2012

THE AUTOMOBILE INDUSTRY POCKET GUIDE

EUROPEAN AUTOMOBILE MANUFACTURERS ASSOCIATION

ACEA

PUBLISHED BY

ACEA Communications department
Please order your personal copy via communications@acea.be

STATISTICS COMPILED BY

Quynh-Nhu HUYNH, Director Economics & Statistics
Please direct enquiries to statistics@acea.be

This paper is made in an environmentally-friendly way and according to FSC certification

Foreword

The automotive industry is a key contributor to the European economy and society. The ongoing economic turmoil we have been facing over the last years has shown the importance of maintaining a strong manufacturing base in the EU because of its strengh as a source of growth and jobs.

The European vehicle manufacturers are global players, driving innovation towards cleaner, safer, and more sustainable transport. In an increasingly fierce global environment, it is crucial that our industry retain and improve its competitiveness both in the EU and worldwide. The European regulatory framework, as well as industrial and trade policy, plays a decisive role in this respect. ACEA maintains a continuous dialogue with policy makers and other stakeholders in the EU, and provides expert knowledge and industry statistics.

Since its first publication five years ago, the "Automobile Industry Pocket Guide" has become a demanded and valued tool for all those interested in automotive industry issues and policies. This 2012 edition contains the latest key figures on employment and trade, as well as vehicle production, registration, use and taxation. As in the previous versions of the guide, the information is presented with graphs, tables and charts, giving the reader a concise snapshot of our sector.

Ivan Hodac
Secretary General ACEA

I

About ACEA

2012 THE AUTOMOBILE INDUSTRY POCKET GUIDE

EUROPEAN
AUTOMOBILE
MANUFACTURERS
ASSOCIATION

ACEA

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 S.p.A, Ford of Europe, General Motors Europe, Hyundai Motor Europe, IVECO S.p.A, Jaguar Land Rover, Porsche, PSA Peugeot Citroën, Renault Group, Scania, Toyota Motor Europe, Volkswagen Group, Volvo Cars and Volvo Group.
- 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 S.p.A, 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, promoting understanding of the sector's importance, complexity and contribution to society.

* Status 1/07/2012

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 Europeans' lives, from employment and social benefits to education, innovation, investment, and product and mobility concepts.

- More than 12 million families depend on the sector for employment;
- ACEA members operate 177 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 €75 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.

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 cornerstone 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);
- Full 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 into products, processes and systems at 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 & Aftermarket
Peter Kunze

Director Legal & Taxation
Marc Greven

Director Mobility & Sustainable Transport
Petr Dolejsi

Director Parliamentary Affairs
Céline Domecq

Director Regulatory Affairs
Eskil Steresson

Director Economics & Statistics
Quynh-Nhu Huynh

Director Technical Affairs
Dolf Lamerigts

Director Trade & Economics
Erik Bergelin

Director Transport Policy
Fuensanta Martinez-Sans

Director Safety
n/a

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

Director Communications
Cara McLaughlin

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

ACEA Members

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

HYUNDAI MOTOR EUROPE GmbH
Kaiserleipromenande 5
D-63067 Offenbach am Main
T. +49 69 271 4720
www.hyundai-europe.com

IVECO S.p.A.
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

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

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

SCANIA AB
(as ACEA CV-BOD member)
S–151 87 Sodertalje
T. +46 8 55 38 10 00
www.scania.com

MAN Truck & Bus AG
(as ACEA CV-BOD member)
Postfach 50 06 20
D–80995 München
T. +49 891 580 01
www.mantruckandbus.com

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
SOCIETÀ PER AZIONI

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

Ford

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 11-13
B–1050 Brussels
T. +32 2 773 69 82

HYUNDAI

HYUNDAI Motor Group Brussels Office
Rue de la Loi 227
B–1040 Brussels
T. +32 2 205 03 60

IVECO

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

Jaguar Land Rover Brussels Office
Rue Abbé Cuypers 3
B–1040 Brussels
T. +32 2 741 24 60

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

Renault European Affairs
Avenue des Arts 40
B–1040 Brussels
T. +32 2 274 10 00

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

MAN Truck & Bus AG Brussels Office
(as ACEA CV-BOD member)
Rue Jacques de Lalaing 4
B–1040 Brussels
T. +32 2 230 41 95

Scania EU Representation
(as ACEA CV-BOD member)
c/o Kreab Gavin Anderson
Avenue de Tervueren 2
B–1040 Brussels
T. +32 2 737 69 02

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 of the 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
Thán Károly u.3-5
H – 1119 Budapest
T. +36 1 371 5874
F. +36 1 371 5874
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
Iberia Mart II Calle Orense 34
E–28020 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
President Kennedylaan 925
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 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 research & innovation.
Together with its members, EUCAR drives strategy and assessment of collaborative automotive research and innovation, and establishes common work with the European Commission, member states and other key stakeholders. These activities facilitate the participation by EUCAR's members in high quality projects with industrially relevant results. 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 and Manufacturing
- Integrated Safety
- Mobility and Transport

II

Key Figures

2012

THE AUTOMOBILE INDUSTRY POCKET GUIDE

EUROPEAN
AUTOMOBILE
MANUFACTURERS
ASSOCIATION

ACEA

Key Figures

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** million direct jobs and another **10** 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 **24%** of world 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 ACEA car, truck and bus manufacturers operate 210 vehicle assembly and engine production plants in 22 countries across Europe, among which 177 in 16 EU Member States, often sustaining the economic fabric of entire cities and regions.

Global Scope

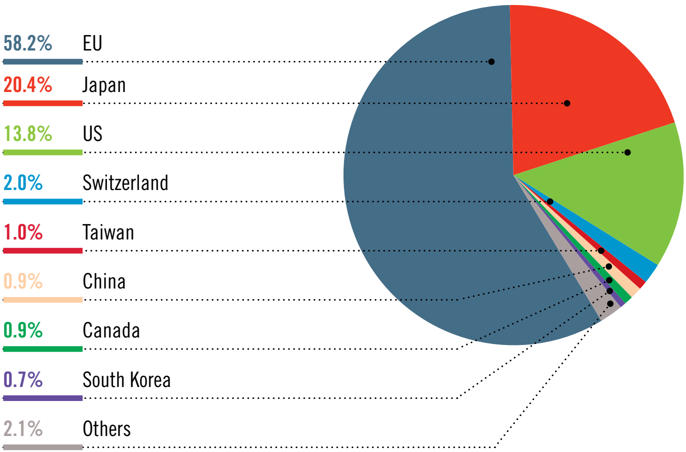
The automobile industry is a leading EU export sector with a net trade contribution of € 75 billion. Leading in high-quality products, the industry sells and produces vehicles in all major world markets.

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.

A highly innovative sector

Patent Applications filed by the Automotive Sector | **2011**



In **2011**,
a total of **8,568** patents
were filed in the automotive sector
at the European Patent Office

SOURCE: BASED ON EPO (EUROPEAN PATENT OFFICE) DATA - 2012

Key figures

PRODUCTION	Total Motor Vehicles (Worldwide)	2011	80.1m units	
	Total Motor Vehicles (EU27)	2011	17.7m units	= 22% of worldwide MV production
	Total Passenger Cars (Worldwide)	2011	59.9m units	
	Total Passenger Cars (EU27)	2011	15.7m units	= 26% of worldwide PC production
	Production value	2009	€522 bn	
NEW REGISTRATIONS	Total MV (Worldwide)	2011	78.5m units	
	Total MV (EU27)	2011	15.1m units	= 19% of worldwide MV registrations/sales
	Total Passenger Cars (Worldwide)	2011	65.4m units	
	Total Passenger Cars (EU27)	2011	13.1m units	= 20% of worldwide PC registrations/sales
	Diesel (Western Europe)	2011	56 %	
EMPLOYMENT	Manufacture of Motor Vehicles (EU27)	2010	2.0m people	= 6% of EU manufacturing
	Total (including indirect, EU27)	2009	11.6m people	= 5% of EU employed population
TURNOVER	Manufacture of Motor Vehicles (EU27)	2009	€625.0 bn	
R&D INVESTMENT	ACEA members	2009	€26.0 bn	=5% of turnover
VALUE ADDED	EU27	2009	€99.0 bn	= 7% of manufacturing sector
EXPORTS	Extra-EU27	2011	€104.0 bn	
IMPORTS	Extra-EU27	2011	€28.7 bn	
TRADE BALANCE		2011	€75.3 bn	
MV IN USE (PARC)	Total Motor Vehicles	2010	273.7m units	
(EU27)	Passenger Cars	2010	238.8m units	
	Motorisation rate (cars)	2010	477 per 1,000 inhab.	
TAX REVENUE FROM MOTOR VEHICLES (EU15)		2011	€375.1 bn	= 3.3% of EU15 GDP

W.EUROPE = EU15 + EFTA

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

Employment

2012 THE AUTOMOBILE INDUSTRY POCKET GUIDE

EUROPEAN AUTOMOBILE MANUFACTURERS ASSOCIATION

ACEA

The automotive industry creates 11.6m jobs in the EU

Automobile Sector: Direct and Indirect* Employment

AUTOMOTIVE INDUSTRY (PRODUCTION OPERATIONS) [1] (OEMs)	
› Automobile manufacturing	(NACE dm341)
› Coachwork, trailers, caravans	(NACE dm342)
› Equipment and accessories	(NACE dm343)
OTHER MANUFACTURING ACTIVITIES [2] (Suppliers)	
› Manufacture of rubber tyres and tubes	(NACE dh2511)
› 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 [3] (Services)	
› Sale of motor vehicles	(NACE g451)
› Maintenance and repair of motor vehicles	(NACE g452)
› Sale of motor vehicle parts and accessories	(NACE g453)
› Renting and leasing of motor vehicles	(NACE n771)
TRANSPORT [3] (Services)	
› Passenger land transport (urban & suburban, taxi)	(NACE h493)
› Freight transport by road	(NACE h4941)

- Automotive industry (production operations): 2.0m Jobs direct
- Other manufacturing activities: 1.2m Jobs indirect
- Automobile use: 3.4m Jobs
- Transport: 5.0m Jobs
- Automotive industry + other manufacturing activities: 3.2m Jobs manufacturing
- Automobile use + transport: 8.4m Jobs non-manufacturing
- Other manufacturing activities + automobile use + transport: 9.6m Jobs indirect
- Total 11.6m Jobs

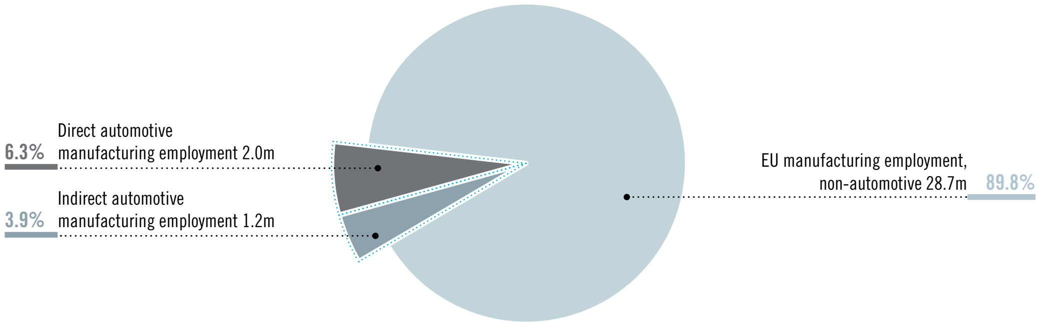
* Indirect employment data does not report employment in raw material sector (e.g. steel, aluminium, glass, etc.), textile, driving schools, licensing activities, vehicle testing, vehicle insurance and financing, etc.

SOURCE: BASED ON EUROSTAT MOST RECENT DATA AVAILABLE, (1) 2010; (2) 2007; (3) 2009

1

10.2% of EU's manufacturing employment is automotive

Manufacturing Employment in the EU



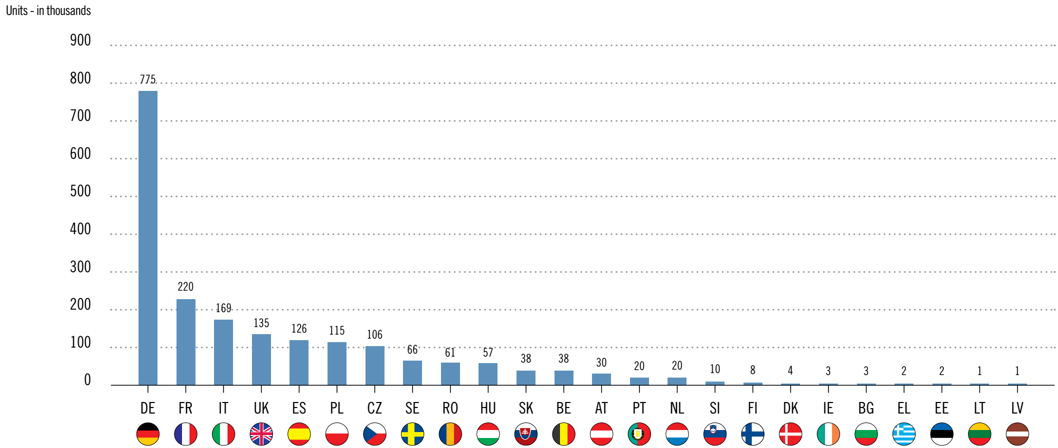
BASED ON EUROSTAT DATA – 2009

Direct automotive employment (manufacturing)	**2.0m people**	= 6.3% of total EU employment in manufacturing
Manufacturing employment related to the automotive sector*	**3.2m people**	= 10.2% of total EU employment in manufacturing
Total automotive employment (manufacturing and services*)	**11.6m people**	= 5.3% of EU employed population
EU27 total population	**498.0m people**	
EU27 total employment	**217.5m people**	
EU27 employed population in the manufacturing sector	**31.2m people**	= 14.4% of total employed population

BASED ON EUROSTAT MOST RECENT DATA AVAILABLE, 2009

* in activities specified

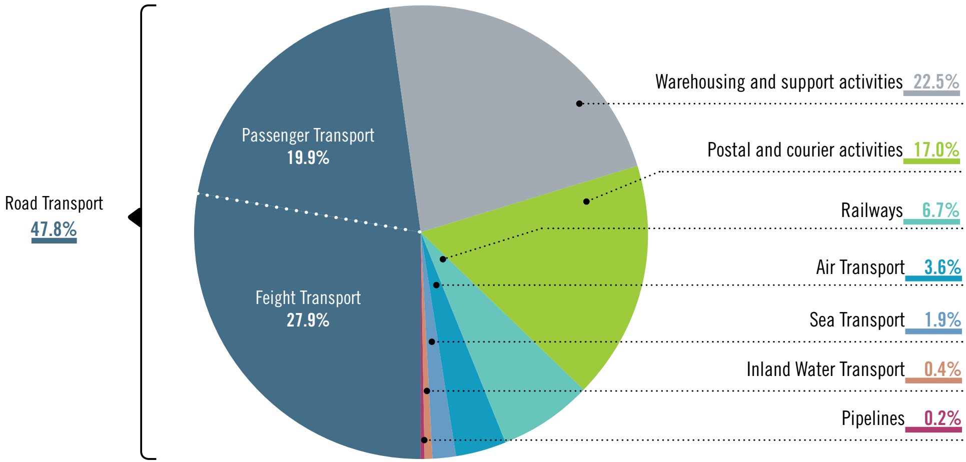
Direct Automotive Employment - by country | **2010**



BASED ON EUROSTAT DATA, 2010

Each direct job creates at least another 5 related jobs

Employment* - by mode of transport | **2009**



BASED ON EUROSTAT DATA - 2009

* Employment in companies the main activity of which lies in the transport mode concerned

Production

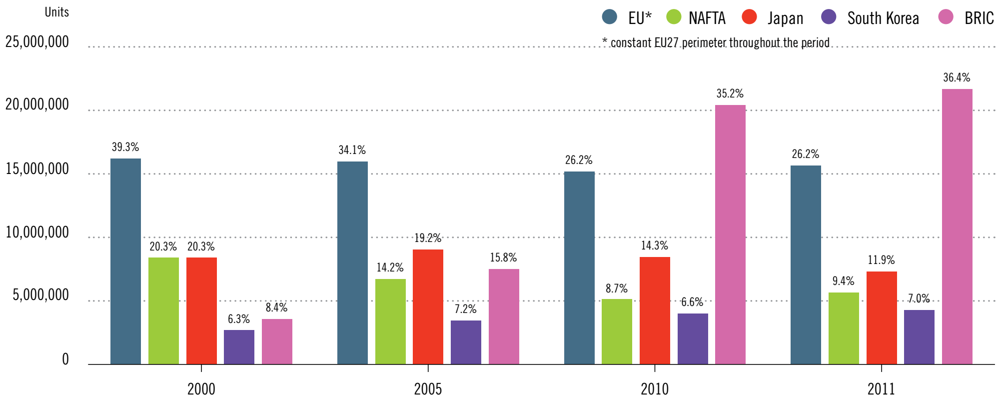
2012 THE AUTOMOBILE INDUSTRY POCKET GUIDE

EUROPEAN
AUTOMOBILE
MANUFACTURERS
ASSOCIATION

ACEA

World Evolution of Car Production

Passenger Car Production - International Comparison (% share) | 2000 – 2011



SOURCE: OICA - 2012

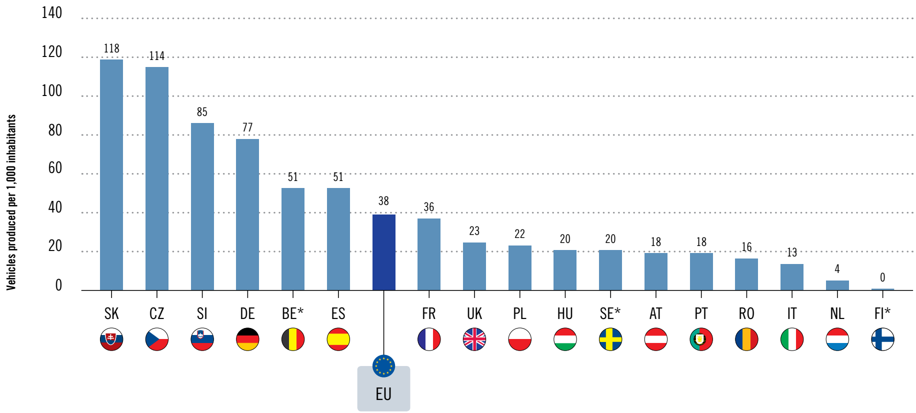
Passenger Car Production World | 2011

	VOLUME	% SHARE
EU	15,701,685	26.2%
NAFTA	5,613,696	9.4%
Japan	7,158,525	11.9%
South Korea	4,221,617	7.0%
BRIC	21,811,894	36.4%
Total World	**59,929,016**	**100%**

SOURCE: OICA – 2012

The EU produces 38 vehicles per 1,000 inhabitants

Motor Vehicle Production per 1,000 inhabitants | **2011**



* only car production available in 2011

SOURCE: EUROSTAT; ACEA – 2012

Automobile Assembly & Production Plants in Europe

Overview for ACEA Members

	EU		Plants
	AT	Austria	5
	BE	Belgium	5
	CZ	Czech republic	6
	DE	Germany	46
	ES	Spain	13
	FR	France	29
	HU	Hungary	4
	IT	Italy	17
	NL	Netherlands	3
	PL	Poland	11
	PT	Portugal	5
	RO	Romania	2
	SE	Sweden	11
	SI	Slovenia	1
	SK	Slovakia	2
	UK	United Kingdom	17

	NON - EU		Plants
	KZ	Kazakhstan	1
	RS	Serbia	1
	RU	Russia	19
	TR	Turkey	10
	UA	Ukraine	1
	UZ	Uzbekistan	1

	ACEA MEMBERS	Countries	Plants
	Total	22	210
	EU	16	177

SOURCE: ACEA – JULY 2012

Motor Vehicle Production in the EU by country | **2011**

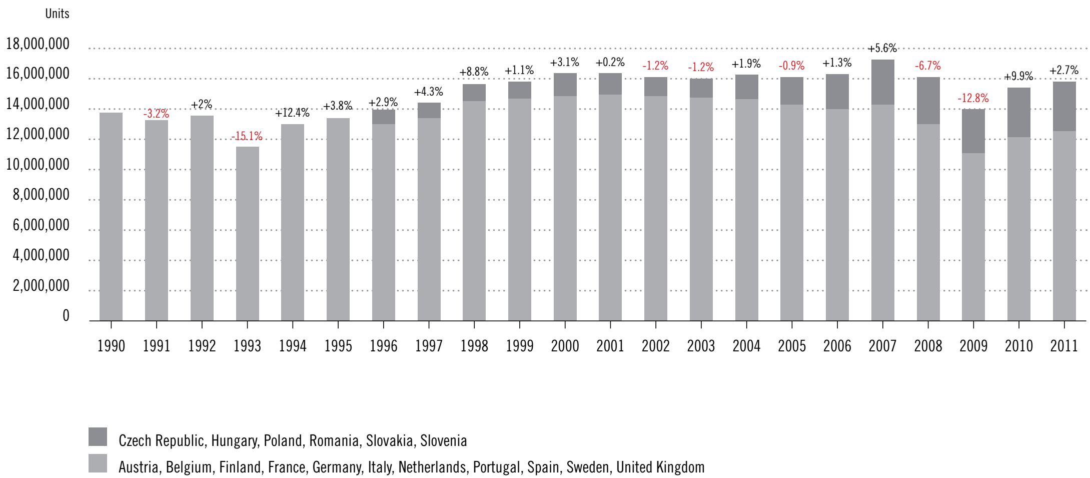
				TOTAL
AUSTRIA	130,343		22,162	152,505
BELGIUM	562,386			562,386
CZECH REPUBLIC	1,191,968	3,013	4,853	1,199,834
FINLAND	2,540			2,540
FRANCE	1,931,030	311,898	51,961	2,294,889
GERMANY	5,871,918	275,035	164,150	6,311,103
HUNGARY	200,000		2,800	202,800
ITALY	485,606	270,342	34,400	790,348
NETHERLANDS	40,772		32,379	73,151
POLAND	740,000	85,225	11,907	837,132
PORTUGAL	141,779	46,385	4,078	192,242
ROMANIA	310,243	24,924	65	335,232
SLOVAKIA	639,763			639,763
SLOVENIA	168,955	5,164		174,119
SPAIN	1,819,453	480,316	53,913	2,353,682
SWEDEN	188,969			188,969
UNITED KINGDOM	1,343,810	103,014	17,175	1,463,999
EUROPEAN UNION *	**15,701,685**	**1,600,542**	**395,770**	**17,697,997**

* Double countings are deducted from the totals

SOURCE: ACEA - 2012 (NATIONAL AUTOMOBILE ASSOCIATIONS)

Passenger Car Production Trend in the EU

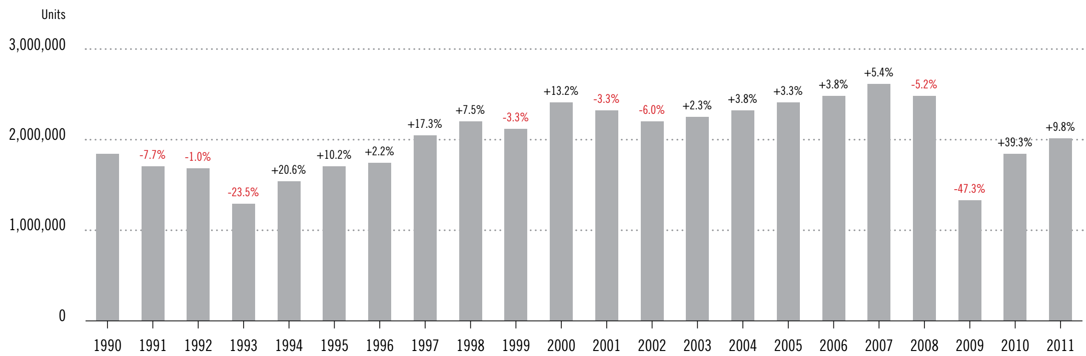
Passenger Car Production in the EU | **1990-2011**



SOURCE: ACEA – 2012

Commercial Vehicle Production Trend in the EU

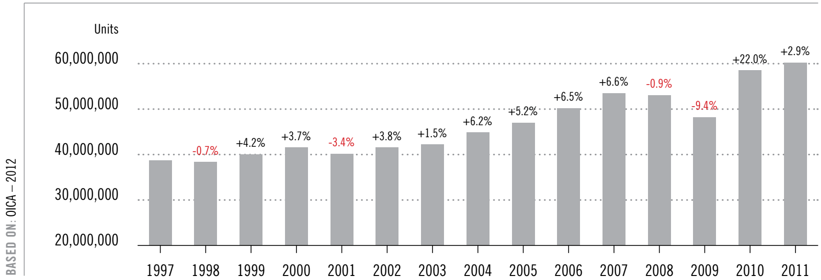
Commercial Vehicle Production in the EU | **1990-2011**



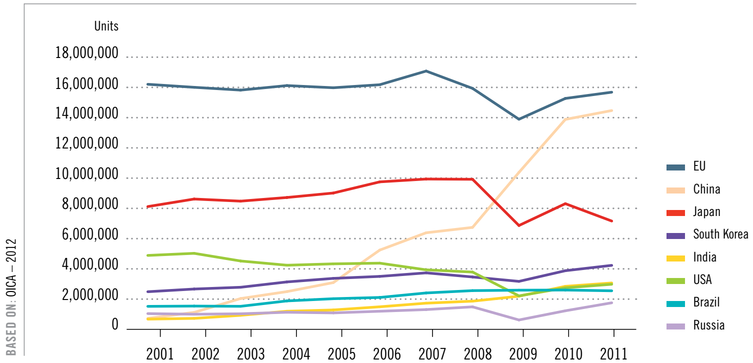
SOURCE: ACEA - 2012

Passenger Car Production in the World

World Passenger Car Production | **1997-2011**



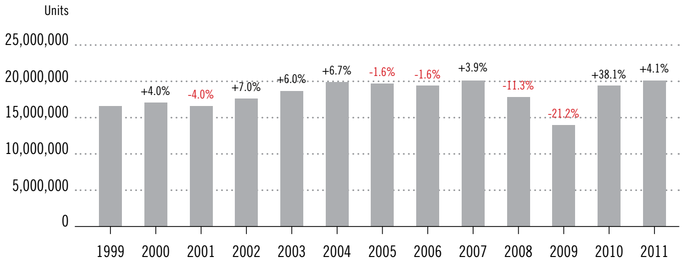
World Passenger Car Production Trend | **2001-2011**



2

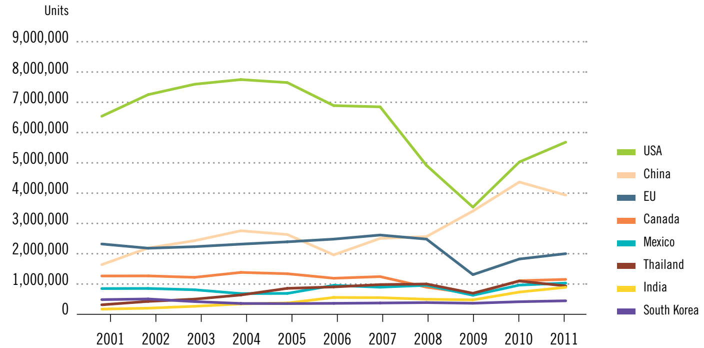
Commercial Vehicle Production in the World

World Commercial Vehicle Production | **1999-2011**



BASED ON: OICA – 2012

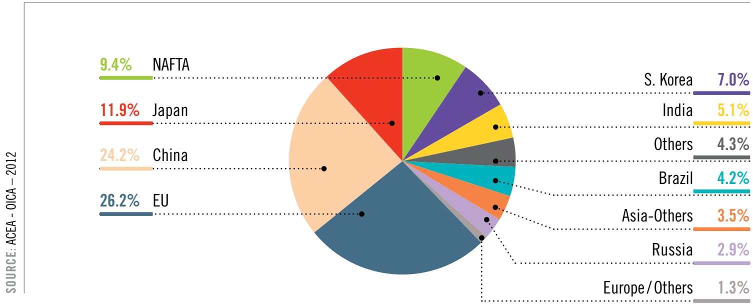
World Commercial Vehicle Production Trend | **2001-2011**



BASED ON: OICA – 2012

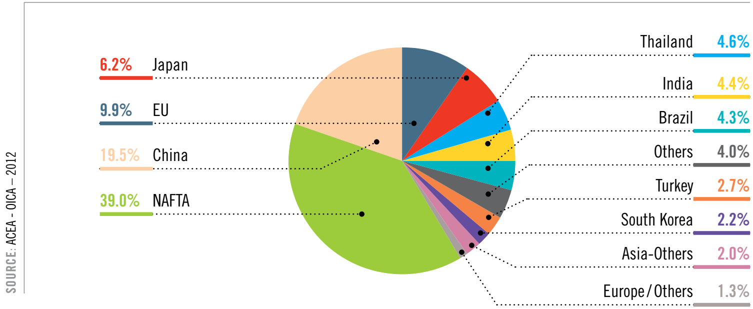
26% of passenger cars are produced in the EU

World **Passenger Car** Production (% share) | 2011



Asia - others: Australia, Indonesia, Malaysia, Taiwan, Thailand
Europe - others: Serbia, Turkey, Ukraine
Others: Argentina, Egypt, Iran, South Africa, Uzbekistan

World **Commercial Vehicle** Production (% share) | 2011



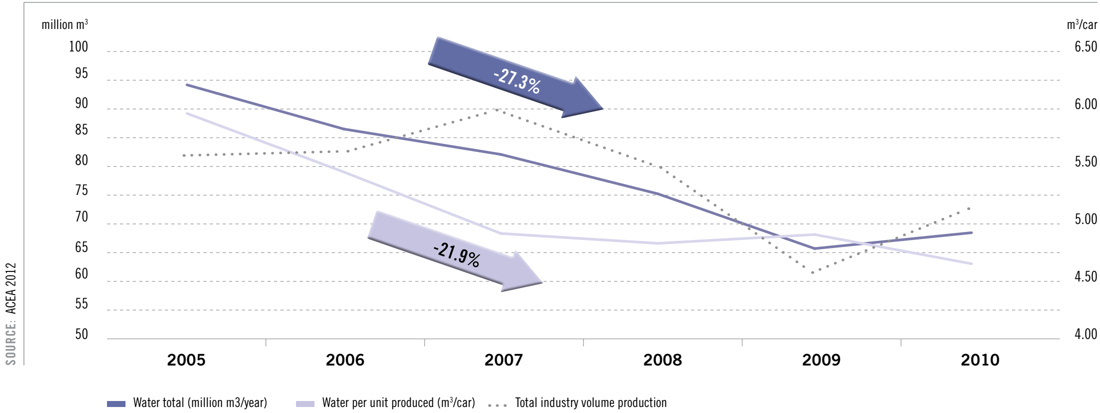
Asia - others: Australia, Indonesia, Malaysia, Taiwan
Europe - others: Russia, Serbia, Ukraine
Others: Argentina, Egypt, Iran, South Africa, Uzbekistan

Resource-Efficient Production

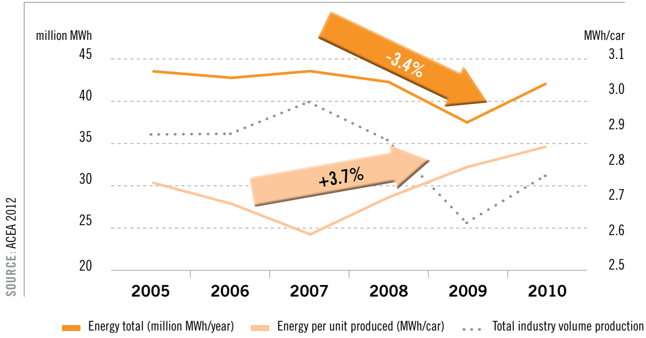
European automobile manufacturers have significantly reduced the environmental impact of vehicle production in recent years

Long-term strategies to reduce **water consumption** have made it possible to reduce the water use per car produced by almost 22% from 2005 to 2010. This includes the increased application of re-circulation technologies for the reuse of water.

Water Used

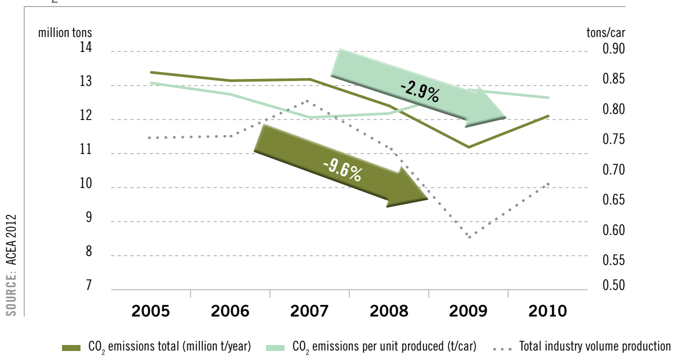


Energy Consumption



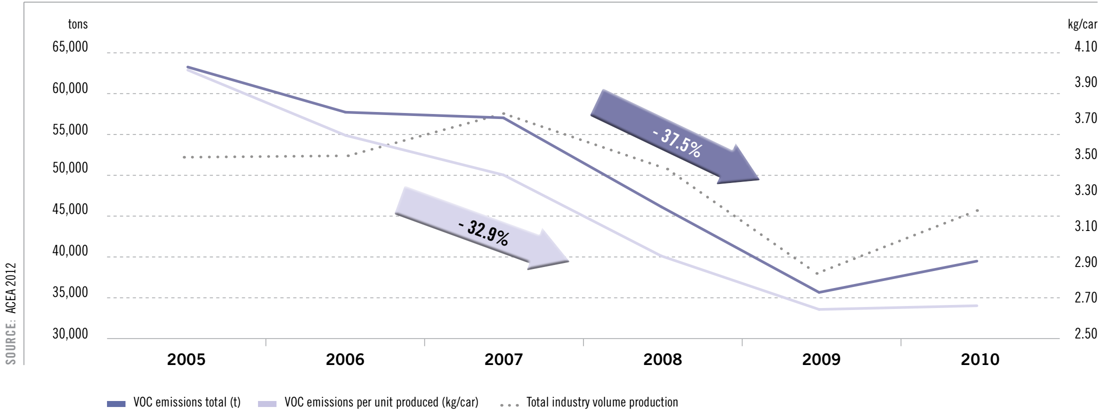
As cars are equipped with more and more features to make them safer, more comfortable and more environmentally-friendly, the complexity of production increases as well, which affects energy demand. However, manufacturers constantly work on improving **energy-efficiency**. As a result, total energy consumption over the last years, from 2005 to 2010, decreased by 3.4%. In the period 2005-2010, a 3.7% increase in energy consumption per unit produced was observed due to the drop in new car production (-6.9%), as the manufacturing process implies a baseline independent of the volumes produced.

CO_2 Emissions



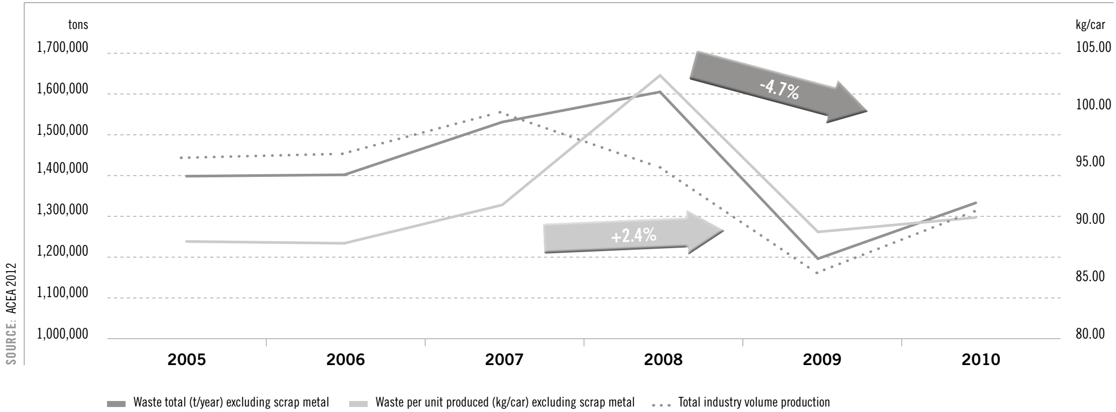
Nevertheless, the **CO2 emissions** per vehicle produced in the same period dropped by 2.9%, while the overall figure went down by 9.6%, reflecting the industry's efforts to reduce CO_2 emissions.

VOC Emissions



Volatile Organic Compounds (VOC) are organic solvents mainly emitted from paintshops. The graph shows the VOC emissions per car produced and the absolute emissions of all passenger car manufacturers altogether. With new technologies such as water-based paints that replace solvent-based paints, manufacturers have been able to reduce emissions by 32.9% per vehicle over six years.

Waste (excluding scrap metal)



The total amount of waste generated by the manufacturing of vehicles went down 4.7% over six years. Fluctuation both in absolute waste and waste per car, especially in 2008, can be explained by the occurrence of once-off events such as the formation of demolition waste.

Registrations

2012

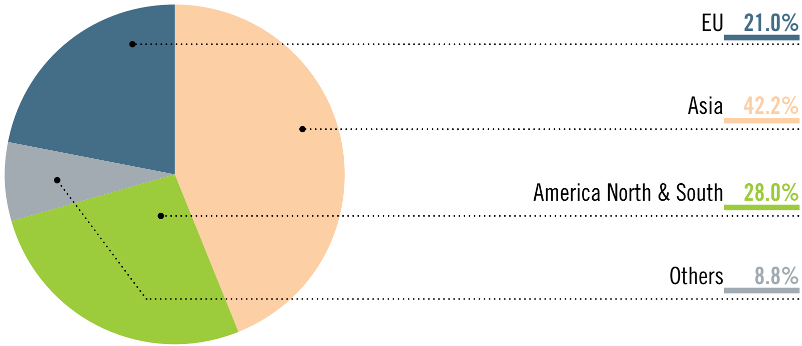
THE AUTOMOBILE INDUSTRY POCKET GUIDE

EUROPEAN
AUTOMOBILE
MANUFACTURERS
ASSOCIATION

ACEA

The EU represents a market of over 15m new vehicles per year

Motor Vehicles Worldwide | **2011**



SOURCE: ACEA – 2012

In 2011, the EU accounted for 21% of new vehicle sales in the world

Motor Vehicle Registrations in the EU by Country | 2011

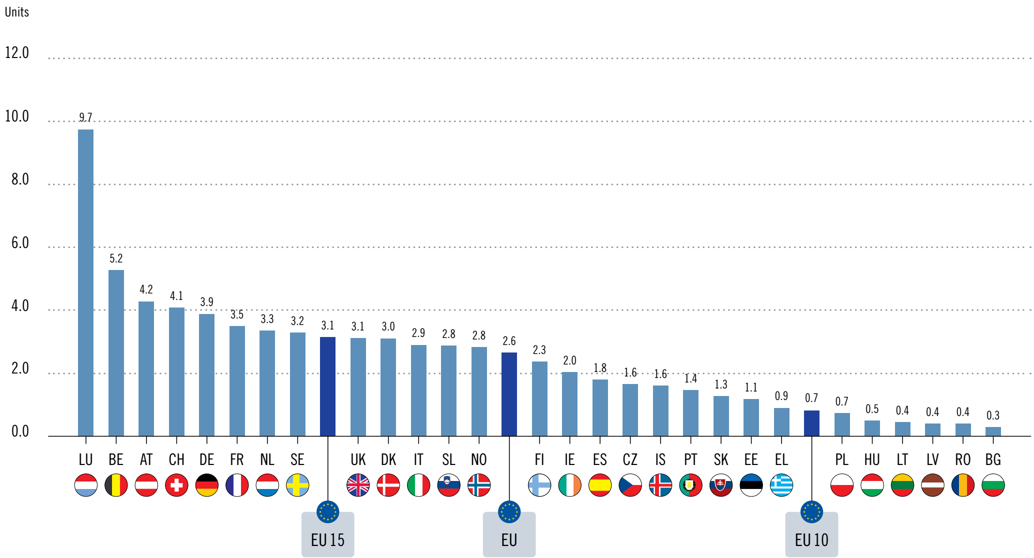
					TOTAL
AT	356,145	32,531	7,377	602	396,655
BE	572,211	61,428	9,883	716	644,238
BG	19,136	2,927	n.a.	n.a.	22,063
CZ	173,282	13,269	7,962	837	195,350
DK	168,707	24,327	3,675	475	197,184
EE	15,350	1,968	764	55	18,137
FI	126,123	14,491	3,413	398	144,425
FR	2,204,229	426,655	49,365	6,803	2,687,052
DE	3,173,634	233,422	96,358	5,042	3,508,456
EL	97,682	6,357	536	83	104,658
HU	45,097	11,433	4,314	152	60,996
IE	89,896	11,346	1,141	60	102,443
IT	1,748,143	170,634	20,747	5,908	1,945,432
LV	8,849	1,456	1,417	189	11,911
LT	13,223	1,824	2,762	104	17,913

					TOTAL
LU	49,881	3,423	1,255	197	54,756
NL	556,123	58,654	12,651	640	628,068
PL	277,430	42,692	17,106	1,538	338,766
PT	153,433	34,881	2,665	330	191,309
RO	81,719	9,458	3,730	125	95,032
SK	68,203	5,735	3,664	302	77,904
SI	58,417	6,482	1,382	123	66,404
ES	808,059	104,372	16,302	2,679	931,412
SE	304,984	46,337	6,128	1,617	359,066
UK	1,941,253	260,153	40,850	5,485	2,247,741
EU[1]	**13,111,209**	**1,586,255**	**315,447**	**34,460**	**15,047,371**
IS	5,038	336	63	31	5,468
NO	138,345	35,512	5,111	1,345	180,313
CH	318,958	28,875	4,265	669	352,767
EFTA	**462,341**	**64,723**	**9,439**	**2,045**	**538,548**
EU+EFTA	**13,573,550**	**1,650,978**	**324,886**	**36,505**	**15,585,919**

[1] Data for Cyprus and Malta not available

SOURCE: ACEA - 2012 (NATIONAL AUTOMOBILE ASSOCIATIONS)

New Car Registrations per 100 inhabitants | **2011**



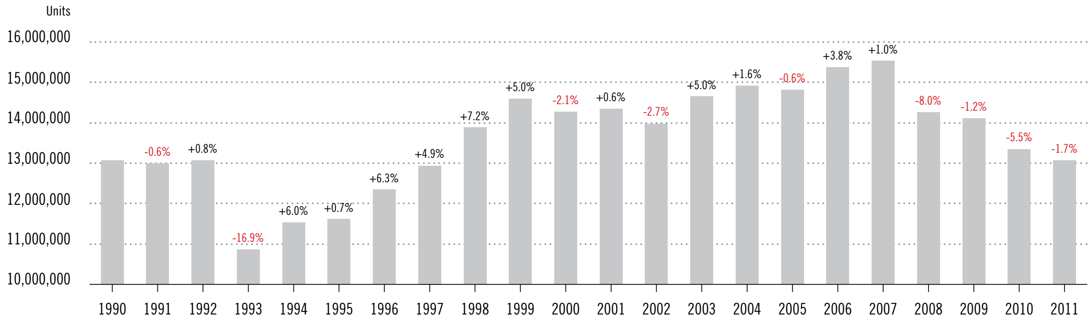
EU = EU27, data for Cyprus and Malta n.a.
EU15 = AT, BE, DK, FI, FR, DE, EL, IE, IT, LU, NL, PT, ES, SE, UK
EU10 = BG, CZ, EE, HU, LV, LT, PL, RO, SK, SI

SOURCE: ACEA – 2012

3

Trend in New EU Car Registrations

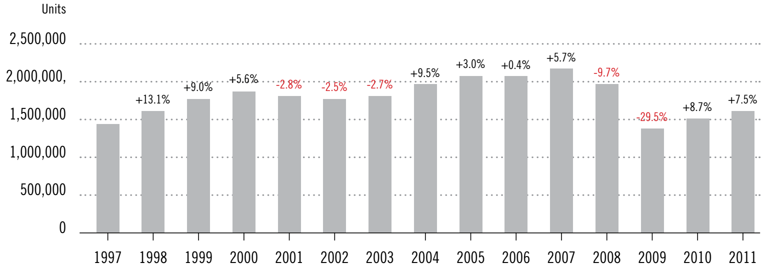
New Car Registrations in the EU | **1990-2011**



SOURCE: ACEA – 2012

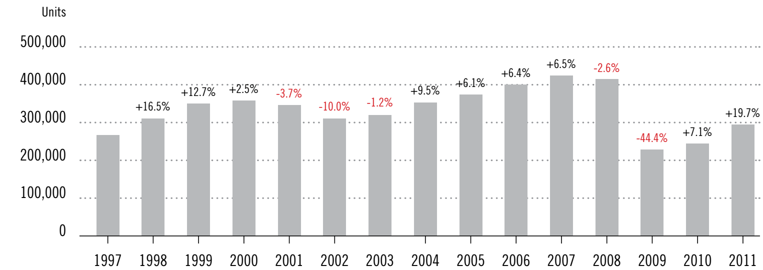
Trend in New EU Commercial Vehicle Registrations

New **Light Commercial Vehicle** Registrations in the EU | **1997-2011**



SOURCE: ACEA 2012, BASED ON AAA DATA

New **Medium & Heavy Commercial Vehicle** Registrations in the EU | **1997-2011**

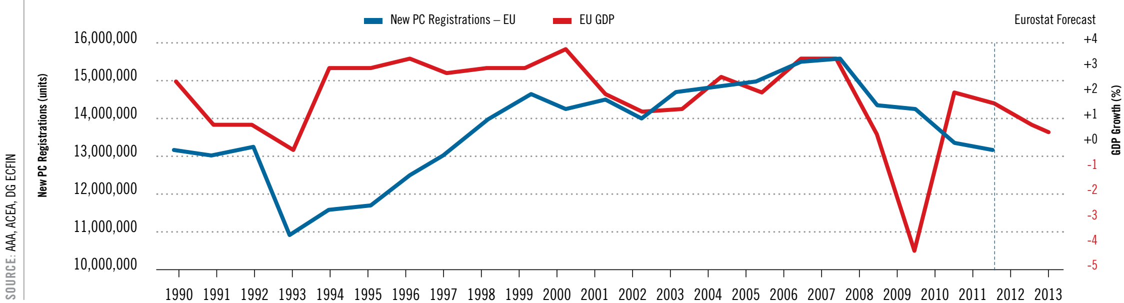


SOURCE: ACEA 2012, BASED ON AAA DATA

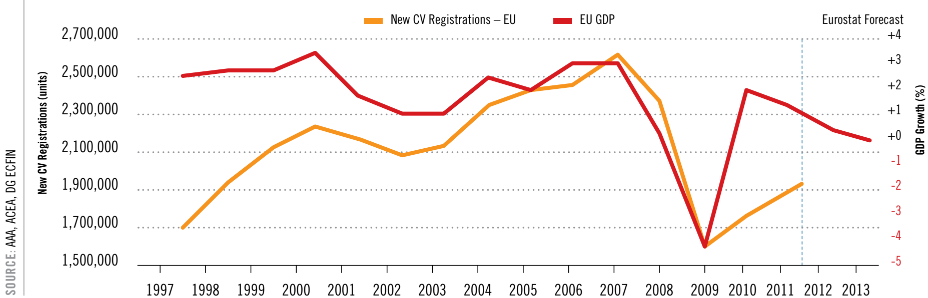
3

Vehicle sales develop in relation to economic growth

New **Passenger Car** Registrations in the EU and GDP | **1990-2011**

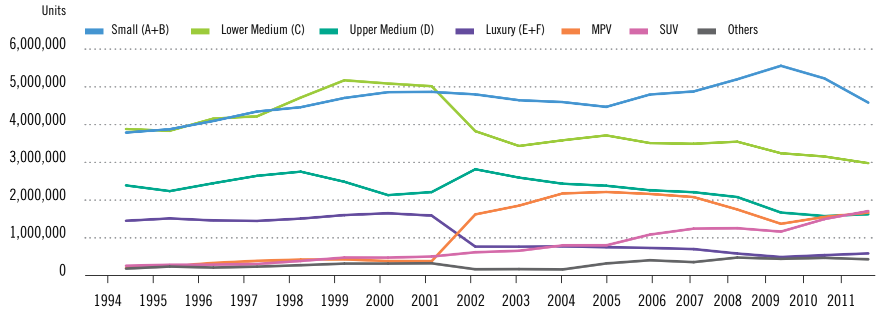


New **Commercial Vehicle** Registrations in the EU and GDP | **1997-2011**



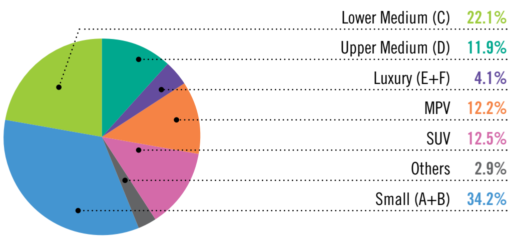
A closer look at consumer demand

New Cars sold in Europe* by Segment | 1994-2011



SOURCE: IHS GLOBAL INSIGHT

New Cars sold in Europe* by Segment | 2011



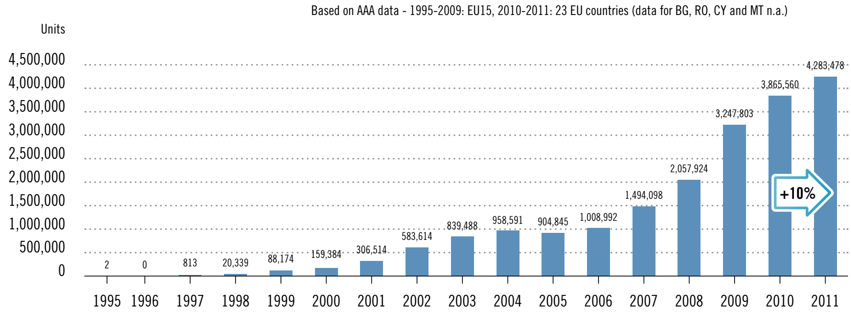
SOURCE: IHS GLOBAL INSIGHT

* Europe = EU27 withouth Luxembourg, + Norway and Switzerland

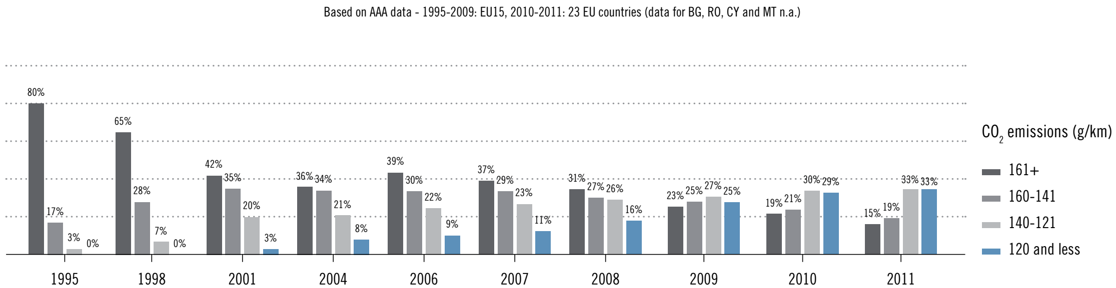
More information on trends in new car characteristics at http://www.acea.be/index.php/news/news_detail/trends_in_new_car_characteristics/

The drive towards fuel efficiency

Demand for Cars Emitting ≤ 120 gCO_2/km | **1995-2011**

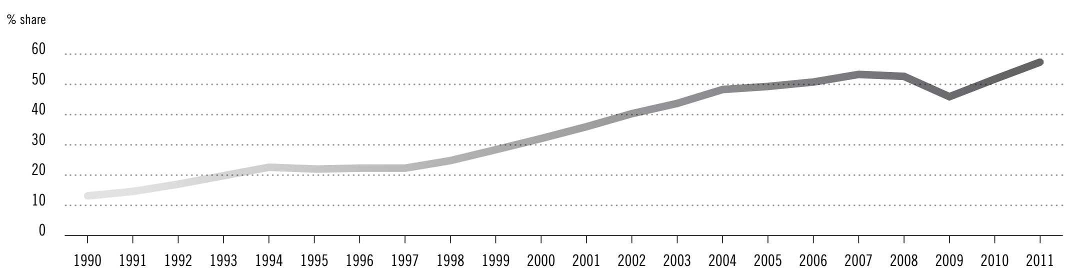


New Cars in the EU by CO_2 Emissions | **1995-2011**



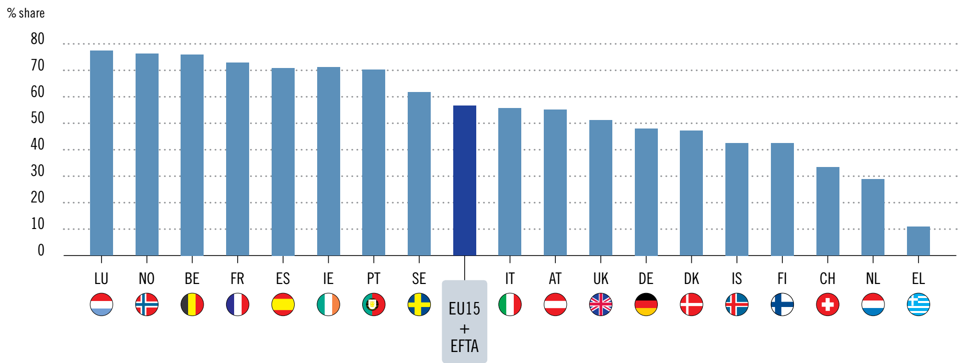
Most new cars have a diesel engine

Diesel Penetration in the EU15+EFTA (% of new cars registered) | **1990-2011**



SOURCE: BASED ON AAA (FIGURES FOR THE EU15+EFTA)

Diesel Penetration in the EU15+EFTA by Country (% of new cars registered) | **2011**



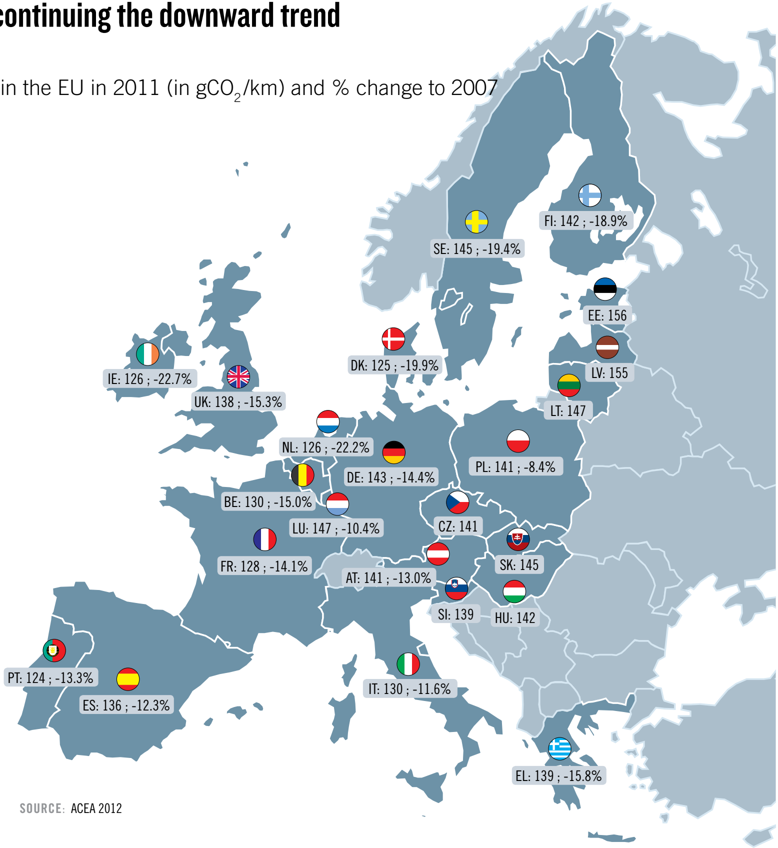
SOURCE: BASED ON AAA (FIGURES FOR THE EU15+EFTA)

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

CO_2 emissions of new cars : continuing the downward trend

Average CO_2 emissions of new cars in the EU in 2011 (in gCO_2/km) and % change to 2007

	Average CO_2 of new cars in 2011	% change 2011/2007
PT	124	-13.3%
DK	125	-19.9%
IE	126	-22.7%
NL	126	-22.2%
FR	128	-14.1%
BE	130	-15.0%
IT	130	-11.6%
ES	136	-12.3%
UK	138	-15.3%
EL	139	-15.8%
SI	139	
AT	141	-13.0%
PL	141	-8.4%
CZ	141	
FI	142	-18.9%
HU	142	
DE	143	-14.4%
SK	145	
SE	145	-19.4%
LT	147	
LU	147	-10.4%
LV	155	
EE	156	

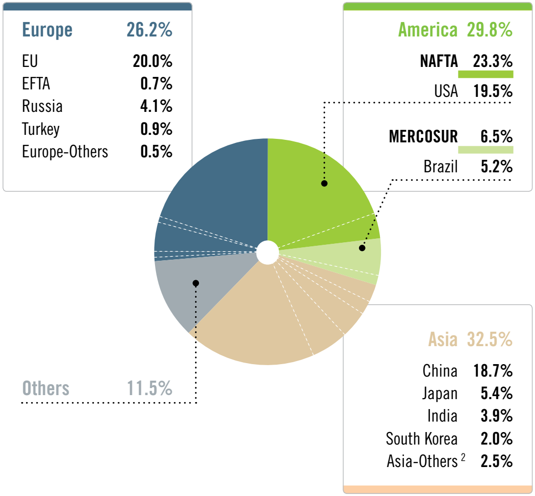


SOURCE: ACEA 2012

New Passenger Car Registrations in the World

Market Shares | 2011

PASSENGER CARS in 1,000 units	2011	% share	2010	% change 11/10
EUROPE	**17,151**	**26.2%**	**16,478**	**4.1%**
EU	13,111	20.0%	13,343	-1.7%
EFTA	462	0.7%	425	8.8%
Russia	2,654	4.1%	1,913	38.7%
Turkey	594	0.9%	510	16.4%
Europe-Others	330	0.5%	287	15.0%
AMERICA [1]	**19,492**	**29.8%**	**17,926**	**8.7%**
NAFTA	15,221	23.3%	13,928	9.3%
of which USA	12,734	19.5%	11,555	10.2%
MERCOSUR	4,271	6.5%	3,999	6.8%
of which Brazil	3,426	5.2%	3,329	2.9%
ASIA	**21,232**	**32.5%**	**20,734**	**2.4%**
China	12,214	18.7%	11,266	8.4%
Japan	3,525	5.4%	4,212	-16.3%
India	2,523	3.9%	2,377	6.1%
South Korea	1,316	2.0%	1,308	0.6%
Asia-Others [2]	1,654	2.5%	1,571	5.3%
OTHERS	**7,541**	**11.5%**	**6,534**	**15.4%**
TOTAL WORLD	**65,416**	**100.0%**	**61,673**	**6.1%**



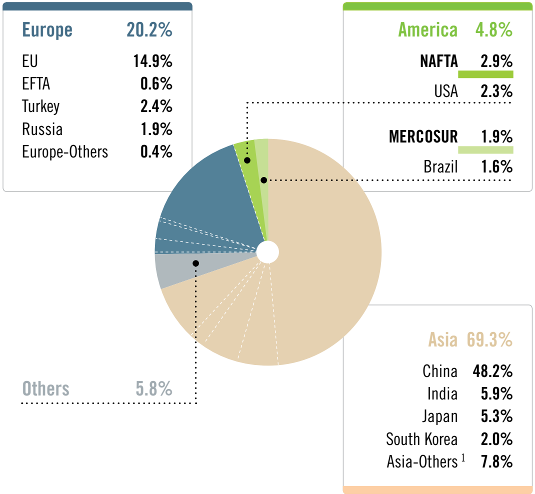
1. Including Light Commercial Vehicles
2. Indonesia, Malaysia, Philippines, Taiwan, Thailand

SOURCE: VDA, ACEA - 2012

New Commercial Vehicle Registrations in the World

Market Shares | 2011

COMMERCIAL VEHICLES in 1,000 units	2011	% share	2010	% change 11/10
EUROPE	**2,631**	**20.2%**	**2,357**	**11.6%**
EU	1,944	14.9%	1,775	9.5%
EFTA	76	0.6%	64	19.9%
Russia	248	1.9%	197	25.7%
Turkey	317	2.4%	283	12.0%
Europe-Others	46	0.4%	38	21.6%
AMERICA	**621**	**4.8%**	**488**	**27.2%**
NAFTA	376	2.9%	273	37.4%
of which USA	306	2.3%	218	40.6%
MERCOSUR	245	1.9%	215	14.2%
of which Brazil	208	1.6%	186	11.5%
ASIA	**9,037**	**69.3%**	**9,446**	**-4.3%**
China	6,291	48.2%	6,796	-7.4%
Japan	685	5.3%	744	-7.9%
India	775	5.9%	659	17.5%
South Korea	263	2.0%	248	6.3%
Asia-Others [1]	1,022	7.8%	999	2.3%
OTHERS	**752**	**5.8%**	**709**	**6.1%**
TOTAL WORLD	**13,041**	**100.0%**	**13,000**	**0.3%**



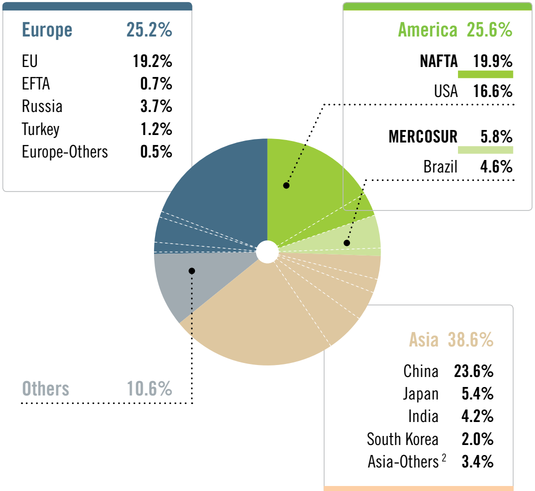
1. Indonesia, Malaysia, Philippines, Taiwan, Thailand

SOURCE: VDA, ACEA - 2012

New Motor Vehicle Registrations in the World

Market Shares | **2011**

MOTOR VEHICULES in 1,000 units	2011	% share	2010	% change 11/10
EUROPE	**19,782**	**25.2%**	**18,835**	**5.0%**
EU	15,055	19.2%	15,118	-0.4%
EFTA	539	0.7%	489	10.2%
Russia	2,902	3.7%	2,110	37.5%
Turkey	911	1.2%	793	14.8%
Europe-Others	376	0.5%	325	15.7%
AMERICA	**20.113**	**25.6%**	**18,415**	**9.2%**
NAFTA	15,597	19.9%	14,201	9.8%
of which USA	13,041	16,6%	11,772	10.8%
MERCOSUR	4,517	5.8%	4,213	7.2%
of which Brazil	3,633	4.6%	3,515	3.4%
ASIA	**30,269**	**38.6%**	**30,180**	**0.3%**
China	18,505	23.6%	18,062	2.5%
Japan	4,210	5.4%	4,956	-15.1%
India	3,298	4.2%	3,037	8.6%
South Korea	1,580	2.0%	1,556	1.5%
Asia-Others [1]	2,676	3.4%	2,570	4.1%
OTHERS	**8,293**	**10.6%**	**7,243**	**14.5%**
TOTAL WORLD	**78,457**	**100.0%**	**74,673**	**5.1%**



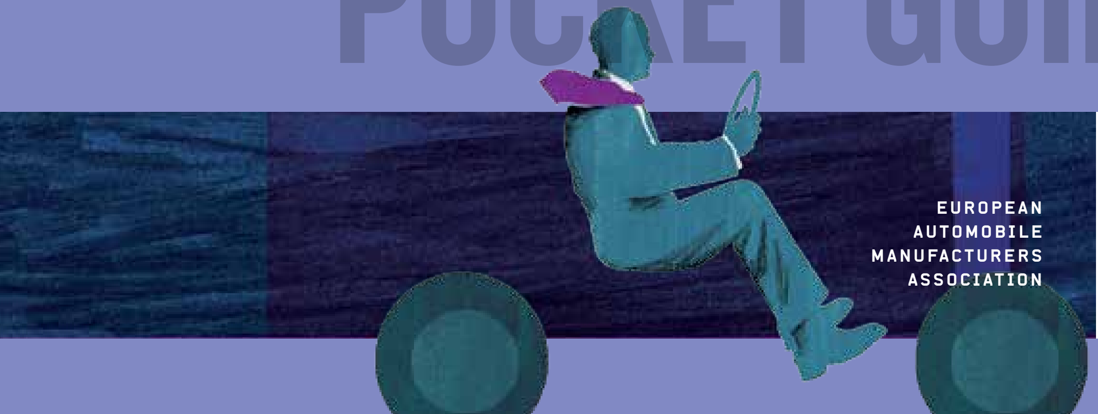
1. Indonesia, Malaysia, Philippines, Taiwan, Thailand

SOURCE: VDA, ACEA - 2012

Vehicles in Use

2012

THE AUTOMOBILE INDUSTRY POCKET GUIDE

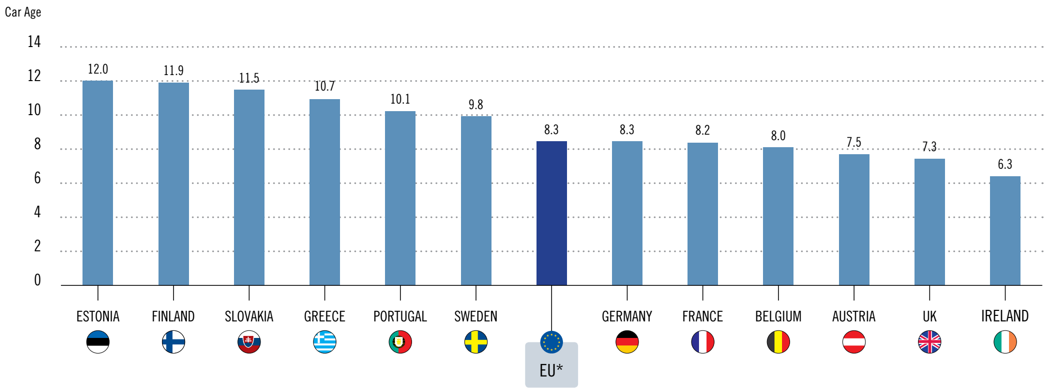


EUROPEAN AUTOMOBILE MANUFACTURERS ASSOCIATION

ACEA

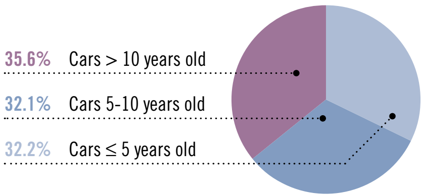
Cars in the EU are on average 8.3 years old

Average Car Age by country | 2010



SOURCE: ANFAC, ACEA - 2012

Car Fleet* by age | 2010

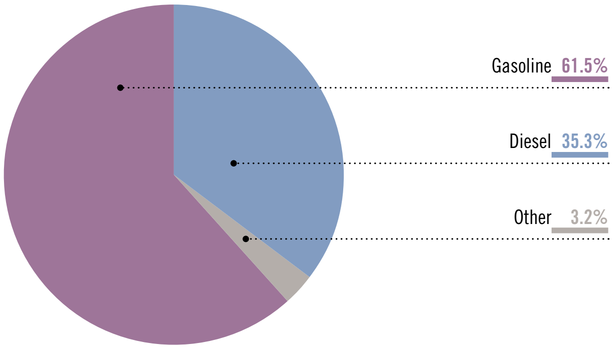


SOURCE: ANFAC, ACEA - 2012

* for available countries: *Austria, Belgium, Estonia, Finland, France, Germany, Greece, Ireland, Portugal, Slovakia, Sweden, UK.*

EU car fleet composition

EU Car Fleet by Fuel Type | **2010**

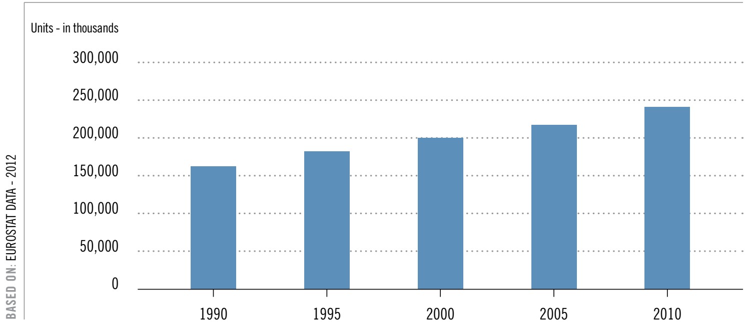


SOURCE: ANFAC, ACEA - 2012

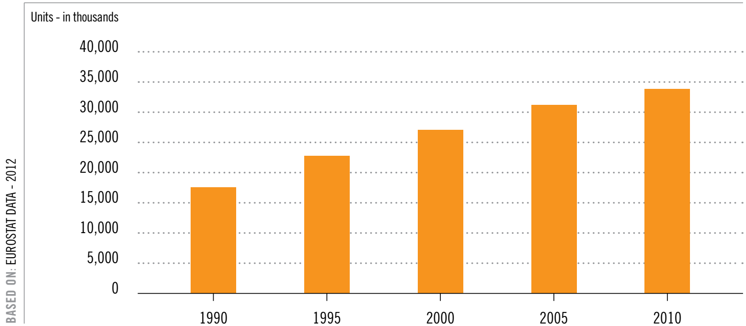
* for available countries: Austria, Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Italy, Latvia, Lithuania, Netherlands, Poland, Romania, Spain, Sweden, UK

EU vehicle fleet development

EU Passenger Car Fleet | 1990 – 2010

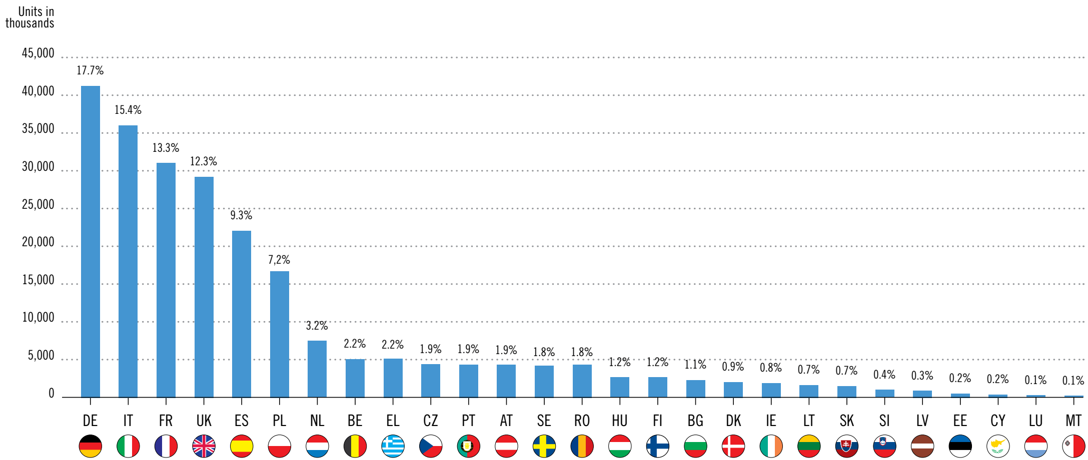


EU Commercial Vehicle Fleet | 1990 – 2010



Vehicle spread in the EU

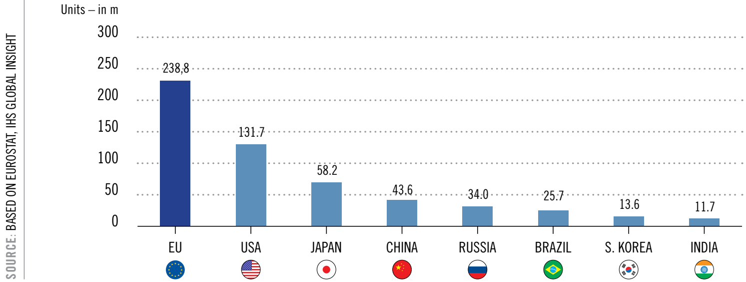
Car Fleet by country (in units and % share) | **2010**



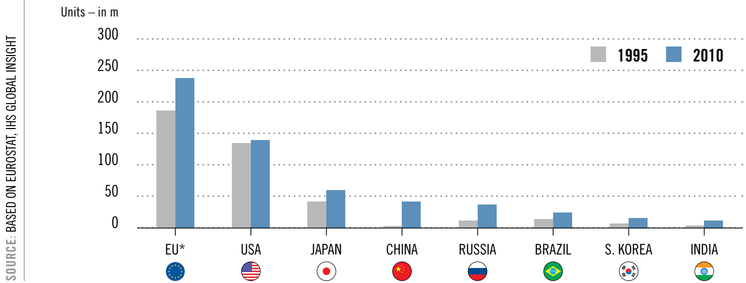
BASED ON: EUROSTAT DATA - 2012

International comparison

Car Fleet (in million) | 2010



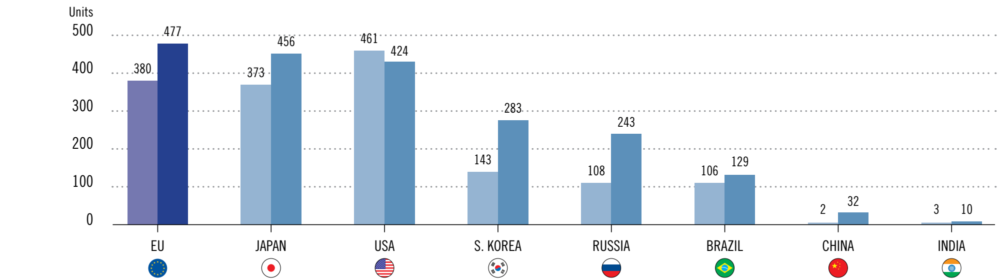
Car Fleet Growth | 1995-2010



* 27 countries included over the whole period

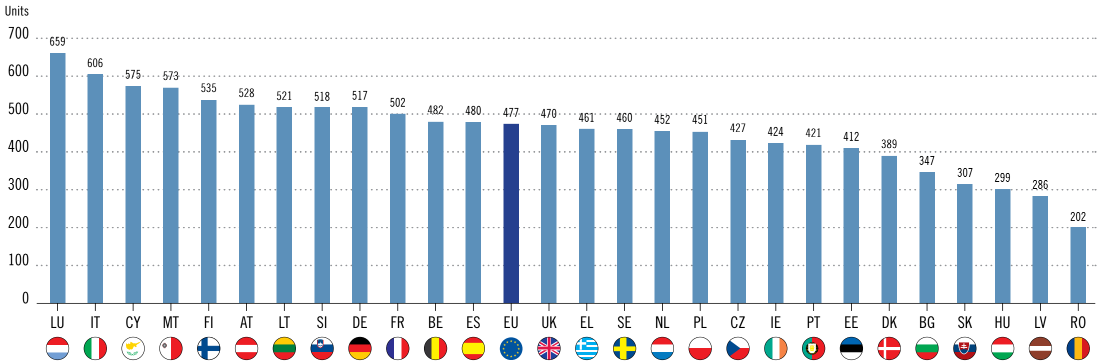
Trends in motorisation

Car Density in the World (cars per 1,000 inhabitants) | **1995-2010**



SOURCE: BASED ON EUROSTAT, IHS GLOBAL INSIGHT

Car Density in the EU (cars per 1,000 inhabitants) | **2010**



SOURCE: BASED ON EUROSTAT DATA 2012

Trade

2012

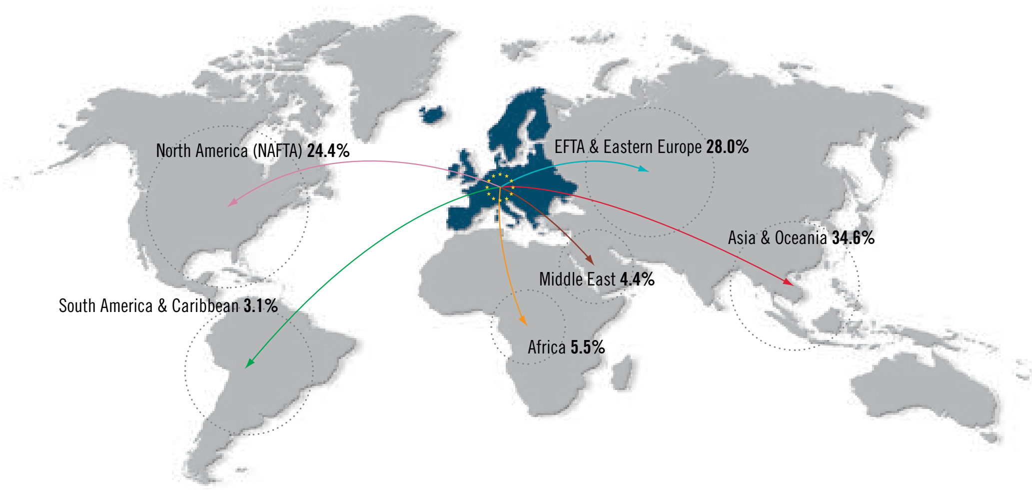
THE AUTOMOBILE INDUSTRY POCKET GUIDE

EUROPEAN
AUTOMOBILE
MANUFACTURERS
ASSOCIATION

ACEA

The EU automotive industry is a formidable exporter

EU Exports of Passenger Cars (in value)



SOURCE: BASED ON EUROSTAT DATA - 2011

EU Motor Vehicle Trade by type (in €m)

TRADE IN VALUE (€m)	YEAR 2010 IMPORTS	YEAR 2010 EXPORTS	YEAR 2010 TRADE BALANCE	YEAR 2011 IMPORTS	YEAR 2011 EXPORTS	YEAR 2011 TRADE BALANCE	% CHG 11/10 IMPORTS	% CHG 11/10 EXPORTS	% CHG 11/10 TRADE BALANCE
Passenger Cars	22,270	76,358	54,088	24,201	93,819	69,618	8.7%	22.9%	28.7%
Commercial Vehicles (up to 5t)	3,462	3,212	-250	3,904	3,777	-127	12.8%	17.6%	-49.2%
Commercial Vehicles (over 5t) + Buses & Coaches	565	5,308	4,743	602	6,364	5,762	6.5%	19.9%	21.5%
TOTAL	**26,297**	**84,878**	**58,581**	**28,707**	**103,960**	**75,253**	**9.2%**	**22.5%**	**28.5%**

SOURCE: EUROSTAT

EU Motor Vehicle Trade by type (in units)

TRADE IN VOLUME (UNITS)	YEAR 2010 IMPORTS	YEAR 2010 EXPORTS	YEAR 2011 IMPORTS	YEAR 2011 EXPORTS	% CHG 11/10 IMPORTS	% CHG 11/10 EXPORTS
Passenger Cars	2,261,036	4,267,223	2,317,523	5,356,033	2.5%	25.5%
Commercial Vehicles (up to 5t)	317,318	332,288	326,089	383,184	2.8%	15.3%
Commercial Vehicles (over 5t) + Buses & Coaches	31,328	205,463	24,044	855,869	-23.3%	316.6%
TOTAL	**2,609,682**	**4,804,974**	**2,667,656**	**6,595,086**	**2.2%**	**37.3%**

SOURCE: EUROSTAT

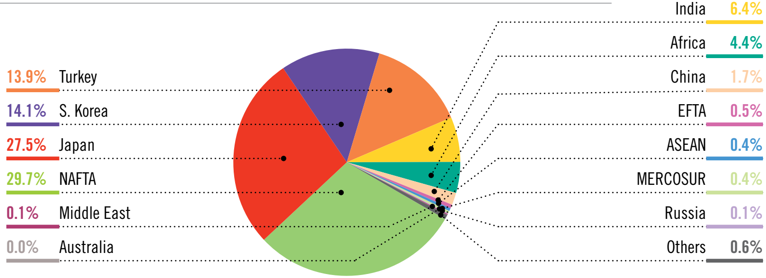
Most EU imports come from Japan

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

	2006	2007	2008	2009	2010	2011	% CHG 11/10	% SHARE IN 2011
World	**31 943**	**33 772**	**30 053**	**22 282**	**22 270**	**24 201**	**8,7%**	**100,0%**
Japan	12,225	12,031	10,818	8,377	7,519	6,652	-11.5%	27.5%
United States	5,534	6,395	6,036	2,990	3,534	4,721	33.6%	19.5%
South Korea	7,274	6,691	3,945	2,610	2,450	3,415	39.4%	14.1%
Turkey	3,393	4,206	3,676	3,194	3,398	3,370	-0.8%	13.9%
Mexico	1,334	1,992	2,405	1,499	1,644	2,309	40.4%	9.5%
India	273	335	585	1,537	1,265	1,547	22.3%	6.4%
South Africa	366	70	300	469	846	897	6.0%	3.7%
China	313	505	562	412	482	421	-12.7%	1.7%
Canada	112	108	95	49	90	159	76.7%	0.7%
Switzerland	143	193	155	125	117	106	-9.4%	0.4%

SOURCE: EUROSTAT

Passenger Cars – Origin of EU **Imports (in value) | 2011**



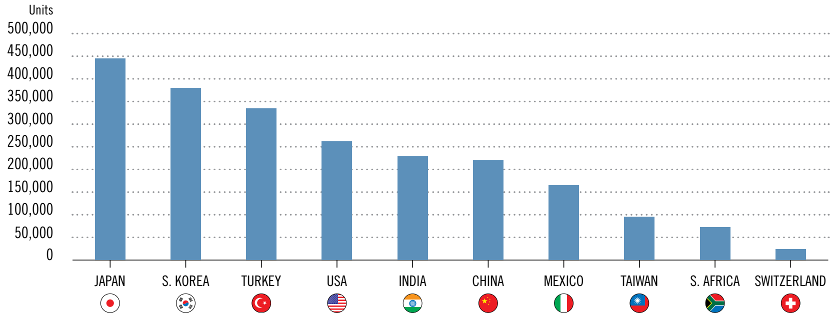
SOURCE: BASED ON EUROSTAT DATA

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

	2006	2007	2008	2009	2010	2011	% CHG 11/10	% SHARE IN 2011
World	**3,195,807**	**3,436,549**	**3,003,472**	**2,313,047**	**2,261,036**	**2,317,523**	**2.5%**	**100.0%**
Japan	962,486	965,959	867,493	689,316	598,868	447,632	-25.3%	19.3%
South Korea	717,766	651,333	446,552	351,265	294,136	383,621	30.4%	16.6%
Turkey	344,933	385,727	411,563	314,544	330,561	335,374	1.5%	14.5%
United States	354,038	460,220	371,958	162,999	196,959	263,149	33.6%	11.4%
India	49,826	119,630	99,540	265,891	223,102	230,461	3.3%	9.9%
China	399,384	391,676	303,265	182,673	218,875	221,313	1.1%	9.5%
Mexico	101,331	152,007	183,650	116,324	124,126	166,189	33.9%	7.2%
Taiwan	78,157	122,466	136,677	73,910	93,628	95,441	1.9%	4.1%
South Africa	17,963	3,913	20,520	31,395	65,328	71,397	9.3%	3.1%
Switzerland	29,480	41,282	36,462	26,519	24,138	23,211	-3.8%	1.0%

SOURCE: EUROSTAT

Origin of EU Passenger Car **Imports** | 2011



SOURCE: BASED ON EUROSTAT DATA

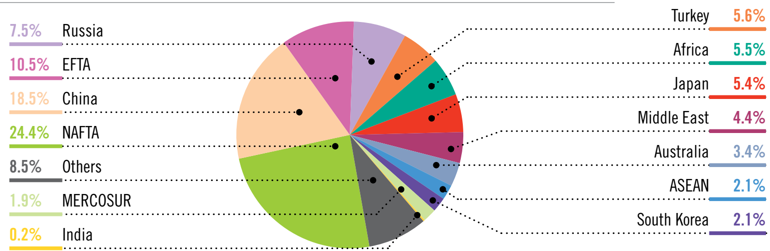
Car shipments to the USA represent 21% of EU car exports (in value)

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

	2006	2007	2008	2009	2010	2011	% CHG 11/10	% SHARE IN 2011
World	**68,068**	**71,025**	**69,562**	**48,220**	**76,358**	**93,819**	**22.9%**	**100.0%**
United States	27,074	24,754	20,546	12,812	19,156	19,543	2.0%	20.8%
China	2,252	3,345	4,610	5,477	12,181	17,348	42.4%	18.5%
Russia	4,319	6,659	8,786	2,577	4,098	7,050	72.1%	7.5%
Switzerland	4,004	4,324	4,363	3,943	5,277	6,653	26.1%	7.1%
Turkey	2,908	2,835	2,808	2,067	4,260	5,215	22.4%	5.6%
Japan	4,224	4,121	3,254	2,716	3,843	5,094	32.5%	5.4%
Australia	1,831	2,101	2,187	1,614	2,767	3,180	14.9%	3.4%
Norway	2,275	2,703	2,192	1,867	2,733	3,056	11.8%	3.3%
Canada	2,104	2,094	2,085	1,818	2,442	2,512	2.9%	2.7%
South Korea	1,018	975	912	806	1,681	1,955	16.3%	2.1%

SOURCE: EUROSTAT

Passenger Cars – Destination of EU **Exports** (in value) | 2011



SOURCE: BASED ON EUROSTAT DATA

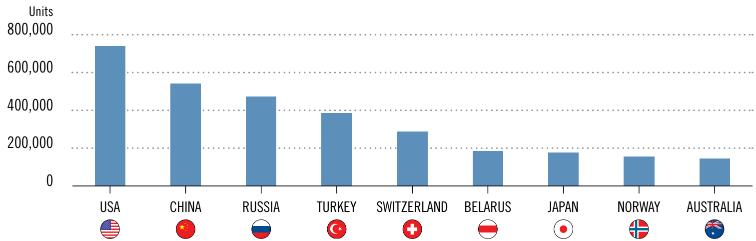
About 14% of EU car exports set sail to the USA

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

	2006	2007	2008	2009	2010	2011	% CHG 11/10	% SHARE IN 2011
World	**4,371,958**	**5,069,862**	**4,854,621**	**3,461,639**	**4,267,223**	**5,356,033**	**25.5%**	**100.0%**
United States	995,548	988,449	875,953	548,852	709,835	742,466	4.6%	13.9%
China	60,393	100,480	136,567	173,042	345,636	544,966	57.7%	10.2%
Russia	347,849	533,780	675,312	179,000	294,033	475,829	61.8%	8.9%
Turkey	247,982	225,785	223,463	170,698	339,755	386,378	13.7%	7.2%
Switzerland	213,290	244,539	234,076	204,621	257,439	293,863	14.1%	5.5%
Belarus	85,167	100,963	119,212	111,739	153,994	185,874	20.7%	3.5%
Japan	169,333	213,709	161,750	115,005	150,912	175,924	16.6%	3.3%
Norway	127,625	153,320	124,422	112,240	150,542	157,092	4.4%	2.9%
Australia	100,001	111,435	110,082	84,754	125,216	144,686	15.5%	2.7%

SOURCE: EUROSTAT

Destination of EU Passenger Car **Exports** | **2011**



SOURCE: BASED ON EUROSTAT DATA

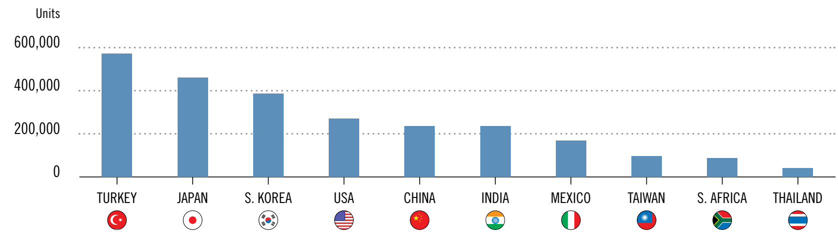
A closer look at imports of all vehicle categories

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

	2006	2007	2008	2009	2010	2011	% CHG 11/10	% SHARE IN 2011
World	**3,583,932**	**3,842,312**	**3,466,760**	**2,623,102**	**2,609,682**	**2,667,656**	**2.2%**	**100.0%**
Turkey	561,924	621,375	716,988	497,829	568,909	571,799	0.5%	21.4%
Japan	992,202	988,503	894,308	704,493	613,126	457,962	-25.3%	17.2%
South Korea	725,365	655,421	452,356	353,546	296,093	385,206	30.1%	14.4%
United States	361,846	469,861	386,405	168,552	203,498	269,798	32.6%	10.1%
China	420,090	404,008	317,718	237,125	228,331	232,646	1.9%	8.7%
India	51,784	121,276	102,124	267,297	224,556	231,607	3.1%	8.7%
Mexico	101,378	152,046	183,689	116,334	124,141	166,205	33.9%	6.2%
Taiwan	78,961	123,215	137,388	74,756	94,450	95,670	1.3%	3.6%
South Africa	29,524	25,092	35,321	38,863	74,203	85,427	15.1%	3.2%
Thailand	75,014	82,883	62,679	35,824	44,393	40,004	-9.9%	1.5%

SOURCE: EUROSTAT

Origin of EU Motor Vehicle **Imports** (in units) | 2011



SOURCE: BASED ON EUROSTAT DATA

5

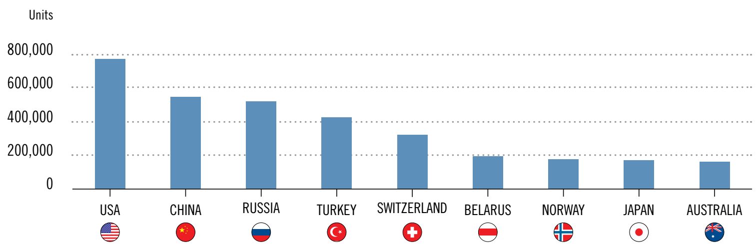
A closer look at exports of all vehicle categories

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

	2006	2007	2008	2009	2010	2011	% CHG 10/11	% SHARE IN 2011
World	5,102,352	5,646,409	5,415,766	3,826,636	4,804,974	6,595,086	37.3%	100.0%
United States	1,001,574	997,626	882,136	552,382	716,204	772,175	7.8%	11.7%
China	61,774	103,658	138,151	175,066	349,792	553,197	58.2%	8.4%
Russia	390,234	609,765	736,069	194,342	327,735	521,772	59.2%	7.9%
Turkey	375,732	258,588	256,387	188,892	384,089	432,788	12.7%	6.6%
Switzerland	238,055	269,096	260,189	226,125	283,432	323,910	14.3%	4.9%
Belarus	92,276	109,412	128,893	119,308	158,486	191,166	20.6%	2.9%
Norway	149,838	177,929	146,138	124,723	170,719	181,631	6.4%	2.8%
Japan	169,690	214,001	161,838	115,085	151,041	178,657	18.3%	2.7%
Australia	116,869	140,202	136,959	96,973	143,222	160,088	11.8%	2.4%

SOURCE: EUROSTAT

Destination of EU Motor Vehicle **Exports** (in units) | 2011



SOURCE: BASED ON EUROSTAT DATA

Taxation

2012 THE AUTOMOBILE INDUSTRY POCKET GUIDE

EUROPEAN
AUTOMOBILE
MANUFACTURERS
ASSOCIATION

ACEA

CO_2 taxation

CO_2 taxation is now 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. Finland and Greece have both changed their annual circulation tax to a CO_2 basis recently.

The nineteen 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.

The European automobile industry welcomes this trend towards CO_2-related car taxation. However, it regrets the lack of uniformity in the implementation of these taxes.

European auto makers therefore support taxation for passenger cars that is:

– Exclusively based on CO_2 emissions
– Technologically neutral
– Linear
– Budget neutral

A detailed overview of CO_2 taxation in the EU can be found at:
http://www.acea.be/images/uploads/files/CO_2_tax_overview.pdf

SOURCE: ACEA TAX GUIDE 2012

6

Tax incentives for electric vehicles

Incentives for electrically chargeable vehicles are now applied in all Western European countries. The incentives mainly consist of tax reductions and exemptions in countries such as Belgium and the Netherlands, as well as bonus payments and premiums for the buyers of electric vehicles in Spain, Luxembourg and Portugal.

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. Innovations generally first enter the market in low volumes and at a significant cost premium, and this needs to be offset by a positive policy framework.

Electric mobility will make an important contribution towards ensuring sustainable mobility. However, advanced conventional technologies, engines and fuels will further play a predominant role for years to come.

Governments must continue to include these CO_2-efficient technologies and solutions in their overall sustainable mobility policy approach.

A detailed overview of tax incentives for electric vehicles in the EU can be found at:
www.acea.be/images/uploads/files/Electric_vehicles_overview.pdf

SOURCE: ACEA TAX GUIDE 2012

Fiscal Income from the Motor Vehicles in the EU*

	AT	BE	DK	DE	ES	FR	GR	IE	IT	NL	PT	FI	SE	UK
	€ bn 2010	€ bn 2010	DKK bn 2010	€ bn 2010	€ bn 2010	€ bn 2009	€ bn 2010	€ bn 2011	€ bn 2010	€ bn 2010	€ bn 2011	€ bn 2010	SEK bn 2010	£ bn 2010
Purchase or transfer														
1. VAT on vehicles, servicing/ repair parts, tyres	2.15	4.349	N.A.	25.75	4.242	13.604	0.342	0.382	18.1	1.304	1.719	1.339	18.5	12.5
2. Fuels & lubricants	5.102	6.27	17.218	39.99	18.383	32.261	4.293	2.521	31.315	7.663	2.498	3.362	50.5	27.01
3. Sales & registration taxes	0.45	0.378	13.431		0.653	1.919	0.249	0.384	1.142	2.005	0.627	0.958		
Annual ownership taxes	1.596	1.455	10.077	8.5	2.813	1.27	1.59	0.99	6.61	3.608	0.396	0.67	13.5	5.84
Driving license fees		0.007		0.01	0.08	-				0.239				
Insurance taxes	0.324	0.734	1.855	3.5	0.692	3.934			4.051			0.284	3.1	
Tolls	1.409		0.356			9.35			1.422					
Customs duties		0.093		0.525		-					0.03			
Other taxes	0.57	0.652		0.82	0.372	1.201	0.055		5.186	1.315	0.37		6.5	1.5
TOTAL	**11.601**	**13.938**	**42.937**	**79.095**	**27.235**	**63.539**	**6.529**	**4.277**	**67.826**	**16.134**	**5.64**	**6.613**	**92.1**	**46.85**
EURO	**11.6**	**13.9**	**5.8**	**79.1**	**27.2**	**63.5**	**6.5**	**4.3**	**67.8**	**16.1**	**5.6**	**6.6**	**10.5**	**56.6**
GRAND TOTAL = € 375.1 bn														

*no data available for other EU Member States

SOURCE: ACEA - 2012

Share of VAT in Net Price of the Car

Hungary	27 %
Denmark, Sweden	25 %
Romania	24 %
Finland, Greece, Poland, Portugal	23 %
Latvia	22 %
Belgium, Ireland, Italy, Lithuania	21 %
Austria, Bulgaria, Czech Republic, Estonia, Slovakia, Slovenia, UK	20 %
France	19.6 %
Germany, Netherlands	19 %
Malta, Spain	18 %
Cyprus, Luxembourg	15 %

SOURCE: ACEA - 2012

Excise Duties on Fuels in € / 1,000 litres

	AT	BE	BG	CY	CZ	DE	DK	EE	ES	FI	FR	EL	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	UK	**EU** minimum rates
Unleaded Petrol	482	628	663	359	516	655	587	423	456	650	607	670	419	587	704	434	462	408	469	730	380	584	360	617	491	515	674	359
Diesel	397	428	322	330	440	470	444	393	331	470	428	412	386	479	593	302	302	330	382	431	330	366	316	509	362	368	674	330

SOURCE: EUROPEAN COMMISSION - 2012

EU27

- **AT** Austria
- **BE** Belgium
- **BG** Bulgaria
- **CY** Cyprus
- **CZ** Czech Republic
- **DE** Germany
- **DK** Denmark
- **EE** Estonia
- **EL** Greece
- **ES** Spain
- **FI** Finland
- **FR** France
- **HU** Hungary
- **IE** Ireland
- **IT** Italy
- **LT** Lithuania
- **LU** Luxembourg
- **LV** Latvia
- **MT** Malta
- **NL** Netherlands
- **PL** Poland
- **PT** Portugal
- **RO** Romania
- **SE** Sweden
- **SI** Slovenia
- **SK** Slovakia
- **UK** United Kingdom

OTHERS

- **CH** Switzerland
- **IS** Iceland
- **NO** Norway
- **RS** Serbia
- **RU** Russia
- **TR** Turkey
- **UA** Ukraine

EUROPE EU27 + EFTA
EFTA Iceland + Norway + Switzerland
NAFTA USA + Canada + Mexico
BRIC Brazil + Russia + India + China
MERCOSUR Argentina + Brazil + Paraguay + Uruguay
ASEAN Brunei + Cambodia + Indonesia + Laos + Malaysia + Myanmar + Philippines + Singapore + Thailand + Vietnam

AAA Association Auxiliaire de l'Automobile
VDA Verband der Automobilindustrie
OICA Organisation Internationale des Constructeurs d'Automobiles

CARS

- **PC** Passenger Cars
- **SUV** Sport Utility Vehicles
- **MPV** Multi-Purpose Vehicles

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

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

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

ACEA

EUROPEAN
AUTOMOBILE
MANUFACTURERS
ASSOCIATION

www.acea.be