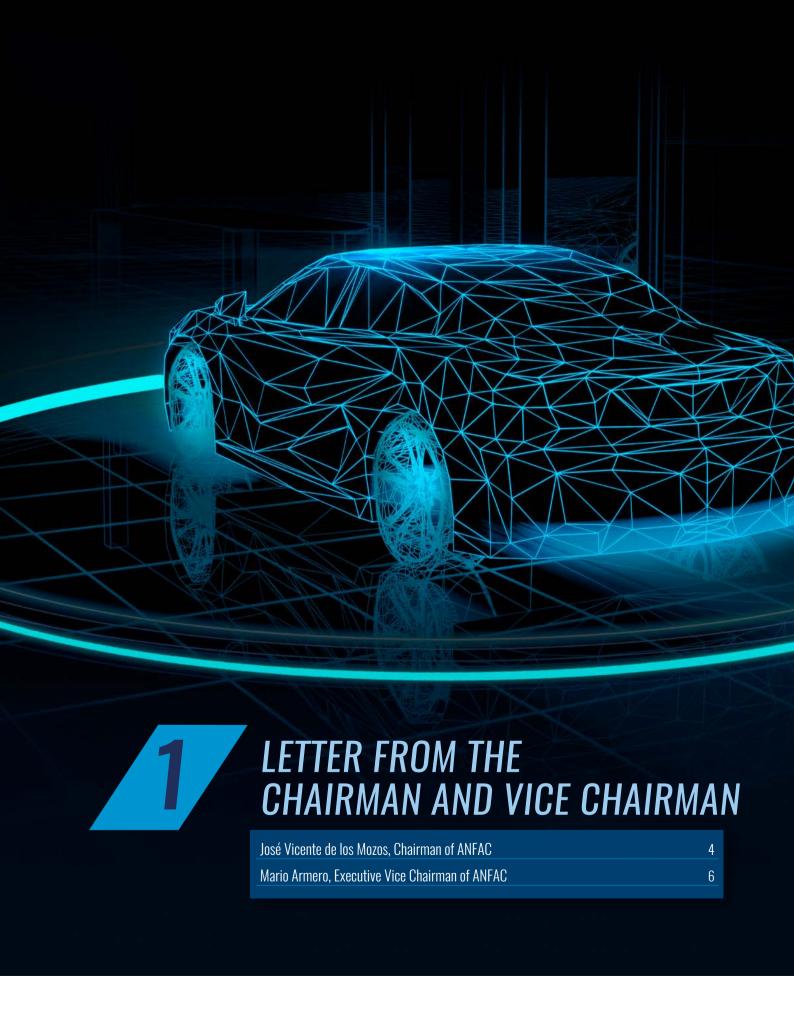


INDEX

CHAIRMAN AND VICE CHAIRMAN	3	4 VEHICLE REGISTRATIONS	32
José Vicente de los Mozos,		4.1 Registrations in Spain	33
	4	4.2 Registrations by power source	41
Mario Armero, Executive Vice Chairman of ANFAC	6	4.3 Registrations in Europe	44
BASIC FIGURES OF THE SECTOR	8	5 VEHICLE STOCK	47
Vehicle registrations	10	C	
Vehicle stock	10	TURNOVER AND TAXATION	51
Share of GDP and employment	11_		
		7 MILESTONES OF THE YEAR	55
VEHICLE PRODUCTION AND EXPORTS	12		
Production	13	Q	
Exports	26_	O TRANSPARENCY PORTAL	66
	CHAIRMAN AND VICE CHAIRMAN José Vicente de los Mozos, Chairman of ANFAC Mario Armero, Executive Vice Chairman of ANFAC Production and exports Vehicle registrations Vehicle stock Share of GDP and employment VEHICLE PRODUCTION AND EXPORTS Production	Some vicente de los Mozos, Chairman of ANFAC 4	CHAIRMAN AND VICE CHAIRMAN 3 WEHICLE REGISTRATIONS José Vicente de los Mozos, 4 4 4 4 4 4 4 4 4











An ongoing battle for competitiveness

Over recent years, mobility, in its widest sense, has revolutionised the environment in which the automotive industry works. Private vehicles as individual possessions now form part of an ecosystem in which on-demand mobility is hugely important, where the way in which we travel depends on our needs and circumstances at the time. Mobility is a right for the public it is their right to move when, how and where they want. But the definition of this does not depend solely on governments, vehicle manufacturers or providers of technological applications. This definition is the responsibility of all of us, as a society. We have to define the type of mobility that is most appropriate for Spain, and under what conditions. Here at ANFAC, we believe mobility has to be smart, emission free, accessible and affordable, with a common model applicable to the whole of Spain in a consistent and orderly way.

The world is changing, and we are changing with it. For our part, manufacturers are fully committed to this change. We are already adapting our offering to the changing demands of the public for more efficient technologies that reduce emissions and increase connectivity, safety and comfort. In this new environment, the concept of linear production (design, manufacture and selling of vehicles) is disappearing, and being replaced by an ecosystem of

different suppliers and services, in which new components and technologies play a leading role. The car of the future will be a "smartphone with wheels". This opens up a range of challenges, but also offers new business possibilities in which vehicle manufacturers have to be involved.

Spain is one of the leading manufacturers of vehicles in Europe and the world. It has to position itself robustly in this new environment, so as not to lose its 3% share of global car production or its position as the second largest European producer. We are Spain's biggest export industry. We account for 10% of GDP with a widespread geographical presence of 17 factories in ten autonomous communities. This has fostered the creation and growth of a substantial supporting industry for components, the closeness of which is very positive for our competitiveness.

The key to protecting this robust presence is to fight ceaselessly to enhance the competitiveness of our factories. Just doing this once is not enough, because this is not a sprint but a never-ending relay. We need to attract the investment and models to meet these new needs and consumer demands. This means more efficient vehicles with better technological equipment, but also mobility services that









The Industry minister, Reyes Maroto (in the centre), with ANFAC's management board

give the user greater flexibility and meet their transport needs. We are doing our duty, with more than €10 billion invested over the last five years. Over 60% of the models that will come onto the market over the coming months will have electric or hybrid versions, together with the most advanced and efficient combustion engines.

But as I said at the beginning, the definition of mobility that we want as a country will not be decided by the manufacturers alone, and, in our multi-faceted environment, neither can we work on the competitiveness of our factories in isolation. Today, more than ever, we need administrations, social agents, workers and society as a whole to retain this presence. We need a flourishing market and demand for electric vehicles if we want to consolidate the manufacture of such models in Spain. If the penetration of electric vehicles in Spain is only 0.5%, it is very difficult to attract models to be made here. We need to increase our recharging infrastructure exponentially, and commit to scrappage and purchase plans to refresh our vehicle stock. We are not going to manufacture just for export, and demand will not arrive if we do not facilitate the conditions.

We need industrial reforms to reduce logistical and energy costs to the levels of the countries around us. We are a creative and dynamic country, but we struggle to make decisions that are structured and stable over time. We need to make progress on implementing these solutions. This is why ANFAC is working on a Strategic Plan for 2030, which will be a constructive value proposal for society as a whole in the definition of mobility and the commitment to competitiveness. This will help Spain to maintain its leadership in an industry that is of the utmost importance for the country, and the future.











Strong in the face of a challenging and changing future

For ANFAC, 2018 has been one of the most challenging years since the crisis. We have been working in a changing scenario, where environmental protection, trade wars between geopolitical blocks and local and regional politics in Spain have become even more important, if that is possible. We have been working as an association to help Spain retain its leading position in European car manufacturing against a backdrop of changing conditions, while the industry undergoes the most demanding transformation in its history.

The main element that has affected sales and production at the Spanish and European levels has been the effect of the new WLTP (Worldwide Harmonized Light-Duty Vehicles Test Procedures) and RDE (Real Driving Emissions) regulations coming into effect in September 2018. These new tests are stricter and more complete that their predecessor, the NEDC, as they set forth a much more precise basis for calculating the actual fuel consumption of a vehicle and its CO₂ (WLTP) and particle (RDE) emissions. Manufacturers are fully committed to de-carbonising

our vehicle stock. They have worked hard to adapt to these new accreditations, but the transition has not been easy. These regulations coming into force led to sales of vehicles accredited under the NEDC being brought forward to the summer months, with a resulting fall in registrations in the following months to offset this effect.

As a result, sales grew in the year as a whole by 7%, to 1.32 million vehicles. However, this growth cannot hide the fact that sales started to fall in September due to the WLTP effect, and have not yet returned to a stable growth path. This downward trend which is more pronounced in the individuals channel is influencing the current uncertainty of consumers, who are not clear about which car to buy, and who see the economic outlook for the coming months as being less promising than in the past. These decisions are further complicated by: more technologies being available to power vehicles, but with no uniformity in driving restrictions because of pollution; public demonstrations against diesel and petrol (going as far as a ban under the Climate Change







Mobility Forum and VEA Committee in Zaragoza

Act in the Balearic Islands, against which ANFAC has appealed); and the lack of adequate recharging infrastructure and stimulus plans for purchases of electric and alternative vehicles. It will be very difficult to reverse this trend if a scrappage plan is not approved in the coming months to foster consumer confidence when purchasing a vehicle, which will enable the renewal of the more than 15 million vehicles that are over 15 or 20 years old. If we want to improve the air quality in our cities and safety on our roads, these vehicles need to be replaced.

Vehicle production in Spain has also been impacted by the WLTP and RDE coming into effect. The difficulty of accessing engines approved under the new regulations, together with distortions in demand caused by the weakness in production, has also been compounded by lower sales in some major export markets, such as Turkey and the UK, because of their own particular difficulties. This resulted in a 1% fall in production to 2.82 million units, losing eighth place in the rankings of global vehicle manufacturers. This is worrying, but not desperate. **Spanish factories are now**

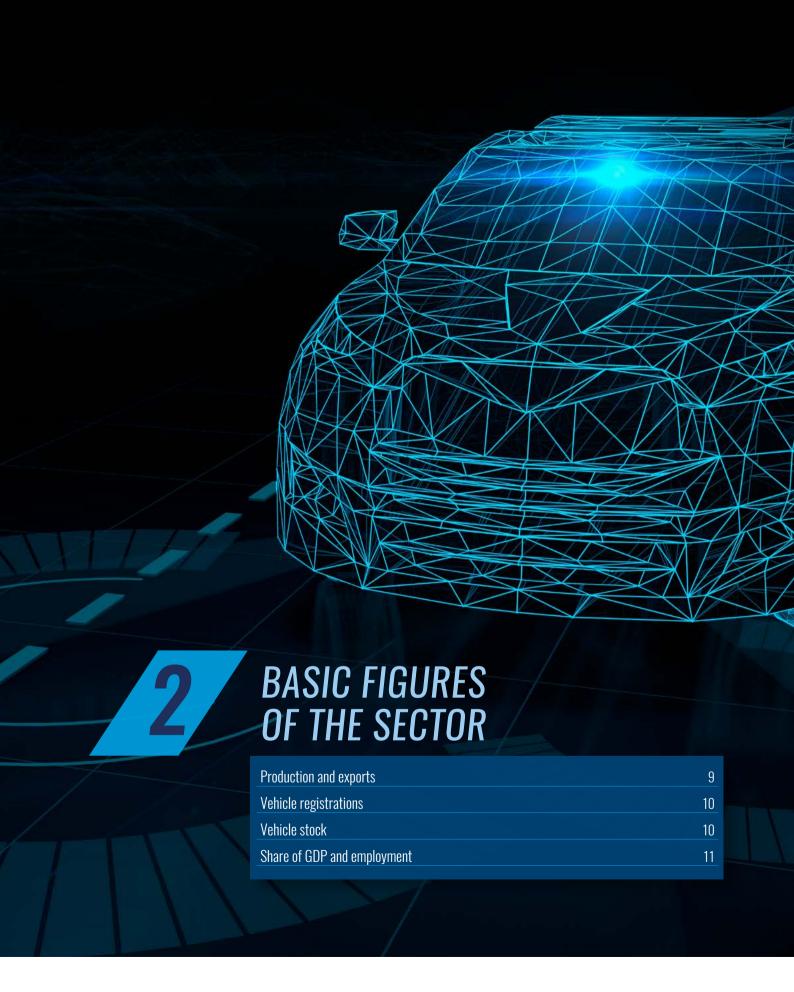
adapting, not just to these geo-political difficulties, which affect a sector that is highly export driven, but also to the changes affecting the industry in general, towards shared, connected, autonomous electric vehicles. ANFAC is working on its strategy as a sector and industry for the coming years, with a route map that will keep us strong in a future that is challenging but also replete with opportunities, in which we hope to achieve the agreement of the government, the autonomous communities, local administrations and society in general.

Mario Armero, Executive Vice Chairman of ANFAC



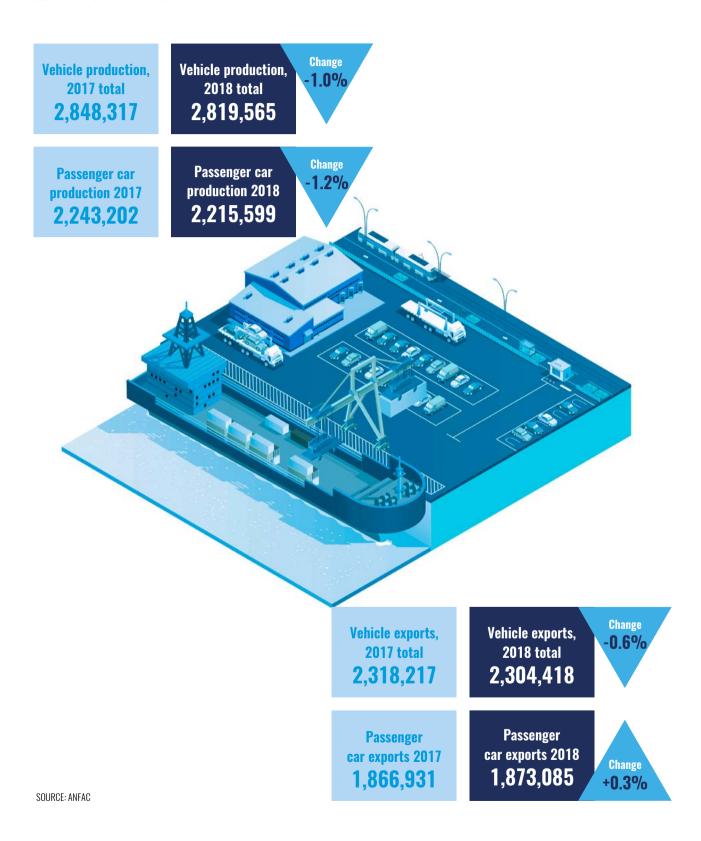






LETTER FROM THE CHAIRMAN **BASIC FIGURES VEHICLE PRODUCTION** MILESTONES TRANSPARENCY **VEHICLE VEHICLE** TURNOVER AND VICE CHAIRMAN OF THE SECTOR AND EXPORTS REGISTRATIONS STOCK AND TAXATION PORTAL OF THE YEAR

// PRODUCTION AND EXPORTS

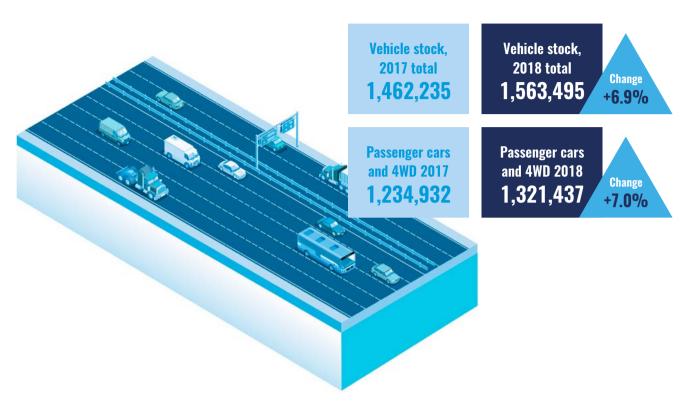




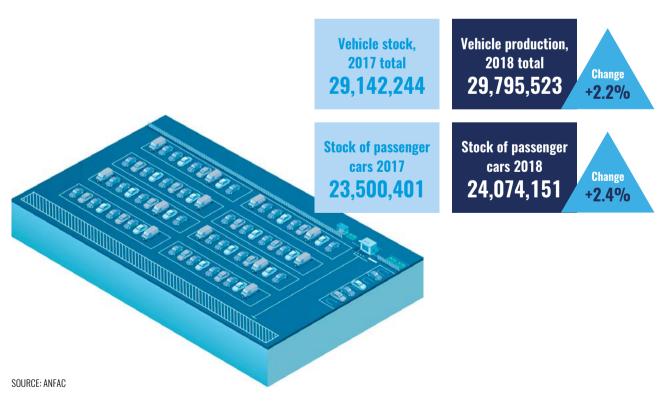


LETTER FROM THE CHAIRMAN **BASIC FIGURES VEHICLE PRODUCTION VEHICLE VEHICLE** TURNOVER MILESTONES TRANSPARENCY OF THE SECTOR REGISTRATIONS PORTAL AND VICE CHAIRMAN AND EXPORTS STOCK AND TAXATION OF THE YEAR

VEHICLE REGISTRATIONS



VEHICLE STOCK



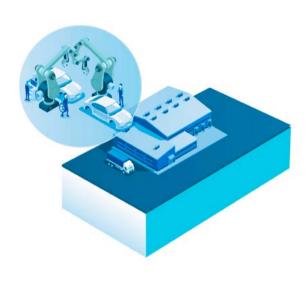






LETTER FROM THE CHAIRMAN **BASIC FIGURES VEHICLE PRODUCTION VEHICLE VEHICLE** TURNOVER **MILESTONES** TRANSPARENCY OF THE SECTOR AND VICE CHAIRMAN AND EXPORTS REGISTRATIONS STOCK AND TAXATION PORTAL OF THE YEAR

SHARE OF GDP AND EMPLOYMENT



Share of GDP¹

Total 2018 **8.6**%

Employment of active population²

Total 2018
9%

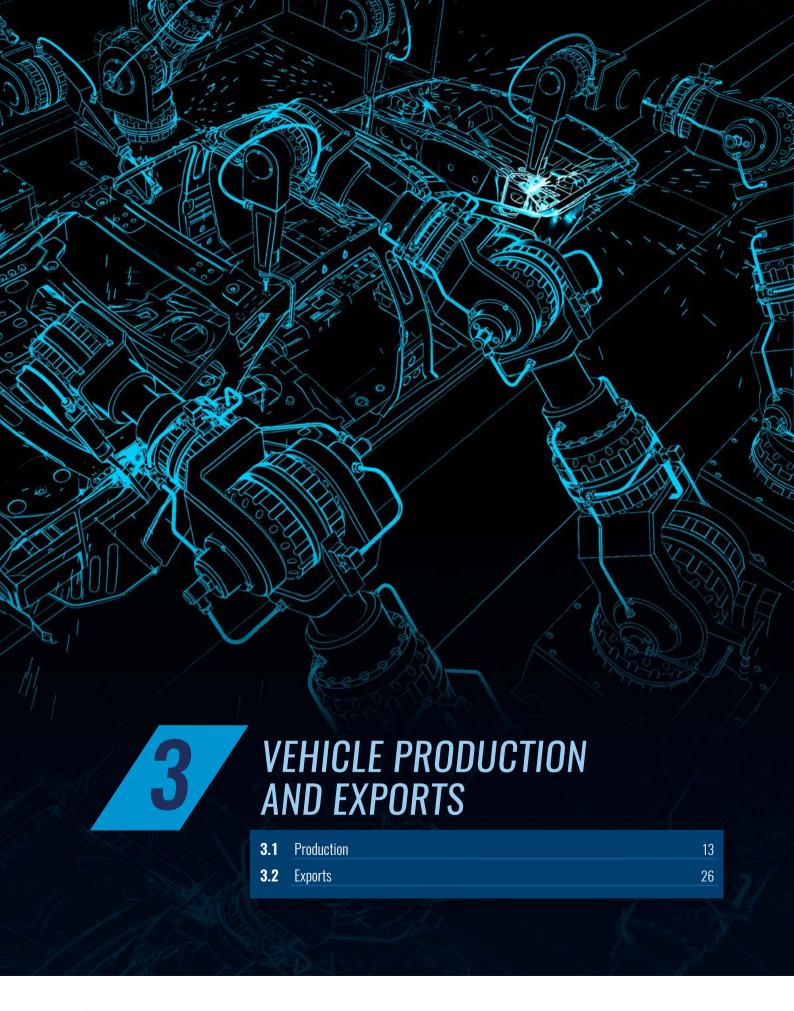
- 1 Share of the sector in GDP, estimating the contribution of other sectors related to the automotive industry (distribution, insurance, finance, etc.), the share of GDP exceeds 10%.
- 2 Includes manufacturers of vehicles and components, and complementary activities to manufacturing, distribution and marketing, such as after-sales, financial services and insurance, transport, service stations, rentals and driving schools.











3.1 PRODUCTION



Vehicle production in Spain in the year stood at **2,819,565**, 1% down on the previous year.

2018 started well for Spanish factories, with a 4.2% increase in units produced in the first half of the year, **returning to growth** through efficient adaptation of production lines for the production of new models. These efforts maintained a positive trend in factory output until August.

However, from September onwards a number of factors began to weigh on production, which ended the year slightly down. These factors included: the entry into force of the new WLTP emission-measurement regulations, which brought forward many vehicle purchases into the summer months; difficulties experienced by factories in sourcing engines accredited under the new regulations; falling sales of diesel vehicles; and a gradual slackening of Spanish and European demand.

As a result, **Spain lost its position as the eighth largest global car producer in 2018** to Brazil, which manufactured 2,879,809 units, 60,244 more than Spain.

Another significant development was France producing more light commercial vehicles than Spain, which had been the leading producer in Europe, for the first time in over ten years. The volumes manufactured were also affected by new models coming onto the production lines, gradually replacing previous models. However, France is investing heavily in its automotive production facilities, and will therefore continue to increase its output. Against this backdrop, Spain, which is playing in an ever more competitive environment, undertook far-reaching reforms to increase its industrial competitiveness.

In terms of Autonomous Communities, Catalonia was the largest vehicle producer in 2018, improving on its position in 2017, followed by Castilla y Leon, with Aragon in third place.

For the first time in 20 years, France produced more commercial vehicles than Spain







// Map of factories with models









		CNG	LPG	Electric	Excl. European	Excl. global
VIGO	PSA GROUPE / CITROËN / PEUGEOT					
	Citroën Berlingo	-	-	✓	-	✓
	Citroën C4 Spacetourer	-	-	-	-	✓
	Citroën C-Elysse	-	-	-	-	-
	Opel Combo	-	-	-	-	✓
	Peugeot 301	-	-	-	-	-
8- 8	Peugeot Rifter	-	-	✓	-	✓

















		CNG	LPG	Electric	Excl. European	Excl. global
AVILA	NISSAN					
	Nissan NT 400	-	-	-	-	-
PALENCIA	RENAULT					
	Renault Kadjar	-	-	-	-	✓
	Renault Megane IV and Sport Tourer IV	-	-	-	-	✓
VALLADOLID	RENAULT					
	Renault Captur	-	-	-	-	✓
	Renault Twizy	-	-	-	-	✓
	K9 diesel engines	-	-	-	-	-
	H4Bt and H5F petrol engines	-	-	-	-	-
VALLADOLID	IVECO					
	Iveco Daily	-	-	-	-	-







		CNG	LPG	Hybrid version	Excl. European	Excl. global
VALENCIA	FORD					
	Ford Galaxy	-	-	-	-	✓
	Ford Mondeo and Mondeo Hybrid	-	-	✓	-	-
	Ford Kuga	-	-	-	✓	-
	Ford S-Max	-	-	-	-	✓
	Ford Transit Connect	-	-	-	-	✓
	Ford Tourneo Connect	-	-	-	-	-
	Ecoboost engines (petrol)	-	-	-	-	-

















		CNG	LPG	Electric	Excl. European	Excl. global
ZARAGOZA	PSA GROUPE / CITROËN / OPEL					
	Citroën C3 Aircross	-	-	-	-	-
	Opel Corsa	-	-	-	-	-
	Opel Crossland X	-	✓	-	-	-
	Opel Mokka X	-	✓	✓	-	-









•		CNG	LPG	Electric	Excl. European	Excl. global
MADRID	PSA GROUPE / CITROËN					
	Citroën C4 Cactus	-	-	-	-	✓
MADRID	IVECO					
	Iveco Stralis	✓	-	-	-	✓
	lveco Trakker	-	-	-	-	✓





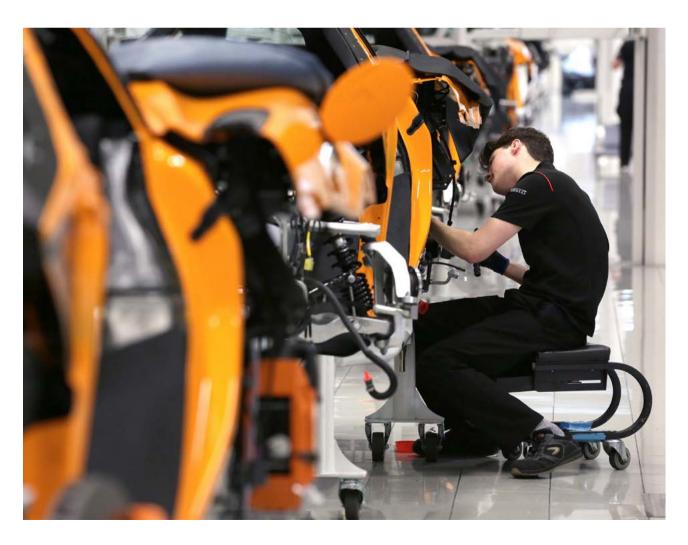








	•	CNG	LPG	Electric	Excl. European	Excl. global
SANTANDER	MERCEDES-BENZ					
	Mercedes-Benz OC 500 chassis	-	-	-	-	-
SANTANDER	NISSAN					
	Nissan components	-	-	-	-	-













		CNG	LPG	Electric	Excl. European	Excl. global
NAVARRA	VOLKSWAGEN					
	Volkswagen Polo	-	-	-	-	-
	Volkswagen T-Cross	-	-	-	-	✓





SEVILLE	RENAULT	CNG	LPG	Electric	Excl. European	Excl. global
	Renault transmissions	-	-	-	-	-





		CNG	LPG	Electric	Excl. European	Excl. global
ALAVA	MERCEDES-BENZ					
	Mercedes Vito 2018	-	-	✓	✓	-
	Mercedes V class	-	-	-	-	-











45		CNG	LPG	Electric	Excl. European	Excl. global
BARCELONA	SEAT					
	Audi A1	-	-	-	-	✓
	Audi Q3 (Until August 2018)	-	-	-	-	-
	Seat Arona	✓	-	-	-	✓
*	Seat Ibiza	✓	-	-	-	✓
	Seat León	✓	-	-	-	✓
1	Transmissions	-	-	-	-	-
BARCELONA	NISSAN					
	Renault Alaskan	-	-	-	-	-
	Mercedes X class	-	-	-	-	-
	Nissan Navara	-	-	-	✓	-
	Nissan NV 200	-	-	✓	✓	-
	Nissan diesel engines					





// Exclusive global production







Renault Kadjar



Renault Captur



Volkswagen T-Cross



Renault Megane



Renault Twizy





Ford Transit



Ford Galaxy



Ford S-Max





Citroën Berlingo



C4 Spacetourer



Peugeot Rifter



C4 Cactus



Opel Combo





Seat Ibiza



Seat León



Seat Arona

 ∞





Audi A1



Iveco Trakker



Iveco Stralis

SOURCE: ANFAC

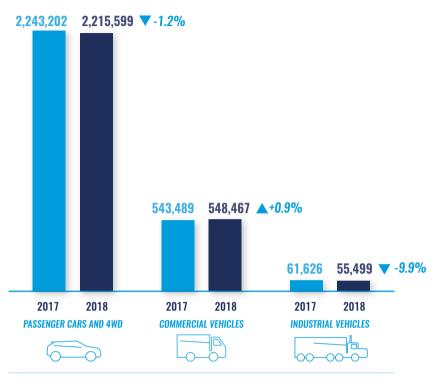






LETTER FROM THE CHAIRMAN **BASIC FIGURES VEHICLE PRODUCTION VEHICLE VEHICLE** TURNOVER **MILESTONES** TRANSPARENCY STOCK OF THE SECTOR REGISTRATIONS AND TAXATION PORTAL AND VICE CHAIRMAN **AND EXPORTS** OF THE YEAR

Vehicle production (Units and change 17/18)

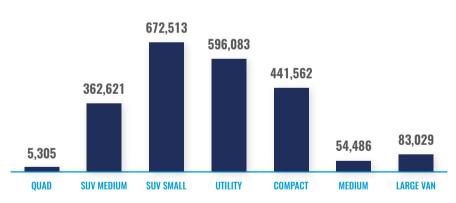


Total 2018
2,819,565

Total 2017
2,848,317

SOURCE: ANFAC

Spanish production of passenger cars by segment (Units)



Total 2018 **2,215,599**

SOURCE: ANFAC

Spanish production by vehicle type

	2013	2014	2015	2016	2017	2018	Change 17/18
Passenger cars	1,719,700	1,871,985	2,202,348	2,313,409	2,243,202	2,215,599	-1.2%
Light commercial (derivatives of passenger cars, pick ups, vans)	389,951	473,204	472,725	513,459	543,489	548,467	0.9%
Industrial (light and heavy industrial vehicles and tractor units)	53,687	57,789	58,128	65,039	61,626	55,499	-9.9%

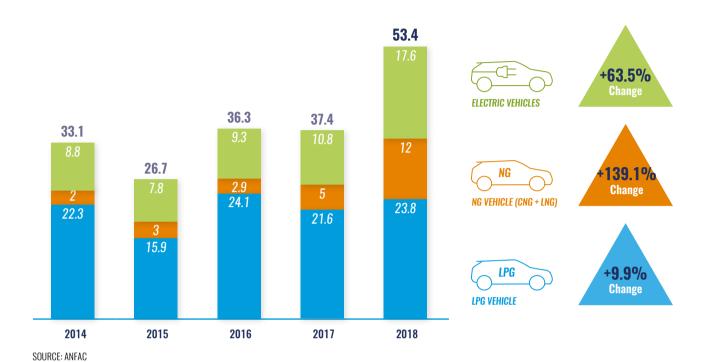
SOURCE: ANFAC



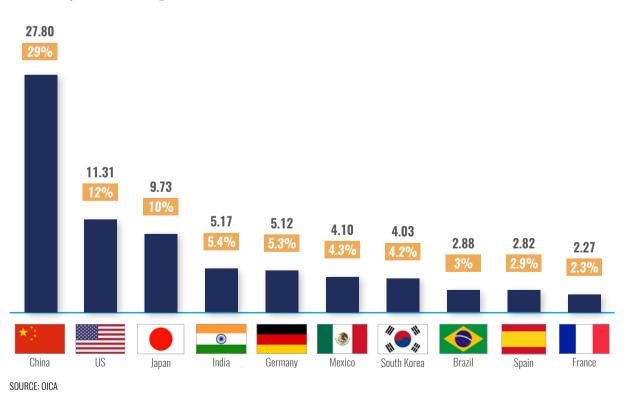




Alternative models produced (Thousands of units, all vehicle types)



Global producer rankings (Million units and market share)







Vehicle production by country

Total Europe 2018 **21,334,051**



	2017	2018	Change 17/18
EU 27	18,358,506	17,955,708	-2.2%
EU 15	14,358,438	13,743,886	-4.3%
Austria	97,200	164,900	69.7%
Belgium	377,002	308,493	-18.2%
Finland	108,839	112,104	3.0%
France (passenger cars and light commercial)	2,226,000	2,270,000	2.0%
Germany (passenger cars and light commercial)	5,645,584	5,120,409	-9.3%
Italy	1,142,210	1,060,068	-7.2%
Portugal	175,544	294,366	67.7%
Spain	2,848,317	2,819,565	-1.0%
UK	1,749,385	1,604,328	-8.3%
EU new members	4,000,068	4,211,822	5.3%
Czech Rep.	1,305,865	1,345,041	3.0%
Hungary	418,435	430,988	3.0%
Poland	689,783	659,646	-4.4%
Rumania	363,688	476,769	31.1%
Slovakia	1,032,445	1,090,000	5.6%
Slovenia	189,852	209,378	10.3%
Europe, other	1,580,000	1,828,193	15.7%
Serbia	79,000	56,449	-28.5%
CIS	1,617,000	1,910,744	18.2%
Russia	1,551,909	1,767,674	13.9%
Belarus	13,428	23,235	73.0%
Kazakhstan	19,071	31,545	65.4%
Ukraine	8,586	6,623	-22.9%
Uzbekistan	140,247	220,667	57.3%
Turkey	1,695,731	1,550,150	-8.6%
Europe, total	21,634,237	21,334,051	-1.4%

SOURCE: OICA







TOTAL WORLDWIDE 2018 **95,634,593**

Change -1.1%

Total America 2018 **20,727,528** Total Africa 2018 1,003,859 Total Asia-Oceania 2018 **52,447,378** TOTAL WORLDWIDE 2017 **96,671,427**

	2017	2018	Change 17/18
NAFTA	17,478,820	17,436,070	-0.2%
Canada	2,194,003	2,020,840	-7.9%
Mexico	4,094,832	4,100,525	0.1%
US	11,189,985	11,314,705	1.1%
South America	3,158,210	3,291,458	4.2%
Argentina (passenger cars and light commercial)	473,408	466,649	-1.4%
Brazil	2,736,802	2,879,809	5.2%
America, total	20,637,030	20,727,528	0.4%
Algeria	60,606	70,597	16.5%
Egypt	36,600	71,400	95.0%
Morocco	341,802	402,085	17.6%
South Africa	589,951	610,854	3.5%
Tunisia	1,900	1,700	-8.0%
Africa, total	1,003,859	1,125,636	12.1%
China	29,015,434	27,809,196	-4.2%
India	4,792,231	5,174,645	8.0%
Indonesia	1,218,106	1,343,714	10.3%
Iran	1,515,396	1,095,526	-27.7%
Japan	9,690,674	9,728,528	0.4%
Malaysia	503,000	565,000	12.3%
Pakistan	251,000	269,000	7.2%
South Korea	4,114,913	4,028,834	-2.1%
Taiwan	291,563	253,241	-13.1%
Thailand	1,988,823	2,167,694	9.0%
Vietnam	236,161	236,000	-0.1%
Asia-Oceania, total	53,396,301	52,447,378	-1.8%
GLOBAL TOTAL	96,671,427	95,634,593	-1.1%

SOURCE: OICA









Vehicle exports from Spain fell by 0.6% in 2018, to 2,304,418 million. Despite the fall in the year, the automotive sector remained the country's leading export sector, worth over 35,741 million euros, making a positive contribution to Spain's balance of trade of 13,728 million euros.

Spanish factories are continuing to diversify their exports. One of the highlights of 2018 was the growth in exports to Africa, which were 48.5% higher than in 2017, with Algeria, Morocco, Egypt, South Africa and Tunisia showing the highest growth on the continent. Exports to Oceania were also important for Spain, growing by 34.6%. In Europe, despite the weakness of Spain's four major importing countries, our factories managed to increase their sales across the European Union as a whole, rising by 1.6% to 2 million vehicles.

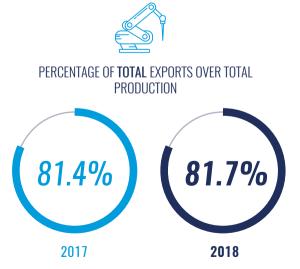
However, America and Asia fell by 6.5% and 41.5%, respectively, in 2018, because of the difficulties facing markets in the US, Canada, Argentina and Uruguay during the year. Increases in exports to Mexico, Chile and Brazil were not sufficient to offset these falls.

Spain has diversified its export markets considerably over the last seven years. This means it can now offset weaknesses in some markets with sales to others. However, a number of factors are menacing sales to markets outside our borders, such as: increasing protectionist measures in several markets: the Brexit negotiations; trade wars between blocks of countries; and logistical costs that are higher than in neighbouring countries. The automotive sector is served well by the free market and it is important to work to foster positive trade relations with other countries.

Vehicle exports

	2017	2018	Change 17/18
Passenger car exports	1,866,931	1,873,085	0.3%
Commercial vehicle exports	415,358	409,327	-1.4%
Industrial vehicle exports	35,928	22,006	-38.7%
Total	2,318,217	2,304,418	-0.6%

SOURCE: ANFAC



SOURCE: ANFAC



PERCENTAGE EXPORTS OF **VEHICLES** AS A SHARE OF SPANISH EXPORTS



SOURCE: ANFAC, based on data from the Tax Agency - Ministry of Industry, Commerce and Tourism

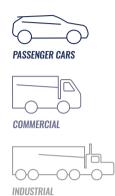




LETTER FROM THE CHAIRMAN **BASIC FIGURES VEHICLE PRODUCTION** MILESTONES TRANSPARENCY **VEHICLE VEHICLE** TURNOVER AND VICE CHAIRMAN OF THE SECTOR AND EXPORTS REGISTRATIONS STOCK AND TAXATION PORTAL OF THE YEAR

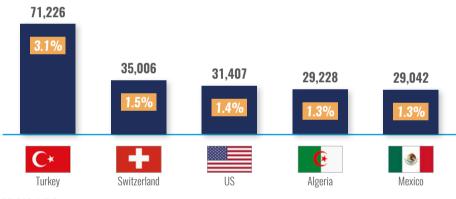
Spanish exports by vehicle type (Thousand units and change 2017-2018)





SOURCE: ANFAC

Exports outside the European Union. Top 5 countries (Value and percentage share)



8.6% of exports outside the EU go to these five countries

SOURCE: ANFAC

Vehicle export destinations. Top 15 (Share of total exports)

	2018	Share
France	437,095	19.0%
Germany	421,496	18.3%
UK	287,422	12.5%
Italy	241,333	10.5%
Belgium	92,016	4.0%
Turkey	71,226	3.1%
Holland	65,578	2.8%

	2018	Share
Austria	56,071	2.4%
Poland	55,645	2.4%
Portugal	48,794	2.1%
Switzerland	35,006	1.5%
Denmark	34,649	1.5%
US	31,407	1.4%
Sweden	30,767	1.3%
Algeria	29,228	1.3%







Vehicle export destination countries (Total percentage and units)

	2018	Share
Europe	2,100,422	91.15%
France	437,095	19.0%
Germany	421,496	18.3%
UK	287,422	12.5%
Italy	241,333	10.5%
Belgium	92,016	4.0%
Holland	65,578	2.8%
Austria	56,071	2.4%
Portugal	48,794	2.1%
Denmark	34,649	1.5%
Sweden	30,767	1.3%
Ireland	17,399	0.8%
Greece	16,365	0.7%
Finland	11,632	0.5%
Luxembourg	4,026	0.2%
Poland	55,645	2.4%
Czech Republic	29,154	1.3%
Hungary	24,922	1.1%
Rumania	19,703	0.9%
Slovenia	13,909	0.6%
Croatia	11,701	0.5%
Slovakia	11,296	0.5%
Estonia	4,336	0.2%
Bulgaria	3,102	0.1%
Latvia	1,057	0.0%
Cyprus	1,049	0.0%
Malta	912	0.0%
Lithuania	572	0.0%
Turkey	71,226	3.1%
Switzerland	35,006	1.5%
Israel	16,833	0.7%

Total Europe 2018 **2,100,422** Total America 2018 **97,979**

	2018	Share
Norway	13,859	0.6%
Russia	5,750	0.2%
Ukraine	3,408	0.1%
Serbia	1,913	0.1%
Iceland	1,024	0.0%
Bosnia Herzegovina	939	0.0%
Macedonia	833	0.0%
Albania	394	0.0%
Andorra	161	0.0%
Montenegro	160	0.0%
Belarus	145	0.0%
Europe, other	6,784	0.2%
America	97,979	4.25%
US	31,407	1.4%
Mexico	29,042	1.3%
Chile	17,445	0.8%
Argentina	9,034	0.4%
Guadalupe	2,279	0.1%
Brazil	2,012	0.1%
French Guayana	1,984	0.1%
Martinique	1,845	0.1%
Canada	1,467	0.1%
Colombia	323	0.0%
Venezuela	255	0.0%
Peru	155	0.0%
Ecuador	139	0.0%
Guatemala	135	0.0%
Uruguay	117	0.0%
Bermuda	98	0.0%
Dominican Republic	97	0.0%
Haiti	92	0.0%
Jamaica	21	0.0%
Costa Rica	12	0.0%
Curaçao	12	0.0%
Panama	4	0.0%
Cuba	3	0.0%







	2018	Share
Asia	24,087	1.05%
South Korea	6,930	0.3%
Japan	3,994	0.2%
Arab Emirates (Abu Dhabi, Dubai)	3,945	0.2%
Saudi Arabia	1,819	0.1%
Singapore	1,479	0.1%
Taiwan	1,297	0.1%
Qatar	1,212	0.1%
Hong Kong	988	0.0%
Kuwait	655	0.0%
Oman	603	0.0%
Palestine	305	0.0%
Bahrein	155	0.0%
Lebanon	142	0.0%
Jordan	99	0.0%
The Philippines	83	0.0%
Indonesia	71	0.0%
Thailand	59	0.0%
India	44	0.0%
Kazakhstan	39	0.0%
Sri Lanka	37	0.0%
Malaysia	36	0.0%
Cambodia	30	0.0%
Vietnam	20	0.0%
Myanmar	11	0.0%
Laos	10	0.0%
Brunei	9	0.0%
Uzbekistan	8	0.0%
Yemen	4	0.0%
Mongolia	3	0.0%

	2018	Share
Oceania	11,069	0.48%
Australia	9,024	0.4%
New Zealand	1,126	0.0%
French Polynesia	205	0.0%
New Caledonia	161	0.0%
Other countries	554	0.0%
Africa	70,862	3.08%
Algeria	29,228	1.3%
Morocco	12,046	0.5%
Egypt	10,314	0.4%
Dominican South Africa	8,294	0.4%
Tunisia	6,130	0.3%
Reunion	3,123	0.1%
Nigeria	1,186	0.1%
Mauritius	232	0.0%
Ivory Coast	91	0.0%
Mayotte	58	0.0%
Senegal	58	0.0%
Libya	33	0.0%
Angola	12	0.0%
Ghana	11	0.0%
Madagascar	11	0.0%
Burkina Faso	7	0.0%
Kenya	7	0.0%
Cameroon	5	0.0%
Togo	4	0.0%
Mozambique	4	0.0%
Djibuti	3	0.0%
Liberia	3	0.0%
The Seychelles	1	0.0%

Total Asia 2018 **24,087** Total Oceania 2018 11,069 Total Africa 2018 **70,862** TOTAL WORLDWIDE 2018 **2,304,418**

SOURCE: ANFAC

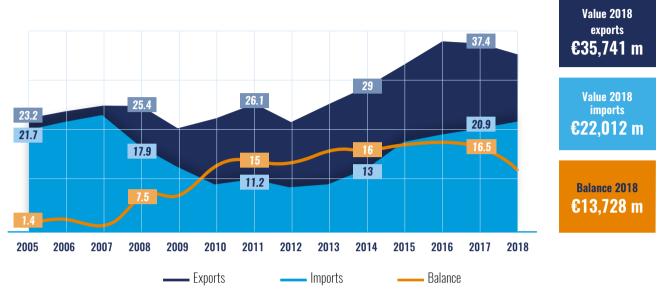






LETTER FROM THE CHAIRMAN **BASIC FIGURES VEHICLE PRODUCTION** TRANSPARENCY **VEHICLE VEHICLE** TURNOVER **MILESTONES** STOCK OF THE SECTOR REGISTRATIONS AND TAXATION PORTAL AND VICE CHAIRMAN **AND EXPORTS** OF THE YEAR

// The balance of trade in vehicles (Millions of euros)



SOURCE: ANFAC, based on data from the Tax Agency - Ministry of Industry, Commerce and Tourism

Exports, imports and balance of trade of the automotive sector (Vehicles plus components)

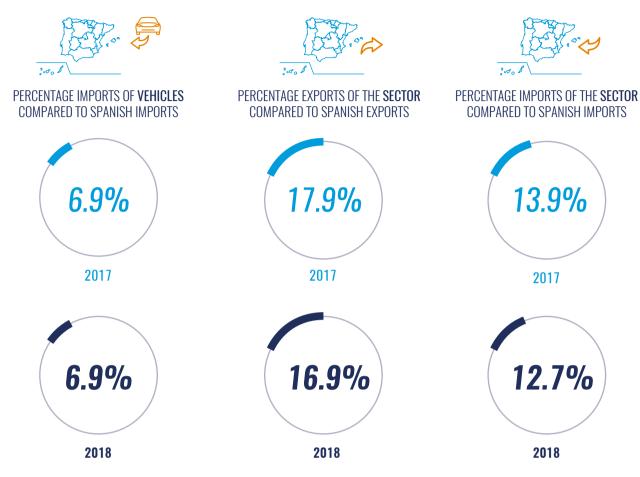
		2017	2018	Change 17/18
	Exports	30,706	29,141	-5.1%
PASSENGER CARS	Imports	17,661	18,601	5.3%
- NOOLNULK OAKO	Balance	13,044	10,540	
	Exports	6,664	6,600	-1.0%
COMMERCIALS, IND.& BUSES	Imports	3,214	3,411	6.2%
	Balance	3,451	3,188	
	Exports	9,174	9,798	6.8%
PARTS, SPARES & ACCESORIES	Imports	13,678	13,357	-2.3%
	Balance	-4,504	-3,559	
	Exports	2,928	2,695	-8.0%
	Imports	5,021	5,114	1.8%
ENGINES &TRANSMISSIONS	Balance	-2,093	-2,419	

SOURCE: ANFAC, based on data from the Tax Agency - Ministry of Industry, Commerce and Tourism







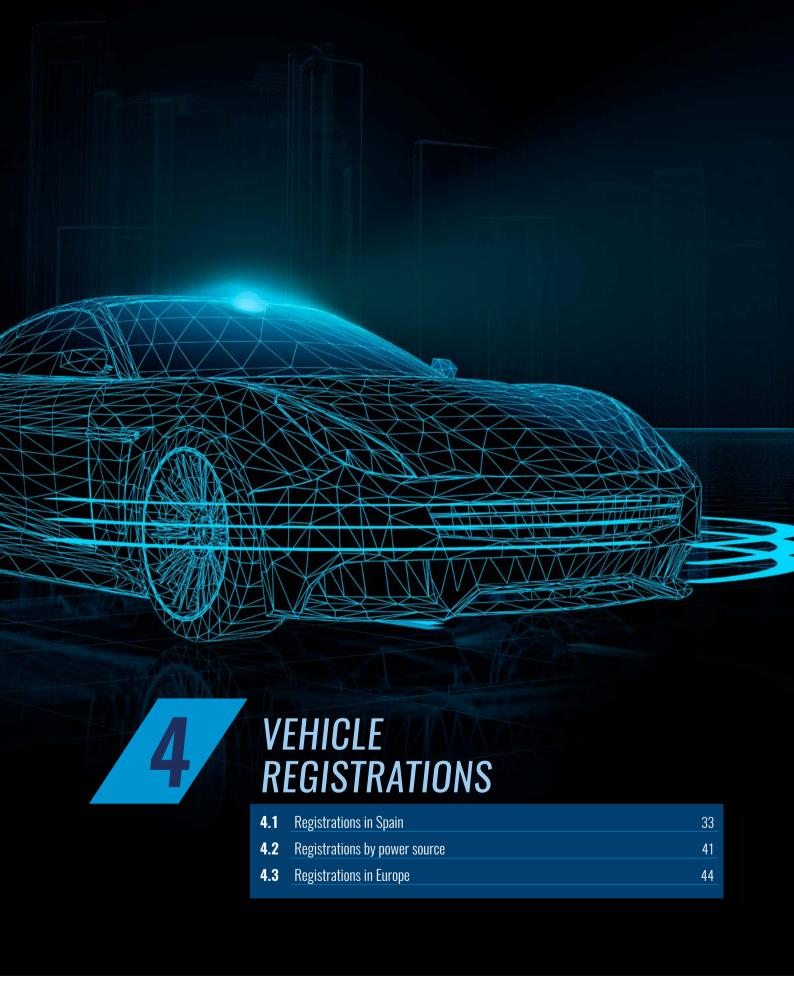


SOURCE: ANFAC, based on data from the Tax Agency - Ministry of Industry, Commerce and Tourism





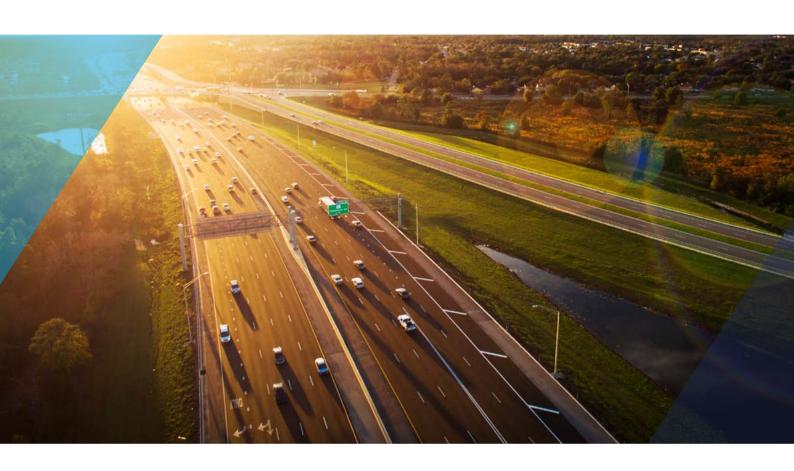








4.1 REGISTRATIONS IN SPAIN



2018 was a positive year for registrations of passenger cars and 4-wheel drives, which were up 7% on the previous year. The private sales channel continued to grow, by 3.7%, while company sales were up 13.6% and sales to rental companies rose 5.7% in the year.

Despite the total for the year and the growth in all of the channels at year end, sales fell in the last four months of 2018, something that had not been seen in Spain for six years. The private sales channel was the most affected sector in the final part of the year, with registrations down 11.2% in December. Consumer uncertainty, the weakness of the market and news of slower economic growth put a brake on purchasing intentions at the end of the year.

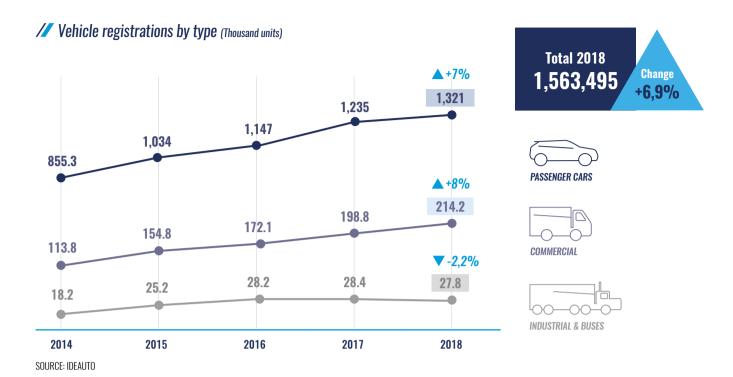
Spain had the fifth highest growth in the registration of passenger cars in the European market, behind Germany, the UK, France and Italy.

Registrations by autonomous community

Madrid had the most vehicle registrations of any autonomous community in 2018. In terms of vehicle types, registrations of passenger cars and 4-wheel drives stood out, at 456,130 units, up 13.2% on 2017. This was followed by Catalonia in second place, with 185,105 units registered, with sales down 2.8% on the previous year - this was the only autonomous community where passenger-car registrations fell in the year.







	2014	2015	2016	2017	2018	Change 17/18
Passenger cars and 4-wheel drives	855,308	1,034,232	1,147,009	1,234,932	1,321,437	7.00%
Light commercial	113,782	154,765	172,106	198,821	214,208	7.90%
Derivatives, vans and pick ups	75,733	101,068	110,066	122,242	131,221	7.35%
Light commercial vehicles <= 3.5 MT	38,049	53,697	62,040	76,579	82,987	8.37%
Industrial vehicles, micro buses and buses	18,191	25,215	28,232	28,482	27,850	-2.20%
Industrial vehicles > 3.5 MT	16,214	22,431	24,699	24,663	24,177	-1.97%
Microbuses and buses	1,977	2,784	3,533	3,819	3,673	-3.82%
Total	987,281	1,214,212	1,347,347	1,462,235	1,563,495	6.93%

SOURCE: IDEAUTO

Registrations of passenger cars and 4-wheel drives by channel

	2014	2015	2016	2017	2018
Rental	155,308	176,561	206,170	225,058	237,777
Company	216,232	283,096	328,377	370,423	420,650
Private	483,768	574,575	612,462	639,451	663,010
Total	855,308	1,034,232	1,147,009	1,234,932	1,321,437

SOURCE: IDEAUTO







// Vehicle registrations by autonomous community

Passenger cars and 4-wheel drives	2017	2018	Change 17/18
Andalusia	139,541	149,044	6.81%
Aragon	24,396	26,223	7.49%
Asturias	18,364	19,661	7.06%
Balearic Islands	34,100	34,632	1.56%
Canary Islands	60,216	63,470	5.40%
Cantabria	10,764	11,781	9.45%
Castilla-La Mancha	35,627	38,237	7.33%
Castilla y León	37,838	38,882	2.76%
Catalonia	190,480	185,105	-2.82%
Ceuta and Melilla	2,167	2,404	10.94%
Valencia region	137,068	146,194	6.66%
Extremadura	14,553	15,714	7.98%
Galicia	43,128	46,098	6.89%
La Rioja	5,418	5,644	4.17%
Madrid	402,826	456,130	13.23%
Murcia	26,510	27,274	2.88%
Navarra	12,314	13,243	7.54%
Basque country	39,622	41,701	5.25%
Passenger cars and 4-wheel drives, total	1,234,932	1,321,437	7.00%

SOURCE: IDEAUTO







Light commercial	2017	2018	Change 17/18
Derivatives, vans and pick ups			
Andalusia	12,364	12,691	2.64%
Aragon	2,275	2,517	10.64%
Asturias	1,313	1,515	15.38%
Balearic Islands	4,595	4,680	1.85%
Canary Islands	10,640	11,534	8.40%
Cantabria	995	928	-6.73%
Castilla-La Mancha	3,411	4,279	25.45%
Castilla y León	2,678	3,061	14.30%
Catalonia	18,579	17,359	-6.57%
Ceuta and Melilla	113	114	0.88%
Valencia region	11,518	11,364	-1.34%
Extremadura	1,514	1,756	15.98%
Galicia	3,015	3,255	7.96%
La Rioja	627	657	4.78%
Madrid	40,000	46,160	15.40%
Murcia	2,851	2,564	-10.07%
Navarra	1,584	1,929	21.78%
Basque country	4,170	4,858	16.50%
Derivatives, vans and pick ups, total	122,242	131,221	7.35%
Light commercial <=3.5 MT			
Andalusia	8,689	8,973	3.27%
Aragon	1,631	1,724	5.70%
Asturias	1,189	1,130	-4.96%
Balearic Islands	1,969	1,896	-3.71%
Canary Islands	4,092	3,955	-3.35%
Cantabria	781	811	3.84%
Castilla-La Mancha	2,301	2,430	5.61%
Castilla y León	2,586	2,754	6.50%
Catalonia	13,858	13,468	-2.81%
Ceuta and Melilla	48	49	2.08%
Valencia region	7,059	7,575	7.31%
Extremadura	866	923	6.58%
Galicia	2,734	2,883	5.45%
La Rioja	453	491	8.39%
Madrid	21,513	26,902	25.05%
Murcia	1,846	1,777	-3.74%
Navarra	1,178	1,325	12.48%
Basque country	3,786	3,921	3.57%
Light commercial <= 3.5 MT, total	76,579	82,987	8.37%

SOURCE: IDEAUTO

Light commercial, total





214,208



Industrial vehicles, micro buses and buses	2017	2018	Change 17/18
Industrial >3.5 MT			
Andalusia	3,887	3,530	-9.18%
Aragon	1,027	1,076	4.77%
Asturias	412	393	-4.61%
Balearic Islands	269	293	8.92%
Canary Islands	467	515	10.28%
Cantabria	403	357	-11.41%
Castilla-La Mancha	1,368	1,340	-2.05%
Castilla y León	1,460	1,389	-4.86%
Catalonia	3,401	3,410	0.26%
Ceuta and Melilla	1	4	300.00%
Valencia region	2,129	2,404	12.929
Extremadura	458	479	4.59%
Galicia	1,224	1,252	2.29%
La Rioja	189	197	4.23%
Madrid	4,924	4,634	-5.899
Murcia	1,678	1,253	-25.339
Navarra	577	701	21.49
Basque country	789	950	20.41
Industrial >3.5 MT, total	24,663	24,177	-1.97
Microbuses and buses			
Andalusia	470	382	-18.729
Aragon	76	107	40.79
Asturias	87	85	-2.30 ^o
Balearic Islands	200	168	-16.00°
Canary Islands	308	327	6.17
Cantabria	31	15	-51.61 ^c
Castilla-La Mancha	109	110	0.929
Castilla y León	263	135	-48.679
Catalonia	518	597	15.259
Ceuta and Melilla	1	2	100.009
Valencia region	205	198	-3.41
Extremadura	39	56	43.599
Galicia	244	268	9.84
La Rioja	33	30	-9.09
Madrid	798	884	10.78
Murcia	62	46	-25.81
Navarra	65	64	-1.54 ^c
Basque country	310	199	-35.81%
Microbuses and buses, total	3,819	3,673	-3.82%

SOURCE: IDEAUTO



Industrial vehicles, micro buses and buses, total



27,850

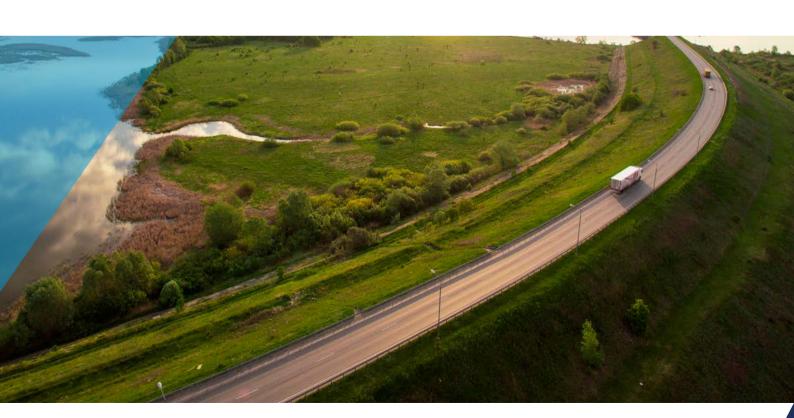
28,482



Registrations of passenger cars and 4-wheel drives by segment

	2017	Share 2017	2018	Share 2018	Change 17/18
Urban	52,517	4.25%	55,133	4.17%	4.98%
Utility	289,512	23.44%	289,413	21.90%	-0.03%
Compact	273,820	22.17%	272,865	20.65%	-0.35%
Medium	74,489	6.03%	61,163	4.63%	-17.89%
Large	9,672	0.78%	8,661	0.66%	-10.45%
Premium	2,068	0.17%	2,487	0.19%	20.26%
Sports, high	737	0.06%	740	0.06%	0.41%
Sports, low	2,201	0.18%	1,986	0.15%	-9.77%
Van, small	76,065	6.16%	67,943	5.14%	-10.68%
Van, Large	10,128	0.82%	7,753	0.59%	-23.45%
SUV small	145,334	11.77%	196,641	14.88%	35.30%
SUV medium	239,562	19.40%	288,869	21.86%	20.58%
Large SUV	45,758	3.71%	54,873	4.15%	19.92%
Premium SUV	8,335	0.67%	7,928	0.60%	-4.88%
4-wheel drives	4,734	0.38%	4,982	0.38%	5.24%
Total	1,234,932	100.00%	1,321,437	100.00%	7.00%
POLIDOF, IDEALITO					

SOURCE: IDEAUTO









Registrations of passenger cars and 4-wheel drives by make

		2017	2018	Change 17/18
(F)	Alfa Romeo	4,036	4,723	17.02%
4	Alpine	0	27	
	Aston Martin	19	15	-21.05%
ത്ത	Audi	54,939	55,216	0.50%
8	Bentley	52	52	0.00%
0	BMW	48,754	49,417	1.36%
	Buick	1	0	-100.00%
	Citroën	64,743	68,917	6.45%
DACIA	Dacia	46,398	51,928	11.92%
0	Dfsk	0	2	
ď	Dr	0	6	
K	Ds	3,675	4,325	17.69%
3	Ferrari	52	63	21.15%
(FIAT)	Fiat	54,343	58,607	7.85%
Ford	Ford	62,398	63,301	1.45%
	Honda	8,407	8,017	-4.64%
B	Hyundai	55,219	64,573	16.94%
8	Infiniti	1,849	1,759	-4.87%
~	Jaguar	3,545	4,394	23.95%
Jeep	Јеер	8,493	17,240	102.99%
(KIA)	Kia	58,949	67,786	14.99%
0	Lada	1	2	100.00%
	Lamborghini	14	15	7.14%
(AVCIA)	Lancia	37	0	-100.00%
LAND- -ROVER	Land rover	10,192	7,808	-23.39%
	Lexus	6,130	7,247	18.22%
	Lotus	3	8	166.67%

		2017	2018	Change 17/18
Ø)	Mahindra	133	156	17.29%
	Maserati	367	320	-12.81%
Θ	Mazda	18,558	21,362	15.11%
-	McLaren	4	9	125.00%
	Mercedes	52,058	52,334	0.53%
MINIF	Mini	12,136	12,713	4.75%
*	Mitsubishi	9,770	12,114	23.99%
- April	Morgan	6	5	-16.67%
7	Мрт	0	3	
NISSAN	Nissan	62,403	62,327	-0.12%
②	Opel	86,921	79,755	-8.24%
N	Peugeot	87,732	98,914	12.75%
·	Porsche	2,302	2,253	-2.13%
	Renault	101,503	96,198	-5.23%
R	Rolls Royce	3	1	-66.67%
S	Seat	94,461	107,328	13.62%
	Skoda	24,860	29,460	18.50%
0	Smart	5,990	6,288	4.97%
()	SsangYong	3,857	3,412	-11.54%
	Subaru	2,210	3,099	40.23%
\$	Suzuki	7,675	7,528	-1.92%
T	Tesla	387	323	-16.54%
1	Toyota	66,300	71,267	7.49%
	Volkswagen	89,602	102,954	14.90%
(OLVO)	Volvo	13,445	15,866	18.01%
Total		1,234,932	1,321,437	7.00%

SOURCE: IDEAUTO





Registrations by vehicle type and source

		2017	2018	Change 17/18
	Domestic	111,738	87,361	-21.82
	Imported from EU	933,317	1,014,273	8.67
Passenger cars and 4-wheel drives	Imported NON-EU	189,877	219,803	15.76
	Total	1,234,932	1,321,437	7.00
	Domestic	34,605	46,793	35.22
	Imported from EU	51,495	45,617	-11.41
Derivatives, vans and pick ups	Imported NON-EU	36,142	38,811	7.38
	Total	122,242	131,221	7.35
	Domestic	11,419	12,389	8.49
	Imported from EU	9,479	8,739	-7.81
Light commercial vehicles <= 3.5 MT	Imported NON-EU	55,681	61,859	11.10
	Total	76,579	82,987	8.37
	Domestic	7,407	7,157	-3.38
	Imported from EU	16,368	15,831	-3.28
Industrial vehicles > 3.5 MT	Imported NON-EU	888	1,189	33.90
	Total	24,663	24,177	-1.97
	Domestic	541	444	-17.93
	Imported from EU	368	380	3.26
Microbuses	Imported NON-EU	71	71	0.00
	Total	980	895	-8.67
	Domestic	1,419	999	-29.60
	Imported from EU	1,280	1,606	25.47
Buses	Imported NON-EU	140	173	23.57
	Total	2,839	2,778	-2.15
Total		1,462,235	1,563,495	6.93

SOURCE: DGT (Spanish Traffic Authority)





LETTER FROM THE CHAIRMAN **BASIC FIGURES VEHICLE PRODUCTION VEHICLE VEHICLE** TURNOVER MILESTONES TRANSPARENCY PORTAL AND VICE CHAIRMAN REGISTRATIONS AND TAXATION OF THE SECTOR AND EXPORTS STOCK OF THE YEAR

4.2 REGISTRATIONS BY POWER SOURCE



Deliveries of alternative vehicles increased by 62% in 2018 compared to 2017, with 115,147 units registered. Hybrid was the most popular alternative technology in terms of registrations in 2018. There were 76,118 registrations of non-plug-in hybrid vehicles, while plug-in vehicles increased by 70% in 2018, with 5.683 deliveries.

Registrations of electric vehicles also increased, up by 59% with 7,833 deliveries; however, there were only 148 registrations of extended range electric vehicles (E-REV) in the year, 20% fewer than in 2017.

Registrations of gas-powered vehicles stood at 25,364 units in 2018, four-times the sales of 2017. LPG was the fastest growing technology, with a total of 19,663 vehicles delivered, while 5,403 CGN vehicles were registered, 128% more than in the previous year.

Registrations of alternative vehicles increased by 62% compared to 2017







// Vehicle registrations by type and power source

	2014	2015	2016	2017	2018	Change 17/18
Passenger cars and 4-wheel drives	855,308	1,034,232	1,147,009	1,234,932	1,321,437	7.00%
Petrol	275,045	360,967	459,171	570,008	739,531	29.74%
Diesel	565,477	650,093	651,617	597,006	473,477	-20.69%
Hybrid diesel	258	136	80	132	1,218	822.73%
Hybrid petrol	11,825	18,270	30,817	55,420	74,555	34.53%
Electric	974	1,342	2,005	3,920	5,982	52.60%
Electric e-REV	102	119	138	186	148	-20.43%
Plug-in hybrid diesel (PHEV)	31	16	32	63	48	-23.81%
Plug-in hybrid petrol (PHEV)	298	771	1,479	3,279	5,635	71.85%
Hydrogen	0	0	0	0	1	
LPG	1,130	2,256	1,321	3,688	17,088	363.34%
CNG	140	262	349	1,230	3,754	205.20%
LNG	28	0	0	0	0	
Light commercial	113,782	154,765	172,106	198,821	214,208	7.74%
Derivatives, vans and pick ups	75,733	101,068	110,066	122,242	131,221	7.35%
Petrol	954	4,217	6,921	10,709	15,620	45.86%
Diesel	74,143	95,855	102,026	109,515	110,459	0.86%
Electric	433	615	826	977	1,822	86.49%
LPG	153	314	207	778	2,569	230.21%
CNG	50	67	86	263	750	185.17%
LNG	0	0	0	0	1	
Commercial <= 3.5	38,049	53,697	62,040	76,579	82,987	8.37%
Petrol	16	37	24	28	41	46.43%
Diesel	37,999	53,596	61,903	76,411	82,779	8.33%
Electric	0	0	23	0	3	
LPG	0	0	0	0	1	
CNG	32	64	90	137	159	16.06%
LNG	2	0	0	3	4	33.33%
Industrial vehicles	18,190	25,209	28,220	28,482	27,842	-2.25%
Industrial > 3.5	16,214	22,431	24,699	24,663	24,177	-1.97%
Petrol	6	0	6	4	0	-100.00%
Diesel	16,169	22,373	24,354	24,154	23,457	-2.89%
Hybrid diesel	0	0	7	47	85	80.85%
Electric	0	0	2	3	4	33.33%
LPG	0	1	0	0	5	
CNG	33	53	288	426	333	-21.83%
LNG	6	4	42	29	293	910.34%
Microbuses and buses	1,976	2,778	3,521	3,819	3,665	-4.03%
Petrol	4	2	1	0	0	
Diesel	1,887	2,647	3,108	3,313	2,976	-10.17%
Hybrid diesel	31	62	142	172	260	51.16%
Electric	3	1	10	18	22	22.22%
Electric e-REV	5	1	0	0	0	
CNG	42	65	260	316	407	28.80%
LNG	4	0	0	0	0	
Total	987,280	1,214,206	1,347,335	1,462,235	1,563,487	6.92%











LETTER FROM THE CHAIRMAN **BASIC FIGURES VEHICLE PRODUCTION** VEHICLE VEHICLE TURNOVER **MILESTONES TRANSPARENCY** OF THE SECTOR AND EXPORTS REGISTRATIONS STOCK AND TAXATION PORTAL AND VICE CHAIRMAN OF THE YEAR

4.3 REGISTRATIONS IN EUROPE (by country and type)

		PASSENGER CARS			u	LIGHT COMMERCIAL			INDUSTRIAL, BUSES & COACHES		
		2017	2018	Change 17/18	2017	2018	Change 17/18	2017	2018	Change 17/18	
	Austria	353,320	341,068	-3.5%	40,174	43,641	8.6%	17,082	17,051	1.0%	
	Belgium	546,558	549,632	0.6%	76,397	77,936	2.0%	19,024	20,971	1.10%	
	Bulgaria	31,244	34,332	9.9%	5,973	6,282	5.2%	-	-		
	Croatia	50,412	59,856	18.7%	8,408	8,901	5.9%	2,599	2,673	1.03%	
€	Cyprus	13,080	12,956	-0.9%	2,029	1,815	-10.5%	-	-		
	Czech Rep.	271,595	261,437	-3.7%	19,398	20,225	4.3%	19,098	19,085	1.00%	
+	Denmark	221,838	218,565	-1.5%	35,895	33,859	-5.7%	10,430	10,150	0.97%	
	Estonia	24,494	25,387	3.6%	4,755	5,012	5.4%	2,240	2,220	0.99%	
-	Finland	118,587	120,499	1.6%	15,525	15,515	-0.1%	6,855	7,276	1.06%	
	France	2,110,748	2,173,481	3.0%	437,415	457,573	4.6%	102,089	110,212	1.08%	
	Germany	3,441,262	3,435,778	-0.2%	270,694	285,191	5.4%	163,199	167,861	1.03%	
#=	Greece	88,083	103,431	17.4%	6,627	6,905	4.2%	853	785	0.92%	
	Hungary	116,265	136,594	17.5%	19,942	22,728	14.0%	11,674	12,507	1.07%	
	Ireland	131,332	125,557	-4.4%	24,218	25,561	5.5%	4,486	4,400	0.98%	
	Italy	1,971,345	1,910,025	-3.1%	193,178	181,590	-6.0%	47,314	50,760	1.07%	
	Latvia	16,692	16,879	1.1%	2,242	2,393	6.7%	3,311	3,353	1.01%	
	Lithuania	25,867	32,447	25.4%	3,202	3,577	11.7%	14,250	17,164	1.20%	
	Luxembourg	52,775	52,811	0.1%	4,754	4,853	2.1%	2,354	2,134	0.91%	
	Netherlands	414,306	443,812	7.1%	73,471	79,171	7.8%	28,789	30,855	1.07%	
	Poland	486,352	531,889	9.4%	60,989	68,819	12.8%	55,264	60,002	1.09%	
0	Portugal	222,129	228,290	2.8%	38,523	39,282	2.0%	10,236	9,799	0.96%	
	Rumania	106,387	130,919	23.1%	16,021	17,585	9.8%	12,960	14,883	1.15%	
•	Slovakia	96,085	98,080	2.1%	7,581	9,126	20.4%	8,342	8,505	1.02%	
0	Slovenia	70,892	72,835	2.7%	12,107	12,709	5.0%	4,765	5,526	1.16%	
	Spain	1,234,932	1,321,438	7.0%	199,101	214,553	7.8%	48,861	47,297	0.97%	
+	Sweden	379,393	353,729	-6.8%	55,390	56,628	2.2%	14,251	13,938	0.98%	
	UK	2,540,617	2,367,147	-6.8%	362,149	357,325	-1.3%	103,639	98,341	0.95%	
EU15		13,827,225	13,745,263	-0.6%	1,833,511	1,879,583	2.5%	579,462	591,830	1.02%	
EU12		1,309,365	1,413,611	8.0%	162,647	179,172	10.2%	134,672	146,089	1.08%	
EFTA		493,965	465,612	-5.7%	69,692	71,508	2.6%	21,694	22,311	1.03%	
EU + E	FTA	15,630,555	15,624,486	-0.04%	2,065,850	2,130,263	3.1%	735,828	760,230	1.03%	
	+ EFTA	14,321,190	14,210,875	-0.8%	1,903,203	1,951,091	2.5%	601,156	614,141	1.02%	
#	lceland	21,287	17,967	-15.6%	2,025	1,918	-5.3%	769	786	1.02%	
#	Norway	158,650	147,929	-6.8%	35,838	37,204	3.8%	11,904	13,013	1.09%	
+	Switzerland	314,028	299,716	-4.6%	31,829	32,386	1.7%	9,021	8,512	0.94%	
	Total EU	15,136,590	15,158,874	0.1%	1,996,158	2,058,755	3.1%	714,134	737,919	1.03	

SOURCE: National Automobile Manufacturers' Associations















		INDUSTRIAL		IN	DUSTRIAL ≥16 M	T	BUSES	BUSES & COACHES >3.		
	2017	2018	Change 17/18	2017	2018	Change 17/18	2017	2018	Change 17/18	
Austria	8,186	8,204	0.2%	7,652	7,722	0.9%	1,244	1,125	-9.6%	
Belgium	9,818	10,816	10.2%	8,337	9,095	9.1%	869	1,060	22.0%	
Bulgaria	-	-		-	-		-	-		
Croatia	1,344	1,397	3.9%	1,051	1,052	0.1%	204	224	9.8%	
Cyprus	104	121	16.3%	65	50	-23.1%	-	-		
Czech Rep.	10,008	9,894	-1.1%	8,286	7,988	-3.6%	804	1,203	49.6%	
Denmark	5,029	4,998	-0.6%	4,545	4,574	0.6%	856	578	-32.5%	
Estonia	1,037	1,078	4.0%	991	1,005	1.4%	212	137	-35.4%	
Finland	3,473	3,897	12.2%	2,868	2,904	1.3%	514	475	-7.6%	
France	51,308	55,463	8.1%	44,452	48,519	9.1%	6,329	6,230	-1.6%	
Germany	91,755	94,404	2.9%	64,747	66,770	3.1%	6,697	6,687	-0.1%	
Greece	445	351	-21.1%	218	171	-21.6%	190	263	38.4%	
Hungary	5,854	6,258	6.9%	5,178	5,590	8.0%	642	659	2.6%	
Ireland	2,264	2,144	-5.3%	1,883	1,810	-3.9%	339	446	31.6%	
Italy Italy	24,347	25,582	5.1%	19,614	20,594	5.0%	3,353	4,584	36.7%	
Latvia	1,561	1,645	5.4%	1,505	1,582	5.1%	245	126	-48.6%	
Lithuania Lithuania	6,996	8,290	18.5%	6,862	8,178	19.2%	392	696	77.6%	
Luxembourg	1,138	1,032	-9.3%	977	885	-9.4%	239	217	-9.2%	
Netherlands	14,635	15,971	9.1%	13,267	14,322	8.0%	887	562	-36.6%	
Poland	27,659	29,870	8.0%	25,317	27,445	8.4%	2,288	2,687	17.4%	
Portugal	5,372	5,133	-4.4%	4,503	4,156	-7.7%	361	510	41.3%	
Rumania	6,108	6,903	13.0%	5,821	6,656	14.3%	1,031	1,324	28.4%	
Slovakia	4,190	4,308	2.8%	3,749	3,846	2.6%	403	351	-12.9%	
Slovenia	2,367	2,761	16.6%	2,215	2,578	16.4%	183	187	2.2%	
Spain Spain	24,675	24,178	-2.0%	20,659	19,792	-4.2%	3,527	3,327	-5.7%	
Sweden	6,752	6,802	0.7%	6,198	6,205	0.1%	1,301	931	-28.4%	
UK UK	54,648	52,468	-4.0%	40,649	38,470	-5.4%	8,342	7,403	-11.3%	
EU15	303,845	311,443	2.5%	240,569	245,989	2.3%	35,048	34,398	-1.9%	
EU12	67,228	72,525	7.9%	61,040	65,970	8.1%	6,404	7,594	18.6%	
EFTA	11,221	11,879	5.9%	8,415	8,616	2.4%	2,058	1,816	-11.8%	
EU + EFTA	382,294	395,847	3.5%	310,024	320,575	3.4%	43,510	43,808	0.7%	
EU15 + EFTA	315,066	323,322	2.6%	248,984	254,605	2.3%	37,106	36,214	-2.4%	
lceland	391	422	7.9%	222	255	14.9%	156	109	-30.1%	
H Norway	6,244	7,068	13.2%	4,470	4,919	10.0%	1,190	1,026	-13.8%	
Switzerland	4,586	4,389	-4.3%	3,723	3,442	-7.5%	712	681	-4.4%	
Total EU	371,073	383,968	3.5%	301,609	311,959	3.4%	41,452	41,992	1.3%	

SOURCE: National Automobile Manufacturers' Associations



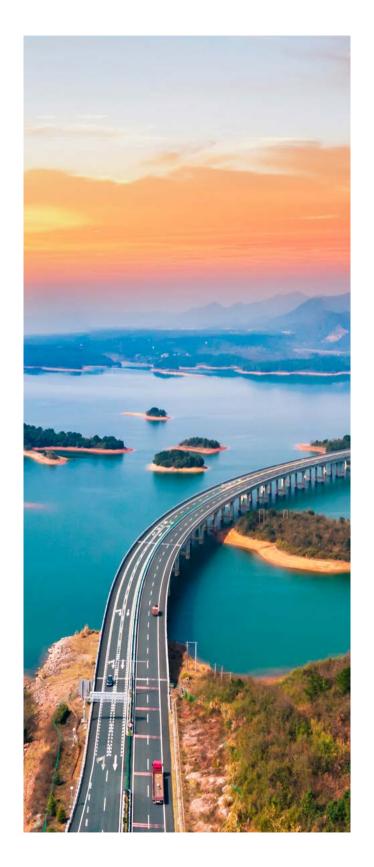




TOTALS AND CHANGE

		101	ALS AND CHA	NUL
		2017	2018	Change 17/18
	Austria	410,576	401,760	0.98%
	Belgium	641,979	648,539	1.01%
	Bulgaria	-	-	
	Croatia	61,419	71,430	1.16%
€	Cyprus	-	-	
	Czech Rep.	310,091	300,747	0.97%
+	Denmark	268,163	262,574	0.98%
	Estonia	31,489	32,619	1.04%
-	Finland	140,967	143,290	1.02%
	France	2,650,252	2,741,266	1.03%
	Germany	3,875,155	3,888,830	1.00%
t=	Greece	95,563	111,121	1.16%
	Hungary	147,881	171,829	1.16%
	Ireland	160,036	155,518	0.97%
	Italy	2,211,837	2,142,375	0.97%
	Latvia	22,245	22,625	1.02%
	Lithuania	43,319	53,188	1.23%
	Luxembourg	59,883	59,798	1.00%
	Netherlands	516,566	553,838	1.07%
	Poland	602,605	660,710	1.10%
0	Portugal	270,888	277,371	1.02%
_	Rumania	135,368	163,387	1.21%
•	Slovakia	112,008	115,711	1.03%
0	Slovenia	87,764	91,070	1.04%
	Spain	1,482,894	1,583,288	1.07%
+	Sweden	449,034	424,295	0.94%
	UK	3,006,405	2,822,813	0.94%
U15		16,240,198	16,216,676	1.00%
U12		1,606,684	1,738,872	1.08%
FTA		585,351	559,431	0.96%
U + EF1	ГА	18,432,233	18,514,979	1.00%
U15 +	EFTA	16,825,549	16,776,107	1.00%
#	lceland	24,081	20,671	0.86%
#=	Norway	206,392	198,146	0.96%
+	Switzerland	354,878	340,614	0.96%
0	Total EU	17,846,882	17,955,548	1.01%

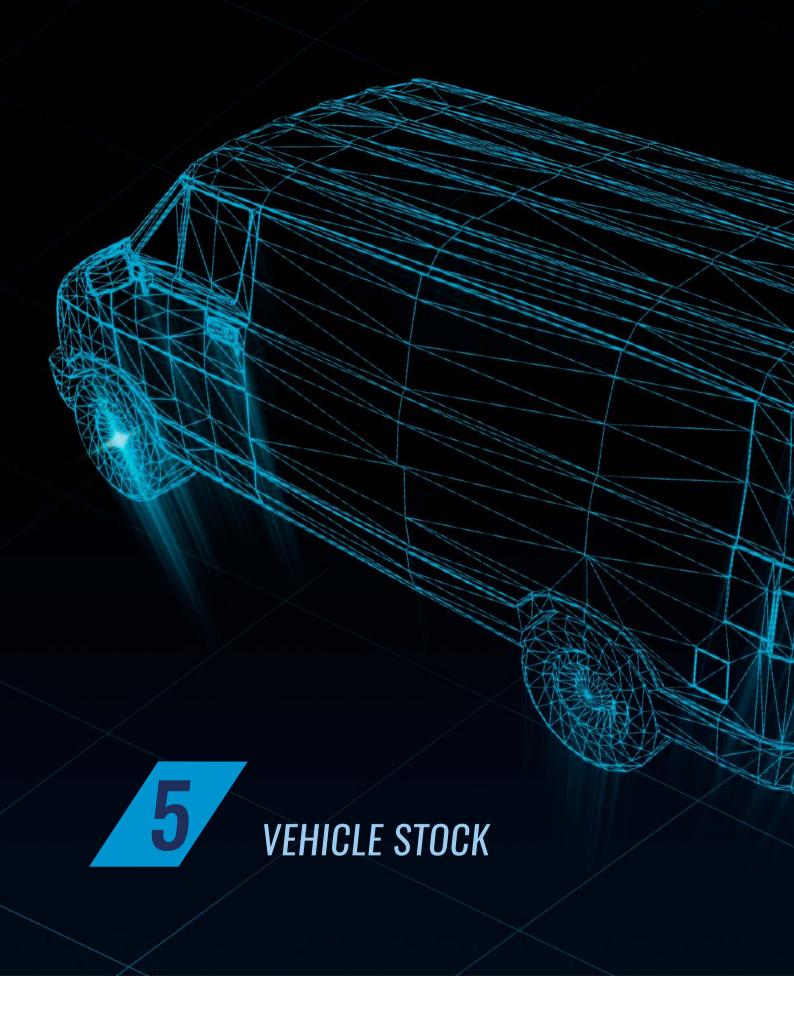












5.1 VEHICLE STOCK



In 2018, the average age of the vehicle stock increased to 12.4 years. This increase was mainly due to only 55% of vehicles being scrapped compared to new purchases, and an increase in purchases of second-hand vehicles. More than 166,000 vehicles over 20-years old were sold in the year. This is clearly highly detrimental to the environment and road safety. Against this backdrop, and with the lack of any aid for renewal of the vehicle stock, its average age will

continue to increase over the coming years, to at least 13 in 2022; it is expected to still be over 11 by 2030.

Spain has one of the oldest vehicle stocks in Europe. The average age of the vehicle stock is around 9 years in France, Germany, Austria, the UK and Ireland.

Average age of the stock of passenger cars (15-year trend and change 17/18)







LETTER FROM THE CHAIRMAN **BASIC FIGURES VEHICLE PRODUCTION** VEHICLE REGISTRATIONS MILESTONES TRANSPARENCY **VEHICLE** TURNOVER AND VICE CHAIRMAN OF THE SECTOR AND EXPORTS AND TAXATION PORTAL OF THE YEAR

// Domestic vehicle stock by type

		$\tilde{\mathcal{A}}$						4		
	PASSENGER	R CARS	COMMERCI	AL & IND.	BUSES & C	COACHES	TRACTO	RS IND.	TOTAL	*
	No. of vehicles	Change 17/18	No. of vehicles	Change 17/18	No. of vehicles	Change 17/18	No. of vehicles	Change 17/18	No. of vehicles	Change 17/18
2013	22,024,538	-1.0%	4,887,352	-2.0%	59,892	-2.0%	182,822	-2.2%	27,617,785	-1.2%
2014	22,029,512	0.0%	4,839,484	-1.0%	59,799	-0.2%	186,060	1.8%	27,590,727	-0.1%
2015	22,355,549	1.5%	4,851,518	0.2%	60,252	0.8%	195,657	5.2%	27,883,710	1.1%
2016	22,876,830	2.3%	4,879,480	0.6%	61,838	2.6%	207,889	6.3%	28,451,448	2.0%
2017	23,500,401	2.7%	4,924,476	0.9%	63,589	2.8%	218,154	4.9%	29,142,244	2.4%
2018	24,074,151	2.4%	4,980,911	1.1%	64,905	2.1%	225,942	3.6%	29,795,523	2.2%

^{*} Includes the other-vehicles item

SOURCE: DGT

Passenger cars per 1,000 people (and change 17/18)



// Percentage of vehicles over 10 years old

	PASSENGER CARS	LORRIES	BUSES	TRACTORS IND.
1997	37.6	34.2	46.0	25.5
1998	39.2	36.9	46.4	28.2
1999	40.3	39.3	47.2	30.1
2000	40.3	41.0	47.5	29.8
2001	39.9	42.1	48.2	28.7
2002	40.3	43.3	48.5	26.8
2003	39.4	42.4	46.2	22.9
2004	38.5	41.6	43.9	21.0
2005	36.7	40.3	42.5	20.5
2006	35.8	39.4	42.1	20.1
2007	35.7	39.2	42.0	20.6

9	40.3	39.3	47.2	30.1	2010	42.0	47.2	45.3	29.2
0	40.3	41.0	47.5	29.8	2011	45.3	50.2	46.2	32.4
1	39.9	42.1	48.2	28.7	2012	48.2	53.2	47.3	35.1
12	40.3	43.3	48.5	26.8	2013	50.9	56.7	48.7	37.7
13	39.4	42.4	46.2	22.9	2014	54.1	60.7	51.1	40.1
14	38.5	41.6	43.9	21.0	2015	57.1	65.0	53.2	41.7
15	36.7	40.3	42.5	20.5	2016	59.7	69.3	54.5	43.3
16	35.8	39.4	42.1	20.1	2017	61.7	73.0	55.8	45.4
17	35.7	39.2	42.0	20.6	2018	61.6	73.2	56.6	45.6
					·		·	·	

2008

2009

PASSENGER CARS

37.5

39.6

LORRIES

41.1

44.3

BUSES

42.5

44.4

TRACTORS IND.

22.2

25.7

SOURCE: DGT





Domestic electric vehicle stock by type

	PASSENGER CARS		COMMERCIAL & INDUSTRIAL		BUSES & COACHES		TOTAL*	
	No. of vehicles	% change to previous year	No. of vehicles	% change to previous year	No. of vehicles	% change to previous year	No. of vehicles	% change to previous year
2014	2,835	9.6	1,377	32.4	71	-25.3	11,261	8.7
2015	4,893	72.6	1,978	43.6	91	28.2	14,246	26.5
2016	8,042	64.4	2,967	50.0	137	50.5	19,037	33.6
2017	14,842	84.6	3,970	33.8	175	27.7	27,689	45.4
2018	26,890	81.2	6,731	69.5	155	-11.4	54,209	95.8

SOURCE: DGT. Electric vehicles include: battery electric (BEV), extended range electric (E-REV) and plug-in hybrid (PHEV).

Domestic non-plug-in hybrid vehicle stock by type

	PASSENGER CARS		COMMERCIAL & INDUSTRIAL		BUSES & COACHES		TOTAL*	
	No. of vehicles	% change to previous year	No. of vehicles	% change to previous year	No. of vehicles	% change to previous year	No. of vehicles	% change to previous year
2014	55,608	16.3	173	4.2	4		55,827	16.3
2015	62,778	12.9	212	22.5	29	625.0	63,082	13.0
2016	110,088	75.4	396	86.8	145	400.0	110,757	75.6
2017	164,222	49.2	499	26.0	307	111.7	165,271	49.2
2018	238,329	45.1	800	60.3	488	59.0	240,008	45.2

SOURCE: DGT.

Domestic gas-powered vehicle stock by type

	PASSENGER CARS		COMMERCIAL & INDUSTRIAL		BUSES & COACHES		TOTAL*	
	No. of vehicles	% change to previous year	No. of vehicles	% change to previous year	No. of vehicles	% change to previous year	No. of vehicles	% change to previous year
2014	2,132	127.5	486	-12.9	176	37.5	2,878	73.4
2015	5,017	135.3	918	88.9	256	45.5	6,290	118.6
2016	6,868	36.9	1,558	69.7	532	107.8	9,111	44.8
2017	12,315	79.3	2,966	90.4	853	60.3	16,341	79.4
2018	36,836	199.1	7,866	165.2	2,494	192.4	47,522	190.8

SOURCE: DGT. Gas-powered vehicles include: liquified petroleum gas, compressed natural gas and liquified natural gas.

^{*} Includes the other-vehicles item.

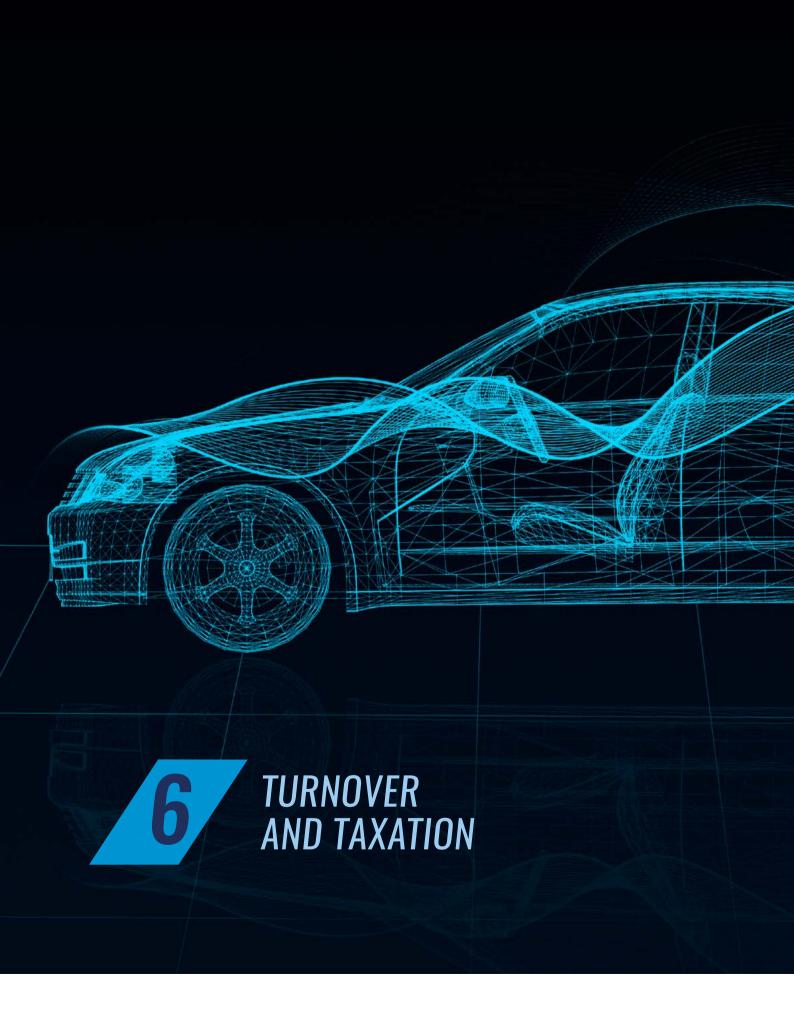






^{*} Includes the other-vehicles item.

 $^{^{\}star}$ Includes the other-vehicles item.





6.1 TURNOVER, INVESTMENT AND TAXATION



In 2018, the manufacturers and associated companies in ANFAC turned over 66,550 million euros, 3% more than their revenue in the previous year. However, net profits fell by over 50%, mainly as a result of incremental investment efforts.

These companies invested around 3,000 million euros in Spain in 2018, 42% more than the previous year. Over the last five years, automotive manufacturers have been investing over 2,000 million euros per year in their facilities in Spain. This increase reflects their commitment to our country and the transformation to the mobility of the future.

The tax take from the automotive sector as a whole in 2018 amounted to around 30,000 million euros, 6% more than the

previous year; in other words, **2,000 million euros more in a year**, with no aid plans or stimuli for vehicle purchases. The strength of the automotive market also brings the country wealth in the form of tax collections. Revenues from purchases of new vehicles increased by 10.5%, exceeding the rise in registrations, which saw an increase in sales of 7.7%.

Investment exceeded 3,000 million euros in 2018, up 42%







Collections of automotive taxes and charges in 2018







2,000

MILLION EUROS MORE IN ONE YEAR WITHOUT AID PLANS OR STIMULI FOR VEHICLE PURCHASES.

Collections of automotive taxes and charges (Thousand euros)

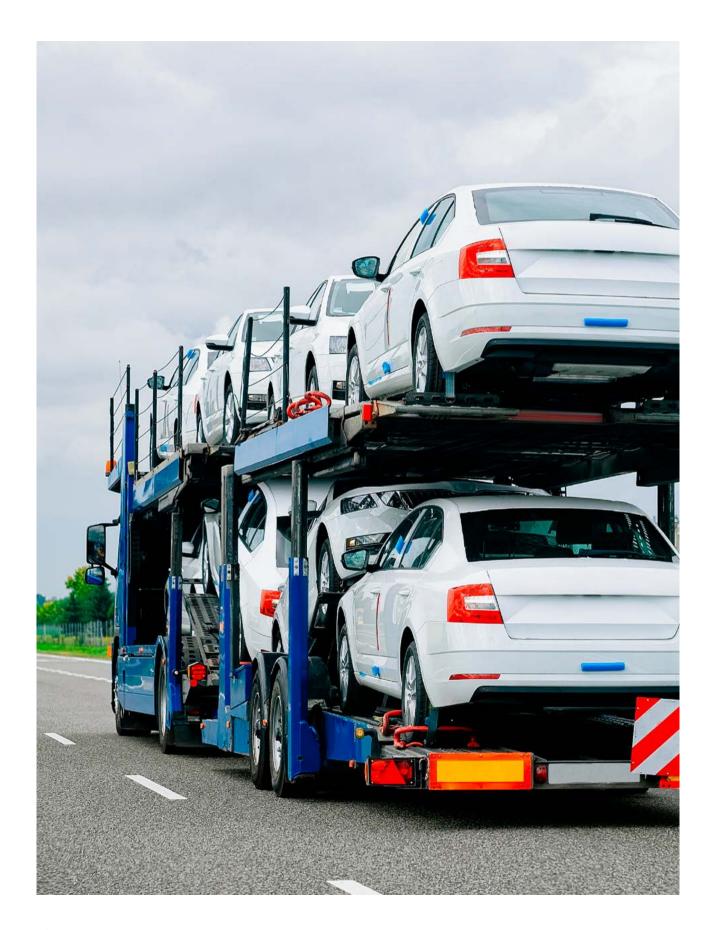
	2017	FY 17/16	2018	FY 18/17
Revenue from acquisition of new vehicles	4,809,017	10.2%	5,312,918	10.5%
VAT ¹	4,467,317	9.5%	4,856,562	8.7%
Registration tax ²	341,700	19.7%	456,356	33.6%
Fuel consumption ³	19,729,001	5.2%	20,813,089	5.5%
VAT	6,624,648	10.6%	7,360,559	11.1%
Special tax on certain means of transport	13,104,353	2.6%	13,452,530	2.7%
Road tax	2,872,099	1.8%	2,905,562	1.2%
For transfers of second-hand vehicles	469,091	12.3%	523,727	11.6%
Asset transfer tax	284,419	11.9%	317,247	11.5%
VAT	136,154	12.4%	149,400	9.7%
Registration tax⁴	48,518	14.5%	57,080	17.6%
Registration tax	141,544	9.7%	152,910	8.0%
Vehicle licence tax	57,549	-10.6%	71,236	23.8%
Change of ownership tax	181,410	10.6%	194,522	7.2%
Total	28,259,710	5.8%	29,973,964	6.1%

- 1 In house: Average AEAT (Tax Agency) prices resulting from DGT registration and Registration Tax
- 2 Source: Tax Agency. New vehicle tax collection
- 3 Based on consumption, price and tax data from CORES and the Industry Ministry
- 4 Source: Tax Agency. Second-hand vehicle tax collection





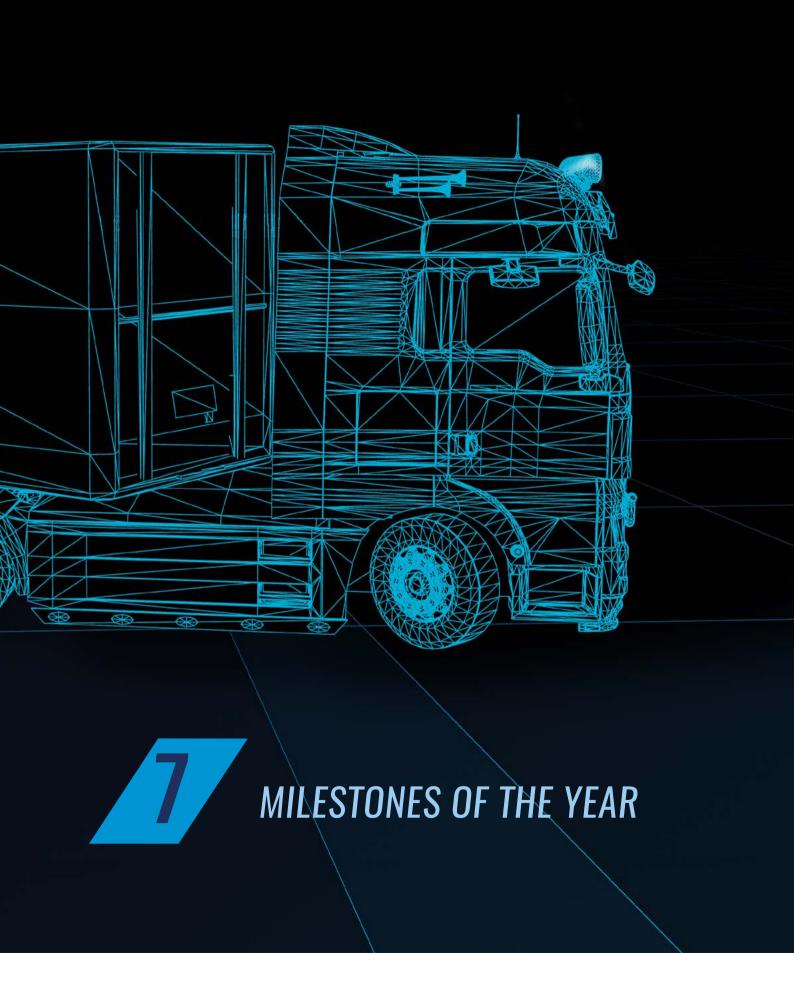














// 7.1 MILESTONES OF THE YEAR



2018 was a difficult year for the automotive industry, against a changing and challenging backdrop. The entry of technology into vehicle production and marketing has resulted in the appearance of four major trends (vehicle electrification, connectivity, autonomous driving and shared mobility), which are shifting the industry's paradigm.

2018 also saw the approval of more demanding environmental regulations and mobility policies in Spanish councils,

restricting driving in low-emission zones and during anti-pollution periods. In addition, potential prohibitions on diesel and petrol engines have also impacted the market, causing uncertainty among consumers, who have preferred to wait rather than buying a vehicle.

ANFAC, as an Association representing vehicle manufacturers and companies in Spain, has been working with many political and

institutional agents and stakeholders to pursue an orderly, fair and profitable transition towards the mobility of the future, which has to be smart, efficient, accessible and affordable for the public. We are fully committed to the decarbonisation of the vehicle stock, and improving road safety and the competitiveness of our factories. In 2018, our work was based on fostering this smart transition.

This year, ANFAC has been working towards an orderly, fair and profitable transition towards the mobility of the future







// Industrial

ANFAC has been working on the competitiveness of the industry in our country, with the clear priorities of logistics costs, energy, and improving employment flexibility and productivity.

Hand-over contracts

In 2018, ANFAC fostered the approval of the **Hand-over contract (Contrato de relevo)**, an essential tool for maintaining employment and rejuvenating the workforce of the automobile industry.

At the end of the year, Congress approved the Royal Decree on Urgent Measures to Foster the Economic Competitiveness of Industry and Commerce, which included the new regulation on Hand-over contracts. This type of contract is of crucial importance for our sector; it has been used by manufacturers in the past, helping to sustain over 4,000 jobs during the economic crisis. This measure fosters the foundations of employment and the rejuvenation of the workforce in our factories, which in many cases is excessively old. Therefore, our Association welcomed this measure, as it fosters the competitiveness of our factories, enables the protection of quality jobs and provides access to the industry for young people under very favourable conditions.

Agreement with ADIF and meetings with port authorities

Logistical costs need to be addressed to consolidate Spain as a global factory, to facilitate the distribution of its exclusively-produced vehicles worldwide - to over 130 countries - and the receipt of components on a global scale. This is also important to meet transport demand for the internal distribution of vehicles in a domestic market that needs to be consolidated. In this regard, and given the difficulties of furthering regulatory changes that increase transport capacity and reduce port fees, ANFAC has been working intensively with ADIF, renewing our partnership agreement to improve the efficiency of rail transport, with specific progress on increasing the length of trains and reducing costs. We have also fostered meetings with the most strategic port authorities for the automotive industry, to improve specific aspects that affect the efficiency of transit through ports.

We have renewed our cooperation agreement with ADIF to improve the efficiency of rail transport



Mario Armero at the Senate's Industry Commission







Public-private partnership

Strategic Automotive Council

In October 2018, ANFAC took part in the first meeting of what will be the Strategic Automotive Council for Sustainable and Efficient Mobility and Adaptation of the Spanish Automotive Industry to New Challenges. This debating forum was opened by the Ministry of Industry and Ecological Transition. ANFAC participated in the meeting, putting the challenges facing the automotive industry firmly on the agenda of the public authorities, in order to keep the leading position of the Spanish industry in Europe and worldwide on the path towards zero- and low-emission mobility. This is a very important step for maintaining the competitiveness of Spanish factories and their chances of being awarded new models.

The **Strategic Automotive Council** also established some **areas of work** to meet all mobility needs. These included: the creation of a **Sustainable Mobility Board** between the industrial sector and the government; a **review of the taxation** associated with the automotive sector; **fostering investment** in the automotive sector in Spain by manufacturers to attract more sustainable models; and coordination between the sector and the government to define \mathbf{CO}_2 reduction targets.

One of ANFAC's objectives is to improve the competitiveness of automotive factories in Spain

The Clean Air Platform

In 2018, the 10th Clean Air Platform - of which ANFAC is a founding member - signed a framework agreement with FEMP to raise awareness of air quality in our urban centres. This agreement reflects the shared objective of both parties to foster the sustainable development of our cities. Arancha García, vice-president of the Clean Air Platform and director of ANFAC's Industrial and Environmental area, signed the agreement with the mayor of Valladolid and the president of the Spanish Network of Healthy Cities, Óscar Puente Santiago. ANFAC believes that being part of this platform and signing the agreement with FEMP are an important step forward in the commitment of automotive manufacturers to improving air quality in our urban environments.



Presentation of the Sector Agenda of the Automotive Industry to the Economics Councillor of Castilla y Leon, Pilar del Olmo.









Formation of the Electric and Alternative Vehicles Committee.

Environment and energy

The environment was one of the key areas of the Association's work in 2018, particularly with the approval of new measurement regulations for CO_2 emissions and pollutants in Europe and other regulations in Spain. ANFAC is fully committed to de-carbonising Spain's vehicle stock. However, it is seeking a transition that maintains and fosters the competitiveness of our manufacturers, whilst promoting a strong market that justifies Spain winning contracts for new electric and alternative vehicles.

ANFAC's negotiations in the European Union

2018 was a busy year for the development of European automotive regulations, particularly with regard to the environment and safety. The European Commission's mobility packages discussed **significant regulations** relating to reducing CO_2 emissions in both passenger cars and light commercial vehicles, and, for the first time, **heavy vehicles**, establishing very ambitious objectives for 2025-2030.

It has also completed its regulations on the measurement of pollutant emissions under real driving conditions (Real Driving Emissions), which feature a number of significant aspects, such as the new requirements for in-service conformity. Aspects of security have also become more important, with the development of a new framework for the introduction of new advanced security systems in new vehicles. ANFAC was very active in the development of these in both the European Council and the Parliament, having taken

part in numerous meetings in preparation for the discussions of Council members, and with Spanish Euro MPs.

Creation of the VEA Committee

ANFAC is firmly committed to smart mobility and low- and zero-emission vehicles. In April 2018 it set up a steering committee dedicated specifically to electric and alternative vehicles. The main objective of this committee was to develop proposals to foster various aspects of electric and alternative mobility, taking a comprehensive view of the whole issue. The Committee is advocating the: instigation of a structural incentives plan; the installation of public charging points and the linking of electricity, gas and fuel batteries; appropriate planning of rapid charging infrastructure at the national level; establishment of favourable taxation for these vehicles; and greater legislative consistency at the local, autonomous community and national levels.

The VEA committee is specifically dedicated to electric and alternative vehicles, to foster their growth in Spain from an overall perspective









Elimination of the charging manager

The removal of the charging manager (gestor de carga) was included in a Royal Decree Law in October 2018, on Urgent measures for the energy transition and the protection of consumers. ANFAC has been advocating the removal of this role for years, as it makes the installation of charging points more difficult, adding a further barrier to the already complicated development of electric mobility in Spain.

ANFAC believes that the removal of the charging manager is a significant step, as this will facilitate the roll out of recharging infrastructure for electric vehicles, thus promoting the shared objective of developing zero- and low-emission mobility.

The new WLTP regulatory framework

One of the main milestones that ANFAC worked on in 2018 was the implementation of the **new WLTP regulatory framework**, which puts in place new requirements for the **measurement of** $\mathbf{CO_2} \ \mathbf{emissions} \ \mathbf{and} \ \mathbf{fuel} \ \mathbf{consumption} \ \mathbf{by} \ \mathbf{light} \ \mathbf{vehicles}. \ \mathbf{This} \ \mathbf{new} \ \mathbf{framework} \ \mathbf{replaces} \ \mathbf{the} \ \mathbf{previous} \ \mathbf{NEDC} \ \mathbf{procedure}, \ \mathbf{with} \ \mathbf{the} \ \mathbf{main} \ \mathbf{objective} \ \mathbf{of} \ \mathbf{providing} \ \mathbf{more} \ \mathbf{realistic} \ \mathbf{information} \ \mathbf{on} \ \mathbf{fuel} \ \mathbf{consumption} \ \mathbf{and} \ \mathbf{CO_2} \ \mathbf{emissions} \ \mathbf{for} \ \mathbf{consumers}, \ \mathbf{and} \ \mathbf{to} \ \mathbf{establish} \ \mathbf{a} \ \mathbf{global} \ \mathbf{framework} \ \mathbf{for} \ \mathbf{vehicle} \ \mathbf{testing}, \ \mathbf{fostering} \ \mathbf{international} \ \mathbf{harmonisation} \ \mathbf{of} \ \mathbf{testing} \ \mathbf{requirements}.$

The Industry Ministry responded favourably to our request for a transition period between the previous regulations and the new WLTP

The new WLTP procedure produces two types of data: direct fuel consumption and CO_2 emission values, which are much higher than those under the NEDC cycle; and values benchmarked against the NEDC cycle for compliance with the CO_2 emission reduction targets set for 2020-2021. Considering the impact the direct use of WLTP values could have on car registration tax, our Association requested and argued for a transition period from the previous NEDC emissions measurement regulations to the new WLTP regulations, using correlated factors to facilitate a more orderly transition. The Industry Ministry approved this, setting a transition period to 31 December 2020.

This is in line with the European framework and the policies of other neighbouring countries. Countries with taxation linked directly to CO₂ emissions are approving similar initiatives to reduce the direct impact of the WLTP, as far as possible. This is the case in Austria, the Czech Republic, Sweden and Belgium, which will use this correlation mechanism in 2019 and 2020.

This orderly transition is particularly important - in the eyes of our Association - because the increased taxation resulting from the WLTP would be particularly negative for vehicles manufactured in Spain, which account for 24% of all registrations. These vehicles belong to smaller segments that are more sensitive to price rises. As they would be moved to a higher tax bracket as a result of the WLTP, and would therefore increase in price, they would cease to be affordable for the average consumer, with the resulting impact on the renewal of the vehicle stock.







The Balearic Islands Climate Change and Energy Transition Act

In 2018, the government of the Balearic Islands announced a **Draft Climate Change Act** that was clearly discriminatory against internal-combustion vehicles. ANFAC believed that this represented (and still represents) an assault on the freedom of movement of people, goods and services, one of the cornerstones of EU legislation. The regulation, which is now approved as Law, **prohibited the driving of passenger cars with diesel engines from 2025, and other diesel, petrol, gas and hybrid vehicles from 2035**. However, the Act did permit vehicles powered by such fuels to continue being driven until the end of their useful lives, if they were registered before these dates.

Vehicle manufacturers are signed up to compliance with the most demanding environmental standards - set by the European Union - to reduce CO₂ emissions and pollutants. However,

ANFAC is convinced that this Act is highly discriminatory and not a positive development, even for achieving the objectives it claims to be pursuing.

It is not ideal for the environment, the economy or society, which are the three pillars on which such regulations should be based. This prohibition also, presumably, breaches: the European motor vehicle accreditation framework; procedures relating to technical regulations; and even the Treaty on the Functioning of the European Union, by seriously interfering in the normal operation of the single market.

We are therefore committed to pushing for the transition towards the mobility of the future to be more orderly, with a policy free of prohibitions but pursuing a positive strategy. ANFAC has reported the draft Balearic Islands Climate Change and Energy Transition Act to the European Commission and the Single Market Council, which reports to the Ministry of the Economy and Business.



Meeting with the Minister for Agriculture, Fisheries, Food and the Environment, Isabel García Tejerina









Arancha García receives the "Woman and Traffic management" award

// Aid and taxation

Taxation plan

ANFAC worked throughout the year on the updating of the taxation affecting the automotive industry. The objective is to integrate the old taxes on vehicles into **a single tax** with a more modern design and concept. It is also focused exclusively on use, approaching the environmental problem from both sides: air quality (emission of pollutants) and de-carbonisation (greenhouse gas effects). This new concept of the tax **aims to foster the renewal of our vehicle stock**, through scrappage and replacement of older vehicles. This is the most pressing problem from the environmental and safety perspectives in Spain at present.

New vehicles are the answer to environmental concerns, and taxation should be consistent with the objective of vehicle renewal. Green taxes on vehicle use **discriminate against the most polluting vehicles** compared to those with the lowest emissions, fostering the presence of the latter.

This new taxation will also help with the technological transition towards zero- and low emission vehicles, providing that the tax is on usage not on purchases, and is based on technological neutrality, encouraging the best available technology from the environmental perspective. All of the technologies have a role to play, and we cannot dismiss any of

them at present. They can all contribute to the major challenges of decarbonising transport and improving air quality.

ANFAC is also working for approval of a lower VAT rate for alternative vehicles in the next Directive to modify this European tax. This support for lower VAT on alternative vehicles would give a very significant initial push to the mass incorporation of such models into the vehicle pool. Alternative vehicles are currently more expensive than conventional vehicles: initiatives are therefore required to enable them to compete on price and increase their market share.

Regionalisation. Contacts with the autonomous communities for the launch of MOVES plans

There was no active aid plan for alternative vehicles in 2018, following expiry of the last Movalt, the funds for which ended at the end of the previous year. However, ANFAC began work with the autonomous communities in 2018 to drive the MOVES programme forward, once its regional restructuring had been announced. From late 2018 and continuing in 2019, ANFAC has been working intensively to promote these programmes being as consistent as possible, achieving the maximum possible media interest to ensure their greatest success, once the advertising effect of a national plan had been lost.







// People

The technological revolution and industry 4.0 also require - in the automotive sector, as elsewhere - specific profiles that cover the needs for the design and manufacture of new models and their communication with people and infrastructure. ANFAC is therefore working to enhance the adequacy of the professional profiles of the industry of the future.

Training

The Ministry of the Economy, Industry and Competitiveness (under the PP government) asked us to identify training actions for inclusion in the Automotive 4.0 training programme, without following the traditional route of joint committees, where our training actions were mixed with those for the metals sector. This was the first time that there would be specific modules for our sector.

On 26 May 2018, the Official State Gazette published the Resolution of 11 May 2018, from the Public Employment Service, approving a tenderfor the award of public grants for the acquisition and improvement of professional competencies relating to technological changes and the digital transformation. This is aimed mainly at people in work, and includes six actions aimed exclusively at the automotive sector, for both manufacturing and distribution:

- » Digital marketing & e-commerce for automotion.
- » Industry 4.0 for the automotive sector.
- » Automotive managers 4.0: strategy and knowledge for the digital transformation.
- » Production and maintenance of electric and hybrid vehicles.
- » **Transformation of logistics** in an industry 4.0 environment.
- » Investigation and reconstruction of traffic accidents.



Ciudadanos' President, Albert Rivera, visits the PSA plant in Zaragoza









Presentation of The Car Lab at the IE business school

The Car Lab

ANFAC is well aware of the major changes that the automotive industry will go through in the very near future. That is why it is leading the creation and commissioning of "The Car Lab", a pioneering executive training programme designed to meet the needs of the automotive sector against a backdrop of digital transformation.

Working with the main associations in the automotive sector Faconauto (concessionaires) and Ganvam (garages and dealers) a strategic agreement was reached in 2018 with the IE University to launch this training programme to meet the challenges of digitalisation, zero and low emissions, and progressive automation of processes, including driving. This is essential training for the executives who will be driving the change towards a new model.

The first round of this training was held in October last year, with the attendees rating it as 4.6 out of 5 overall.

The **second round** of the training is planned for **2019**.

Honda joins ANFAC

Honda Motor Europe joined ANFAC as an associate in October last year. This reflects the brand's strategy to increase its presence in continental Europe at a time of rapid and significant changes in the industry, particularly with regard to mobility, sustainability and competitiveness. Honda's membership is very important, as it increases the weight of the European industry among ANFAC's associates, even if Honda has no direct manufacturing in Spain

Honda's membership reflects its strategy of increasing its involvement in continental Europe







// Mobility

Participation in discussion and working forums on mobility

In 2018, ANFAC increased its involvement in forums and working bodies related to mobility in the widest sense. In this regard, ANFAC is a member of the monitoring board of Madrid Central, the regional board for electric vehicles in the Madrid region, the Taula anti-air pollution body, the Catalonia mobility pact, Barcelona's city hall's Car Sharing working group and the electric mobility board for the Valencia region. Membership of these forums has enabled ANFAC to work more directly on standardising mobility policies at the local and regional levels.

We have also been taking part in public discussion forums, such as the Global Annual Energy Meeting, the IESE 33 Auto, CONAMA 2018 (on the panel with Ecologists in Action), conferences at INSIA (Instituto Universitario de Investigación del Automóvil - the University Institute for Automotive Research) and other events, putting forward our message that industrial competitiveness, modernisation of the vehicle stock and fostering electric and alternative vehicles are the key objectives for our Association.

Guide to the new "Fuel labelling for road vehicles"

ANFAC was involved in the preparation of the guidance for the new "Fuel labelling for road vehicles", which came into effect on 12 October 2018. This initiative involves the implementation of a new, single, harmonised set of fuel labels for the 28 members of the European Union, the EEA countries (Iceland, Liechtenstein and Norway) and Macedonia, Serbia, Switzerland and Turkey, in order to help consumers choose the most suitable fuel for their vehicle.

Labels are a **visual tool that helps consumers** check that they have chosen the most suitable fuel for their vehicles. The new labels standardise fuel names throughout the EU, thus improving information for consumers about their vehicles, whether it is their own or one they are driving within the EU, without needing to understand the language.

Our approach focuses on industrial competitiveness, renewal of our vehicle stock and tax stimuli

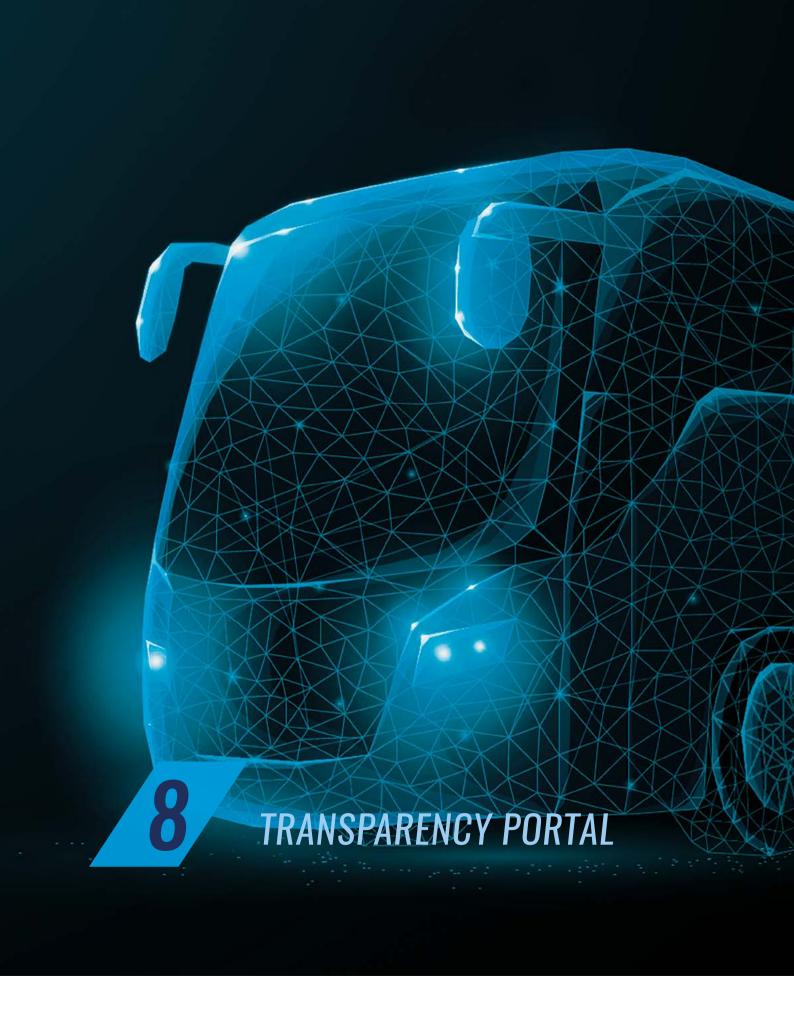


Mario Armero at the 4th Nissan Forum











// 8.1 TRANSPARENCY PORTAL



ANFAC is a not-for-profit association that was founded in 1977. Its main objective is to promote the development of the automotive sector, contributing to the general interests of the country.

The Association is responsible for collective representation and management of the common interests of manufacturers of vehicles and their derivatives, engines and components, and their brands, with government bodies, entities and public and private institutions.

ANFAC draws on its prior experience and knowledge of the sector to offer its associate members the tools they need to research, examine, disseminate and promote regulatory proposals relating

to technical, business and social issues, fostering harmonious progress among all of the economic agents involved.

Working in tandem with its associates, all of ANFAC's activities and actions are guided by integrity, transparency and equality of access, the principles that define the Association.

ANFAC was constituted under Act 19/1977, of 1 April, on the regulation of the right to union association. As such, it is governed by its own bylaws, and is fully autonomous and independent, while subject to legal regulations. It is also registered with the European Union's voluntary Transparency Register, with ID number 814112514572-47.





// Management board



José Vicente de los Mozos CHAIRMAN OF ANFAC Chairman of the Board of Directors of RENAULT ESPAÑA.



Mario Armero
EXECUTIVE VICE CHAIRMAN
OF ANFAC

MEMBERS



Manuel TerrobaExecutive Chairman of BMW IBÉRICA (Since 06-01-2019).



Guenther SeemannExecutive Chairman of BMW IBÉRICA (Until 05-31-2019).



Alberto de AzaChief Executive Officer of
FIAT CHRYSLER AUTOMOBILES SPAIN
(since 12-01-2018).



Víctor Sarasola
Chief Executive Officer of
FIAT CHRYSLER AUTOMOBILES SPAIN
(Until 11-30-2018).



Luca ParasaccoChief Executive Officer of FIAT CHRYSLER AUTOMOBILES SPAIN (Until 07-10-2018).

B

(KIA)



Jesús Alonso Chairman and CEO of FORD ESPAÑA.



Leopoldo Satrústegui General Manager of HYUNDAI MOTOR ESPAÑA.



Jaime Revilla
Chairman and CEO of IVECO ESPAÑA S.L.



Eduardo Dívar General Manager of KIA MOTORS ESPAÑA (Since 05-21-2018).



Emilio Herrera
General Manager of
KIA MOTORS ESPAÑA
(Until 05-20-2018).



Ford

IVECO









José Luis López-Shümmer General representative of DAIMLER for

BASIC FIGURES

OF THE SECTOR



Jaime Gorbeña Chairman of MITSUBISHI and BERGÉ Y CIA.





Genís Alonso CEO of NISSAN MOTOR IBÉRICA (Since 09-01-2018).



Alan Johnson CEO of NISSAN MOTOR IBÉRICA (Since 09-01-2018).





Juan Antonio Muñoz Codina CEO and General Manager OPEL ESPAÑA (Since 01-01-2019).



PSA

S

Antonio Cobo CEO and General Manager OPEL ESPAÑA (Until 12-31-2018).





Christophe Mandon Commercial Director of **GROUPE PSA for Spain and Portugal**



Pérez Botello Chairman of the Executive Committee of VOLKSWAGEN GROUP España Distribución.

Francisco



(9)

 \leq



Miguel Carsi Chairman and CEO of TOYOTA ESPAÑA (Since 12-2018).



Agustín Martín Chairman and CEO of TOYOTA ESPAÑA (Since 12-2018).



Luca de Meo Chairman of the Executive Committee of SEAT and Chairman of the Board of Directors of VOLKSWAGEN GROUP España Distribución (Since 05-2018).



D. Fco. Javier García Sanz Chairman of the Executive Committee of SEAT and Chairman of the Board of Directors of VOLKSWAGEN GROUP España Distribución (Until 05-2018)





// Internal organisation



Mr. José Vicente de los Mozos Chairman of Anfac



Mr. Mario Armero Executive Vice Chairman



Mr. Jaime Moreno OPERATIONS DIRECTOR



Mr. Diego Carril HEAD OF LEGAL AND EMPLOYMENT



Mrs. Arancha García Director of Industry And the Environment



Mrs. Aránzazu Mur Head of Economics And Logistics



Mrs. Noemi Navas Communications Director





Associate companies





BMW IBÉRICA. S.A.

Marca: BMW, MINI Types of vehicles produced or sold: Passenger cars, 4-wheel drives Avda. de Burgos, 118, 28050 Madrid Tel: 913350505

www.bmw.es www.mini.es



DAF VEHÍCULOS INDUSTRIALES. S.A.U.

Marca: DAF

Types of vehicles produced or sold: Lorries Parque Empresarial San Fernando Edificio Francia, escalera B - Planta 1^a, 28830 San Fernando de Henares, Madrid Tel: 916600255

www.daf.eu/es









FIAT CHRYSLER AUTOMOBILES SPAIN, S.A.

Marca: ALFA ROMEO, FIAT, FIAT PROFESSIONAL ABARTH, JEEP Types of vehicles produced or sold: Passenger cars and 4-wheel drives, light commercial vehicles and vans. Carretera M-300, km 28,500 28802 Alcalá de Henares. Madrid Tel: 918853700

www.fiat.es



FORD ESPAÑA, S.L.

Make: FORD

Types of vehicles produced or sold: Passenger cars and 4-wheel drives, light commercial vehicles and vans. Caléndula, 13. Edificio Miniparc IV. 28109. Alcobendas, Madrid Tel: 917145100

www.ford.es



HONDA ESPAÑA

Make: HONDA Types of vehicles produced or sold: Passenger cars and 4-wheel drives

Carrera del Mar del Nord 1. Pol. Ind. La Torre del Rector, 08130 Santa Perpètua de Mogoda, Barcelona

Tel: 933708007 www.honda.es



HYUNDAI MOTOR ESPAÑA. S.L.U.

Make: HYUNDAI

Types of vehicles produced or sold: Passenger cars, 4-wheel drives and light commercial vehicles C/Quintanapalla 2, Edificio Néctar,

28050 Madrid Tel: 913605260 www.hyundai.es



INFINITI ESPAÑA, S.A.

Make: INFINITI Types of vehicles produced or sold: Passenger cars and 4-wheel drives C/Alcalá 65, 28014 Madrid Tel: 915238707 www.infiniti.es

IVECO

IVECO ESPAÑA. S.L.

Make: IVECO

Types of vehicles produced or sold: Vans, light and heavy industrial vehicles. tractors, busses coaches and microbuses. Avda. de Aragón 402, 28022 Madrid Tel: 913251000

www.iveco.com





JAGUAR LAND ROVER ESPAÑA. S.L.U.

Make: LAND ROVER, JAGUAR Types of vehicles produced or sold: Passenger cars and 4-wheel drives Plaza de Pablo Ruiz Picasso 1, pl 42. Torre Picasso, 28020 Madrid Tel: 915786100

www.landrover.es www.jaguar.es



KIA MOTORS IBERIA, S.L.

Make: KIA

Types of vehicles produced or sold: Passenger cars and 4-wheel drives C/Anabel Segura 16, Edificio Vega Norte 2, 28108, Alcobendas, Madrid Tel: 915796466 www.kia.es



MAN TRUCK & BUS IBERIA, S.A.U.

Make: MAN

Types of vehicles produced or sold: vans, lorries and buses Avda. De la Cañada 52. 28823. Coslada, Madrid Tel: 916602000

www.mantruckandbus.es



MAZDA AUTOMÓVILES ESPAÑA, S.A.

Make: MAZDA

Types of vehicles produced or sold: Passenger cars and 4-wheel drives C/Manuel Pombo Angulo 28. 28050 Madrid Tel: 914185480 www.mazda.es





MERCEDES-BENZ ESPAÑA. S.A.

Make: MERCEDES-BENZ, SMART Types of vehicles produced or sold: Passenger cars, 4-wheel drives, vans, light and heavy industrial vehicles, tractors, busses, coaches and microbuses. Avda. de Bruselas 30 - Arroyo de la Vega 28108, Alcobendas, Madrid Tel: 914846000



MITSUBISHI ESPAÑA. S.A.

www.mercedes-benz.es

Make: MITSUBISHI Types of vehicles produced or sold: Passenger cars and 4-wheel drives C/Alcalá 65, 28014 Madrid Tel: 913877400

www.mitsubishi-motors.es



NISSAN MOTOR IBERICA. S.A.

Make: NISSAN

Types of vehicles produced or sold: Passenger cars and 4-wheel drives, light commercial vehicles, vans. light and heavy industrial vehicles Sector B, Calle 3, no. 77-111 - Edificio La Masía,

Pol. Industrial Zona Franca - 08040 Barcelona NISSAN IBERIA:

Avenida de la Gran Vía de L'Hospitalet 149-151. 08908, L'Hospitalet de Llobregat, Barcelona Tel: 932908080

www.nissan.es















BASIC FIGURES

OF THE SECTOR

PSA GROUPE

Make: CITROËN, PEUGEOT, DS AUTOMOBILES, OPEL. VAUXHALL

Types of vehicles produced or sold: Passenger cars and 4-wheel drives, light commercial vehicles, vans and microbuses Eduardo Barreiros 110, 28041 Madrid Tel: 915851100 - 913471000

www.citroen.es www.peugeot.es www.dsautomobiles.es www.opel.es groupe-psa.es

Vigo centre: Avda. Citroën 3 y 5, 36210, Vigo, Pontevedra Tel: 986215000 e-mail: centrodevigo@mpsa.com https://site.groupe-psa.com/vigo/es/

Madrid centre: Eduardo Barreiros 110, 28041 Madrid Tel 913472000 e-mail: centrodemadrid@mpsa.com

https://site.groupe-psa.com/madrid/es/

Zaragoza centre

Polígono de Entrerríos. 50639, Figueruelas, Zaragoza, Tel: 976658902

https://site.groupe-psa.com/espana/es/ groupe-psa-espana/centros-de-produccion/



OPEL ESPAÑA, S.L.U.

Make: OPEL

Types of vehicles produced or sold: Passenger cars and 4-wheel drives, light commercial vehicles and vans Pol. Entrerríos, 50639, Figueruelas, Zaragoza Tel: 976658902

https://site.groupe-psa.com/espana/es/ groupe-psa-espana/centros-de-produccion/



PORSCHE IBÉRICA. S.A.

Make: PORSCHE Types of vehicles produced or sold: Passenger cars and 4-wheel drives Avda. Burgos 87, 28050 Madrid Tel: 912035600 www.porsche.com



RENAULT ESPAÑA. S.A.

Make: RENAULT, DACIA Types of vehicles produced or sold: Passenger cars and 4-wheel drives, light commercial vehicles and vans Parque Empresarial Avenida de Europa. Avenida de Europa no. 1, 28108, Alcobendas, Madrid Tel: 913742200

www.renault.es



SCANIA HISPANIA, S.A.

Make: SCANIA

Type of vehicles produced or sold: Lorries

Avda. Castilla 29, Pol. Ind. San Fernando I, 28830. San Fernando de Henares. Madrid Tel: 916788000

www.scania.es



SEAT, S.A.

Make: SEAT

Types of vehicles produced or sold: Passenger cars and 4-wheel drives Autovía A II - km 585, 08760. Martorell, Barcelona Tel: 937085000

www.seat.es



SSANGYONG ESPAÑA. S.A.

Make: SSANGYONG Types of vehicles produced or sold: Passenger cars and 4-wheel drives C/Alcalá 65, 28014 Madrid Tel: 911510585 www.ssangyong.es



SUBARU ESPAÑA, S.A.

Make: SUBARU Types of vehicles produced or sold: Passenger cars and 4-wheel drives C/Alcalá 65, 28014 Madrid Tel: 913692890 www.subaru.es



TOYOTA ESPAÑA, S.L.U,

Make: TOYOTA, LEXUS Types of vehicles produced or sold: Passenger cars and 4-wheel drives Avda. de Bruselas 22, 28108. Alcobendas, Madrid Tel: 911513300

www.tovota.es www.lexusauto.es



VOLKSWAGEN NAVARRA, S.A.

Make: VOLKSWAGEN Types of vehicles produced or sold: Passenger cars Polígono de Landaben s/n, 31012. Pamplona, Navarra Tel: 948424104 www.volkswagen.es







VOLKSWAGEN GROUP ESPAÑA DISTRIBUCIÓN

Make: VOLKSWAGEN, AUDI, SKODA Types of vehicles produced or sold: Passenger cars and 4-wheel drives, light commercial vehicles, vans, light industrial vehicles Parque de Negocios Mas Blau II, C/de la Selva 22, 08820, El Prat de Llobregat, Barcelona Tel: 934028967 www.volkswagen.es www.audi.es





www.skoda.es

VOLVO GROUP ESPAÑA

(RENAULT TRUCKS SPAIN AND VOLVO TRUCKS ESPAÑA) Make: RENAULT, VOLVO Types of vehicles produced or sold: Lorries C/Basaur 7-9, 28023 Madrid Tel: 913727800 www.renault-trucks.es www.volvotrucks.es







LETTER FROM THE CHAIRMAN **BASIC FIGURES VEHICLE PRODUCTION VEHICLE VEHICLE** TURNOVER MILESTONES TRANSPARENCY PORTAL AND VICE CHAIRMAN OF THE SECTOR REGISTRATIONS AND EXPORTS AND TAXATION STOCK OF THE YEAR

// ANFAC member organisations

ANFAC member organisations	Associations and entities in which ANFAC is involved	International associations in which ANFAC is involved	
Instituto de Estudios de Automoción:	Asociación Española para el Tratamiento Medioambiental de los Vehículos Fuera de Uso:	Association de Constructeurs Europeenes d'Automobiles:	
deauto	SIGRAUTO	ACEA	
Asociación Nacional de Fabricantes de Carrocerías de Autobuses:	Asociación Española de Normalización y Certificación:	Organization Internationale des Constructeurs d'Automobiles:	
Lascabus	AENOR	@ OICA	

// Instituto de Estudios de Automoción (IEA)



The IEA sets benchmark metrics for the Spanish automotive market, which provide a reference point for all public and private **operators in the sector**. It uses these metrics to offer its customers solutions to meet their analytic needs at all times.

It covers both the new and second-hand markets, bringing together all available information to provide adequate information to parties involved in the automotive sector: brands, dealers, consultants, rental companies, hirers, financiers, etc.

Its main solutions are:

Highly detailed analysis for monitoring performance of the dealer network, assessing the objectives defined and helping to identify areas for study to identify future plans for developing the make.

- Monitoring the performance of the market to analyse the performance of makes compared to their competitors.
- **Tools** that enable analysis of different scenarios "what would happen if...", presenting the results as a report or map.
- Analysis of the vehicle stock
- After-sales analysis
- Market forecasts
- Consultancy







