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Industry Report

Wholesale and retail trade and
repair of motor vehicles and
motorcycles
2016
ROMANIA

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I. KEY INDICATORS

- The Wholesale and retail trade and repair of motor vehicles and motorcycles industry in Romania was represented by 19,025 companies at the end of 2016, compared to 17,946 in the previous year and 16,936 in 2014.
- The industry's net profit amounted to RON 1,221,986,735 in 2016.
- The industry's total revenue was RON 40,854,468,899 in 2016, up by 12.35% compared to the previous year.
- The combined costs of the companies in the Wholesale and retail trade and repair of motor vehicles and motorcycles industry reached RON 39,353,954,754 in 2016, up by 11.23% year-on-year.
- The industry's total revenue makes up 4.38% to the country's Gross domestic product (GDP) in 2016, compared to 4.22% for 2015 and 3.76% in 2014.
- A total of 85,659 people were employed in the Wholesale and retail trade and repair of motor vehicles and motorcycles industry in 2016, compared to 83,702 in 2015 and 80,631 in 2014.
- Most of the companies in the industry are based in Bucharest, followed by Cluj and Ilfov.

II. INTRODUCTION

In 2016 the companies in the Wholesale and retail trade and repair of motor vehicles and motorcycles industry numbered 19,025, distributed in 6 sectors.

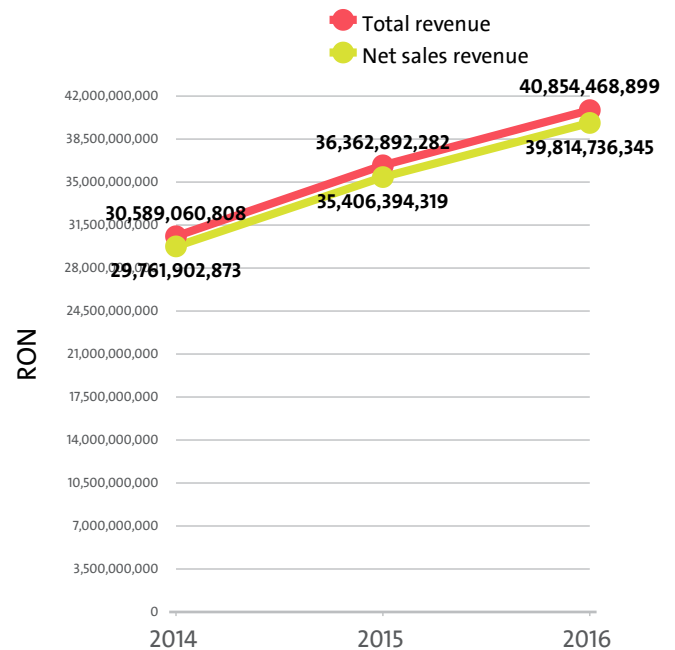
In 2015 there were a total of 17,946 companies operating in the industry. In 2014 their number totalled 16,936.

NUMBER OF COMPANIES IN WHOLESALE AND RETAIL TRADE AND REPAIR OF MOTOR VEHICLES AND MOTORCYCLES INDUSTRY BY SECTORS

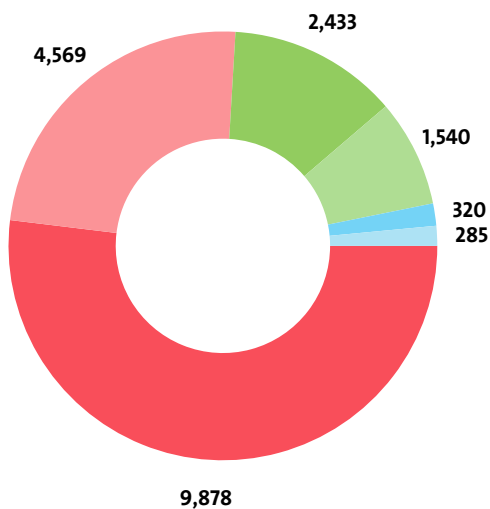
SECTOR	2016	2015	2014
MAINTENANCE AND REPAIR OF MOTOR VEHICLES	9,878	9,264	8,669
RETAIL TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES	4,569	4,335	4,111
WHOLESALE TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES	2,433	2,403	2,315
SALE OF CARS AND LIGHT MOTOR VEHICLES	1,540	1,356	1,300
SALE OF OTHER MOTOR VEHICLES	320	311	278
SALE, MAINTENANCE AND REPAIR OF MOTORCYCLES AND RELATED PARTS AND ACCESSORIES	285	277	263

III. REVENUES

The total revenue in the industry was RON 40,854,468,899 in 2016, RON 36,362,892,282 in 2015 and 30,589,060,808 in 2014.



INDUSTRY STRUCTURE BY SECTORS AND NUMBER OF COMPANIES

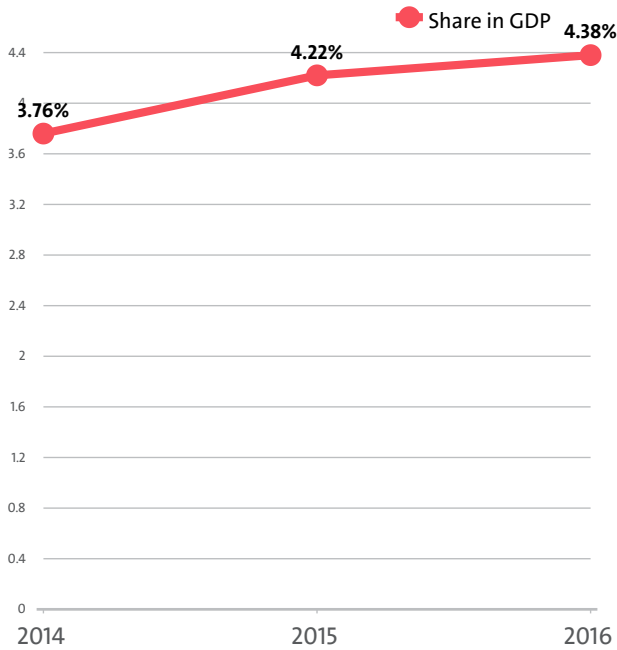


- Maintenance and repair of motor vehicles
- Retail trade of motor vehicle parts and accessories
- Wholesale trade of motor vehicle parts and accessories
- Sale of cars and light motor vehicles
- Sale of other motor vehicles
- Others

The companies in the Wholesale and retail trade and repair of motor vehicles and motorcycles market of Romania earned combined net sales revenues of RON 39,814,736,345 in 2016.

In annual terms, sales marked an increase of 12.45% compared to 2015. In comparison to 2014 they increased by 33.78%. In 2015 sales rose by 18.97% year-on-year.

The Wholesale and retail trade and repair of motor vehicles and motorcycles industry total revenue make up 4.38% to the country's GDP in 2016, compared to 4.22% for 2015 and 3.76% in 2014.

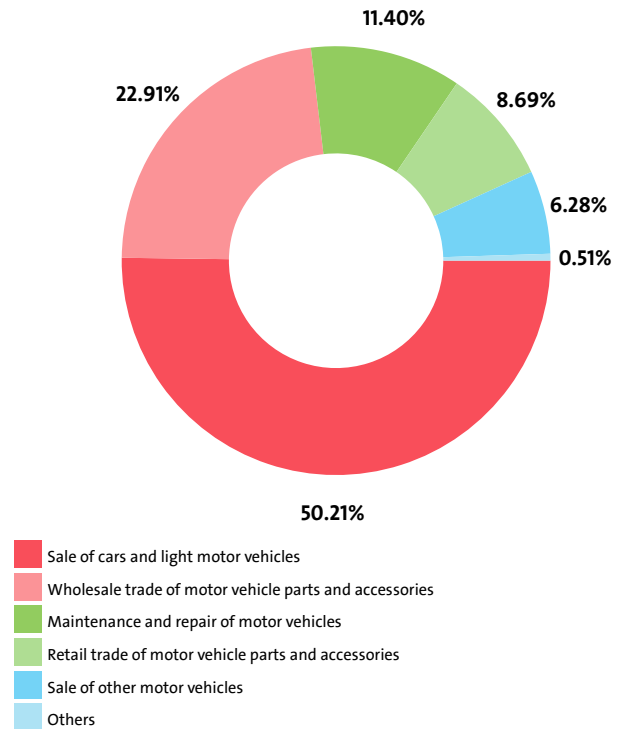


We expect, based on the trend in the last three years, the total revenue of the Wholesale and retail trade and repair of motor vehicles and motorcycles industry to change at a compound annual growth rate (CAGR) of 15.57% in 2017.

NET SALES REVENUE BY SECTORS

RANK	SECTOR	NET SALES REVENUE (RON)
1	SALE OF CARS AND LIGHT MOTOR VEHICLES	19,990,490,158
2	WHOLESALE TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES	9,121,157,930
3	MAINTENANCE AND REPAIR OF MOTOR VEHICLES	4,540,547,468
4	RETAIL TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES	3,459,329,172
5	SALE OF OTHER MOTOR VEHICLES	2,500,775,981
6	SALE, MAINTENANCE AND REPAIR OF MOTORCYCLES AND RELATED PARTS AND ACCESSORIES	202,435,636

INDUSTRY'S NET SALES REVENUE STRUCTURE BY SECTORS



The highest growth, of 23.17%, was recorded by Sale, maintenance and repair of motorcycles and related parts and accessories, while Sale of other motor vehicles registered the sharpest decline, of 0.53%.

TOP COMPANIES' REVENUE BY SECTORS

SEGMENT	COMPANY	TOTAL REVENUE (RON)	NET SALES REVENUE (RON)
SALE OF OTHER MOTOR VEHICLES			
	IVECO TRUCK SERVICES SRL	463,329,477	461,428,527
	IVECO ROMANIA SRL	436,938,323	403,508,276
	MHS TRUCK & BUS SRL	355,942,673	343,388,096
SALE OF CARS AND LIGHT MOTOR VEHICLES			
	RENAULT COMMERCIAL ROUMANIE SRL (FORMERLY KNOWN AS RENAULT NISSAN ROMANIA SRL)	2,565,585,142	2,557,908,036
	PORSCHE ROMANIA SRL	2,505,946,791	2,467,034,397
	MERCEDES-BENZ ROMANIA SRL	1,971,077,967	1,960,554,808
WHOLESALE TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES			
	AUTONET IMPORT SRL	1,192,740,741	1,177,271,461
	AD AUTO TOTAL SRL	780,990,362	746,301,238
	AUGSBURG INTERNATIONAL IMPEX SRL	485,986,178	479,725,768
RETAIL TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES			
	MARSOROM SRL	84,587,700	83,495,632
	DELTCOM OE SRL	64,707,150	63,901,731
	EURO PARTS DISTRIBUTION SRL	44,696,147	42,162,850
MAINTENANCE AND REPAIR OF MOTOR VEHICLES			
	ATP MOTORS RO SRL	139,401,437	129,426,747
	AUTOMOTIVE INVESTMENT CORPORATION SRL	99,003,690	76,633,091
	MHS TRUCK SERVICE SRL	79,199,045	77,658,205
SALE, MAINTENANCE AND REPAIR OF MOTORCYCLES AND RELATED PARTS AND ACCESSORIES			
	MOTOBOOM SRL	21,442,313	21,154,426
	DATA4SHOPS SRL	19,025,737	18,697,347
	AUTHENTIC SPIRIT SRL	18,471,548	18,226,479

The top 10 companies in terms of total revenue in Wholesale and retail trade and repair of motor vehicles and motorcycles accounted for 32.04% of the industry's total in 2016, 29.87% in 2015 and 28.97% in 2014.

TOP 10 COMPANIES BY TOTAL AND NET SALES REVENUE IN THE INDUSTRY

RANK	COMPANY	TOTAL REVENUE (RON)	NET SALE REVENUE (RON)
1	RENAULT COMMERCIAL ROUMANIE SRL (FORMERLY KNOWN AS RENAULT NISSAN ROMANIA SRL)	2,565,585,142	2,557,908,036
2	PORSCHE ROMANIA SRL	2,505,946,791	2,467,034,397
3	MERCEDES-BENZ ROMANIA SRL	1,971,077,967	1,960,554,808
4	TIRIAC AUTO SRL	1,207,058,404	1,201,315,679
5	AUTONET IMPORT SRL	1,192,740,741	1,177,271,461
6	PORSCHE INTER AUTO ROMANIA SRL	950,824,092	948,102,478
7	TOYOTA ROMANIA SRL	869,215,141	859,878,326
8	AD AUTO TOTAL SRL	780,990,362	746,301,238
9	AUTOMOBILE BAVARIA SRL	559,129,490	550,792,185
10	AUGSBURG INTERNATIONAL IMPEX SRL	485,986,178	479,725,768

The total revenues of the top 10 companies in the Wholesale and retail trade and repair of motor vehicles and motorcycles were 1.4% of GDP in 2016, compared to 1.26% for 2015 and 1.09% in 2014.

The top 10 by assets in the Wholesale and retail trade and repair of motor vehicles and motorcycles sector made up RON 11,635,127,816, or 29.22% of the total net sales revenue.

TOP 10 BY TOTAL ASSETS IN THE INDUSTRY

RANK	COMPANY	RON
1	RENAULT COMMERCIAL ROUMANIE SRL (FORMERLY KNOWN AS RENAULT NISSAN ROMANIA SRL)	658,877,233
2	AUTONET IMPORT SRL	637,546,897
3	PORSCHE ROMANIA SRL	568,031,588
4	MERCEDES-BENZ ROMANIA SRL	442,755,976
5	AD AUTO TOTAL SRL	407,158,592
6	TIRIAC AUTO SRL	401,129,283
7	AUTOMOBILE BAVARIA SRL	322,696,377
8	AUTO ITALIA IMPEX SRL	274,120,956
9	TRUST MOTORS SRL	221,029,509
10	EVW HOLDING SRL	219,218,767

TOP 10 COMPANIES BY TOTAL REVENUE IN THE FIELD SALE OF OTHER MOTOR VEHICLES WERE:

COMPANY	RON
IVECO TRUCK SERVICES SRL	463,329,477
IVECO ROMANIA SRL	436,938,323
MHS TRUCK & BUS SRL	355,942,673
EVW HOLDING SRL	274,875,709
VOLVO ROMANIA SRL	245,366,181
EUROSPEED SRL	136,830,483
BRIARI'S IND SA	127,906,225
CTE TRAILERS SRL	104,227,601
MUNAX SRL	51,671,086
ANADOLU AUTOMOBIL ROM SRL	39,933,257

The 10 largest companies in terms of total revenue in sector Wholesale and retail trade and repair of motor vehicles and motorcycles earned total revenue of RON 2,237,021,015 and accounted for 5.48% of the industry's total revenue.

TOP 10 COMPANIES BY TOTAL REVENUE IN THE FIELD SALE OF CARS AND LIGHT MOTOR VEHICLES WERE:

COMPANY	RON
RENAULT COMMERCIAL ROUMANIE SRL (FORMERLY KNOWN AS RENAULT NISSAN ROMANIA SRL)	2,565,585,142
PORSCHE ROMANIA SRL	2,505,946,791
MERCEDES-BENZ ROMANIA SRL	1,971,077,967
TIRIAC AUTO SRL	1,207,058,404
PORSCHE INTER AUTO ROMANIA SRL	950,824,092
TOYOTA ROMANIA SRL	869,215,141
AUTOMOBILE BAVARIA SRL	559,129,490
AUTOKLASS CENTER SRL	446,699,447
AUTO ITALIA IMPEX SRL	369,897,387
TRUST MOTORS SRL	360,189,111

The 10 largest companies in terms of total revenue in sector Wholesale and retail trade and repair of motor vehicles and motorcycles earned total revenue of RON 11,805,622,972 and accounted for 28.90% of the industry's total revenue.

TOP 10 COMPANIES BY TOTAL REVENUE IN THE SECTOR WHOLESALE TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES WERE:

COMPANY	RON
AUTONET IMPORT SRL	1,192,740,741
AD AUTO TOTAL SRL	780,990,362
AUGSBURG INTERNATIONAL IMPEX SRL	485,986,178
GOODYEAR DUNLOP TIRES ROMANIA SRL	326,942,661
UNIX AUTO SRL	284,395,049
DINAMIC 92 DISTRIBUTION SRL	246,391,732
CONEX DISTRIBUTION SA	214,025,498
ELIT ROMANIA PIESE AUTO ORIGINALE SRL	211,095,776
BARDI AUTO SRL	172,191,920
ATP - EXODUS SRL	168,449,006

The 10 largest companies in terms of total revenue in sector Wholesale and retail trade and repair of motor vehicles and motorcycles earned total revenue of RON 4,083,208,923 and accounted for 9.99% of the industry's total revenue.

TOP 10 COMPANIES BY TOTAL REVENUE IN THE MARKET RETAIL TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES WERE:

COMPANY	RON
MARSOROM SRL	84,587,700
DELTICOM OE SRL	64,707,150
EURO PARTS DISTRIBUTION SRL	44,696,147
VERBITA SRL	32,814,140
IPORO COM SRL	27,373,140
MIXAJ COM SRL	26,018,274
AUTO TRANS COM SRL	25,355,024
PIESE AUTO LOGISTIC SRL	23,424,158
TIRES AND PARTS SRL	22,817,178
NORAUTO ROM SERVICES SRL	22,032,393

The 10 largest companies in terms of total revenue in sector Wholesale and retail trade and repair of motor vehicles and motorcycles earned total revenue of RON 373,825,304 and accounted for 0.92% of the industry's total revenue.

TOP 10 COMPANIES BY TOTAL REVENUE IN THE INDUSTRY MAINTENANCE AND REPAIR OF MOTOR VEHICLES WERE:

COMPANY	RON
ATP MOTORS RO SRL	139,401,437
AUTOMOTIVE INVESTMENT CORPORATION SRL	99,003,690
MHS TRUCK SERVICE SRL	79,199,045
EXCLUSIV AUTO ENB SRL	61,944,244
CASA AUTO SEBES SRL	48,499,711
TERMOPORT SRL	37,816,577
GERMAN TOP TRADING SRL	37,634,364
IRMEX SA	34,189,942
RADBURG SOFT SERVICE SRL	31,872,692
AUTOVEST SRL	28,438,055

The 10 largest companies in terms of total revenue in sector Wholesale and retail trade and repair of motor vehicles and motorcycles earned total revenue of RON 597,999,757 and accounted for 1.46% of the industry's total revenue.

TOP 10 COMPANIES BY TOTAL REVENUE IN THE SECTOR SALE, MAINTENANCE AND REPAIR OF MOTORCYCLES AND RELATED PARTS AND ACCESSORIES WERE:

COMPANY	RON
MOTOBOOM SRL	21,442,313
DATA4SHOPS SRL	19,025,737
AUTHENTIC SPIRIT SRL	18,471,548
RIVIERA BIKE SRL	17,127,858
ASP GROUP EAST SRL	8,884,512
MOTODYNAMICS SRL	8,472,504
AUTOMOTIVE TRADING SERVICES SRL	7,980,927
UNITED MOTORS INTERNATIONAL SRL	6,007,097
MOTO MUS DESIGN SRL	5,037,082
DUAL TOURS SRL	4,063,011

The 10 largest companies in terms of total revenue in sector Wholesale and retail trade and repair of motor vehicles and motorcycles earned total revenue of RON 116,512,589 and accounted for 0.29% of the industry's total revenue.

IV. EXPENSES

The combined costs of the companies in the Wholesale and retail trade and repair of motor vehicles and motorcycles industry reached RON 39,353,954,754 in 2016.

In annual terms, total expenses grew by 11.23% compared to 2015 and grew by 31.24% in comparison to 2014.

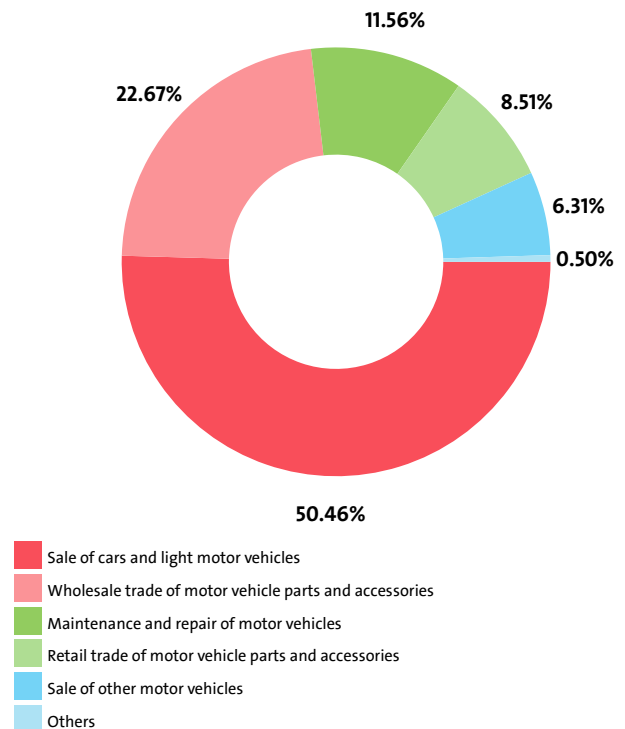
We expect, based on the trend in the last three years, the total costs of the Wholesale and retail trade and repair of motor vehicles and motorcycles industry to change at a compound annual growth rate (CAGR) of 14.56% in 2017.

TOTAL COSTS BY SECTORS

RANK	SECTOR	TOTAL COSTS (RON)
1	SALE OF CARS AND LIGHT MOTOR VEHICLES	19,856,921,433
2	WHOLESALE TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES	8,921,898,657
3	MAINTENANCE AND REPAIR OF MOTOR VEHICLES	4,548,214,443
4	RETAIL TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES	3,347,298,074

5	SALE OF OTHER MOTOR VEHICLES	2,484,478,626
6	SALE, MAINTENANCE AND REPAIR OF MOTORCYCLES AND RELATED PARTS AND ACCESSORIES	195,143,521

INDUSTRY'S TOTAL COSTS STRUCTURE BY SECTORS



Sale of cars and light motor vehicles marked the highest annual increase in total expenses, of 18.21%, while total expenses dropped the most, by 2.01%, for Sale of other motor vehicles.

The biggest spenders in the industry, with costs of over 10% of industry's costs, numbered 20, including UNIX AUTO SRL, AUTONET IMPORT SRL, AUGSBURG INTERNATIONAL IMPEX SRL, IVECO ROMANIA SRL, MHS TRUCK & BUS SRL. The medium spenders, or those in the 5% and 10% range count 21 and include MATEROM SRL, ATP MOTORS RO SRL, RMB INTER AUTO SRL, DINAMIC 92 DISTRIBUTION SRL, MIDOCAR SRL. Below 5% threshold are 18,984 companies, including FLORADINI AUTO SRL, DANY TAD SRL, SERVICE ACUMULATOR SRL, ALBA MOTOR SRL, SIMPRES SRL.

Employment expenses in the Wholesale and retail trade and repair of motor vehicles and motorcycles industry rose by 14.97% on the year to RON 2,643,691,184 in 2016.

The highest growth in labour costs, of 21.33%, was registered by Retail trade of motor vehicle parts and accessories, while Sale of other motor vehicles marked the sharpest fall, of 11.22%.

The monthly costs per employee in the Wholesale and retail trade and repair of motor vehicles and motorcycles industry averaged RON 2,572 in 2016, RON 2,289 in 2015 and RON 2,089 in 2014.

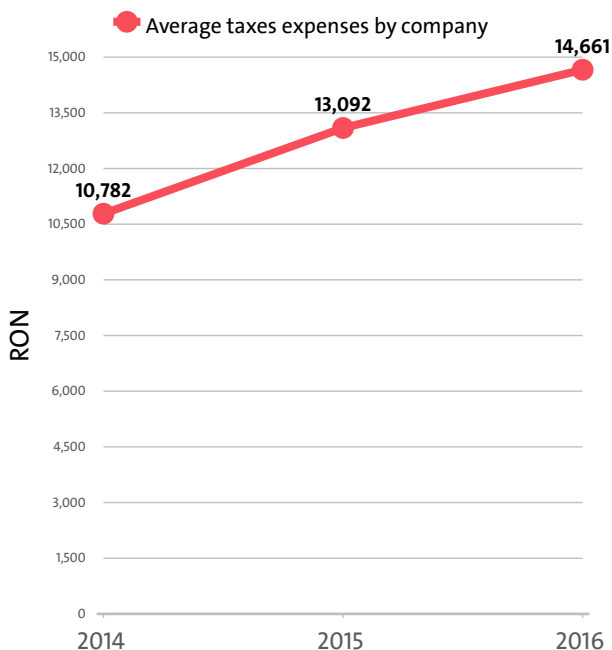
EMPLOYMENT EXPENSES IN WHOLESALE AND RETAIL TRADE AND REPAIR OF MOTOR VEHICLES AND MOTORCYCLES BY SECTORS IN 2016

RANK	SECTOR	EMPLOYMENT EXPENSES (RON)	AVERAGE EXPENSES PER EMPLOYEE (RON)
1	MAINTENANCE AND REPAIR OF MOTOR VEHICLES	797,475,630	21,055
2	SALE OF CARS AND LIGHT MOTOR VEHICLES	742,882,067	50,949
3	WHOLESALE TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES	654,624,328	39,853
4	RETAIL TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES	311,878,748	21,805
5	SALE OF OTHER MOTOR VEHICLES	125,286,391	64,348
6	SALE, MAINTENANCE AND REPAIR OF MOTORCYCLES AND RELATED PARTS AND ACCESSORIES	11,544,020	21,905

THE TOP 10 COMPANIES BY AVERAGE MONTHLY COSTS PER EMPLOYEE IN THE INDUSTRY

RANK	COMPANY	RON
1	UNION MOTORS ROMANIA SRL	147,087
2	DELTICOM OE SRL	37,262
3	ANDRA-HOUSE INVESTMENT SRL	36,264
4	BRIDGESTONE ROMANIA SRL	25,799
5	GENIUS CARS SRL	20,749
6	IHLE ANVELOPE SRL	17,467
7	WEBASTO ROMANIA TRADING SRL	16,662
8	O & G PARTNER'S TRADE SRL	14,901
9	GOODYEAR DUNLOP TIRES ROMANIA SRL	13,546
10	EURO CAR INTERNATIONAL SRL	13,501

The industry's tax expenses stood at RON 278,938,697 in 2016. In 2015 it paid taxes of RON 234,965,466. In 2014 the industry paid RON 182,607,742 in taxes.



EXPENSES ON TAXES BY SECTORS

RANK	SECTOR	RON	Y/Y CHANGE
1	SALE OF CARS AND LIGHT MOTOR VEHICLES	103,047,074	29.88%
2	WHOLESALE TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES	67,428,557	12.41%
3	MAINTENANCE AND REPAIR OF MOTOR VEHICLES	49,746,548	2.77%
4	RETAIL TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES	38,582,473	21.81%
5	SALE OF OTHER MOTOR VEHICLES	17,874,581	26.17%
6	SALE, MAINTENANCE AND REPAIR OF MOTORCYCLES AND RELATED PARTS AND ACCESSORIES	2,259,464	61.92%

V. PROFITABILITY

The industry's net profit amounted to RON 1,221,986,735 in 2016, compared to a net profit of RON 745,144,245 in 2015 and a net profit of RON 420,309,591 in 2014.

TOP 10 COMPANIES BY HIGHEST NET PROFIT IN WHOLESALE AND RETAIL TRADE AND REPAIR OF MOTOR VEHICLES AND MOTORCYCLES

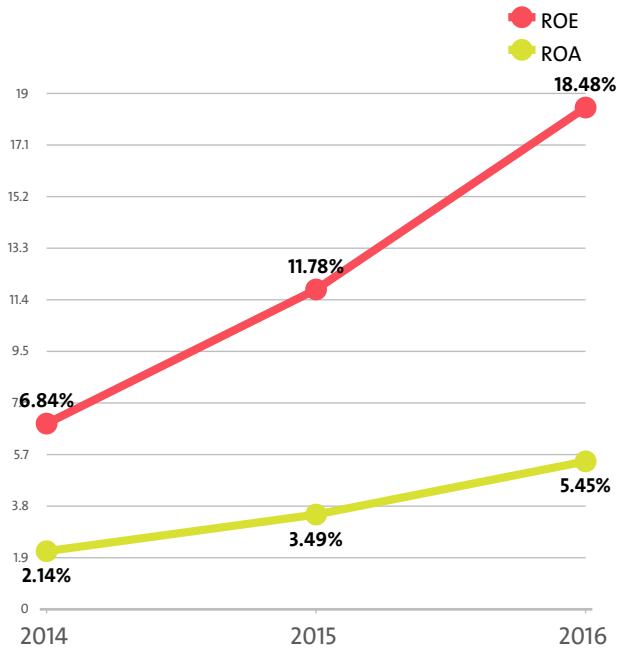
RANK	COMPANY	RON
1	PORSCHE ROMANIA SRL	105,154,786
2	MERCEDES-BENZ ROMANIA SRL	51,467,146
3	AUTONET IMPORT SRL	43,591,256
4	AD AUTO TOTAL SRL	33,183,627
5	RENAULT COMMERCIAL ROUMANIE SRL (FORMERLY KNOWN AS RENAULT NISSAN ROMANIA SRL)	30,387,667
6	PREMIUM AUTO SRL	24,875,927
7	MHS TRUCK & BUS SRL	24,732,442
8	TOYOTA ROMANIA SRL	11,839,680
9	DINAMIC 92 DISTRIBUTION SRL	9,710,293
10	AUTOKLASS CENTER SRL	9,601,753

TOP COMPANIES BY HIGHEST NET LOSS IN WHOLESALE AND RETAIL TRADE AND REPAIR OF MOTOR VEHICLES AND MOTORCYCLES

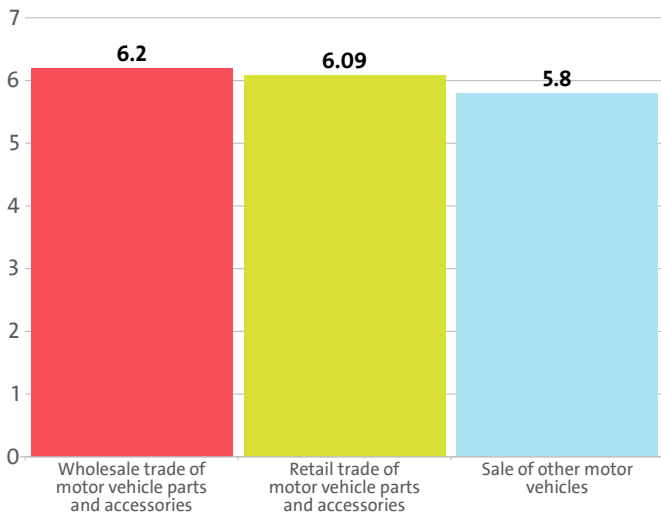
RANK	COMPANY	RON
1	G. ON SRL	8,404,189
2	MIDOCAR SRL	4,958,297
3	AUTO COBALCESCU SRL	3,814,541
4	MHS TRUCK SERVICE SRL	3,652,749
5	AUTOMOTIVE DIVISION SRL	3,275,354

The Wholesale and retail trade and repair of motor vehicles and motorcycles industry's return on equity (ROE) is 18.48% compared to 11.78% in 2015 and 6.84% in 2014.

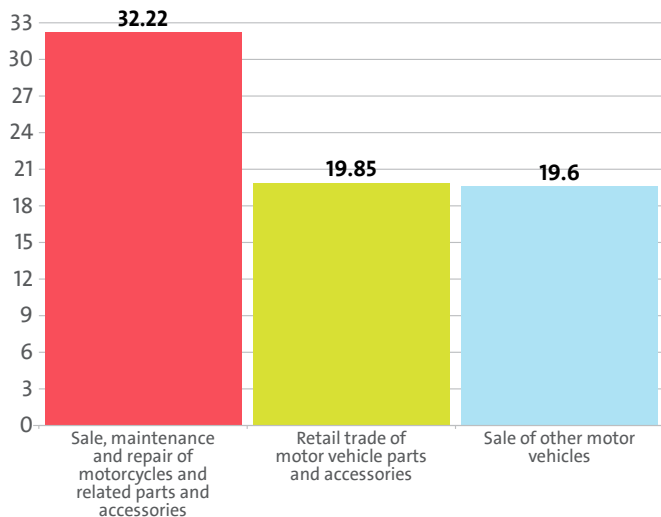
The Wholesale and retail trade and repair of motor vehicles and motorcycles's return on assets (ROA) was 5.45%, while in 2015 it amounted to 3.49% and 2.14% in 2014.



LEADING INDUSTRY'S SECTORS BY ROA



LEADING INDUSTRY'S SECTORS BY ROE



TOP 10 COMPANIES BY HIGHEST AVERAGE NET PROFIT PER EMPLOYEE IN WHOLESALE AND RETAIL TRADE AND REPAIR OF MOTOR VEHICLES AND MOTORCYCLES

RANK	COMPANY	RON	COMPANY HEADQUARTERS (CITY)
1	INTERCAR SERVICES 3001 SRL	3,842,579	BUCHAREST
2	QUANTUM AUTO TOTAL SRL	2,525,854	ILFOV
3	AUTO SERVICE MTRPLUS SRL	2,228,931	MURES
4	RADBURG SERVICE ANVELOPE S.R.L.	1,095,939	SUCEAVA
5	MITANGO SRL	945,287	BIHOR
6	PORSCHE ROMANIA SRL	745,779	VOLUNTAR
7	AUTO GENIAL SRL	744,786	PRAHOVA
8	TONTSCH SRL	717,449	ALBA
9	WEST TYRES SRL	686,988	BRASOV
10	EAE AUTOMOTIVE SRL	668,012	ARAD

About 10.00% of the 10 leading companies in terms of net profit per employee are located in Bucharest, while 10.00% are Ilfov-based and 10.00% are headquartered in Alba.

The average net sales revenue per employee in the Wholesale and retail trade and repair of motor vehicles and motorcycles industry amounted to RON 464,805 in 2016, up by 9.88% compared to 2015 and up by 25.93% compared to 2014.

The Wholesale and retail trade and repair of motor vehicles and motorcycles market generated an average RON 476,943 in total revenue per employee. In 2015 and 2014 the figure was RON 434,433 and RON 379,371, respectively.

The average total revenue per company in the Wholesale and retail trade and repair of motor vehicles and motorcycles industry grew to RON 2,147,410 in 2016 from RON 2,026,239 in 2015. The 2014 value was RON 1,806,156.

A company in the Wholesale and retail trade and repair of motor vehicles and motorcycles field made on average a net sales revenue of RON 2,092,759 in 2016, compared to RON 1,972,941 in 2015 and RON 1,757,316 in 2014.

The Wholesale and retail trade and repair of motor vehicles and motorcycles industry made 3.35% of the overall sales country-wide, rising its market share by 0.25 pp.

AVERAGE REVENUES PER EMPLOYEE IN WHOLESALE AND RETAIL TRADE AND REPAIR OF MOTOR VEHICLES AND MOTORCYCLES IN 2016

SECTOR	AVERAGE NET SALES REVENUE (RON)	AVERAGE TOTAL REVENUE (RON)	NUMBER OF EMPLOYEES
SALE OF OTHER MOTOR VEHICLES	1,284,425	1,325,199	1,947
SALE OF CARS AND LIGHT MOTOR VEHICLES	1,370,996	1,399,370	14,581
WHOLESALE TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES	555,288	569,235	16,426
RETAIL TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES	241,860	247,557	14,303
MAINTENANCE AND REPAIR OF MOTOR VEHICLES	119,882	126,010	37,875
SALE, MAINTENANCE AND REPAIR OF MOTORCYCLES AND RELATED PARTS AND ACCESSORIES	384,128	391,634	527

AVERAGE REVENUE PER COMPANY IN WHOLESALE AND RETAIL TRADE AND REPAIR OF MOTOR VEHICLES AND MOTORCYCLES IN 2016

SECTOR	AVERAGE NET SALES REVENUE (RON)	AVERAGE TOTAL REVENUE (RON)	NUMBER OF COMPANIES
SALE OF CARS AND LIGHT MOTOR VEHICLES	12,980,838	13,249,494	1,540
SALE OF OTHER MOTOR VEHICLES	7,814,925	8,063,006	320
WHOLESALE TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES	3,748,935	3,843,095	2,433
RETAIL TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES	757,130	774,965	4,569
SALE, MAINTENANCE AND REPAIR OF MOTORCYCLES AND RELATED PARTS AND ACCESSORIES	710,300	724,179	285
MAINTENANCE AND REPAIR OF MOTOR VEHICLES	459,663	483,158	9,878

The total indebtedness of the companies in the Wholesale and retail trade and repair of motor vehicles and motorcycles industry was RON 15,204,512,027 versus RON 10,233,658,613 a year ago. In 2014 the industry's indebtedness totalled RON 12,976,237,689.

INDUSTRY'S INDEBTEDNESS BY SECTORS (RON)

SECTOR	2016	2015	2014
SALE OF CARS AND LIGHT MOTOR VEHICLES	5,378,584,370	3,947,882,866	3,950,050,653
WHOLESALE TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES	3,787,217,884	3,074,055,557	3,391,771,035
MAINTENANCE AND REPAIR OF MOTOR VEHICLES	3,267,932,194	1,465,237,041	2,858,289,170
RETAIL TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES	1,739,761,555	775,805,522	1,633,173,949
SALE OF OTHER MOTOR VEHICLES	888,924,434	920,205,910	1,026,141,564
SALE, MAINTENANCE AND REPAIR OF MOTORCYCLES AND RELATED PARTS AND ACCESSORIES	142,091,590	50,471,717	116,811,318

Debt-to-assets ratio of the companies in the industry is 0.68 in 2016. It was 0.48 in 2015 and 0.66 in 2014.

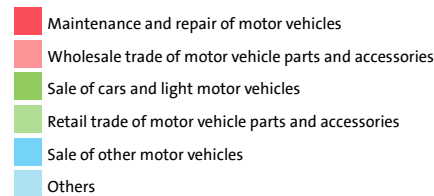
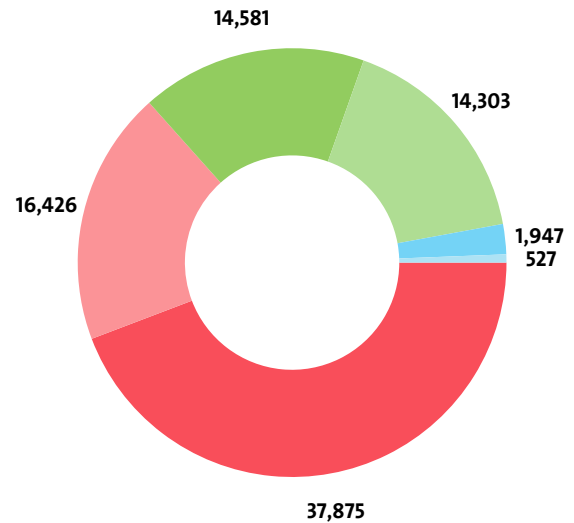
VI. EMPLOYMENT

A total of 85,659 people were employed in the Wholesale and retail trade and repair of motor vehicles and motorcycles field at the end of 2016, compared to 83,702 in 2015 and 80,631 in 2014.

NUMBER OF EMPLOYEES BY INDUSTRY SECTORS

SECTOR	NUMBER	SHARE OF INDUSTRY TOTAL
MAINTENANCE AND REPAIR OF MOTOR VEHICLES	37,875	44.22%
WHOLESALE TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES	16,426	19.18%
SALE OF CARS AND LIGHT MOTOR VEHICLES	14,581	17.02%
RETAIL TRADE OF MOTOR VEHICLE PARTS AND ACCESSORIES	14,303	16.70%
SALE OF OTHER MOTOR VEHICLES	1,947	2.27%
SALE, MAINTENANCE AND REPAIR OF MOTORCYCLES AND RELATED PARTS AND ACCESSORIES	527	0.62%

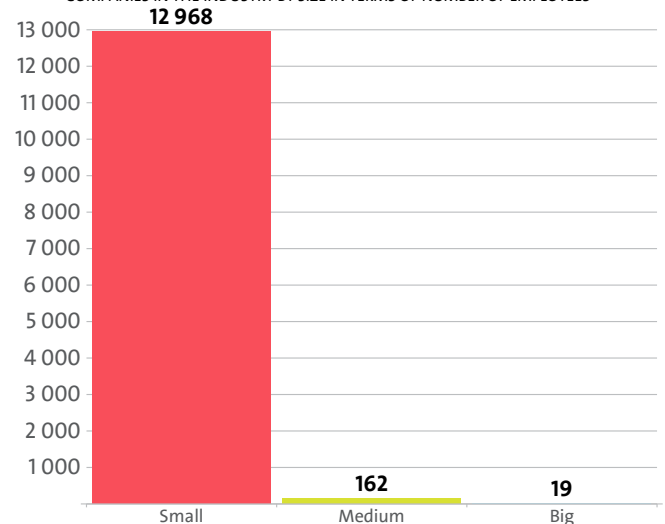
ALLOCATION OF EMPLOYEES BY INDUSTRY'S SECTORS



The analysis on companies' sizes by the number of employees, shows that 12968 firms have less than 50 employees*, 162 have between 50 and 250 employees* and 19 companies employ more than 250*.

* Companies without data in the number of employees at end of the year are not taken into consideration.

COMPANIES IN THE INDUSTRY BY SIZE IN TERMS OF NUMBER OF EMPLOYEES



The employees of the leading 10 companies when it comes to numbers make up 7.74% of the workforce in the industry in 2016.

TOP 10 FIRMS BY SHARE IN INDUSTRY'S TOTAL NUMBER OF EMPLOYEES

RANK	COMPANY	NUMBER OF EMPLOYEES	SHARE
1	AUTONET IMPORT SRL	1,188	1.39%
2	AD AUTO TOTAL SRL	1,142	1.33%
3	TIRIAC AUTO SRL	1,024	1.20%
4	UNIX AUTO SRL	611	0.71%
5	AUTO COBALCESCU SRL	563	0.66%
6	EVW HOLDING SRL	457	0.53%
7	PORSCHE INTER AUTO ROMANIA SRL	455	0.53%
8	CONEX DISTRIBUTION SA	406	0.47%
9	BARDI AUTO SRL	396	0.46%
10	ELIT ROMANIA PIESE AUTO ORIGINALE SRL	390	0.46%

The Wholesale and retail trade and repair of motor vehicles and motorcycles industry is the 12th largest employer in the country with 85,659 employees with the largest employer being Retail trade, except of motor vehicles and motorcycles with 437,697 and Activities of extraterritorial organisations and bodies at the bottom with 1 employees.

We expect, based on the trend in the last three years, the number of employees of the Wholesale and retail trade and repair of motor vehicles and motorcycles industry to change at a compound annual growth rate (CAGR) of 3.07% in 2017.

Do not hesitate to contact us

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