SALES AND HIGHLIGHTS

2016

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Appendices

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Detailed information regarding these uncertainties and potential risks are available in the reference document (Document de référence) of EDF filed with the Autorité des marchés financiers on 29 April 2016 and in the EDF EMTN base prospectus dated 14 September 2016 as supplemented on 3 October 2016, which are available on the AMF's website at www.amf-france.org and on EDF's website at www.edf.com.

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Consolidated sales

9M 2016 sales by reporting segment

In millions of euros	TOTAL GROUP	France	United Kingdom	Italy	Other International	Other activities
9M 2014 sales restated for IFRIC 21	**52,331**	**29,123**	**7,318**	**9,192**	**3,958**	**2,740**
Forex	921	-	816	(1)	19	87
Scope	1,642	(176)	-	7	48	1,763
Organic growth	(1,119)	(249)	(381)	(607)	60	58
9M 2015 sales published	**53,775**	**28,698**	**7,753**	**8,591**	**4,085**	**4,648**
Accounting reclassification(1)	759	-	759	-	-	-
9M 2015 sales restated	**54,534**	**28,698**	**8,512**	**8,591**	**4,085**	**4,648**
Forex	(878)	-	(791)	(2)	(73)	(12)
Scope	14	-	-	(34)	(51)	99
Organic growth	(1,704)	125	(884)	(501)	(266)	(178)
9M 2016 sales	**51,966**	**28,823**	**6,837**	**8,054**	**3,695**	**4,557**

(1) €759m of EDF Energy net power sales on the wholesale electricity markets (excluding trading activities) have been reclassified from energy purchases to sales

Organic growth in Group sales by segment

In millions of euros	9M 2015	9M 2016	Δ% Org.(1)
France	28,698	28,823	+0.4%
France excluding 2014 tariff adjustment(3)	*28,698*	*27,805*	*-3.1%*
United Kingdom	8,512(2)	6,837	-10.4%
Italy	8,591	8,054	-5.8%
Other International	4,085	3,695	-6.5%
Other activities	4,648	4,557	-3.8%
Other activities excluding 2014 tariff adjustment(3)	*4,648*	*4,545*	*-4.1%*
Total Group	**54,534(2)**	**51,966**	**-3.1%**
Total Group excluding 2014 tariff adjustment(3)	***54,534***	***50,936***	***-5.0%***

(1) Organic change at constant scope and exchange rates
(2) €759m of EDF Energy net power sales on the wholesale electricity markets (excluding trading activities) have been reclassified from energy purchases to sales
(3) 2014 tariff adjustment relating to the impact of the regularisation of regulated tariffs in France for the period from 1 August 2014 to 31 July 2015 following the French State Council's decision of 15 June 2016

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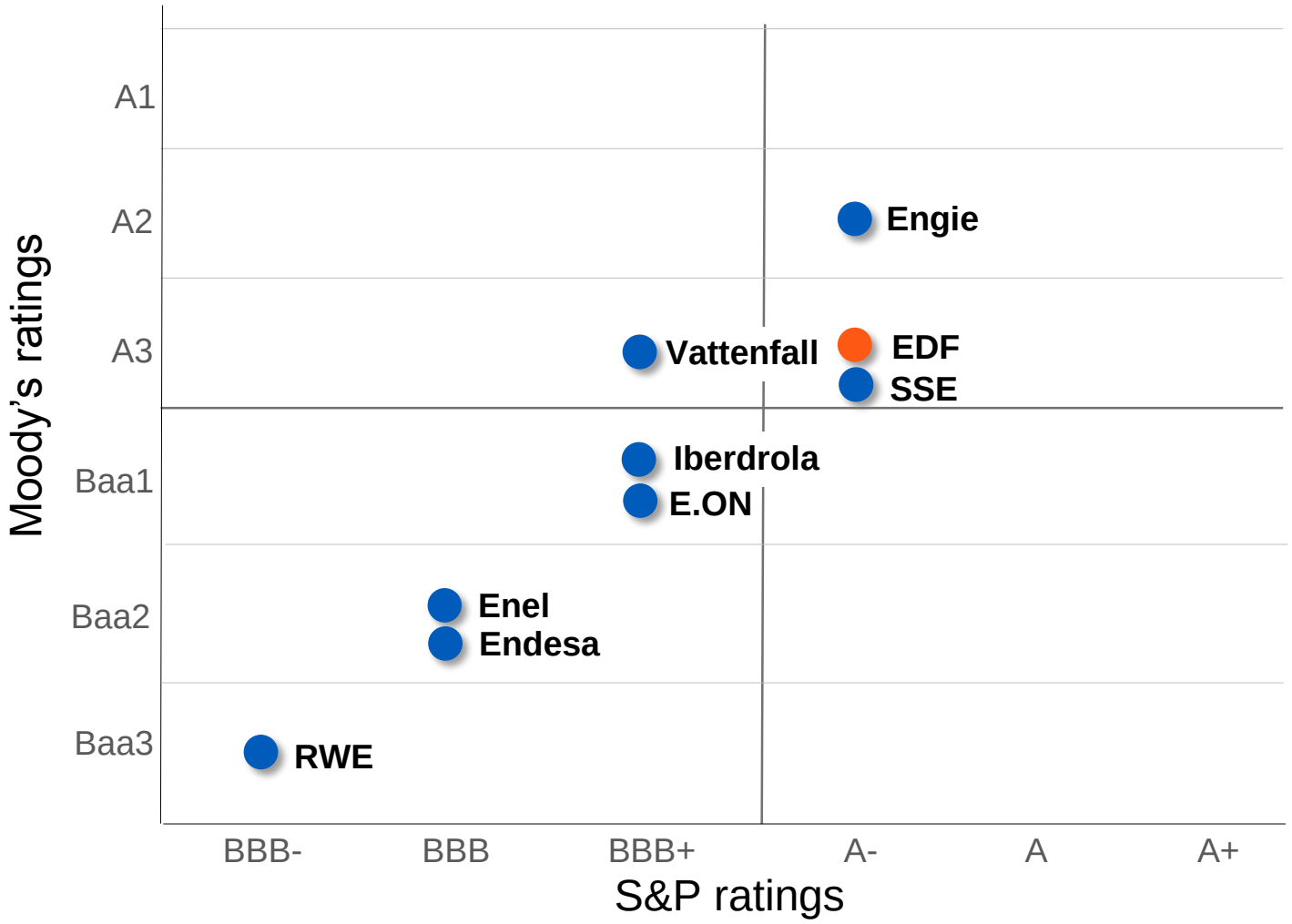
Debt ratings

Comparative debt ratings



	S&P Ratings	Moody's Ratings	Fitch Ratings
EDF	A- stable(1)	A3 stable(2)	A- stable(3)
Engie	A - negative	A2 stable	n/a
E.ON	BBB+ negative	Baa1 negative	BBB+ stable
Uniper	BBB- stable	n/a	n/a
Enel	BBB stable	Baa2 stable	BBB+ stable
RWE	BBB- negative	Baa3 stable	BBB watch negative
Iberdrola	BBB+ stable	Baa1 positive	BBB+ stable
SSE	A- negative	A3 stable	BBB+ stable
Endesa	BBB stable	n/a	BBB+ stable
Vattenfall	BBB+ negative	A3 negative	BBB+ stable

n/a: not available

Sources: rating agencies
(1) EDF Group rating and outlook updated by S&P as of 21 September 2016
(2) EDF Group rating and outlook updated by Moody's as of 28 September 2016
(3) EDF Group rating and outlook updated by Fitch as of 7 June 2016

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Strategy & investments

Net electricity output

In TWh	**9M 2015**		**9M 2016**	
Nuclear	354.7	*77%*	339.2	*78%*
Coal/Fuel oil	30.0	*6%*	15.5	*4%*
CCGT	30.1	*7%*	32.4	*7%*
Hydro	35.1	*8%*	37.1	*9%*
Other Renewables	10.1	*2%*	10.8	*2%*
Group	**460.0**	***100%***	**434.8**	***100%***

CO_2 emissions

Net emissions by segment	In kt				In g/kWh	
	9M 2015		9M 2016		9M 2015	9M 2016
France	6,028	*14%*	6,379	*20%*	17	19
United Kingdom	13,742	*31%*	3,041	*10%*	220	56
Italy	5,366	*12%*	5,656	*17%*	338	356
Other International	15,059	*34%*	12,803	*40%*	551	535
Other activities	4,164	*9%*	4,081	*13%*	327	315
Groupe	**44,359**	***100%***	**31,959**	***100%***	**95**	**73**

EDF group's CO_2 emissions below the 100g/kWh threshold

Hinkley Point C: final contracts signed

Final contracts signed for Hinkley Point C

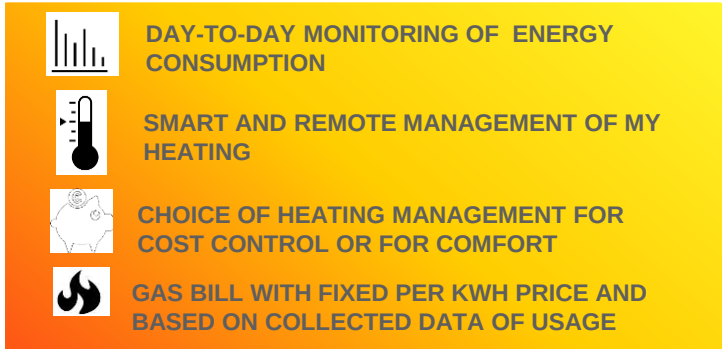
- EDF signed contracts with UK Government and Chinese partner CGN in London on 29 September 2016, sealing the final investment decision taken by the EDF Board on 28 July 2016. EDF's share is 66.5% and CGN's 33.5%
- It kicks the new nuclear build programme in the UK
- The signing marks the end of the project's development phase following several years of rigorous preparation and planning, from achieving the Generic Design Assessment for the EPR and the Nuclear Site Licence to the start of enabling works
- It also marks a new chapter in the longstanding partnership between EDF and CGN, and it will enable the development of nuclear power stations at Sizewell B and Bradwell B
- For Sizewell, EDF continues to engage with its stakeholders through further public consultation. For Bradwell, it is building the partnership with GNI working towards the GDA for UK Hualong
- First operation of Hinkley Point C is scheduled for end of 2025

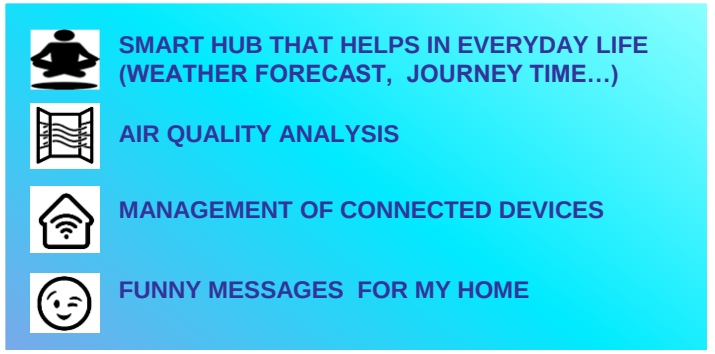
Recent developments

- The HPC project is now working towards to a schedule for build with an increase in resources to deliver the plan
- The project organisation has been established with command centres for Engineering, Delivery and Site to co-ordinate the works of different teams and contractors during the project. They will monitor the flow of delivery, drive construction integration and management
- The project benefits the local community delivering high quality jobs and apprenticeships for people in Somerset. A total of almost £4bn will go into the South West regional economy over the lifetime of the project. EDF Energy has already awarded South West contracts worth £500m, creating 650 jobs
- Preparations continue to meet the requirements of First Nuclear Safety Concrete pour which represents the start of construction from a regulatory perspective

Launch of Sowee: the Smart hub and energy offer that is revolutionising comfort in the home

- An EDF subsidiary, designed to operate like a start-up, which has created a comprehensive offer, Smart Hub, combining natural gas and other services, to ensure comfort in the home whilst also keeping energy bills down
- A device and app designed to manage energy consumption, optimise comfort and remotely control everyday smart devices
- Combined with Sowee natural gas, the Smart Hub allows customers to fine-tune their heating at home to the nearest euro or degree celsius
- Meeting customer needs by focusing on energy use and comfort in the home:





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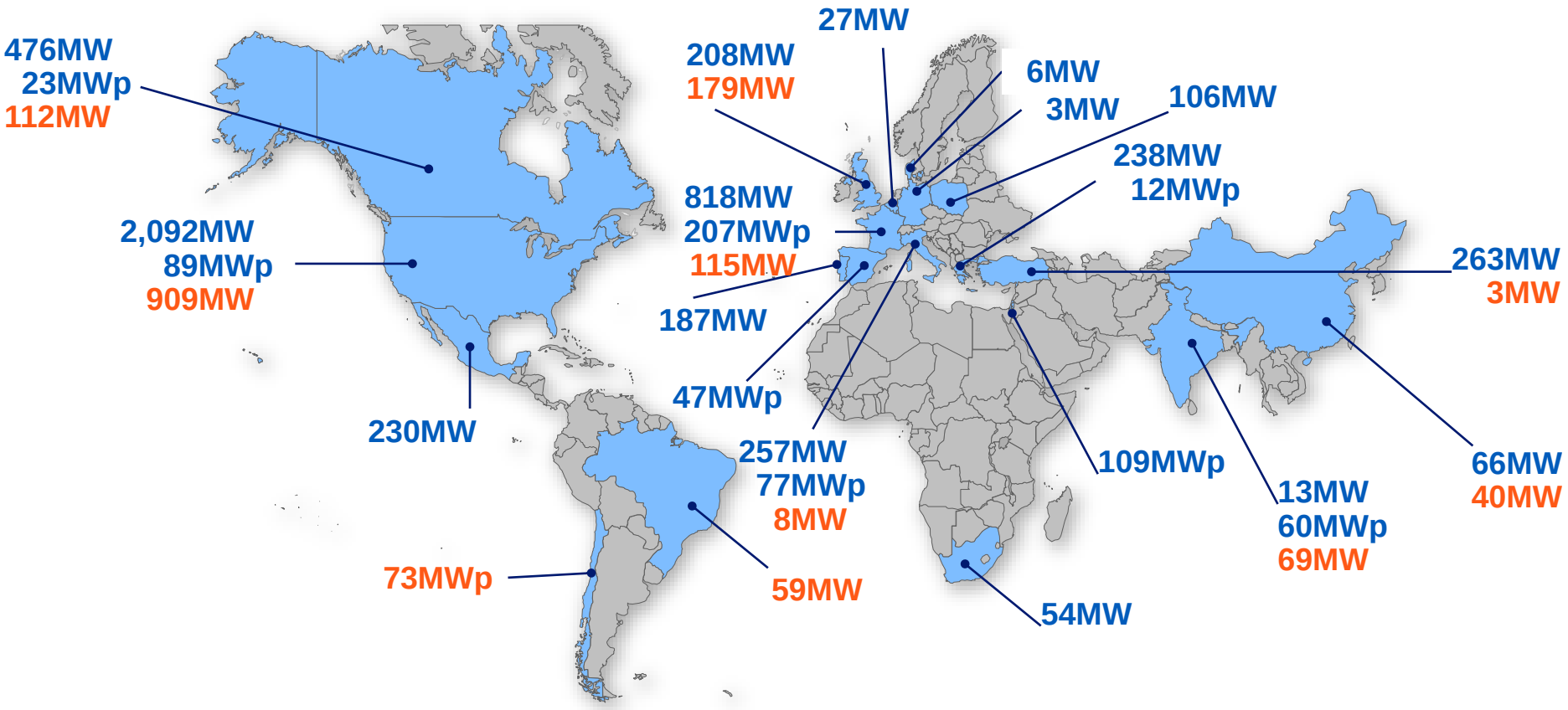
EDF Énergies Nouvelles

EDF EN: net installed capacity as of 30 September 2016



Wind installed (MW)
Solar installed (MWp)
Wind and solar under construction (MW)

	Gross	Net
Installed capacity:	9,080MW	5,864MW
Capacity under construction:	2,005MW	1,567MW
Total:	**11,085MW**	**7,431MW**

Other technologies
Installed 196MW
Under construction 12MW

Source: EDF Énergies Nouvelles
Note: MWp: Megawatt peak (measure of the power under standardised lighting and temperature conditions)

EDF EN: installed capacity and capacity under construction, by technology, as of 30 September 2016

In MW	Gross(1)		Net(2)	
	31/12/2015	**30/09/2016**	**31/12/2015**	**30/09/2016**
Wind	7,912	7,970	5,349	5,044
Solar	918	903	573	624
Hydro	77	63	74	60
Biogas	51	58	51	58
Biomass	66	66	58	58
Cogeneration	19	-	7	-
Other	20	20	20	20
Total installed capacity	**9,063**	**9,080**	**6,132**	**5,864**
Wind under construction	1,060	1,835	970	1,481
Solar under construction	330	159	151	73
Other under construction	19	12	19	12
Total capacity under construction	**1,409**	**2,005**	**1,141**	**1,567**

(1) Gross capacity: total capacity of the facilities in which EDF Énergies Nouvelles has a stake
(2) Net capacity: capacity corresponding to EDF Énergies Nouvelles' stake

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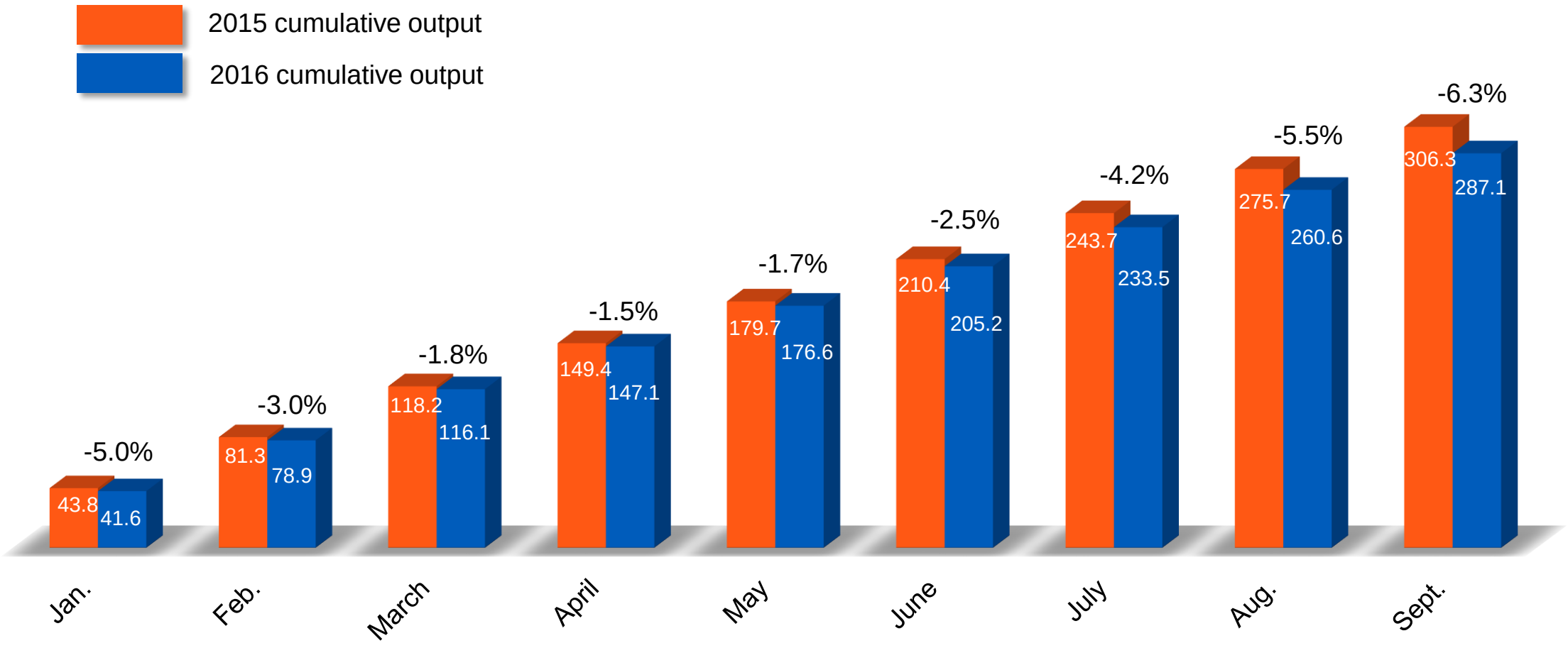
France

France monthly nuclear output

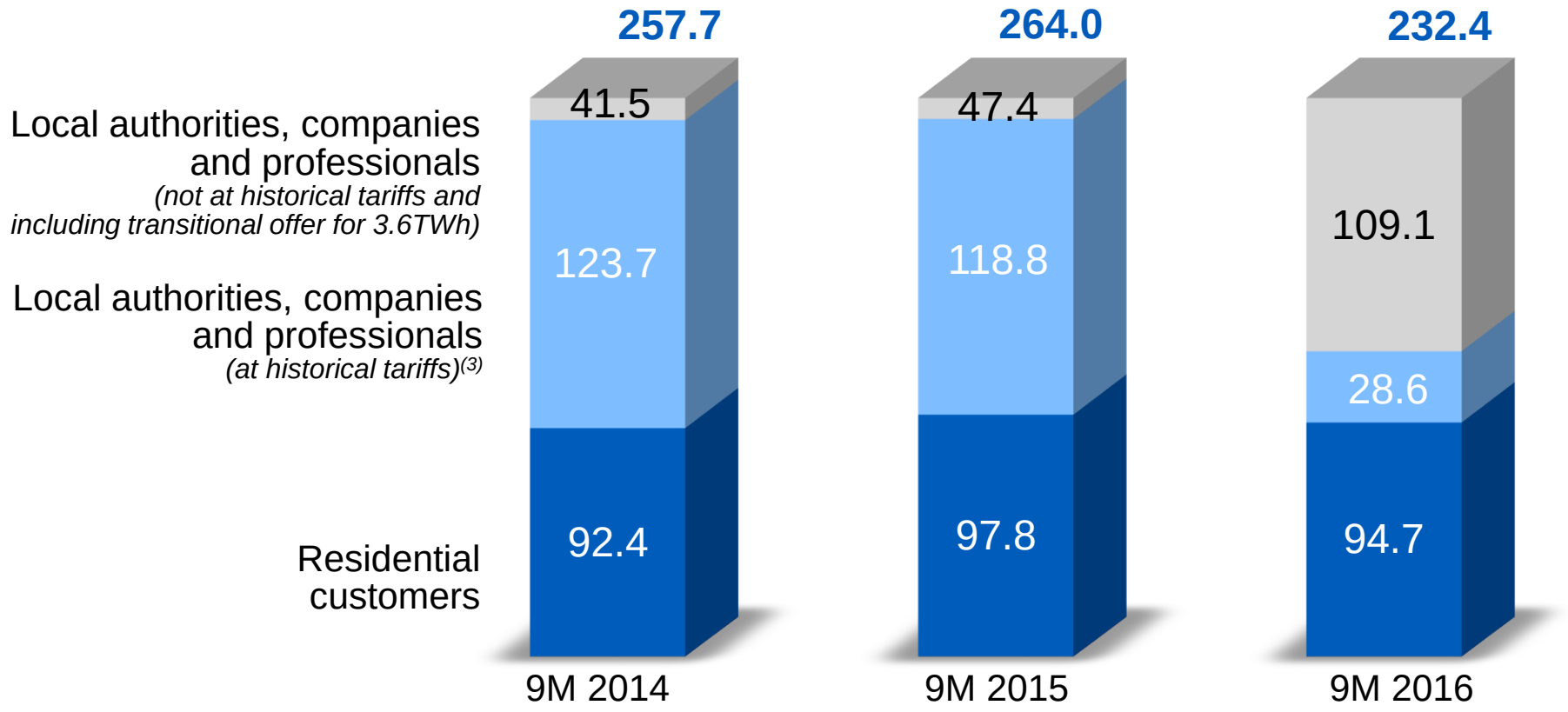
In TWh



EDF in France: electricity business

Sales to end customers(1)(2)

In TWh



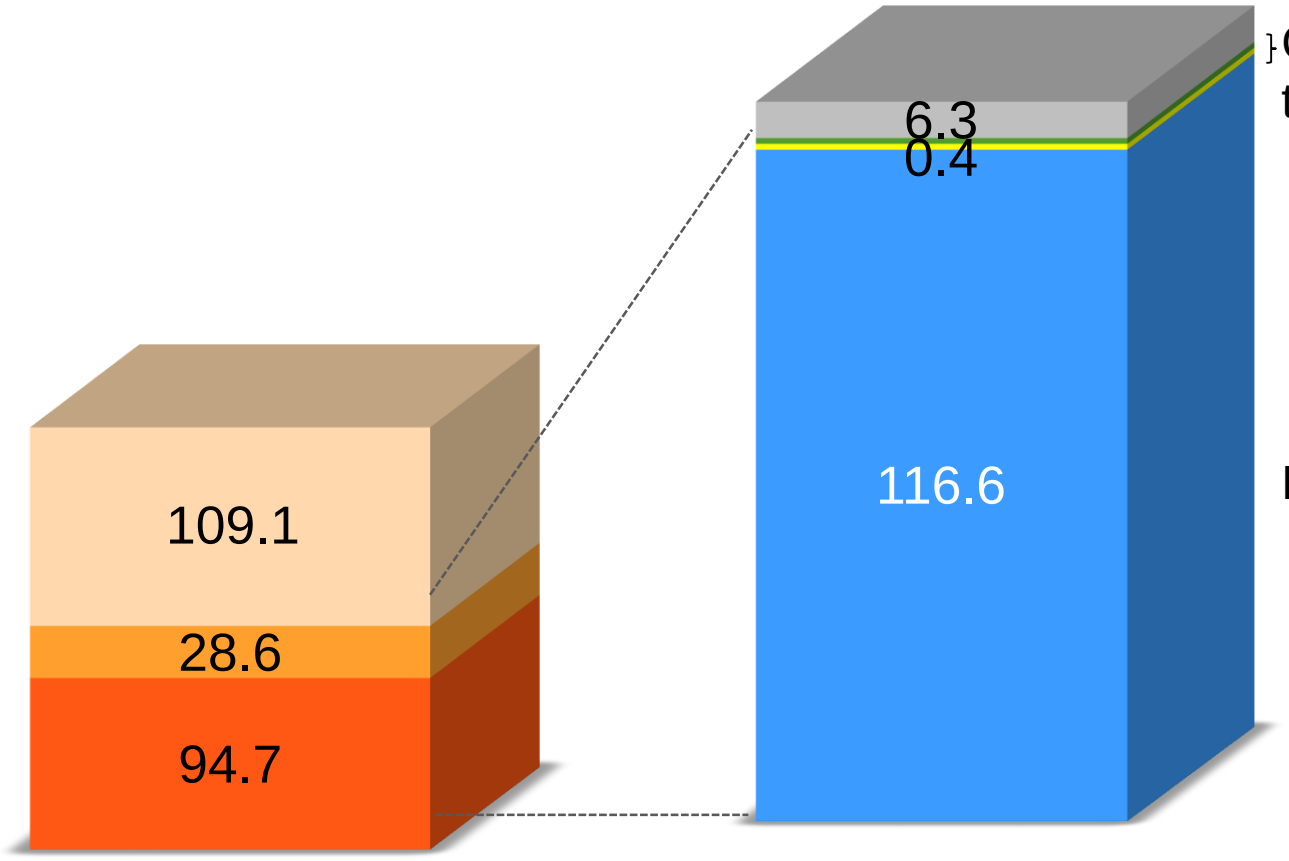
Portfolio change in particular due to the end of regulated tariffs above 36kVA at end 2015

(1) Rounded to the nearest tenth
(2) Including EDF's own consumption
(3) Blue professional tariff, LDC (Local Distribution Companies) at selling price and Yellow and Green tariffs, below 36kVA from 2016

EDF in France: electricity business – historical tariffs split by colour

In TWh

Sales to end customers for 9M 2016(1)(2)



(1) Rounded to the nearest tenth
(2) Including EDF's own consumption
(3) Local Distribution Companies (LDCs)
(4) Of which Yellow tariff for 0.2TWh and Green tariff for 0.2TWh - tariffs lower than 36 kVA that persist beyond 2015

CSPE(1) receivable: contemplated partial disposal
Context

Secure repayment plan of the CSPE(1) receivable held by EDF against the French State in place on 1 January 2016 (Ministerial order of 13 May 2016)

- Based on offset payments from the "Energy Transition" special allocation budget item and the "Public Energy Service" budget item in the French national budget
- Receivable corresponding to the compensation deficit of public service costs until 31/12/2015
- Represents €5,872m in EDF's accounts at 31/12/2015
- Amending decree expected after the CRE's validation in July 2016 of the 2016 compensation deficit

Repayment schedule confirmed by the Order of 13 May 2016(2) (before expected adjustment by a new order)

In €m	**Remaining compensation deficit on 31 December of the year N** (excluding 2015 interest)	**Principal repayment by the "Energy Transition" special allocation budget item**	**Payment of related future interest by the French national budget**
2015	5,772	-	-
2016	5,579	194	99.3
2017	4,351	1,228	99.3
2018	2,730	1,622	87.1
2019	891	1,839	62.4
2020	-	891	40.4(3)
Total	**-**	**5,772**	**388.5**

(1) CSPE: *Contribution au Service Public de l'Électricité* - Compensation of public service costs
(2) €5,872m corresponds to the compensation deficit of €5,772m plus €99.3 million in interest for 2015
(3) Of which €32.2m for 2019 and €8.2m for 2020

CSPE(1) receivable: contemplated partial disposal
Mechanism and financial impacts for EDF

Disposal project under study

- Short-term partial disposal project without recourse of the CSPE receivable for approximately €1,500m (~25% of the total receivable)
- Disposal of the receivable under the Dailly mechanism (without recourse)
- The disposed amount would include the share of the receivable not allocated to Dedicated Assets (i.e. €643m at 31/12/2015) and a portion of the receivable placed in the Dedicated Assets (€5,229m at 31/12/2015)
- Pari passu disposal

Financial impact of the partial disposal project

- Reduction of the financial debt in the amount of the receivable not placed in the Dedicated Assets
- Reinvestment in the Dedicated Assets of the disposed Dedicated Assets component

(1) CSPE: *Contribution au Service Public de l'Électricité* - Compensation of public service costs

TURPE 5(1) transmission and distribution development

- Preparation of TURPE 5 for the 2017-2021 period as part of the end of TURPE 4:
  - Tariffs for the use of existing public power networks, known as “TURPE 4 HTB” for the transmission network and “TURPE 4 HTA/BT” for distribution networks, came into effect on 1 August 2013 and 1 January 2014 respectively, for a duration of approximately 4 years
- Publication by the CRE(2) of the draft decisions on TURPE 5 HTB and HTA-BT:
  - The CRE published its deliberations of 19 October 2016 concerning draft decisions. These will be reviewed by France’s Higher Energy Board (*Conseil Supérieur de l’Energie*) before the CRE makes its final decision before the end of 2016
  - The draft decisions foresee the synchronised entry into effect of the TURPE 5 HTB and HTA/BT on 1 August 2017

22 July 2015 – 25 September 2015	24 May 2016 – 24 June 2016	27 July 2016 – 16 September 2016	19 October 2016	End of 2016
1st public consultation by the CRE on the tariff structure	2nd public consultation by the CRE on the tariff structure	Consultations by the CRE on the final tariff table version, the tariff level and the authorised DSO(3) and TSO(3) revenues	CRE deliberation on the draft decision for the TURPE Transmission and Distribution	CRE decision on TURPE after consulting the Higher Energy Board

(1) TURPE: *Tarif d’utilisation des réseaux publics d’électricité* (public electricity network access tariff)
(2) CRE: *Commission de Régularisation de l’Énergie,* Energy Regulation commission
(3) DSO: Distribution Service Operators; TSO: Transmission Service Operators

Capacity certification market in France: launch contemplated for 1 January 2017

8 November 2016: mechanism approved by the European Commission

- Changes to the capacity mechanism rules as part of the in-depth investigation by the European Commission (EC) of its compliance in terms of State aid
  - Immediate adjustments relating to supervision of market players and market efficiency (transparency, liquidity)
  - Future adjustments to come relating to new entrants and eligibility of foreign capacities
- RTE public consultation on the new rules concluded on 26 October 2016
- Expected publication of the rules by ministerial order, after the opinion of the Higher Energy Council and the CRE

The first auction of capacity certificates is planned by EPEX Spot for 15 December 2016

- First auction will be held on the 2017 product
- Other auctions on the 2017 product and the products of the following years are planned in 2017
- Once started, approximately 15 auctions will be held over the four years before the delivery year, then 1 auction during the delivery year and finally 1 during each of the following two years

To date, EDF certified 78GW capacity for 2017

- Only one part of the certified capacity will be able to be monetised
  - ARENH volumes (taken up or integrated into blue tariff sales) are delivered with capacity certificates attached

ARENH: proposed clarifications to the subscription terms (1/2)

- The regulated access to electricity from existing nuclear fleet (“ARENH”) was established in 2011 to allow alternative suppliers:
  - To benefit from electricity supply "at economic conditions equivalent to those resulting for EDF from the use of its nuclear plants”
  - In order to supply their portfolio of end-customers whose consumption gives rise to ARENH volume “rights”
  - Under an annual product
- The texts currently governing ARENH enable unintended arbitrage possibilities for alternative suppliers in the current context marked surging wholesale power prices resulting from low availability of the nuclear fleet:
  - Option for alternative suppliers to request ARENH volumes for 2017 at a price of 42 €/MWh and sell these volumes on the wholesale market at higher prices over the first quarter or the first semester of 2017
  - Whereas ARENH is an annual product and supply of end-customers’ portfolios over the year 2017 has been mostly hedged throughout 2015 and 2016 at more favourable wholesale prices than the ARENH price
- To prevent this unintended use of the ARENH mechanism, the Government submitted two proposals to amend the unintended biases of the regulations and avoid speculative behaviors

ARENH: proposed clarifications to the subscription terms (2/2)

	Proposed clarification	Implications for 2017 ARENH subscriptions
To prevent "quarterly" arbitrage	▪ Ministerial order to revise the ARENH framework agreement, based on a proposal from CRE approved on 7 November ▪ Limits the possibilities of early termination of the agreement	▪ The following arbitrage between ARENH and market prices would no longer be possible: □ ARENH subscription for 2017 and monetisation of Q1 volumes to capture the difference between current Q1 2017 contracts prices and the ARENH price □ Termination of the agreement to forgo Q2, Q3 and Q4 volumes that trade on average below ARENH price
To prevent "bi-annual" arbitrage	▪ Proposal released on 7 November to clarify the terms of the so-called "monotony" clause in the ARENH decree ▪ Specifies that the lack of subscription or agreement in one 6-month period is considered as a zero volume subscription, making it no longer possible to request ARENH volumes for the following 6-month period and reducing volumes thereafter	▪ The following arbitrage between ARENH and market prices would no longer be possible in case there was no agreement or subscription in H2 2016 □ ARENH subscription for 2017 and monetisation of H1 volumes to capture the difference between current H1 2017 contracts prices and the ARENH price □ Reduction of subscription for H2 2017 that trades on average below ARENH price

⇨ A request for ARENH volumes in H1 2017 would effectively be a request for at least the same volumes in H2 2017, in line with the annual nature of the ARENH contract

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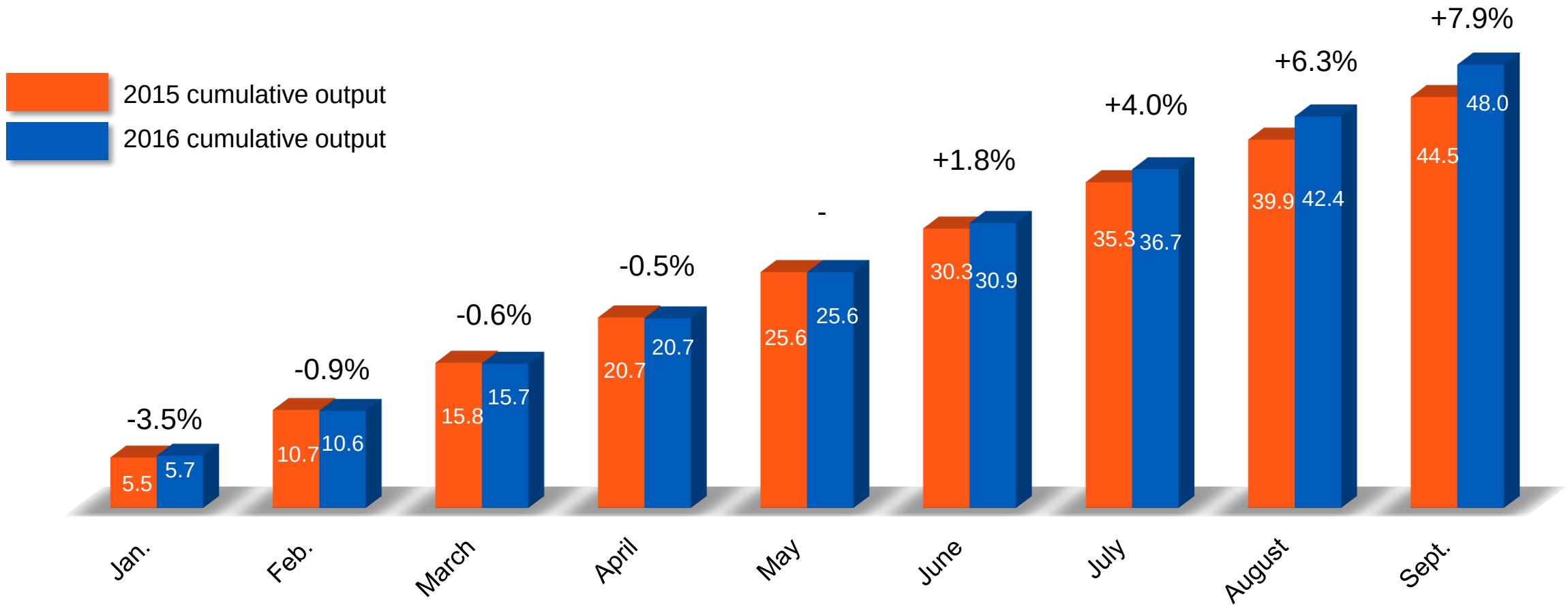
International

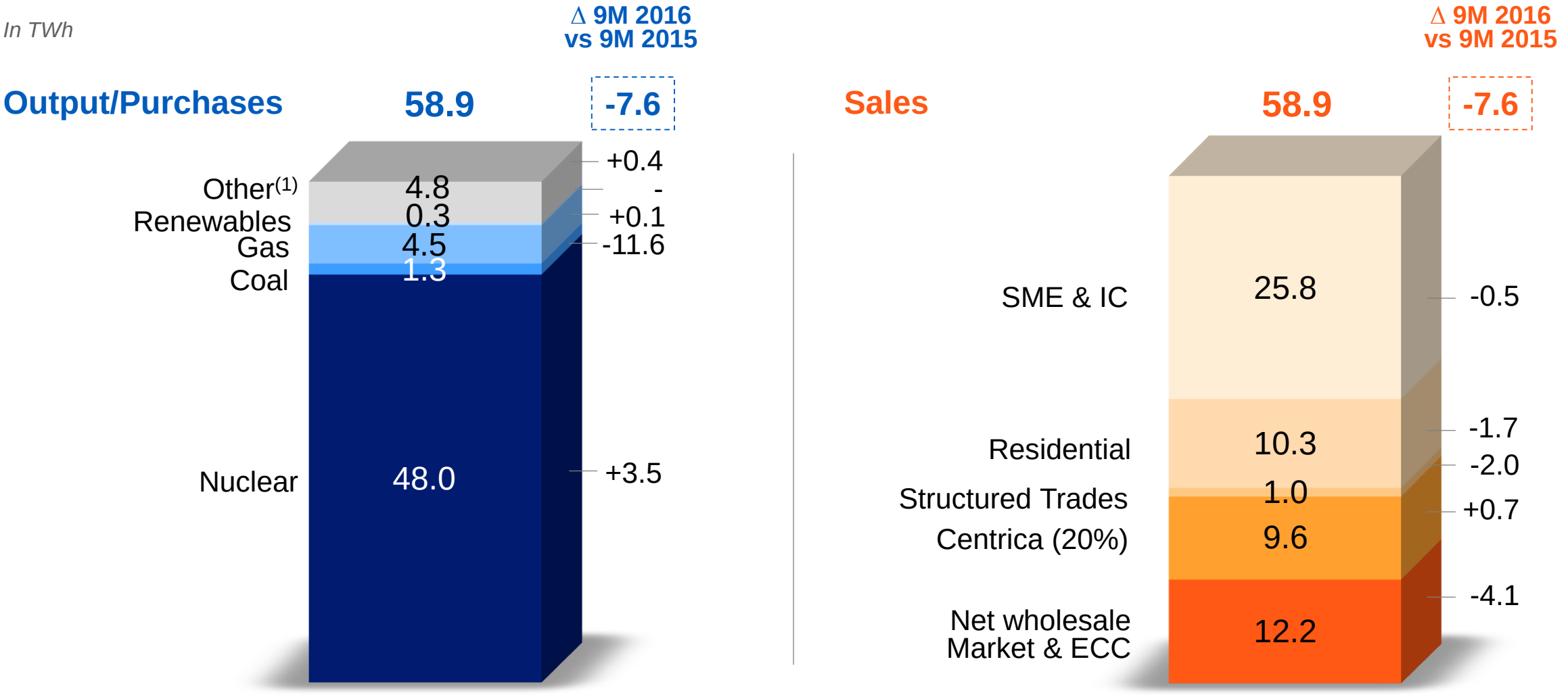
United Kingdom: monthly nuclear output

In TWh



United Kingdom: upstream/downstream electricity balance

In TWh

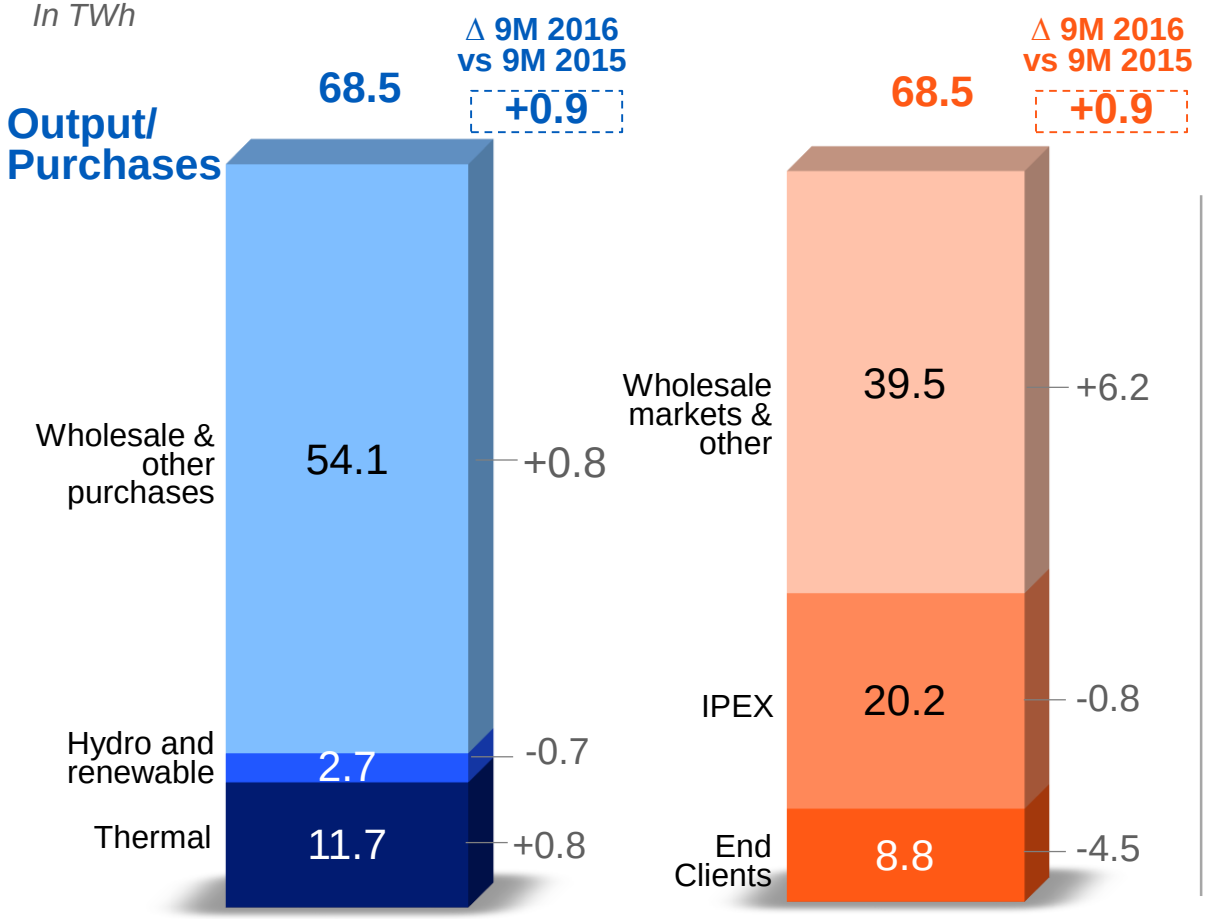


(1) Including wind output and purchase obligations

Edison: upstream/downstream electricity and gas balances

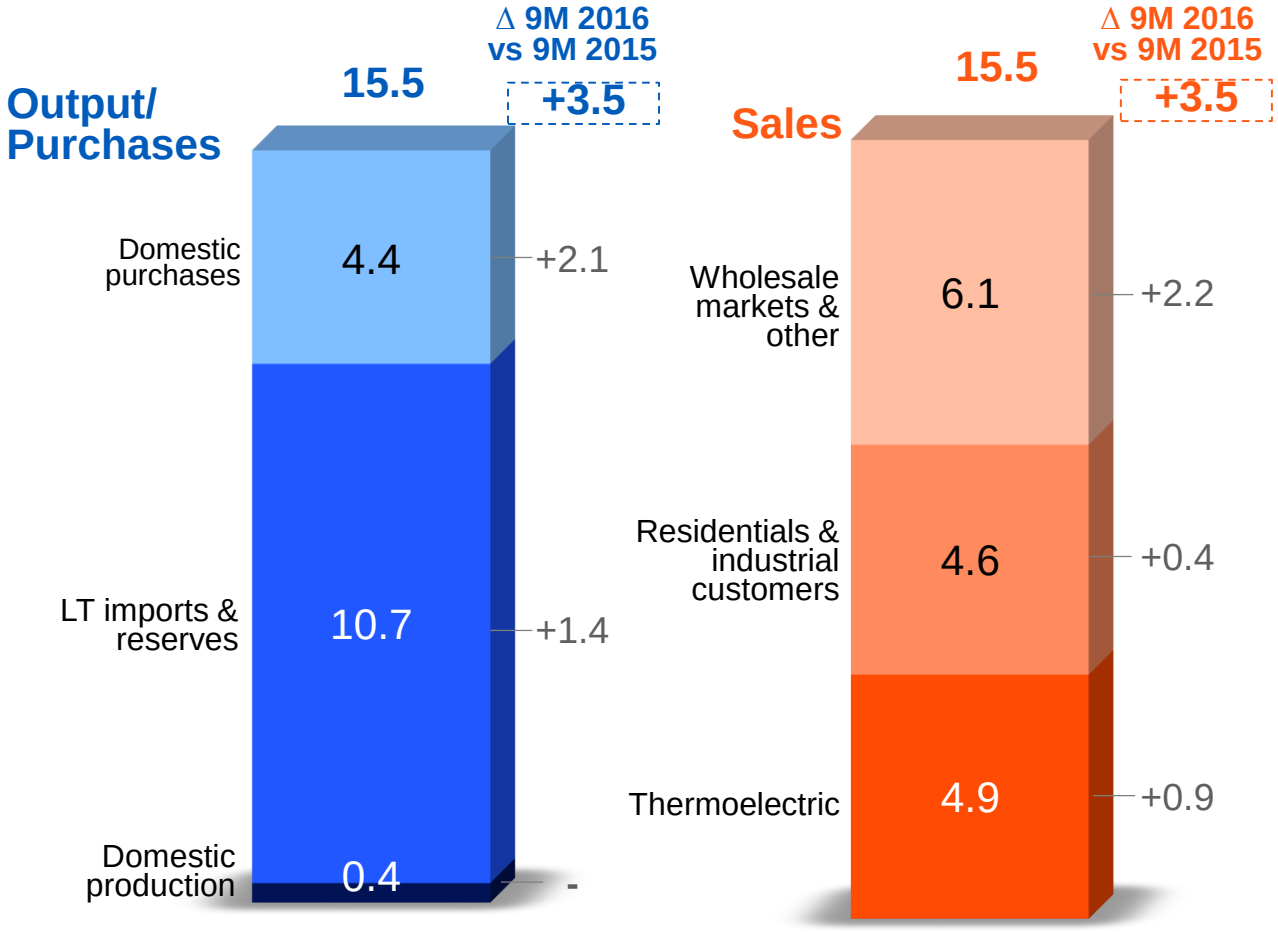
Electricity(1)

In TWh



Gas

In bcm



(1) Excluding trading volumes

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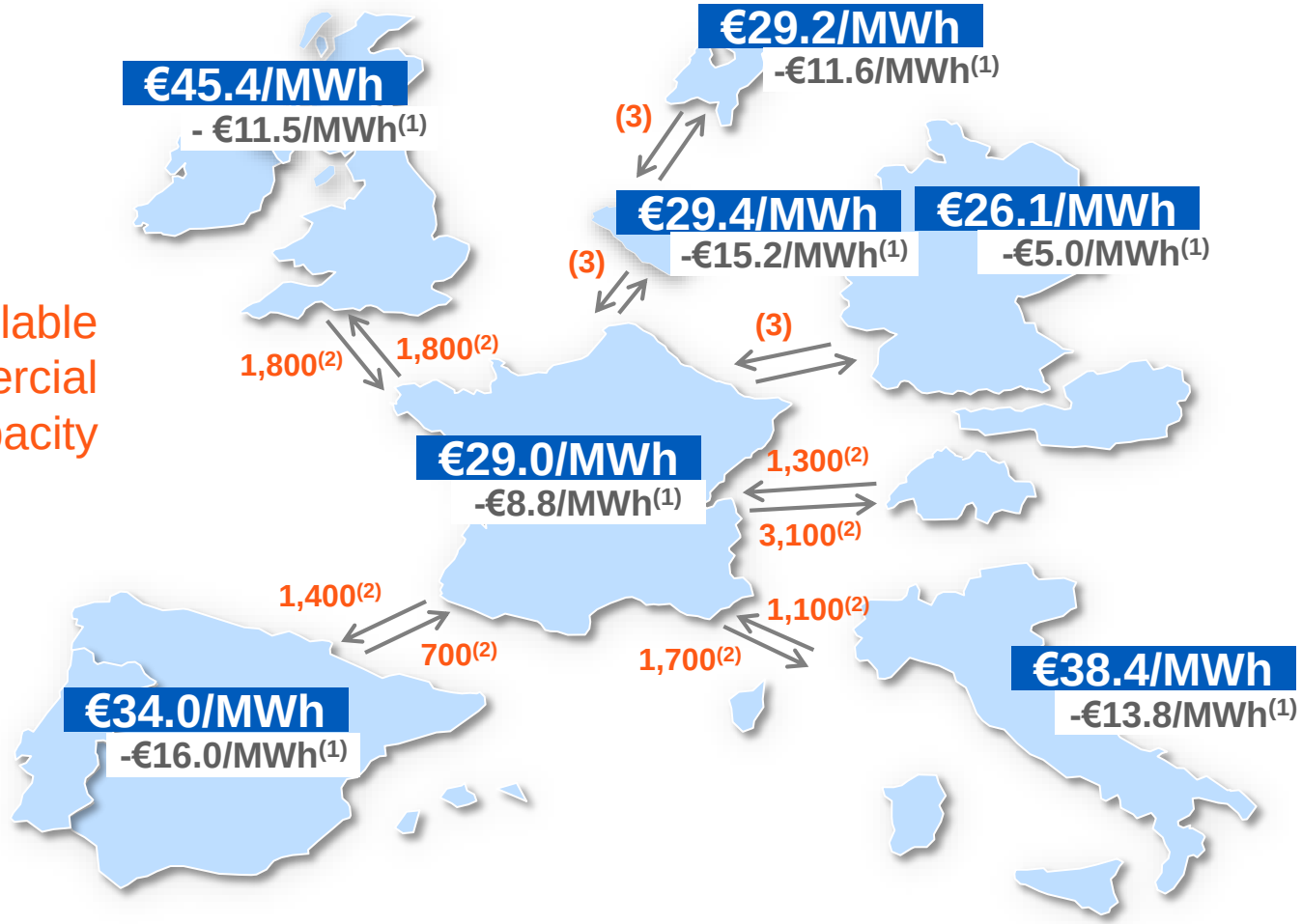
Markets

Average spot prices in 9M 2016



- Prices: average spot price for 9M 2016 for France and Germany (Epex), the United-Kingdom (N2EX), Spain (OMEL), the Netherlands (APX), Belgium (Belpex) and Italy (GME)
- A decline in general prices in Europe, in a commodities price drop context
- An interconnected European market for electricity, but with separate price zones
- Market coupling is limited by the capacities available at the borders. The average price differences noted in the CWE zone are less pronounced since the introduction of the flow-based method

(1) Change compared to average prices in 9M 2015
(2) Average annual NTC (Net Transfer Capacity) as calculated by RTE in December 2015 for 2016
(3) Implementation of the flow-based coupling mecanism from 21 May 2015 for all CWE (France, Benelux, Germany)

French power trade balances at its borders

In TWh[1]		9M 2015 Q1	9M 2015 Q2	9M 2015 Q3	9M 2015 Total	9M 2016 Q1	9M 2016 Q2	9M 2016 Q3	9M 2016 Total
CWE[2]	exports	3.9	7.1	7.6	18.7	1.8	5.6	2.2	9.7
	imports	5.7	3.5	2.0	11.2	4.9	2.0	3.3	10.2
	balance	-1.8	3.6	5.6	7.4	-3.1	3.6	-1.0	-0.6
United Kingdom	exports	3.8	4.3	4.3	12.4	4.3	3.9	3.5	11.7
	imports	0.6	0.2	0.3	1.1	0.3	0.2	0.8	1.3
	balance	3.2	4.0	4.1	11.3	3.9	3.7	2.7	10.3
Spain	exports	1.4	2.2	1.9	5.5	2.8	2.9	4.2	9.9
	imports	1.1	0.2	0.1	1.4	1.7	1.4	0.3	3.4
	balance	0.3	2.0	1.8	4.1	1.1	1.5	3.9	6.4
Italy	exports	5.8	4.2	4.2	14.3	6.1	4.6	4.2	14.9
	imports	0.2	0.1	-	0.3	-	0.1	0.2	0.3
	balance	5.6	4.2	4.2	14.0	6.1	4.5	4	14.6
Switzerland	exports	6.6	6.4	5.9	19.0	6.6	4.1	2.4	13.1
	imports	2.2	4.6	3.9	10.7	0.8	2.5	2.2	5.6
	balance	4.5	1.8	2.1	8.3	5.7	1.7	0.2	7.5
TOTAL	exports	21.5	24.3	24.1	69.8	21.5	21.2	16.6	59.3
	imports	9.7	8.7	6.3	24.7	7.8	6.3	6.8	20.9
	balance	11.8	15.5	17.7	45.1	13.7	14.9	9.8	38.4

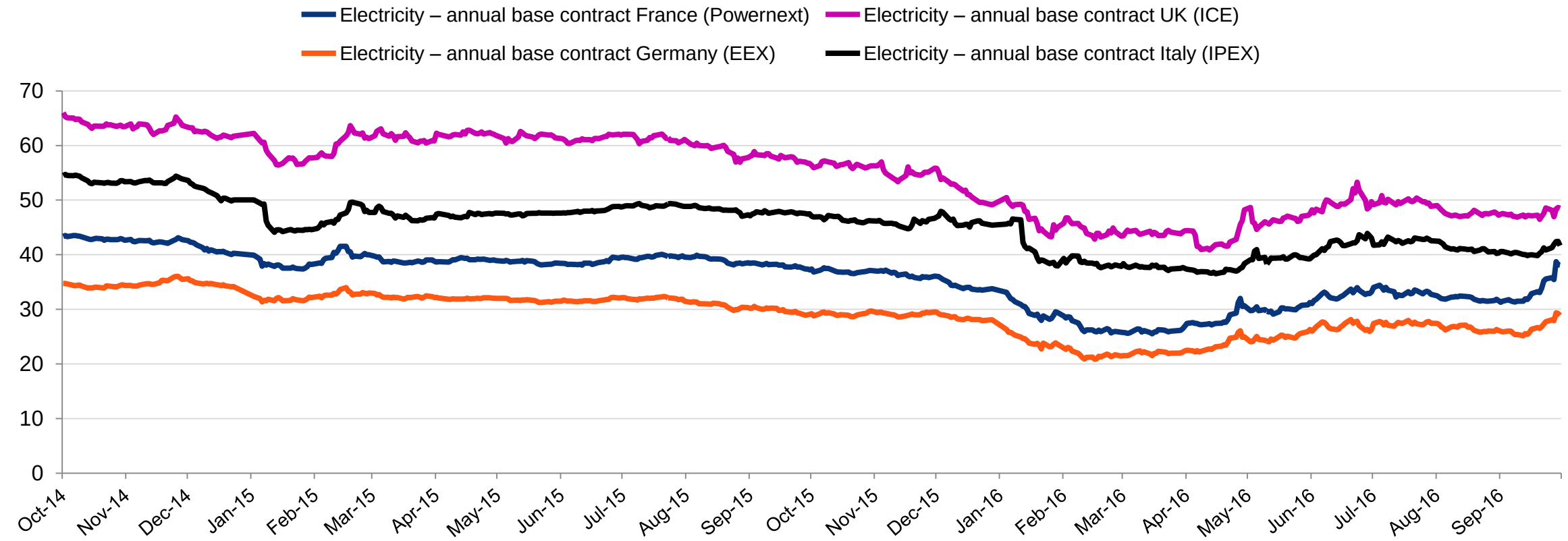
Source: RTE

(1) Rounded to the nearest tenth

(2) CWE flow-based coupling zone composed of Germany, Belgium, France, Luxembourg and the Netherlands, set up in May 2015

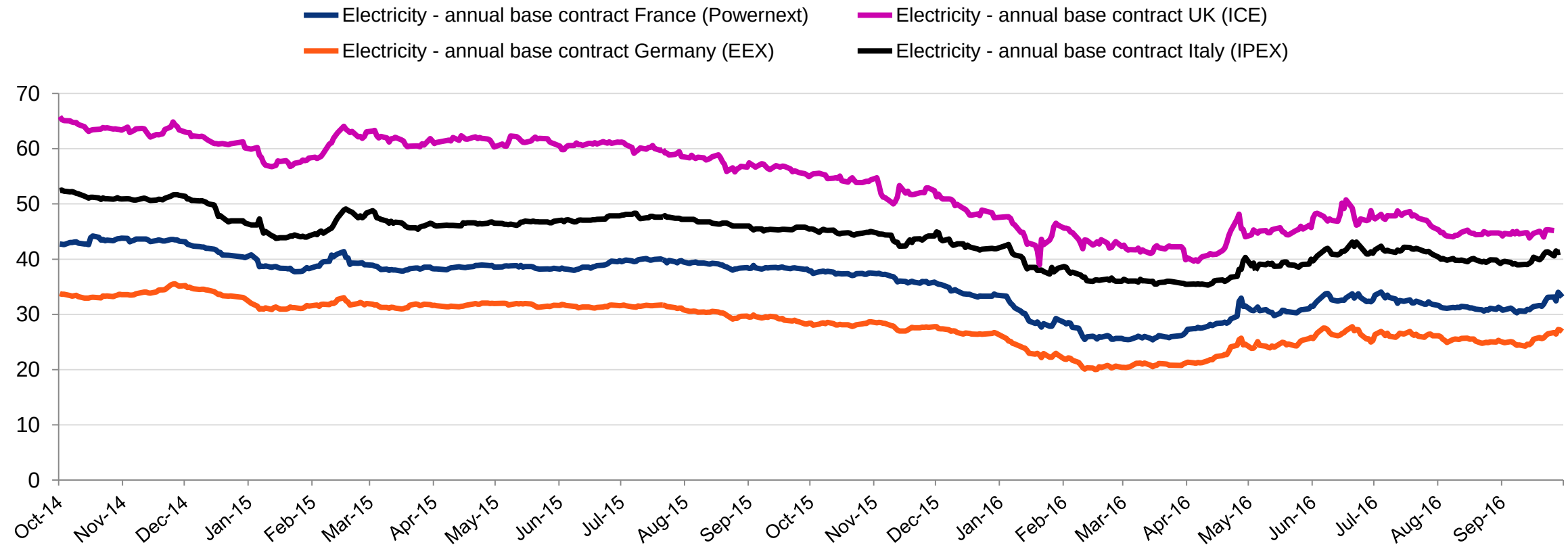
Forward electricity prices in France, the UK, Italy and Germany (Y+1) from 01/10/2014 to 30/09/2016

In €/MWh



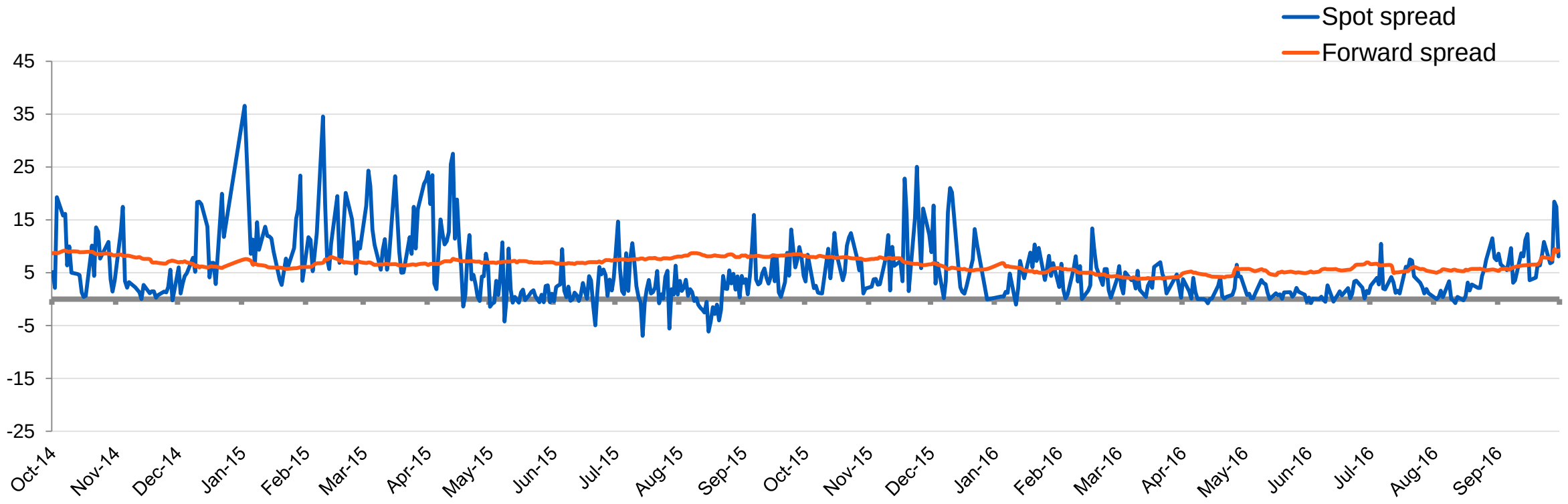
Forward electricity prices in France, the UK, Italy and Germany (Y+2) from 01/10/2014 to 30/09/2016

In €/MWh



France/Germany spread from 01/10/2014 to 30/09/2016

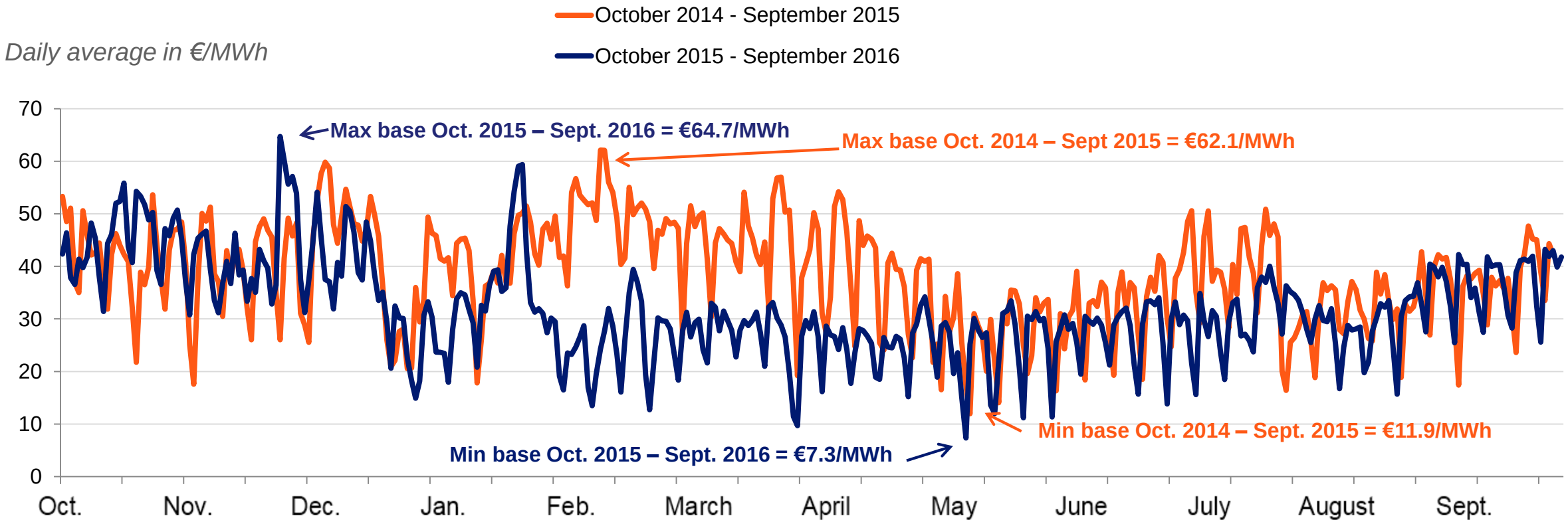
Daily average in €/MWh



Note: Over the observed period, the France/Germany spread reached its minimum on the 14 July 2015 at -€6,95/MWh, and its maximum on 2 January 2015 at €36,55/MWh

France: baseload electricity spot prices

Daily average in €/MWh

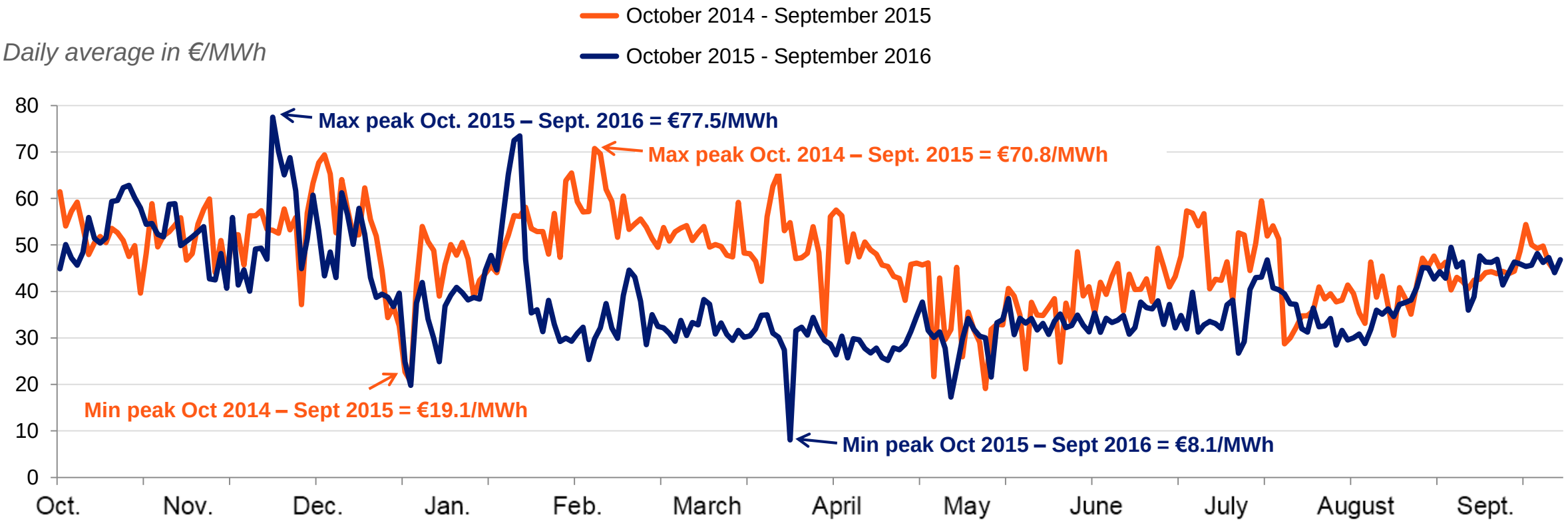


Decrease of the average baseload spot price to €29.0/MWh for the first nine months, down €8.8/MWh compared to 2015, due to lower fuel prices, mild weather early in the year and increased renewable energy generation.

Source: EPEX

France: peakload(1) electricity spot prices

Daily average in €/MWh



The average peak electricity spot price for 9M 2016 was €35.4/MWh, a €10.1/MWh decrease compared to 2015.
This drop is due mainly to lower fuel prices, mild weather conditions
early in the year and a higher renewable generation.

Source: EPEX

(1) Electricity delivery from Monday to Friday between 8am and 8pm

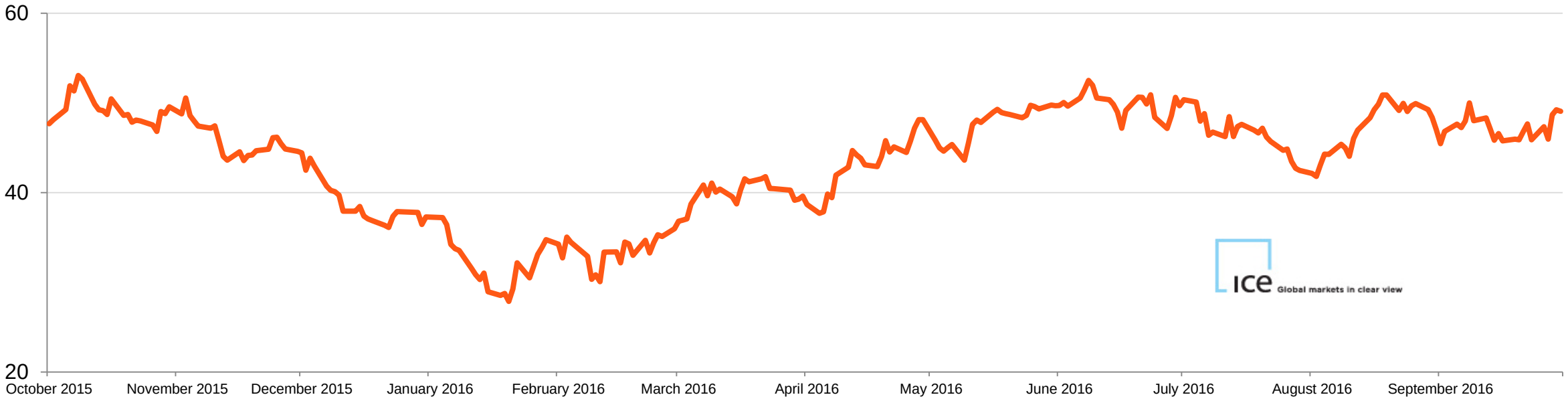
Coal prices (Y+1) from 01/10/2015 to 30/09/2016

In $/T

The forward coal price was $49.0/t in 9M 2016, representing a 15% drop (-$8.4/t) compared to last year, due to a decrease in demand in China and to the drop in oil prices, impacting extraction costs. However, prices went up again due to a drop in the supply from China.
The forward coal price for delivery in 2017 was $62.5/t at the end of the quarter.

Brent prices(1) from 01/10/2015 to 30/09/2016

In $/bbl



The average Brent price was $43.2/bbl, down 24% from the average price in 9M 2015. This price drop is due to plentiful supply and stable global demand.
However, the OPEC member states have reached an agreement to freeze daily output, the details of which will be discussed in November, leading to a rise in prices at the end of the period.
The price of oil ended the month of September at $49.1/bbl.

(1) Brent spot price (M+1)

Gas prices(1) (Y+1) from 01/10/2015 to 30/09/2016

In €/MWh

The price of annual natural gas contract in France was down €6.3/MWh compared to the previous period, to reach an average price of €14.9/MWh. This 30% decrease is due to lower oil prices and to the relatively abundant supply of natural gas in the European plate.
The price of annual natural gas ended the month of September at €16.1/MWh.

(1) Price of France PEG Nord gas

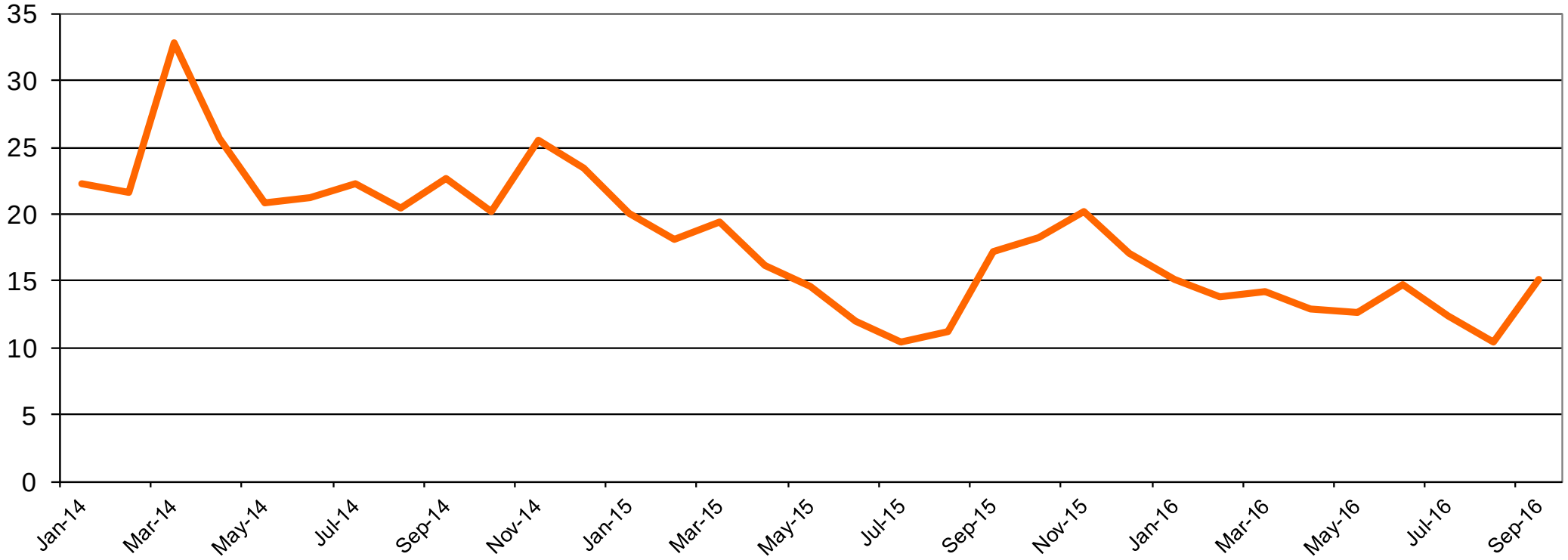
CO_2 prices (Y+1) from 01/10/2015 to 30/09/2016

In €/t

The price of the emission certificate for delivery in December 2017 was €5.4/t over 9M 2016 on average, down 29% compared with the same period last year.
This drop is due to lower quota demand due to a decrease in coal-fired generation.
Prices ended the month of September at €5.0/t.

Clean dark spread(1) in the UK (*day ahead*)

In £/MWh

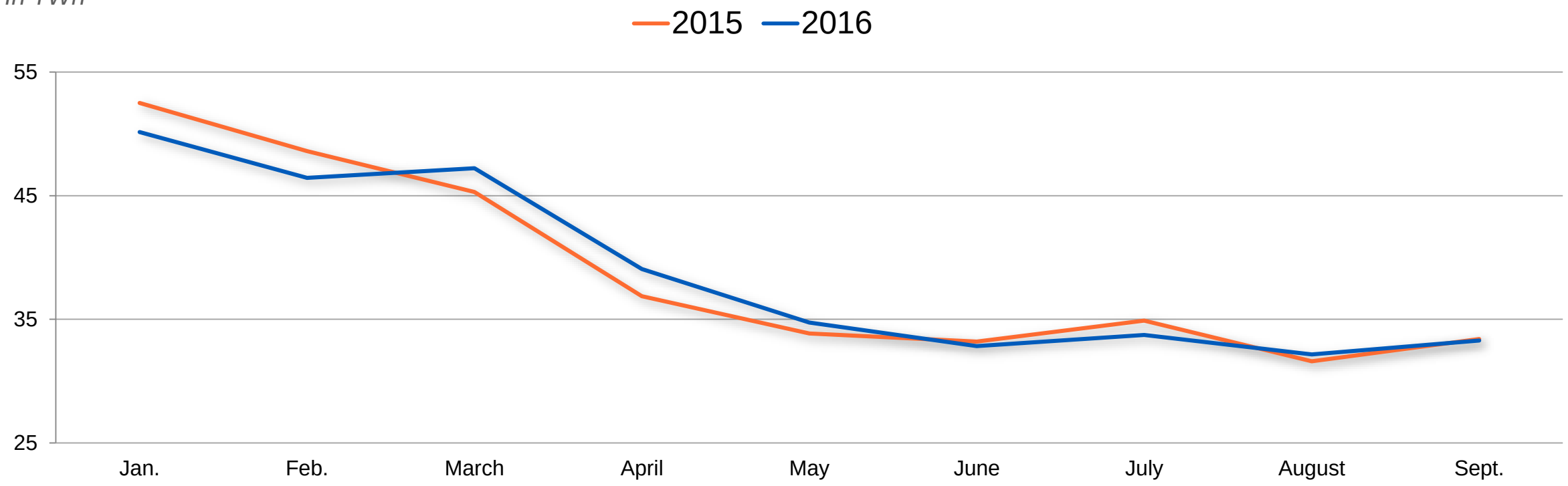


Market spread =
- *+ Electricity price*
- *– API 2 Price x market estimate of the coal volume / MWh of electricity*
- *– (EUA price + Governmental tax price) x market estimate of carbon emissions / MWh of electricity*

(1) Spread of a coal-fired plant running at full capacity, including the cost of coal and CO_2 emissions (excluding green certificates), assuming the market is efficient

France: electricity consumption

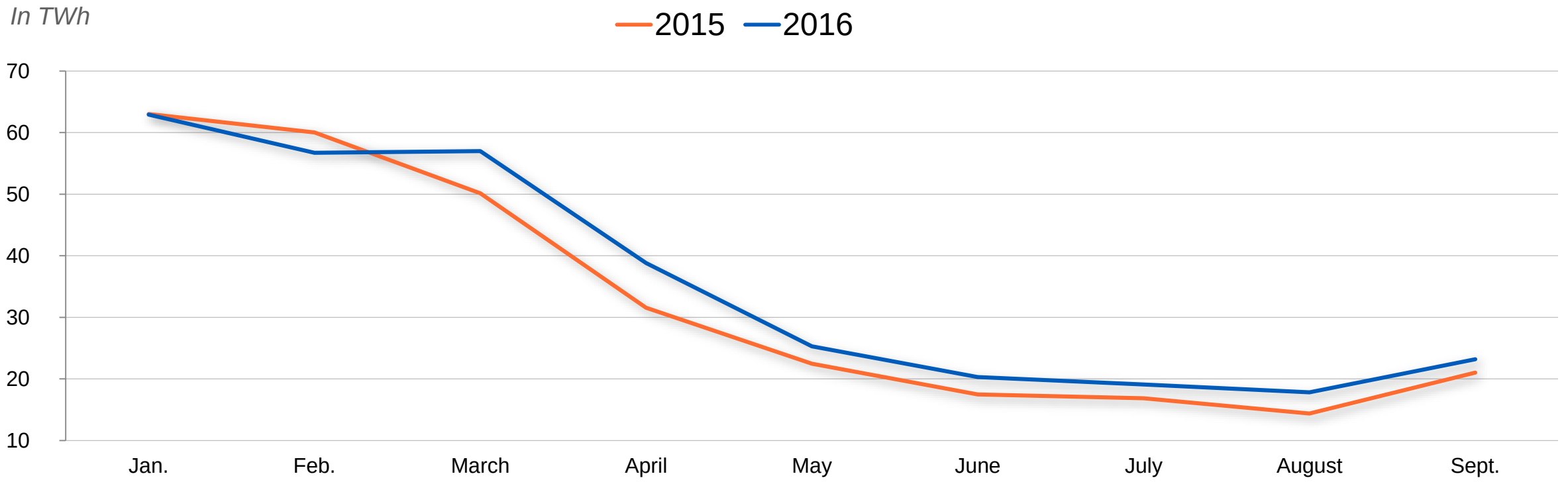
In TWh



Electricity consumption decreased slightly compared to 9M 2015 (-0.2%) in France, due in particular to mild weather conditions early in the year

Source: RTE

France: gas consumption

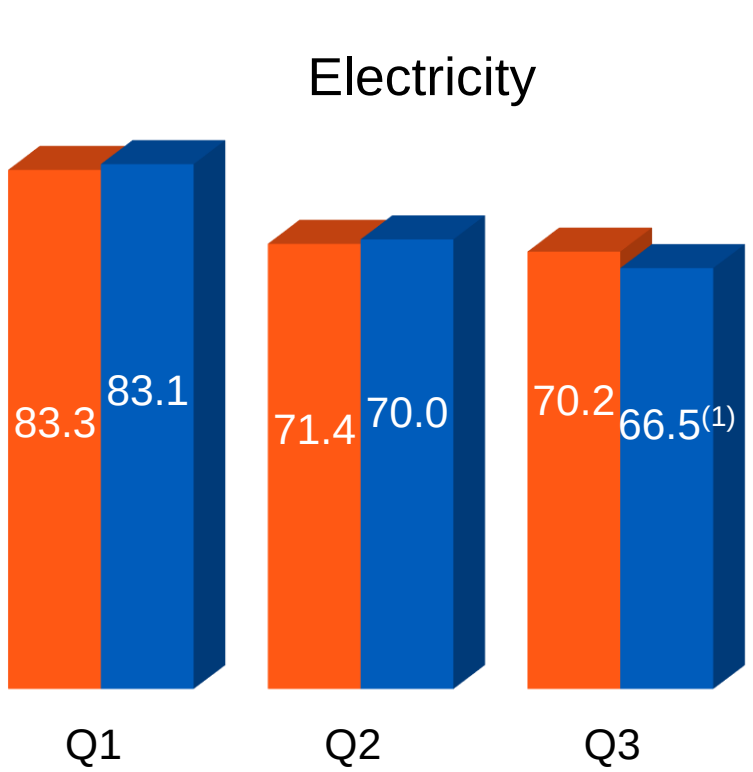


Increase in gas demand (+2.8% vs. 9M 2015),
mainly due to weather conditions.

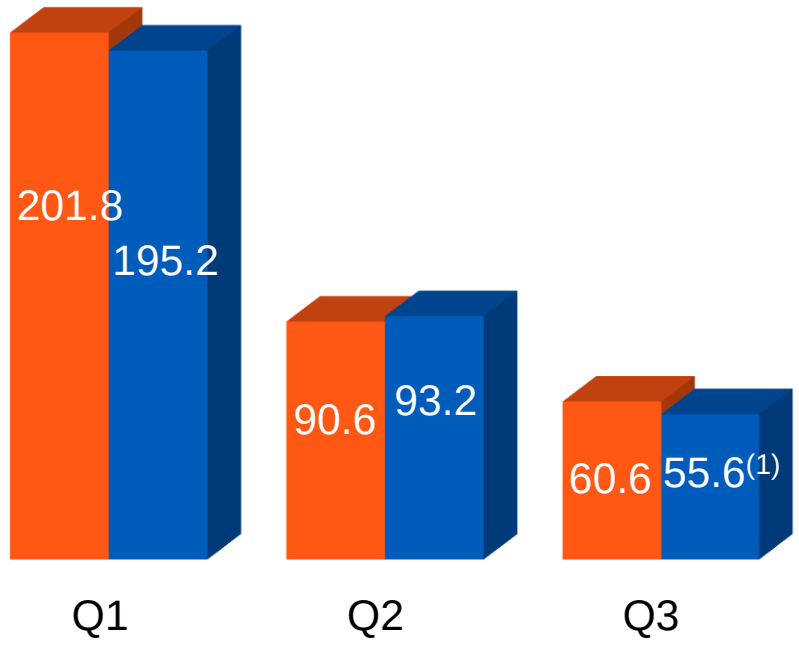
Source: Smart GRTgaz and TIGF

United Kingdom: electricity and gas consumption

In TWh



Electricity consumption decreased (-4.3TWh, or -1.9% vs. 9M 2015), mainly due to higher energy efficiency and a lower production.

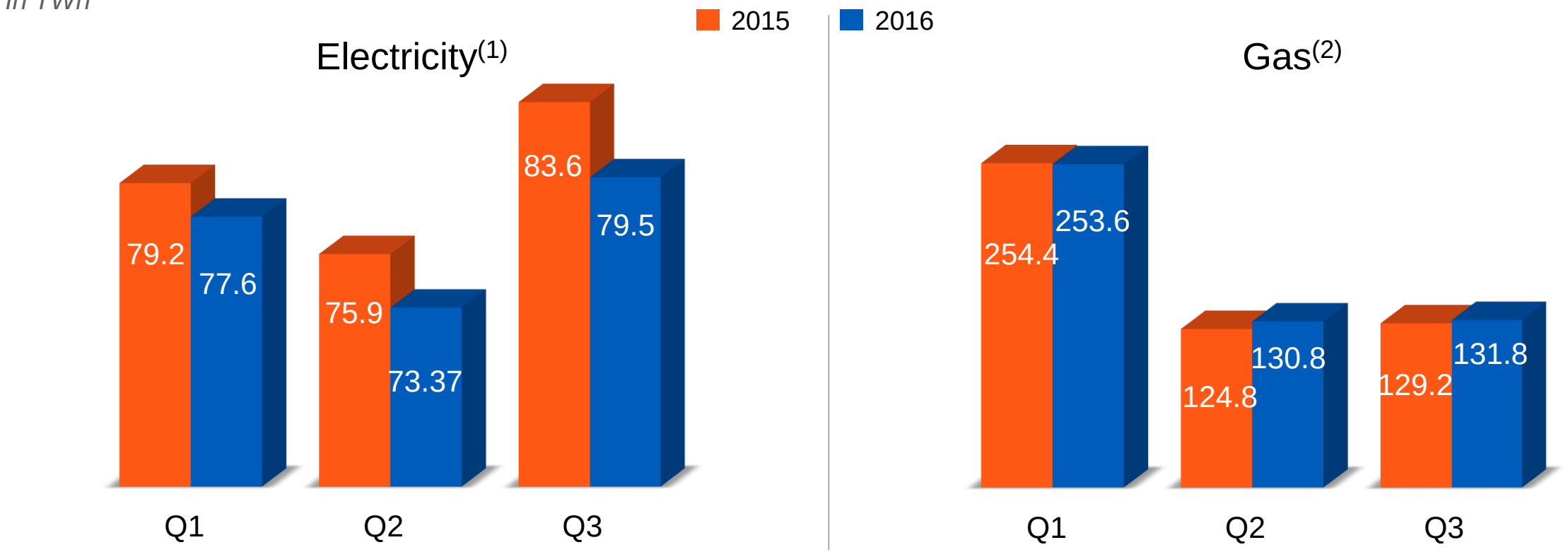


Gas consumption decreased (-9TWh, e.g. -2.5% vs. 9M 2015) due to lower temperatures and higher energy efficiency.

Source: BEIS (Historical data revised every quarter)
(1) Estimates from EDF Energy

Italy: electricity and gas consumption

In TWh



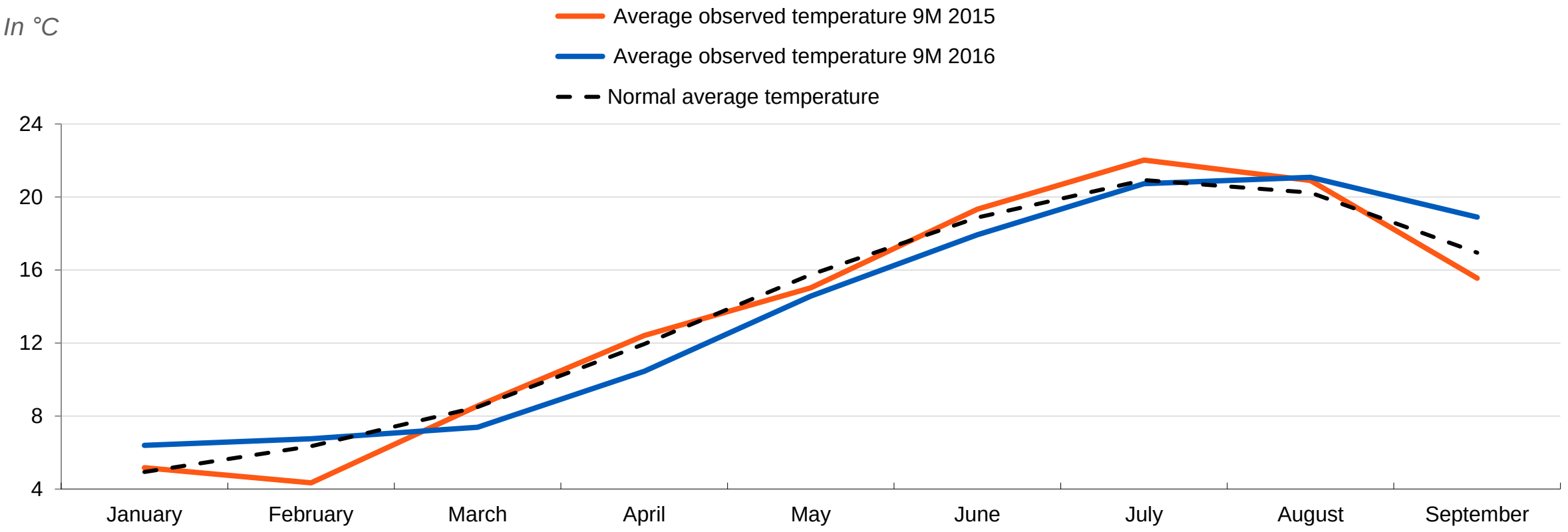
Electricity consumption was down (-3.4%) because of unfavourable weather conditions in Q3. The increase in wind generation was partially offset by lower hydropower and thermoelectric generation.

Gas demand increased by +1.5% due to increased use of gas by plants caused by lower hydropower and coal generation.

(1) Source: Terna data restated by Edison
(2) Source: Ministry of Economic Development (MSE), Snam Rete Gas data restated by Edison on the basis of 1 Bcm = 10.76TWh

Average monthly temperatures(1) in France

In °C



Average temperatures in 9M 2016 have remained relatively stable (+0.1°C) compared to 2015, but with milder temperatures in January and February.

Source: Météo France
(1) Data based on a basket of 32 cities

SALES AND HIGHLIGHTS

2016

THIRD QUARTER

Appendices