

BIP AutoObserver

Analysis of new car registrations

April 2023



Executive Summary

Analysis of new car registrations in Europe & Italy – April 2023



Europe*

+16,1%

Top Countries by growth of new registrations: 26 countries grew in April 2023 compared to April 2022, the highest rates for Croatia (+44,0%), Belgium (40,4%) and Netherlands (+35,2%). Only 5 Countries decreased, Malta the only one in double digits (-14,0%).

Top 3 Countries by market share: Germany 20,7% (-1,8 p.p.), UK 14,9% (0,0 p.p.) and France 13,2% (-0,1 p.p.) in April 2023 YTD compared to April 2022 YTD.

Brands: among the **Top 15 by volume**, the highest growth comparing April 2023 to April 2022 for Dacia (+44,6%), Skoda (+41,4%) and Renault (+35,9%), while highest decrease for Citroen (-8,0%) and Fiat (-6,8%)

Premium brands:** all 3 Premium brands increased both in the month of April 2023 and YTD, Audi (+25,8% monthly and +20,8% YTD), Mercedes (+2,5% monthly and +10,3% YTD) and BMW (+1,1% monthly and +4,0%YTD)



Italy

+ 29,2%

Areas monthly results: North-East +40,9%, North-West +24,6%, Center +28,1%, South +14,5% and Islands +13,4%, comparing April 2023 to April 2022

Customer segments: Retail +11,5%, Fleet +71,3% and Business +18,0% April 2023 vs April 2022

Brands: considering YTD results, among the **Top 15 by volume** all the brands registered an increase, the highest for **Jeep** (+51,1%) and **Renault** (+42,9%)

Premium brands:** all Premium brands increased in April 2023 compared to April 2022 both monthly and YTD: Audi (+42,8% monthly and +34,8%YTD), BMW (+23,8% monthly and 19,9% YTD) and Mercedes-Benz (+14,6% monthly and +21,1% YTD)



01. Europe

- | Market overview
- | New car registrations by brands

02. Italy

03. New car models launches in Italy

04. Commercial & Industrial Vehicles

05. News on key industry trends

Europe | Market Overview

Top 10 European Markets* – April 2023

European Markets*
new car registrations

2022

831.014

2023

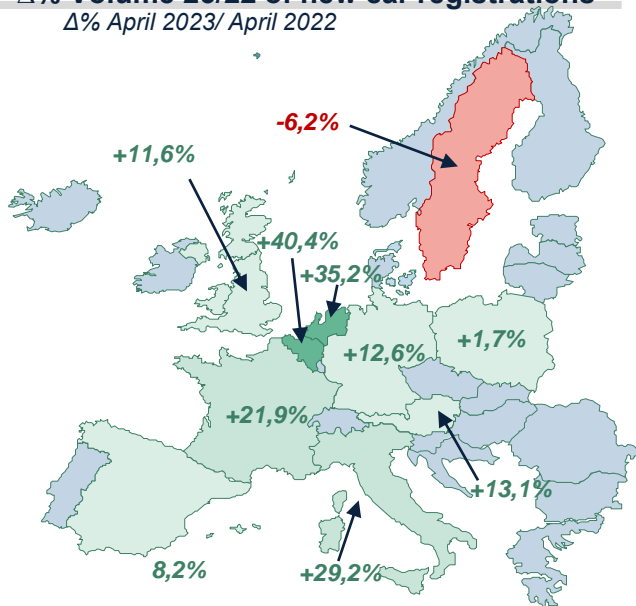
964.932

+16,1%



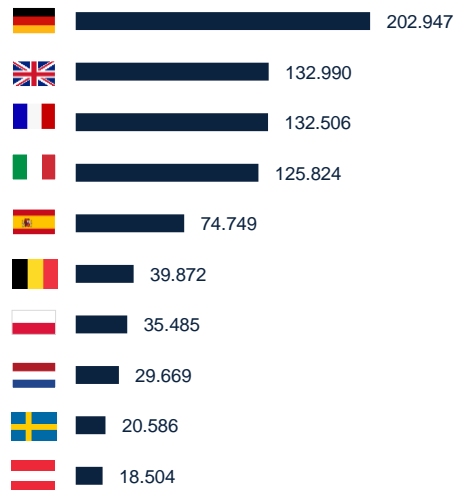
Δ% Volume 23/22 of new car registrations

Δ% April 2023/ April 2022



Number of EU new car registrations 2023

New car registration April 2023



! Highlights

- The European market (EU+UK+EFTA) **registrations** increased from 831.014 in April 2022 to 964.932 cars in April 2023
- In line with the previous months, the **EU car market confirmed an overall increase in registrations**
- The **highest rates** among the top 10 markets for:
 - Belgium (+40,4%)
 - Netherlands (+35,2%)
 - Italy (+29,2%)
- Sweden** is the only market, among the top 10, that **decreased (-6,2%) in April 2023** compared to April 2022

Europe | Market Overview

Top 10 European Markets* – April 2023 YTD

European Markets*
new car registrations

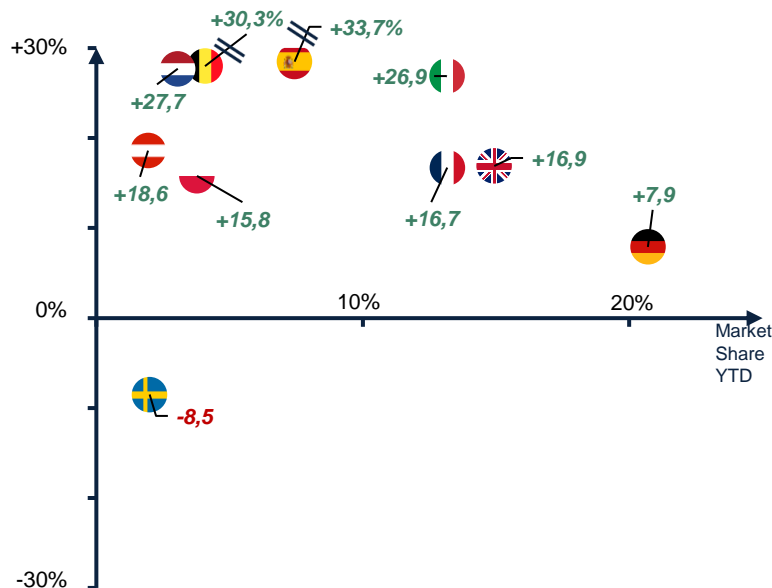
2022	3.585.944
2023	4.201.918

+17,2%



Highlights - Δ% Volume 23/22 & Market Share (MS)

Δ % Volume April 23/22



#	Country	MS April 2023 YTD	Δ VS 2022	Sales Volume April 2023 YTD
1	GER	20,7%	+7,9%	869.765
2	UK	14,9%	+16,9%	627.250
3	FRA	13,2%	+16,7%	553.393
4	ITA	13,2%	+26,9%	552.853
5	SPA	7,4%	+33,7%	312.314
6	BEL	4,1%	+30,3%	171.356
7	POL	3,8%	+15,8%	158.516
8	NET	3,0%	+27,7%	128.094
9	SWE	2,0%	-8,5%	83.890
10	AT	1,9%	+18,6%	81.556

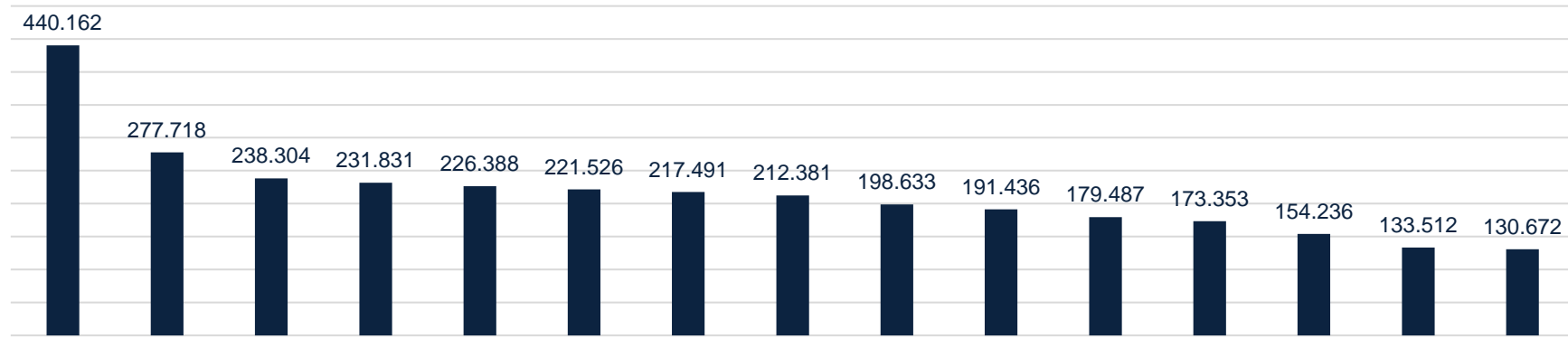
! Highlights

- Considering YTD results, **28 countries out of 31 increased in April 2023** compared to April 2022 YTD, with significant results for **Portugal** (+44,2%), **Greece** (+38,8%) and **Croatia** (+38,8%). Only 3 countries decreased, Norway the only one in double digits (-10,5%)
- Regarding the top 10 countries, **Germany** still led with a Market Share of 20,7%, followed by UK, France and Italy

Europe | New car registrations by brand



Top 15 – April 2023 YTD



Δ Vol. 23/22	+25,2%	+13,7%	+20,8%	+11,1%	+10,3%	31,7%	+4,0%	+19,9%	+2,9%	+42,4%	+3,3%	+4,9%	+9,2%	+3,9%	+2,9%
MS '22	10,5%	6,6%	5,7%	5,5%	5,4%	5,3%	5,2%	5,1%	4,7%	4,6%	4,3%	4,1%	3,7%	3,2%	3,1%
Δ MS 23/22	+7,14%	-2,94%	+3,64%	-5,17%	-5,26%	+12,77%	-10,34%	+4,08%	-12,96%	+24,32%	-10,42%	-10,87%	-5,13%	-11,11%	-11,43%



Source: ACEA

(*) Opel includes Vauxhall and Fiat includes Abarth New Car Registrations



01. Europe

02. Italy

- | Market overview
- | Market highlights
- | New car registrations by brand
- | New car registrations by group
- | New car registrations by fuel type
- | New car registrations by segment

03. New car models launches in Italy

04. Commercial & Industrial Vehicles

05. News on key industry trends



Italian Market – Variation of new car registrations 2023 vs 2022

April 2023 Highlights

Ninth consecutive month with an **increase in registrations**: **April 2023** records **+29,2%** (125.805) compared to April 2022 (97.365), bringing total 2023 registrations 2023 YTD to 552.850, **+26,9%** compared to 2022 YTD. The recovery is consolidated thanks to an **increase in offer** compared to 2022 affected by the supply chain crisis, but **registrations remain behind 2019**.

Growth is still led by the **fleet segment** which **increased its Market Share** compared to Private and Business, mainly thanks to the LTR cluster (+61,3% YTD compared to April 2022 YTD).

EVs decreased their Market Share in April 2023 compared to April 2022 (-1,0 p.p.), **losing share to LPG and Petrol** (+0,9 p.p. and +2,2 p.p. respectively).

In April 2023, all **geographical areas** registered a **double-digit increase**, the most significant for **North-East with +40,9%**.

Renault and **Peugeot** are the **two brands** with the **greatest growth** in April (+98,1% and 74,7%) while **considering YTD results Jeep, Volkswagen and Renault** are the brands with the highest increase. Among the top 15, significant results were also achieved by Lynk&CO, DR and Alfa Romeo.



■ 2021/2022 ■ 2022/2023

Italy | Market Overview

Italian Market – April 2023 vs April 2022

Italy New Car Registrations

2022 97.365

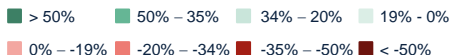
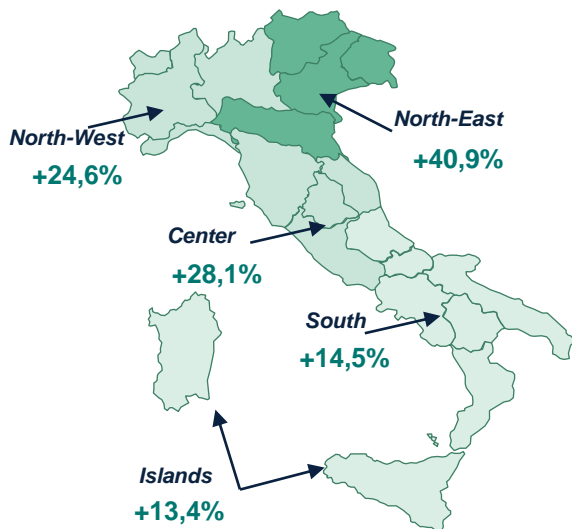
2023 125.805

29,2%



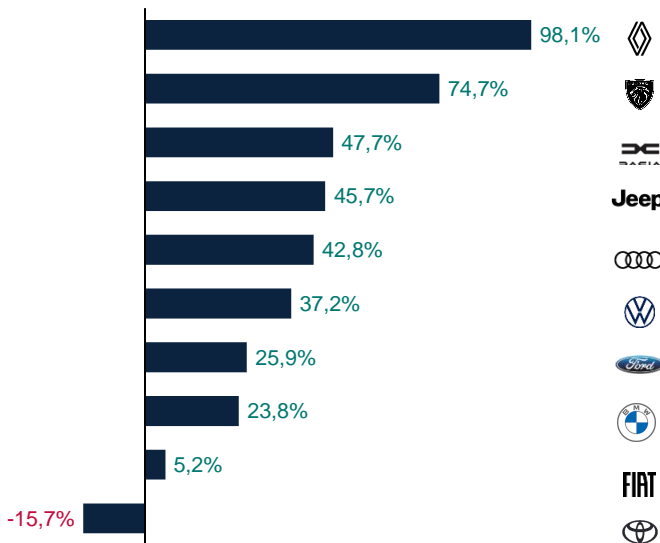
Δ% Volume 23/22 of New Car Registrations

Δ% April 2023/ April 2022



Growth of Top 10 Brands by Volumes

Δ% April 2023/ April 2022



! Highlights

- In **April 2023**, the Italian Market confirmed the positive result of March 2023, with an increase of +29,2% compared to April 2022
- **The highest growth for Renault** (+98,1%), **Peugeot** (+74,7%) and **Dacia** (+47,7%).
- Only Toyota decreased among the top 10 brands by volumes
- Every region of the **Italian Market** registered an increase, especially the North-East (+40,9%), the North-West (+24,6%) and the Center (+28,1%).
- **South and Islands**, although to a lower extent, also **showed an increase of** +14,5% and +13,4%

Italy | Market Overview

Italian Market – April 2023 YTD vs April 2022 YTD

Italy New Car Registrations (YTD)

2022
2023

435.681
552.850

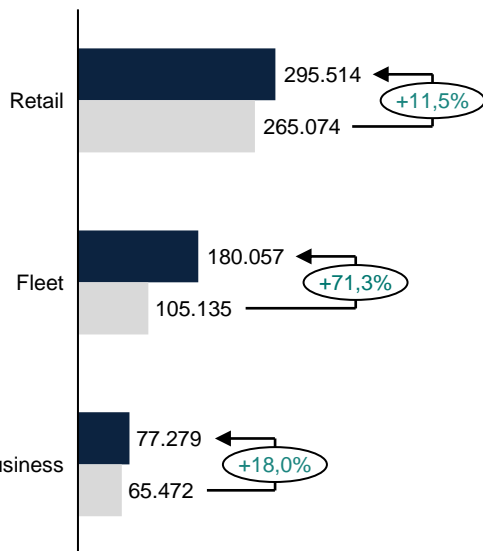
26,9%



Analysis by “Customer Segment”

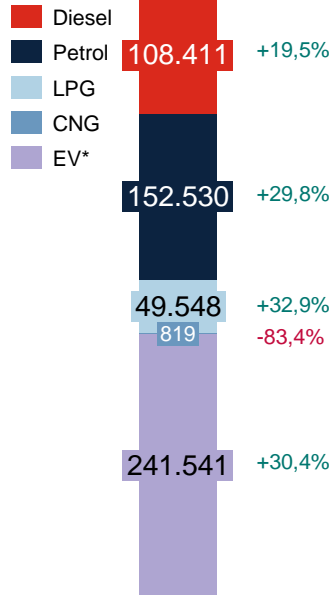
Registration YTD '23/'22

2022 2023



Analysis by “Fuel Type”

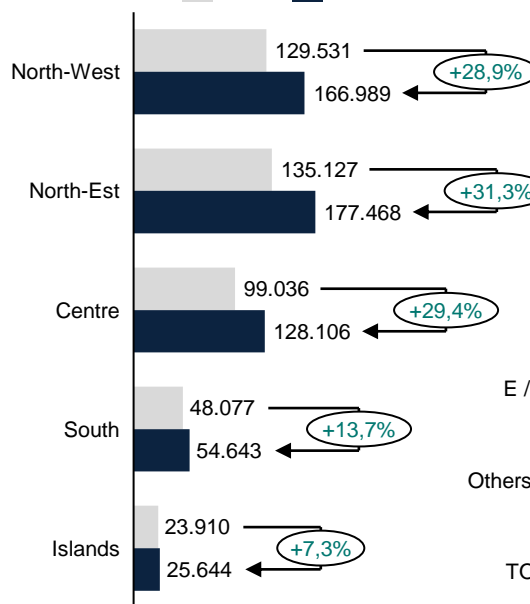
Registration YTD '23



Analysis by “Geographical Area”

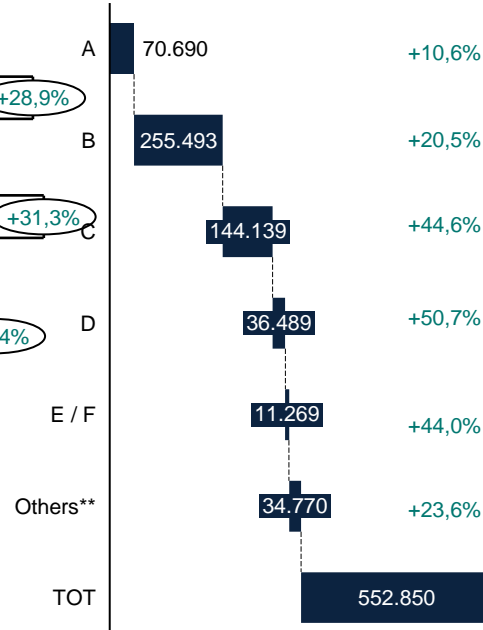
Registration YTD '23/'22

2022 2023



Analysis by “Car Segment”

Registration YTD '23/'22



Source: UNRAE

(*) EV: Electric Vehicle (Hybrid and Electric); CNG: Compressed Natural Gas (Methane and Ethanol) (**) Others: Station wagon, MPV, Sportive

Italy | Market Highlights

Italian Market – Distribution channels – April 2023 YTD vs April 2022 YTD

Italy New Car Registrations (YTD)

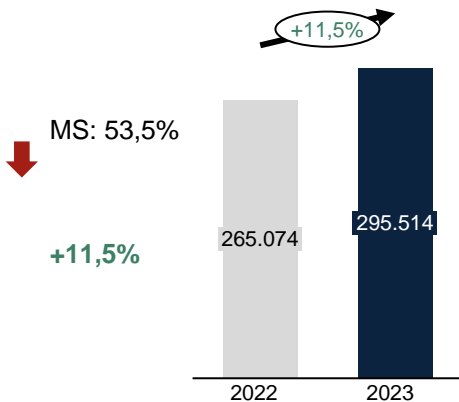
2022
2023

435.681
552.850

26,9%

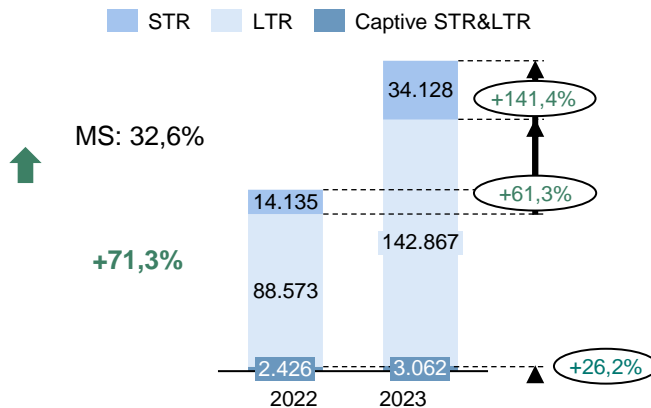


Retail (Private Customers)



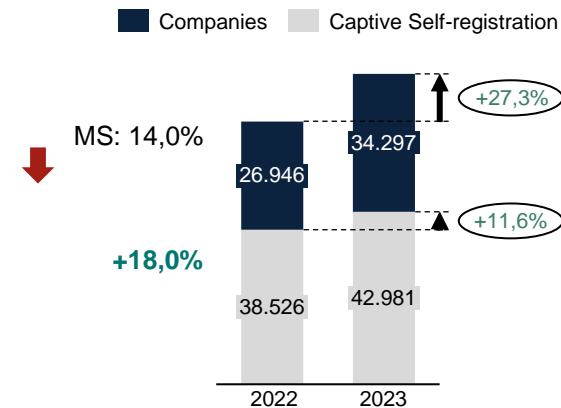
- Compared to **April 2022 YTD**, in **2023** the **Retail** segment registered an increase 11,5% (30.440 additional units sold) but also the largest drop in terms of Market Share -7,3 p.p. (53,5% in April 2023 vs. 60,8% in April 2022), continuing to lose share to the Fleet segment

Fleet (LTR, STR and Captive LTR&STR*)



- Fleet segment** confirmed in April YTD 2023 the impressive result (+71,3%) already recorded in March 2023, led mainly by the **LTR** cluster. Among the three channels, Fleet is the only one that showed an increase in its Market Share (+8,5 p.p.), led by **STR** (+3,0 p.p., 6,2% in April 2023 YTD vs 3,2% in April 2022 YTD) and **LTR** (+5,5 p.p., 25,8% in April 2023 vs 20,3% in April 2022)

Business (Company registrations**)



- The increase of the **Business segment** registrations in **April 2023** is linked both to the increase of **Companies registrations** (+27,3% or 7.351 additional units sold), and **Captive self-registrations** (+11,6% or 4.456 units sold). Market share slightly decreased compared to 2022 (-1,0 p.p.)

Market Share YTD increase / decrease April 2023 / April 2022 (YTD)
 Δ% Volume April 2023 / April 2022 (YTD)



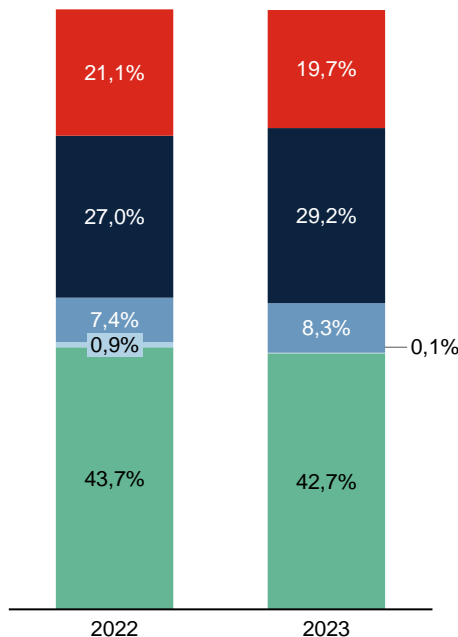
Source: UNRAE

(*) Self-registrations related to LTR&STR use made by Dealers and OEMs; (**) Including Dealers and OEMs self-registrations not related to LTR & STR



“Fuel Type” mix evolution (Market Share)

■ Diesel
 ■ Petrol
 ■ LPG
 ■ CNG
 ■ HEV+PHEV+BEV



	HEV	PHEV	BEV
MS April '22	34,9%	5,6%	3,1%
MS April '23	34,8%	4,8%	3,1%
MS Delta April '23 vs. '22	-0,1 p.p.	-0,8 p.p.	+0,0 p.p.

- Despite a good growth in terms of new registrations (+26,2%), in April 2023 **EV showed a decrease in their Market Share compared to 2022**, reversing the positive result recorded in March 2023 (+2,2 p.p.).
- Diesel and CNG also decreased (-1,4 p.p. and -0,8 p.p. respectively); the other fuel types experienced an increase (Petrol, +2,2 p.p., LPG, +0,9 p.p.)
- **Hybrid Electric Vehicles (HEVs) and Plug-in Hybrid Electric Vehicles (PHEVs)** decreased their Market Share (-0,1 p.p. and -0,8 p.p.).

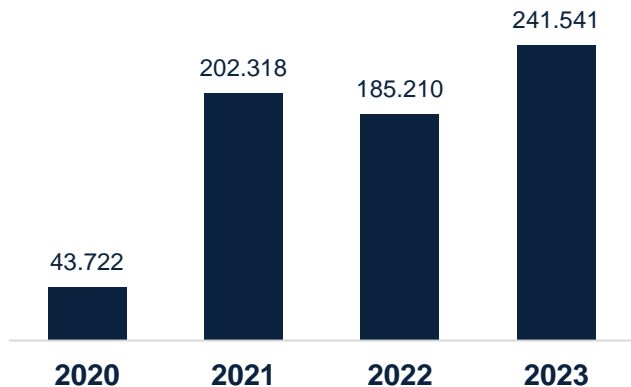
Italy | New car registrations by fuel type



New car registrations of Hybrid vs Pure Electric vehicles

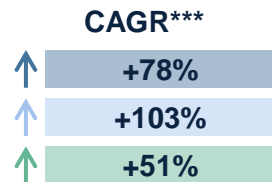
EV Registrations Trend April '23 YTD

Delta YoY	9%	363%	-8%	30%
M.S.	12%	34%	43%	44%

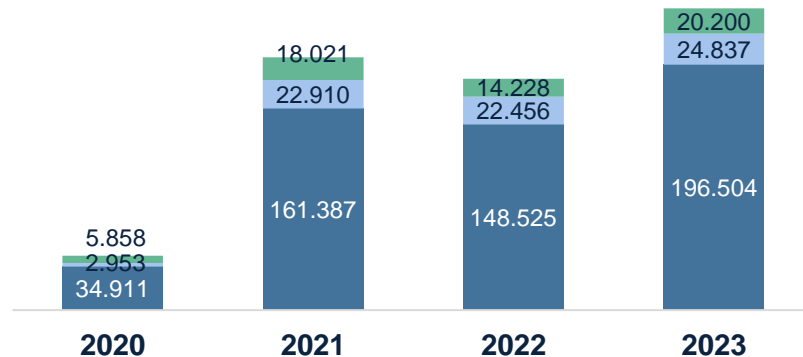


HEV*, PHEV* and BEV** Vehicles Trend April '23 YTD

■ HEV ■ PHEV ■ BEV



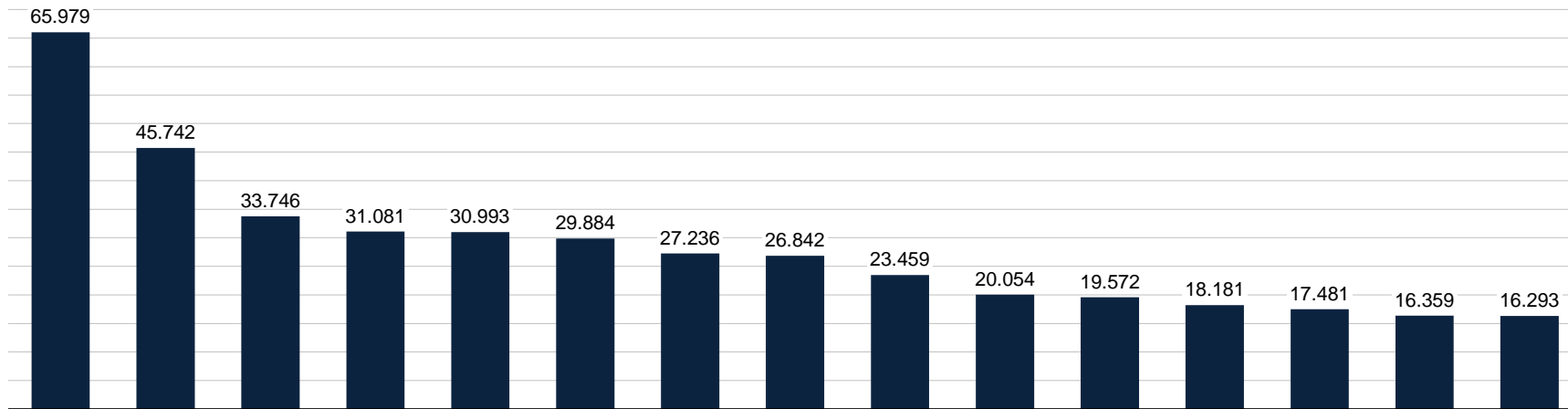
EV MS and registrations grew in 2023 compared to 2022. However, the current level of EV in Italy is far below expectations and significantly behind the shares recorded in the main European countries



Italy | New car registrations by brand



New car registrations by brand – April 2023 YTD (1/3)



	FIAT	VW	Toyota	Ford	DACIA	PEUGEOT	Renault	Jeep	Audi	BMW	Mercedes-Benz	Alfa Romeo	Mercedes-Benz	KIA	Hyundai
Δ Vol. 23/22	+5,91%	+40,69%	+20,32%	+2,43%	+31,61%	+21,80%	+42,98%	+51,05%	+34,82%	+19,93%	+3,20%	+12,89%	+21,14%	+14,24%	+30,58%
M.S. '23	11,93%	8,27%	6,10%	5,62%	5,61%	5,41%	4,93%	4,86%	4,24%	3,63%	3,54%	3,29%	3,16%	2,96%	2,95%
Δ M.S. 23/22	-16,57%	+10,86%	-5,28%	-19,25%	+3,70%	-3,91%	+12,81%	+19,12%	+6,27%	-5,47%	-18,62%	-11,08%	-4,53%	-10,03%	+3,15%

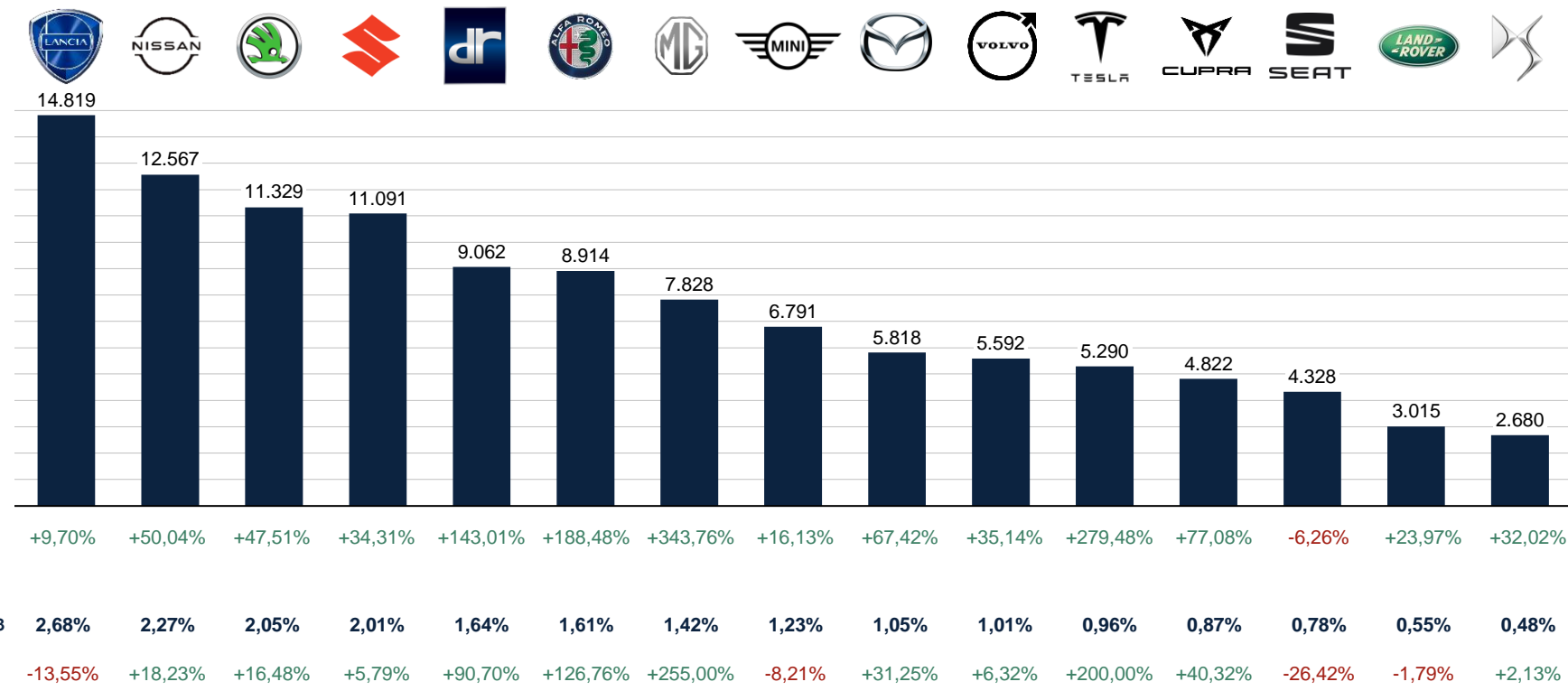


Source: UNRAE

Italy | New car registrations by brand



New car registrations by brand – April 2023 YTD (2/3)

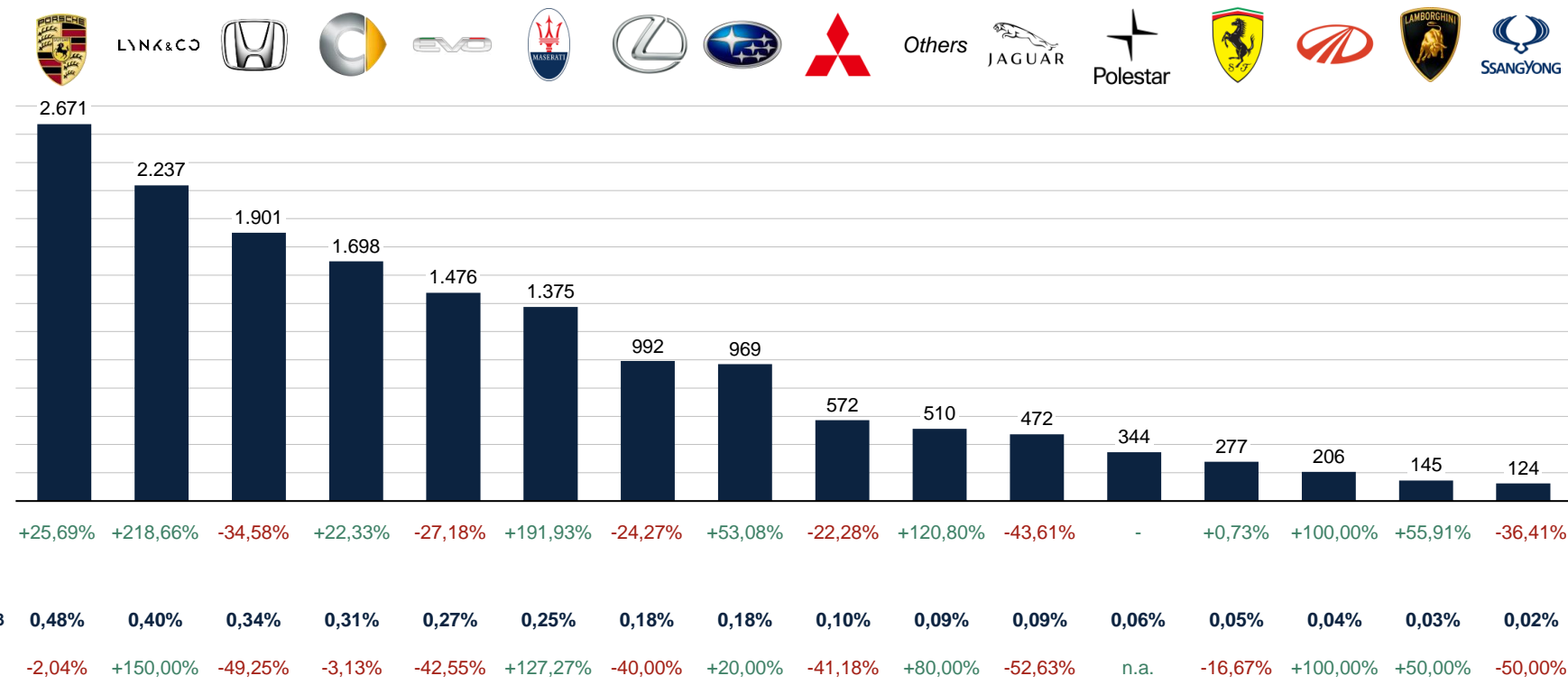


Source: UNRAE

Italy | New car registrations by brand



New car registrations by brand – April 2023 YTD (3/3)



Source: UNRAE

Italy | New car registrations by group



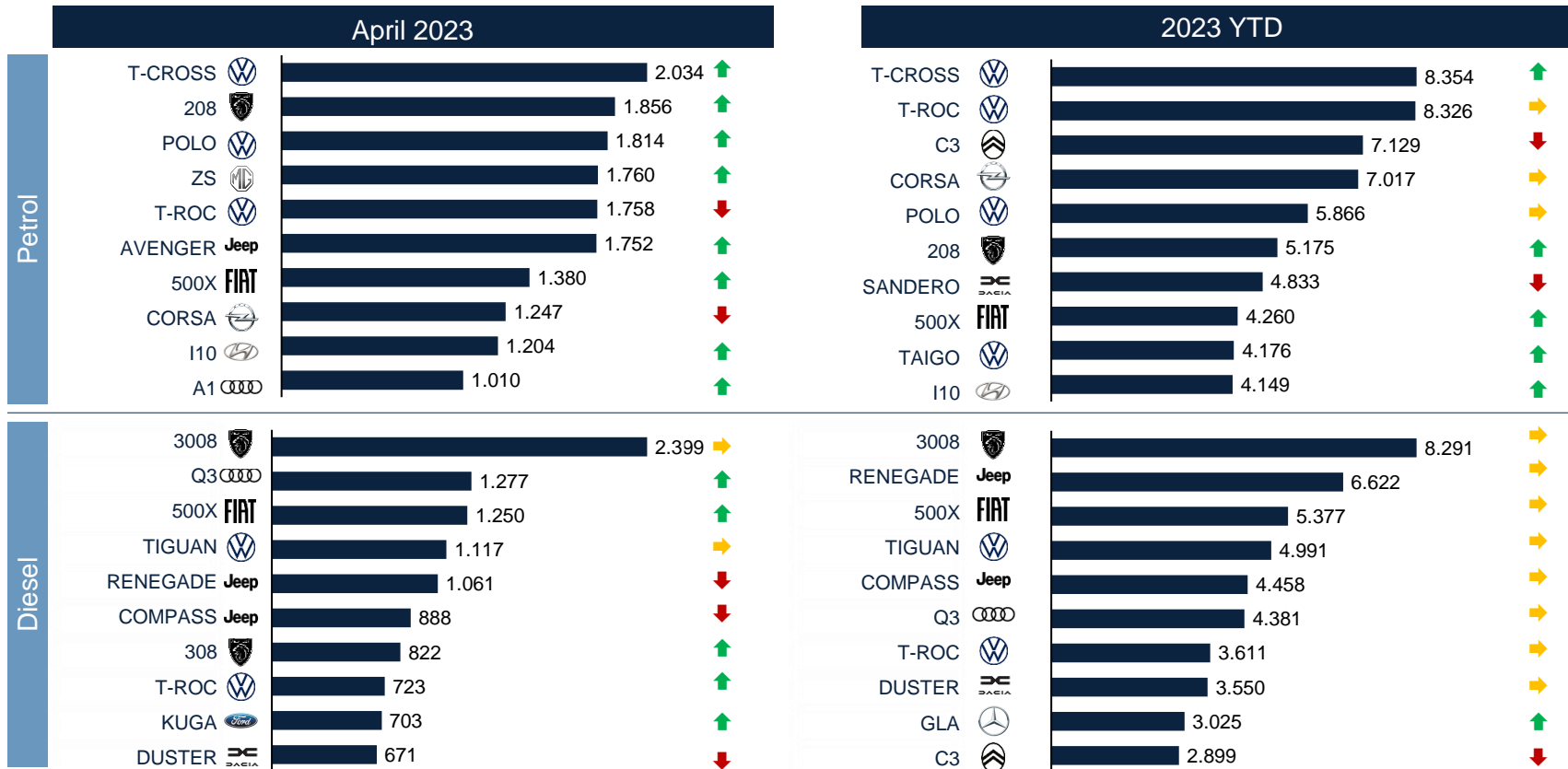
New car registrations by group – Top 15 – April 2023 YTD

	Group	Brand	Volume	Δ% Volume '23 vs '22	Market Share (%)
1	Stellantis		188.246	18,6%	34,1%
2	Volkswagen		89.825	38,1%	16,3%
3	Renault		58.229	36,7%	10,5%
4	Toyota		34.738	18,3%	6,3%
5	Ford		31.081	2,4%	5,6%
<i>Top 5: 72,8%</i>					
6	BMW		26.845	18,9%	4,9%
7	Mercedes-Benz		19.179	21,2%	3,5%
8	Kia		16.359	14,2%	3,0%
9	Hyundai		16.293	30,6%	3,0%
10	Nissan Group		12.567	50,0%	2,3%
<i>Top 10: 89,5%</i>					
11	Suzuki		11.091	34,3%	2,0%
12	DR Group		10.538	83,1%	1,9%
13	MG		7.828	343,8%	1,4%
14	Mazda		5.818	67,4%	1,1%
15	Volvo		5.592	35,1%	1,0%

Italy | New car registrations by fuel type



New car registrations by fuel type – Top 10 – Petrol and Diesel



Source: UNRAE

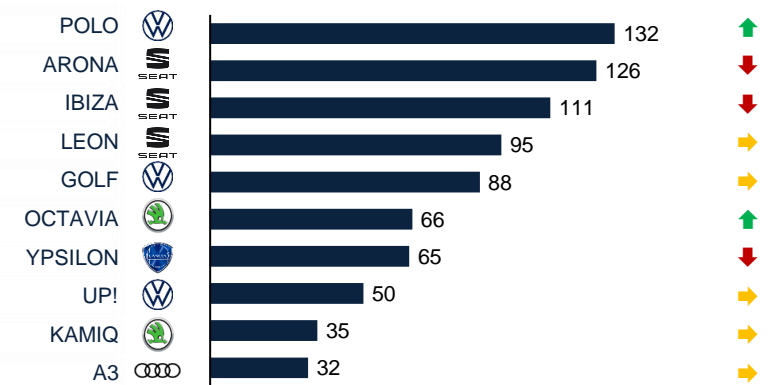
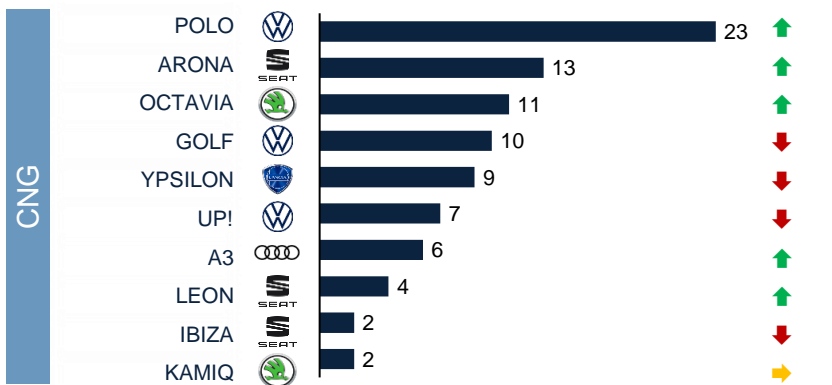
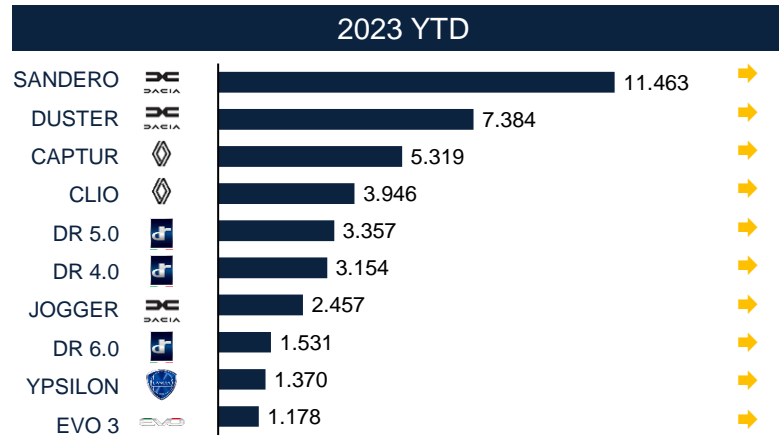
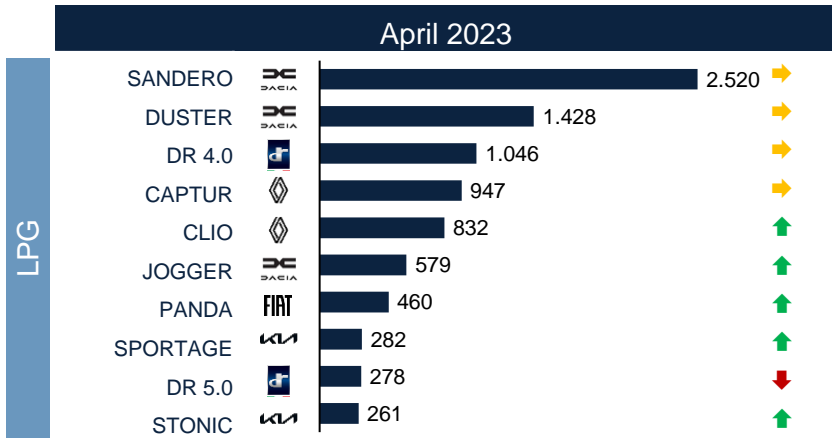


Ranking variation compared to previous period

Italy | New car registrations by fuel type



New car registrations by fuel type – Top 10 – LPG and CNG



Source: UNRAE

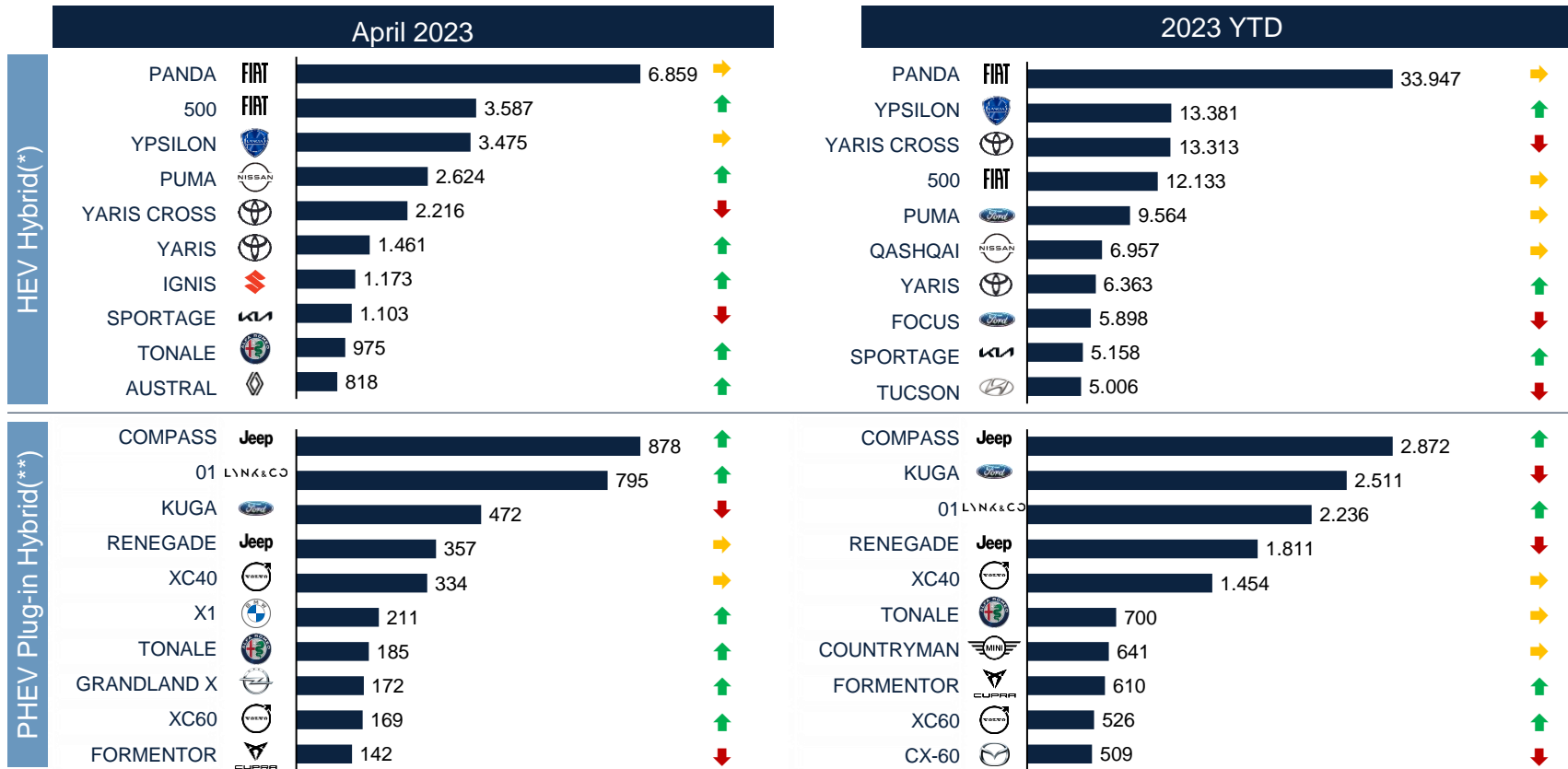


Ranking variation compared to previous period

Italy | New car registrations by fuel type



New car registrations by fuel type – Top 10 – Hybrid (HEV and PHEV)



Source: UNRAE

(*) Hybrid Electric Vehicle (HEV), (**) Plug-in Hybrid Electric Vehicle (PHEV)

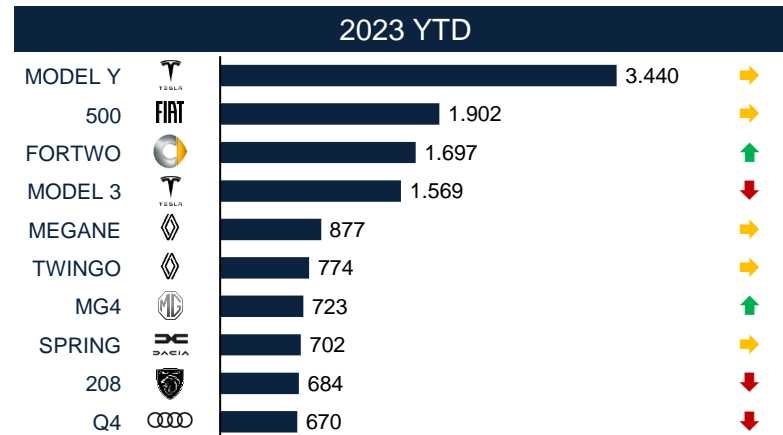
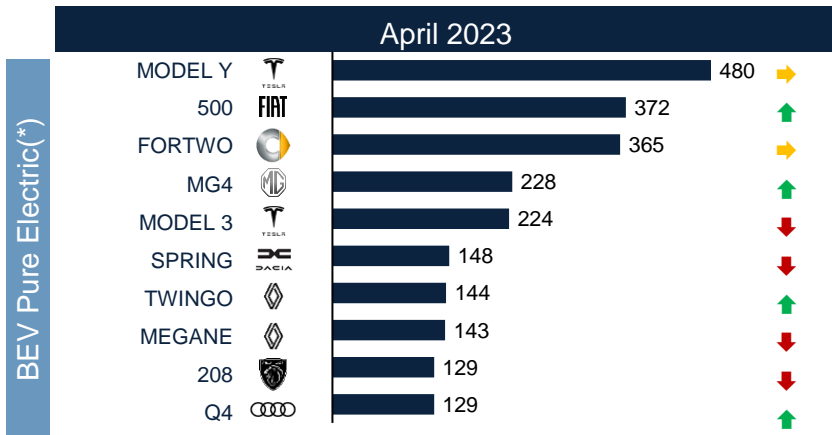


Ranking variation compared to previous period

Italy | New car registrations by fuel type



New car registrations by fuel type – Top 10 – Pure Electric (BEV)



Italy | New car registrations by segment



Overview of new car registrations by segment

Segments Growth in Market Share*

A
«Utility/City»



-1,9 p.p.

B
«Supermini»



-2,5 p.p.

C
«Medium»



3,2 p.p.

D
«Executive»



1,0 p.p.

E/F
«Luxury &
Ultra Luxury»



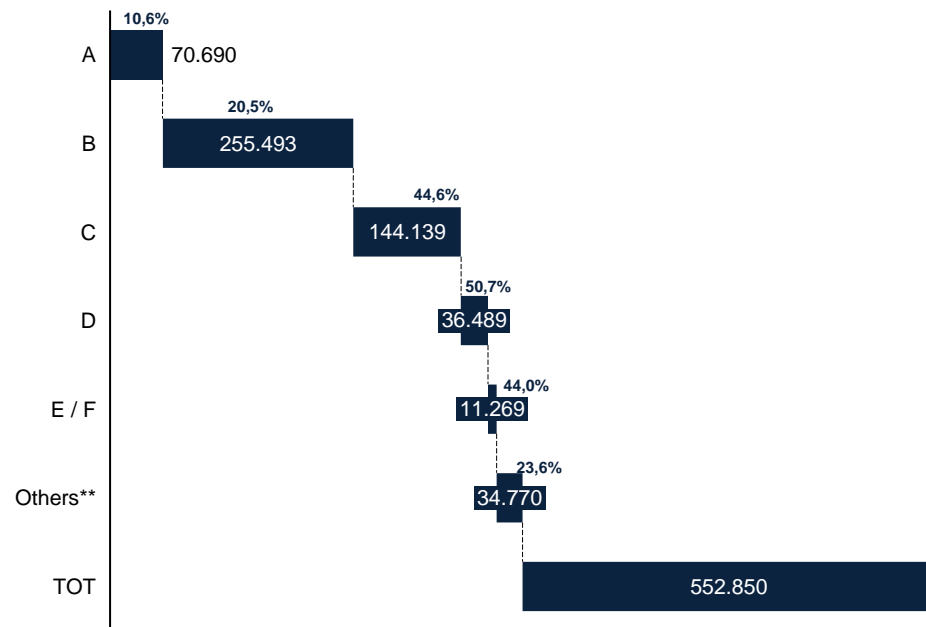
0,3 p.p.

Others
«Station wagon,
MPV, Sportive»



-0,1 p.p.

Market Share and Volume**



Italy | New car registrations by segment

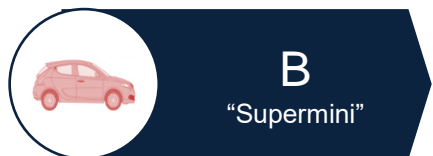
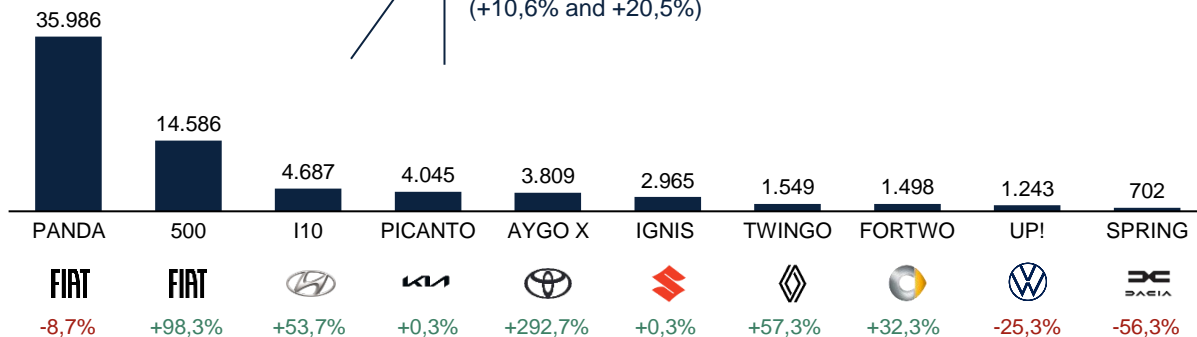


Segment A and Segment B – Top 10 – April '23 YTD

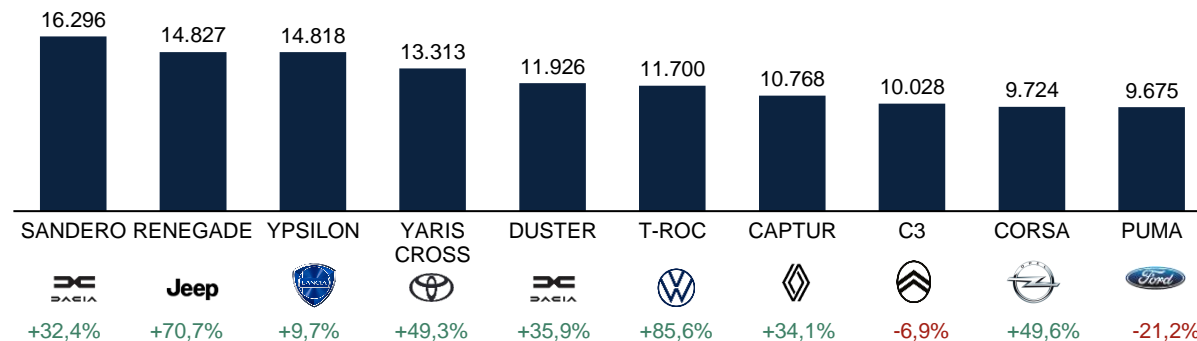
In terms of **MS**, in April 2023 YTD both **Segment A** and **Segment B** registered a decrease (-1,9 p.p. and -2,5 p.p.) vs April 2022. Considering the volumes, in April 2023 both **Segment A** and **Segment B** increased vs. April 2022 (+10,6% and +20,5%)



Δ Vol. %
23/22 YTD



Δ Vol. %
23/22 YTD



Italy | New car registrations by segment

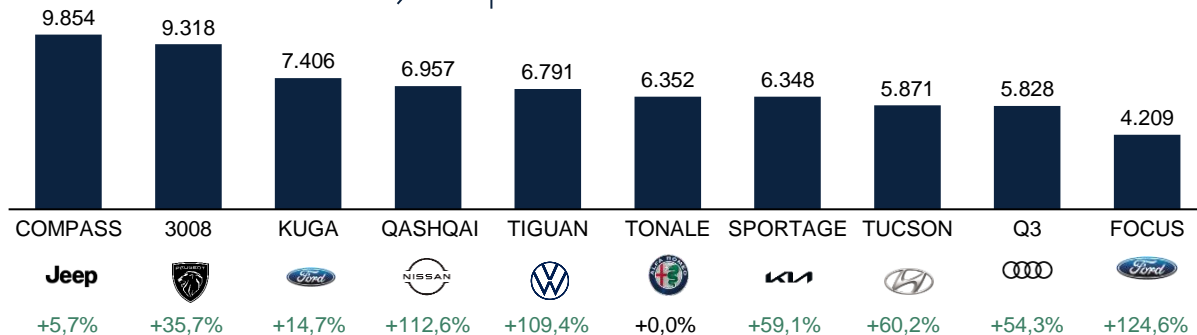
Segment C and Segment D – Top 10 – April '23 YTD



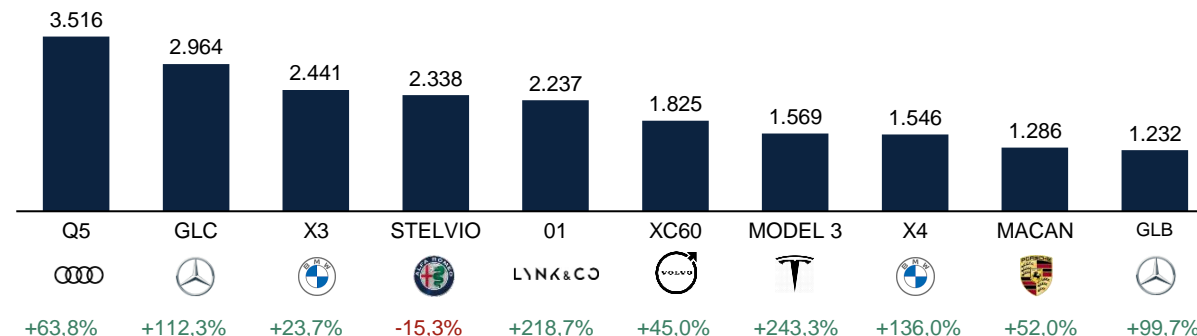
In terms of **MS**, in April 2023 YTD both **Segment C** and **Segment D** registered an increase (+3,2 p.p. and +1,0 p.p.) vs April 2022. Considering the volumes, in April 2023 YTD both **Segment C** and **Segment D** increased vs. April 2022 (+44,6% and +50,7%)



Δ Vol. %
23/22 YTD



Δ Vol. %
23/22 YTD



Italy | New car registrations by segment

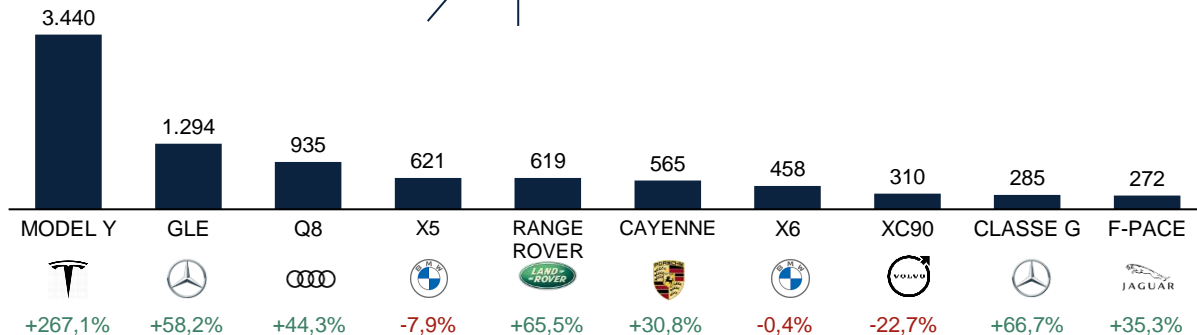


Segment E/F and Others – Top 10* – April '23 YTD

In terms of **MS**, in April 2023 YTD, **Segment E/F** registered an increase (+0,3 p.p.) while **Others** decreased (-0,1 p.p.) vs April 2022. In terms of volumes, in April 2023 YTD both **Segment E/F** and **Others** increased (+44,0% and +23,6%) vs. April 2022

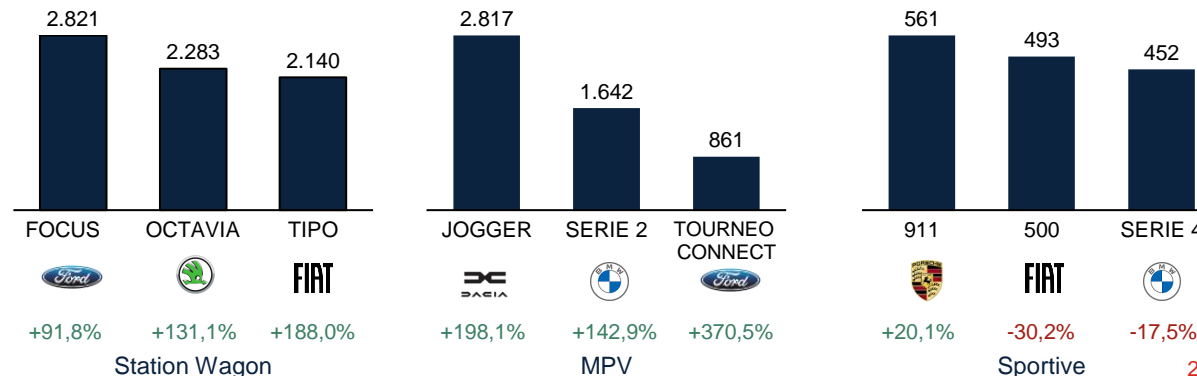
E/F
"Luxury & Extra Luxury"

Δ Vol. %
23/22 YTD



Others
"Station Wagon, MPV, Sportive"

Δ Vol. %
23/22 YTD



Source: UNRAE

(*) For the "Others" Segment, that includes Station Wagon, MPV, Sportive, the top three by type are shown



01. Europe

02. Italy

03. New car models launches in Italy

04. Commercial & Industrial Vehicles

05. News on key industry trends

New Car Models Launches in Italy

New models launch per brand – Roadmap 2023 (1/3)

	A	B	C	D	F	H							
										FIAT			
Jan	Giulia ✓	DBX707 ✓		M3 Touring ✓					Purosangue ✓				
Feb	Stelvio ✓		S4 e S5 black edition ✓		C4 X C5 Aircross ✓								
Mar				XM ✓		Jogger Ecosmart ✓							Ioniq 6 ✓
Apr													Kona ✓
May				M2, X5 →								Civic Type R 	
Jun				Serie 7 									
Jul				M3CS 						B-Suv 		CR-V 	Santa Fe
Aug	Brennero 			X2, iX2 							Kuga 		
Sep	33 Concept 												
Oct				Serie 5 							E-Transit Custom 	ZR-V 	Ioniq 7
Nov											Mustang 		
Dec			A3 Allstreet Q6 e-tron →							595 e →			

New Car Models Launches in Italy

New models launch per brand – Roadmap 2023 (2/3)

	I	J	K	L	M	N						
Jan												
Feb									EQS Suv 			
Mar									EQE Suv 			
Apr			Avenger e 									
May		F-Type 75 					Gran Turismo/ Folgore 		AMG C 63 		ASX 	
Jun						Gran Cabrio/ Folgore 			GLC Hybrid 			
Jul				EV9 	Urus Evo 			CX-80 	GLE e GLE Coupè 		Colt 	
Aug					Aventador 		Grecale/ Folgore 		Classe G 			
Sep									AMG GLC GLC Coupè 			
Oct									GLA 			
Nov									Maybach EQS Suv 			
Dec			Recon 							Countryman 		

New Car Models Launches in Italy

New models launch per brand – Roadmap 2023 (3/3)

	O	P	R	S	S	T	V
Jan						Forester ✓	EX90 ✓
Feb		408 ✓	Austral ✓				Corolla ✓
Mar							
Apr	Corsa ✓		Cayenne ✓				
May							
Jun	Astra GSe Astra-E →	e-308					
Jul		e-308 sw		Elroq	#1		ID.3 GTX →
Aug			Macan EV	Gran Austral	Korando E Motion →		BZ4x → Touareg →
Sep			911 Safari		X200		Tiguan XC 20 →
Oct		3008 Mild Hybrid		Scenic E-Tech	Torres	Swift	
Nov		5008 Mild Hybrid					ID.Aero
Dec			5 E-tech Electric			Cybertruck	CH-R → Golf



01. Europe

02. Italy

03. New car models launches in Italy

04. Commercial & Industrial Vehicles

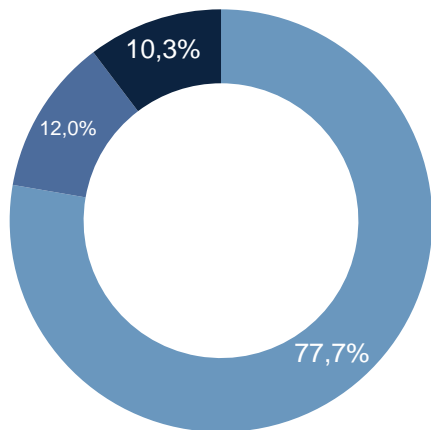
05. News on key industry trends



Commercial and Industrial Vehicles Highlights 2023

In **April 2023**, the **commercial and industrial vehicles Market** showed a **general growth** with a total of **17.197** new vehicles registered in the month (78.132 YTD). Commercial vehicles ($\leq 3,5t$) registered a drop (-4,5%) in April 2023 compared to April 2022, while industrial vehicles recorded an increase both in the **light mass segment $<16t$** (+2,7%) and in the **heavy mass segment $\geq 16t$** (+4,5%).

Vehicles YTD distribution by category



■ $\leq 3,5t$ ■ 3,5 t - 16t ■ $\geq 16t$

78.132

Total registered vehicles

+ 5,5%

compared to 2022 registrations

(74.069)

Commercial vehicles YTD

60.716 + 4,2% *

Light mass vehicles YTD

9.349 + 8,8% *

Heavy mass vehicles YTD

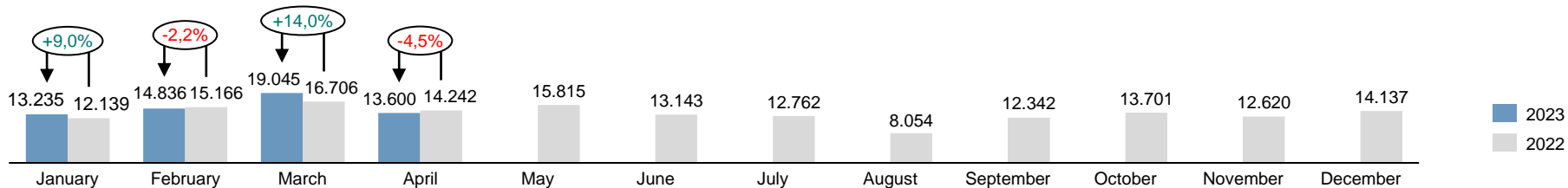
8.067 + 11,6% *

Italy | New Vehicles registrations

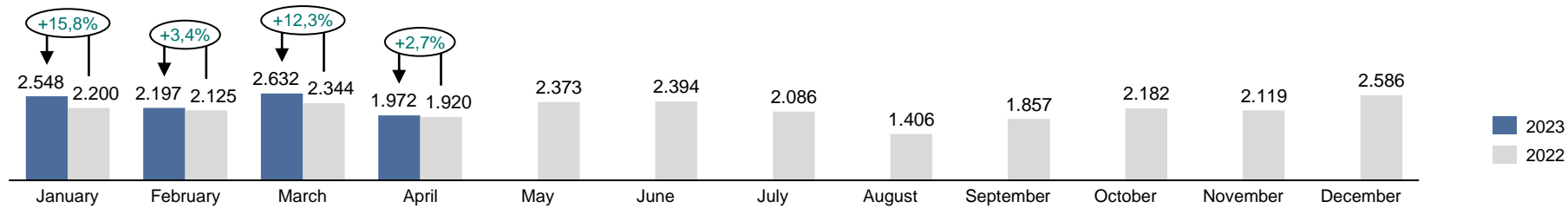


Italian Market - Commercial and Industrial vehicles Registration 2023 vs 2022 (2/2)

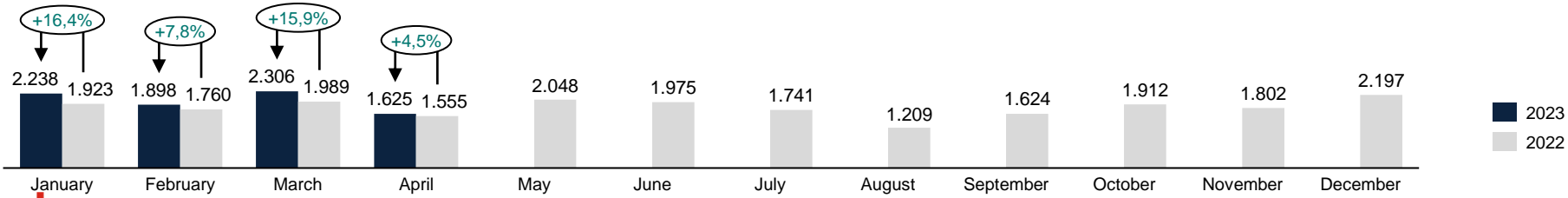
Commercial Vehicles ≤ 3,5t April 2023YTD



Industrial Vehicles | Light mass segment 3,5t – 16t April 2023YTD



Industrial Vehicles | Heavy mass segment ≥ 16t April 2023YTD



Italy | New Vehicles registrations



Italian Market - Commercial vehicles March '23 YTD

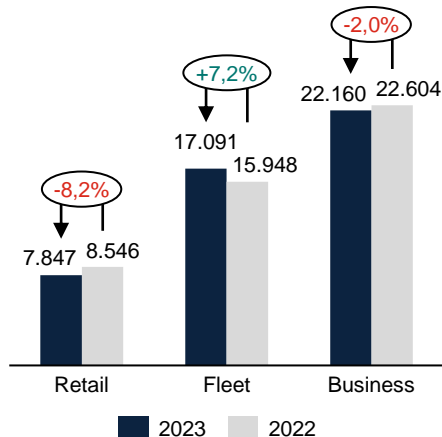
Commercial Vehicles January - March Analysis

In the first 3 months of **2023**, the **commercial vehicles** increased in new registrations (+7,0%), with a total of **47.098**, mainly driven by the **Fleet segment**, while **Retail** and **Business** recorded a **decrease**.

Regarding the fuel type, significative increase for **LPG** (+35,6%) and **Diesel** (+12,2%), while **Petrol**, **CNG** and **EV** continue to **decrease**.

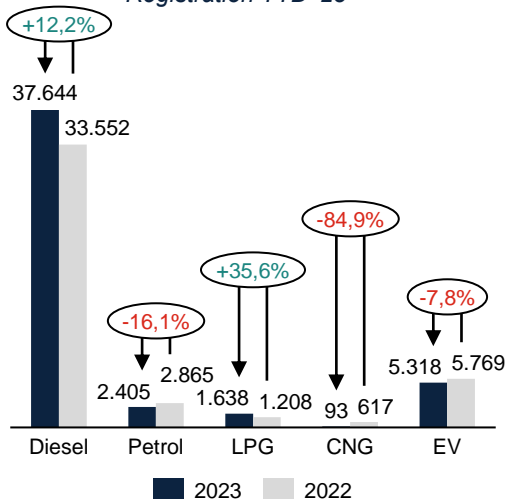
Analysis by "Customer Segment"

Registration YTD '23/'22

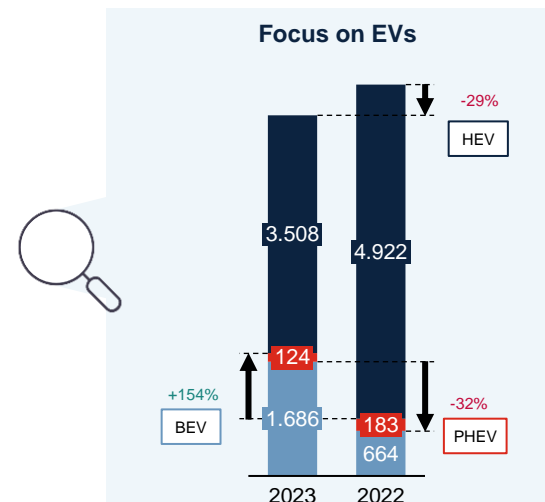


Analysis by "Fuel Type"

Registration YTD '23



Focus on EVs

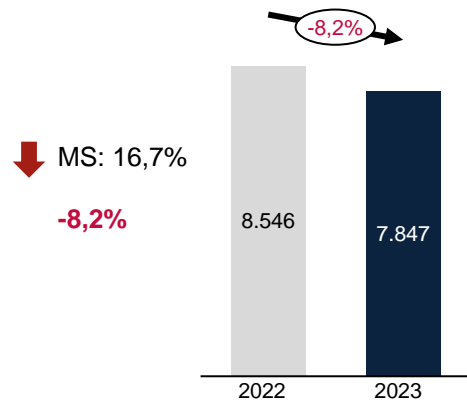


Italy | New Vehicles registrations



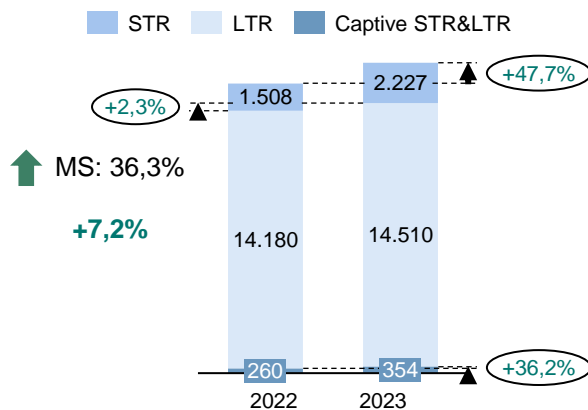
Italian Market - Commercial vehicles March 2023 YTD vs March 2022 YTD

Retail (Private Customers)



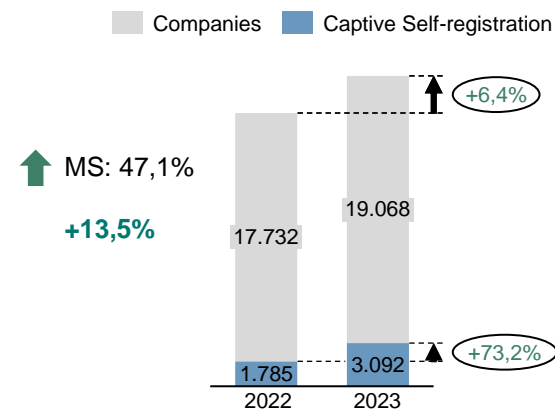
- Compared to **1Q 2022 YTD**, in the first 3 months of **2023**, the **Retail** segment registered a **decrease** both in terms of **registrations (-8,2%)** and **Market Share (-2,7 p.p.: 16,7% in 1Q 2023 vs. 19,4% in 1Q 2022)**

Fleet (LTR, STR and Captive LTR&STR*)



- Captive STR<R (+36,2%), STR (+47,7%) and LTR (+2,3%)** registered an increase in **1Q 2023 over the same period in 2022**. The **Market Share** of **Captive STR<R (0,8% in 1Q 2023 vs 0,6% in 1Q 2022)** and **STR (4,7% in 1Q 2023 vs 3,4% in 1Q 2022) increased**, while the **LTR Market Share decreased (30,8% in 1Q 2023 vs 32,2% in 1Q 2022)**

Business (Company registrations**)



- The increase of the **Business segment** registrations in **1Q 2023** is mainly related to the increase of **Captive self-registrations (+73,2% or 1.307 units sold)**, and to a minor extent to **Companies registrations (+7,5% or 1.336 additional units sold)**



01. Europe

02. Italy

03. New car models launches in Italy

04. Commercial & Industrial Vehicles

05. News on key industry trends

News on key industry trends

5 key trends are expected to push the evolution of the automotive industry. For each one in the following slides there is a selection of main news published from 24/04/2023 to 23/05/2023



Sustainability

Increasing OEMs focus on the reduction or neutralization of environmental externalities along the automotive value chain



Digitalization

Towards a seamless online-offline customer journey with an increasing direct role of the OEM



Mobility Services

New emerging models (MaaS) of car usership to meet new customer mobility needs and behaviors are transforming OEMs' strategies



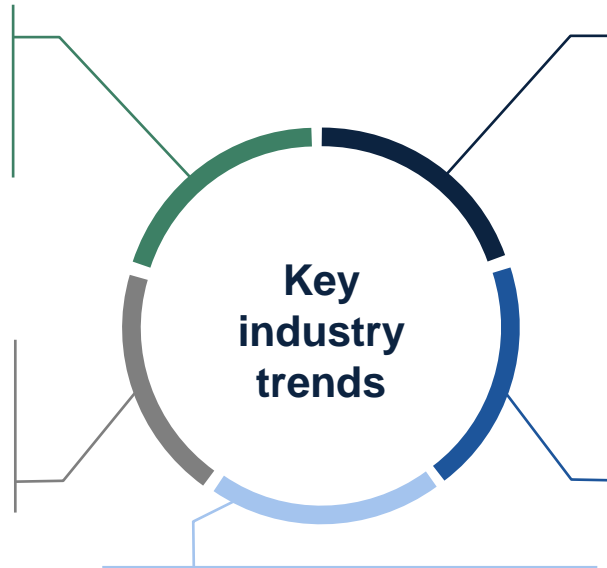
Electrification

Car parc evolution towards electric (full and hybrid) vehicles and creation of a new ecosystem based on EV needs



Connectivity

Connected cars are changing the way to interact with customers and opening new business streams related to data utilization



News on key industry trends

Digitalization



Redrive is born: the new Koelliker brand revolutionizing the world of used cars

Koelliker Group launches Redrive, the physical and digital marketplace for 360-degree integrated used car management that empowers dealers and private customers to easily sell and purchase used (...)

<https://www-autoappassionati-it.cdn.ampproject.org/c/s/www.autoappassionati.it/nasce-redrive-il-nuovo-brand-koelliker-che-rivoluziona-il-mondo-dellusato/amp/>

BMW launches Digital Key Plus for Android

BMW customers with compatible Samsung or Google devices will be able to use them to lock or unlock their BMW and start the engine. The suitable hardware has been projected to use older devices too. (...)

<https://telematicsnews.info/2023/04/24/bmw-updates-on-digital-key-plus/>



News on key industry trends

Electrification (1/3)



BMW Group & E.ON launch Connected Home Charging ecosystem

"The BMW Group & E.ON have launched Connected Home Charging – a pan-European ecosystem based around intelligent home EV charging. Through the partnership, both companies are looking to develop an ecosystem that will allow customers to connect (...)

<https://telematicsnews.info/2023/05/02/bmw-group-and-e-on-create-connected-home-charging-ecosystem-for-intelligent-charging-at-home/>

Shell and Volkswagen push ahead the expansion of charging infrastructure: Opening of the first innovative Flexpole charging station

Shell Germany and the Volkswagen Group are jointly driving forward the expansion of the charging infrastructure for electric mobility. The first innovative 150 kW Elli Flexpole charging station was put in operation at a Shell service station in Göttingen (...)

<https://www.automotiveworld.com/news-releases/shell-and-volkswagen-push-ahead-the-expansion-of-charging-infrastructure-opening-of-the-first-innovative-flexpole-charging-station/>

Be Charge: European Commission and CDP fund 100 million for Hpc infrastructure in EU

The European Commission and Cassa Depositi e Prestiti have funded Plenitude Be Charge with more than 100 million euros to build one of Europe's largest high-speed charging infrastructures by 2025 (...)

<https://e-ricarica.it/be-charge-commissione-europea-e-cdp-finanziano-100-milioni-per-infrastrutture-hpc-in-ue/>

News on key industry trends

Electrification (2/3)



Hyundai Motor Group & SK On to establish \$5 billion EV battery cell production JV in the U.S.

Hyundai Motor Group has announced that it plans to set up a US-focused EV battery cell production joint venture with its partner, SK On. The Group affiliates Hyundai Motor Company, Kia Corporation, and each approved the plan (...)

<https://telematicsnews.info/2023/04/26/hyundai-motor-group-sk-on-to-establish-5-billion-ev-battery-cell-production-jv-in-the-u-s/>

In tomorrow's Europe, charging stations every 60 km

By 2026, charging stations for electric cars will have to be installed every 60 km along major European arteries. Every 120 km for charging trucks. It will be up to individual European countries to present plans to achieve the targets set by the Union. (...)

<https://emob-italia.it/2023/05/13/nelleuropa-di-domani-colonnine-ogni-60-km/>

GM Envolve launches as a one-stop shop to help fleets go electric

General Motors launched its newest business unit, GM Envolve. The goal is to utilize all aspects of GM to create a new, all-in-one user experience enabling commercial and fleet customers to transition to electric seamlessly (...)

<https://statics.teams.cdn.office.net/evergreen-assets/safelinks/1/atp-safelinks.html>

News on key industry trends

Electrification (3/3)



Koelliker Powered by Askoll, the Italian Electric Scooter

The Koelliker Group, a leading Italian provider of sustainable and intelligent mobility solutions, exclusively presents the first Koelliker branded electric scooter powered by Askoll, an Italian company with over 45 years of experience (...)

<https://www.quotidianomotori.com/moto/koelliker-powered-by-askoll-scooter-elettrico/>



News on key industry trends

Connectivity



Google shares in-vehicle technology updates at 2023 I/O event

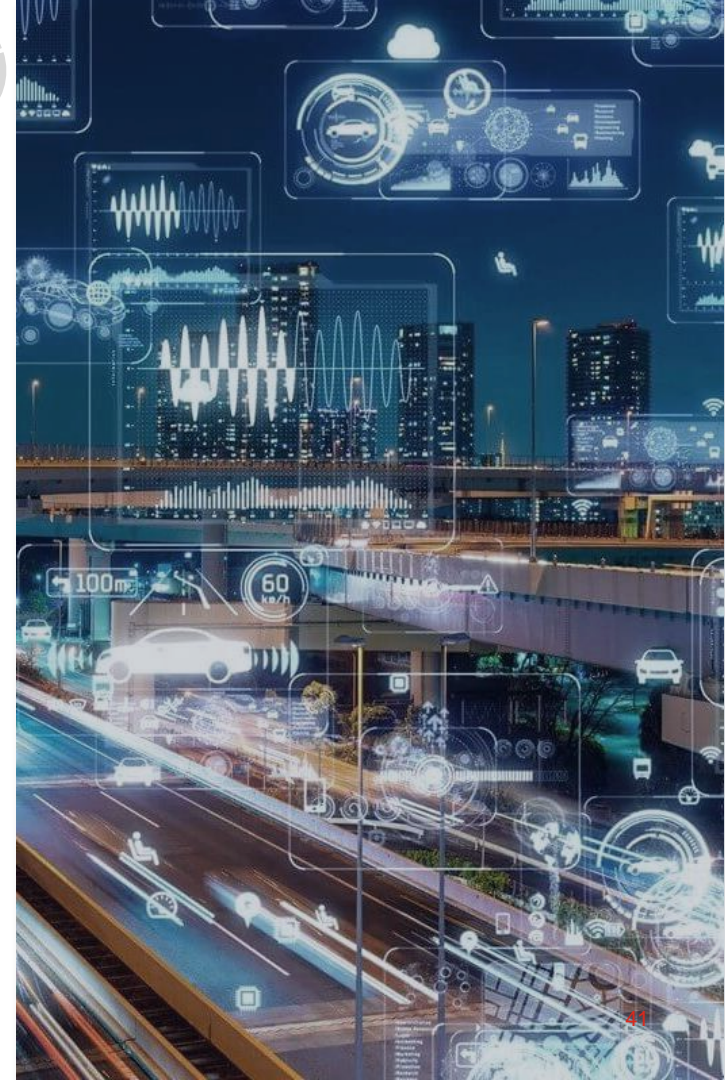
Google detailed a series of new updates that will soon be rolling out to Android Auto, its smartphone mirroring system, and Google built-in, its proprietary infotainment system (...)

<https://telematicsnews.info/2023/05/11/google-shares-in-vehicle-technology-updates-at-2023-i-o-event/>

Porsche, VW Commercial Vehicles partner with Mobileye on automated driving software

Porsche will use Mobileye's "Supervision" system to allow drivers to autonomously follow navigation routes chosen by the driver, change lanes and overtake other vehicles (...)

<https://europe.autonews.com/automakers/porsche-vw-partner-mobileye-automated-driving-software>



News on key industry trends

Mobility Services



Dott e-scooters launch in Madrid with low fares for everyday use

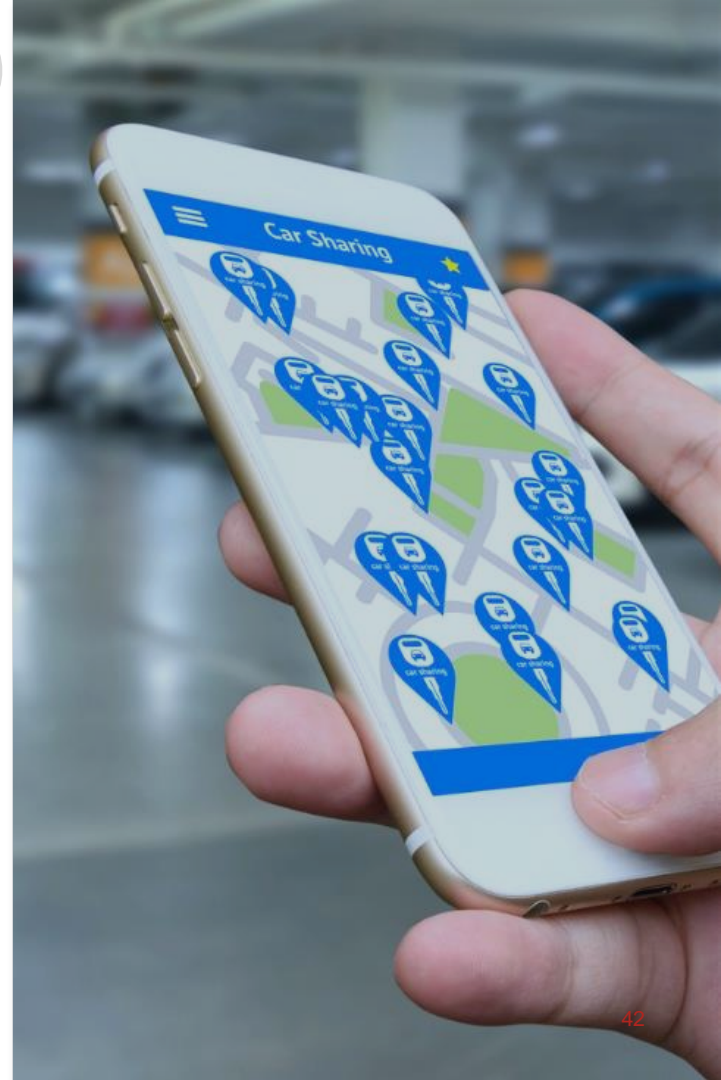
Dott, the responsible micro mobility operator, today launches a fleet of 2.000 shared e-scooters in Madrid. Dott's service has been integrated with the Madrid 360 app. The collaboration is combining public transport services with shared micro mobility (...)

<https://www.automotiveworld.com/news-releases/dott-e-scooters-launch-in-madrid-with-low-fares-for-everyday-use/>

Scooter sharing company Acciona leaves Italy

Goodbye red scooters in Milan and Rome. Acciona closes its Italian market on 30 April and fires its 39 employees. Too many potholes, but above all, too many damages and thefts as in no other country. The necessary insurance costs did not make the (...)

<https://www.open.online/2023/04/27/acciona-scooter-sharing/>



News on key industry trends

Sustainability



Mercedes-Benz AG to integrate aluminum with almost 70 per cent CO₂ reduction into series production

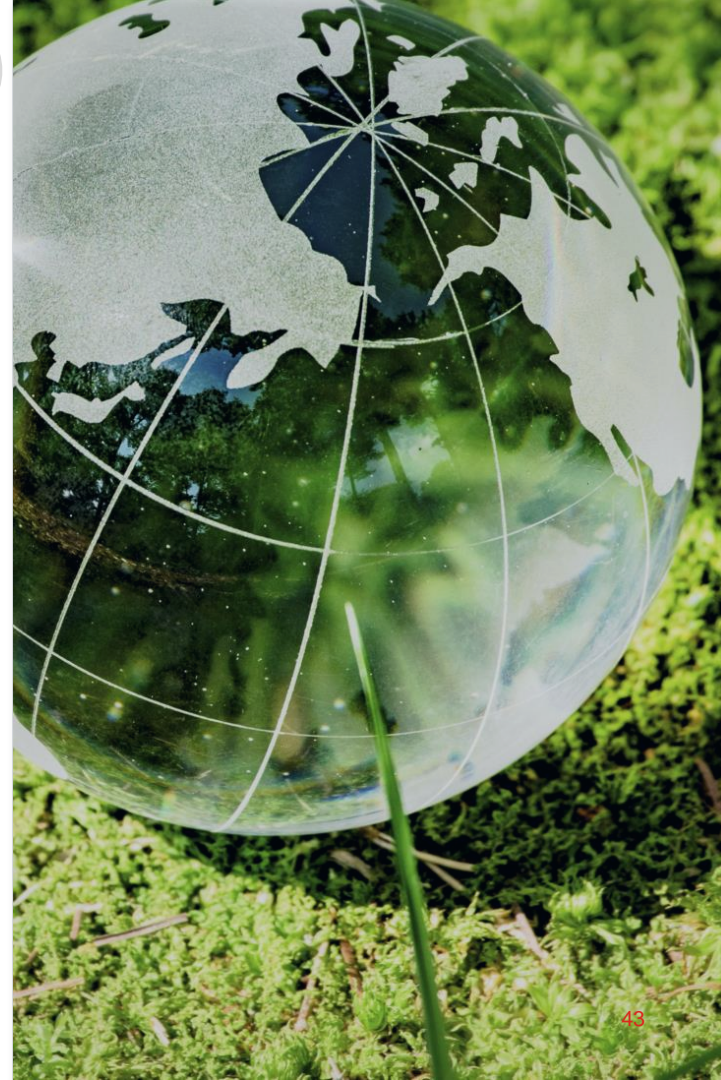
After announcing the technology partnership with aluminum producer Hydro in December 2022, Mercedes-Benz presents first results of its low-carbon-technology roadmap (...)

<https://www.automotiveworld.com/news-releases/mercedes-benz-ag-to-integrate-aluminium-with-almost-70-per-cent-co2-reduction-into-series-production/>

Paccar and Toyota expand hydrogen fuel cell truck collaboration to include commercialization

Paccar and Toyota Motor North America, Inc. announced an expansion of their joint efforts to develop and produce zero emissions, hydrogen fuel cell Kenworth and Peterbilt trucks powered by Toyota's next-generation hydrogen fuel (...)

<https://www.automotiveworld.com/news-releases/paccar-and-toyota-expand-hydrogen-fuel-cell-truck-collaboration-to-include-commercialization/>



Thank you.

Andrea Ingallinera

Partner

andrea.ingallinera@bip-group.com

cell. +39 335 684 2775

Gerardo Ferracane

Partner

gerardo.ferracane@bip-group.com

cell. +39 334 664 4504

Business Integration Partners S.p.A.

Piazza San Babila 5

20122 Milano

www.bipconsulting.com

HERE TO DARE

Fabrizio Arena

Partner

fabrizio.arena@bip-group.com

cell. +39 335 123 2387

Massimiliano Tortorella

Principal

massimiliano.tortorella@bip-group.com

cell. +39 334 620 9636

