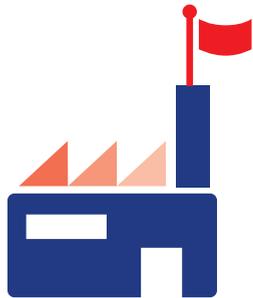


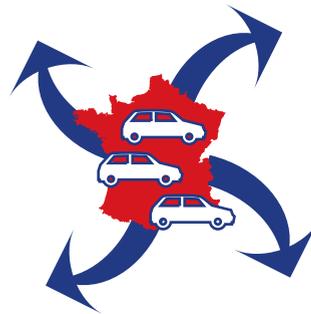


EUROPE'S
#2
AUTOMOTIVE INDUSTRY
(EUROSTAT)

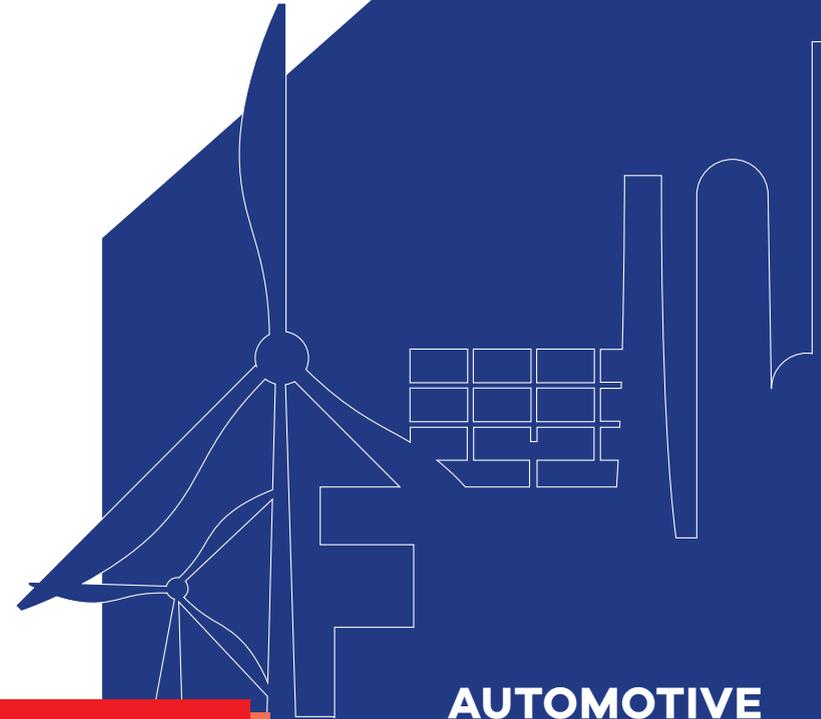
ACCESS TO A MARKET OF
67
MILLION CONSUMERS
AND A GATEWAY TO EMEA MARKETS
(INSEE)



#1
HOST COUNTRY FOR
FOREIGN INVESTMENT
PROJECTS
(EY)



FRENCH AUTOMOTIVE
INDUSTRY:
4.2%
INCREASE IN EXPORTS
IN 2018
(DOUANES)



KEY INFO IN
10
POINTS

**AUTOMOTIVE
INDUSTRY
& INNOVATION**

HIGH-TECH INDUSTRIES

APRIL 2019

1 A DRIVING FORCE

With 2.2 million passenger cars registered in France in 2018 (up 3%), France is ranked third in Europe (European Automobile Manufacturers' Association, ACEA). In 2016, there were 1,925 companies operating and more than 197,000 people employed in the automobile industry (made up of automakers and equipment manufacturers). In 2018, French exports of vehicles and automotive equipment amounted to €50.5 billion, up 4.2% compared with 2017. (French Customs Authorities)

2 #2 MARKET IN EUROPE

In 2016, the French automotive industry was the second largest in Europe in terms of revenues after Germany (€482 billion) (Eurostat). France is the continent's third largest producer of passenger cars (1.7 million in 2018), after Germany (4.9 million), and Spain (2.2 million), with production having increased for the fifth year in a row. (European Automobile Manufacturers' Association, ACEA)

3 GLOBAL BRANDS

France has two companies among the world's top 10 car manufacturers (Renault, 9th, and PSA, 10th) and two among the top 10 equipment manufacturers (Faurecia, 8th, and Valeo, 9th). French companies account for 8% of global vehicle production (with 7.8 million vehicles produced in 2017, up 17%) and have 78 production and assembly sites worldwide. They sell 81% of their production abroad. (CCFA)

4 ELECTRIC VEHICLES ON THE UP

With more than 31,000 new registrations in 2018, up 24% on 2017, France is ranked third in Europe for the overall number of electric cars (Automobile propre, 2019). At the end of 2018, France had 23,019 charging points, up 15% compared with the end of 2017 (Gireve). Among the objectives laid out in the sector contract, which was signed in May 2018, is the roll-out of 100,000 electric terminals by 2022.

5 BUOYANT R&D SPENDING

The French automotive industry spends the highest amount of money on R&D out of any other sector. In 2016, its R&D spend came to €4.2 billion, representing 13% of all business enterprise R&D expenditure. There are more than 29,600 researchers and R&D technicians in the French automotive industry (MESRI, 2018). Valeo and PSA are among the companies that filed the most patents in France - 14% combined - in 2017. (INPI)

6 GREENER FUELS

Created in 2015, French startup HySiLabs has developed a hydrogen-based, environmentally-friendly liquid fuel which works in a similar way to conventional fuels. Michelin and Faurecia have created a subsidiary in partnership with the startup Symbio to expand into the production of hydrogen fuel cells. Both France and Germany have highlighted the need for a European production line for electric batteries.

7 MANUFACTURERS INVESTING IN THE FUTURE

World-class French manufacturers are developing future-ready transport systems: the Renault ZOE (with a range of 300 km) and Twizy (7 g CO2/km), PSA Peugeot-Citroën with its iOn and Partner models, Bolloré and the Bluecar, as well as Valeo, Faurecia, Plastic Omnium, Michelin, and Schneider Electric, etc. These manufacturers are also investing in R&D by acquiring startups: Total bought G2mobility, a French startup that offers charging solutions for electric vehicles.

8 AN ATTRACTIVE SECTOR

In 2018, France welcomed 43 foreign investment projects from car and equipment manufacturers, creating 1,854 jobs. German company Continental AG has created 161 new jobs at its Toulouse site, the majority of which are in manufacturing and R&D.

9 FRENCH STARTUPS GOING INTERNATIONAL

In 2018, electric scooter operator Cityscoot raised €40 million to expand its network and set up in several European cities. Paris-based Drust's Superdrive application, which helps drivers to improve their driving behavior, was awarded a prize at CES 2019, as was Geoflex, which develops satellite positioning solutions that are essential for driverless vehicles. Meanwhile, Navya and Easymile both offer autonomous vehicle solutions to clients around the world.

10 DRIVERLESS VEHICLES

More than 100,000 km of driverless vehicle tests have already taken place in France (CCFA). Navya, the French leader in the sector which offers autonomous vehicle solutions, launched the first autonomous four-wheel drive electric shuttle in Val Thorens in early 2019, while Toulouse-based Easymile raised €6.5 million at the end of 2018 to develop driverless tractors.