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डाकार

MARKET STUDY ON OPPORTUNITIES IN " THE AUTOMOTIVE SECTOR IN SENEGAL"



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Institut de Sondages et d'études de marchés, Société(BDA)
Point E – Rue de louga X Rue 8 – Tél : 33 825 68 55 – Email : bda@institutbda.com – Web : http://www.institutbda.com

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Point E – Rue de louga X Rue 8 – Tél : 33 825 68 55 – Email : bda@institutbda.com – Web : http://www.institutbda.com

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Point E – Rue de louga X Rue 8 – Tél : 33 825 68 55 – Email : bda@institutbda.com – Web : http://www.institutbda.com

I. OBJECTIVES OF THIS STUDY

The objective of this study is to have a global and cross-functional view on the supply of the automotive market.

It will be about to:

- Identify the most important players in the industry namely the car dealers, the selling car parks, the manufacturer, and local assemblers;
- classify these players by their position: new seller / second-hand dealers, exclusive dealer, multi etc.
- Assess the annual sales volumes and main dealer;
- Estimate imports of vehicle, local production and eventually export
- Make an inventory of local assembly plants of vehicles: the companies involved, the production and eventually the export.
- Understand the laws, regulations (age of the vehicle) and tax requirements,
- Identify the characteristics of the products: vehicle types, brands / origins, feature economical characteristics etc.
- Provide support and facilitate increase in the market share of automotive and automotive spare parts exports to Senegal and ECOWAS
- Assess Investment opportunities in the automotive sector
- Drive around different business strategies in place on the Senegalese market.
- Evaluate the opportunities for the establishment of car assembly units;
- Identify the credit opportunities and financing the sector;
- Put a focus on two-wheels sector;
- Identify Barriers to sector entry
- Conduct a SWOT analysis

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II. Overview of the automotive sector in Senegal

The growth of the automotive sector is an important element in the economic development of a country. It contributes to the realization of development objectives through support to productive sectors and to competitive reinforcement and to the improvement of the mobility of people and goods. That is why the world, economic policy makers, investors and entrepreneurs pay special attention to it.

Several efforts have been made in Senegal by the government through the adoption of replacement of buses called « cars rapides » and minibus replacement projects in order to facilitate better facilities and thus create an environment conducive to the development of the national economy. Several motorists and dealers with diversified products are keen to support the government in its policies with a view to fulfilling the overall well-being of Senegalese people

Today, Senegal remains one of the major West African countries in the sale of vehicles in terms of quantities. Nevertheless, this growing sector is facing major difficulties, especially with the new regulations in favor of the second-hand market and the high cost of new vehicles.

In Senegal, selling a new car is not commonplace. Especially since President Macky SALL, allowed the importation of older used cars a bit older. But this market is very slow (it grows from 5 to 10% per year). For some dealers, this slowness is due to the high cost of the vehicle in the local context and to the fact that banks do not lend to individuals. Thus, CFAO Motors Senegal's statistics indicates that more than half of sales are made with private companies while individuals buy only 27% of vehicles. In fact, banks place greater reliance on businesses than on individuals, making cars difficult to sell.Naturally, people turned to the used second hand used car market. Former President Abdoulaye Wade, these vehicles should not be older than 5 years. On his arrival, Macky Sall overturned the previous ruling to raise to 8 years the age limit of imported cars. This had negative impact on the dealers, who had already

noticed, just in early 2012, a market collapse of 8%. As if that was not enough, the Chinese also landed on the market with new but cheap alternatives: their brands like Great Wall or Cherry are worth 30 to 40% cheaper than their Western equivalents.

Source: griot.info

In addition, 80% of the country's transport infrastructure is concentrated in the Dakar region. Since 2003, Senegal has undergone major improvements in transportation, particularly in commercial and second-hand vehicles.

Source: SCIMPEX[1], 2015 and ANSD (2015)

III. Project of Renewal of the fleet of "cars rapides" and ndiagandiaye

In May 2000, the International Development Association (IDA) approved a project to improve urban mobility, including the introduction of a leasing system. This scheme was to support the replacement of an aging minibus fleet, to facilitate access to credit for private transport operators as part of the leasing of some 500 vehicles by the Professional Finance Association Urban transport in Dakar (AFTU) (Kumar and Diou, 2010).

At the end of 2002, minibus operators were still not willing to participate in this program. The decision of the Executive Board of Urban Transport in Dakar (CETUD) made it possible in early 2003 to resolve the situation and to convince the independent operators to form Economic Interest Groups (GIE). In November 2003, the system came into force with the signing of the first contract for minibuses.

In 2005, it operated at full capacity in May 2005 when the GIEs set up their own microfinance organization (Mectrans). In September 2008, 505 new minibuses were in service under this scheme, the objective of partially renewing the aging fleet and improving the services and comfort of passengers was achieved. This mechanism, which isunprecedentedin the region, has replaced nearly one fifth of the existing fleet. The acquisition of these new minibuses has considerably transformed the urban transport landscape in Dakar.

[1]Syndicate of Traders, Importers, Service Providers and Exporters of Senegal

Most recently in 2016, President Macky Sall inaugurated 475 buses (Ashok Leyland buses from India) which were part of larger fleet purchase intended to support existing Dakar-Dem-Dikk operations in Dakar , Inter-city and to cater to schools and institutions.

IV. Registration and regulating of vehicles use in Senegal

IV.1 Rules for the age of vehicles imported in Senegal

- In 2001, the government enacted a law (decree n ° 2001 - 72 of 26 January 2001) prohibiting the import into Senegalese territory of vehicles over 5 years old.

- Decree No 2012-444 of 12 April 2012 amending Decree No 2001-72 of 26 January 2001 on the importation of used vehicles, cycles and mopeds.For example, the Customs of Senegal specifies that under the new regulations, the importation into Senegal of the following used motor vehicles, cycles and mopeds is prohibited throughout the territory:

✓ Light commercial vehicles of 3.5 tons of gross vehicle weight (PTAC) or less, over eight (08) years old;

✓ vehicles designed for the transport of persons, with a seating capacity of at least seven (07) and an age of more than eight (08) years;

✓ Goods transport vehicles of more than 3.5 tons of GVWR and whose age exceeds ten (10) years;

✓ Used cycles and mopeds of a cylinder capacity not exceeding 50 cm3.

V.2 Influx of used vehicles after the revision of the 2001 ruling

As a result of the 2001 decrees, there has been an alarming rise in the number of new dealer of cheap vehicles, which have become more and more interested in the Senegalese market.

As a result, the automotive sector experienced continuous growth until 2015 when there was a slight decline in the sale of new vehicles. This decrease is probably due

to the revision in 2012 of the age of imported vehicles, which went from 5 years to a maximum of 8 years, thus especially penalizing the market of new cars.

This ruling raising the age of vehicles eligible for import into Senegal from five to eight years has caused the Dakar car fleet to explode. Thus, there is a contraction of the new market in favor of used vehicles.

Source: Senegalese Customs (2015)

Indeed, about 30 000 used vehicles were sold in Senegal in 2014, in comparison to 2 000 to 3 000 new vehicles sold. Note that these used vehicles exist in diversified brands of European, Asian and American origin.

Source: (Christophe Le Bec, 2015)[2]

Only in Dakar, about 78,000 second-hand cars were imported in 2014, of which about 35,000 were re-exported by road to Mali and Niger and 30,000 were sold in Senegal. By comparison, only 2,000 to 3,000 new vehicles are sold in the country of Teranga.

SourceJérôme Barth, General Manager of "la Senegalaise de l'Automobile" (SDA).

This flourishing market is controlled by the informal sector, and escapes well-established distributors like CFAO, «lasénégalaise de l'automobile "to name just those, concentrated on the new cars. These cars dealers are present only occasionally to sell vehicles from their own long-term rental fleets, i.e., barely 800 cars per year for CFAO in French-speaking countries in Africa and only 250 for SDA (la sénégalaise de l'automobile) in Senegal, a very small proportion of the second-hand fleet. Any other intrusion of the official distributors has for the moment ended in a bitter failure.

With regard to these scourges the question is "How to fight compete with roadside vendors, often well connected politically, having networks of supply and customs clearance at broken prices, and very innovative to tweak options of counterfeiting or Crafting some dangerous Repairs? » The main difficulty lies in the fact that the

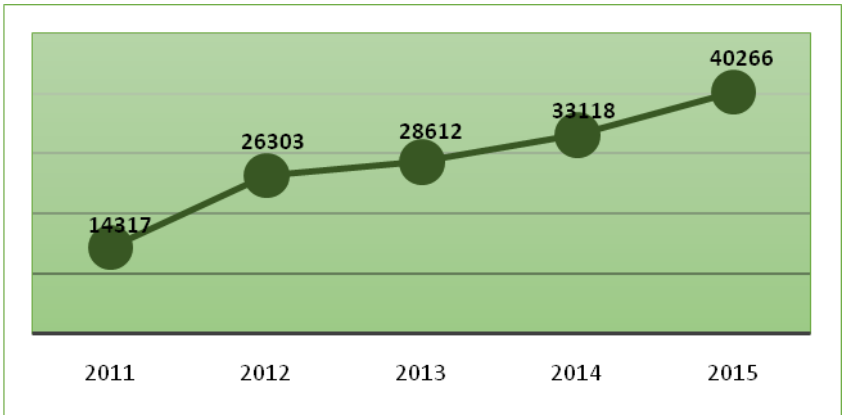
[2]Selon le journal en ligne "Jeune Afrique"

actors who evolve in the used car markets have strong relations with authorities that regulate the automobile market.

This new law has resulted in a net evolution of 83% of the number of imports with 26,303 clearances in 2012 against 14,317 vehicles cleared through customs In 2011 for a receipt of nearly CFAF 23 billion (an increase of 22.55% compared to the previous year). This upward trend was maintained in 2013 and 2014 with 28,612 vehicles cleared in 2013 and 33,118 in 2014 (an increase of 15.74%). The Colonel reassured that the year 2015 could beat the record, given the situation already recorded between January 1 and 27, with 7011 clearance operations for CFA 1.741 billion. So the number of vehicles to be clear in 2015 is estimated to 40266 vehicles.

Source: Colonel AmadouGambyDiop, Head of the Customs Public Relations and Communications Office

Graphic 1: vehicles cleared in Senegal between 2011 and 2014



Sourc :Senegalese customs

According to Business Intelligence (2016), this law would have resulted in a decrease in the sale of new registered vehicles from 6365 in 2014 to 6268 in 2015, a fall of 4.5%.

IV.3 Customs clearance of vehicles

The only complement customs offices for the clearance of vehicles imported into Senegal are those of Dakar-Port Nord and Dakar-Port Sud. However, in exceptional cases (vehicles cleared through clearance of suspensive regimes at the level of large regional companies, accident vehicles, wrecked vehicles and / or totally

immobilized vehicles, for example), regional customs offices may be authorized to clearance.

IV.3.1 The actors

The following actors are involved in the clearance of vehicles:

- customs

- Taxes and Domains

- the Formal Sector

- the Informal Sector

- the details

- Freight Forwarders

- the Transfer Service

IV.3.2 Presentation of the calculation of the duties and taxes determining the elements of taxation

IV.3.2.1 Tax calculations presentation

The cumulative rate of duty and tax applicable is broken down as follows:

Used passengers cars (87 03) :

DETAILS	CALCULATION	AMOUNT	TOTAL
Duty without incidence	DD[3] +RS[4] +PCS[5] +PCC[6]	20 +1 +1 +0,5	22.500%
TVA	(base +DD +RS) × rate	(100 +20 +1) ×18%	21,780%
Registration duty	(base +DD +RS +TVA) × rate	(100 +20 +1 +21.78) ×3%	4,283%
		Total	48.563% **48.57%**

[3]Custom duty
[4]Statistical fee
[5]Solidarity Levy
[6]ECOWAS community Levy

Source: Senegalese custom; https://www.douanes.sn/fr/node/103

New passengers cars

DETAILS	CALCULATION	AMOUNT	TOTAL
Dutywithout incidence	DD +RS +PCS +PCC	20 +1 +1 +0,5	22.500%
TVA	(base +DD +RS) × rate	(100 +20 +1) ×18%	21,780%
Registration duty	(base +DD +RS +TVA) × rate	(100 +20 +1 +21.78) ×2%	2.855%
		Total	47,135% **47.14%**

Source: Senegalese custom; https://www.douanes.sn/fr/node/103

Used utility vehicles (87 04)

DETAILS	CALCULATION	AMOUNT	TOTAL
Duty without incidence	DD +RS +PCS +PCC	10 +1 +1 +0,5	12,500%
TVA	(base +DD +RS) × rate	(100 +10 +1) ×18%	19,980%
Registration duty	(base +DD +RS +TVA) × rate	(100 +10 +1 +19,980) ×3%	3.929%
		Total	36.409% **36.41%**

Source: Senegalese custom; https://www.douanes.sn/fr/node/103

New utility vehicles

DETAILS	CALCULATION	AMOUNT	TOTAL
Duty without incidence	DD +RS +PCS +PCC	10 +1 +1 +0,5	12.500%
TVA	(base +DD +RS) × rate	(100 +10 +1) ×18%	19.980%
Registration duty	(base +DD +RS +TVA) × rate	(100 +10 +1 +19,980) ×2%	2.619%
		Total	35.099% **35.10%**

Source: Senegalese custom; https://www.douanes.sn/fr/node/103

Special purpose vehicles of 87 05 (tow trucks, crane trucks, sweeper cars, Concrete truck, etc.) and Tractor units for semi-trailers (87 01 20)

DETAILS	CALCULATION	AMOUNT	TOTAL
Duty without incidence	DD +RS +PCS +PCC	05 +1 +1 +0,5	7.500%
TVA	(base +DD +RS) × rate	(100 +05 +1) ×18%	19.080%
Registration duty	(base +DD +RS +TVA) × rate	(100 +05 +1 +19.080) ×3%	3.752%
		Total	30.332% **30.34%**

Source: Senegalese custom; https://www.douanes.sn/fr/node/103

Crawler tractors (87 01 30), tractors (87 01 10), new or used

DETAILS	CALCULATION	AMOUNT	TOTAL
Duty without incidence	DD +RS +PCS +PCC	05 +1 +1 +0,5	7,500%
TVA	(base +DD +RS) × rate	(100 +05 +1) ×18%	19,080%
Registration duty	Non applicable	---	---
		Total	26,580% **26.59%**

Source: Senegalese custom; https://www.douanes.sn/fr/node/103

IV.3.2.2 Calculation method

Taxable value: vehicle value + freight amount + other charges

Amount of duties and taxes = Taxable value x 47.14% (for the news vehicles for example).

IV.3.2.3 FOB values for vehicles

- **News vehicles :**

The FOB value retained is the highest value between the value of the invoice and the catalog price at the export rate or, failing that, the price obtained after assimilation (In the case of vehicles not intended for the French market and therefore not included in the catalog or in the argus). Argus can be loosely said as the Customs Reference Book for car valuation.

However, for vehicles imported by dealers, the FOB value retained is that of the invoice, after application of the adjustment rate.

NB: The price of fittings and equipment fitted which are not part of the normal equipment of the basic model of the imported vehicle must be included, where applicable, in the reportable value.

- Used vehicles

Vehicles which have already been registered before being imported into Senegal shall be considered as such.
However, the affixing of a garage plate (WW) is not considered a registration. Indeed, it allows, most often, to circulate the vehicle in a timely manner, to approach its point of export.
Several cases may arise:

Vehicles not yet listed on the argus:

It is the vehicles which, due to a recent release for consumption, are not yet listed on the argus. The FOB value to be retained is the higher of the invoice value and the list price at the export price of the new vehicle on which the following allowances are applied:

- Put into circulation in the month preceding customs clearance: 5%;
- Put into circulation two (02) months before customs clearance: 15%;
- Put into circulation three (03) months before customs clearance: 20%;
- Put into circulation more than three (03) months before customs clearance: 1% per month in addition to the above abatements.

Every month begun must be considered complete. The maximum amount of depreciation calculationated in accordance with the above principles may not exceed 75% of the price of the new vehicle.

Vehicles quoted in the Argus

The FOB value to be retained is the highest value between the invoice value and the quotation on the argus. In the case where the quotation is higher, a reduction of 20% is applied.

Vehicles that are no longer quoted to the argus due to their advanced age:

The value to be retained is the higher value between the invoice value and that of the last quotation of the vehicle at the argus.

Injured vehicles (reusable or not) and imported shipwrecks:

These are the only cases where the use of expertise is foreseen. The value chosen is assessed by the department on the basis of an expert report. No certificate of release for consumption shall be issued in respect of the clearance of wrecks.

Vehicles temporarily admitted on an exceptional basis:

When they are released for consumption, the value to be retained is that declared at the time of entry. The duties and taxes are then increased by a credit interest.

Sale by diplomatic missions and assimilated organizations (international organizations and NGOs):

The CIF value to be retained is the value of the tender, when the sale is made in the presence of the Customs. Failing this, customs clearance shall be carried out in accordance with the principles described above.

IV.3.2.4 Freight value to be retained for vehicles

The cargo to be retained for imported vehicles is the higher one between the invoice and the minimum amount indicated below:

5-seater passenger vehicles:

- Europe Area 500$

- Africa Area 500$
- America Area 833$
- Asia Area 833$

7-seater passenger vehicles:

- Europe Area 750$
- Africa Area 750$
- America Area 1083$
- Asia Area 1083$

Light commercial vehicles (types Combi, Partner, Berlingo, C/S):

- Europe Area 500$
- Africa Area 500$
- America Area 833$
- AsiaArea 833$

Heavy commercial vehicles (types: 508, 608, 307, covered and similar SG2, SG3, 504):

- Europe Area 1500$
- Africa Area 1500$
- America Area 2000$
- Asia 2000 $

Trucks (multi-axle):

- Europe Area 500$
- Africa Area 500$
- America Area 833$

Trucks of the trailer and bus type (large model):

- Europe Area 3333$
- Africa Area 3333$
- America Area 4167$

- Asia Area 4167$

Tractor vehicles with trailers:

- Europe Area 1667$
- Africa Area 1667$

- America 2167$
- Asia Area 2167$

Special cases:

- Vehicles carried on another vehicle: When the importer carries vehicles on other vehicles, this does not affect the above considerations.
- Vehicles imported by land: The freight to be retained is formally fixed (Europe area) as follows:

Types of vehicles	Freight to beheld
Vehicle of tourism of 5 places	333 $
Vehicles of tourism of 7 places	500 $
Light commercial vehicles	500 $
Heavy dutyvehicles	1167$
Tipper Trucks	1667$
Heavy Vehicles	2500
Tractorunits / trailers	833$

- Vehicles temporarily admitted as an exception: The freight to be retained is the same as that which was to be applied at the entrance
- Vehicles admitted on a temporary basis (IT and TT): The freight to be retained is that in force on the date of release for consumption
- Vehicles transported by container: The freight to be retained is that of the container.

IV.3.2.5. Vehicle Clearance Procedure

Once taxes are calculated, vehicles can be cleared through customs. Note that the flat rate of 44.48% is applicable to all kinds of vehicles (two wheels, tricycles, etc.). To carry out customs clearance, the freight forwarder drafts a detailed note in which he reports all the information at his disposal (tariff heading ...) and attached to the customs declaration.

The declaration is compiled by the GAINDE 2000 system.(a software developed in Senegal)

In the declaration the forwarder specifies the method of payment desired by the importer.

- **Declaration in cash:**

In this case, the importer presents himself personally through the authorized customs agent to the Dakar Port Collection Office. Payment is made by certified check. The receipt of payment from the Consolidated Revenue Fund shall be attached to the declaration. This receipt will serve as a means of proof. It will make it possible to prove to the inspector at the time of the verification that the payment has been made.

- **Declaration to credit:**

Any approved customs broker shall have an appropriation for the removal of an amount of CFA 60,000,000 from the Treasury.

Source: Manual of Customs Procedures Sub-Manual 7: Clearance of Vehicles

The declaration is then filed at the Customs office where the inspector will check the conformity of the elements before issuing the voucher to be removed.

Source: Annexe 4 –Sub manuel 7

- Formalities to carry import of vehicle at the Port Autonome of Dakar:

The authorized customs agent shall ensure the settlement of freight with the shipping company. If this is the case the latter issues a voucher to remove shipping company (different from voucher to be removed from customs).

With this document, the authorized customs broker shall present himself at the parking place of the vehicle. It will then be necessary to obtain the visa of the Port Autonome of Dakar by paying the port tax. He must then present the voucher to remove from the Customs at the Customs Brigade. This customs service is different from the one that initially filled out the documents. The brigade checks certain items such as the chassis number, the vehicle.

So, the vehicle can go out.

IV.4 Rights and Taxes required

Independent of the obligation of the declaration, the imported goods must give rise, on the one hand, to the payment to Customs Administration of the duties and taxes

provided for in the Customs Tariff and to the collection of these duties and taxes by the Treasury.

However, by way of exception from this principle, exemption from duties and taxes or other facilities shall be granted to travelers entering Senegal. Accordingly, under certain conditions, non-residents may be authorized by the Director-General of Customs or the Director of Studies and Customs Legislation to import under the temporary importation procedure, one (01) vehicle or vessel For a period not exceeding six (06) months.
In the case of passenger vehicles, the non-resident may import temporarily under cover of a valid passport (A.T.A). It can also benefit for its motor vehicle of a passage before circulation on its entry on the Senegalese territory. The pass-avant is then established by the Bureau or the Post of the Customs of entry, for a duration not exceeding ten (10) days. This pass-avant may be subject only to a maximum of two (2) extensions of fifteen (15) days each, granted by the Customs Operations Directorate.

In any event, at the expiry of the period of temporary stay, the vehicle must be declared in detail before any transfer:
- for re-export;
- for release for consumption, with payment of duties and taxes due;
-for temporary admission, in the event that the new purchaser would benefit from this suspensive procedure;
- finally, by way of a protective measure, for the automatic deposit.

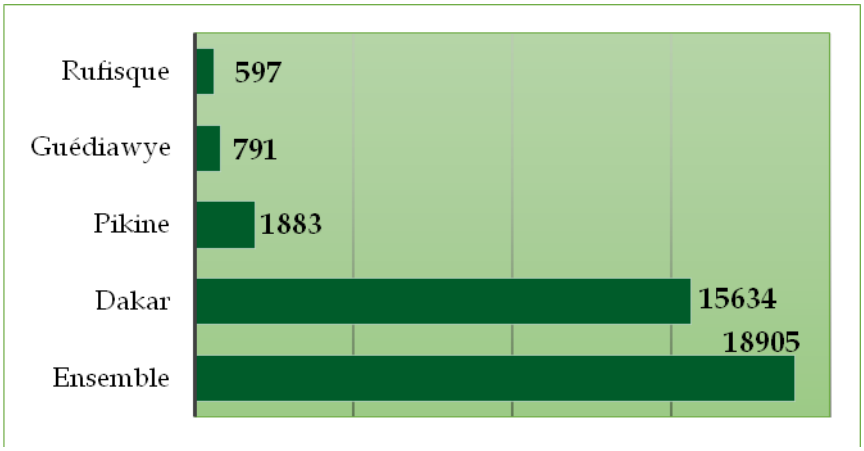
Source: Senegalese Customs

IV.5 Evolution of vehicles registrations

In 2012, the total number of vehicles registered in Dakar amounts to 18 905 as indicated before the following graph. With 15,634 registered vehicles, the department of Dakar has the most vehicles registered in 2012. It is followed by Pikine with 1883. Guédiawaye comes in third position with 791 registered vehicles. The department of Rufisque counts the least with only 597 registrations.

Source: SES (ANSD, 2015)

Graphic 2: Vehicle registration in Dakar region



Source: Report of the ANSD (2015) on the Economic and Social Situation in 2012

Also, the report indicates that registrations are more for passenger cars (13362) and light trucks (2311). The semi-trailers followed with 1074 registrations; Followed by tractors and trucks totaling 946 and 317, respectively. Rental buses and private passenger transport register the lowest number, ie 1. The following table shows the distribution according to the category and the departments in 2012 in Dakar.

Table 1: Breakdown of registrations by category and department in 2012

Catégories/Département	Dakar	Pikine	Guédiawaye	Rufisque	Total
Rental Coach	1				1
Intercity Coach	33	9	2		44
Staff Coach	54	8	1	4	67
Truck	241	44	11	21	317
Van	2005	174	54	78	2311
Urban Minibus	21	16	13		50
Trailer Semi-trailer	750	194	57	73	1074
Urban Taxi	209	28	10	3	250
Tractor	664	167	35	80	946
Private Transport of Persons					1
Private Transport of Goods	23	2			25
Custom Vehicle	11273	1187	591	311	13362

MedicalVehicle	**28**		**1**		**29**
SpecialVehicle of Transport	**161**	**53**	**13**	**27**	**254**
DrivingschoolVehicle	**5**	**1**			**6**
Rentalvehicle	**133**				**133**
Tourist transport vehicle	**30**		**3**		**33**
Public worksvehicle	**2**				**2**
Total	**15634**	**1883**	**791**	**597**	**18 905**

Source: Regional Transport Service of Dakar quoted by the ANSD (2015)

In 2014, 6268 new vehicles were registered by the national concessionaires last year, including 1670 for « Senegalaise de l'automobile », a market share of 26.65%. For this company, the year 2015 dedicated to the utility. Indeed, with a total of 168 units sold, « senegalaise de l'automobile » is the leader and has a 43% market share in this segment.

However, in 2015 sales decreased by 4.5% compared to 2014. The number of vehicles sold dropped from 6,563 to 6,268 for all dealers. The SCIMPEX report, however, shows a craze for the Mitsubishi brand which alone accounts for 14.69% of overall sales. 921 vehicles of the brands sold by the dealership in 2015.

The Senegalese market is going through a very good start of 2016. Indeed, 2863 vehicles were sold from January to May 2016 against 2546 units in 2015 (an increase of 12.45%). Concerning the segment of personal cars, there is an increase of 25.35% whereas it is 45.33% for the SUV / 4x4. These vehicles pull the market up.

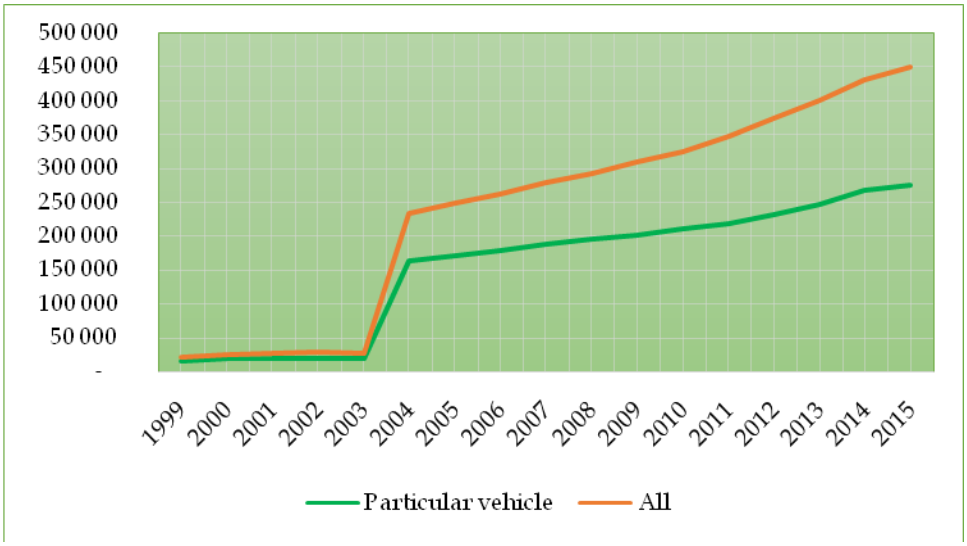
Source: Syndicate of Traders, Importers, Service Providers and Exporters in Senegal (SCIMPEX) (2015) and Déclic Car (2016)

V. Analysis of the Senegalese fleet

V.1 Evolution of the fleet from 1999 to 2015

The chart below shows the trend of the automobile fleet in Senegal from 1999 to 2015. The chart shows the impact of the 2001 decree on the automotive market. Two years after this decree, there is a rapid growth of the car fleet from 25, 235 to 235,097 (ie a growth of 810%). This growth is driven in part by personal cars (from 18421 in 2003 to 163,232 in 2004, representing 786% growth), which represent a large proportion of the fleet. Since 2003, the upward trend has continued until 2015, reflecting a good performance of the vehicle market in Senegal.

Graphic 3: Evolution of the car fleet between 1999 and 2015



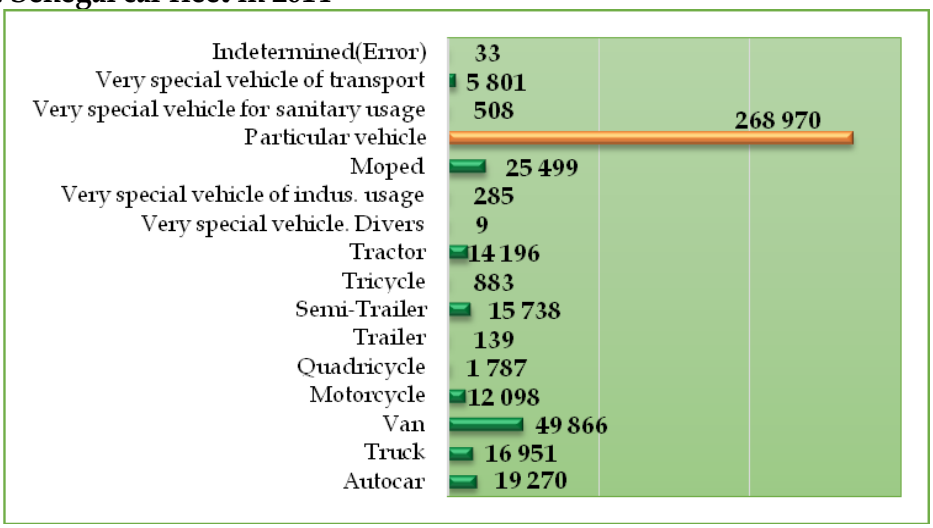
Source: ANSD/DSECN/DSE/BSS

V.2 Senegal car fleet in 2014

The situation of the automobile fleet in 2014 shows that the car fleet consists mainly of personal cars (268970), representing 62.26% of all vehicles (see graph below). Then came the vans (49866), the mopeds (25499), the buses (19270), the trucks (16951) (cf graphic 4).

Institut de Sondages et d'études de marchés, Société(BDA)
Point E – Rue de louga X Rue 8 – Tél : 33 825 68 55 – Email : bda@institutbda.com – Web : http://www.institutbda.com

Graphic 4: Senegal car fleet in 2014

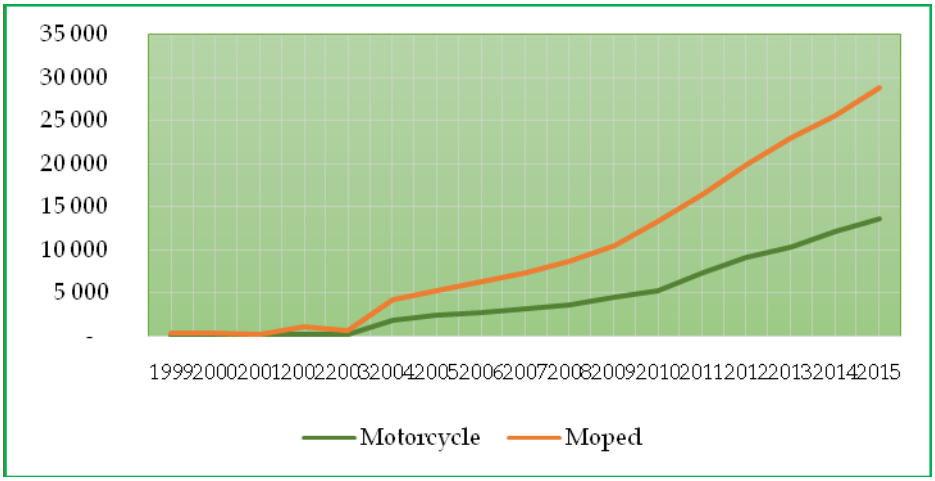


Source: ANSD/DSECN/DSE/BSS

V.3 Focus on both wheels, trailers and semi-trailers

According to the Director General of the Senegalese Automobile (SDA), the market of two-wheeled vehicles performs well between 2014 and 2015 with a total of 509 units sold, representing 46% of the market share. The evolution of the fleet of two-wheeled vehicles shows steady growth from the 2001 decree to 2015. The fleet of motorcycles is 13639 in 2015 while that of mopeds is 28831 Compared to 271 and 767 in 2003 respectively.

Graphic 5: Evolution of motorcycles and mopeds

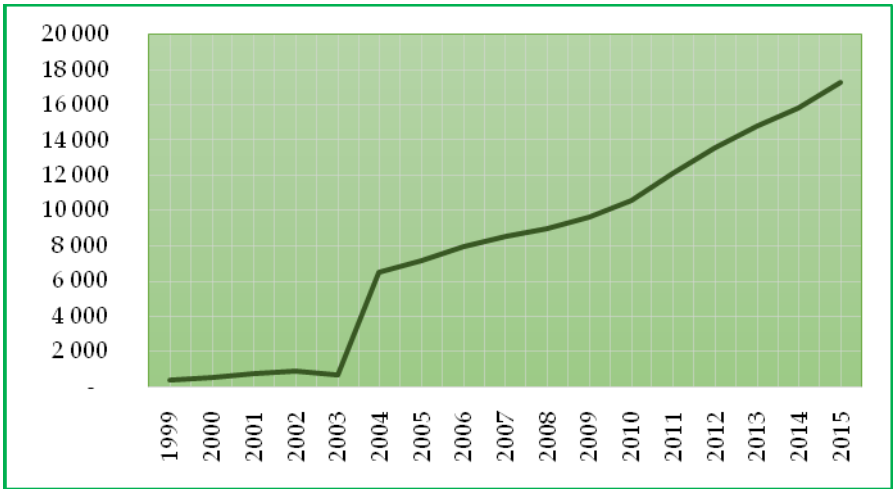


Source: ANSD/DSECN/DSE/BSS

As for trailers and semi-trailers, they follow the same trend as cars fleet and personal cars. According to the following graph, there is a sharp break likely resulting from

the vehicle age limitation decree in 2001. To this end, the number of trailers and semi-trailers increased from 668 (including 3 trailers) in 2003 to 6520 (Including 122 trailers) in 2004 (a net increase of 876%). In 2014, Senegal has 15,877 trailers and semi-trailers (including 139 trailers). This number is 18,310 in estimated to 2015.

Graphic 6: Trailers and semi-trailers



Source: ANSD/DSECN/DSE/BSS

As for the type of automobile, we can mention cars, two wheelers (including scooters), tricycles and even quads. It should be noted that most commercial vehicles are those of tourism (93.7%), the rest being commercial vehicles (SCIMPEX, 2015).

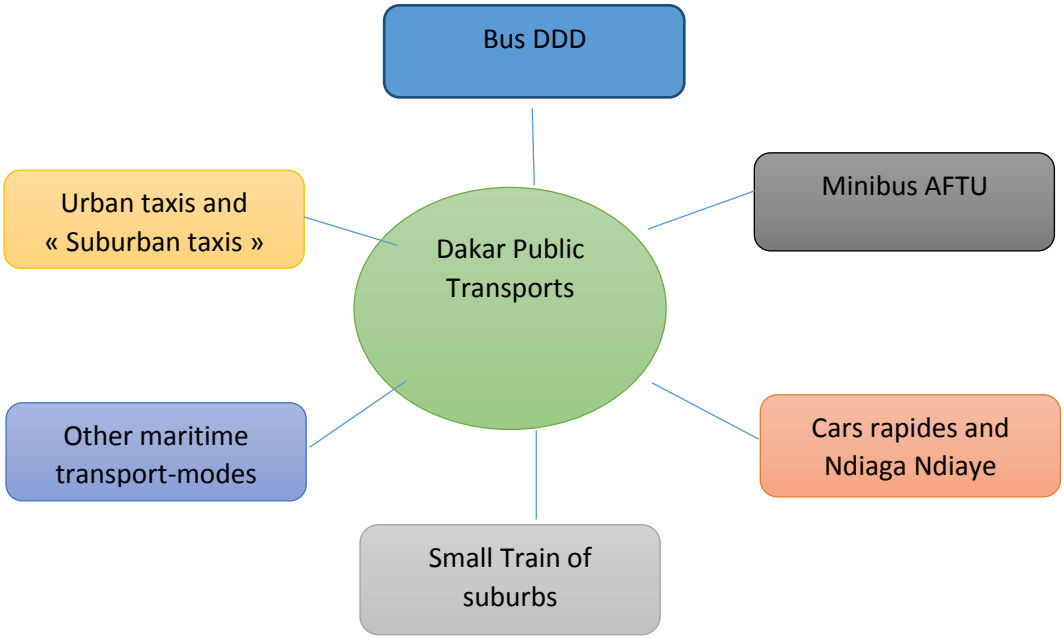
The ANSD report (2015) indicates the existence of a plurality of automobile categories. We can mention: Hire Coach, Intercity Coach, Personal Coach, Truck, Van, Urban Minibus, Trailer Semi-Trailer, Taxi Urban, Tractor, Private Transport and Persons, Private Transport of Goods, Personal Vehicles, Medical Vehicle, Vehicle Special Transportation, Driving School Vehicle, Hire Vehicle, Tourist Transportation Vehicle and finally the Public Works Vehicle.

In the case of public transport, several companies are represented to facilitate travel at national and international level. We have among others buses, "car rapides", taxi-bush, the Dakar DEM DIKK and the Ndiaga-Ndiaye (big car Mercedes). These vehicles are of type 7 seats, mini bus of 14 places or Ndiaga-Ndiaye of 32 places.

V.4 Focus on public common transport vehicles in Senegal

In the case of public transport, several companies are represented to facilitate travel at national and international level. We have among others buses, fast buses, taxi-bush, the Dakar DEM DIKK and the Ndiaga-Ndiaye (big car Mercedes). These vehicles are of type 7 seats, mini bus of 14 places or Ndiaga-Ndiaye of 32 places.

Graphic7: Diagram of the Public Transport supply



Source:Amadou DIALLO, CETUD (2016)

V.4.1 Dakar Dem Dikk (DDD)

They were born with the arrival of Senbus in 2001 to take over the activities of SOTRAC (late 1990), of which the State is the majority shareholder. They are buses with more than 50 seats and operate a total of 24 routes (12 urban, 12 peripherals) and 14 school lines.

The table below shows performance indicators between 6:30 am and 1:30 pm.

Table 2: Performance of the Dakar Dem Dikk

Performance indicators	Value
Average speed	15km/h

Average interval	15 minutes
Average capacity	90 places

Source:Oumar DIALLO, CETUD (May 2016)

V.4.2 AFTU (Urban Transport Financing Association) Bus network

These vehicles were also born from the project to replace the old fleets of "cars rapide" and Ndiaga-Ndiaye. Thus, from 2006 until now, 1444 new vehicles of Tata brands have been put into circulation with a 60-line operation.

Table 3: Performance of AFTU vehicles

Performance Indicators	Value
Average speed	15km/h
Average interval	15 minutes
Average capacity	43 places

Source : Oumar DIALLO, CETUD (May 2016)

V.4.3 « cars rapides » and « Ndiaga-Ndiaye »

These are former commercial trucks converted into minibuses. For the service, there is a remarkable presence of Ndiaga-Ndiaye in Dakar, Rufisque, KeurMassar and Mbao. The "cars rapids" are also present in the areas of Malika, Pikine and Parsellesassinies.

V.4.4 Taxis and « Taxis clandos »

There are two types of taxis namely licensed taxis and clandos that are unlicensed. Indeed, licensed (yellow-black) taxis have existed since 1967, while the clandestine

(clandestine) taxis have been legalized in 1979 mainly serve Dakar, Pikine, Guédiawaye, Rufisque and ParcellesAssainies. In addition, licensed taxis do not have fixed parking points. In 30% of cases, these taxis are empty at off-peak hours, which affects the fluidity of motor traffic. Concerning the clandos, their operation is close to that of "car rapides" and the "7 intercity places" with identified stopping points and generally fixed rates.

V.4.5 Summary of public transport vehicles in Senegal

The Dakar Dem Dikk Depot, which was 235 until 2016, has seen a net increase recently with the inauguration of 475 new vehicles from Dakar Dem Dikk. So, 710 vehicles of this brand currently operate in Dakar. The AFTU minibus fleet is currently 1444 with 43 seats each while the number of fast "cars rapides" and Ndiaga-Ndiaye is 2000 and can hold between 15 and 30 people.

Table 4:Parc of cars rapides, Dakar Dem Dikk and AFTU 's vehicles in Sénégal

Vehicle	**Total buses in the depot**	Average length of lines
Bus DDD (24 routes)	710 vehicles	21 km
Minibus AFTU (60 routes)	1444 vehicles of 43 places	22.1km
Cars rapides, NdiagaNdiaye and others	2000 vehicles of 30 places	n.c

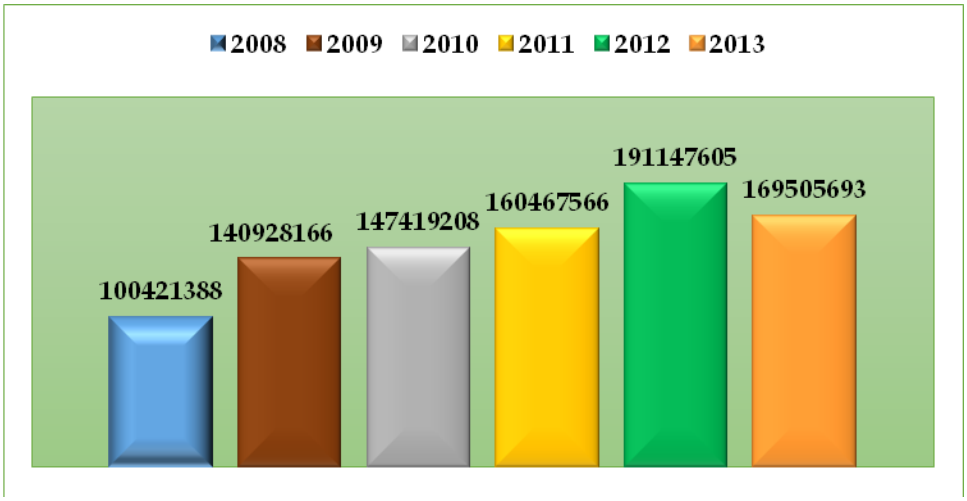
Source : Oumar DIALLO, CETUD (May 2016)

V.5 Developments in trades

V.5.1 Growth in automobile Imports

The high demand for automotive growth by Senegalese shows the high level of its import of vehicles. According to the graph below, we are seeing an upward trend in Senegalese imports from 2008 to 2012 where the value of imports has increased rightly compared to previous years. However, the year 2013 saw a slight decline in terms of imports by value of vehicle, which can be explained by the increase in the age of vehicles from 5 years to 8 years leading to the marketing of second-hand vehicles and inducing a downturn in the new market, especially since used vehicles cost considerably less than new ones. For more details on imports of automobiles by category (see appendices).

Graphic 8: Imports of all types of vehicles from 2008 to 2013 (value in Euro)

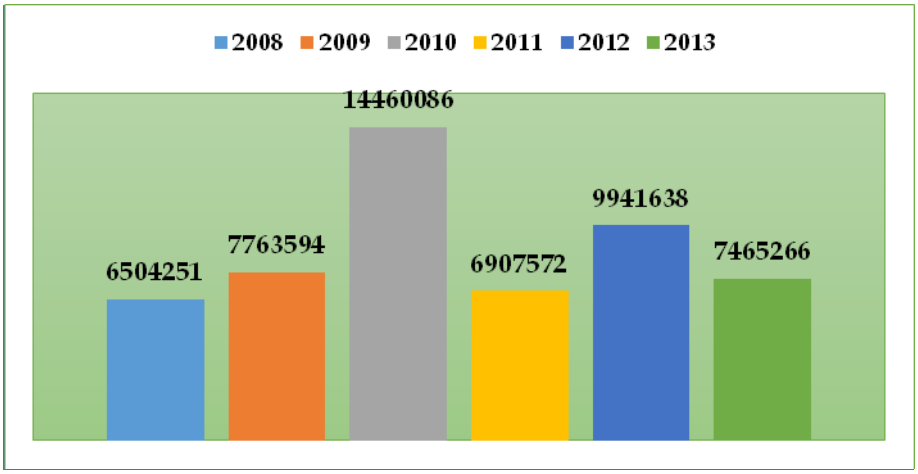


Source : ANSD

V.5.2 Growth of automobile exports

Unlike imports, Senegal's car exports have evolved quite irregularly. The highest export in terms of value is recorded in 2010. This can be explained by the establishment of the Iranian manufacturing plant (SENIRAN) created in 2006 and having promoted the circulation of more than 1500 taxis in 2008. It should be noted that Senegal exports a variety of cars (see Table 4 in appendices). The following graph gives details on the total amount of automobile exports.

Graphic 9: Growth of automotive exports from 2008 to 2013 (value in euro)

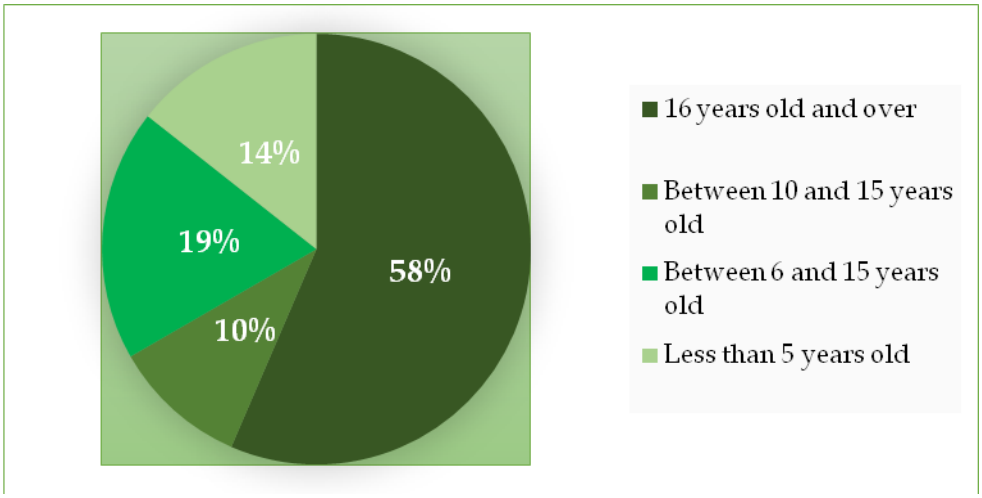


Source : ANSD

VI. Vehicles growth status in Senegal

Despite the laws governing the age of imported vehicles, the age distribution of the Senegalese car fleet shows, according to the aging which we can note at first sight after a few laps on the Senegalese road. Indeed, according to the Direction of Road Transports, cars aged of 16 years and over are 56.5% of the fleet **automobile in 2015.** An alarming number according to the number of accidents attributable to the age of the cars. Vehicles between 11 and 15 years old are about 10.2%, while those between 6 and 10 years of age are about 18.9% at all. The increase in this figure is explained by the change in the age limitation of import cars from 5 to 8 years in 2012. "New" cars, that is, these which been put into circulation during the last 5 years, correspond to only 14.4% et all.

Graphic 10: State of the vehicles in Senegal in 2015



Source: Directorate of the Road Transport

VII. Players in the automotive sector of Senegal

VII.1 Dealers and major car brands in Senegal

A sizable number of dealers operate in the automotive sector in Senegal as shown in the table on the following page. In May 2016, according to Déclic Car Magazine, CFAO and the Senegalese automaker still stand at the top of the dealership with sales of 1094 and 650 vehicles far ahead of Matforce (197), Caetano (185) and Espace Auto (173).

Table 5: Car Dealers in Senegal

Concessionnaire	Tel	Email	Marques automobile	Origine	Marques deux roues	Origine des marques
la Sénégalaise de l'automobile	(221) 33 849 38 32/;	salyservices@yahoo.fr	Mercedes,	Allemagne	Suzuki	Japon
	(221) 33 849 38 30		Mitsubishi	Japon	Piaggo	Italie
	urgence: (221) 77 637 38 23		Citroën	France	Vespa	Italie
			Kia	Corée du Sud		
l'Africaine de l'automobile	+221 33 889 75 00	aacontact@laa.sn	Land Rover	Angleterre		
			Ford	USA		
CFAO Motors	+221 33 849 77	cfaosenegal@cfao.	Toyota		Peugeot	France

Sénégal	77	com		Japon	Suzuki	Japon
					Yamaha	Japon
Caetano Formula Sénégal	(221) 33 849 31 31, 33 832 78 29	info@caetanoformula.com	Renault	France		
			Chevrolet	USA		
			Isuzu	Japon		
Espace Auto	221 33 889 97 00	Not available	Great Wall	Chine		
			Chery	Chine		
			Foton	Chine		
					Dayang	Chinois
EMG Universal Auto	+221 33 869 04 12	info@emguniversalauto.fr	Mitsubishi	Japon		
			Nissan	Japon		
			Mercedes	Allemagne		
CCBM AUTOMOBILE	+221 33 859 08 80	not available	Volkswagen	Allemagne		
Japan Motors Sénégal	(221) 33 848 00 00	info@japanmotors.sn	Nissan	Japon		
Unitech Motor	(221) 33 853 20 35	info@unitechmotors.com	Tata	Inde		
Saudequip		info@saudequip.com	CAT/ CATERPILLAR	USA		
Carrefour Automobile	+221 33 839 86 86	carrefour.auto@orange.sn	BMW	Allemagne		
			Mini Cooper	Angleterre		
			Dodge	USA		
			Fiat	Italie		
			Alfa Romeo	Italie		
			Chrysler	USA		
			Jeep	USA		
			Grand Tiger	Chine		
			Jac	Chine		
			New Holland	New Hollan d		
Senegal Motors	221 33 832 62 82	souleye.ndiaye@senegalmotors.com	Man Truck	Allemagne		
	221 33 832 95 53		Bus AG	Allemagne		
Etoile Automobile Dakar	(221) 33 832 13 36	not available	Man	Allemagne		
MatForce	+221 33 864 95 00	matforce@matforce.com	Hyundai	Corée du Sud		
			mazda	Japon		

Africa Truck Services (ATS)	(221) 33 820 20 30	info@africatrucks.com	Iveco	Italie
SEN-LOC PRESTIGE	+221 33 867 86 49	not available	mercedes	Allemagne
			nissan	Japon
			peugeot	France
			bmw	Allemagne
Expert Auto	(221) 33 859 68 68 - 77 503 90 99	expertautosa@hotmail.com	Multimark	

The dealers mentioned above sell a variety of brands including BMW, Mini Cooper, Dodge, Fiat, Alfa Romeo, Chrysler, Jeep, Grand Tiger, Jac and New Holland, Iveco, Tata, Great Wall, Chery, Foton, Dayang, Mitsubishi, Land Rover, Renault, Chevrolet and Isuzu, Toyota, Peugeot, Suzuki, Yamaha, Hyundai, Mazda. These fairly diverse are of European, American or Asian origins.

Toyota, Ford and Mitsubishi are the most widely used brands in Senegal. In addition, a recent report by SCIMPEX (2015) ranks Mitsubishi ahead, followed by Toyota and Ford.

Source: Afric'affaires Magazine (2013)

From another point of view, we note that among these multiple vehicle dealers there are few who are official and some of the distributors of new vehicles approved by the manufacturers. These are the ones that are privileged by public enterprises, as private, due in particular to the guarantee of 2 years, usually accompanying their offers. Thus, LA SENEGALAISE DE L'AUTOMOBILE, officially representing four (4) major brands, remains the leader of new car dealers with a market share of 26.6% in 2015 for a sale of 1670 units on the Compared to 29.36% in the previous year.[7]

Source: SCIMPEX (2015)

The NECOTRANS and BOLLORE groups are also present in Senegal in terms of transport. The country also has a vehicle assembly company in Thiès. These are the mini bus commonly known as TATA: Indian manufacturer.

[7] http://intelligence-affaire.com/etat-du-secteur-automobile-au-senegal/

Classification of trademarks in May 2016

Toyota remains the best-selling brand according to the sales balance for the month of May 2016. According to this magazine, the top ten (10) After Toyota, Toyota Prado, Toyota Land Cruiser, Kia Sportage, Mitsubishi L200, Toyota Rav4, Mitsubishi ASX, Ford Figo, Mitsubishi Pajero Sport and finally Citroën C4 Aicross.

Source: Déclic car (2016)

Talking about the sellers of spare parts, the list is quite long. Indeed, there are several hundred sellers of car spare parts in Senegal. The main ones are shown in the following table.

Table 6:Main spare parts dealers in Senegal

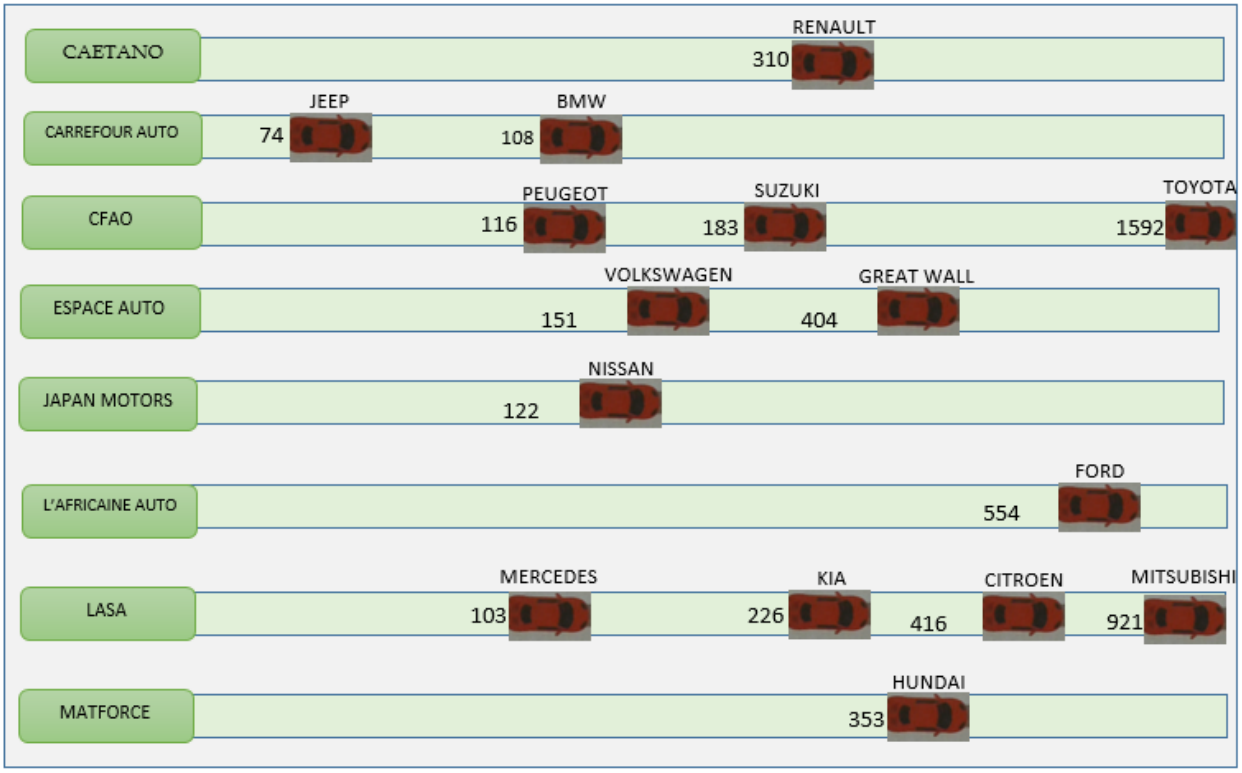
Society	Adress	Tel (00221)
SENEGAL NEGOCE	5, Rue Felix Eboue Dakar E-mail : opsn@orange.sn	338221165 Fax : 338881352
Africa Pièces détâchées	Km 21 Route de Rufisque keurmbayefall E-mail : amarsylla2000@yahoo.fr	338700732 / 776381689
Jeep team Africa	29, Route Du Front de Terre, GRAND-YOFF, DAKAR	338674006
Societe Import Export de pieces Automobiles (SIEPA)	62 Avenue Lamine Gueye, Dakar E-mail : siepa@orange.sn	338212534 Fax : 338212156
Sen Pieces Auto SARL	102 Avenue Blaise Diagne, Dakar E-mail : senpiece@orange.sn	338228387 Fax : 338227883
Espace Auto	Avenue Lamine Gueye prolongee X Rue Marchand, Dakar espaceauto@ccbm.sn	338421817 338496549 Fax : 338421817
GALAYABE MOTORS	Rue Dial Diop x Rue Ambroise MendyReubess Dakar	338239920 / 772386913
WAKEUR KHADIM SARL	106 Avenue Blaise Diagne Dakar E-mail : Wakeurkhadimsarl@orange.sn	338422736 / 775274071/ 338231383/ 338422730 Fax 338231383
SociétéThiaroye Automobiles	kilomètre 6,5 Boulevard de Centenaire de la Commune de Dakar ex-Route de Rufisque E-mail : sta@orange.sn	338323341 Fax : 338320140
LA SENEGALAISE DE L'AUTOMOBILE	2,5 Km Boulevard du Centenaire de La commune De Dakar e-mail : dc@lasar.sn	338493838 Fax : 338493845
EL CORDOBES	PARCELLES ASSAINIES	338531017

DAROU SALAM	, Rue TSM 602, THIAROYE SUR MER, PIKINE	338347839
DAKAR DIESEL SERVICES	Medina Rue 11 x 12 info@gas.sn	338211151 / 776635221
AFRIQUE PIECES AUTO	Route de Ngor	781174343
SENAUTOZONE	31 bisliberté 6 extension, dakar	338674547
SCORPION AUTO PARTS	Route du MeridienPresidentAlmadies	301189999 / 771783641
FROID AUTO CENTENAIRE	FassBatiment en Face Obelisque Dakar azizdiengfac@gmail.com	338227948 / 776498940
ETS FAOUZI EL SAYED	5 Rue Felix eboue x Autoroute Dakar	338211242
KER SYLLA	Km 11 Route de Rufisque	338344889 / 338372888
ENTREPRISE KEUR SECK	Km 11 Route de Rufisque	338530291
AUTO PARTS SENEGAL SARL	7,5 Km Boulevard du Centenaire de la Commune de Dakar	338328816
L'AFRICAINE DE L'AUTOMOBILE SA	30 Avenue Président Lamine Gueye Dakar	338897500
ESPACE SCOOTER	Rue 39 x Bd General De Gaulle Dakar	338212960 / 776516644

- **Classification of the 15 most sold trademarks in 2015**

As we can see on the chart below, in 2015 Toyota remains the most sold brand in Senegal with a total sales of 1592 new vehicles. Then comes Mitsubishi with 921 sales far ahead of Ford which records 554 sales. Citroën and Great Wall occupy respectively 4th and 5th place with respectively 416 and 404 quantities sold. In addition, brands such as Jeep, BMW and Mercedes occupy respectively 15th, 14th and 13th place on the 15 most sold brands in 2015 with respectively 74, 103 and 108 sales.

Graphic 11: Top 15 best selling of brands in 2015



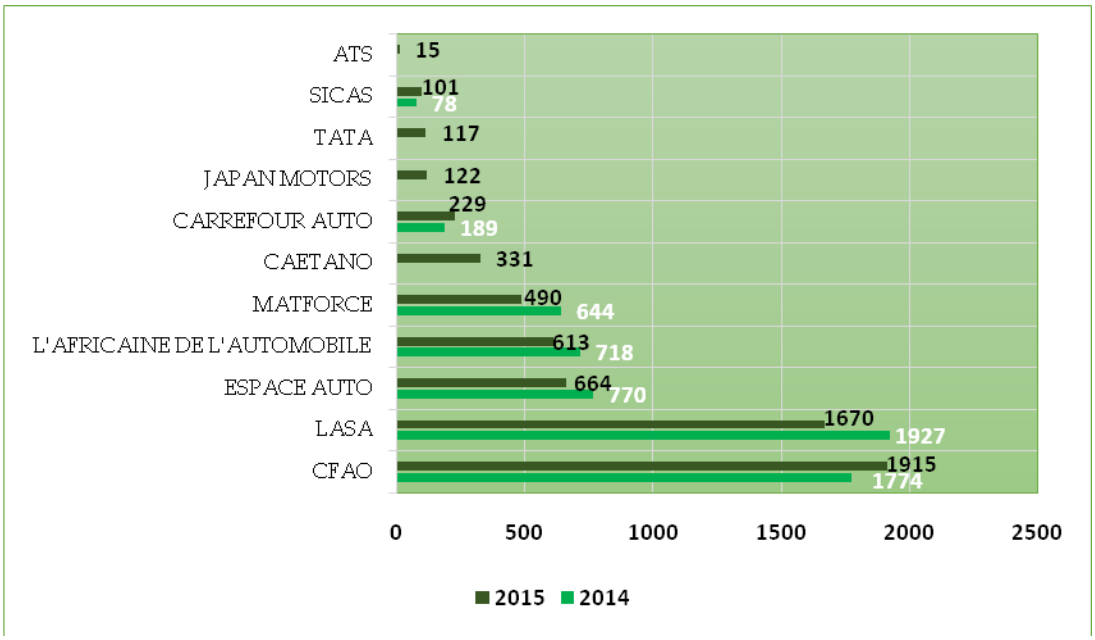
Source: Déclic Car, May 2016

VII.2 Trends of sales of new vehicles per dealer between 2014 and 2015

The Senegalese Automobile (LASA), which was the leader in terms of sales (in volume) in the year 2014 with 1927 new vehicles sold followed by CFAO which records 1774 sales, saw its sales fell in 2015 to 1774, placing it in second position behind the CFAO which becomes leader with 1915 sales. Espace auto retains its third place with 770 sales in 2015 against 664 in 2014. The chart below illustrates the different developments according to the 11 main car dealers in Senegal.

Graphic 12: Trends of Sales per dealer between 2014 and 2015

Institut de Sondages et d'études de marchés, Société(BDA)
Point E – Rue de louga X Rue 8 – Tél : 33 825 68 55 – Email : bda@institutbda.com – Web : http://www.institutbda.com

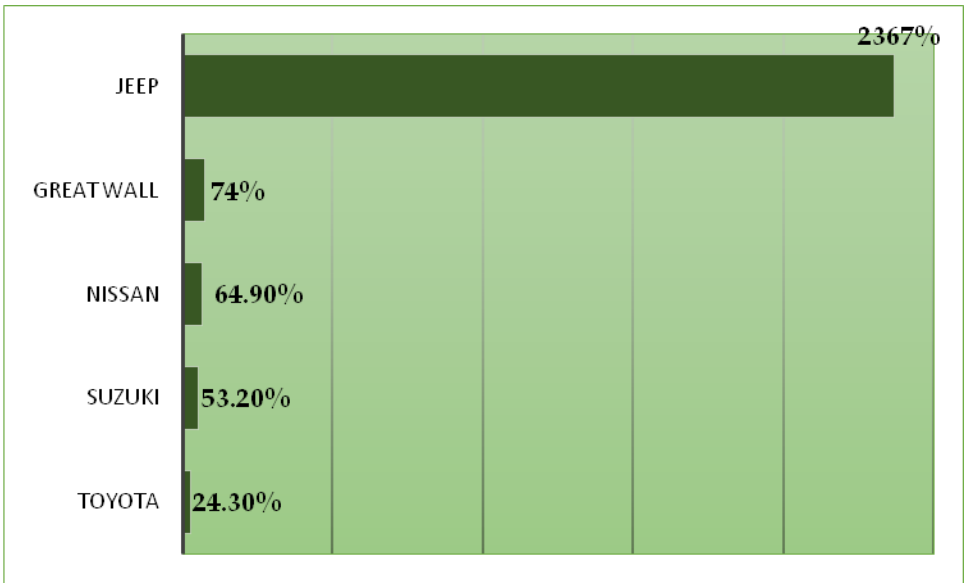


Source: Declic Car, 2016

VII.3 Top 5 of the sales growth by vehicle brand between 2014 and 2015

In terms of evolution (see next chart), Jeep experienced an incontestable boom between 2014 and 2015, multiplying its sales by 25. This brand grew by 2367% between 2014 and 2015. After JEEP, Great Wall also registered a good year 2015 with a growth of 74% in front of Nissan which shows a growth of about 65%. Suzuki and Toyota ranked last in terms of the 5 strongest growths with respective rates of 53.2% and 24.3%.

Graphic 13: Top 5 growth by brand between 2014 and 2015



Source:Declic Car, August 2016

VII.4 Dealer Business Strategies

The intensity of competition in the automotive sector leads dealers to develop well-founded strategies. Indeed, some dealers (Senegalese automotive, automotive EMG etc.) adopt a method of marketing several brands from different origins. Similarly, in order to facilitate the purchase of vehicles, credit sales are made authorizing the payment per tranche over a fixed period. In addition, guarantees are granted on sales and accompanying measures are also undertaken by dealers to attract their customers.

VII.5 Focus on assembly units in Senegal

VII.5.1 SENBUS

Established in 2001, Senbus Industries is a Senegalese company with a capital of 2 billion CFA francs, of which 7% is held by the State of Senegal.

It is the industrial partner of the State of Senegal for the renewal of the minibus fleet in the region of Dakar, but also for the acquisition of vehicles for interurban transport and urban transport in the regional capitals.

It should be noted that the relations between the State and Senbus Industries started in 2002 thanks to an international call for tender launched for the cover of public transport on behalf of the Association for the financing of urban transport (AFTU).

In the aftermath of the 2000s, the Senegalese government had decided to replace the picturesque "fast buses" and the old Saviem trademarks that served as common transport. Thus, in search of a financial partner to rely Indian industry auto major TATA, to provide the same technological advantages built the assembly line on World Bank funding. Chinese Bank Eximbank, in collaboration with the Senegalese State has developed a program of assembly Of 406 minibuses, which was also assembled in the same line. The Assembly plant is functional and is an example of Indian cooperation for industrial transfer of technology and employment generation.

The plant, known as Senbus Industries, has a production capacity of 1,000 vehicles per year and installs 32 and 61-seat Tata buses on behalf of an Indian industrial group. The implementation of this project by former President Abdoulaye Wade required an investment of 5 billion CFA francs (8.5 million US dollars), according to its promoters. Its capital is held by private Senegalese (93%) and the State of Senegal (7%). According to President WADE, Senbus Industries is a sub-regional factory whose mission is to contribute to the strengthening of the economic integration of West Africa. He says: "In our mind, Senbus must be a sub-regional enterprise for the sub-regional market.

We intend to share with the countries of the sub-region the benefits of offshoring and technology transfer, "he said.

At the celebration of 15 years of SENBUS, AliouneThiam, Director General of the Executive Board of Urban Transport in Dakar (CETUD), revealed that the industry has replaced 1,857 vehicles, of which 250 in the Thiès, Saint-Louis, Louga, Kaolack, Tambacounda and Ziguinchor regions, for a total amount of 41 billion francs CFA (62504097.1 €).In addition, he argues that, with the fleet renewal program, "the national economy has been able to benefit from a higher value compared to the situation in which the vehicles were imported directly".

Moreover, for the Director of CETUD, "Beyond the import taxes, the assembly of vehicles in Senegal has produced very significant socio-economic benefits".

As for the general manager of Senbus Industries, Cheikh Sadibouh Diop, he said he was "proud" to accompany Senegal in the renewal of urban transport. He highlightedd that the assembly of vehicles has created 300 direct jobs. According to him, the payroll reached 5 billion CFA francs (7,622.5 €) between 2005 and 2015 for a volume of 900 million people transported.

VII.5.2 SENIRAN

Founded in 2006 under the joint initiative of Senegal and the Islamic Republic of Iran, SENIRAN AUTO is involved in the production and sale of various types of vehicles, with an annual capacity of 10,000 vehicles. It asserts itself as the leader of the automotive industry in West Africa. In order to meet the demands of the automotive market, SENIRAN AUTO has set up a factory with the latest generation of infrastructure in the city of Thiès, located 70 km from Dakar.

To achieve its objectives, the company has set up infrastructures comprising the various production and marketing units:

- Receiving and storing equipment
- A body shop
- A body painting workshop
- A workshop for assembly and assembly
- A quality control workshop adapted to all production lines
- A distribution center
- A showroom in Dakar for the sale of SENIRAN AUTO products
- After-sales service in Dakar and Thiès to anticipate difficulties in supplying spare and repair parts

Since the beginning of its operation in 2008, the company SENIRAN AUTO has contributed largely to changing the Senegalese automobile landscape by participating in the renewal of the taxi fleet. Approximately 1500 taxis are available to the market and a large fleet of passenger cars is sold.

It should be noted that SENIRAN AUTO's greatest pride lies in the transfer of advanced technology, which translates into:

- The increase in the level of industrialization in SENEGAL
- The training of some thirty Senegalese engineers and technicians in IRAN

SENIRAN AUTO SA is positioning itself as a major partner in the creation of jobs for Senegalese youth. It is in this sense that a call "to consume Senegalese" is launched to the public and private sector to meet the development challenges that await Senegal.

VII.6 Financial partners in the automotive sector in Senegal

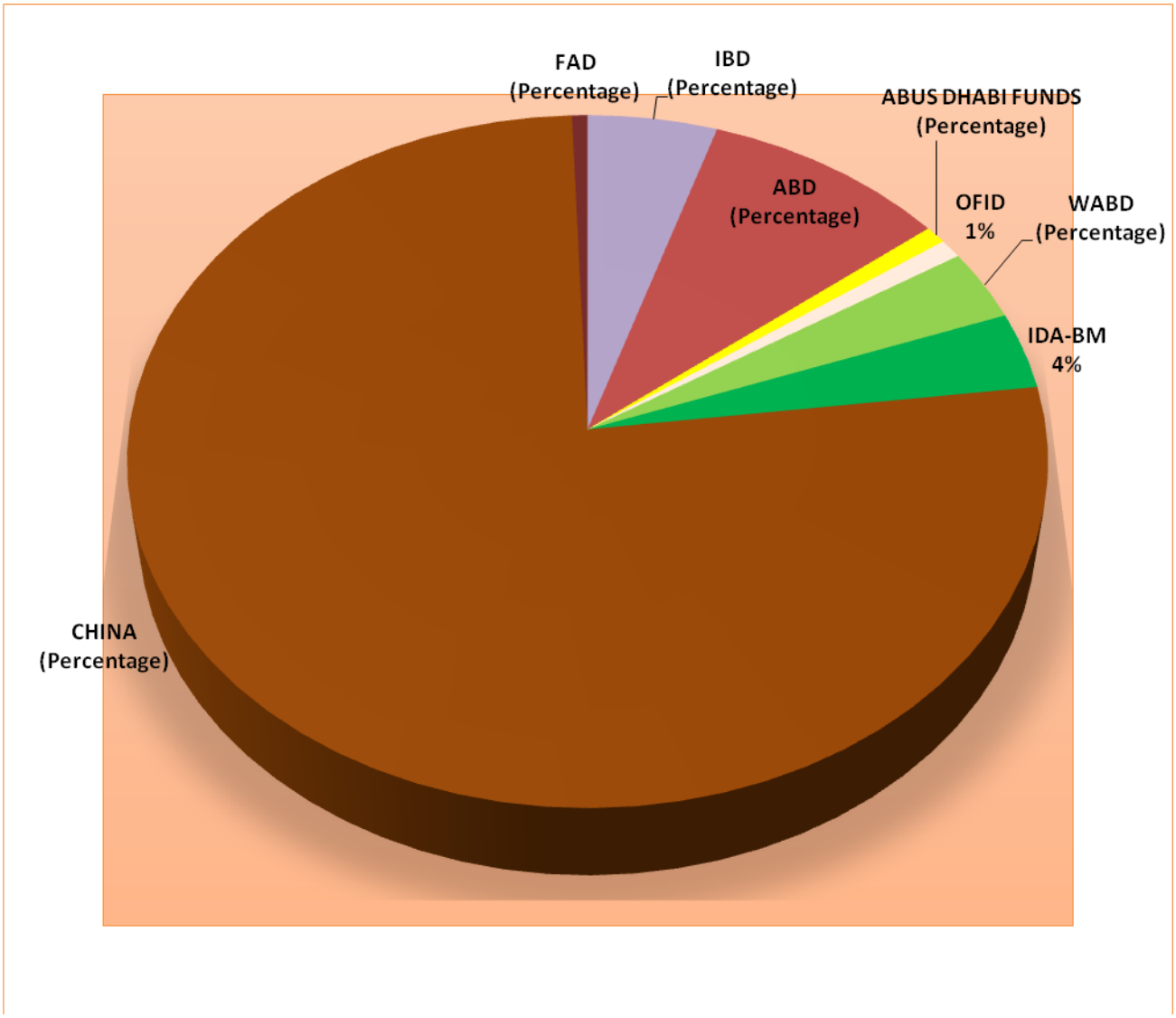
VII.6.1 Banks and microfinances in Senegal

Quite a few are the banks and microfinances that accompany companies and those who wish to acquire new or used vehicles in Senegal. Among these banks, the main ones are: SGBS (SociétéGénérale des Banques in Senegal), BISIC through its "Auto Credit", CBAO, BanqueAtlantique, BanquePopulaire (thanks to its "Personal Loans" program) , BanquePostale, Ecobank, BCEAO, BSIC, Bank of Africa (thanks to its program "Loan my car"), microfinance MANKO with its "credit Suxali" program.

VII.6.2 International donors

The Senegalese automotive sector is also supported by international institutions and donors who are willing to support the country in its development projects. As the chart below shows, China is a major financial partner of the automotive sector in Senegal. Indeed, Chinese investment in this sector represents 76% of total investment. BAD (African Development Bank) comes second with a 9% share followed by IDB (Islamic Development Bank) with 5%, IDA-BM (4%), BOAD (3%) AFD, ABUS DHABI FUND and OFID, each with a 1% share in the total investment.

Graphic 14: Amounts invested in automobiles according to financial partners



Source: Revue sectorielle 2016/MITTD, cited by Oumar DIALLO

The following table shows the amount of investment from the main automobile donors in Senegal. A total of 841,000,000,000 FCFA (US $ 1,401,666,667) is invested in the transport sector of this country. The smallest amount invested comes from FAD (French Agency of Development).

Table 7: Amount of investments in the automotive sector

Donors	Amount Scheduled (in FCFA)	Amounts in Dollar ($)
IBD[8]	41 900 000 000	69 833 333
ABD[9]	79 200 000 000	132 000 000

[8] International Bank of Development
[9] African Bank of Development

ABUS DHABI FUNDS	7 000 000 000	11 666 667
OFID[10]	7 500 000 000	12 500 000
WABD[11]	28 000 000 000	46 666 667
IDA-BM	30 000 000 000	50 000 000
CHINA	643 000 000 000	1 071 666 667
FAD	5 000 000 000	8 333 333
Total Investment	841 000 000 000	1 401 666 667

Government of India had extended a line of credit in February 2005 valued at US $ 18.87 million for the supply of 350 buses and 85 pick-up vans to the Government of Senegal. The buses were used by Dakar Dem Dikk for urban connectivity and the pick-up vans by other government entities. Another Line of Credit for US $ 26 million is to be signed between India and Senegal for supply of transport vehicles for interurban, international and inter-regional connectivity.

Source: Revue sectorielle 2016/MITTD

VII.7The automotive users in Senegal

According to the ANSD, Vehicles are the main means of transport for people and goods in Dakar.

Implementation of the 2003 law created a highly competitive environment in the automotive market with the arrival of diversified constructions at prices accessible to users. Note that vehicles are mostly sold to private companies followed by individuals and finally to the administration.

Nowadays, one must note a relief of the users with increase in number of buses in city transport, buses have been regular and providing dependable public transport. In addition to this, there is an "Allo Taxi" system, like the Dakar / Saint-Louis route, where you are picked up at your home and dropped off directly at your destination. In addition, some private transport facilities have air-conditioned buses. This is for example AlAzar, the starting point of which is the Shell station facing the fire brigade named (Pompier).

[10]OPEC Fund for International Development
[11] West African Bank of Development

VIII. Preference of brands, their popularity and the most used brands of vehicles

VIII.1 Preference for vehicle brands in general

If most Senegalese motorists drive in French cars such as Peugeot and Renault, their preferences will nevertheless go to the Asian (Toyota) and German (Mercedes) and 4 × 4 type vehicles.

Source: l'observateur (2014)

Otherwise, it turns out that the Senegalese love the cars, especially the large displacements. According to a sample of 900 motorists surveyed by Synchronix in the Dakar, Thiès, Diourbel and Saint-Louis regions in March 2014, 20.9% said they preferred Toyota vehicles. It is followed by the German Mercedes brand, which has a preference rate of 19.2% and then Peugeot which completes the podium with 15.1% as a preference rate whereas this rate is 13.1% for Renault. BMW completes the top 5 favorite cars. Other brands, such as Ford, Tata, Citroen, Kia, Nissan, Mitsubishi ... come next, and Hyundai closes the loop.

According to the gender of the interviewees, the survey indicates that if men have a preference for Toyota and Mercedes, women prefer BMW and second place Toyota. As such, one is tempted to affirm that the Japanese-German couple has won the hearts of the Senegalese. On the other hand, Toyota is the favorite brand of drivers (40.5%) while for individuals, they prefer Mercedes (18.5%).

On the other hand, despite their fulgidity and their very fashionable appearance, the Hyundai and Kia brands are experiencing some difficulties to break through and settle into the top brands of favorite cars of the Senegalese, according to the study.

Moreover, the report makes it possible to affirm that the Senegalese love the big cars. The preferred car type of Senegalese is by far the 4 × 4 type, according to 50.6% of motorists surveyed. Second are the 4 × 2 (20.2%) and the Berline (19.3%). A 9.9% of the sample is the Senegalese who have a preference for 8 × 8 cars.

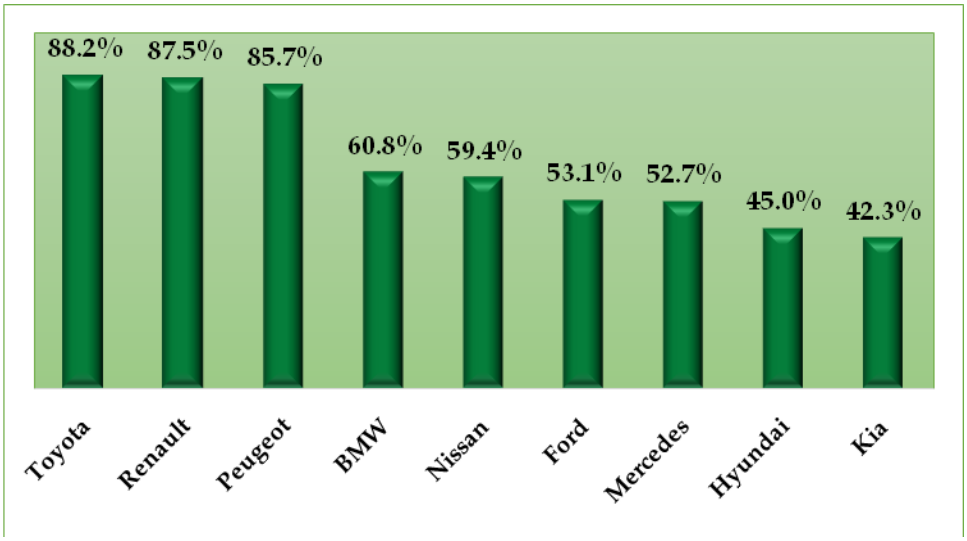
Source: l'observateur, by Dieng (2014)

VIII.2 Popularity of various brands

Favorite brand, Toyota also wins the fame of popularity. This is the best known car in 88.2% of the sample, followed closely by Renault, with 87.5%. Next came Peugeot with 85.7% and BMW with 60.8% (see chart below). Mercedes is the second most favored car brand, with 52.7% fame, ahead of Nissan (59.4%) and Ford (53.1%). The emerging brands Hyundai and Kia are 45 and 42.3%, respectively, and rank 10th and 11th in the ranking of the best-known car brands. The survey shows that Asian cars are well known, as are European (French and German) cars, while American brands are not well known by Senegalese.

Source: Synchonix (2014), cited by Dieng.

Graphic 15: Popularity of automotive brands



Source :Synchonix survey (2014)

VIII.3 Most used car brands

As far as Toyota is the best known car brand, the Senegalese majority drive the French brands. 21.5% of the sample drive Peugeot or Renault (19.6%). The preferred Toyota are driven by only 10.4% of respondents, while Mercedes, who rank second

in the list of preferences (19.2%), are also driven by the same share of the sample, 10.4 %.

Source: Synchronix, cited by Dieng (2014)

IX. Focus on international Fairs/Exhibitions

Each year, Senegal organizes an international trade fair to bring together the main players in the automotive sector and to discover even more the vehicle market that has been booming for a decade. Launched in 2011 at the initiative of a few enthusiasts, the international fair all-terrain has become the inescapable Trade Fair in Senegal. Over the years, this event has grown steadily, and today it has acquired an undeniable fame among professionals and amateurs in all countries of West Africa.

Unique in its kind, it is a great static and dynamic exhibition, to give all players in the world of off-road:

- The opportunity to discover appropriate vehicles and equipment.
- To popularize the promotion and development of 4x4 and all motorized recreation.
- To convey and highlight a positive image of these vehicles increasingly respectful of the environment.
- To offer everyone the opportunity to indulge in the joys of off-road driving.
- To contribute to the development of the economic, tourist, sports and social activity of the country.

The program retains a static display, introducing new products/brands, demonstrations, free practice areas, initiations and discoveries, specialists of all brands, , a sales area New and used cars, a space "Bivouac", a space refreshment and restoration, and many Animations.

Automobile Dealers, Truck Dealers, Travel Agencies, Rental Agencies, OEMs, Accessories, Tires, Garages, Motorcycle Dealers, Quad and SSV Dealers, Insurance, Banks, Oil companies, associations and clubs enthusiastically participate in the Fair.

X. The internet, a powerful tool for automotive users

According to the survey by the Carmudi dealer (2015), about 37.5% of car buyers in Senegal say they turn to the Internet, especially via the sites of builders, to do research on cars. In addition, the majority of dealers specify that more than one-third of their customers use the internet and online ads for their automotive search. In Senegal, the main online car dealers are Carmudi and Expat Dakar.

Even though there is a gradual shift towards online media, more traditional off-line media such as automotive magazines and direct visits to the vendor are still very important with 50% of buyers in Senegal using these two sources before buying a car. In addition, car dealers and sellers are increasingly present on the web to promote their offers. Thus, about 45% of sellers mainly focus on the Internet to promote their ads. They are also increasingly using social media to create a real relationship with their customers.

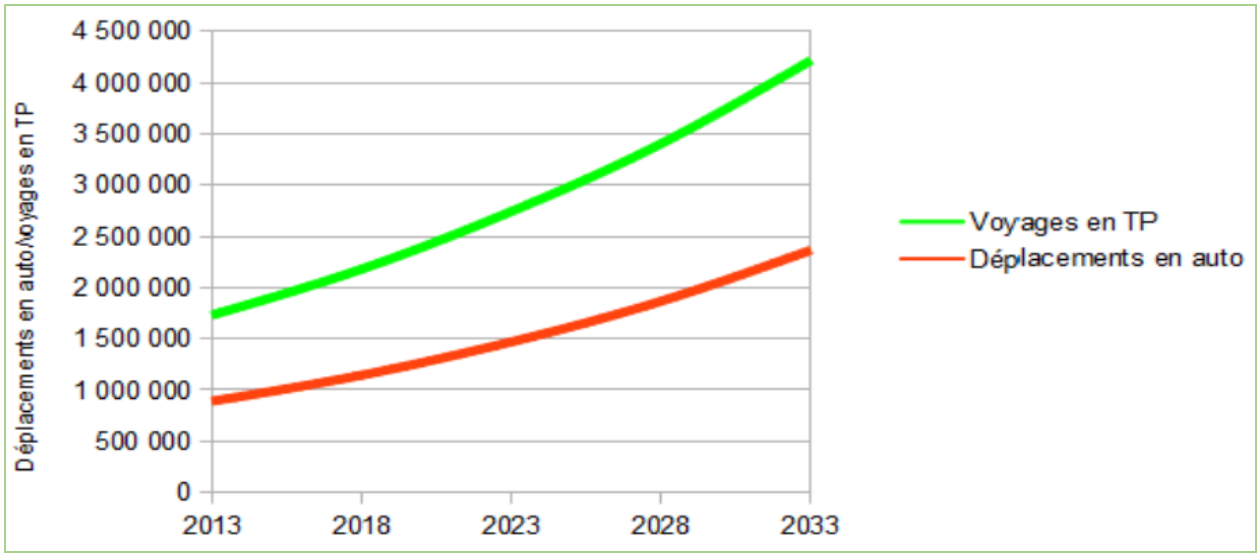
XI. The automotive sector outlook in Senegal

In general, 25% of car buyers in Senegal have planned to buy a new car in the coming year and more than 62% of them plan to buy their next car within the next two years. The automotive industry in Senegal remains relatively strong in the sub-region.

Source: Carmudi (2015)

The following graph shows the projection of the use of the automotive and public transport in Senegal between 2013 and 2023. There is an increasing demand throughout the period especially with travel by public transport. This shows good prospects for car dealers and investors.

Graphic 16: Projection of the use of automotives and public transport



Source : Oumar Diallo, CETUD (May 2016)

XII. SWOT Analysis of the Automotive Market in Senegal

The following SWOT analysis shows that Senegal presents several key points to welcome investors wishing to operate in the automotive industry. Indeed, political and institutional stability constitutes a indispensable requirement for the economic development of a country. It promotes the attractiveness of investors and therefore favors the creation of employment, wealth and stimulates economic growth.

Also, Senegal is a country which is widely opened to the outside through the several free-trade agreements signed with its partner countries and other developed countries (WAEMU, ECOWAS, UNCTAD, WTO, AGOA etc.), which contributes to a facilitation of the transactions of the marketed goods and services.Thanks to these agreements, Senegal can export to its neighboring (subregional) countries, the EU and the US (with the AGOA Treaty) without paying export taxes. This is an excellent asset for any investor who wishes to operate on the national territory. In addition, the efforts made in recent years to strengthen road infrastructure have changed the landscape of the country. So, the country is endowed with several tarred roads, with highways and interchanges. Railway construction projects connecting Dakar to other

cities of the sub-region such as Abidjan, Mali are also in progress with the support of the investors (public-private partners).

To these forces, there are also a number of opportunities, in particular the increase of the age limit for imported vehicles to 8 years instead of 5 years. Senegal is a country that already has two automobile assembly plants, thus reflecting its strong support for North-South technology transfer. The continuous growth in demand for automobiles requires not only the presence of vehicle suppliers but also the establishment of industrial units to strengthen the capacity of local production.

This production could satisfy both national and sub-regional demand, especially as it would help to reduce transaction costs and thus facilitate exchange between countries.

Nevertheless, the insufficiency of financing (lack of credit for the automobile and the low level of income), the low level of mechanization in the country (lack of quality mechanics), the low level of equipment are among the weak points And constitute non-tariff barriersof the automotive market in Senegal. In rural areas, the primary roads state also does not encourage motorists to buy any type of vehicle. For example, in some villages, road conditions lead to the use of 4X4 vehicles to make taxis, which is not the case in cities.Also let us note that the industries of production are not yet mature in terms of competitiveness towards the other African producers (Morocco, Egypt, South Africa, Nigeria, Ghana and Kenya).

From another point of view, several threats also constitute non-tariff barriers of the automotive market in Senegal. The strong competition between the dealers, the price war and the informal market of the occasion that escape formal dealers (like CFAO, Senegalese Automobile, EGM Automobile etc.) constitute important threats which it is necessary to underline. Also, in rural areas, one of the main difficulties in the marketing of vehicles is the non-adhesion of the population to other types of vehicles in the favor 4X4 because of the state of the roads (because, according to these rural people, 4X4 is a vehicle passes everywhere[12]).

[12]Déclic Car, août 2016

Besides, corruption at customs area, especially regarding taxes on vehicles, may also impinge on the entrance of investors in the automobile.

However, there are several opportunities in this booming market for more than a decade. Senegal, like all countries in the sub-region, undoubtedly needs the transfer of technology to ensure the development of their economies. So, the presence of a foreign structure operating in the automobile constitutes an opportunity for Senegal in terms of technology transfer and access to a new market by the investor. Furthermore, the new regulations on the age of cars are clearly a strong point on which dealers can count on their projects.

Graphic 17: SWOT Analysis of the Automotive Market in Senegal

STRENGTHS	WEAKNESS
1. Institutional, political and macroeconomic stability 2. Opening on the outside by several Free trade agreements 3. Existence of road infrastructures 4. Strong attractiveness of the country 5. Strong potential of development 6. Existence of Assembly Plant	1. Lack of financing 2. Low level of mechanization 3. Low level of equipment 4. Low degree of competitiveness 5. Weak perception (notoriety) of the brands 6. Lack of rigor in regulation 7. Lack of road in rural area 8. Lack of Parkings 9. None Availability of GNG
OPPORTUNITIES	**THREATS**
1. Emergence of the automotive market 2. Technology transfer 3. Access to the new market 4. New regulations on the age of Imported vehicles 5. Availability of financial partners	1. Strong competition 2. Taxes on vehicles 3. Price war 4. Reluctance of actors / population 5. High degree of uncontrolled informality 6. Preference of KTM and Peugeot

XIII. Opportunities for Indian brands

India has played a significant role in the transport sector in Senegal through the assembly of TATA-brand vehicles that has been providing public transport at national level for years. These buses of Indian brand are assembled in the assembly industry Senbus located in Thiès. The projections show an upward trend in transit demand by 2023, hence the need for more vehicles for anticipatory purposes.

Source :Oumar DIALLO, CETUD (2016)

Furthermore, since the increase of the age of vehicles imported for eight years, Senegal has a boom in used cars. So, India can take advantage of this opportunity and assert its brands on the Senegalese territory especially as the projections for the next years reveal an increasing demand in automobile as well in public transport and private owned vehicles. For that purpose, India can right now participate in the various Car Shows, not only of Senegal but also sub-region to make its brands known in motoring terms.

In rural areas, India can target the vehicles of types 4x4 which are favored due to the state of roads. If possible, an assembly plant can be considered to facilitate the entry at national as international level especially as these kind of vehicles are enough used in the sub-region. Currently there is no manufacturing or assembly facility in the region for 4x4 vehicles.

On the agricultural sectpr, Senegal is a country where the agriculture is a leading sector. Nevertheless, there is a shortage of approx 15000 tractors while this country aspires to the emergence. The Indian industry can then deal with this aspect by sales and also considering assembly lines to cater to other African countries, or being represented by a dealer who will insure the marketing of the tractors of Indian origin.

Indeed, it is important to emphasize that setting up a tractor assembly plant in Senegal is a first and will considerably reduce the transaction costs of this type of vehicle. This, in turn, will enable this industry to achieve a significant turnover.

In addition, Senegal plans to replace the "cars rapides" with new minibuses by 2018 to ensure public transport. To this purpose, a program for the renewal of the Dakar bus fleet has been set up. Thus, for each "car rapide" removed from traffic, the private carrier receives a bus with a unit price of 18,700,000 CFA francs, which is deducted from the government contribution in the form of a scrapping premium of 2,000 000 CFA francs. The balance of the credit (16,700,000 CFA francs) is spread over 60 months.

Therefore, "if all the conditions are met, there should no longer be" fast buses "in circulation at the end of 2018"

Source: Alioune THIAM, Director General of the Urban Transport Executive Center in Dakar (Cetud)

Indian industry can take advantage of this situation and position itself to increase its share in vehicles replacing cars "rapides". Also, through the different free trades agreements between Senegal and its neighbors in the subregion, the vehicles produced can be exported to the countries of the subregion without payment of taxes, as should be the case.Similarly, Senegal exports its products freely to the European Union, what is an opportunity for a company wishing to establish itself on the territory. This is the same for the exportations to the US through the African Growth Opportunity Act (AGOA), which was recently extended to 2025.

In addition, India can also strengthen the Thiès taxi plant by setting up a second plant. This will make it possible to revitalize Senegalese road transport and thus contribute to the completion of the PSE (Emergent Senegal Plan), in view of the role played by transport in the economic development of a country.

XIV. Conclusions and Recommendations

Senegal is a country where the automotive market is booming. Nowadays, several dealers operate in the territory and sell several brands to answer the growing demand of the population in terms of automobiles. The dealers who draw the Senegalese market are the Senegalese of the automobile and the CFAO which alone have more than 60% of the market share of the Senegalese automobile in 2015 (Déclic Car, 2016).

But in general, this market is doing well with a growth of 12.45% in May 2016 compared to the previous year. It is also favorable to the entrance of the other dealers to strengthen the actors of this domain and contribute to the success of the "Plan Emergent Senegal" (PSE) through the creation of employment, as it is the case with SENIRAN and SENBUS. However, in order to infiltrate this market and attract

consequent market shares, several measures must be implemented. Specifically, they are:

- Play on the preference and the taste of Senegaleses regarding automobile. As highlighted by the Synchronix survey, Senegalese have a preference for the big cars. The most preferred brands are Toyota, Mercedes and BMW. Besides, for the most part, we have Peugeot and Renault brands.

- The new entrant must also play on the price so as to be able to cope with competition.

- In order to minimize the cost of imports, it is important to set up vehicle assembly plants on the territory in order to provide unbeatable prices not only to nationals but also to neighboring countries which, like Senegal, in automobiles.

ANNEXES

Table 8: Evolution of the imports of automobiles from 2008 till 2013

	2008	2009	2010	2011	2012	2013
Common Transport vehicles	6810446	7134967	5658488	6861803	24859050	11897120
Vehicles of snow, golf and similar	14830	46980	13151	13457	13497	534
Fuel Vehicles	0	48115825	43744389	45282430	49427557	47305284
Diesel vehicles	11766802	11391276	11805228	18499654	10567911	18250688
Other vehicles for passenger transport y.c. breaks, racing cars	353393	1040455	447519	785113	466391	250974
Trucks	55860932	45199023	58193137	57002489	73610856	64255850
Fire-fighting car	508542	0	103713	98692	506599	293040
Concrete mixers	1661258	773526	927609	490863	681370	1054487
Other motor vehicles for special purposes, passenger transport n.c	7043393	8309042	5822180	13412327	10433714	6159643
Vehicle frames	3211962	4203282	3373315	552150	1119981	2717000
Motorcycles	5003258	4856177	6352195	6400141	7287077	6497667
Bicycles and other cycles (y.c. delivery tricycles) without engines	418419	398527	426302	342085	338154	289329
Trailers and semi-trailers	7768154	9459086	10551984	10726361	11835447	10534078
All	**100421388**	**140928166**	**147419208**	**160467566**	**191147605**	**169505693**

Source : ANSD

Table 9: Evolution of the imports of automobiles from 2008 till 2013

	2008	2009	2010	2011	2012	2013
Common Transport vehicles	680957	952173	304032	355404	175410	317407
Fuel vehicles	1440776	1889149	2354814	1889542	1738449	1984402
Diesels vehicles	600477	374390	586615	464061	379718	886437
Other vehicles for passenger transport y.c. breaks, racing cars	133815	796346	478089	291852	472610	421457
Trucks	1965515	2866524	7190104	2716629	5282797	2013772
Concrete mixers	109112	89210	426436	36125	57562	178669

Other motor vehicles for special purposes, passenger transport n.c	861840	113799	1157777	510947	400008	485188
Motorcycles	167042	331829	302070	171100	219576	265707
Bicycles and other cycles (y.c. delivery tricycles) without engines	15986	1253	3886	522	3157	2652
Trailers	528732	348921	1656264	471391	1212352	909574
Total	**6504251**	**7763594**	**14460086**	**6907572**	**9941638**	**7465266**

Source : ANSD

Table 10: News vehicles argus in Senegal

NOUVEAUTÉ
À VENIR E = Essence D = Diesel G = Gaz BVA = Boîte de vitesse automatique BVM = Boîte de vitesse manuelle

BMW			
SERIE 1			
116i 1.6 BVA	E	Compacte	25 000 000
SERIE 3			
316d 1.6 BVA	D	Familiale	28 000 000
318d 1.8 BVA	D	Familiale	28 000 000
328i GT 2.8 BVA	E	Familiale	37 000 000
SERIE 4			
428i 2.8 BVA	E	Familiale	48 000 000
SERIE 5			
520d 2.0 BVA	D	Routière	45 000 000
535i 3.5 BVA	D	Routière	53 000 000
SERIE 6			
640i 4.0 BVA	E	Routière	68 000 000
SERIE 7			
730d 3.0 BVA	D	Berline de Luxe	85 000 000
750Li 5.0 BVA	E	Berline de Luxe	95 000 000
X1			
xDrive20i 2.0 BVA	E	SUV	32 000 000
X3			
xDrive20i 2.0 BVA	E	SUV (4x4)	35 000 000
xDrive20d 2.0 BVA	E	SUV (4x4)	35 000 000
X4			
xDrive30d 3.0 BVA	D	SUV (4x4)	49 500 000
xDrive20i 2.0 BVA	E	SUV (4x4)	45 000 000
xDrive20i 2.0 BVA	D	SUV (4x4)	45 000 000
X5			
xDrive30d 3.0 7p BVA	D	SUV (4x4)	58 000 000
xDrive35i 3.5 BVA	E	SUV (4x4)	59 000 000
X6			
xDrive30d 3.0 BVA	D	SUV (4x4)	68 000 000

CHERY			
QQ			
1.0 BVM	E	Urbaine	7 300 000

CHEVROLET			
COBALT			
1.5 BVM	E	Compact	10 900 000
CRUZE			
1.6 LS BVM	E	Familiale	14 900 000
1.6 LT BVA	E	Familiale	16 900 000
TRAX			
1.8 LS BVM	E	SUV (4x2)	16 200 000
N300			
1.2 PU BVM	E	Fourgon	7 900 000
Van 2 places BVM	E	Fourgon	8 900 000
Passenger 7 pl A/C BVM	E	Fourgon	9 900 000

CITROËN			
C3			
1.2 SX BVM	E	Citadine	9 700 000
C-ELYSÉE			
1.2 BVM	E	Compacte	11 800 000
1.6 BVM	E	Compacte	12 744 000
1.6 BVA	E	Compacte	13 806 000
C4			
1.6 BVM N1	E	Compacte	14 750 000
1.6 BVM N2	E	Compacte	15 812 000
C5			
1.6 Cuir BVA	E	Familiale	20 900 000
DS4			
1.6 Cuir Tissu	E	Citadine	17 240 000
1.6 Cuir	E	Citadine	19 540 000
1.6 So Chic BVA	E	Citadine	21 830 000
1.5 So Chic BVA Cuir	E	Citadine	24 426 000
DS5			
1.6 So Chic Cuir BVA	E	Compacte	29 736 000
1.6 Sport Chic BVA	E	Compacte	34 574 000
C4 AIRCROSS			
2.0 BVM	E	SUV (4x2)	14 900 000
2.0 BVA	E	SUV (4x2)	16 200 000
2.0 BVM	E	SUV (4x4)	16 540 000
2.0 BVA	E	SUV (4x4)	18 540 000
BERLINGO			
1.6 HDI	D	Utilitaire	13 600 000
JUMPER			
2.2 FT 35 BVM	D	Utilitaire	19 116 000
2.2 FT 35 BVM Clim.	D	Utilitaire	19 824 000
2.2 FV 35 Clim. 18PL	D	Utilitaire	33 512 000
500 L			
1.2l, 7cv, 85ch, BVM	E	Monospace	9 000 000
500 X			
2.4l, 14cv, 170ch, BVM	E	Comp. (4x2)	Sur demande
LINEA			
1.4l, 8ch, 102ch, BVM	E	Compacte	7 500 000
TIPO			
1.4l BVM	E	Routière	À VENIR
1.6l,BVA	E	Routière	À VENIR
1.3l,BVM	D	Routière	À VENIR

1.5 Ambiente BVM	E	SUV (4x2)	13 900 000
1.5 Trend BVA	E	SUV (4x2)	15 900 000
ESCAPE			
1.5 GTDI SE BVM	E	SUV (4x2)	16 500 000
2.0 GTDI SE BVA	E	SUV (4x2)	18 900 000
1.5 GTDI SE BVA	E	SUV (4x4)	19 900 000
2.0 GTDI TITANIUM BVA	E	SUV (4x4)	25 900 000
EDGE			
2.0 Eco B SE BVA	E	SUV (4x2)	25 950 000
2.0 Eco B SEL BVA	E	SUV (4x2)	28 950 000
2.0 Eco B SEL BVA	E	SUV (4x4)	30 950 000
2.0 Eco B Titanium BVA	E	SUV (4x4)	32 950 000
EXPLORER			
3.5 Eco B V6 BVA	E	SUV (4x4)	46 500 000
EVEREST			
2.2 XLT BVM	D	4x4	31 900 000
3.2 XLT BVA	D	4x4	38 900 000
3.2 Limited BVA	D	4x4	43 950 000
RANGER			
2.2 SC BVM	D	Pick Up (4x2)	14 900 000
2.2 SC BVM	D	Pick Up (4x4)	16 800 000
2.2 DC Base BVM	D	Pick Up (4x4)	18 500 000
2.2 DC BVM + airbags	D	Pick Up (4x4)	18 900 000
2.2 DC XL BVM	D	Pick Up (4x4)	20 500 000
DUBLO			
1.3l, 7cv,102ch, BVM	E	Fourgon	13 000 000
DUCATO			
8cv, 115ch, BVM	E	Fourgon	17 000 000
FULLBACK			
2.5 BVM	D	Pick-up	16 000 000

FORD

FIGO			
1.2 Ambiente BVM	E	Citadine	9 800 000
FIESTA			
1.4 Ambiente BVM	E	Citadine	9 950 000
1.6 Trend BVA	E	Citadine	11 900 000

KIA

RIO			
1.4 4p BVM Sedan	E	Citadine	14 600 000
1.4 5p BVM	E	Citadine	14 900 000
1.4 5p BVA	E	Citadine	15 200 000
CERATO			
1.6 4p BVM	E	Compacte	17 500 000
OPTIMA			
2.0 BVA	E	Compacte	25 000 015
SOUL			
1.6 Bi Ton BVM	E	Mono. Poly.	15 500 000
1.6 Bi Ton BVA	E	Mono. Poly.	17 000 000
SPORTAGE			
2.0 BVM	E	SUV (4x2)	18 200 000
2.0 BVM	E	SUV (4x4)	19 300 000
2.0 BVA	E	SUV (4x2)	21 500 000
2.0 BVA	E	SUV (4x4)	26 700 000
SORENTO			
2.2 BVM	D	SUV (4x4)	30 700 000
2.2 Super Luxe BVA	D	SUV (4x4)	37 800 000
2.4 Super Luxe BVA	E	SUV (4x4)	39 000 000
MOHAVE			
3.0 SL BVA	D	SUV (4x4)	32 900 000
K 3000S			
2.0 BVM	E	SUV (4x4)	NC
2.0 BVM	D	SUV (4x4)	NC
2.0 MPI BVA	D	SUV (4x4)	no disponible
SANTA FE			
2.0 MPI Prestige BVM	E	SUV (4x4)	no disponible
2.4 Cuir Prestige BVA	E	SUV (4x4)	no disponible

ISUZU

D-MAX			
250 2.5 BVM	D	Pick Up (4x4)	19 900 000

JEEP

GRAN CHEROKEE			
3.0 V6 Limited BVA	E	SUV (4x4)	39 000 000

1.2 BVM	E	Urbaine	NC
i20			
1.2 BVM	E	Urbaine	NC
ACCENT			
1.6 TCI BVM	D	Compacte	NC
ELANTRA			
1.6 BVM	E	Familiale	NC
SONATA			
2.0 MPI BVM	E	Familiale	NC
2.0 CUIR BVA	E	Familiale	NC
AZERA			
2.0 CUIR BVA	E	Routière	NC
GENESIS			
2.0 CUIR BVA	E	Routière	NC
EQUUS			
2.0 CUIR BVA	E	Routière	NC
CRETA			
À VENIR	E	SUV (4x2)	NC
IX35			
2.0 BVM	E	SUV (4x2)	NC
2.0 BVA	E	SUV (4x2)	NC
3.2 DC XLT BVM	D	Pick Up (4x4)	24 900 000
3.2 DC LTD BVA	D	Pick Up (4x4)	28 900 000
3.2 WLT BVA	D	Pick Up (4x4)	29 900 000
TRANSIT			
2.2 Van High Roof BVM	D	Utlilitaire	19 500 000
2.2 Minibus 15P BVM	D	Utlilitaire	28 000 000

GREAT WALL

VOLEEX C30			
1.5 BVM	E	Familiale	9 250 000
VOLEEX C50			
1.5 BVM	E	Familiale	12 500 000
M4			
1.5 BVM	E	SUV	9 800 000
H5			

CLASSE C			
2.0 200 Avangarde BVA	E	Routière	38 500 000
2.0 Exclusive BVA	E	Routière	39 800 000
CLASSE E			
3.0 300 Elégance BVA	E	Routière	56 000 000
GLA			
180 pack Excusif	E	4x4	35 900 000
180 pack AMG Line	E	4x4	39 900 000
GLC			
300	E	4x4	48 200 000
400 4M	E	4x4	68 800 000
400 4M Coupé	E	4x4	73 800 000
3.0 BVM Frigo	D	Utilitaire	24 500 000
3.0 BVM Plateau Ridelles	D	Utilitaire	15 500 000

LAND ROVER

RANGE ROVER EVOQUE			
2.2 Pure Tech SD4 BVA	D	SUV (4x4)	Sur Demande
2.0 Pure Tech SI4 BVA	E	SUV (4x4)	Sur Demande
2.0 Dynamic SI4 BVA	E	SUV (4x4)	Sur Demande
DISCOVERY SPORT			
2.2 SE TD4 BVA	D	SUV (4x4)	Sur Demande
2.2 HSE SD4 BVA	D	SUV (4x4)	Sur Demande
2.0 HSE SI4 BVA	E	SUV (4x4)	Sur Demande
RANGE ROVER SPORT			
3.0 SDV6 BVA	D	SUV (4x4)	Sur Demande
3.0 Dynamic V6 BVA	E	SUV (4x4)	Sur Demande

MINI			
COOPER			
1.6 BVA	E	Compacte	Sur demande
COUPÉ			
1.6 2 places BVA	E	Coupé	24 000 000
ROADSTER			
1.6 2 places BVA	E	Coupé Cab.	25 000 000
COUNTRYMAN			
1.8 4x4 BVA	E	Compacte	26 000 000
PACEMAN			
1.6 BVA	E	Compacte	29 000 000

MITSUBISHI			
ASX			
2.0 BVM	E	SUV (4x2)	16 541 000
2.0 BVA	E	SUV (4x2)	18 921 000
2.0 BVM	E	SUV (4x4)	17 731 000
2.0 BVA	E	SUV (4X4)	20 944 000
PAJERO			
2.8 GLS TD 7pl BVM	D	4x4	29 750 000
2.8 GLS TD 7pl BVA	D	4x4	32 011 000
3.2 DI-D SL 7pl BVA	D	4x4	38 675 000
PAJERO SPORT			
2.5 BVM	D	4x4	26 240 000
2.4 MIVEC DID BVA	D	4x4	34 500 000
L200			
2.5 DID SC	D	Pick Up (4x4)	18 802 000
2.5 DID DC GL	D	Pick Up (4x4)	19 635 000
2.5 DID SC GLS BVM	D	Pick Up (4x4)	24 871 000
2.5 DID SC GLS BVA	D	Pick Up (4x4)	27 965 000

NISSAN			
MICRA			
1.2 BVM	E	Citadine	10 993 668
1.2 BVA	E	Citadine	12 151 578
ALMERA			
1.5 BVM	E	Compact	14 761 884
1.5 BVA	E	Compact	16 845 648
SENTRA			
1.6 BVM	E	Familiale	17 725 566
1.8 BVA	E	Familiale	21 245 238
TEANA			
2.5 BVA	E	Routière	29 514 342
3.5 BVA	E	Routière	31 927 644
JUKE			
1.6 Tekna BVM	E	SUV (4x2)	20 247 943
1.6 Tekna BVA	E	SUV (4x2)	18 540 329
QAISHQAI			
2.0 Accenta BVA	E	SUV (4x4)	19 498 446
1.6 Accenta BVM	D	SUV (4x4)	19 678 736
4008			
2.0 Active BVM	E	SUV (4x2)	17 990 000
2.0 Active BVA	E	SUV (4x2)	18 990 000
2.0 Active BVA	E	SUV (4x4)	20 200 000
PARTNER			
1.9 Origin 2 pl BVM	D	Van/Fourgon	11 500 000
BOXER			
2.2 HDI BVM L2H1	D	Van/Fourgon	19 500 000
2.2 HDI BVM L3H2	D	Van/Fourgon	19 990 000

RENAULT			
LOGAN			
1.2 Authentique BVM	E	Compacte	9 900 000
1.2 Dynamique BVM	E	Compacte	11 500 000
1.5 Authentique BVM	D	Compacte	10 900 000
1.5 Dynamique BVM	D	Compacte	12 900 000
SANDERO			
1.2 Authentique BVM	E	Compacte	9 900 000
1.5 Authentique BVM	D	Compacte	10 900 000
1.6 StepWay Exp. BVM	E	Compacte	10 500 000
1.6 StepWay Dyn. BVM	E	Compacte	11 500 000
MCV BREAK			
1.5 DCI Auth. BVM	D	Routière	11 600 000
1.5 DCI Dyn. BVM	D	Routière	13 500 000
FLUENCE			
1.6 Expression BVM	E	Familiale	13 500 000
1.6 Expression BVM	E	Familiale	14 500 000
1.6 Dynamique BVM	E	Familiale	14 400 000
LODGY			
1.6 Expression 5p BVM	E	Familiale	11 300 000
1.6 Expression 7p BVM	E	Familiale	12 300 000
1.6 Dynamique 7p BVM	E	Familiale	12 700 000
LATITUDE			
2.0 Luxe BVA	E	Familiale	21 900 000
DUSTER			
1.6 Authentique BVM	E	SUV (4x2)	10 900 000
1.6 Dynamique BVM	E	SUV (4x2)	14 200 000
1.6 Prestige BVM	E	SUV (4x2)	14 500 000
2.0 Dynamique BVA	E	SUV (4x2)	15 200 000
1.6 Authentique BVM	E	SUV (4x4)	13 900 000
1.6 Prestige BVM	E	SUV (4x4)	14 200 000
2.0 Prestige BVA	E	SUV (4x4)	16 200 000
1.5 Dci Auth. BVM	D	SUV (4x2)	12 900 000
1.5 Dci. Auth. BVM	D	SUV (4x4)	15 500 000
1.5 Dci Dyna. BVM	D	SUV (4x4)	16 500 000
1.5 Dci Prestige BVM	D	SUV (4x4)	17 500 000
CAPTUR			
1.2 Dynamique BVA	E	SUV (4x2)	16 900 000
KADJAR			

NAVARA			
2.5 SE DC DL 701 BVM	E	Pick Up (4x2)	22 968 000
2.5 LE DC DL 707 BVM	D	Pick Up (4x2)	24 624 000
2.5 LE DC DL 710 BVM	D	Pick Up (4x4)	24 449 000
PATROL PICK UP			
3.0 SGL SC BVM	D	Pick Up (4x4)	26 749 000
4.8 SGL SC BVM	E	Pick Up (4x4)	27 217 000
URBAN			
2.5 STD DX EL 804 BVM	D	Van long	19 393 000
2.5 High DX EL 806 BVM	E	Van super long	18 094 000
2.5 High DX EL 807 BVM	E	Van super long	19 912 000
PEUGEOT			
301			
1.2 Active BVM	E	Compacte	10 990 000
1.6 BVM Allure	E	Compacte	11 750 000
1.6 BVA Allure	E	Compacte	13 400 000
508			
1.6 THP Active BVA	E	Routière	21 990 000
1.6 THP Allure BVA	E	Routière	23 990 000
2008			
1.3 Active BVM	E	SUV	14 500 000

JIMNY			
1.3 JX BVM	E	4x4	10 500 000
1.3 JLX BVM	E	4x4	11 500 000
VITARA			
1.6 BVM	E	SUV (4x2)	13 000 000
1.6 BVA	E	SUV (4x2)	15 900 000
1.6 BVM	E	SUV (4x4)	15 900 000
GRAND VITARA			
2.0 JLX BVM	E	SUV	14 900 000
2.0 JLX BVM	E	SUV (4x4)	16 500 000
2.4 JLX BVM	E	SUV (4x4)	17 500 000
2.0 JLX BVA	E	SUV (4x4)	18 500 000
2.4 JLX BVM CUIR	E	SUV (4x4)	18 500 000
2.4 JLX BVA CUIR	E	SUV (4x4)	19 500 000
SX CROSS			
2.7 7p Luxe BVA	D	SUV (4x4)	27 500 000
ACTYON			
2.0 BVM	D	Pick Up (4x4)	16 500 000
KORANDO			
2.0 Trend BVM	E	SUV (4x2)	17 200 000
2.0 Luxe Cuir BVM	D	SUV (4x4)	18 200 000
2.0 Luxe Cuir BVA	D	SUV (4x4)	20 500 000
SUZUKI			
ALTO			
0.8 GLX BVM	E	Urbaine	6 590 000
CELERIO			
1.0 GLX BVM	E	Urbaine	6 990 000
CIAZ			
1.4 GL BVM	E	Familiale	9 900 000
1.4 GL BVM	E	Familiale	10 900 000
1.4 GL BVA	E	Familiale	12 500 000
SWIFT DZIRE			
1.2 GL BVM	E	Citadine	9 500 000
1.2 Hatchback GL	E	Citadine	9 200 000
ERTIGA			
1.4 GLX BVM	E	Monospace	10 900 000

2.0 TDI T/line BVM	D	Pick Up (4x4)	23 750 000
2.0 TDI H/line DC BVM	D	Pick Up (4x4)	28 350 000
CADDY			
1.6 2 pl BVM	E	Van/Fourgon	12 800 000
1.6 5 p Combi BVM	E	Van/Fourgon	13 750 000
T6			
2.5 TDI BVM 9 places	E	Van/Fourgon	22 750 000
CRAFTER			
2.5 TDI 3pl BVM	D	Van/Fourgon	36 000 000
2.5 TDI 19pl BVM	D	Van/Fourgon	39 000 000

X-TRAIL			
2.5 BVA	E	SUV (4x4)	24 711 603
1.6 BVM	D	SUV (4x2)	25 049 769
1.6 BVM	D	SUV (4x4)	25 240 202
PATHFINDER			
3.5 Base BVA	E	SUV (4x4)	38 791 000
3.5 SV BVA	E	SUV (4x4)	41 413 000
PATROL Y 62			
5.6 SE BVA	E	4x4	51 000 000
5.6 LE BVA	E	4x4	56 995 000
PATROL X 61			
3.0 14YL BVM	D	4x4	34 595 000
3.0 STD 10pl 14YL BVM	D	4x4	34 214 000
3.0 SGL 14YL BVA	D	4x4	45 148 000
4.8 SGL 14YL BVM	E	4x4	47 490 000
MURANO			
3.5 BVA	E	SUV (4x4)	33 253 000
HARDBODY			
2.5 STD SC AL001 BVM	D	Pick Up (4x2)	17 367 000
2.5 STD DC AL005 BVM	D	Pick Up (4x2)	19 710 000
2.5 STD SC AL004 BVM	D	Pick Up (4x4)	20 993 000
2.5 STD DC AL006 BVM	D	Pick Up (4x4)	20 967 000
2.4 STD SC AL003 BVM	E	Pick Up (4x2)	18 455 000
2.4 AX DC AL012 BVM	E	Pick Up (4x4)	22 966 000

NAVARA			
2.5 SE DC DL 701 BVM	E	Pick Up (4x2)	22 968 000
2.5 LE DC DL 707 BVM	D	Pick Up (4x2)	24 624 000
2.5 LE DC DL 710 BVM	D	Pick Up (4x4)	24 449 000
PATROL PICK UP			
3.0 SGL SC BVM	D	Pick Up (4x4)	26 749 000
4.8 SGL SC BVM	E	Pick Up (4x4)	27 217 000
URBAN			
2.5 STD DX EL 804 BVM	D	Van long	19 393 000
2.5 High DX EL 806 BVM	E	Van super long	18 094 000
2.5 High DX EL 807 BVM	E	Van super long	19 912 000
PEUGEOT			
301			
1.2 Active BVM	E	Compacte	10 990 000
1.6 BVM Allure	E	Compacte	11 750 000
1.6 BVA Allure	E	Compacte	13 400 000
508			
1.6 THP Active BVA	E	Routière	21 990 000
1.6 THP Allure BVA	E	Routière	23 990 000
2008			
1.3 Active BVM	E	SUV	14 500 000

1.2 BVA Expression	E	SUV (4x2)	18 900 000
1.2 BVA Dynamique	E	SUV (4x2)	20 900 000
DOCKER			
1.5 Tolé Auth. BVM	D	Van/Fourgon	11 200 000
MASTER			
2.3 Tolé Auth. BVM	D	Van/Fourgon	20 900 000
SAMAND SENIRAN			
MANDORI			
1.8i BVM	EG	Citadine	6 000 000
SOREN			
1.8i BVM	EG	Citadine	8 500 000
ARISUN			
1.6 BVM	EG	Utilitaire	5 900 000
RUNNA			
1.6 BVM	EG	Citadine	6 962 000
DENA			
1.6 BVM	EG	Citadine	8 000 024
PARS			
1.8i BVM	EG	Compacte	7 500 000
SABA			
1.2 BVM	EG	Urbaine	4 300 000
SSANGYONG			
REXTON			
2.7 7p BVM	D	SUV (4x4)	24 100 000
2.7 7p Luxe BVA	D	SUV (4x4)	27 500 000
ACTYON			
2.0 BVM	D	Pick Up (4x4)	16 500 000
KORANDO			
2.0 Trend BVM	E	SUV (4x2)	17 200 000
2.0 Luxe Cuir BVM	D	SUV (4x4)	18 200 000
2.0 Luxe Cuir BVA	D	SUV (4x4)	20 500 000
SUZUKI			
ALTO			
0.8 GLX BVM	E	Urbaine	6 590 000
CELERIO			
1.0 GLX BVM	E	Urbaine	6 990 000
CIAZ			
1.4 GL BVM	E	Familiale	9 900 000
1.4 GL BVM	E	Familiale	10 900 000
1.4 GL BVA	E	Familiale	12 500 000
SWIFT DZIRE			
1.2 GL BVM	E	Citadine	9 500 000
1.2 Hatchback GL	E	Citadine	9 200 000
ERTIGA			
1.4 GLX BVM	E	Monospace	10 900 000

JIMNY			
1.3 JX BVM	E	4x4	10 500 000
1.3 JLX BVM	E	4x4	11 500 000
VITARA			
1.6 BVM	E	SUV (4x2)	13 000 000
1.6 BVA	E	SUV (4x2)	15 900 000
1.6 BVM	E	SUV (4x4)	15 900 000
GRAND VITARA			
2.0 JLX BVM	E	SUV	14 900 000
2.0 JLX BVM	E	SUV (4x4)	16 500 000
2.4 JLX BVM	E	SUV (4x4)	17 500 000
2.0 JLX BVA	E	SUV (4x4)	18 500 000
2.4 JLX BVM CUIR	E	SUV (4x4)	18 500 000
2.4 JLX BVA CUIR	E	SUV (4x4)	19 500 000
SX CROSS			
1.6 GL BVM	E	SUV	13 200 000
1.6 GLX BVM	E	SUV (4x2)	14 200 000
1.6 GLX BVM	E	SUV (4x4)	16 200 000
APV			
1.6 GLX 8p BVM	E	Van/Fourgon	13 500 000
1.5 Panel Van 2p BVM	E	Van/Fourgon	10 750 000
CARRY			
1.5 2 pl BVM	E	Pick Up	9 500 000
TOYOTA			
YARIS			
1.3 Sedan Lounge BVM	E	Citadine	14 000 000
1.3 Hatchback BVM	E	Citadine	13 500 000
1.3 Hatchback BVA	E	Citadine	15 700 000
1.3 Hatchback 5 portes	E	Citadine	14 500 000
COROLLA			
1.6 Sedan BVM	E	Compacte	19 900 000
1.8 CVT Sedan	E	Compacte	21 000 000
AVENZA			
1.3 VVTI BVM	E	Monospace	15 100 000
1.3 VVTI DLX BVM	E	Monospace	16 000 000
AVENSIS			
2.0 BVA	E	Familiale	24 200 000
CAMRY			
2.0 TDI T/line BVM	D	Pick Up (4x4)	23 750 000
2.0 TDI H/line DC BVM	D	Pick Up (4x4)	28 350 000
CADDY			
1.6 2 pl BVM	E	Van/Fourgon	12 800 000
1.6 5 p Combi BVM	E	Van/Fourgon	13 750 000
T6			
2.5 TDI BVM 9 places	E	Van/Fourgon	22 750 000
CRAFTER			
2.5 TDI 3pl BVM	D	Van/Fourgon	36 000 000
2.5 TDI 19pl BVM	D	Van/Fourgon	39 000 000

2.4 Sedan BVA	E	Routière	35 200 000
3.5 Sedan BVA	E	Routière	46 000 000
RAV4			
2.0 BVM	E	SUV	18 400 000
2.0 CVT BVA	E	SUV	20 100 000
2.0 CVT BVM	E	SUV	20 600 000
2.0 CVT BVA	E	SUV (4x4)	22 20 000
2.5 CVT Cuir BVA	E	SUV (4x4)	25 800 000
FORTUNER			
3.0 BVM	D	4x4	31 300 000
2.7 BVM	D	4x4	34 600 000
PRADO			
3.0 TX BVM	D	4x4	36 600 000
3.0 TD TX L D4D BVM	D	4x4	39 700 000
3.0 TD VX Alcantara BVA	D	4x4	51 500 000
3.0 TD VX Cuir BVA	D	4x4	53 800 000
LAND CRUISER			
HZJ 79 4.2 SC BVM	D	Pick Up (4x4)	31 500 000
HZJ 79 4.2 DC BVM	D	Pick Up (4x4)	34 500 000
HZJ 76 02 4.2 BVM	D	4x4	37 250 000
HZJ 76 03 4.2 BVM	D	4x4	35 150 000
HZJ 78 4.2 13p BVM	D	4X4	28 850 000
200 4.5p 10p BVM	D	4x4	64 900 000
200 4.5 GX D4D BVM	D	4x4	72 750 000
200 VX 7p BVA	D	4x4	78 750 000
HILUX			
3.0 SC BVM	D	Pick Up 4x4)	18 900 000
3.0 DC STD BVM	D	Pick Up 4x4)	19 500 000
3.0 SC MEDIUM BVM	D	Pick Up (4x4)	21 900 000
3.0 SC HIGH G. BVM	D	Pick Up (4x4)	23 500 000
HIACE			
3.0 15 pl BVM	D	Van	19 500 000
VOLKSWAGEN			
POLO			
1.4 Trend BVM	E	Citadine	11 500 000
1.4 Sedan High BVA	E	Citadine	12 750 000
JETTA			
2.0 T/line BVM	E	Familiale	17 750 000
PASSAT			
1.8 TSI C/line BVA	E	Routière	24 700 000
1.8 TSI H/line BVA	E	Routière	26 750 000
CC 1.8 TSI H/line BVA	E	Routière	30 950 000
TIGUAN			
2.0 Trend & fun BVM	E	SUV (4x2)	21 950 000
2.0 Luxe BVA	E	SUV (4x2)	29 550 000
TOUAREG			

3.0 V6 TDI EXE BVA	D	4x4	39 500 000
3.6 V6 FSI EXE BVA	E	4x4	40 500 000
3.0 V6 TDI Luxe BVA	D	4x4	44 150 000
3.0 V6 FSI Luxe BVA	E	4x4	47 000 000
3.0 V6 TDI S Luxe BVA	D	4x4	54 650 000
3.0 V6 FSI S luxe BVA	E	4x4	55 350 000
3.0 V6 FSI RLINE BVA	E	4x4	56 500 000
AMAROK			

Source : Déclic Car, August 2016

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