
F. +371 6 754 03 15
www.lpaa.lv

_LITHUANIA

LAA

Lithuanian Autoenterpreneurs Association
P. Zadeikos g. 1b
LT–06319 Vilnius
T. +370 5 230 12 24
F. +370 5 230 12 25
www.laa.lt

_MALTA

ACIM

Association of Car Importers Malta
PoBox 50 Valletta Building Level 2
MT–San Gwann
T. +356 21 38 57 74
F. +356 21 22 33 06

_NORWAY

BIL

BilimportØrenes Landsforening
Økernveien 99
PoBox 71 Økern
N–0508 Oslo
T. +47 22 64 64 55
F. +47 22 64 85 95
www.bilimportorenes-landsforening.no

_POLAND

PZPM

Polski Zwiazek Przemysłu Motoryzacyjnego
Al. Niepodleglosci 69
PL–02-626 Warsaw
T. +48 22 322 71 98/99
F. +48 22 322 76 65
www.pzpm.org.pl

_PORTUGAL

ACAP

Associação do Comércio Automóvel de Portugal
Avenida Torre de Belém 29
P–1400-342 Lisboa
T. +351 21 303 53 00
F. +351 21 302 14 74
www.acap.pt

_ROMANIA

ACAROM

Asociatiei Constructorilor de Automobile din Romania
Str. Banu Mărăcine - Bl. D5
RO–110194 Pitesti
T. +40 248 219 958
F. +40 248 217 990
www.acarom.ro

_SLOVENIA

ADS

Association of Automobile Manufacturers and Authorised Importers
c/o Chamber of Commerce & Industry of Slovenia
Dimiceva 13
SI–1000 Ljubljana
T. +386 1 58 98 217
F. +386 1 58 98 219
www.ads-slo.org

_SLOVAK REPUBLIC

ZAPSR

Automotive Industry Association SR
Tomasikova 26
SK–821 01 Bratislava
T. +421 2 4364 2235
F. +421 2 4364 2237
www.zapsr.sk

_SPAIN

ANFAC

Asociación Española de Fabricantes de Automóviles y Camiones
Calle Fray Bernardino Sahagún 24
E–28036 Madrid
T. +34 91 343 13 43
F. +34 91 345 03 97
www.anfac.com

_SWEDEN

BIL
PoBox 26173
S–100 41 Stockholm
T. +46 8 700 41 00
F. +46 8 791 23 11
www.bilsweden.se

_SWITZERLAND

Auto–Suisse | Auto–Schweiz
Association Importateurs Suisses d'Automobiles
Vereinigung Schweizer Automobil-Importeure
Mittelstrasse 32
Postfach 5232
CH–3001 Bern
T. +41 31 306 65 65
F. +41 31 306 65 50
www.auto-suisse.ch
www.auto-schweiz.ch

_THE NETHERLANDS

RAI
De Rijwiel en Automobiel Industrie Vereniging
Wielingenstraat 28
PoBox 74800
NL–1070 DM Amsterdam
T. +31 20 504 49 49
F. +31 20 646 38 57
www.raivereniging.nl

_TURKEY

OSD
Automotive Manufacturers Association
Atilla Sokak 10 Altunizade
TR–34676 Istanbul
T. +90 216 318 29 94
F. +90 216 321 94 97
www.osd.org.tr

_UNITED KINGDOM

SMMT
The Society of Motor Manufacturers and Traders
Great Peter Street 71
UK- London SW1P 2BN
T. +44 207 235 70 00
F. +44 207 235 71 12
www.smmt.co.uk

EUCAR
EUROPEAN COUNCIL FOR AUTOMOTIVE R&D

EUCAR secretariat is composed of:

Simon Godwin
sg@eucar.be
Director

Alessandro Coda
ac@eucar.be
Research Coordinator

EUCAR members are:

BMW, DAF, Daimler, Fiat, Ford Europe, GM/Opel, Jaguar Land Rover, Porsche, PSA Peugeot Citroën, Renault, Scania, Volkswagen Group, Volvo Cars and Volvo Group.

The European Council for Automotive R&D (EUCAR) is the research organisation for the major automotive manufacturers in Europe, with the mission to strengthen the competitiveness of the manufacturers through strategic collaborative R&D.
Together with its members, EUCAR identifies the common R&D challenges of the industry. These are communicated to the European Commission and other key institutions and stakeholders. EUCAR's members participate in collaborative research projects with manufacturers, suppliers and research providers. Projects are mainly financed through European Union funding programmes matched with industry funding.

EUCAR key research is in the following domains:

- Fuels and Powertrain
- Materials, Processes and Manufacturing
- Integrated Safety
- Mobility and Transport

Key figures

2011

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The European automobile industry...

Jobs

The automotive industry is a formidable employer in Europe. At least **12** million families depend on automotive employment with **2.3** million direct jobs and another **10.4** million in directly related manufacturing and other sectors.

Growth

Europe is the world's largest vehicle producer with an output of over **17** million passenger cars, vans, trucks and buses per year*, or **25%** of worldwide vehicle production*.

* average of the last 5 years

Innovation

Automobiles are highly complex and innovative products. The ACEA members invest annually over € **26** billion in R&D, or **5%** of their turnover. Total automotive R&D investments, including those from suppliers, are even higher. The auto industry is the largest private investor in R&D in Europe.

… the "engine of Europe"

Made in Europe

The 16 major car, truck and bus manufacturers in Europe operate 169 vehicle assembly and engine production plants in 16 Member States, often sustaining the economic fabric of complete regions and cities.

Global Scope

The automobile industry is a leading EU export sector with a net trade contribution of € 57 billion.
Leading in high-quality products, the industry sells and produces vehicles in all major world markets.

Sustainable Mobility

Cars, trucks and buses are the source of everyday mobility and transportation, fuelling economic activity, social life and cultural exchange. European manufacturers are leading in environmental and safety technologies and are a driving force behind the sustainable mobility concepts of the future.

Key figures

PRODUCTION	Total Motor Vehicles (Worldwide)	2010	77.6 Mn units	
	Total Motor Vehicles (EU27)	2010	16.9 Mn units	= 22% of worldwide MV production
	Total Passenger Cars (Worldwide)	2010	58.3 Mn units	
	Total Passenger Cars (EU27)	2010	15.1 Mn units	= 26% of worldwide PC production
	Production value	2007	756 Bn EUR	
NEW REGISTRATIONS	Total MV (Worldwide)	2010	70.0 Mn units	
	Total MV (EU27)	2010	15.1 Mn units	= 22% of worldwide MV registrations/sales
	Total Passenger Cars (Worldwide)	2010	56.1 Mn units	
	Total Passenger Cars (EU27)	2010	13.4 Mn units	= 24% of worldwide PC registrations/sales
	Diesel (Western Europe)	2010	52% Share	
EMPLOYMENT	Manufacture of Motor Vehicles (EU27)	2007	2.3 Mn people	= 7% of EU manufacturing industry
	Total (including indirect, EU25)	2007	12.6 Mn people	= 6% of EU employed population
TURNOVER	ACEA members	2008	536 Bn EUR	
R&D INVESTMENT	ACEA members	2008	26 Bn EUR	=5% of turnover
VALUE ADDED	EU27	2007	155.4 Bn EUR	= 9% of manufacturing sector
EXPORTS	Extra-EU27	2010	83.3 Bn EUR	
IMPORTS	Extra-EU27	2010	26.2 Bn EUR	
TRADE BALANCE		2010	57.1 Bn EUR	
MV IN USE (PARC)	Total Motor Vehicles	2009	270.8 Mn units	
(EU27)	Passenger Cars	2009	236.1 Mn units	
	Motorization rate (cars)	2009	473 per 1,000 inhab.	
TAX REVENUE FROM MOTOR VEHICLES (EU15)		2010	413.7 Bn EUR	= 3,4% of EU15 GDP

EUROPE = EU 27 + EFTA + OTHERS (TURKEY, RUSSIA, ROMANIA, OTHERS)
W.EUROPE = EU 15 + EFTA

SOURCE: ACEA, VDA, AAA, GLOBAL INSIGHT, EUROSTAT

Employment

Employment

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EUROPEAN AUTOMOBILE MANUFACTURERS ASSOCIATION

ACEA

Over 12 million families depend on the automobile industry in Europe

Automobile Sector: Direct and Indirect* Employment | **2007**

AUTOMOTIVE INDUSTRY (PRODUCTION OPERATIONS)		**2.3 Mn Jobs**
› Automobile manufacturing	(NACE dm341)	
› Bodywork, trailers, caravans	(NACE dm342)	
› Equipment and accessories	(NACE dm343)	
CLOSELY RELATED MANUFACTURING ACTIVITIES		**1.2 Mn Jobs**
› Manufacture, retreading and rebuilding of rubber tyres and tubes	(NACE dh2512)	
› Manufacture of bearings, gears, gearing and driving elements	(NACE dk2914)	
› Manufacture of cooling and ventilation equipment	(NACE dk2923)	
› Manufacture of computers and other information processing equipment	(NACE dl3002)	
› Manufacture of electric motors, generators and transformers	(NACE dl311)	
› Manufacture of electrical equipment for engines and vehicles (not elsewhere reported)	(NACE dl3161)	
AUTOMOBILE USE		**4.2 Mn Jobs**
› Sale and distribution of motor vehicles	(NACE g501)	
› Maintenance and repair of motor vehicles	(NACE g502)	
› Sale of motor vehicle parts and accessories	(NACE g503)	
› Retail sale of automotive fuel	(NACE g505)	
TRANSPORT		**4.9 Mn Jobs**
› Road transport (passengers and freight)	(NACE i602)	
Total		**12.6 Mn Jobs**

SOURCE: EUROSTAT 2011 – DATA OF 2007

* Indirect employment data does not report employment in raw material sector (e.g. steel, aluminium, glass, etc.), textile, driving schools, licensing activities, vehicle testing, vehicle insurance and financing, etc.

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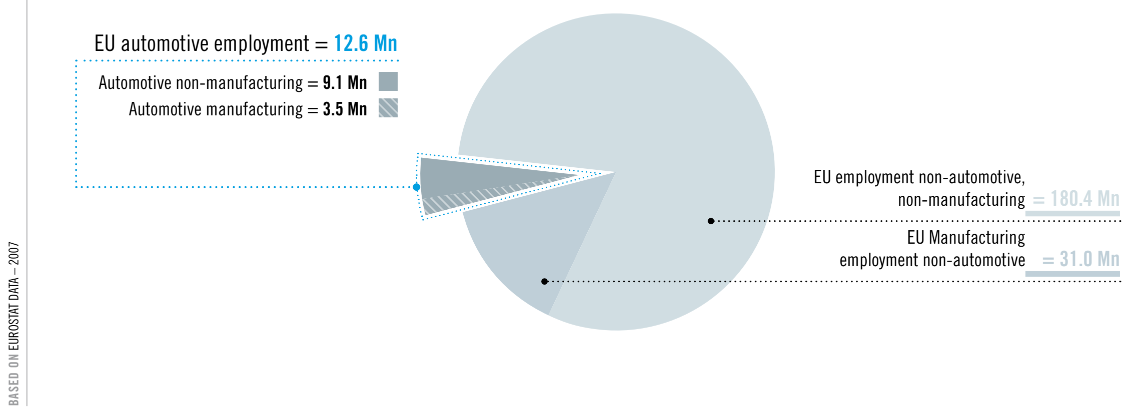
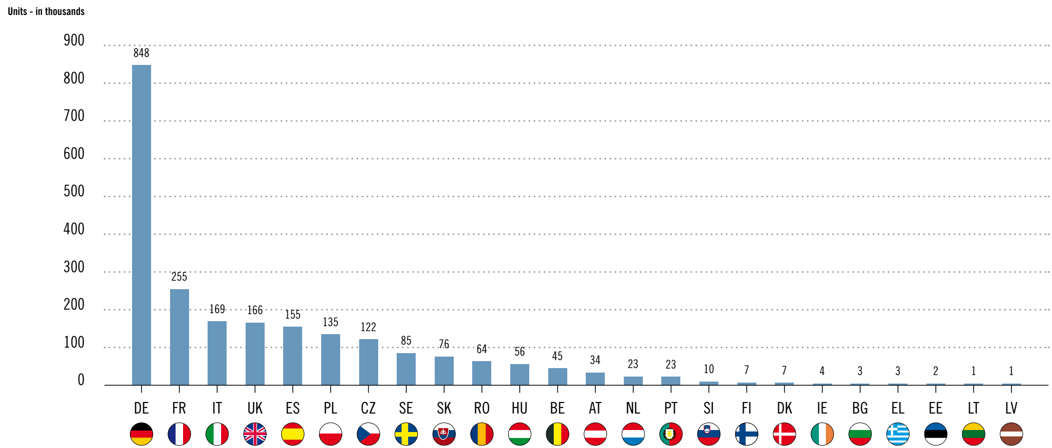
Automotive Employment put into Perspective



Manufacturing employment related to the automotive sector	**3.5 Mn people**	= 10.2% of total employment in EU manufacturing
Total automotive employment (manufacturing & sevices)	**12.6 Mn people**	= 5.6% of EU employed population
EU27 total population	**493.5 Mn people**	
EU27 total employment	**224.1 Mn people**	
EU27 employed population in manufacturing sector	**34.5 Mn people**	= 15.4% of total employed population

BASED ON EUROSTAT DATA, 2007; ILO DATA 2007

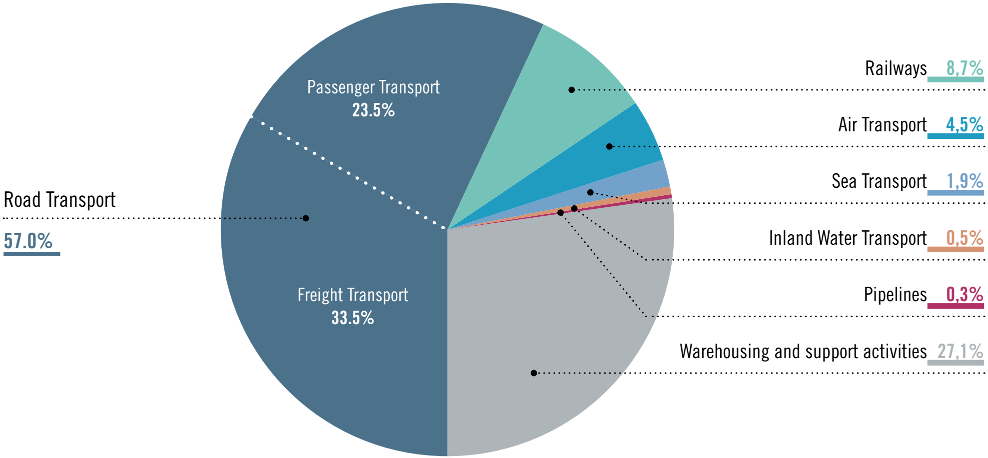
Direct Automotive Employment by Country | **2007**



SOURCE: EUROSTAT 2011 – DATA OF 2007

Each direct job creates at least another 5 related jobs

Employment* by Mode of Transport | **2008**



SOURCE: EUROSTAT 2011 – DATA OF 2008

* Employment in companies whose main activity lies in the transport mode concerned

Production

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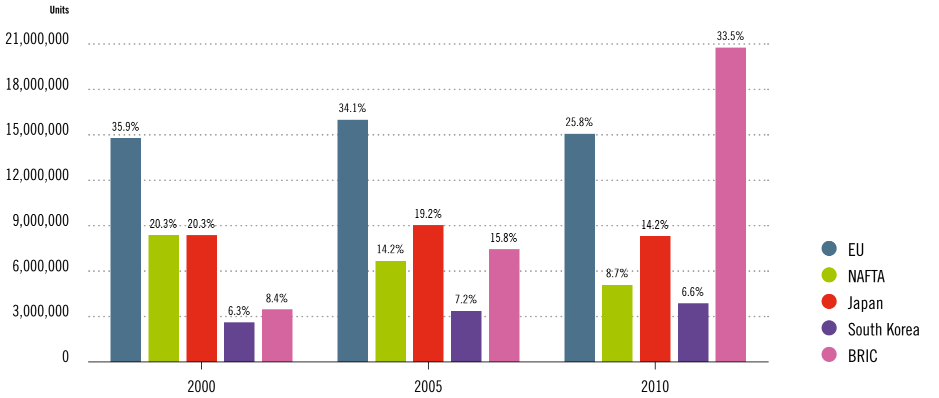
Passenger Car Production - International Comparison | **2000 – 2010**



SOURCE: OICA - 2011

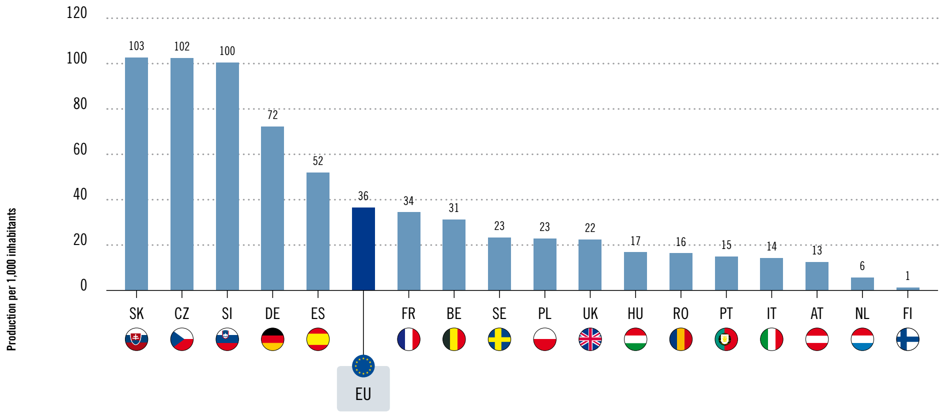
Passenger Car Production Worldwide | **2010**

	VOLUME	% SHARE
EU	15,068,473	25.8%
NAFTA	5,090,128	8.7%
Japan	8,307,382	14.2%
South Korea	3,866,206	6.6%
BRIC	20,748,302	35.5%
Total World	**58,478,810**	**100%**

SOURCE: OICA – 2011

The EU produces 36 vehicles per 1,000 inhabitants

Motor Vehicle Production per 1,000 inhabitants | **2010**



SOURCE: EUROSTAT; ACEA – 2011

Automobile assembly & engine production plants in Europe

Overview

EU		Plants
AT	Austria	6
BE	Belgium	9
BG	Bulgaria	1
CZ	Czech republic	9
DE	Germany	47
ES	Spain	15
FI	Finland	2
FR	France	38
HU	Hungary	6
IT	Italy	20
NL	Netherlands	9
PL	Poland	16
PT	Portugal	5
RO	Romania	4
SE	Sweden	15
SI	Slovenia	1
SK	Slovakia	3
UK	United Kingdom	31

EXTRA EU		Plants
BIH	Bosnia Herzegovina	1
BY	Belarus	3
KZ	Kazakhstan	1
RS	Serbia	1
RU	Russia	25
TR	Turkey	17
UA	Ukraine	5
UZ	Uzbekistan	1

	Countries	Plants
Total	26	291
EU	18	236
ACEA MEMBERS	Countries	Plants
Total	22	191
EU	16	169

SOURCE: ACEA – JANUARY 2011

2

Motor Vehicle Production in the EU by Country | **2010**

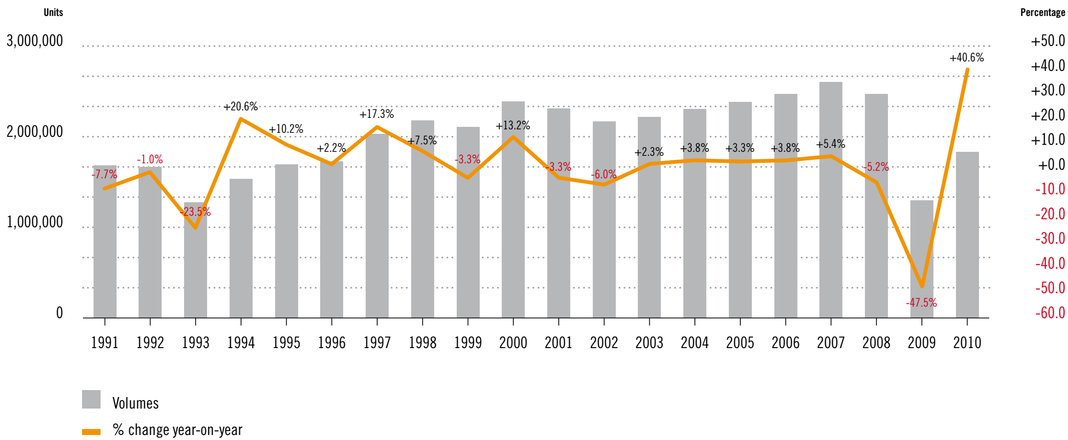
					TOTAL
AUSTRIA	86,000		18,814		104,814
BELGIUM	313,520		24,340	430	338,290
CZECH REPUBLIC	1,069,518	2,745	1,411	2,711	1,076,385
FINLAND	6,500				6,500
FRANCE	1,922,339	262,479	39,120	3,436	2,227,374
GERMANY	5,552,409	212,511	134,129	6,936	5,905,985
HUNGARY	165,000		2,760	130	167,890
ITALY	573,169	254,290	28,770	1,130	857,359
NETHERLANDS	48,025		44,764	1,317	115,487
POLAND	785,000	73,953	2,015	4,487	869,376
PORTUGAL	114,563	39,770	4,320	70	158,723
ROMANIA	323,587	27,270		0	350,912
SLOVAKIA	556,941				556,941
SLOVENIA	195,207	10,504			205,711
SPAIN	1,913,513	437,242	36,891	254	2,387,900
SWEDEN	177,084		30,000	10,000	217,084
UNITED KINGDOM	1,270,444	111,395	10,116	1,508	1,393,463
EUROPEAN UNION *	15,068,473	1,426,518	377,106	32,339	16,904,436

* Double countings are deducted from the totals

SOURCE: SOURCE: ACEA - 2011 (NATIONAL AUTOMOBILE ASSOCIATIONS)

Commercial vehicle production trend

Commercial Vehicle Production in the EU | **1991-2010**

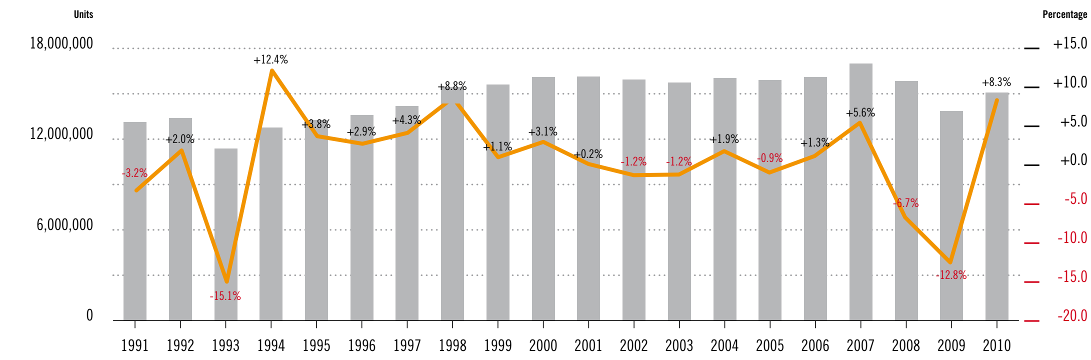


SOURCE: ACEA – 2011

2

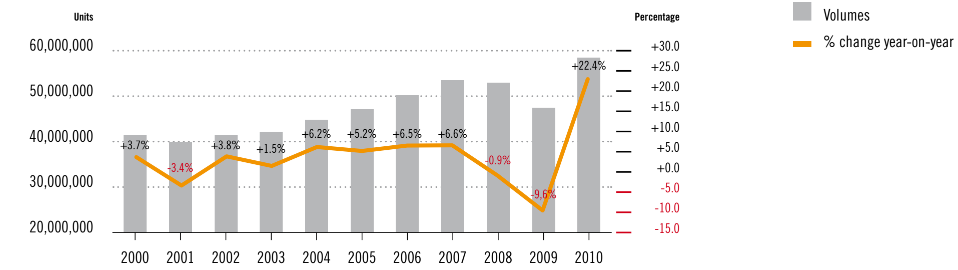
Passenger car production trend

Passenger Car Production in the EU | **1991-2010**



SOURCE: ACEA – 2011

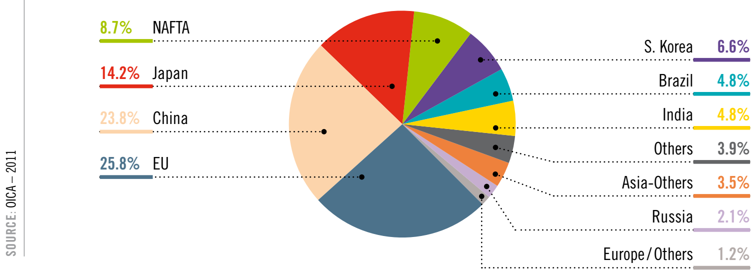
Passenger Car Production Worldwide | **2000-2010**



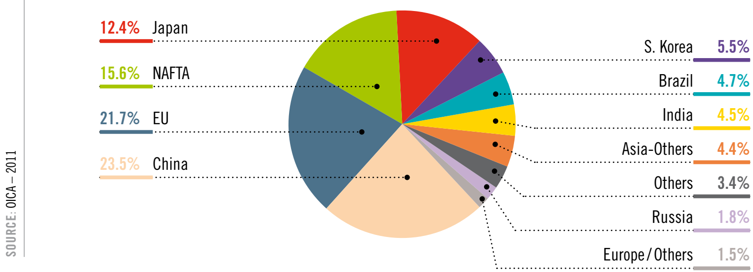
SOURCE: OICA – 2011

26% of passenger cars are produced in the EU

World **Passenger Car** Production (% share) | **2010**



World **Motor Vehicle** Production (% share) | **2010**



Registrations

2011

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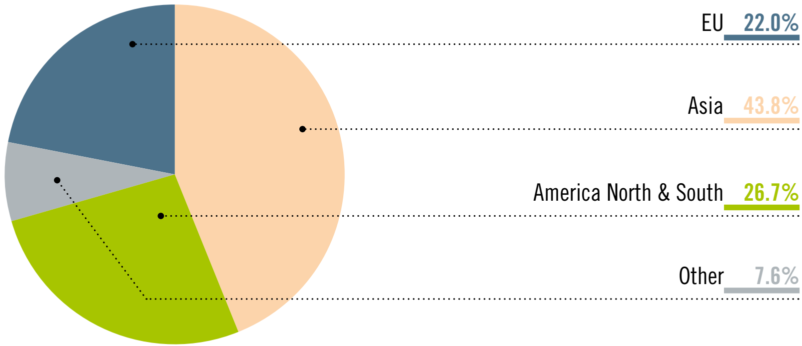
Europe represents a market of over 15 Mn new vehicles per year

Motor Vehicle Registrations Worldwide | **2010**



SOURCE: ACEA – 2011

22% of new vehicles in the world were sold in the EU in 2010

Motor Vehicle Registrations in the EU by Country | **2010**

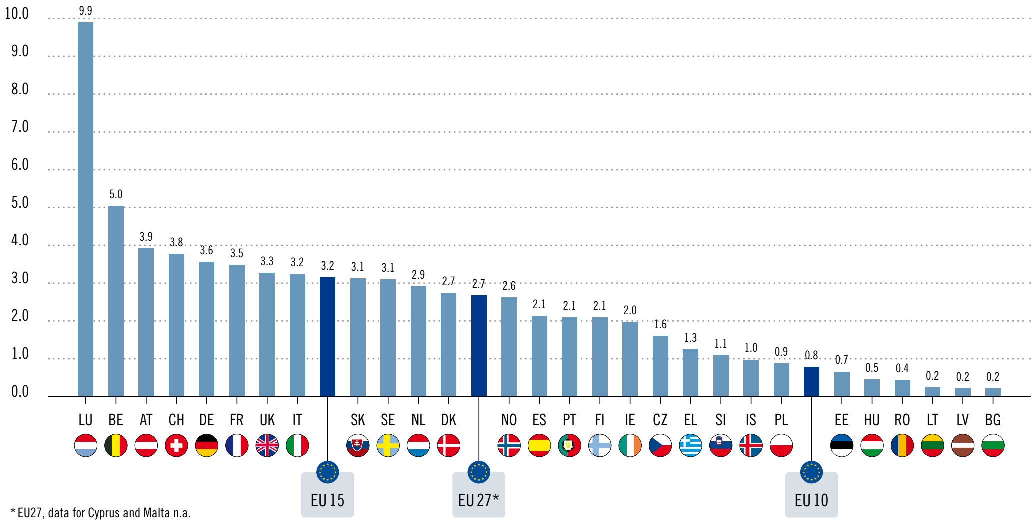
					TOTAL
AT	328,563	27,991	5,250	760	362,564
BE	547,347	52,509	7,649	1,019	608,524
BG	16,257	2,560	1,180	85	20,082
CZ	169,236	11,576	5,445	751	187,008
DK	151,550	16,269	2,749	657	171,225
EE	8,848	1,069	368	125	10,410
FI	111,968	11,045	2,870	513	126,396
FR	2,251,669	415,449	35,859	5,906	2,708,883
DE	2,916,260	196,533	80,405	5,219	3,198,417
EL	141,499	10,631	1,307	403	153,840
HU	45,081	9,195	2,278	272	56,826
IE	88,373	10,546	1,020	47	99,986
IT	1,960,282	186,738	18,130	3,769	2,168,919
LV	4,976	548	528	137	6,189
LT	7,970	936	1,369	90	10,365

					TOTAL
LU	49,726	3,100	784	174	53,784
NL	483,619	49,610	9,487	684	543,400
PL [2]	333,539	40,445	13,815	1,072	388,871
PT	223,491	45,678	3,122	491	272,782
RO	94,541	6,904	2,350	344	104,139
SK	64,033	6,918	2,364	504	73,819
SI	59,226	5,345	883	142	65,596
ES	982,015	116,075	13,601	2,428	1,114,119
SE	289,684	37,902	4,876	1,672	334,134
UK	2,030,846	223,276	34,458	6,562	2,295,142
EU [1]	13,360,599	1,488,848	252,147	33,826	15,135,420
IS	3,106	231	33	25	3,395
NO	127,754	29,040	4,078	1,482	162,354
CH	294,239	24,715	3,439	531	322,924
EFTA	425,099	53,986	7,550	2,038	488,673
EU+EFTA	13,785,698	1,542,834	259,697	35,864	15,624,093

1 Data for Cyprus and Malta not available
2 Sales figures

SOURCE: ACEA – 2011 (NATIONAL AUTOMOBILE ASSOCIATIONS)

New Car Registrations per 100 inhabitants | **2010**

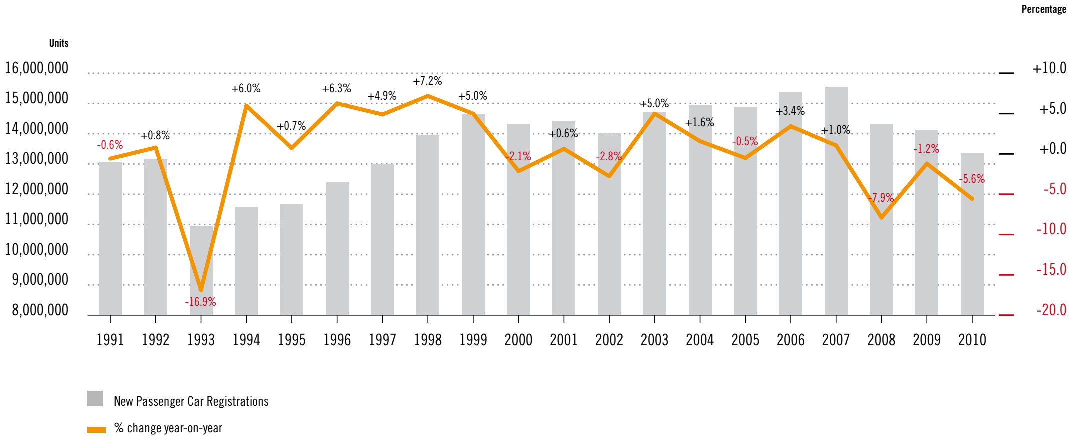


* EU27, data for Cyprus and Malta n.a.

SOURCE: ACEA – 2011

Trend in new EU car registrations

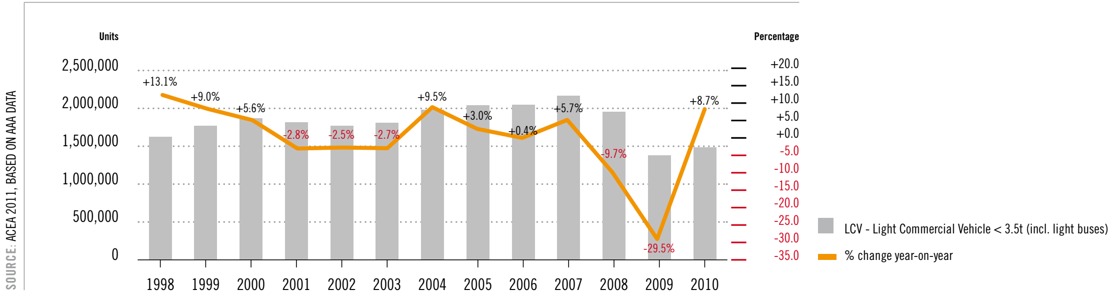
New **Car** Registrations in the EU I **1991-2010**



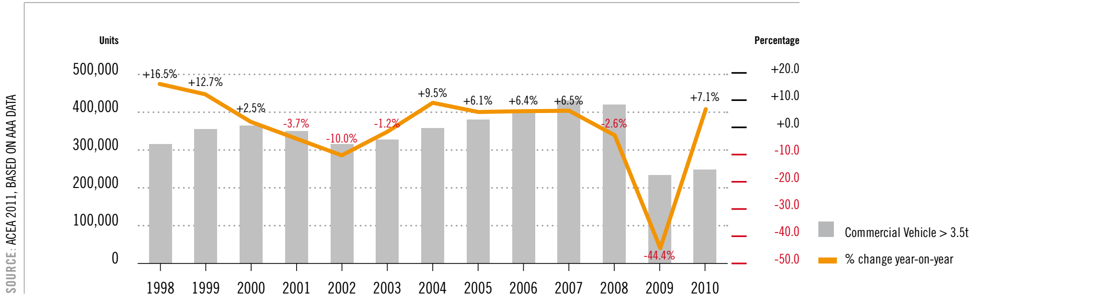
SOURCE: ACEA – 2011

Trend in new EU commercial vehicle registrations

New **Light Commercial Vehicle** Registrations in the EU | **1998-2010**

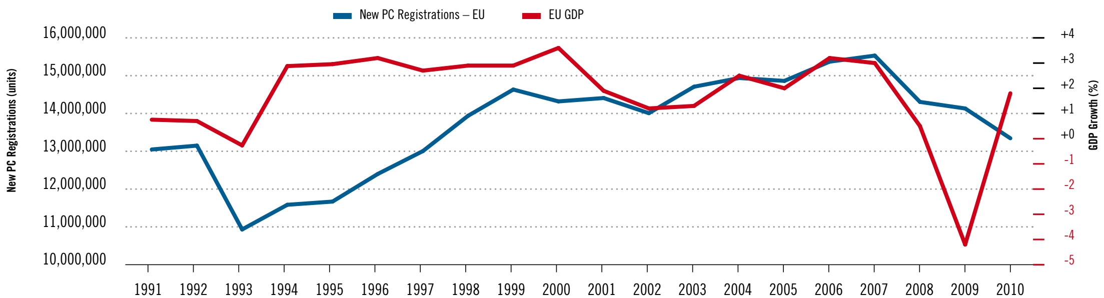


New **Heavy Commercial Vehicle** Registrations in the EU | **1998-2010**



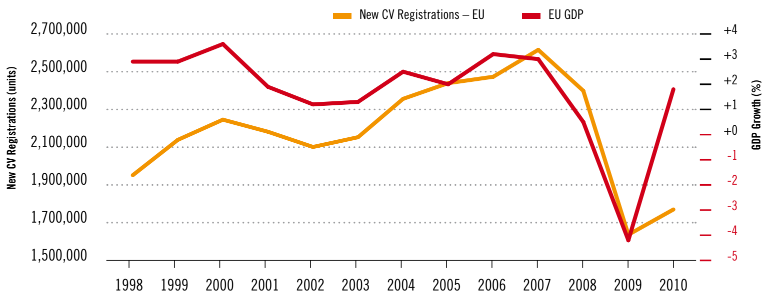
Vehicle sales develop in relation to economic growth

New **Passenger Car** Registrations in the EU and GDP | **1991-2010**



SOURCE: AAA, ACEA, DG ECFIN

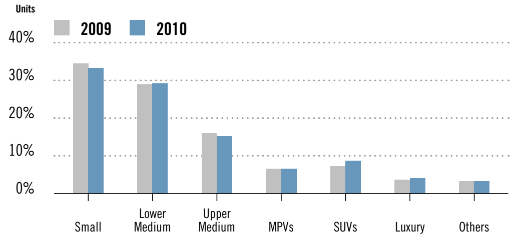
New **Commercial Vehicle** Registrations in the EU and GDP | **1998-2010**



SOURCE: AAA, ACEA, DG ECFIN

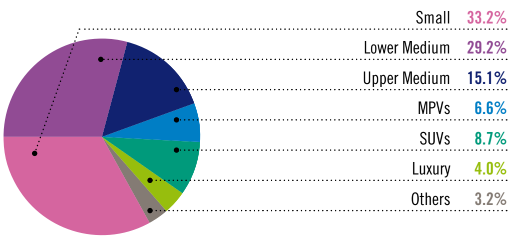
A closer look at consumer demand

New Cars sold in Europe* by Segment | 2009-2010



SOURCE: IHS GLOBAL INSIGHT – 2010

New Cars sold in Europe* by Segment | 2010



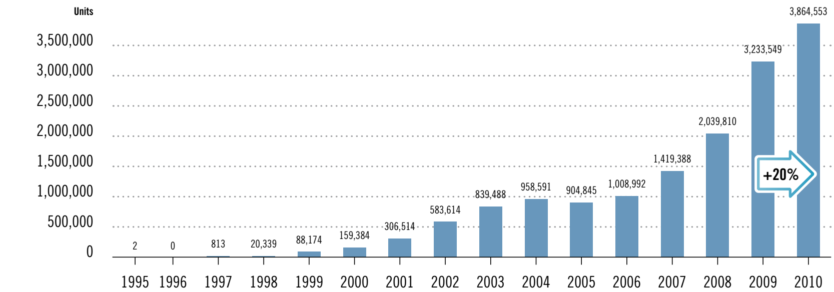
SOURCE: IHS GLOBAL INSIGHT – 2010

*2010; EU27, Norway and Switzerland, excluding Luxembourg

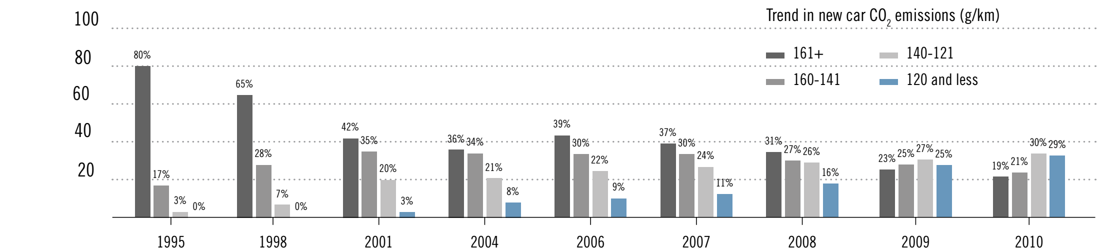
More information on trends in new car characteristics at http://www.acea.be/index.php/news/news_detail/trends_in_new_car_characteristics/

The drive towards fuel efficiency

Demand for Cars ≤ 120 gCO_2/km | **1995-2010**



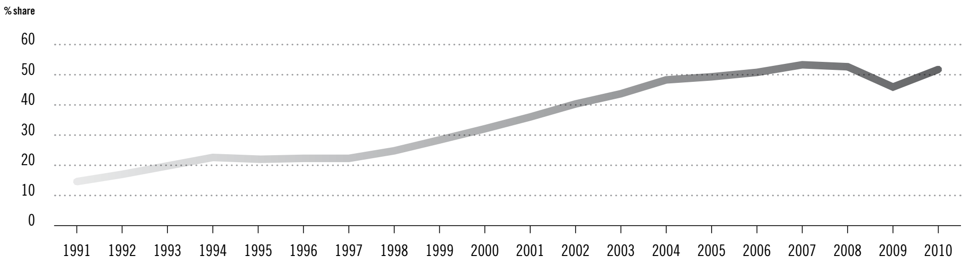
CO_2 Emissions from New Cars | **1995-2010**



SOURCE: AAA FIGURES FOR THE EU15 FROM 1995 TO 2009; AND 23EU COUNTRIES IN 2010 (DATA FOR BG, RO, CY AND MT n/a)

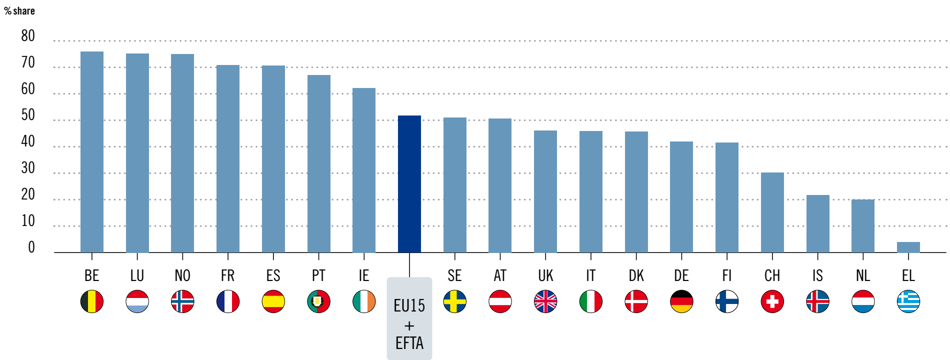
Most new cars have a diesel engine

Diesel Penetration in the EU15+EFTA (% of new cars registered) | 1991-2010



SOURCE: AAA FIGURES FOR THE EU15+EFTA

Diesel Penetration in the EU15+EFTA by Country (% of new cars registered) | 2010



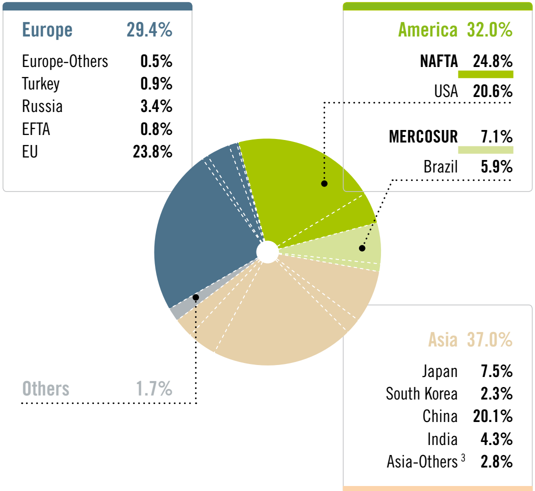
SOURCE: AAA FIGURES FOR THE EU15+EFTA

More information on trends in new car characteristics at http://www.acea.be/index.php/news/news_detail/trends_in_new_car_characteristics/

New passenger car registrations – the global view

Market Shares | 2010

PASSENGER CARS	2010	% share	2009	% change
EUROPE	16,458,355	29.4%	16,592,720	-0.8%
EU	13,360,599	23.8%	14,132,346	-5.5%
EFTA	425,099	0.8%	366,713	15.9%
Russia	1,910,573	3.4%	1,465,742	30.3%
Turkey	509,784	0.9%	369,819	37.8%
Europe-Others	252,300	0.5%	258,100	-2.2%
AMERICA [1]	17,926,495	32.0%	16,091,747	11.4%
NAFTA	13,927,945	24.8%	12,612,934	10.4%
of which USA	11,554,576	20.6%	10,401,682	11.1%
MERCOSUR	3,998,550	7.1%	3,478,813	14.9%
of which Brazil	3,328,946	5.9%	3,008,742	10.6%
ASIA	20,743,867	37.0%	16,586,867	25.1%
Japan	4,212,267	7.5%	3,923,741	7.4%
South Korea	1,308,326	2.3%	1,235,736	5.9%
China	11,265,712	20.1%	8,380,870	34.4%
India	2,386,828	4.3%	1,816,878	31.4%
Asia-Others [2]	1,570,734	2.8%	1,229,642	27.7%
OTHERS [3]	933,246	1.7%	819,635	13.9%
TOTAL WORLD	56,061,963	100.0%	50,090,969	11.9%



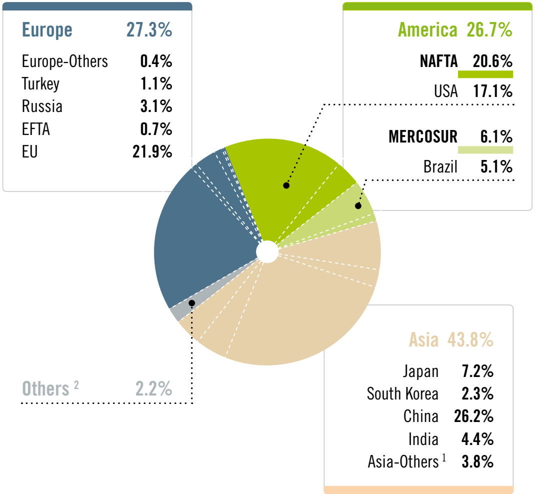
1. Including Light Commercial Vehicles
2. Indonesia, Malaysia, Philippines, Taiwan, Thailand
3. Australia, New Zealand, South Africa

SOURCE: ACEA – 2011

New motor vehicle registrations – worldwide

Market Shares | 2010

MOTOR VEHICLES	2010	% share	2009	% change
EUROPE	**18,813,194**	**27.3%**	**18,663,052**	**0.8%**
EU	15,135,420	21.9%	15,766,892	-4.0%
EFTA	488,673	0.7%	422,869	15.6%
Russia	2,105,729	3.1%	1,599,222	31.7%
Turkey	793,172	1.1%	575,869	37.7%
Europe-Others	290,200	0.4%	298,200	-2.7%
AMERICA	**18,418,284**	**26.7%**	**16,487,456**	**11.7%**
NAFTA	14,204,921	20.6%	12,859,074	10.5%
of which USA	11,772,278	17.1%	10,601,368	11.0%
MERCOSUR	4,213,363	6.1%	3,628,382	16.1%
of which Brazil	3,515,064	5.1%	3,141,240	11.9%
ASIA	**30,206,840**	**43.8%**	**23,916,167**	**26.3%**
Japan	4,956,136	7.2%	4,609,256	7.5%
South Korea	1,555,988	2.3%	1,464,961	6.2%
China	18,061,936	26.2%	13,644,794	32.4%
India	3,039,517	4.4%	2,266,269	34.1%
Asia-Others [1]	2,593,263	3.8%	1,930,887	34.3%
OTHERS [2]	**1,541,813**	**2.2%**	**1,361,101**	**13.3%**
TOTAL WORLD	**68,980,131**	**100.0%**	**60,427,776**	**14.2%**



1. Indonesia, Malaysia, Philippines, Taiwan, Thailand
2. Australia, New Zealand, South Africa

SOURCE: ACEA – 2011

Vehicles in Use

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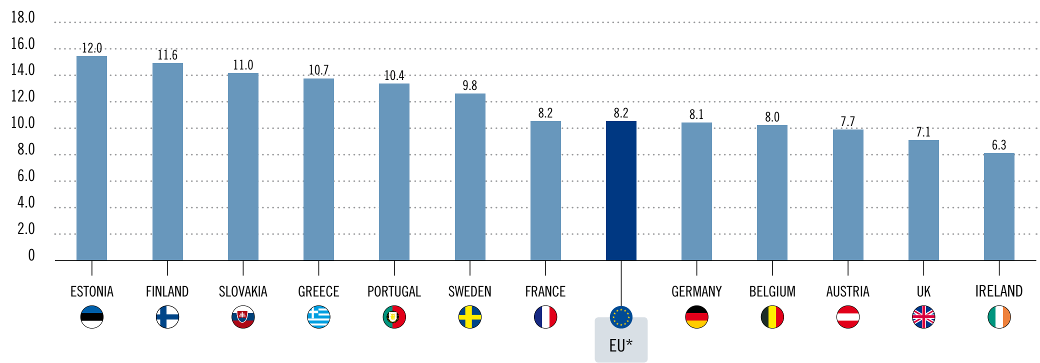
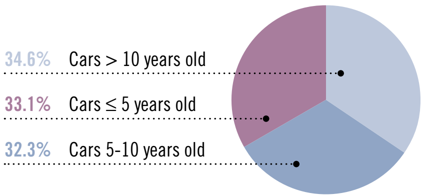
Cars in the EU are on average 8.2 years old

Average Car Age by Country | 2009



SOURCE: ANFAC, ACEA – 2011

Car Fleet* Composition | 2009

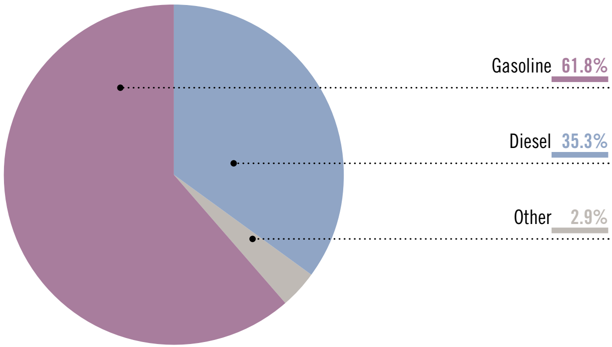


SOURCE: ANFAC, ACEA – 2011

* for available countries: *Austria, Belgium, Denmark, Estonia, Finland, France, Germany, Greece, Ireland, Italy, Latvia, Lithuania, Netherlands, Portugal, Slovakia, Spain, Sweden, UK.*

EU vehicle fleet composition

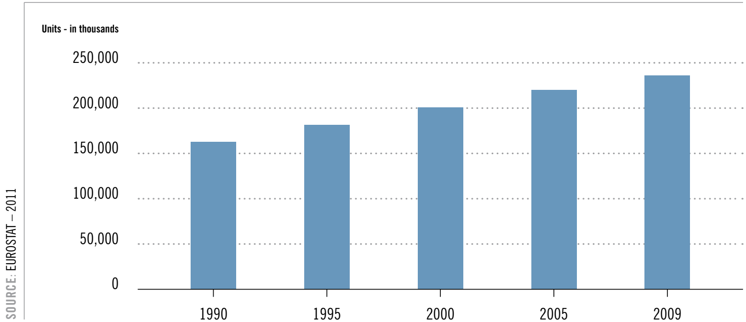
EU Passenger Car Fleet by Fuel Type | **2009**



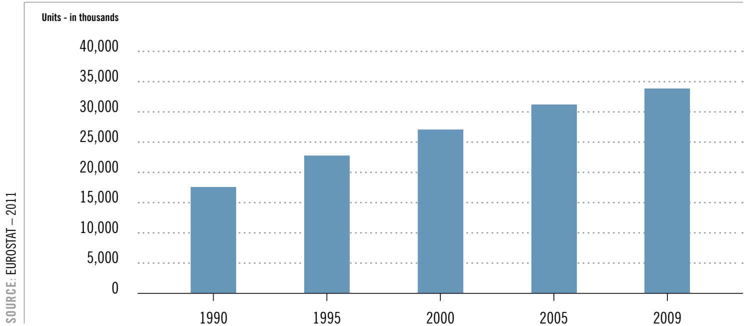
SOURCE: ANFAC, ACEA – 2011

EU vehicle fleet development

EU Passenger Car Fleet | **1990 – 2009**

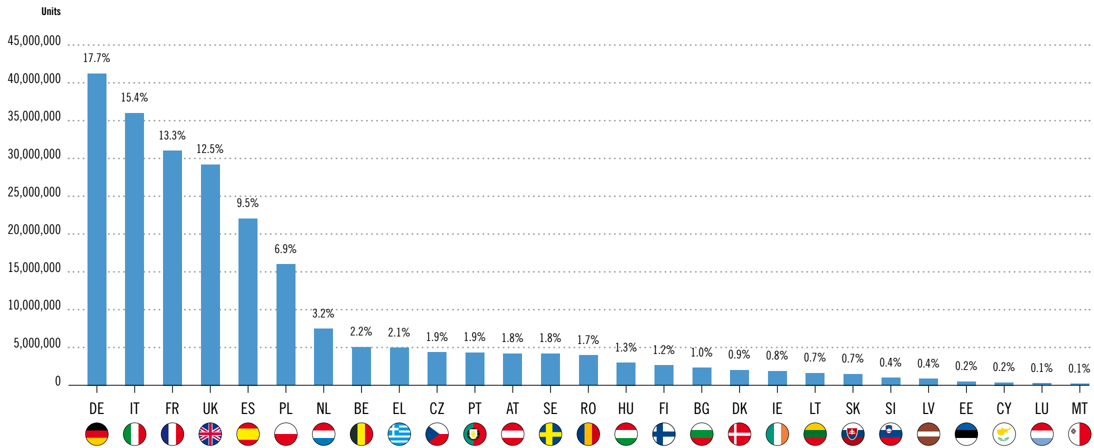


EU Commercial Vehicle Fleet | **1990 – 2009**



Vehicle spread in the EU

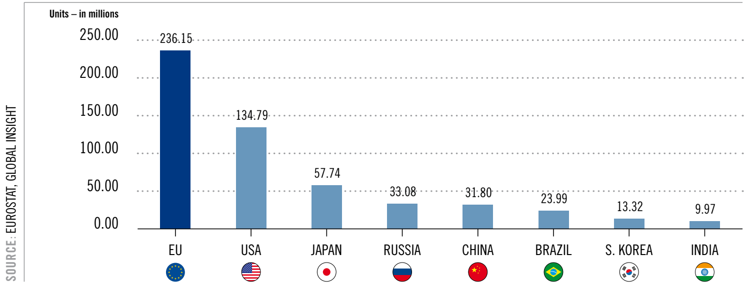
Car Fleet by Country (in units and % share) | **2009**



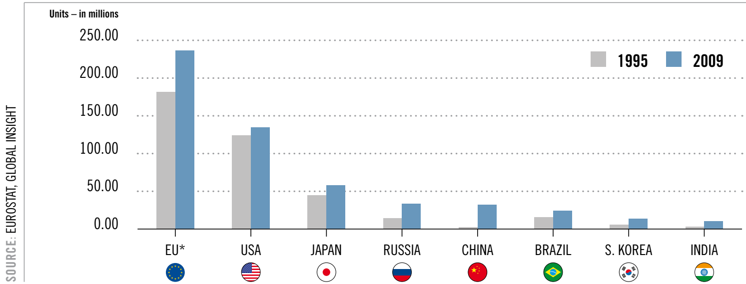
SOURCE: EUROSTAT – 2011

International comparison

Car Fleet (in Mn) | 2009



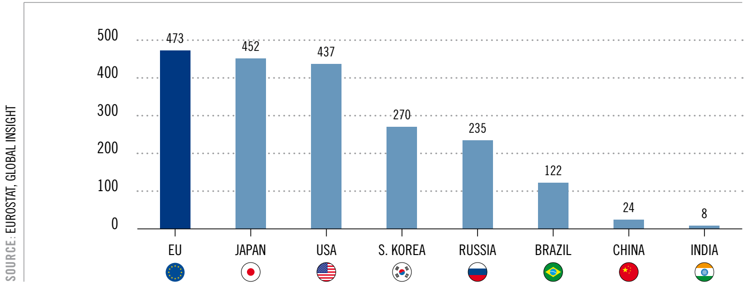
Car Fleet Growth (in Mn) | 1995-2009



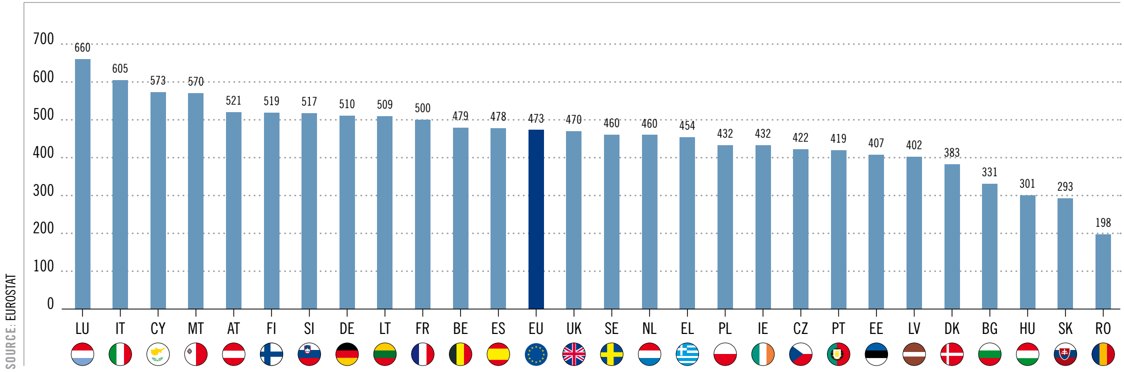
* 27 countries included over the whole period

Trends in motorisation

Car Density in the World (cars per 1,000 inhabitants) | **2009**



Car Density in the EU (cars per 1,000 inhabitants) | **2009**



5

Trade

2011

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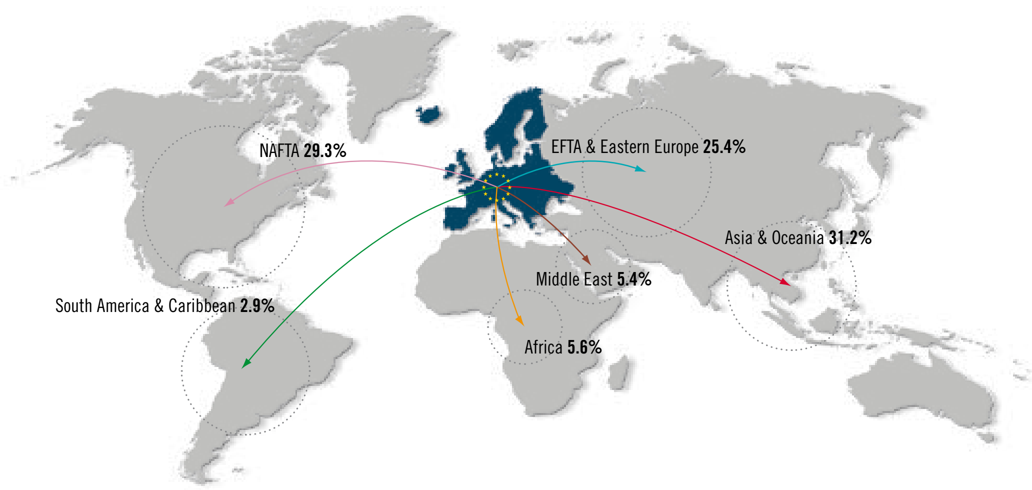
The EU automotive industry is a formidable exporter

EU Exports of Passenger Cars (in value)



SOURCE: EUROSTAT – 2010

EU Motor Vehicle Trade (in € Mn)

TRADE IN VALUE (€MN)	YEAR 2009 IMPORTS	YEAR 2009 EXPORTS	YEAR 2009 TRADE BALANCE	YEAR 2010 IMPORTS	YEAR 2010 EXPORTS	YEAR 2010 TRADE BALANCE	% CHG 10/09 IMPORTS	% CHG 10/09 EXPORTS	% CHG 10/09 TRADE BALANCE
Passenger Cars	21,965	48,240	26,275	22,006	76,460	54,454	0.2%	58.5%	107.2%
Commercial Vehicles (up to 5t)	2,567	1,897	-670	3,461	3,220	-241	34.8%	69.7%	-64.0%
Commercial Vehicles (over 5t) + Buses & Coaches	798	2,514	1,716	716	3,616	2,900	-10.3%	43.8%	69.0%
TOTAL	**25,330**	**52,651**	**27,321**	**26,183**	**83,296**	**57,113**	**3.4%**	**58.2%**	**109.0%**

SOURCE: EUROSTAT

EU Motor Vehicle Trade (in units)

TRADE IN VOLUME (UNITS)	YEAR 2009 IMPORTS	YEAR 2009 EXPORTS	YEAR 2010 IMPORTS	YEAR 2010 EXPORTS	% CHG 10/09 IMPORTS	% CHG 10/09 EXPORTS
Passenger Cars	2,285,770	3,461,619	2,221,532	4,266,198	-2.8%	23.2%
Commercial Vehicles (up to 5t)	245,573	223,030	317,223	331,700	29.2%	48.7%
Commercial Vehicles (over 5t) + Buses & Coaches	61,791	54,674	29,194	123,820	-52.8%	126.5%
TOTAL	**2,593,134**	**3,739,323**	**2,567,949**	**4,721,718**	**-1.0%**	**26.3%**

SOURCE: EUROSTAT

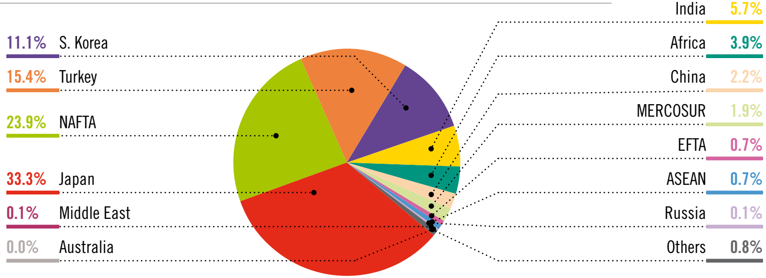
Most imports to the EU come from Japan

Origin of most EU Passenger Car **Imports (in € Mn)**

	2007	2008	2009	2010	% CHG 10/09	% CHG 09/08	% CHG 08/07	% SHARE IN 2010
World	33,772	30,053	21,965	22,006	0.2%	-26.9%	-11.0%	100.0%
Japan	12,031	10,818	8,112	7,337	-9.6%	-25.0%	-10.1%	33.3%
United States	6,395	6,036	2,992	3,533	18.1%	-50.4%	-5.6%	16.1%
Turkey	4,206	3,676	3,194	3,394	6.3%	-13.1%	-12.6%	15.4%
Korea South	6,691	3,945	2,610	2,446	-6.3%	-33.8%	-41.0%	11.1%
Mexico	1,992	2,405	1,499	1,644	9.7%	-37.7%	20.7%	7.5%
India	335	585	1,537	1,265	-17.7%	162.9%	74.7%	5.7%
South Africa	70	300	469	845	80.2%	56.4%	327.5%	3.8%
China	505	562	360	481	33.6%	-35.9%	11.3%	2.2%
Brazil	567	808	539	390	-27.6%	-33.4%	42.7%	1.8%
Thailand	139	176	110	135	23.2%	-37.7%	26.3%	0.6%

SOURCE: EUROSTAT

Passenger Cars – Origin of EU **Imports (in value) | 2010**



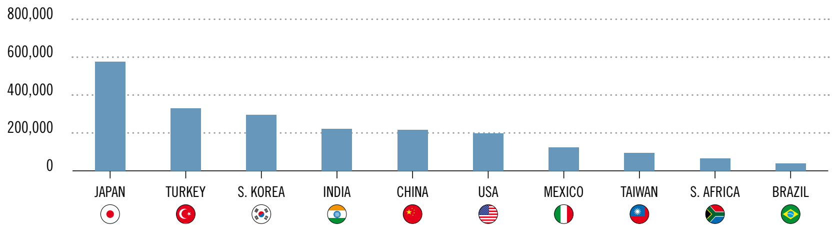
SOURCE: EUROSTAT

Origin of most EU Passenger Car **Imports (in units)**

	2007	2008	2009	2010	% CHG 10/09	% CHG 09/08	% CHG 08/07	% SHARE IN 2010
World	3,436,549	3,003,472	2,285,770	2,221,532	-2.8%	-23.9%	-12.6%	100.0%
Japan	965,959	867,493	667,325	575,057	-13.8%	-23.1%	-10.2%	25.9%
Turkey	385,727	411,563	314,544	330,226	5.0%	-23.6%	6.7%	14.9%
South Korea	651,333	446,552	351,264	294,108	-16.3%	-21.3%	-31.4%	13.2%
India	119,630	99,540	265,891	220,404	-17.1%	167.1%	-16.8%	9.9%
China	391,676	303,265	177,101	214,974	21.4%	-41.6%	-22.6%	9.7%
United States	460,220	371,958	163,418	197,149	20.6%	-56.1%	-19.2%	8.9%
Mexico	152,007	183,650	116,324	124,124	6.7%	-36.7%	20.8%	5.6%
Taiwan	122,466	136,677	73,893	93,372	26.4%	-45.9%	11.6%	4.2%
South Africa	3,913	20,520	31,395	65,250	107.8%	53.0%	424.4%	2.9%
Brazil	63,798	53,084	47,216	37,042	-21.5%	-11.1%	-16.8%	1.7%

SOURCE: EUROSTAT

Passenger Cars – Origin of EU **Imports (in units) | 2010**



SOURCE: EUROSTAT

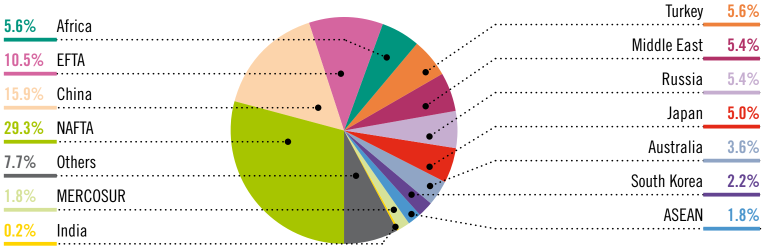
Car shipments to the USA represent over a quarter of EU car exports (in value)

Main Destinations of EU Passenger Car **Exports** (in € Mn)

	2007	2008	2009	2010	% CHG 10/09	% CHG 09/08	% CHG 08/07	% SHARE IN 2010
World	71,025	69,562	48,240	76,460	58.5%	-30.7%	-2.1%	100.0%
United States	24,754	20,546	12,812	19,156	49.5%	-37.6%	-17.0%	25.1%
China	3,345	4,610	5,477	12,181	122.4%	18.8%	37.8%	15.9%
Switzerland	4,324	4,363	3,943	5,277	33.8%	-9.6%	0.9%	6.9%
Turkey	2,835	2,808	2,067	4,260	106.1%	-26.4%	-1.0%	5.6%
Russia	6,659	8,786	2,577	4,098	59.0%	-70.7%	31.9%	5.4%
Japan	4,121	3,254	2,716	3,843	41.5%	-16.5%	-21.0%	5.0%
Australia	2,101	2,187	1,614	2,767	71.4%	-26.2%	4.1%	3.6%
Norway	2,703	2,192	1,867	2,733	46.4%	-14.8%	-18.9%	3.6%
Canada	2,094	2,085	1,818	2,442	34.3%	-12.8%	-0.4%	3.2%
Korea South	975	912	806	1,681	108.7%	-11.7%	-6.4%	2.2%

SOURCE: EUROSTAT

Passenger Cars – Destination of EU **Exports** (in value) | 2010



SOURCE: EUROSTAT

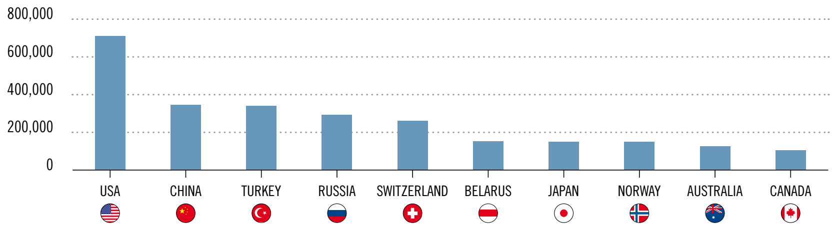
Over 16% of EU exported cars set sail to the USA

Main Destinations of EU Passenger Car **Exports** **(in units)**

	2007	2008	2009	2010	% CHG 10/09	% CHG 09/08	% CHG 08/07	% SHARE IN 2010
World	5,069,862	4,854,621	3,461,619	4,266,198	23.2%	-28.7%	-4.2%	100.0%
United States	988,449	875,953	548,853	710,301	29.4%	-37.3%	-11.4%	16.6%
China	100,480	136,567	173,042	345,573	99.7%	26.7%	35.9%	8.1%
Turkey	225,785	223,463	170,647	340,026	99.3%	-23.6%	-1.0%	8.0%
Russia	533,780	675,312	178,999	291,576	62.9%	-73.5%	26.5%	6.8%
Switzerland	244,539	234,076	204,801	260,180	27.0%	-12.5%	-4.3%	6.1%
Belarus	100,963	119,212	111,737	151,708	35.8%	-6.3%	18.1%	3.6%
Japan	213,709	161,750	115,005	150,687	31.0%	-28.9%	-24.3%	3.5%
Norway	153,320	124,422	112,173	149,305	33.1%	-9.8%	-18.8%	3.5%
Australia	111,435	110,082	84,754	125,961	48.6%	-23.0%	-1.2%	3.0%
Canada	90,609	103,466	87,839	103,616	18.0%	-15.1%	14.2%	2.4%

SOURCE: EUROSTAT

Destination of EU Passenger Car **Exports** **(in units)** | **2010**



SOURCE: EUROSTAT

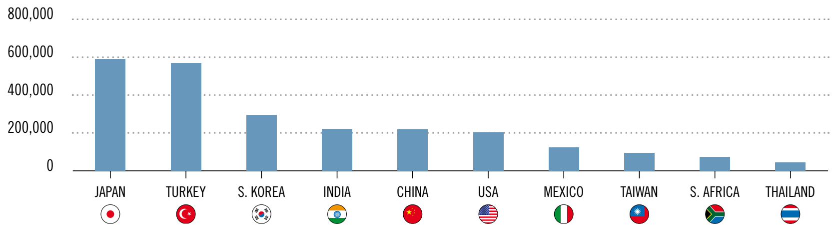
A closer look at imports of all vehicle categories

Origin of most EU Motor Vehicle **Imports** (in units)

	2007	2008	2009	2010	% CHG 10/09	% CHG 09/08	% CHG 08/07	% SHARE IN 2010
World	3,829,276	3,449,222	2,589,189	2,563,101	-1.0%	-24.9%	-9.9%	100.0%
Japan	988,493	894,296	682,501	589,150	-13.7%	-23.7%	-9.5%	23.0%
Turkey	621,373	716,973	497,826	568,333	14.2%	-30.6%	15.4%	22.2%
Korea South	655,420	452,356	353,545	296,064	-16.3%	-21.8%	-31.0%	11.6%
India	121,276	102,124	267,291	221,858	-17.0%	161.7%	-15.8%	8.7%
China	392,519	304,877	226,336	218,876	-3.3%	-25.8%	-22.3%	8.5%
United States	469,384	382,521	168,495	203,164	20.6%	-56.0%	-18.5%	7.9%
Mexico	152,046	183,689	116,334	124,139	6.7%	-36.7%	20.8%	4.8%
Taiwan	122,555	136,692	73,894	93,372	26.4%	-45.9%	11.5%	3.6%
South Africa	25,092	35,321	38,866	74,046	90.5%	10.0%	40.8%	2.9%
Thailand	82,882	62,679	35,684	44,351	24.3%	-43.1%	-24.4%	1.7%

SOURCE: EUROSTAT

Origin of EU Motor Vehicle **Imports** (in units) | 2010



SOURCE: EUROSTAT

Trade

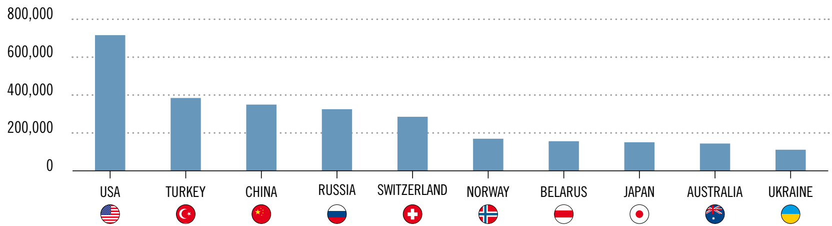
A closer look at exports of all vehicle categories

Main Destinations of EU Motor Vehicle **Exports** **(in units)**

	2007	2008	2009	2010	% CHG 10/09	% CHG 09/08	% CHG 08/07	% SHARE IN 2010
World	5,642,020	5,403,264	3,823,265	4,798,774	25.5%	-29.2%	-4.2%	100.0%
United States	997,593	882,134	551,695	716,183	29.8%	-37.5%	-11.6%	14.9%
Turkey	258,557	256,330	188,838	384,508	103.6%	-26.3%	-0.9%	8.0%
China	103,541	138,147	174,953	349,727	99.9%	26.6%	33.4%	7.3%
Russia	609,721	735,978	194,332	325,213	67.3%	-73.6%	20.7%	6.8%
Switzerland	268,413	259,625	225,629	285,353	26.5%	-13.1%	-3.3%	5.9%
Norway	177,437	146,063	124,594	169,432	36.0%	-14.7%	-17.7%	3.5%
Belarus	109,411	128,884	119,302	156,216	30.9%	-7.4%	17.8%	3.3%
Japan	213,999	161,838	115,085	150,805	31.0%	-28.9%	-24.4%	3.1%
Australia	140,202	136,913	96,956	144,061	48.6%	-29.2%	-2.3%	3.0%
Ukraine	199,340	155,302	39,550	111,389	181.6%	-74.5%	-22.1%	2.3%

SOURCE: EUROSTAT

Destination of EU Motor Vehicle **Exports** **(in units)** | **2010**



SOURCE: EUROSTAT

Taxation

2011

THE AUTOMOBILE INDUSTRY POCKET GUIDE

EUROPEAN
AUTOMOBILE
MANUFACTURERS
ASSOCIATION

ACEA

19 Member States levy CO_2-related taxation on cars

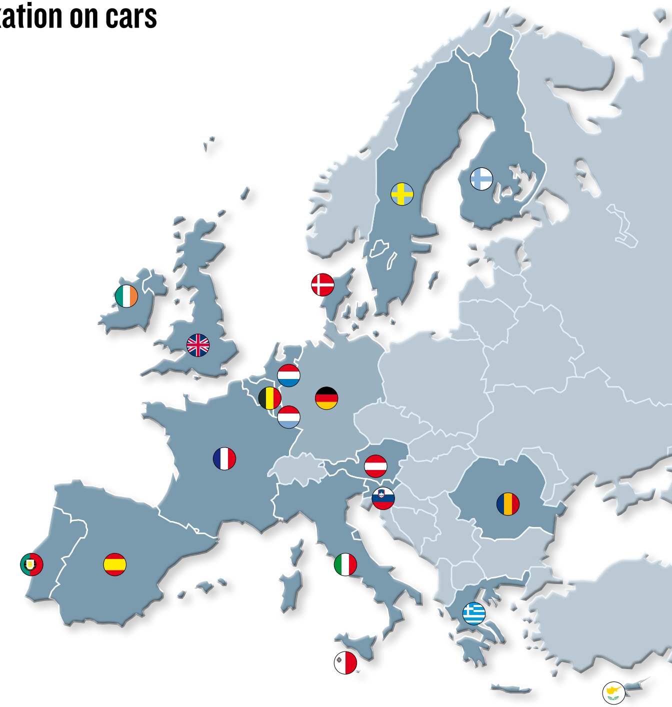
CO_2 taxation for passenger cars is well established across the European Union. 19 EU Member States currently apply some form of CO_2 tax to the registration and/or ownership of passenger cars, up from 17 in 2010.

In addition, an increasing number of countries – 16 EU Member States at present – provide purchase incentives and/or tax benefits for electric and/or hybrid electric vehicles.

The 19 EU countries that levy passenger car taxes partially or totally based on the car's carbon dioxide (CO_2) emissions and/or fuel consumption are: Austria, Belgium, Cyprus, Denmark, Finland, France, Germany, Greece, Ireland, Latvia, Luxembourg, Malta, the Netherlands, Portugal, Romania, Slovenia, Spain, Sweden and the United Kingdom.

In 2010, 17 Member States had CO_2-related taxation, up from 16 in 2009, 14 in 2008 and 11 in 2007.

The European car industry supports the further introduction of fiscal incentives for fuel efficiency. Tax measures are an important tool in shaping consumer demand towards fuel-efficient cars, and help create a market for breakthrough technologies, notably during the introduction phase.



SOURCE: ACEA TAX GUIDE 2011

Fiscal Income from the Motor Vehicles in the EU*

	AT	BE	DK	FI	FR	DE	EL	IE	IT	NL	PT	ES	SE	UK
	€ bn 2009	€ bn 2008	DKK bn 2009	€ bn 2009	€ bn 2009	€ bn 2009	€ bn 2009	€ bn 2010	€ bn 2009	€ bn 2009	€ bn 2010	€ bn 2009	SEK bn 2010	£ bn 2009
Purchase or transfer														
1. VAT on vehicles, servicing/ repair parts, tyres	2.200	3.054	N.A.	1.262	13.604	26.440	N.A.	0.120	18.550	1.287	2.247	3.823	18.500	12.500
New vehicle sales		1.431			7.601	19.100	0.576			0.552		2.257		
Second-hand vehicle sales		0.081			0.566	1.900				0.096		0.027		
Services and repair + tyres		1.637			5.437	4.100				0.735				
Accessories and spare parts		0.905			-	1.340						1.538		
2. Fuels & Lubricants	5.027	6.073	15.000	3.207	32.261	39.931	3.293	2.604	33.909	7.344	1.938	17.046	50.500	25.890
3. Sales & registration taxes	0.430	0.358	12.001	0.816	1.919		0.473	0.702	1.175	2.150	0.797	0.724		
Annual ownership taxes	1.575	1.401	9.827	0.639	1.270	8.550	1.045	1.026	6.510	3.341	0.360	2.706	12.700	5.630
Driving license fees		0.007			-	0.010				0.241		0.110		
Insurance taxes	0.320	0.462	1.855	0.267	3.934	3.610			4.095			0.699	3.100	
Tolls	1.356		0.428		9.350				1.260					
Customs duties		0.093			-	0.492					0.074			
Other taxes	0.593	0.589			1.201	0.780	0.040		4.650	0.819	0.968	0.362	6.500	
TOTAL	**11.501**	**16.091**	**39.111**	**6.191**	**77.143**	**106.253**	**5.427**	**4.452**	**70.149**	**16.565**	**6.384**	**29.292**	**91.300**	**44.020**
EURO	**11.5**	**16.1**	**5.2**	**6.2**	**77.1**	**106.3**	**5.4**	**4.5**	**70.1**	**16.6**	**6.4**	**29.3**	**10.3**	**48.8**
GRAND TOTAL = € 413.7 BN														

*no data available for other EU Member States

SOURCE: ACEA – 2011

Share of VAT in Net Price of the Car

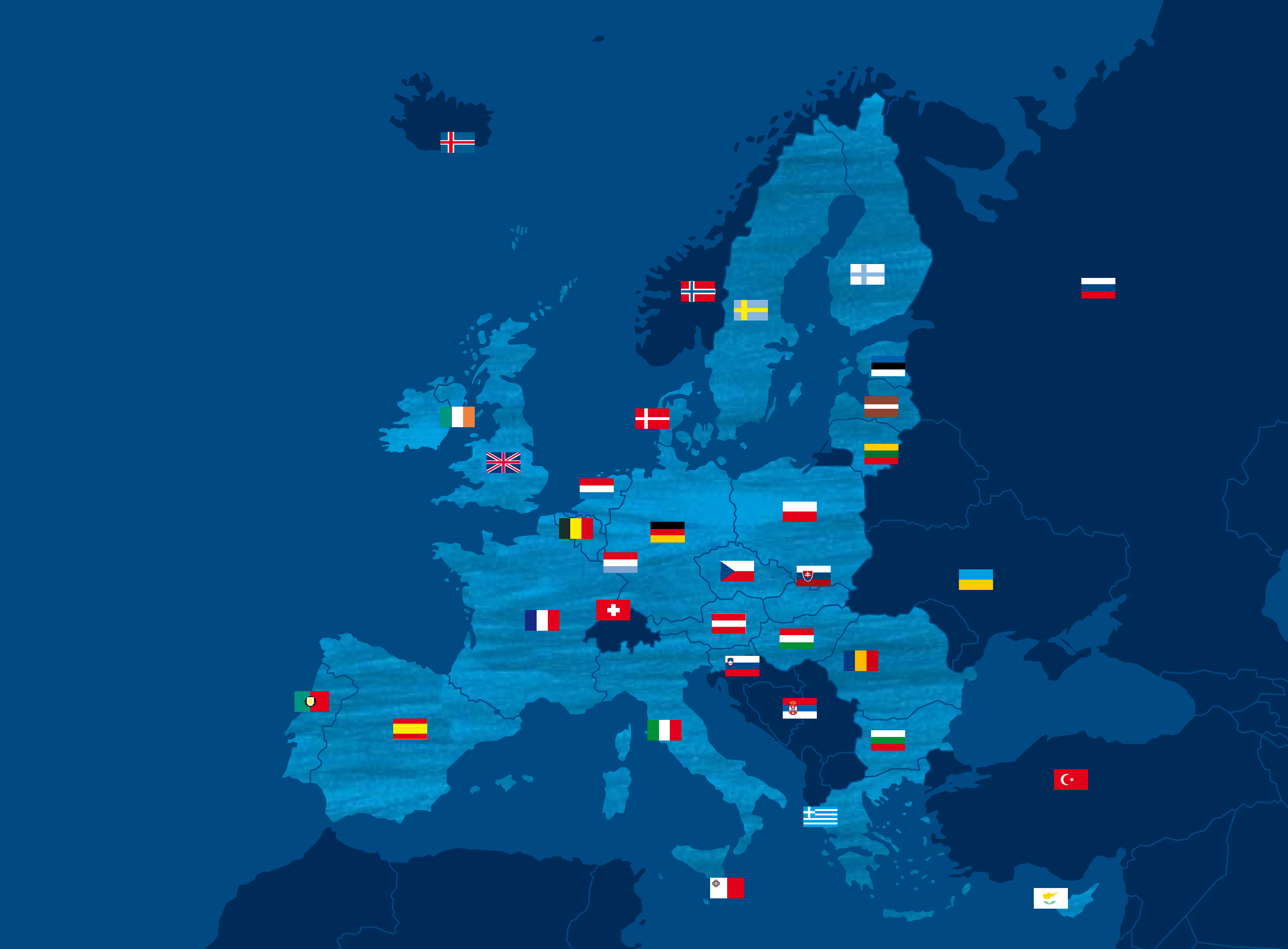
Denmark	25 %
Hungary	25 %
Sweden	25 %
Romania	24 %
Finland	23 %
Greece	23 %
Poland	23 %
Portugal	23 %
Belgium	21 %
Ireland	21 %
Lithuania	21 %
Latvia	21 %
Austria	20 %
Bulgaria	20 %
Czech Republic	20 %
Estonia	20 %
Italy	20 %
Slovenia	20 %
UK	20 %
France	19.6 %
Germany	19 %
Netherlands	19 %
Slovakia	19 %
Malta	18 %
Spain	18 %
Cyprus	15 %
Luxembourg	15 %

SOURCE: ACEA – 2011

Excise Duties on Fuels in € / 1,000 litres

	AT	BE	BG	CY	CZ	DK	EE	FI	FR	DE	EL	HU	IE	IT	LV	LT	LU	MT	NL	PL	PT	RO	SK	SI	ES	SE	UK	**EU** minimum rates
Unleaded Petrol	442	614	350	359	505	571	423	627	607	655	610	444	543	564	380	287	462	459	714	390	583	348	514	514	425	542	617	359
Diesel	347	335	307	330	431	386	393	364	428	470	382	360	449	423	274	245	302	352	421	302	364	293	368	425	331	425	617	330

SOURCE: ACEA – 2011



AT	Austria
BE	Belgium
BG	Bulgaria
CH	Switzerland
CY	Cyprus
CZ	Czech Republic
DE	Germany
DK	Denmark
EE	Estonia
EL	Greece
ES	Spain
FI	Finland
FR	France
HU	Hungary
IE	Ireland
IS	Iceland
IT	Italy
LT	Lithuania
LU	Luxembourg
LV	Latvia
MT	Malta
NL	Netherlands
NO	Norway
PL	Poland
PT	Portugal
RO	Romania
RS	Serbia
RU	Russia
SE	Sweden
SI	Slovenia
SK	Slovakia
TR	Turkey
UA	Ukraine
UK	United Kingdom

EUROPE	EU27 + EFTA
EFTA	Iceland + Norway + Switzerland
NAFTA	USA + Canada + Mexico
BRIC	Brazil + Russia + India + China
MERCOSUR	Argentina + Brazil + Paraguay + Uruguay
ASEAN	Brunei + Indonesia + Malaysia + Philippines + Singapore + Thailand + Vietnam
CIS	Commonwealth of Independent States: Armenia + Azerbaijan + Belarus + Kazakhstan + Uzbekistan + Tajikistan + Kyrgyzstan + Moldavia + Ukraine + Russia

EC	European Commission
CAFE	Clean Air for Europe
EEA	European Environment Agency
OECD	Organisation for Economic Cooperation and Development
AAA	Association Auxiliaire de l'Automobile
VDA	Verband der Automobilindustrie
OICA	Organisation Internationale des Constructeurs d'Automobiles

CARS

PC Passenger Cars

VANS

LCV Light Commercial Vehicles + minibus / coaches ≤ 3.5t

TRUCKS

CV MCV + HCV

MCV Medium Commercial Vehicles > 3.5t but ≤ 16t

HCV Heavy Commercial Vehicles > 16t

BUSES + COACHES

B&C Buses > 3.5t

MOTOR VEHICLES

MV Cars + Vans + Trucks + Buses & Coaches

SPORT UTILITY VEHICLES

SUV off-road passenger cars (4X4)

PM	particulate matter
CO	carbon monoxide
NO_x	nitrogen oxides
CO_2	carbon dioxide
Mn	million
g	gramme
tkm	tonne-kilometre
GCW	gross combined weight
Bn	billion
t	tonne
pkm	passenger-kilometre
GPD	gross domestic product

Avenue des Nerviens 85
B–1040 Brussels
T +32 2 732 55 50
info@acea.be

ACEA

EUROPEAN
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www.acea.be