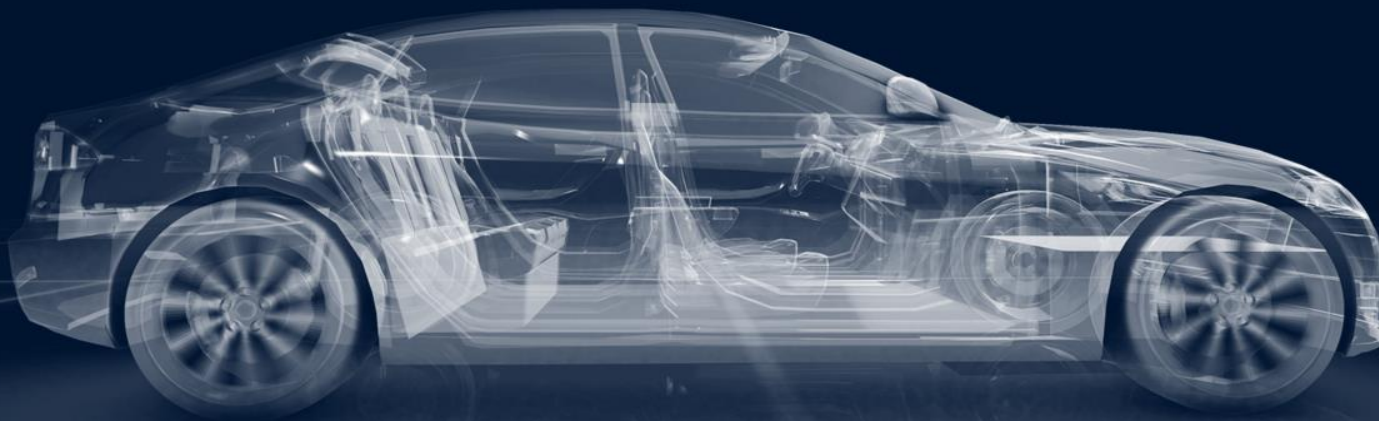


BIP AutoObserver

Analysis of new car registrations

May 2023



Executive Summary

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



Europe*

+18,2%

Top Countries by growth of new registrations: 29 countries grew in May 2023 compared to May 2022, the highest rates for Croatia (+74,5%), Portugal (+54,6%) and Belgium (+42,5%). Only 2 Countries decreased, Malta with -18,4% and Hungary -11,2%.

Top 3 Countries by market share: Germany 21,0% (-1,4 p.p.), UK 14,5% (-0,1 p.p.) and Italy 13,2% (+0,9 p.p.) in May 2023 YTD compared to May 2022 YTD.

Brands: among the **Top 15 by volume**, the highest growth comparing May 2023 to May 2022 for Dacia (+44,4%), Skoda (+36,1%) and Audi (+29,5%), no brand registered a decline this month.

Premium brands:** all 3 Premium brands increased both in the month of May 2023 and YTD, Audi (+29,5% monthly and +22,5% YTD), BMW (+28,3% monthly and +9,2% YTD) and Mercedes (+1,3% monthly and +8,4%YTD).



Italy

+ 23,1%

Areas monthly results: North-East +29,4%, North-West +18,6%, Center +32,7%, South +5,0% and Islands +7,7%, comparing May 2023 to May 2022

Customer segments: Retail +11,4%, Fleet +62,6% and Business +23,4% May 2023 YTD vs May 2022 YTD

Brands: considering YTD results, among the **Top 15 by volume** only Fiat and Citroen decreased (-1,4% and -2,4%); all the other brands registered an increase, the highest for Renault (+46,5%).

Premium brands:** Audi, Mercedes-Benz and BMW registered an increase in May 2023 compared to May 2022 both monthly and YTD. Respectively (+43,6% and +36,6%), (+15,5% and +20,0%), (+28,1% and 21,5%).



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* – May 2023

European Markets*
new car registrations

2022

948.815

2023

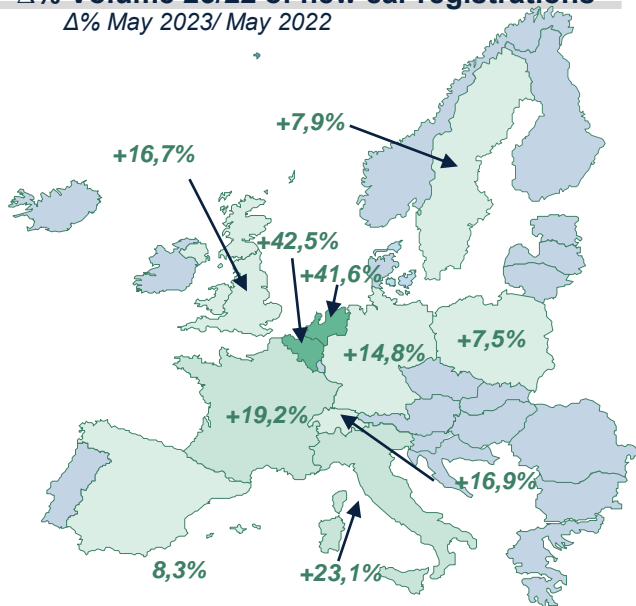
1.121.644

+18,2%



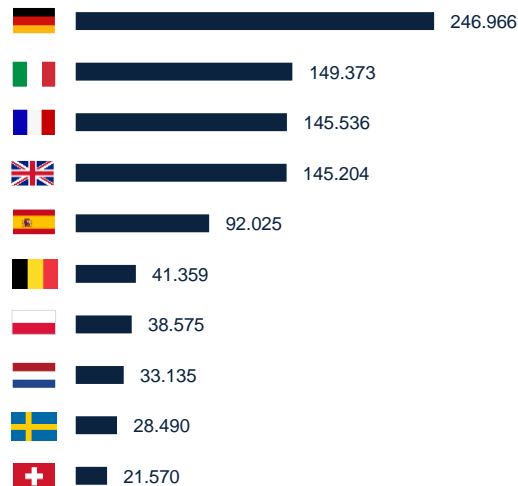
Δ% Volume 23/22 of new car registrations

Δ% May 2023/ May 2022



Number of EU new car registrations 2023

New car registration May 2023



Highlights

- The European market (EU+UK+EFTA) **registrations** increased from 948.815 in May 2022 to 1.121.644 cars in May 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 (+42,5%)
 - Netherlands (+41,6%)
 - Italy (+23,1%)

Europe | Market Overview

Top 10 European Markets* – May 2023 YTD

European Markets*
new car registrations

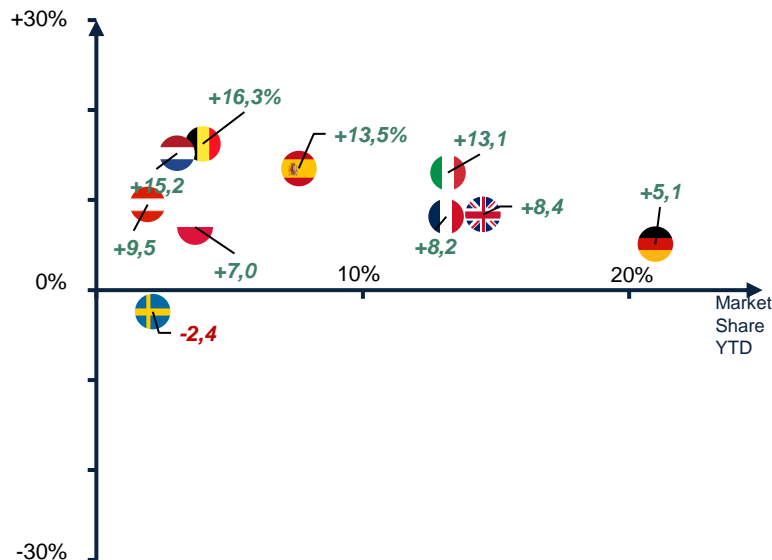
2022	4.534.805
2023	5.323.630

+17,4%



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

Δ % Volume May 23/22



#	Country	MS May 2023 YTD	Δ VS 2022	Sales Volume May 2023 YTD
1	GER	21,0%	+5,1%	1.116.731
2	UK	14,5%	+8,4%	772.454
3	ITA	13,2%	+13,1%	702.263
4	FRA	13,1%	+8,2%	698.929
5	SPA	7,6%	+13,5%	404.337
6	BEL	4,0%	+16,3%	212.715
7	POL	3,7%	+7,0%	197.091
8	NET	3,0%	+15,2%	161.229
9	SWE	2,1%	-2,4%	112.380
10	AT	1,9%	+9,5%	102.179



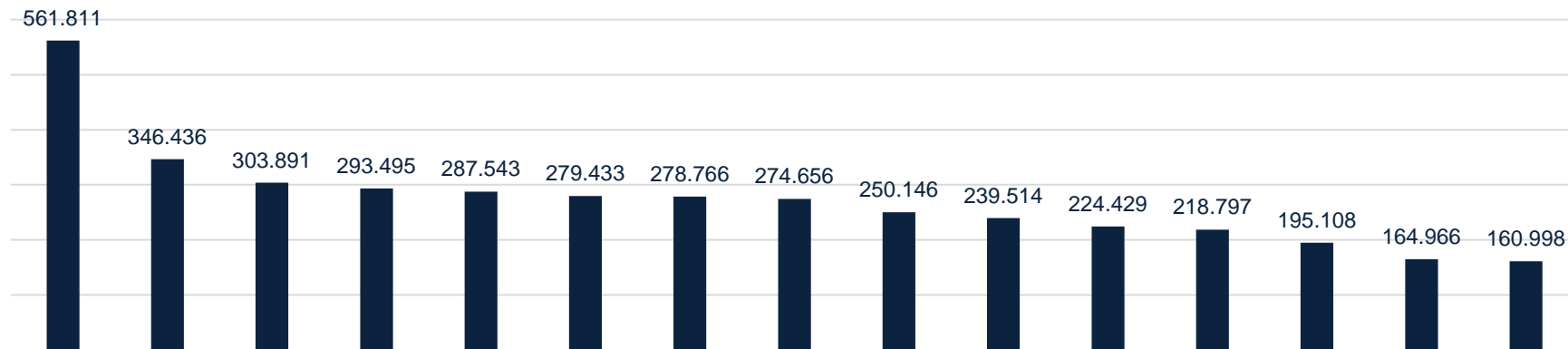
Highlights

- Considering YTD results, **27 countries out of 31 increased in May 2023** compared to May 2022 YTD, with most significant results for **Croatia** (+23,5%), **Portugal** (+23,2%) and **Belgium** (+16,3%). Only 4 countries decreased and just Sweden in the top 10 for registration (-2,4%)

Europe | New car registrations by brand



Top 15 – May 2023 YTD



Δ Vol. 23/22	+23,4%	+11,6%	+22,5%	+11,0%	+9,2%	+8,4%	+32,4%	+22,0%	+3,5%	+42,9%	+2,1%	+2,5%	+7,3%	-2,5%	+0,7%
MS '22	10,6%	6,5%	5,7%	5,5%	5,4%	5,2%	5,2%	5,2%	4,7%	4,5%	4,2%	4,1%	3,7%	3,1%	3,0%
Δ MS 23/22	+6,00%	-4,41%	+3,64%	-5,17%	-6,90%	-8,77%	+13,04%	+4,00%	-11,32%	+21,62%	-12,50%	-12,77%	-7,50%	-16,22%	-14,29%



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

May 2023 Highlights

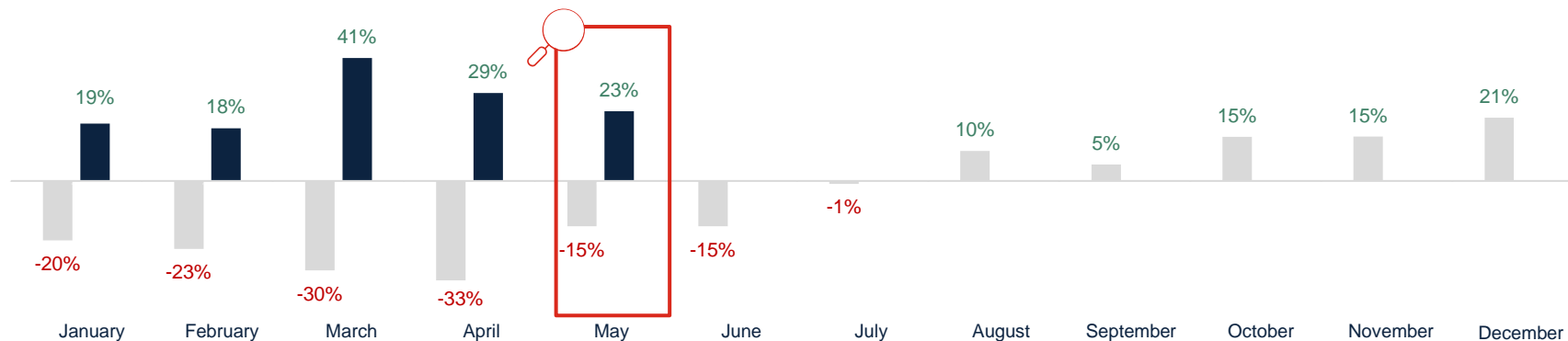
The month of May 2023 confirmed the recovery with respect to 2022, with 149.411 new registrations, **+23,1%** compared to May 2022; an increase that consolidates the growth of the first 5 months of 2023, with **+26,1%** towards May 2022 YTD. These results are mainly due to the improvement in the supply capacity of car manufacturers linked to the easing of the difficulties in sourcing essential components.

In May 2023 **BEVs Market Share** (4,1%) slightly **increased** (+0,5 p.p.), while **PHEVs** (4,7%) **decreased** (-1,4 p.p.); **HEVs** rose by **+1,2 p.p.**, with a Market Share of 34,7%, ahead of Petrol (28,6%) and Diesel (19,5%).

All **geographical areas increased**, with North-East and Center confirming the highest growth (+29,4% and +32,7% respectively). Double digit increase for **all sales channels** (Retail, +11,4%, Fleet, +62,6%, Business, +23,4%), with the most impressive result for the Fleet Segment, whose growth is still mainly driven by LTR.

Renault, Jeep and Dacia showed the higher increase on a YTD perspective, while Citroen and Fiat are the only ones decreasing among the top 15 by volume.

Remarkable growth also for **MG** and **Tesla** (+432,89% and +380,61% respectively).



■ 2021/2022 ■ 2022/2023

Italy | Market Overview

Italian Market – May 2023 vs May 2022

Italy New Car Registrations

2023
2022

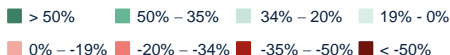
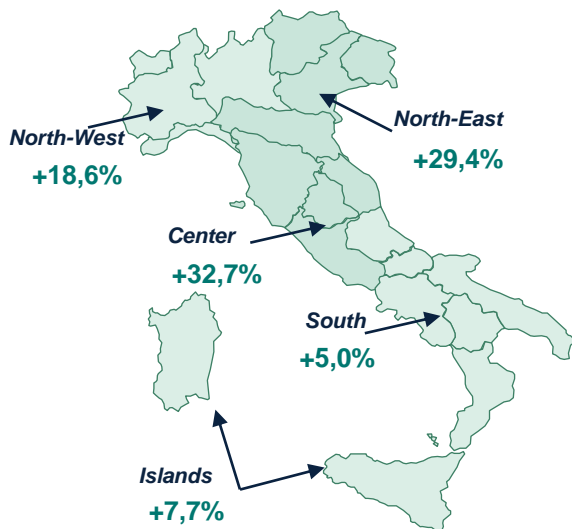
149.411
121.349

23,1%



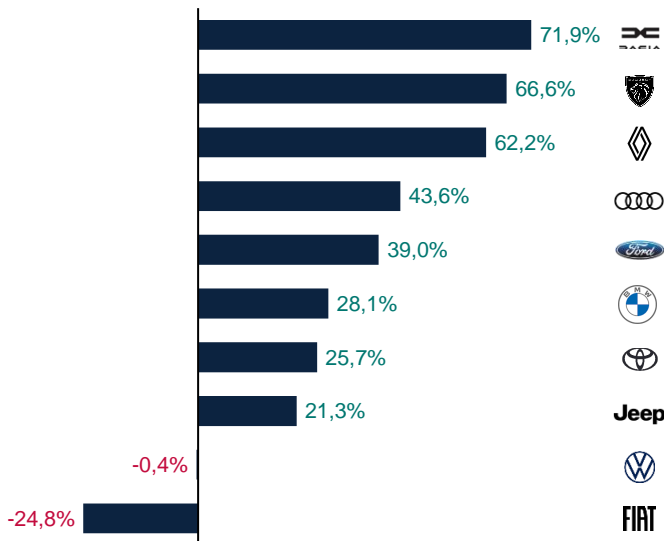
Δ% Volume 23/22 of New Car Registrations

Δ% May 2023/ May 2022



Growth of Top 10 Brands by Volumes

Δ% May 2023/ May 2022



! Highlights

- In **May 2023**, the Italian Market confirmed the positive result of April 2023, even if to a lesser extent, with an increase of +23,1% compared to May 2022
- The highest growth** for **Dacia** (+71,9%), **Peugeot** (+66,6%) and **Renault** (+62,2%).
- Considering the top 10 brands by volume, the only ones to decrease are **Volkswagen** (-0,4%) and **Fiat** (-24,8%)
- Although every region of the **Italian Market** registered an increase, **Central** and **Northern** regions grew at a decidedly higher rate than the **South** and **Islands**

Italy | Market Overview

Italian Market – May 2023 YTD vs May 2022 YTD

Italy New Car Registrations (YTD)

2023
2022

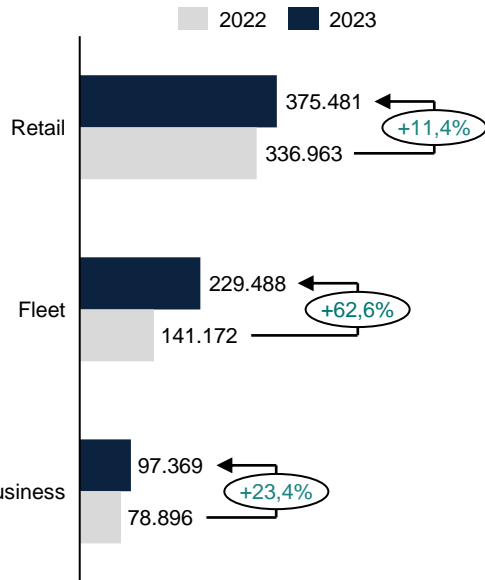
702.339
557.031

26,1%



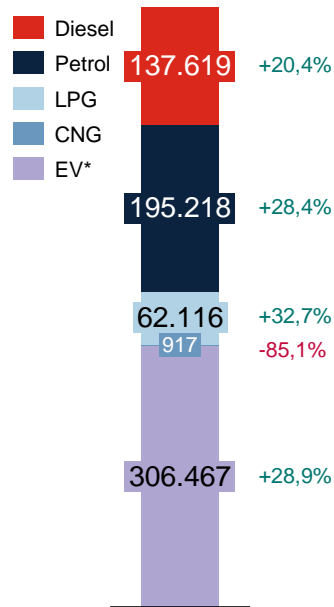
Analysis by “Customer Segment”

Registration YTD '23/'22



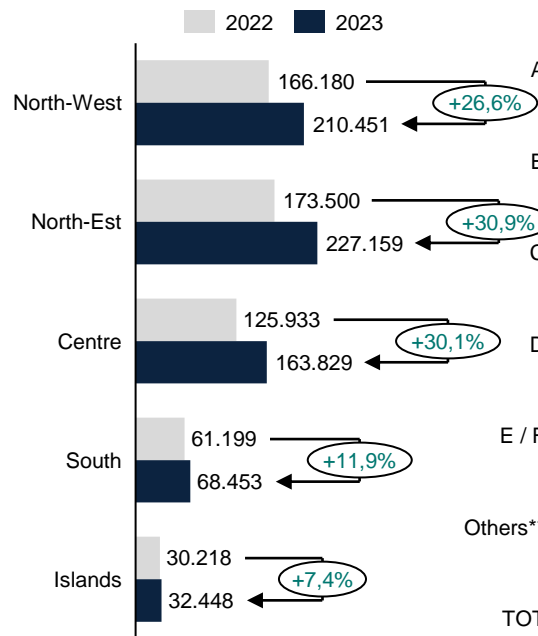
Analysis by “Fuel Type”

Registration YTD '23



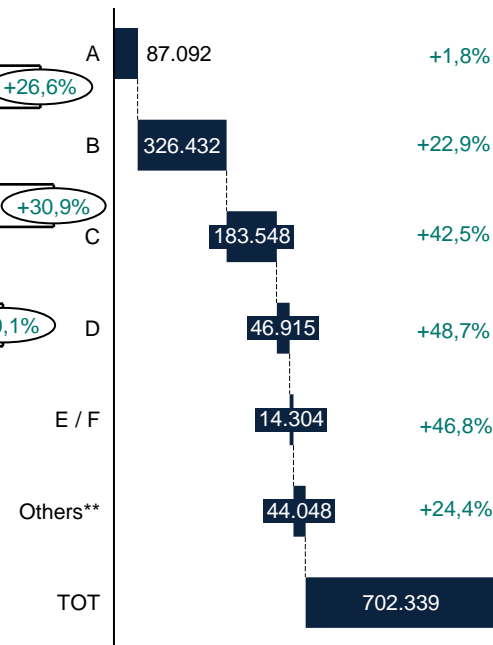
Analysis by “Geographical Area”

Registration YTD '23/'22



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

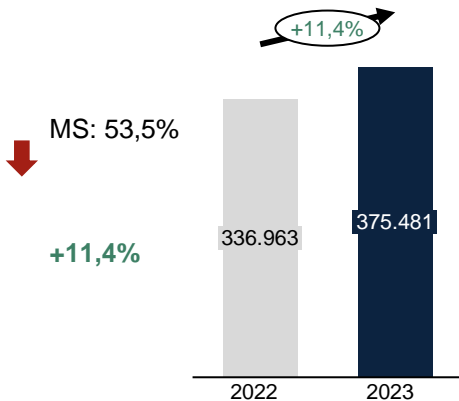
Italy | Market Highlights

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

Italy New Car Registrations (YTD)

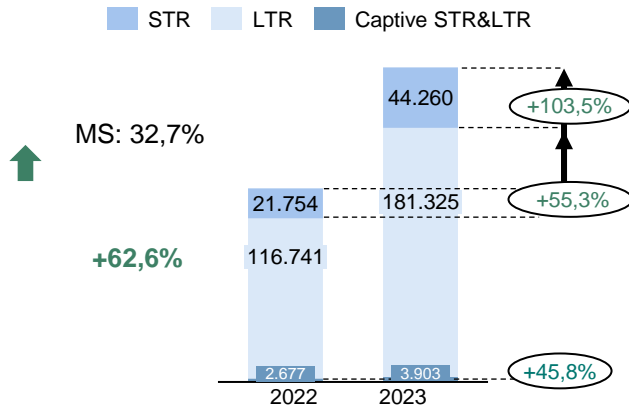


Retail (Private Customers)



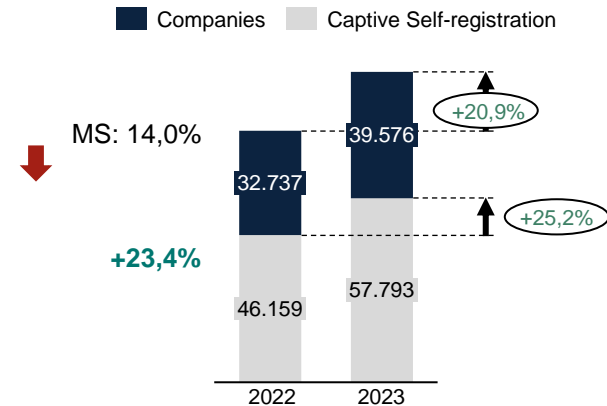
- Compared to **May 2022 YTD**, in **2023** the **Retail** segment registered an increase of +11,4% (38.518 additional units sold) but also the largest drop in terms of Market Share -7,0 p.p. (53,5% in May 2023 vs. 60,5% in May 2022), continuing to lose share to the Fleet segment

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



- Fleet segment** confirmed in May YTD 2023 the positive result (+62,6%) already recorded in April, led mainly by the **LTR** cluster. Among the three channels, Fleet is the only one that showed an increase in its Market Share (+7,4 p.p.), led by **STR** (+2,4 p.p., 6,3% in May 2023 YTD vs 3,9% in May 2022 YTD) and **LTR** (+4,8 p.p., 25,8% in May 2023 vs 21,0% in May 2022)

Business (Company registrations**)



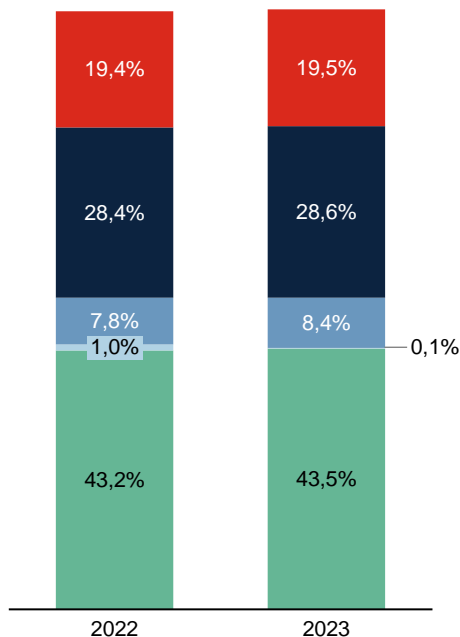
- The growth of the **Business segment** registrations in **May 2023** is linked both to the increase of **Companies registrations** (+20,9% or 6.840 additional units sold), and **Captive self-registrations** (+25,2% or 11.634 units sold).

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



“Fuel Type” mix evolution (Market Share)

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



	HEV	PHEV	BEV
MS May '22	33,5%	6,1%	3,6%
MS May '23	34,7%	4,7%	4,1%
MS Delta May '23 vs. '22	+1,2 p.p.	-1,4 p.p.	+0,5 p.p.

- In May 2023 **EV** showed a slight increase in their Market Share (+0,3 p.p.) compared to 2022, reversing the negative result recorded in April 2023 (-1,0 p.p.)
- CNG continued to decline (-0,9 p.p.); the other fuel types experienced an increase (Diesel, +0,1 p.p., Petrol, +0,2 p.p., LPG, +0,6 p.p.)
- **Hybrid Electric Vehicles (HEVs)** and **Battery Electric Vehicles (BEVs)** increased their Market Share (+1,2 p.p. and +0,5 p.p.).

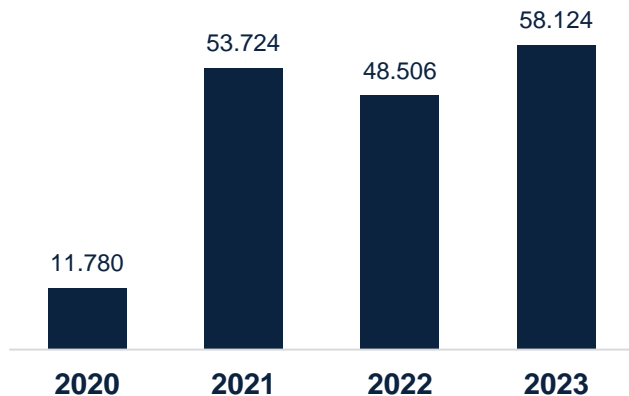
Italy | New car registrations by fuel type



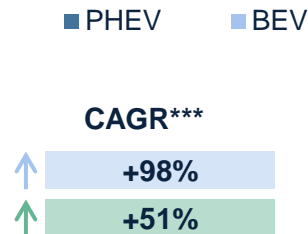
New car registrations of Hybrid vs Pure Electric vehicles

PHEV and BEV Registrations Trend May '23 YTD

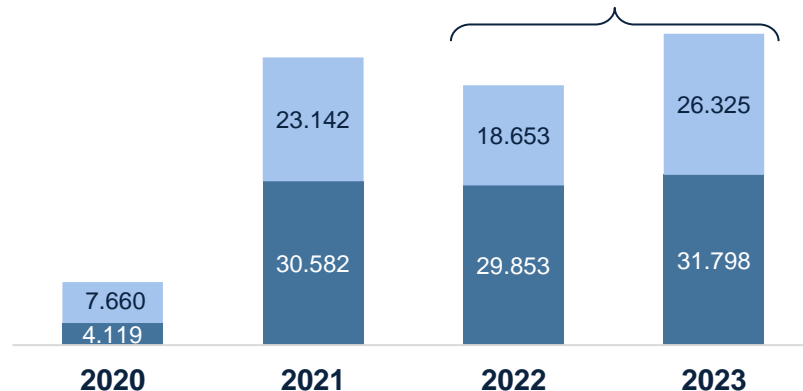
Delta YoY	110%	356%	-10%	20%
M.S.	2,6%	7,3%	8,7%	8,3%



PHEV* and BEV** Vehicles Trend May '23 YTD



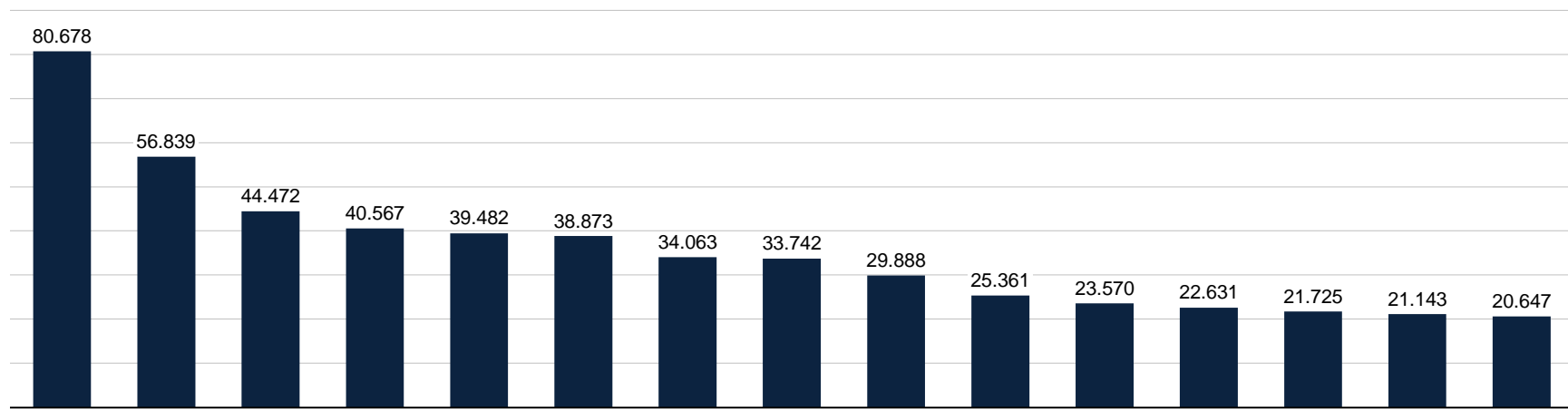
Even if **PHEV** and **BEV** registrations grew in 2023 compared to 2022 (+20%), their **MS** slightly **decreased** (-0,4 p.p.). The current level of PHEV and BEV in Italy is far below expectations and behind the shares recorded in the main **European countries** (on average for the top 10 European Countries by volume, **27% M.S.**, **+41% growth** 2023 vs 2022)



Italy | New car registrations by brand



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



Δ Vol. 23/22	-1,42%	+30,22%	+21,60%	+31,09%	+8,50%	+38,19%	+46,46%	+43,84%	+36,63%	+21,55%	-2,43%	+8,85%	+20,04%	+17,30%	+25,87%
--------------	--------	---------	---------	---------	--------	---------	---------	---------	---------	---------	--------	--------	---------	---------	---------

M.S. '23	11,49%	8,09%	6,33%	5,78%	5,62%	5,53%	4,85%	4,80%	4,26%	3,61%	3,36%	3,22%	3,09%	3,01%	2,94%
----------	--------	-------	-------	-------	-------	-------	-------	-------	-------	-------	-------	-------	-------	-------	-------

Δ M.S. 23/22	-21,78%	+3,19%	-3,65%	+3,96%	-13,94%	+9,50%	+16,03%	+14,01%	+8,40%	-3,73%	-22,58%	-13,67%	-4,92%	-7,10%	+0,00%
--------------	---------	--------	--------	--------	---------	--------	---------	---------	--------	--------	---------	---------	--------	--------	--------

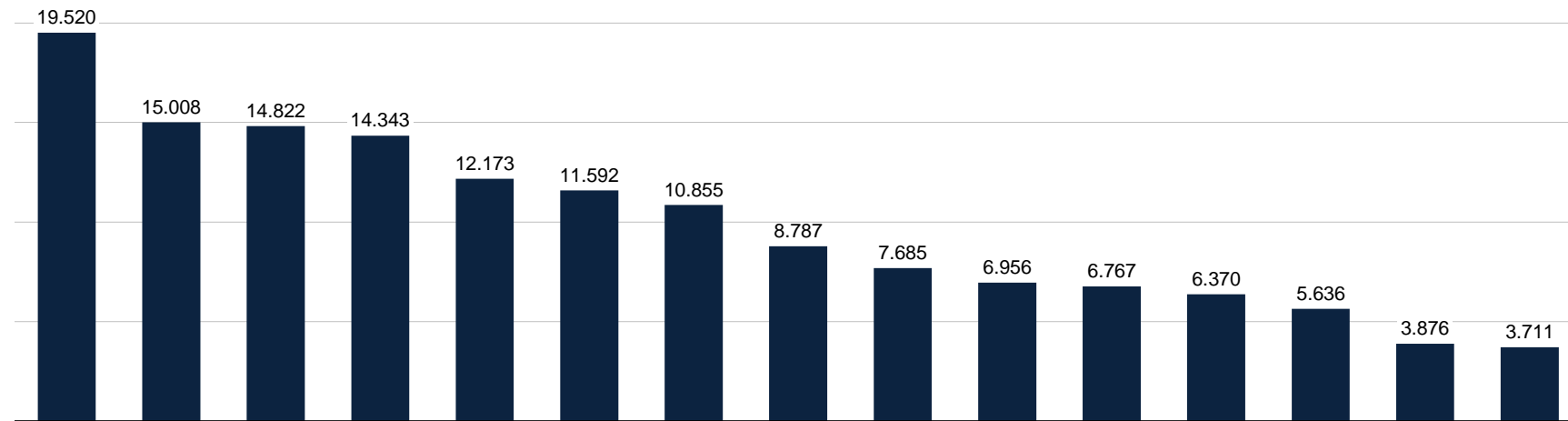


Source: UNRAE

Italy | New car registrations by brand



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



Δ Vol. 23/22	+9,87%	+57,78%	+33,52%	+43,20%	+136,32%	+172,82%	+432,89%	+25,26%	+35,18%	+67,45%	+380,61%	+49,04%	-11,80%	+22,35%	+45,13%
M.S. '23	2,78%	2,14%	2,11%	2,04%	1,73%	1,65%	1,55%	1,25%	1,09%	0,99%	0,96%	0,91%	0,80%	0,55%	0,53%
Δ M.S. 23/22	-12,85%	+25,15%	+6,03%	+13,33%	+88,04%	+117,11%	+318,92%	-0,79%	+6,86%	+32,00%	+284,00%	+18,18%	-30,43%	-3,51%	+15,22%



Source: UNRAE

Italy | New car registrations by brand



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



LYN & CO

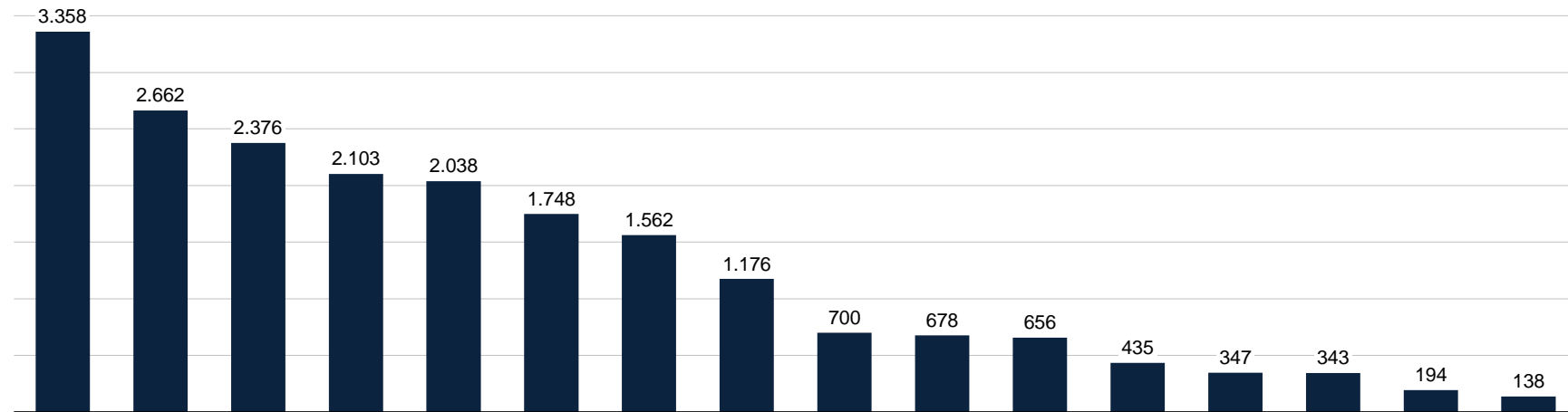


JLR

Others



Polestar



Brand	M.S. '23	Δ M.S. 23/22 (%)
Porsche	0,48%	+0,00%
LYN & CO	0,38%	+90,00%
Honda	0,34%	-49,25%
Abarth	0,30%	-9,09%
Alfa Romeo	0,29%	-34,09%
Maserati	0,25%	+127,27%
Lexus	0,22%	-24,14%
Subaru	0,17%	+30,77%
JLR	0,10%	-50,00%
Others	0,10%	+100,00%
Mitsubishi	0,09%	-52,63%
Polestar	0,06%	n.a.
Aston Martin	0,05%	+150,00%
Ferrari	0,05%	-16,67%
Lamborghini	0,03%	+0,00%
Kia	0,02%	-50,00%



Source: UNRAE

Italy | New car registrations by group



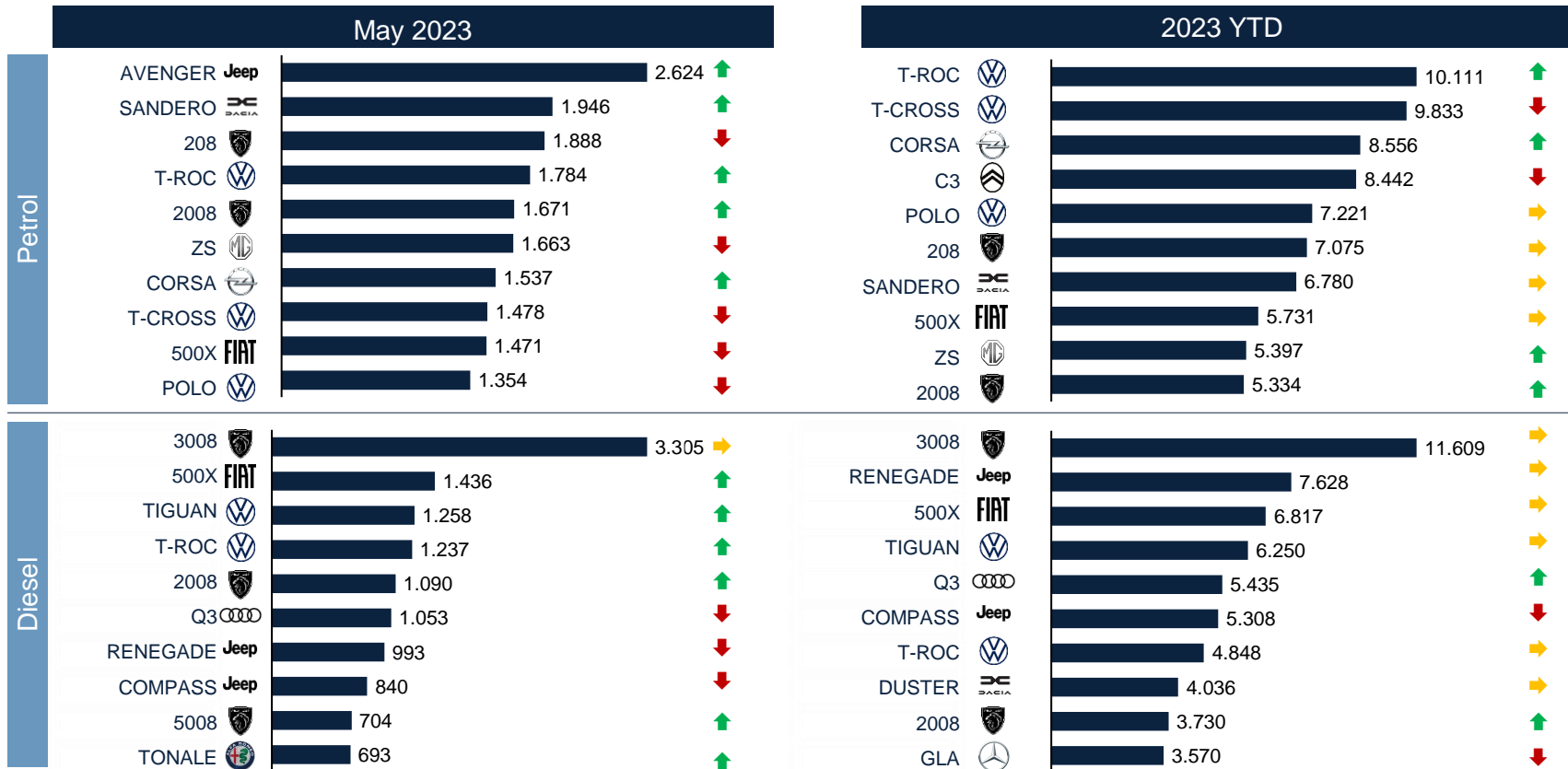
New car registrations by group – Top 15 – May 2023 YTD

	Group	Brand	Volume	Δ% Volume '23 vs '22	Market Share (%)
1	Stellantis		237.759	15,2%	33,9%
2	Volkswagen		113.270	31,2%	16,1%
3	Renault		72.936	41,9%	10,4%
4	Toyota		46.034	20,5%	6,6%
5	Ford		39.482	8,5%	5,6%
<i>Top 5: 72,6%</i>					
6	BMW		34.148	22,5%	4,9%
7	Mercedes-Benz		23.828	19,4%	3,4%
8	Kia		21.143	17,3%	3,0%
9	Hyundai		20.647	25,9%	2,9%
10	Suzuki		15.008	57,8%	2,1%
<i>Top 10: 88,9%</i>					
11	Nissan Group		14.822	33,5%	2,1%
12	DR Group		14.211	87,0%	2,0%
13	MG		10.855	432,9%	1,6%
14	Volvo		7.685	35,2%	1,1%
15	Mazda		6.956	67,5%	1,0%

Italy | New car registrations by fuel type



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



Source: UNRAE

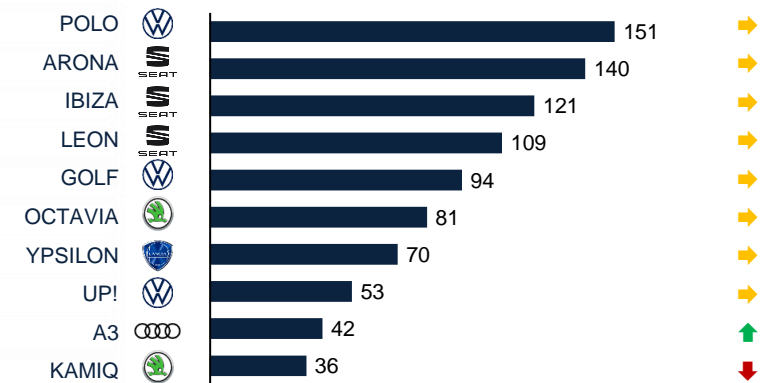
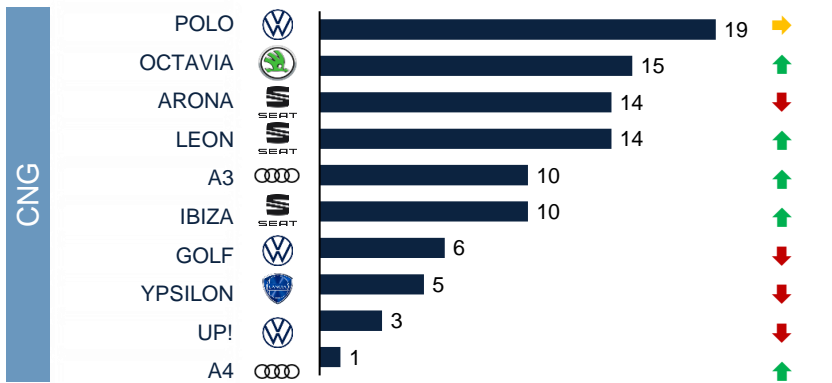
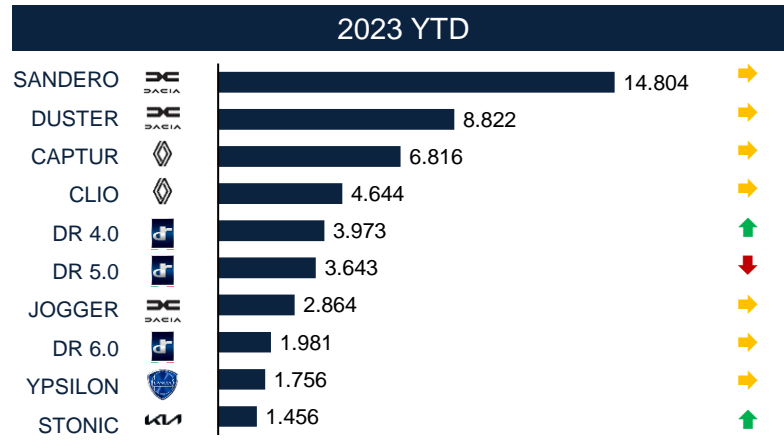
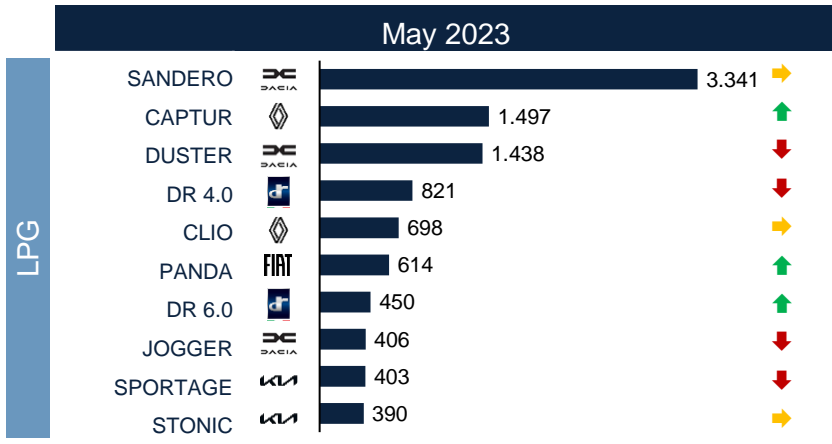


Ranking variation compared to previous period

Italy | New car registrations by fuel type



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



Source: UNRAE

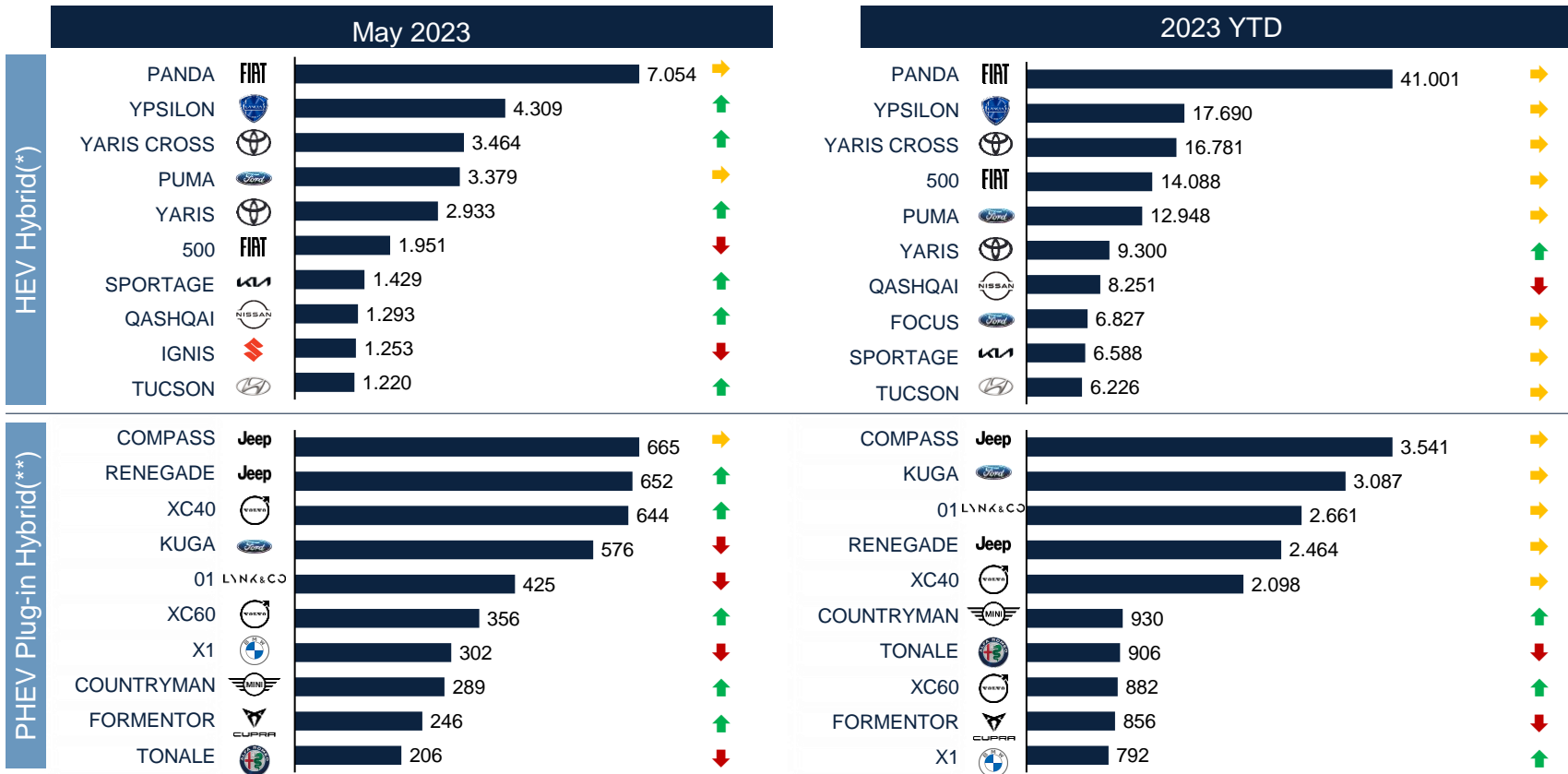


Ranking variation compared to previous period

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)

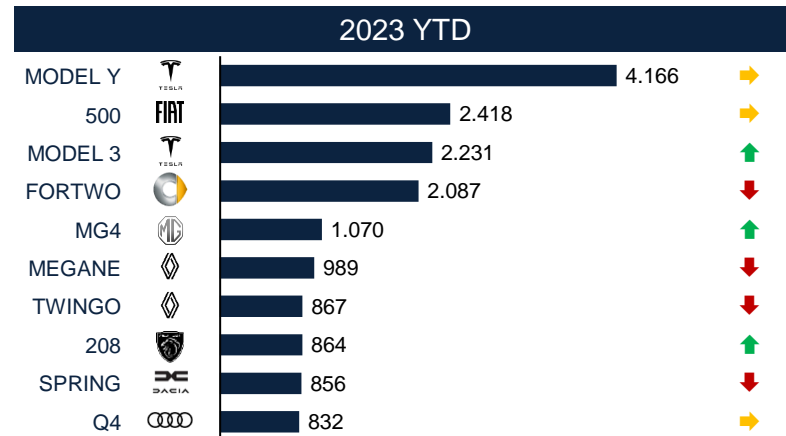
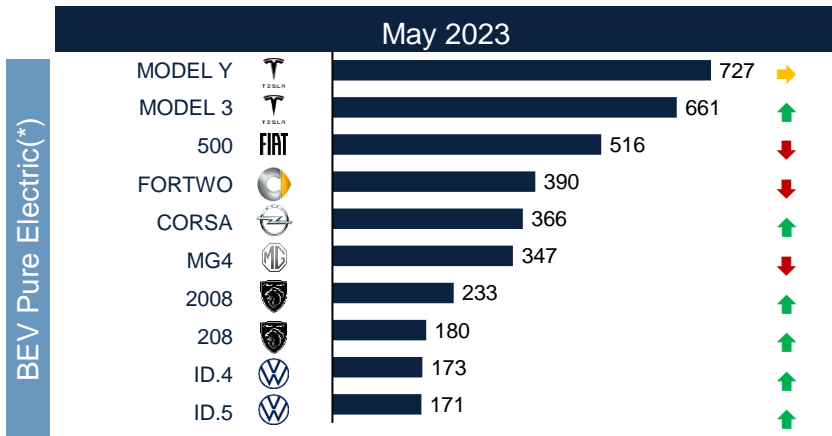


Ranking variation compared to previous period

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»



-2,9 p.p.

B
«Supermini»



-1,2 p.p.

C
«Medium»



3,0 p.p.

D
«Executive»



0,9 p.p.

E/F
«Luxury &
Ultra Luxury»



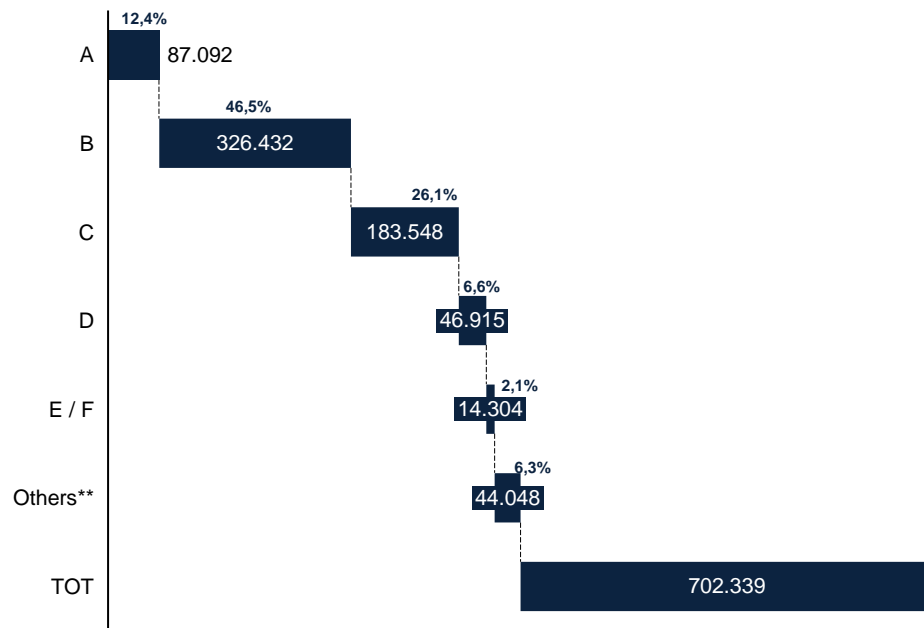
0,4 p.p.

Others
«Station wagon,
MPV, Sportive»



-0,2 p.p.

Market Share and Volume**



Italy | New car registrations by segment

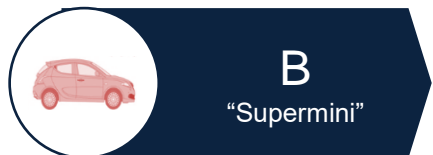
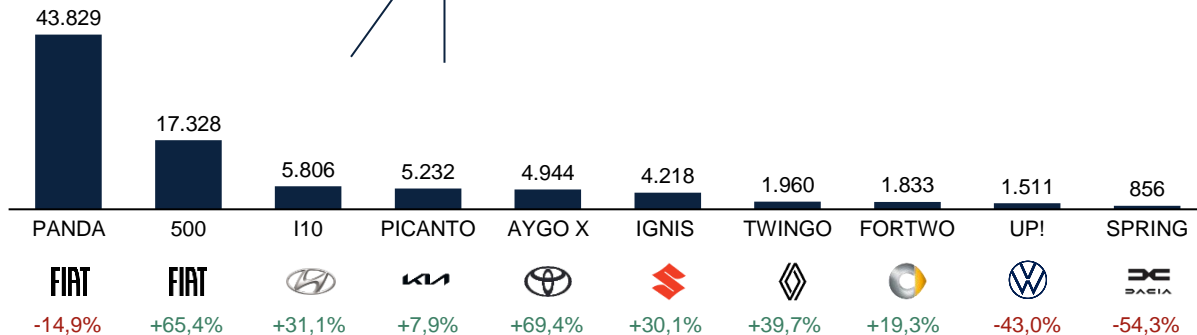


Segment A and Segment B – Top 10 – May '23 YTD

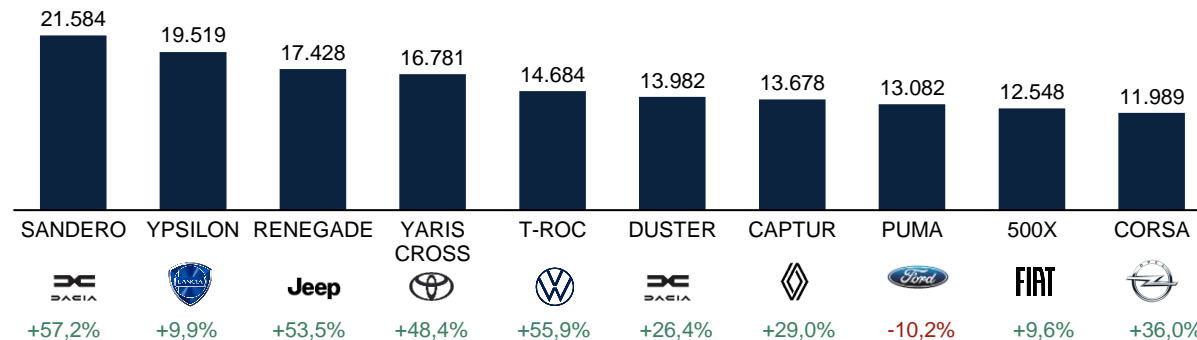
In terms of **MS**, in May 2023 YTD both **Segment A** and **Segment B** registered a decrease (-2,9 p.p. and -1,2 p.p.) vs May 2022. Considering the volumes, in May 2023 both **Segment A** and **Segment B** increased vs. May 2022 (+1,8% and +22,9%)



Δ Vol. %
23/22 YTD



Δ Vol. %
23/22 YTD



Italy | New car registrations by segment

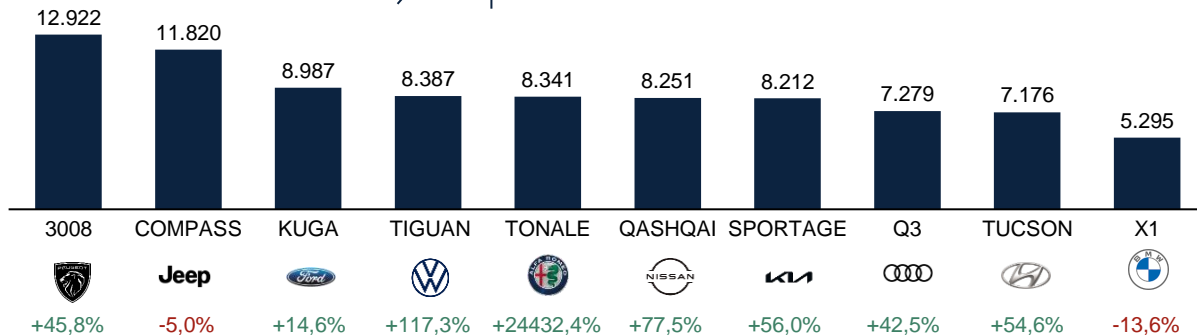
Segment C and Segment D – Top 10 – May '23 YTD



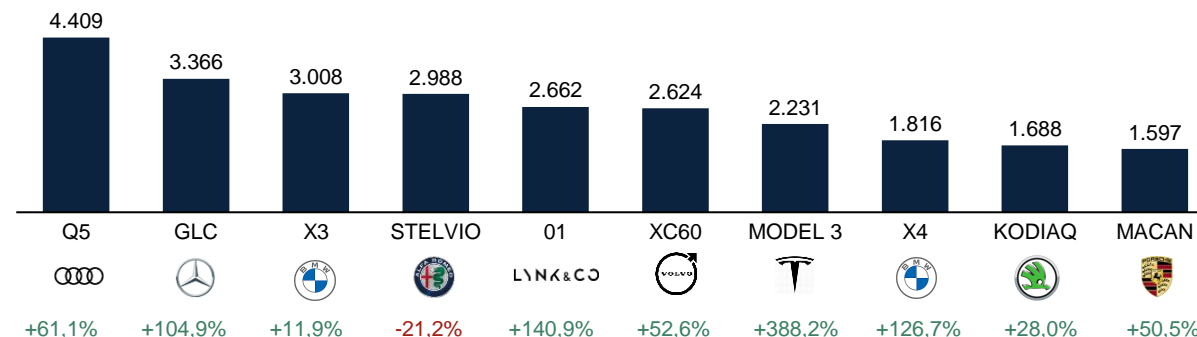
In terms of **MS**, in May 2023 YTD both **Segment C** and **Segment D** registered an increase (+3,0 p.p. and +0,9 p.p.) vs May 2022. Considering the volumes, in May 2023 YTD both **Segment C** and **Segment D** increased vs. May 2022 (+42,5% and +48,7%)



Δ Vol. %
23/22 YTD



Δ Vol. %
23/22 YTD



Italy | New car registrations by segment

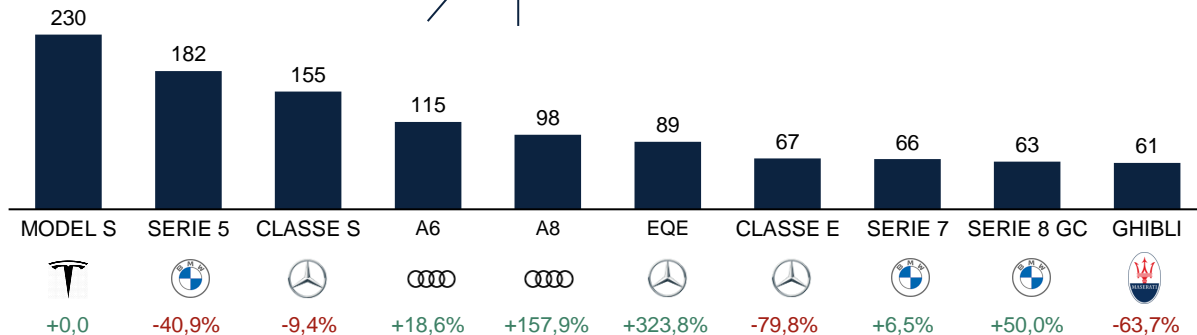


Segment E/F and Others – Top 10* – May '23 YTD

In terms of **MS**, in May 2023 YTD, **Segment E/F** registered an increase (+0,4 p.p.) while **Others** decreased (-0,2 p.p.) vs May 2022. In terms of volumes, in May 2023 YTD both **Segment E/F** and **Others** increased (+46,8% and +24,4%) vs. May 2022

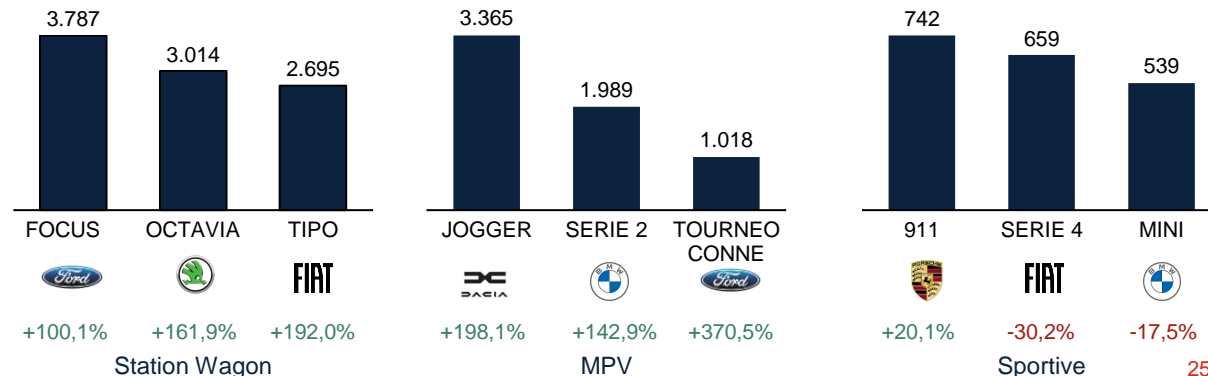
E/F
"Luxury & Extra Luxury"

Δ Vol. %
23/22 YTD



Others
"Station Wagon, MPV, Sportive"

Δ Vol. %
23/22 YTD





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														
Jun				Serie 7, X5, M2 →										
Jul				M3CS 							B-Suv 		CR-V 	Santa Fe
Aug	Brennero 			X2, iX2 								Kuga 	Civic Type R →	
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				
Jun					Gran Cabrio e Turismo/ Folgore	ASX
Jul				EV9		Colt
Aug				Urus Evo		
Sep				Aventador		
Oct						
Nov						
Dec						

New Car Models Launches in Italy

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

	O	P	R	SEAT		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					BZ4x →	Touareg →		
Sep			911 Safari							Tiguan	XC 20 →	
Oct		3008 Mild Hybrid		Scenic E-Tech					Swift			
Nov		5008 Mild Hybrid									ID.Aero	
Dec			5 E-tech Elettric					Cybertruck	CH-R →	Golf		



01. Europe

02. Italy

03. New car models launches in Italy

04. Commercial & Industrial Vehicles

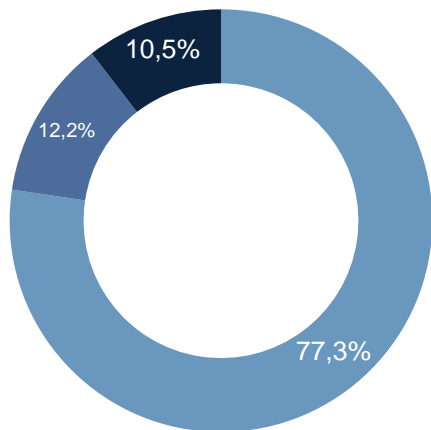
05. News on key industry trends



Commercial and Industrial Vehicles Highlights 2023

In **May 2023**, the **commercial and industrial vehicles Market** showed a **general growth** with a total of **22.919** new vehicles registered in the month (101.051 YTD). Both commercial and industrial vehicles registered an increase in May 2023 compared to May 2022, even if the former ($\leq 3,5t$) recorded a lower increase (+10,3%) respect to the latter, which report a greater growth in the **light mass segment $<16t$** (+24,6%) and in the **heavy mass segment $\geq 16t$** (+22,9%).

Vehicles YTD distribution by category



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

101.051

Total registered vehicles

+ 7.2%

compared to 2022 registrations

(94.304)

Commercial vehicles YTD

78.162 + 5.5% *

Light mass vehicles YTD

12.306 + 12.3% *

Heavy mass vehicles YTD

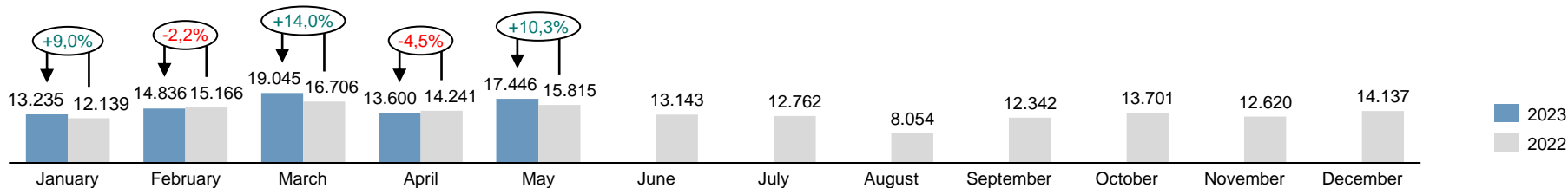
10.583 + 14.1% *

Italy | New Vehicles registrations

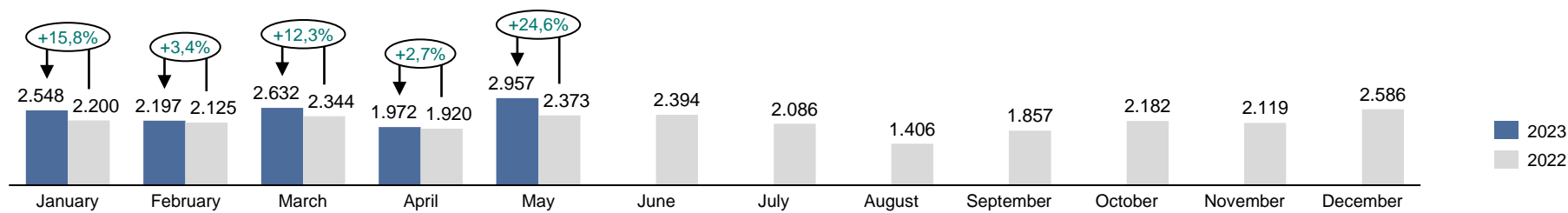


Italian Market - Commercial and Industrial vehicles Registration 2023 vs 2022 (2/2)

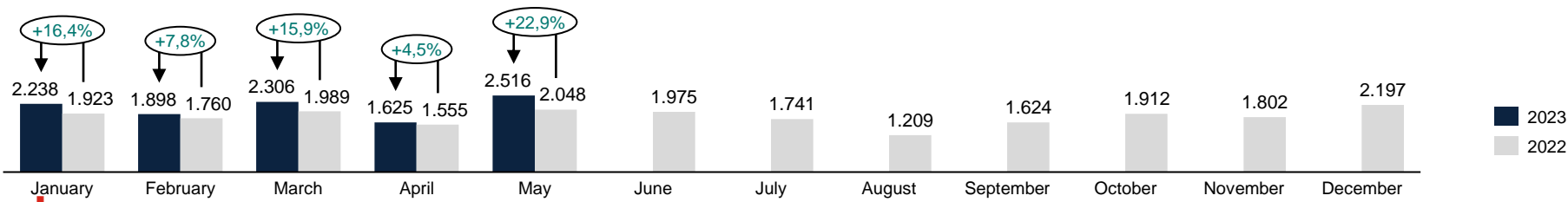
Commercial Vehicles ≤ 3,5t May 2023 YTD



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



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



Source: UNRAE Forecast



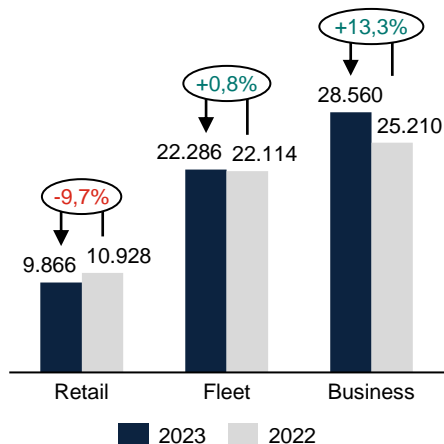
Commercial Vehicles January - April Analysis

In the first 4 months of **2023**, the **commercial vehicles** increased in new registrations (+4,2%), with a total of **60.712**, mainly driven by the **Business** and **Fleet segments**, while **Retail** recorded a **decrease**.

Regarding the fuel type, significative increases for **LPG** (+26,1%) and **Diesel** (+10,5%), while **Petrol**, **CNG** and **EV** continue to **decrease**.

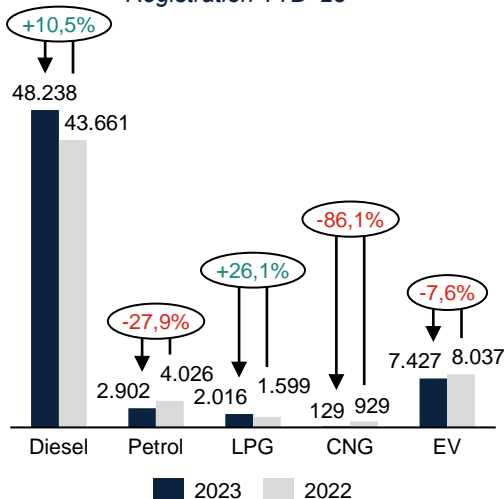
Analysis by "Customer Segment"

Registration YTD '23/'22

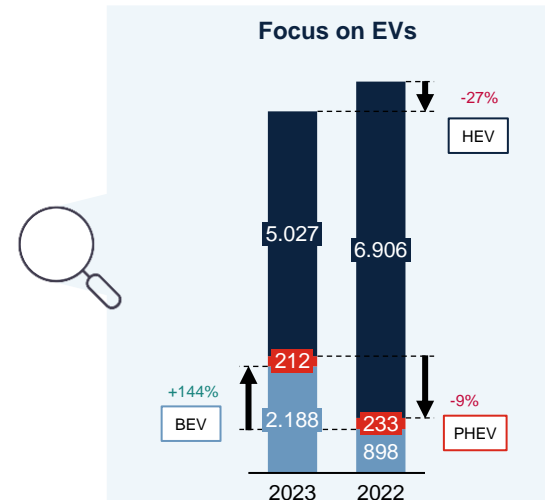


Analysis by "Fuel Type"

Registration YTD '23



Focus on EVs

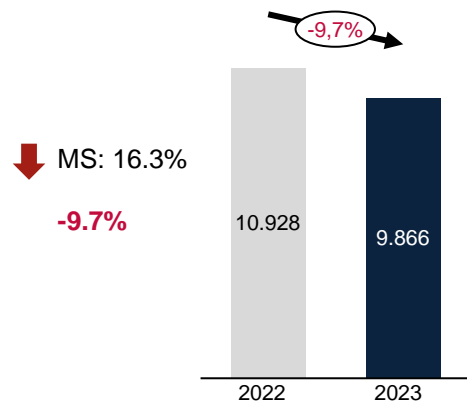


Italy | New Vehicles registrations



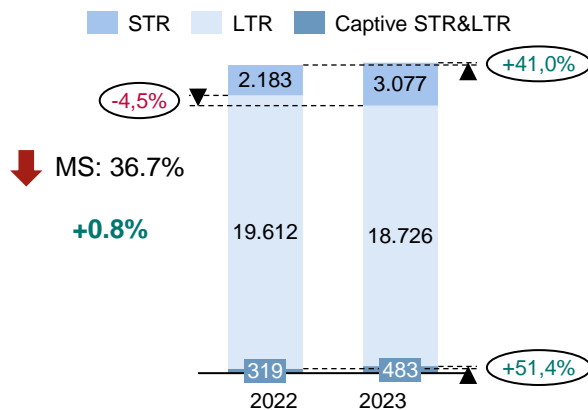
Italian Market - Commercial vehicles April 2023 YTD vs April 2022 YTD

Retail (Private Customers)



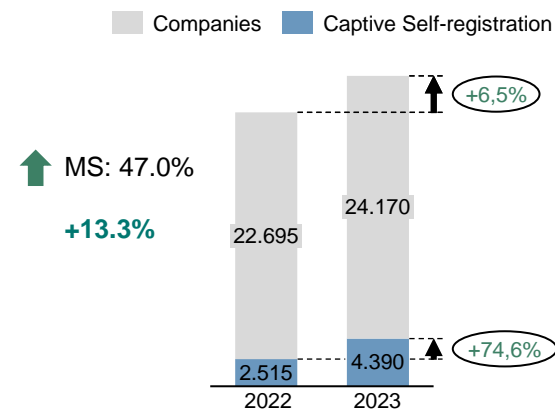
- Compared to **Apr 2022 YTD**, in the first 4 months of **2023**, the **Retail** segment registered a **decrease** both in terms of **registrations** (-9,7%) and **Market Share** (-2,5 p.p.: 16,3% in 2023 vs. 18,8% in 2022)

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



- Captive STR<R** (+51,4%), **STR** (+41,0%) registered an increase, while **LTR** (-4,5%) recorded a decrease in **Jan to Apr 2023 over the same period in 2022**. The **Market Share** of **Captive STR<R** (0,8% in Apr 2023 YTD vs 0,5% in Apr 2022 YTD) and **STR** (5,1% in Apr 2023 YTD vs 3,7% in Apr 2022 YTD) **increased**, while the **LTR** Market Share **decreased** (30,8% in Apr 2023 YTD vs 33,7% in Apr 2022 YTD)

Business (Company registrations**)



- The increase of the **Business** segment registrations in **Apr 2023 YTD** is mainly related to the increase of **Captive self-registrations** (+74,6% or 1.875 units sold), and to a minor extent to **Companies registrations** (+6,5% or 1.475 additional units sold)

Market Share increase / decrease Jan-Apr 2023 / Jan-Apr 2022

Δ Volume Jan-Apr 2023 / Jan-Apr 2022



01. Europe

02. Italy

03. New car models launches in Italy

04. Commercial & Industrial Vehicles

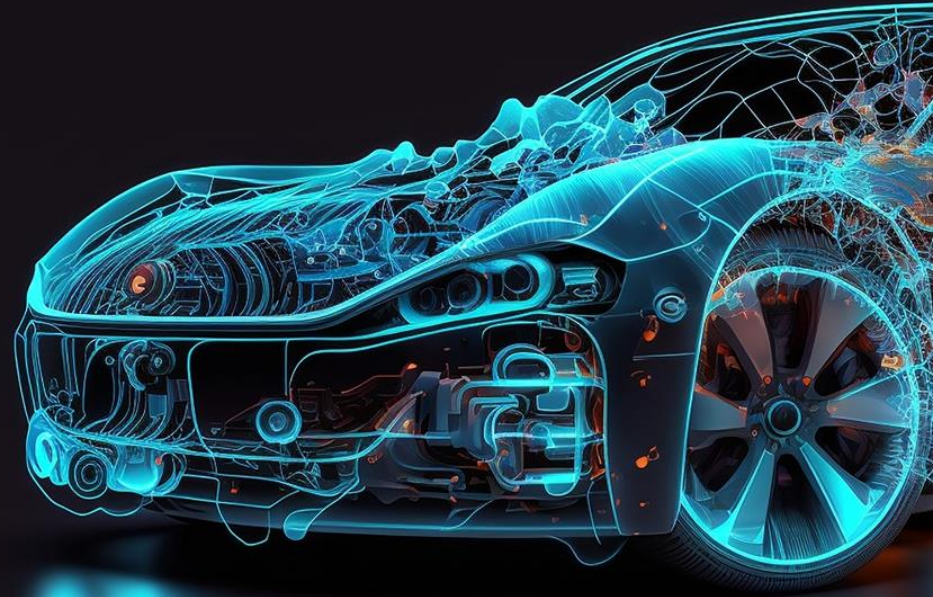
05. News on key industry trends



SAVE THE DATE
July 19th 10:30

Automotive towards 2035

Market trends
Industry challenges
Infrastructure readiness



STAY TUNED

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 02/05/2023 to 16/06/2023



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



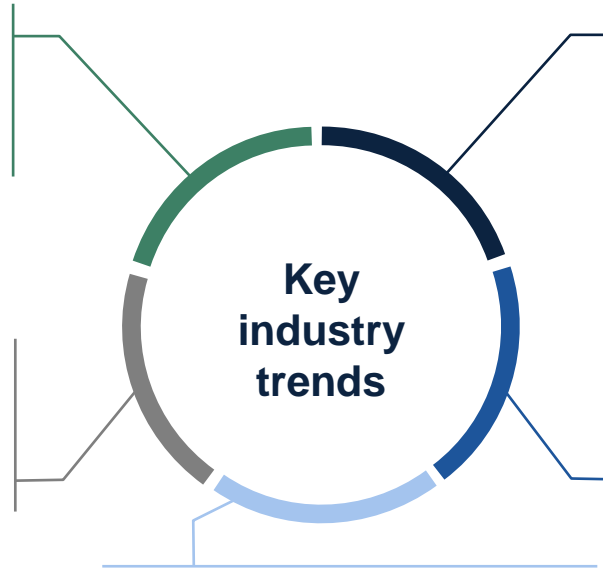
Electrification

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



Lotus chooses Stripe to power payments for its direct-to-consumer strategy

Stripe, a financial infrastructure platform for businesses, today announced that it has been selected by Lotus as an exclusive payments partner for the automaker's direct-to-consumer sales strategy across mainland Europe (...)

<https://www.automotiveworld.com/news-releases/lotus-chooses-stripe-to-power-payments-for-its-direct-to-consumer-strategy/>



News on key industry trends

Electrification (1/3)



Enel X Way and Conad: agreement for electric deliveries in Rome and Palermo

EnelX Way and Conad decided to collaborate on a logistics project. These 100% electric delivery vehicles will travel around 450-500 km every day and contribute to the reduction of CO2 emissions in the transport sector. Soon also in **Turin and Florence (...)**

<https://www.hdmotori.it/auto/articoli/n570575/enel-x-way-conad-consegne-mezzi-elettrici/>

Ford announces new EV charging partnerships with Tesla

Ford has announced a new agreement with Tesla, through which the EV-focused OEM will provide Ford's customers with access to its network of EV Superchargers across North America, from Spring 2024 (...)

<https://telematicsnews.info/2023/05/26/ford-announces-new-ev-charging-partnerships-with-tesla/>

Be Charge with Ikea for 250 in-store charging stations

Plenitude Be Charge has signed a partnership with Ikea for the installation of 250 state-of-the-art recharging stations in the car parks of the chain's shops nationwide (...)

<https://e-ricarica.it/be-charge-con-ikea-per-250-stazioni-di-ricarica-nei-punti-vendita/>



News on key industry trends

Electrification (2/3)



E.ON orders 4.500 electric charging stations from Italy's Alpitronic

The German company E.ON has ordered 4.500 fast-charging columns from the Italian manufacturer Alpitronic. The new charging stations will be used in customer projects and for public charging by 2025 (...)

<https://finanza.lastampa.it/News/2023/05/31/e-on-ordina-4-500-colonnine-di-ricarica-elettrica-dallitaliana-alpitronic/NTFfMjAyMy0wNS0zMV9UTEI>

LG Energy Solution & Hyundai Motor Group to establish U.S battery cell manufacturing JV

LG Energy Solution (LGES) and the Hyundai Motor Group will establish a new EV battery cell manufacturing joint venture in the U.S. The companies signed a memorandum of understanding to produce EV batteries in the U.S. (...)

<https://telematicsnews.info/2023/05/26/lg-energy-solution-hyundai-motor-group-to-establish-u-s-battery-cell-manufacturing-jv/>

The Fiat Topolino is back

Fiat has confirmed the relaunch of the new Topolino, an electric microcar with a styling inspired by the 500 based on the Citroën Ami. It is equipped with an 8-horsepower electric motor powered by a 5.5 kWh battery capable of providing a city range of around (...)

<https://www.alvolante.it/news/fiat-topolino-2023-prime-immagini-e-video-384753>



News on key industry trends

Electrification (3/3)



BMW and E.ON together to launch a dedicated offer for home charging of electric cars

The offer of BMW and E.ON aims at the creation of an ecosystem in which cars, smart homes and the electric grid talk to each other, in the name of stability and cost-effectiveness. It will be available in several European countries, but at different conditions (...)

<https://www.dmove.it/news/bmw-ed-eon-insieme-per-il-lancio-di-unofferta-dedicata-alla-ricarica-domestica-delle-auto-elettriche>

The R5 will have bi-directional charging

The R5 will have bi-directional charging. With the ability through the charger not only to absorb energy, but to supply it where it is needed (even to the mains). The new Renault will thus benefit from the Mobilize V2G service, while preserving battery capacity (...)

<https://www.vaielettrico-it.cdn.ampproject.org/c/s/www.vaielettrico.it/la-r5-avra-la-ricarica-bidirezionale/?amp=1>

General Motors: agreement with Tesla to use Supercharger network

After Ford, another American automotive giant is entering into an agreement with Tesla for the use of the Supercharger network. Following the formalization of the partnership with the brand created by Elon Musk, General Motors will guarantee its customer (...)

<https://e-ricarica.it/general-motors-intesa-con-tesla-per-lutilizzo-della-rete-supercharger/>



News on key industry trends

Connectivity



Webex by Cisco delivers First app for hybrid work to Audi vehicles

Cisco and Audi unveiled plans to enhance mobile car collaboration experiences for hybrid workers. In partnership with CARIAD and HARMAN, Webex will be the first app for hybrid work available in select Audi models as of the 2024 model year (...)

<https://telematicsnews.info/2023/06/02/webex-by-cisco-delivers-first-app-for-hybrid-work-to-audi-vehicles/>

Honda created new Driver Coaching app

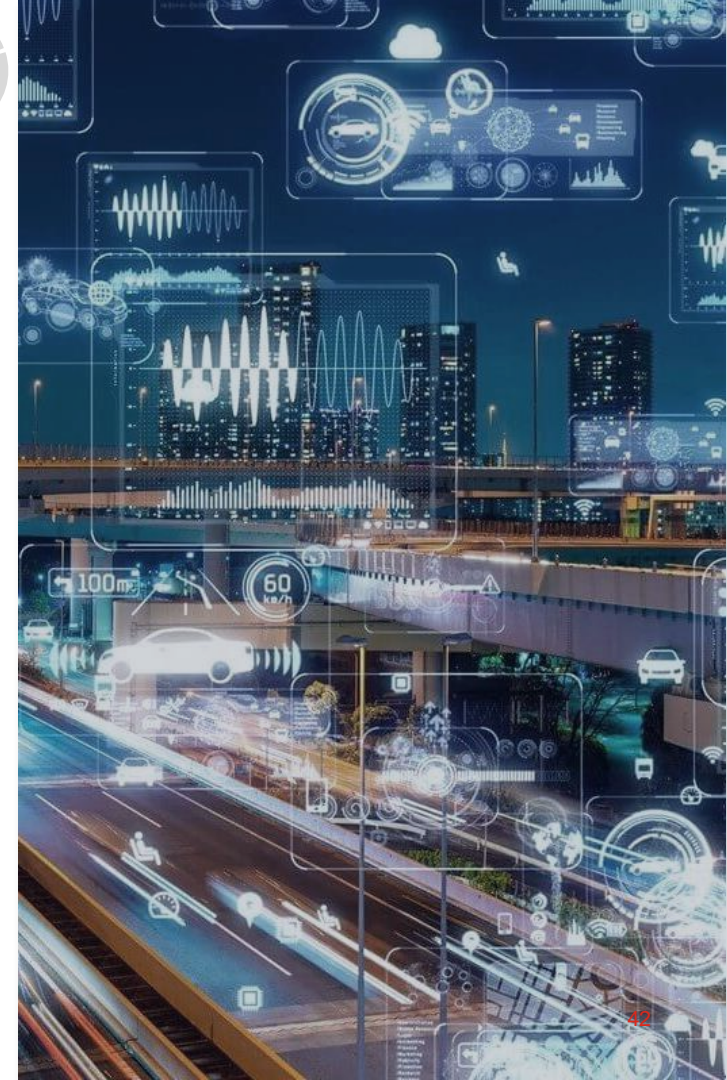
Honda announced the creation of the new Honda Driver Coaching smartphone app, designed to help improve the skills of new drivers and promote safe driving practices. Honda Driver Coaching, free to download from the Apple App Store (...)

<https://telematicsnews.info/2023/06/06/honda-created-new-driver-coaching-app/>

MediaTek & Nvidia partner on intelligent, software-defined cabin solutions

MediaTek has announced a new partnership with Nvidia, through which the companies plan to jointly enable connected, software-defined, in-vehicle experiences through a new Nvidia GPU chiplet (...)

<https://telematicsnews.info/2023/05/30/mediatek-partners-with-nvidia-for-intelligent-cabin-solutions/>



News on key industry trends



Mobility Services

Ford Mobile Service also arrives in Italy

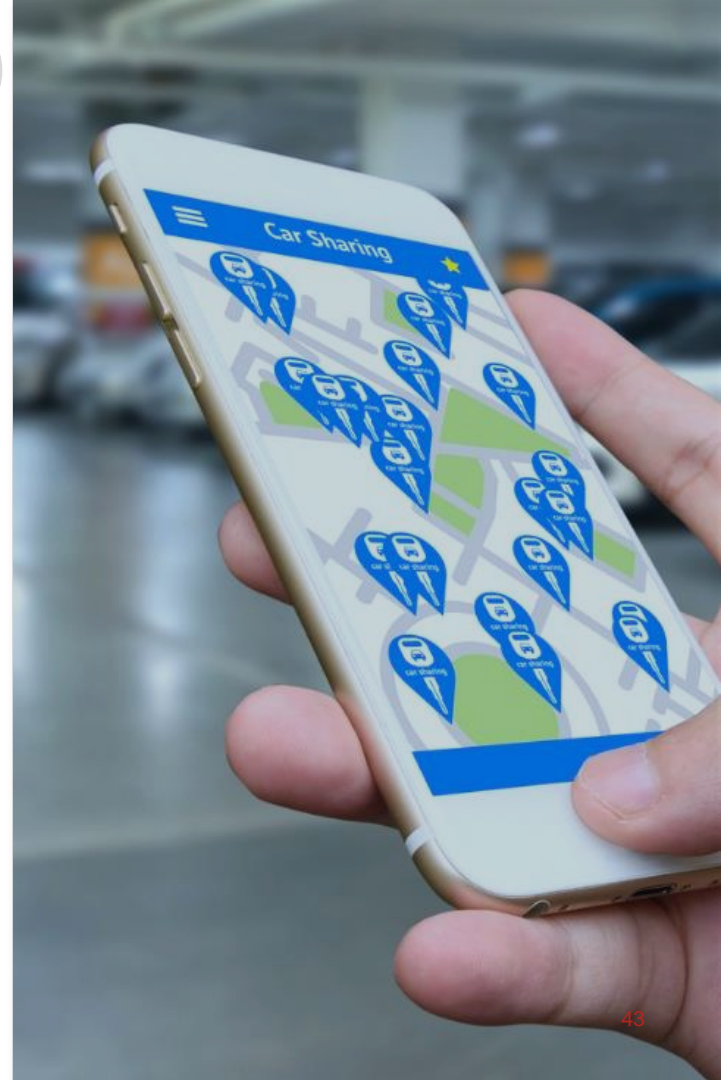
The service will provide business customers with a fleet of vans dedicated to on-site service. The Blue Oval's mobile workshops - set up with the cooperation of the Würth Group, through its ORSYmobil division - will make it possible to reduce downtime (...)

https://www.fleetmagazine.com/ford-mobile-service-anche-in-italia/?utm_source=linkedin

Ford Next launches flexible EV lease pilot with Uber

Ford Next has announced Ford Drive – a new service created with Uber intended to offer consumers a new lease option for EVs. The pilot program will offer flexible access to the OEM's Mustang Mach-E models in three U.S. cities – San Diego, San Francisco, (...)

<https://telematicsnews.info/2023/06/02/ford-next-launches-flexible-ev-lease-pilot-with-uber/>



News on key industry trends

Sustainability



Stellantis and Galloo to form joint venture for End-of-Life Vehicle recycling

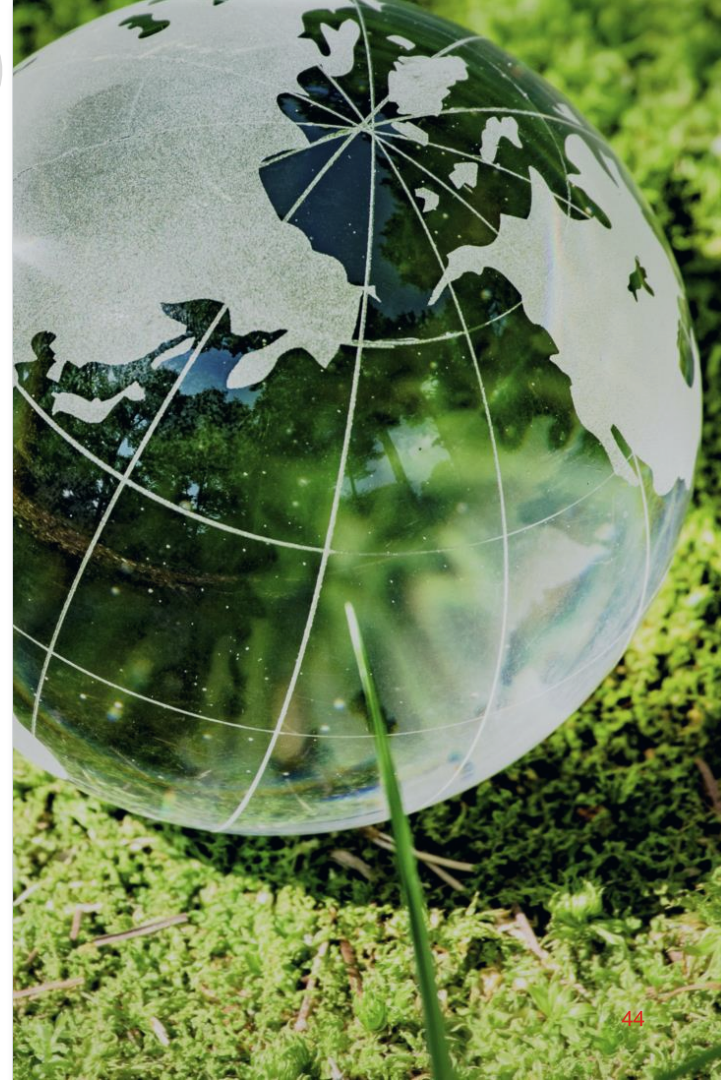
Stellantis N.V. and leading metals recycler Galloo announced they have signed a Memorandum of Understanding to enter into exclusive negotiations to form a joint venture focused on End-of-Life Vehicle (ELV) recycling(...)

<https://www.automotiveworld.com/news-releases/stellantis-and-galoo-to-form-joint-venture-for-end-of-life-vehicle-recycling/>

Stellantis and Hype deploy a first fleet of 50 wheelchair-accessible hydrogen taxis in Paris

Stellantis and Hype announce today their partnership for the supply and operation of hydrogen-powered vehicles, the first step being the delivery, from 2023, of a first batch of 50 zero-emission PRM taxis in Paris (...)

<https://www.automotiveworld.com/news-releases/stellantis-and-hype-deploy-a-first-fleet-of-50-wheelchair-accessible-hydrogen-taxis-in-paris/>



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

Director

massimiliano.tortorella@bip-group.com

cell. +39 334 620 9636

