

BIP AutoObserver

Analysis of new car registrations

June 2023



Executive Summary

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



Europe*

+18,7%

Top Countries by growth of new registrations: 30 countries grew in June 2023 compared to June 2022, the highest rates for Belgium (+48,7%), Croatia (+43,7%) and Portugal (+41,7%). Only Hungary decreased (-1,4%)

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

Brands: among the **Top 15 by volume**, the highest growth comparing June 2023 to June 2022 for Audi (+43,4%), Skoda (+25,6%) and Volkswagen (+21,7%), while the highest decrease for Fiat (-11,9%)

Premium brands:** all 3 German Premium brands increased both in the month of June 2023 and YTD, Audi (+43,4% monthly and +26,1% YTD), BMW (+11,7% monthly and +9,6% YTD) and Mercedes-Benz (+7,1% monthly and +8,2%YTD)



Italy

+ 9,2%

Areas monthly results: North-East +10,6%, North-West +5,0%, Center +15,9%, South +5,6% and Islands +2,7%, comparing June 2023 to June 2022

Customer segments: Retail +10,1%, Fleet +52,9% and Business +21,9% June 2023 YTD vs June 2022 YTD

Brands: considering YTD results, among the **Top 15 by volume** only Fiat and Citroen decreased (-5,0% and -7,8%); all the other brands registered an increase, the highest for Renault (+43,3%)

Premium brands:** Audi, BMW and Mercedes-Benz registered an increase in June 2023 compared to June 2022 both monthly and YTD. In June '23 Audi +48,2%, BMW +29,5% and Mercedes-Benz +4,7% vs June '22; YTD Audi +38,6%, BMW 22,8% and Mercedes-Benz +17,4% vs the same period of 2022



01. Europe

- | Market overview
- | New car registrations by brands

02. Italy

03. Quarterly special topic CO2 emission trend

04. New car models launches in Italy

05. Commercial & Industrial Vehicles

06. News on key industry trends

Europe | Market Overview

Top 10 European Markets* – June 2023

European Markets*
new car registrations

2022

1.066.693

2023

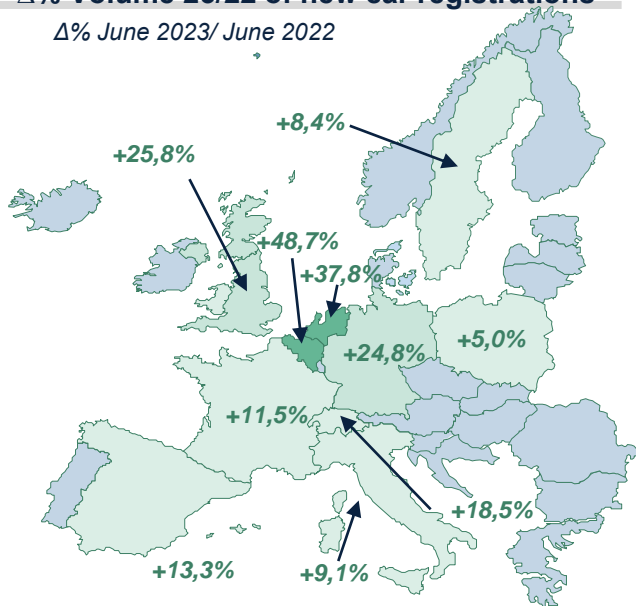
1.265.678

+18,7%



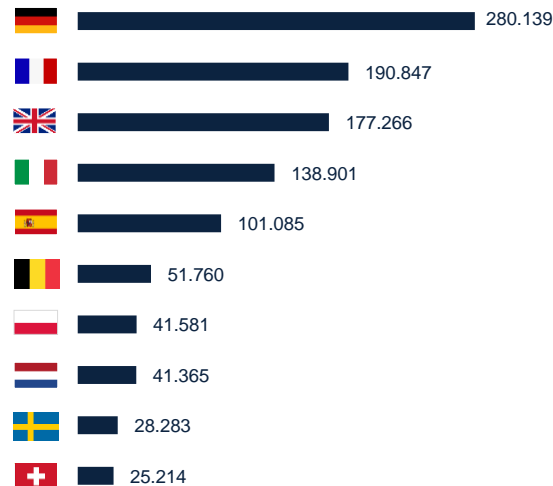
Δ% Volume 23/22 of new car registrations

Δ% June 2023/ June 2022



Number of EU new car registrations 2023

New car registration June 2023



Highlights

- The European market (EU+UK+EFTA) **registrations** increased from 1.066.693 in June 2022 to 1.265.678 cars in June 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 (+48,7%)
 - Netherlands (+37,8%)
 - United Kingdom (+25,8%)

Europe | Market Overview

Top 10 European Markets* – June 2023 YTD

European Markets*
new car registrations

2022
2023

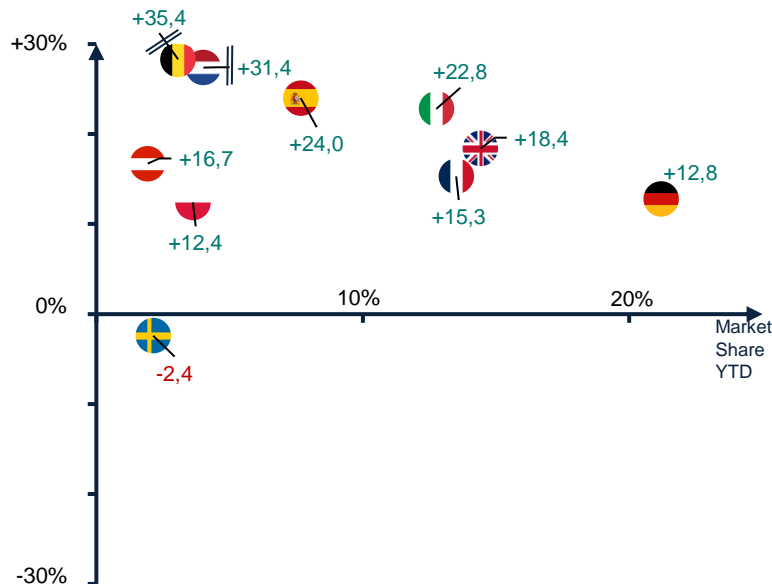
5.601.386
6.588.938

+17,6%



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

Δ % Volume June 23/22



| # | Country | MS June 2023 YTD | Δ VS 2022 | Sales Volume June 2023 YTD |
|----|---------|------------------|-----------|----------------------------|
| 1 | GER | 21,2% | +12,8% | 1.396.870 |
| 2 | UK | 14,4% | +18,4% | 949.720 |
| 3 | FRA | 13,5% | +15,3% | 889.776 |
| 4 | ITA | 12,8% | +22,8% | 840.750 |
| 5 | SPA | 7,7% | +24,0% | 505.421 |
| 6 | BEL | 4,0% | +35,4% | 264.475 |
| 7 | POL | 3,6% | +12,4% | 238.672 |
| 8 | NET | 3,1% | +31,3% | 201.792 |
| 9 | SWE | 2,1% | -2,4% | 140.663 |
| 10 | AT | 1,9% | +16,7% | 126.690 |



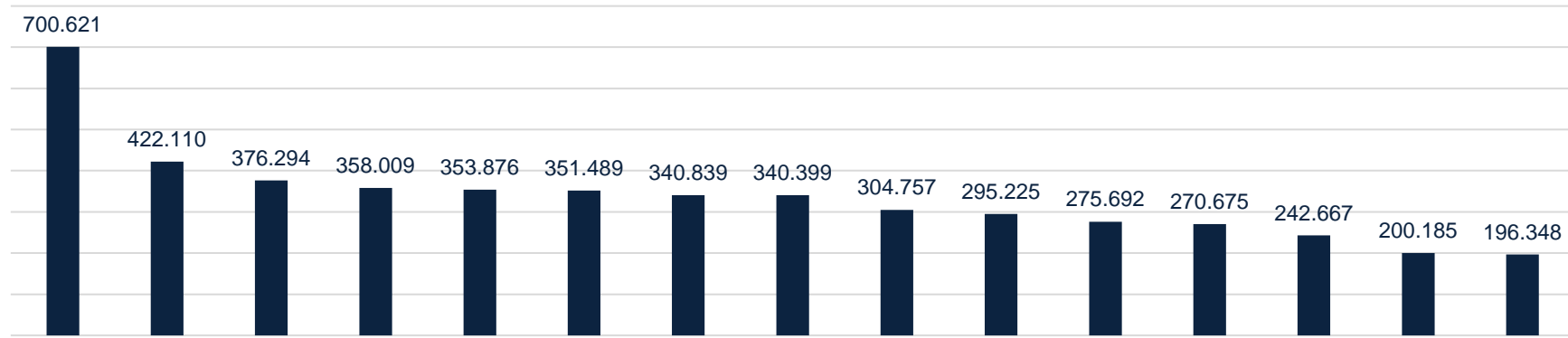
Highlights

- Considering YTD results, **28 countries out of 31 increased in June 2023 YTD** compared to June 2022 YTD, with most significant results for **Croatia** (+46,2%), **Portugal** (+45,4%) and **Belgium** (+35,4%). Only 4 countries decreased and just Sweden in the top 10 for registration (-2,4%)

Europe | New car registrations by brand



Top 15 – June 2023 YTD



| | | | | | | | | | | | | | | | |
|---------------------|--------|--------|--------|--------|--------|--------|---------|--------|---------|--------|--------|---------|--------|---------|---------|
| Δ Vol. 23/22 | +23,2% | +10,8% | +26,1% | +7,4% | +9,6% | +19,5% | +31,3% | +8,2% | +3,8% | +30,1% | +6,6% | +2,7% | +6,3% | -4,2% | -0,6% |
| MS '22 | 10,6% | 6,4% | 5,7% | 5,4% | 5,4% | 5,3% | 5,2% | 5,2% | 4,6% | 4,5% | 4,2% | 4,1% | 3,7% | 3,0% | 3,0% |
| Δ MS 23/22 | +4,95% | -5,88% | +7,55% | -8,47% | -6,90% | +0,00% | +13,04% | -7,14% | -11,54% | +9,76% | -8,70% | -12,77% | -9,76% | -18,92% | -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
- | Used Cars Market Trend

03. Quarterly special topic CO2 Emission Trend

04. New car models launches in Italy

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Italian Market – Variation of new car registrations 2023 vs 2022

June 2023 Highlights

June 2023 confirmed the positive trend of 2023 but down sharply from the previous months of 2023: **+9,2%** compared to June 2022.

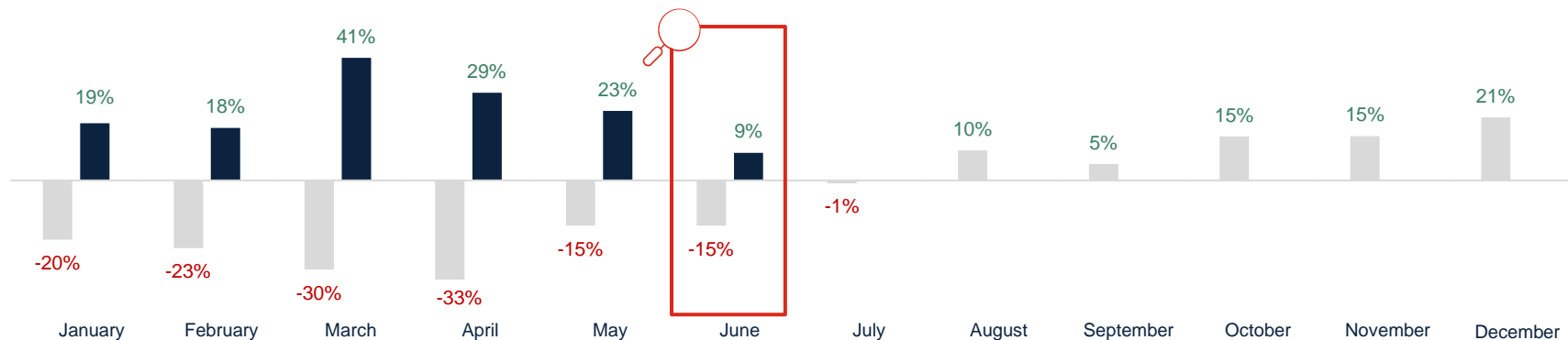
The last month of the first half of the year brings new registrations in **2023 YTD** to 841.343, **+23,0%** compared to the first semester of 2022, although pre-pandemic figures are far behind, -22,9% and 242.000 fewer registrations compared to June 2019 YTD.

In June, **the Market Share dropped for all fuel types except EVs**, whose growth is also due to improved product availability; however, this trend is mainly driven by **HEVs** (+5,7 p.p.), while **BEVs** (-0,4 p.p.) and **PHEVs** (-0,1 p.p.), decreased.

All **sales channels** recorded a **double-digit growth, always driven by fleet** (particularly LTR).

June 2023 saw a decrease in the **YTD Market Share** for **segment A and B**, with the former registering lower volumes compared to the same month last year and the latter recording growth although less than the other segments.

Renault, Jeep and Audi confirmed the **highest increase on a YTD perspective**, in general 6 brands among the top 15 by volume registered an increase greater than the Italian average YTD.



■ 2021/2022 ■ 2022/2023

Italy | Market Overview

Italian Market – June 2023 vs June 2022

Italy New Car Registrations

2023
2022

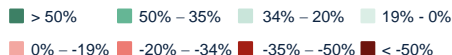
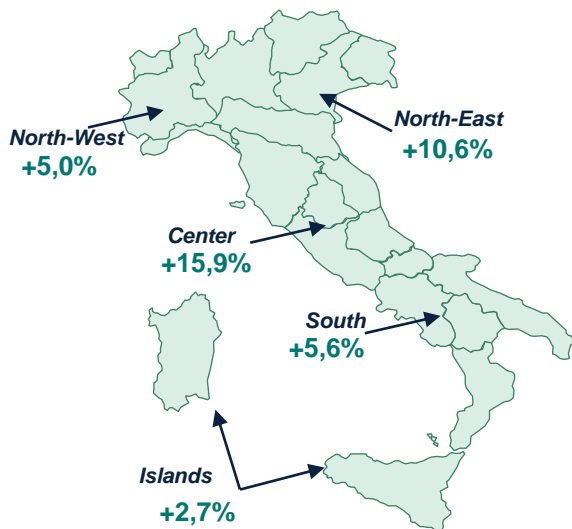
138.927
127.232

9,2%



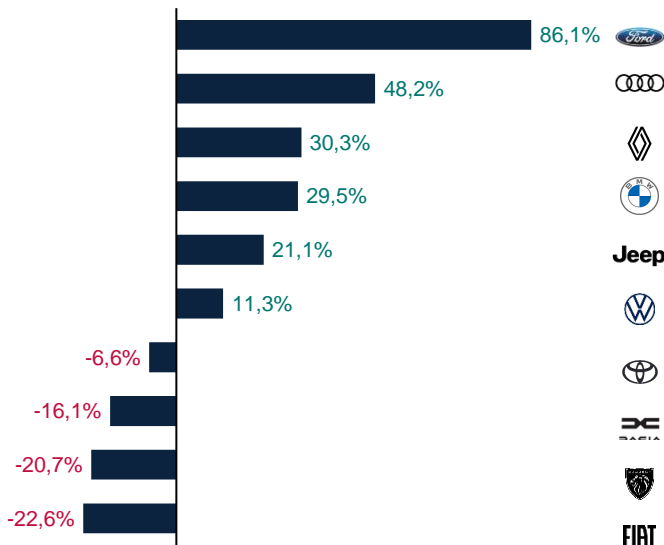
Δ% Volume 23/22 of New Car Registrations

Δ% June 2023/ June 2022



Growth of Top 10 Brands by Volumes

Δ% June 2023/ June 2022



! Highlights

- In **June 2023**, the Italian Market confirmed the positive result of May 2023 (+23,1%), although to a lesser extent, with an increase of +9,2% compared to June 2022
- The highest growth** for **Ford** (+86,1%), **Audi** (+48,2%) and **Renault** (+30,3%).
- Considering the top 10 brands by volume, those decreasing are **Toyota** (-6,6%), **Dacia** (-16,1%), **Peugeot** (-20,7%) and **Fiat** (-22,6%)
- Although all regions in the **Italian Market** experienced an increase, **Central** and **Northern-East** regions grew at a significantly higher rate than the **Northern-West**, **South** and **Islands**

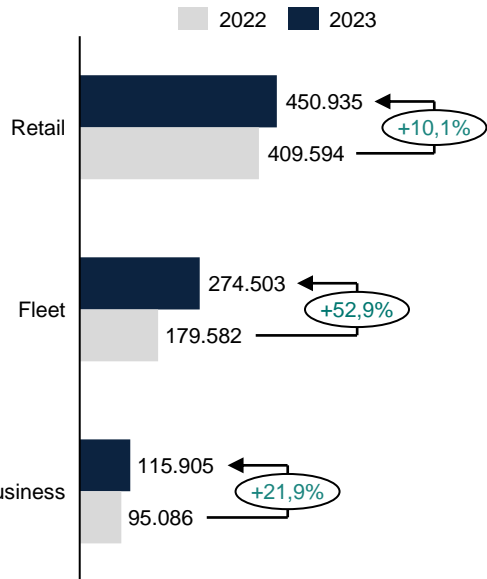
Italy | Market Overview

Italian Market – June 2023 YTD vs June 2022 YTD

| Italy New Car Registrations (YTD) | 2023 | 2022 | % Change |
|-----------------------------------|---------|---------|----------|
| | 841.343 | 684.262 | +23,0% |

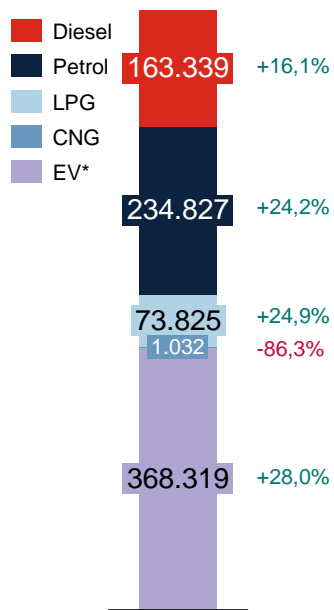
Analysis by “Customer Segment”

Registration YTD '23/'22



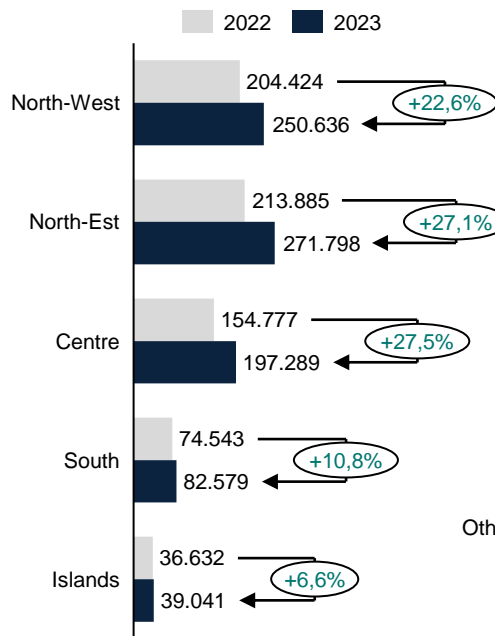
Analysis by “Fuel Type”

Registration YTD '23



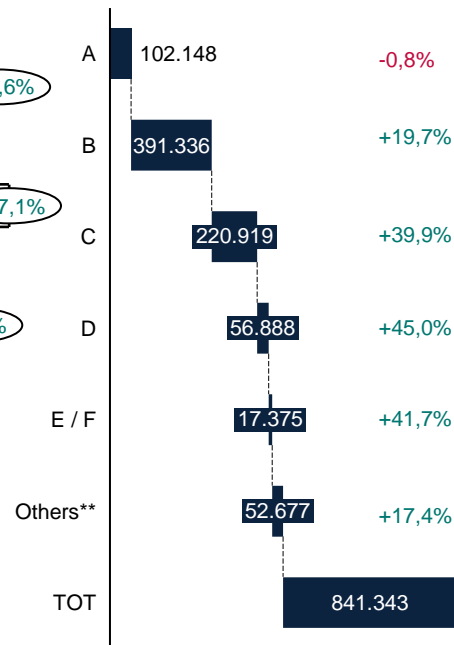
Analysis by “Geographical Area”

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

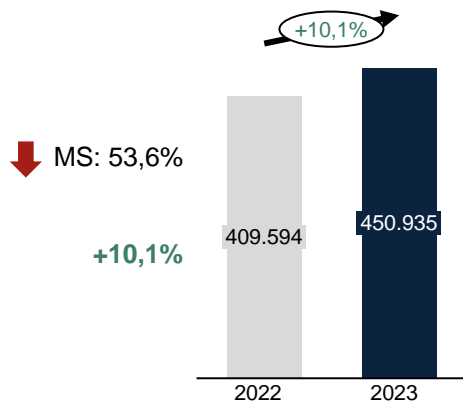
Italy | Market Highlights

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

Italy New Car Registrations (YTD)

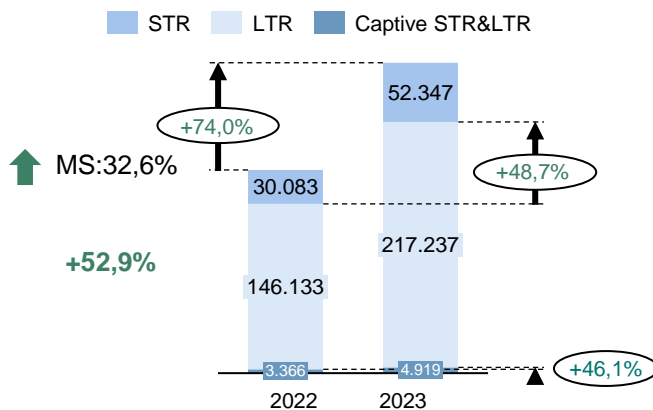
| | | | |
|------|---------|-------|--|
| 2023 | 841.343 | 23,0% | |
| 2022 | 684.262 | | |

Retail (Private Customers)



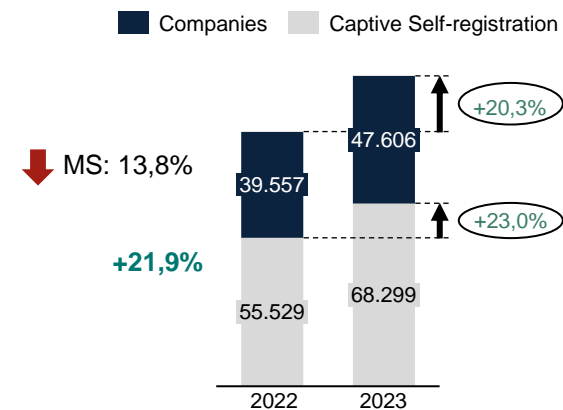
- Compared to **June 2022 YTD**, in **2023** the **Retail** segment registered an increase of +10,1% (41.341 additional units sold) but also the largest drop in terms of Market Share -6,3 p.p. (53,6% in June 2023 vs. 59,9% in June 2022), continuing to lose share to the Fleet segment

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



- Fleet segment** confirmed in June YTD 2023 the positive result (+52,9%) already recorded in May, led mainly by the **LTR** cluster. Among the three channels, Fleet is the only one that showed an increase in its Market Share (+6,4 p.p.), led by **STR** (+1,8 p.p., 6,2% in June 2023 YTD vs 4,4% in June 2022 YTD) and **LTR** (+4,4 p.p., 25,8% in June 2023 vs 21,4% in June 2022)

Business (Company registrations**)



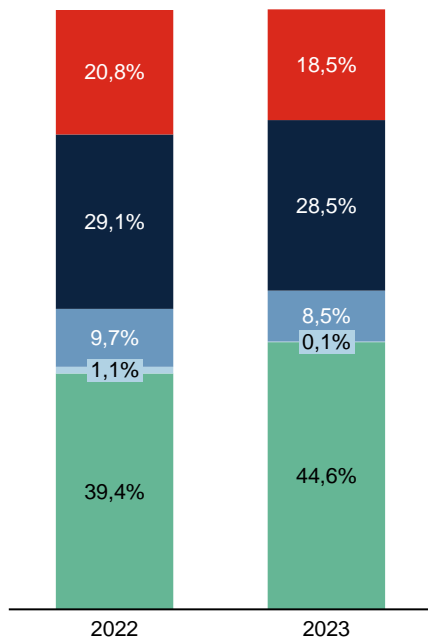
- The growth of the **Business segment** registrations in **June 2023** is linked both to the increase of **Companies registrations** (+20,3% or 8.049 additional units sold), and **Captive self-registrations** (+20,3% or 12.770 units sold).

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



“Fuel Type” mix evolution (Market Share)

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



| | HEV | PHEV | BEV |
|-------------------------------------|-----------|-----------|-----------|
| MS June '22 | 29,1% | 5,5% | 4,8% |
| MS June '23 | 34,8% | 5,4% | 4,4% |
| MS Delta June '23 vs. '22 | +5,7 p.p. | -0,1 p.p. | -0,4 p.p. |

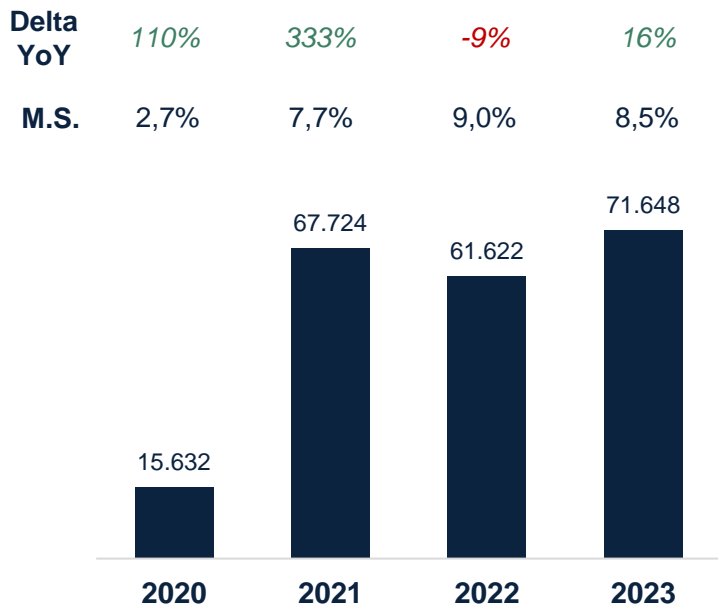
- In June 2023 **EV** showed an increase in their Market Share (+5,2 p.p.) compared to 2022
- All other fuel types registered a decrease, most notably for **Diesel** (-2,3 p.p.)
- In terms of Market Share, **Plug-in Electric Vehicles** (PHEVs) and **Battery Electric Vehicles** (BEVs) decreased (-0,1 p.p. and -0,4 p.p.), while **Hybrid Electric Vehicles** (HEVs) increased (+5,7 p.p.)

Italy | New car registrations by fuel type

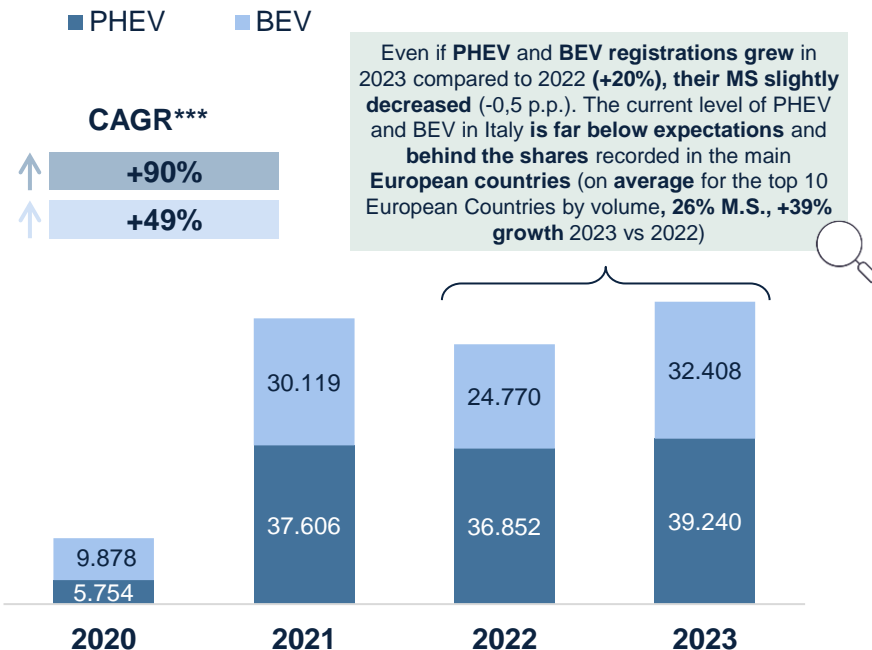


New car registrations of Hybrid vs Pure Electric vehicles

PHEV and BEV Registrations Trend June '23 YTD



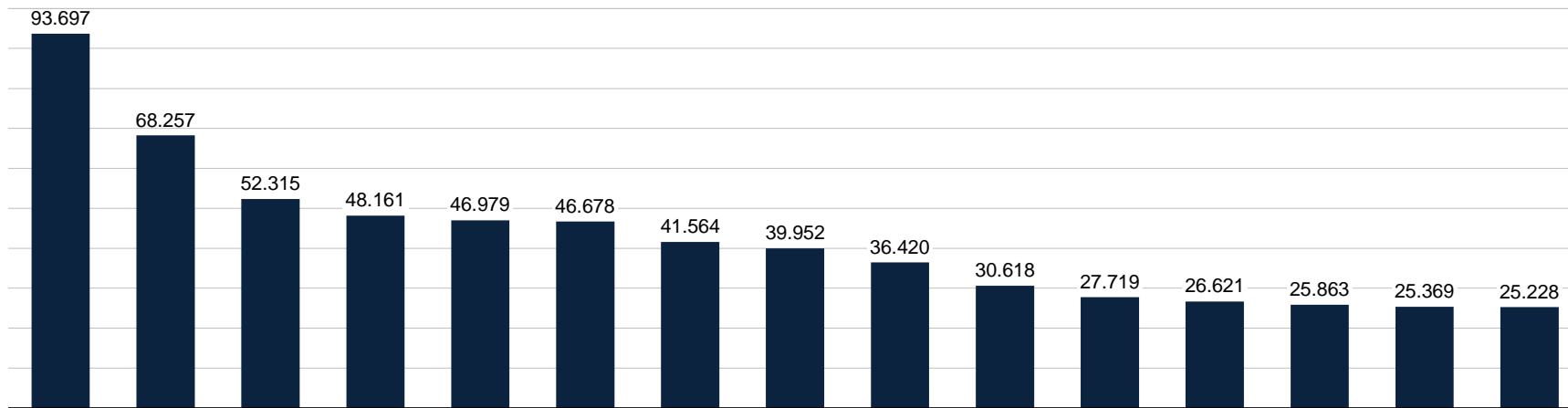
PHEV* and BEV** Vehicles Trend June '23 YTD



Italy | New car registrations by brand



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



| | | | | | | | | | | | | | | | |
|--------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Δ Vol. 23/22 | -5,02% | +26,63% | +16,34% | +18,90% | +16,24% | +24,70% | +43,26% | +39,78% | +38,56% | +22,84% | -7,78% | +2,32% | +17,35% | +24,84% | +16,59% |
| M.S. '23 | 11,14% | 8,11% | 6,22% | 5,72% | 5,58% | 5,55% | 4,94% | 4,75% | 4,33% | 3,64% | 3,29% | 3,16% | 3,07% | 3,02% | 3,00% |
| Δ M.S. 23/22 | -22,75% | +2,92% | -5,33% | -3,38% | -5,58% | +1,46% | +16,51% | +13,64% | +12,76% | +0,00% | -25,06% | -16,84% | -4,66% | +1,68% | -5,06% |

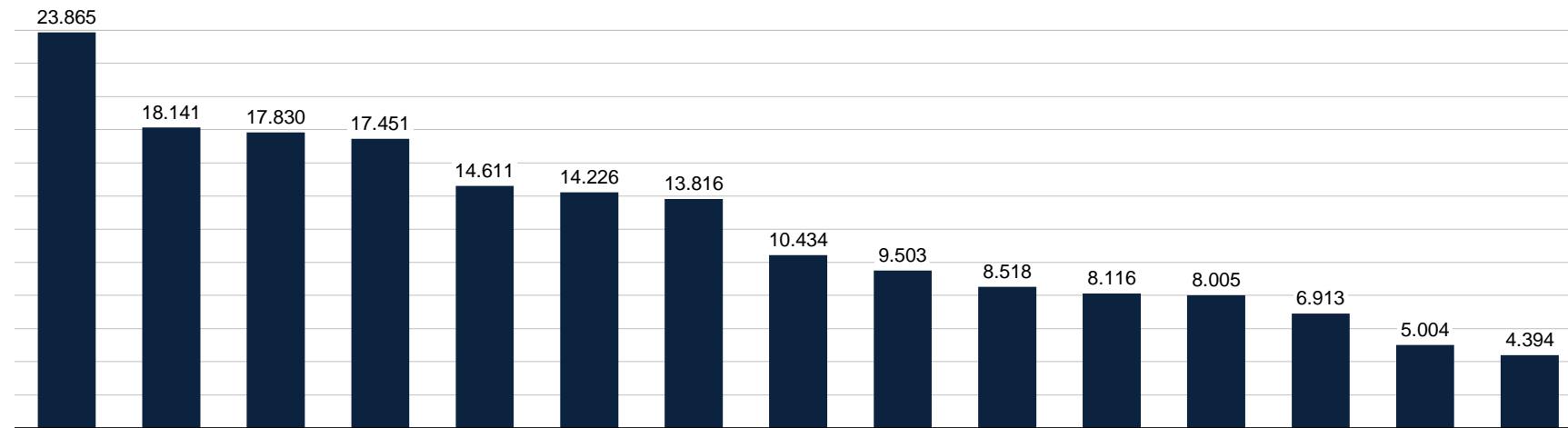


Source: UNRAE

Italy | New car registrations by brand



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



| Brand | Δ Vol. 23/22 |
|------------|--------------|
| LANCIA | +11,08% |
| SUZUKI | +64,60% |
| NISSAN | +26,88% |
| KIA | +41,41% |
| ALFA ROMEO | +157,10% |
| MG | +435,62% |
| dr | +94,45% |
| MINI | +28,97% |
| VOLVO | +40,47% |
| TESLA | +233,91% |
| MAZDA | +73,12% |
| CUPRA | +33,53% |
| SEAT | -12,75% |
| LAND ROVER | +25,98% |
| X | +36,88% |

| Brand | M.S. '23 |
|------------|----------|
| LANCIA | 2,84% |
| SUZUKI | 2,16% |
| NISSAN | 2,12% |
| KIA | 2,07% |
| ALFA ROMEO | 1,74% |
| MG | 1,69% |
| dr | 1,64% |
| MINI | 1,24% |
| VOLVO | 1,13% |
| TESLA | 1,01% |
| MAZDA | 0,96% |
| CUPRA | 0,95% |
| SEAT | 0,82% |
| LAND ROVER | 0,59% |
| X | 0,52% |

| Brand | Δ M.S. 23/22 |
|------------|--------------|
| LANCIA | -9,55% |
| SUZUKI | +34,16% |
| NISSAN | +3,41% |
| KIA | +15,00% |
| ALFA ROMEO | +109,64% |
| MG | +333,33% |
| dr | +57,69% |
| MINI | +5,08% |
| VOLVO | +14,14% |
| TESLA | +172,97% |
| MAZDA | +39,13% |
| CUPRA | +7,95% |
| SEAT | -29,31% |
| LAND ROVER | +1,72% |
| X | +10,64% |

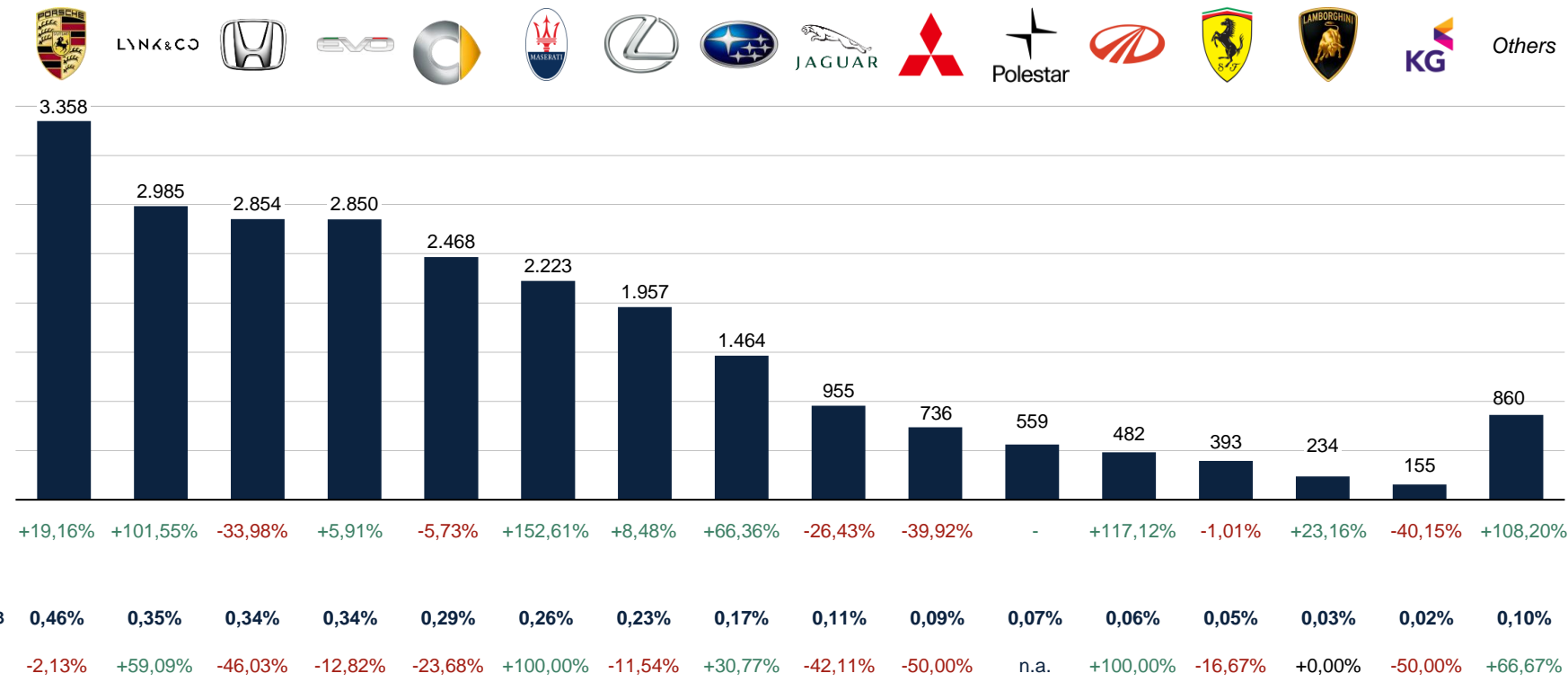


Source: UNRAE

Italy | New car registrations by brand



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



Source: UNRAE

Italy | New car registrations by group



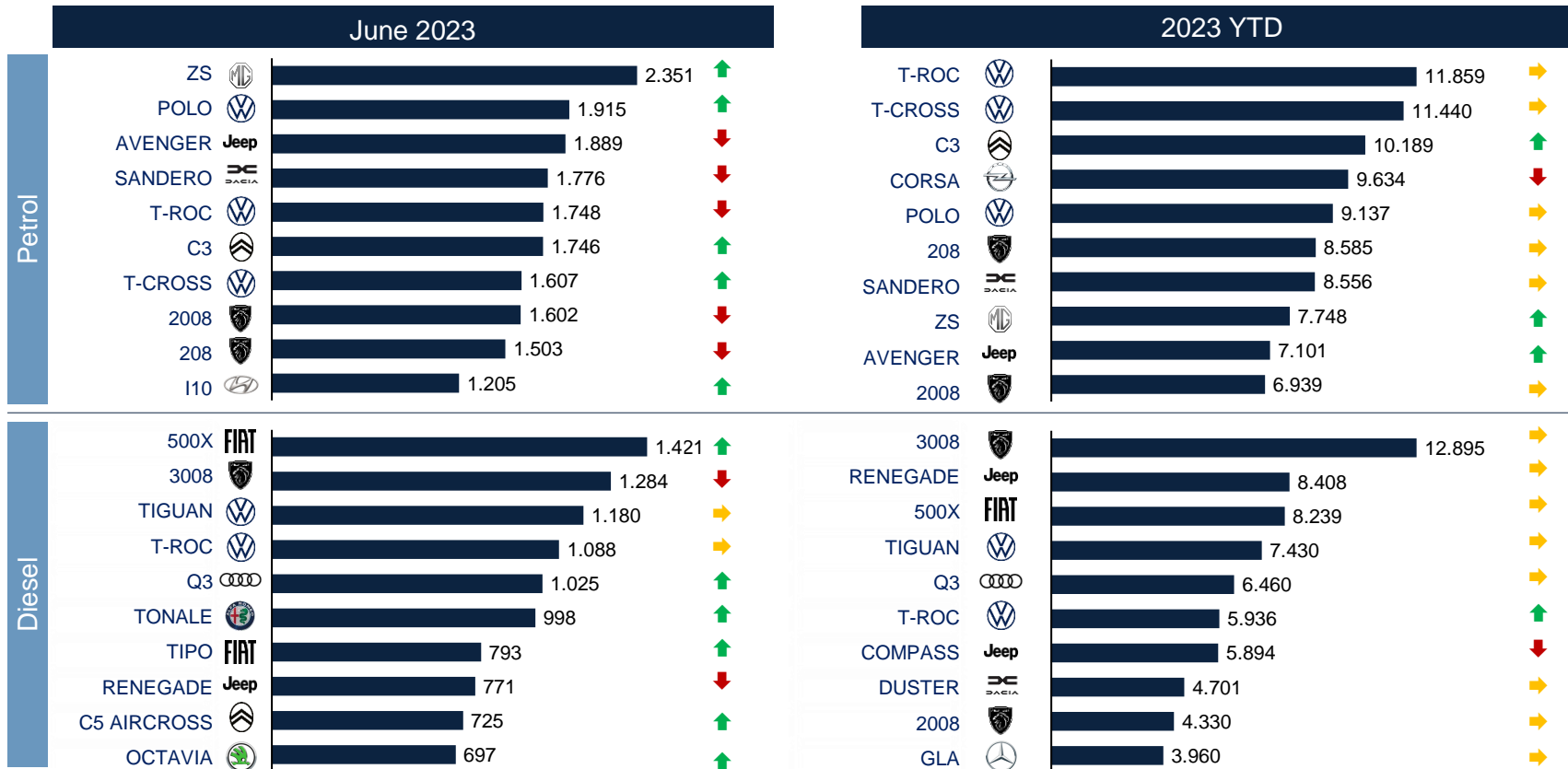
New car registrations by group – Top 15 – June 2023 YTD

| | Group | Brand | Volume | Δ% Volume '23 vs '22 | Market Share (%) |
|----------------------|---------------|-------|---------|----------------------|------------------|
| 1 | Stellantis | | 281.243 | 10,3% | 33,4% |
| 2 | Volkswagen | | 137.280 | 28,7% | 16,3% |
| 3 | Renault | | 88.242 | 32,8% | 10,5% |
| 4 | Toyota | | 54.272 | 16,0% | 6,5% |
| 5 | Ford | | 46.979 | 16,2% | 5,6% |
| <i>Top 5: 72,3%</i> | | | | | |
| 6 | BMW | | 41.052 | 24,3% | 4,9% |
| 7 | Mercedes-Benz | | 28.331 | 14,9% | 3,4% |
| 8 | Hyundai | | 25.369 | 24,8% | 3,0% |
| 9 | Kia | | 25.228 | 16,6% | 3,0% |
| 10 | Suzuki | | 18.141 | 64,6% | 2,2% |
| <i>Top 10: 88,8%</i> | | | | | |
| 11 | Nissan Group | | 17.830 | 26,9% | 2,1% |
| 12 | DR Group | | 16.666 | 70,1% | 2,0% |
| 13 | MG | | 14.226 | 435,6% | 1,7% |
| 14 | Volvo | | 9.503 | 40,5% | 1,1% |
| 15 | Tesla | | 8.518 | 233,9% | 1,0% |

Italy | New car registrations by fuel type



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



Source: UNRAE

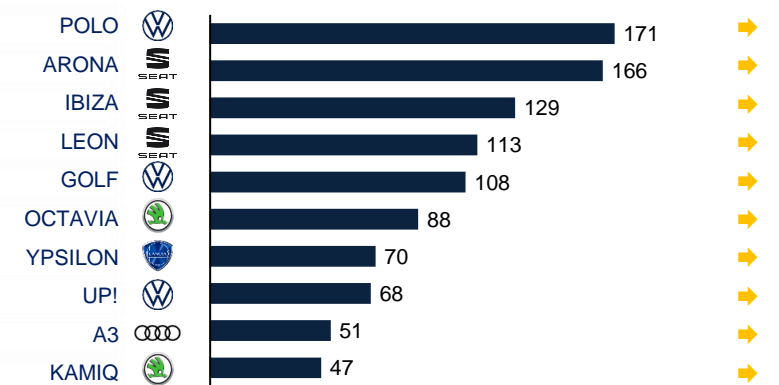
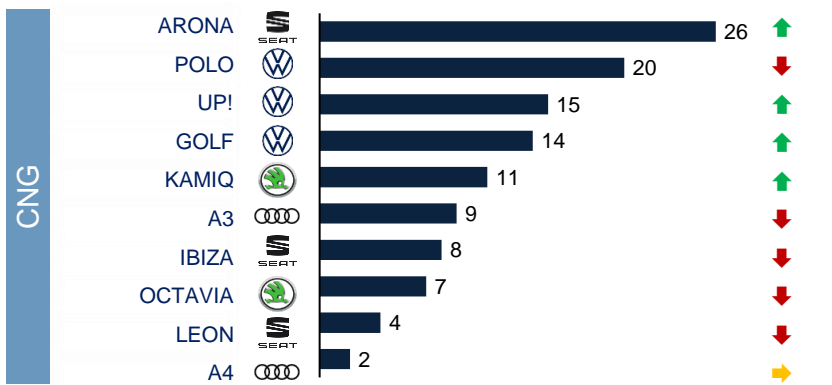
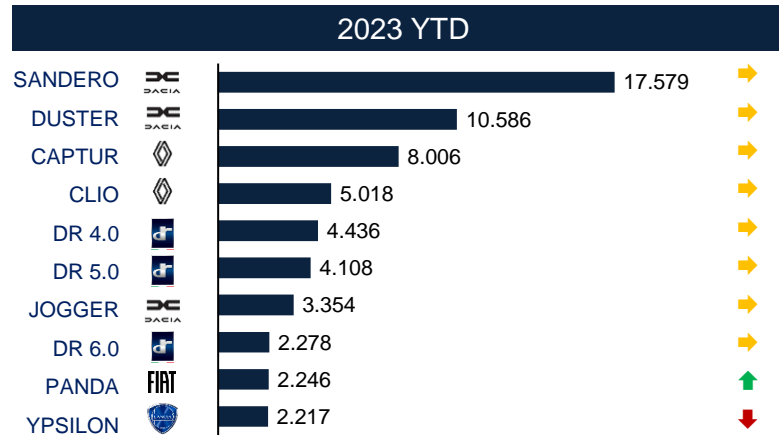
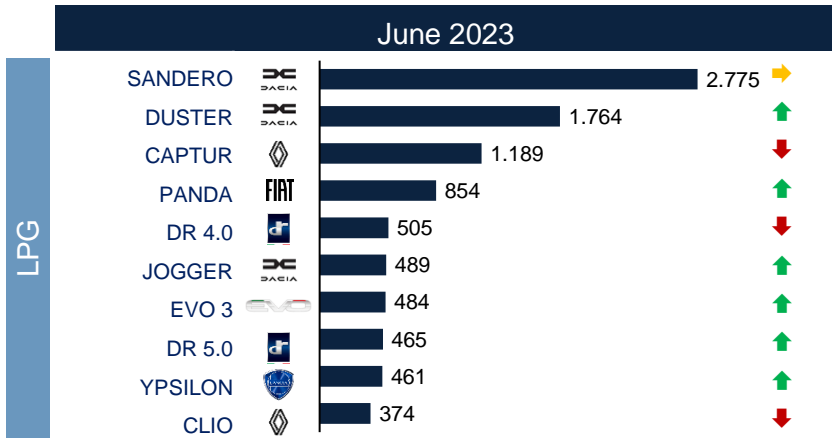


Ranking variation compared to previous period

Italy | New car registrations by fuel type



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



Source: UNRAE

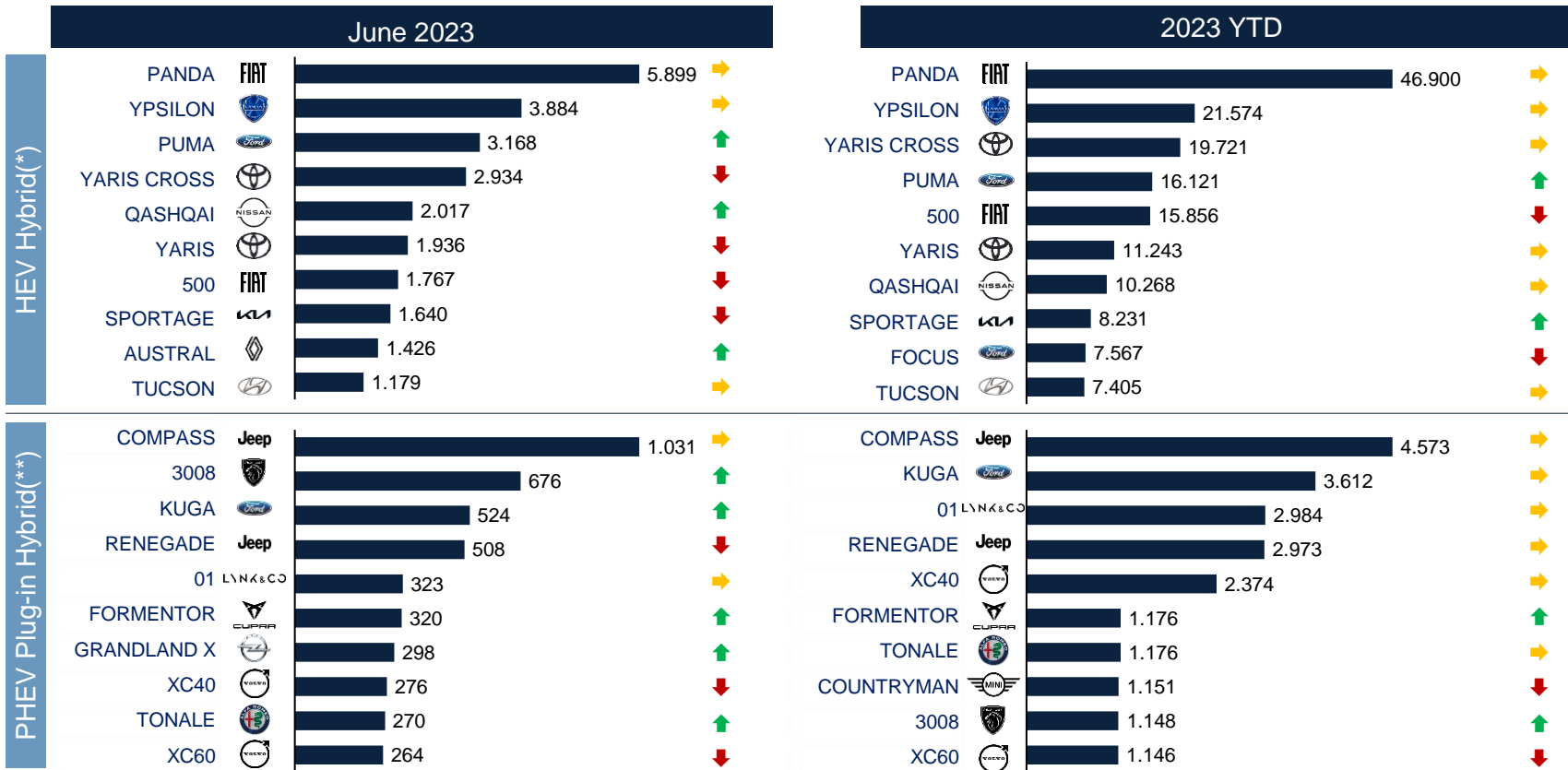


Ranking variation compared to previous period

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)

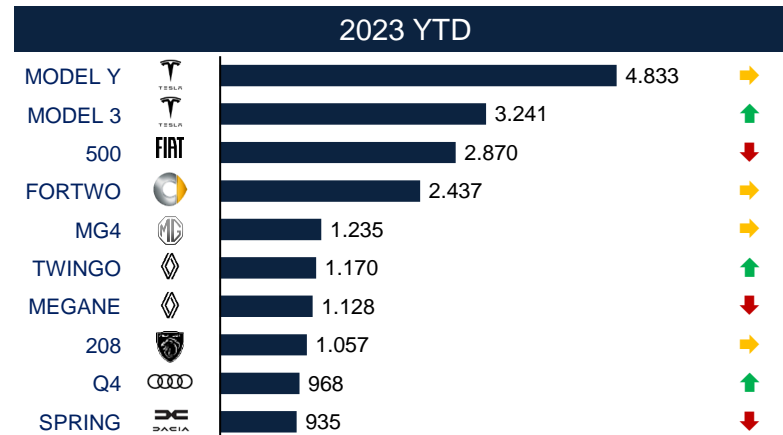
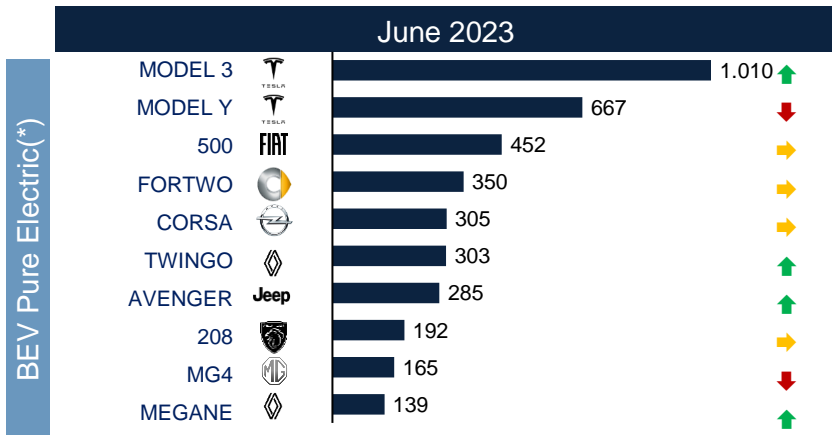


Ranking variation compared to previous period

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»



-1,3 p.p.

C
«Medium»



3,1 p.p.

D
«Executive»



0,9 p.p.

E/F
«Luxury &
Ultra Luxury»



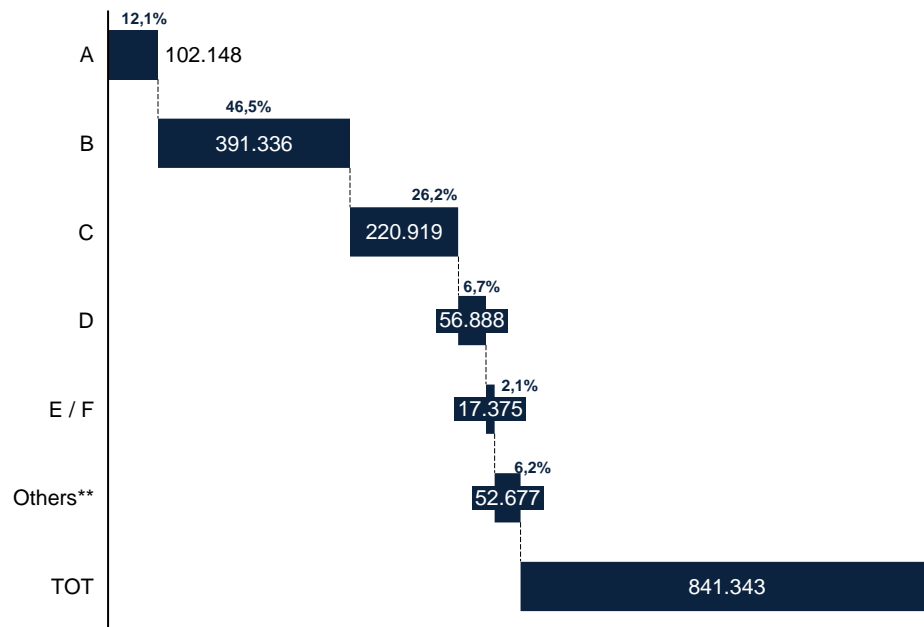
0,3 p.p.

Others
«Station wagon,
MPV, Sportive»



-0,4 p.p.

Market Share and Volume**



Italy | New car registrations by segment

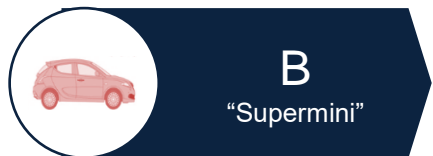
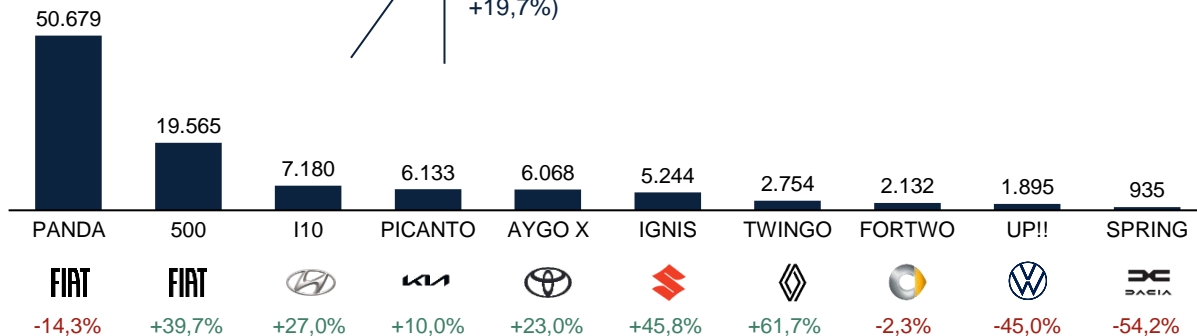


Segment A and Segment B – Top 10 – June '23 YTD

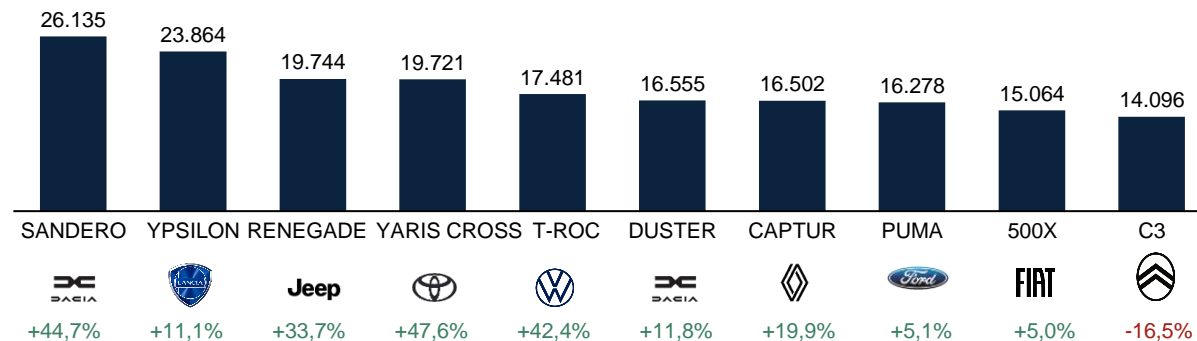
In terms of **MS**, in June 2023 YTD both **Segment A** and **Segment B** registered a decrease (-2,9 p.p. and -1,3 p.p.) vs June 2022. Considering the volumes, in June 2023 **Segment A** registered a decrease while **Segment B** increased vs. June 2022 (-0,8% and +19,7%)



Δ Vol. %
23/22 YTD



Δ Vol. %
23/22 YTD



Italy | New car registrations by segment

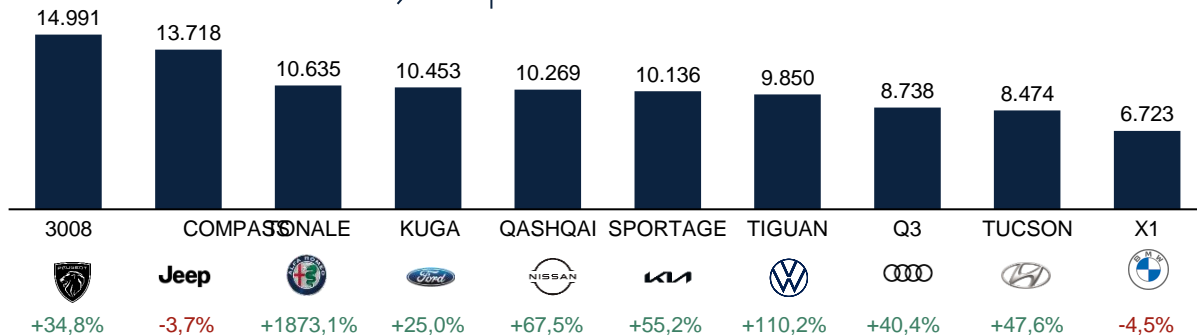
Segment C and Segment D – Top 10 – June '23 YTD



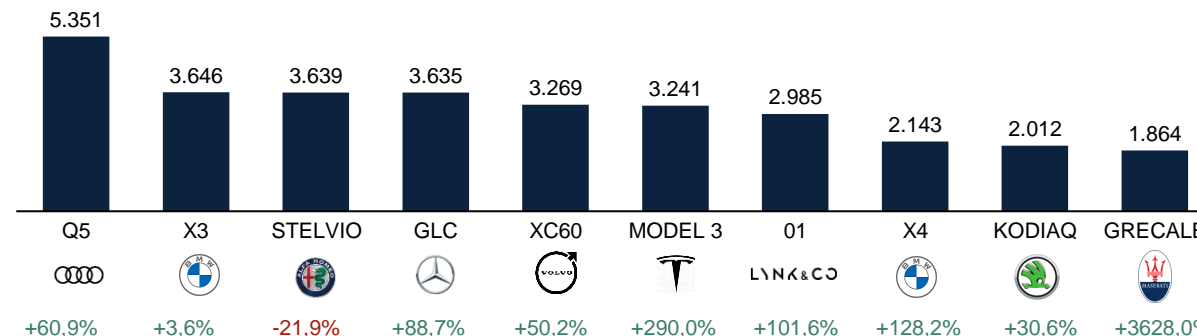
In terms of **MS**, in June 2023 YTD both **Segment C** and **Segment D** registered an increase (+3,1 p.p. and +0,9 p.p.) vs June 2022. Considering the volumes, in June 2023 YTD both **Segment C** and **Segment D** increased vs. June 2022 (+39,9% and +45,0%)



Δ Vol. %
23/22 YTD



Δ Vol. %
23/22 YTD



Italy | New car registrations by segment

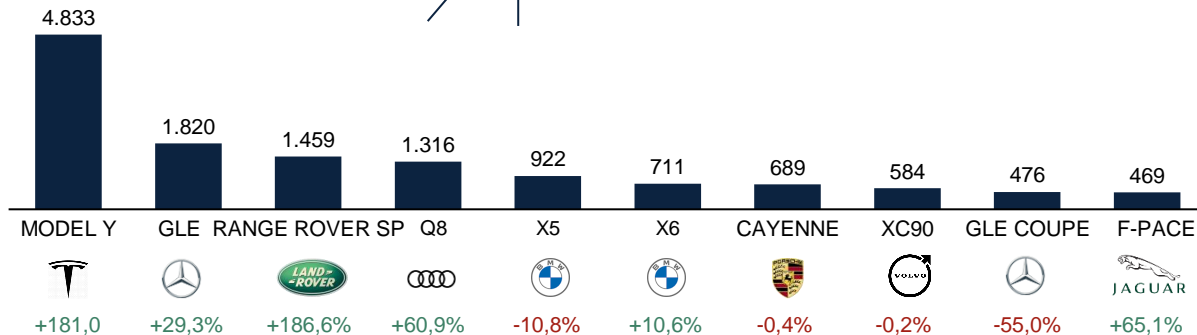


Segment E/F and Others – Top 10* – June '23 YTD

In terms of **MS**, in June 2023 YTD, **Segment E/F** registered an increase (+0,3 p.p.) while **Others** decreased (-0,4 p.p.) vs June 2022. In terms of volumes, in June 2023 YTD both **Segment E/F** and **Others** increased (+41,7% and +17,4%) vs. June 2022

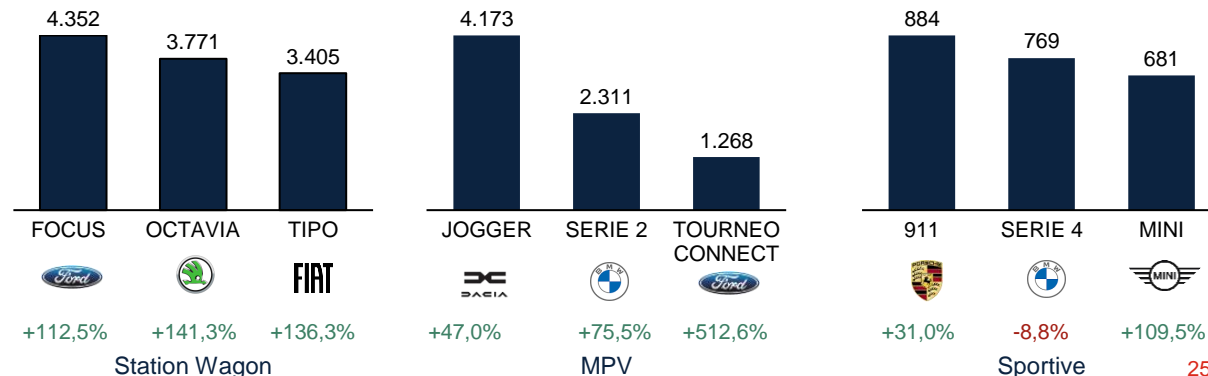
E/F
"Luxury & Extra Luxury"

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

Italy | Market Overview

Italian Market – Used Cars Market Trend

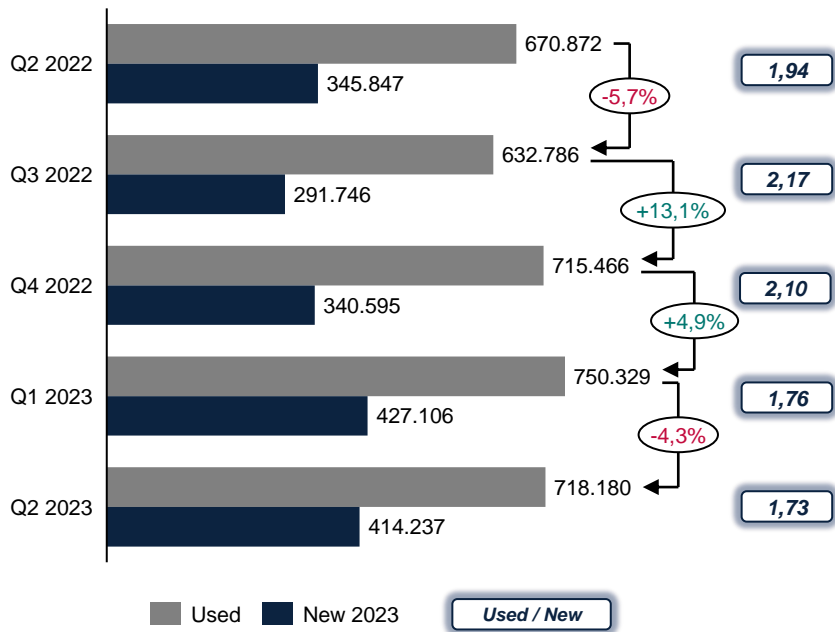
Italy Transfer of Ownership YTD

Used
New

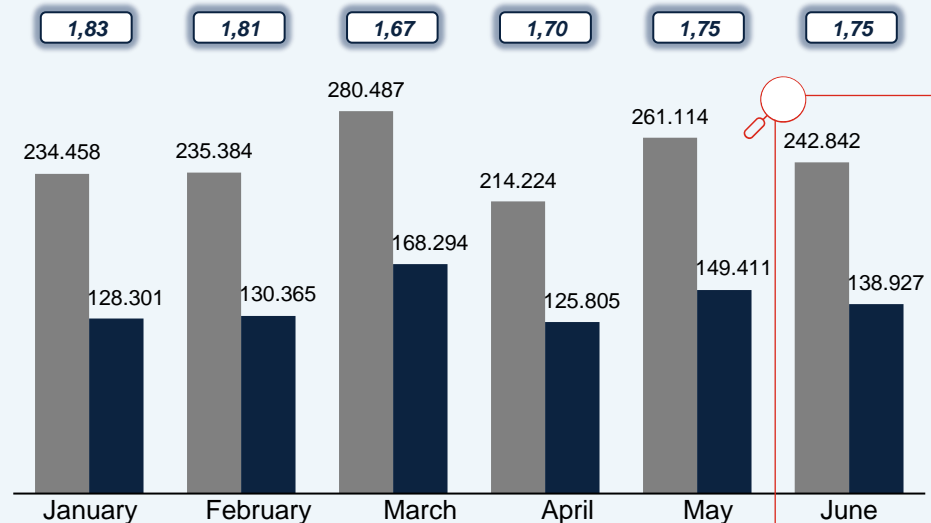


The used-to-new ratio in **June 2023 YTD** is equal to **1,75**, below previous years levels (2,03 in 2022; 2,02 in 2021; 1,91 in 2020); **this is mainly due to an increase in new registrations compared to previous years.** Looking at a one-year window, comparing 2Q 2023 with 2Q 2022, the used-to-new ratio also decreased from 1,94 to 1,73.

In the first half of 2023, the used car market shown a quite similar trend to that of new cars: in months when new registrations increase compared to the previous months, transfers of ownership also increase.



Focus on first half of 2023



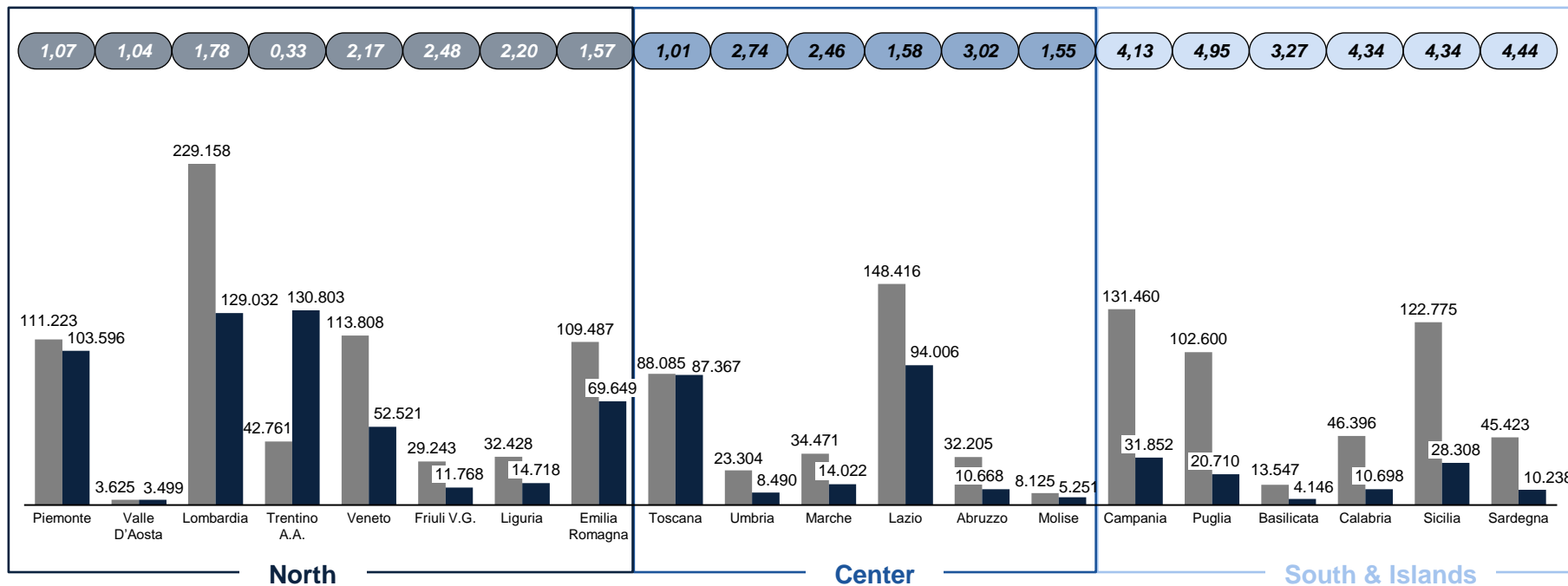
Italy | Market Overview

Italian Market – Geographical analysis of Used cars vs. New Registrations YTD

North 671.733
 Center 334.606
 South & Islands 462.201



Ratio Used / New for each Italian Region



Used New



Source: ACI



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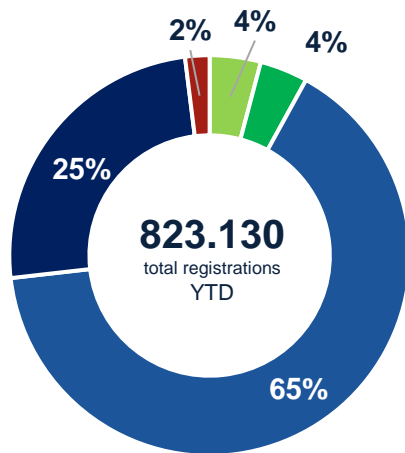
Italy | Registrations by CO2 emissions

Analysis of new car registrations in Italy | First half of 2023

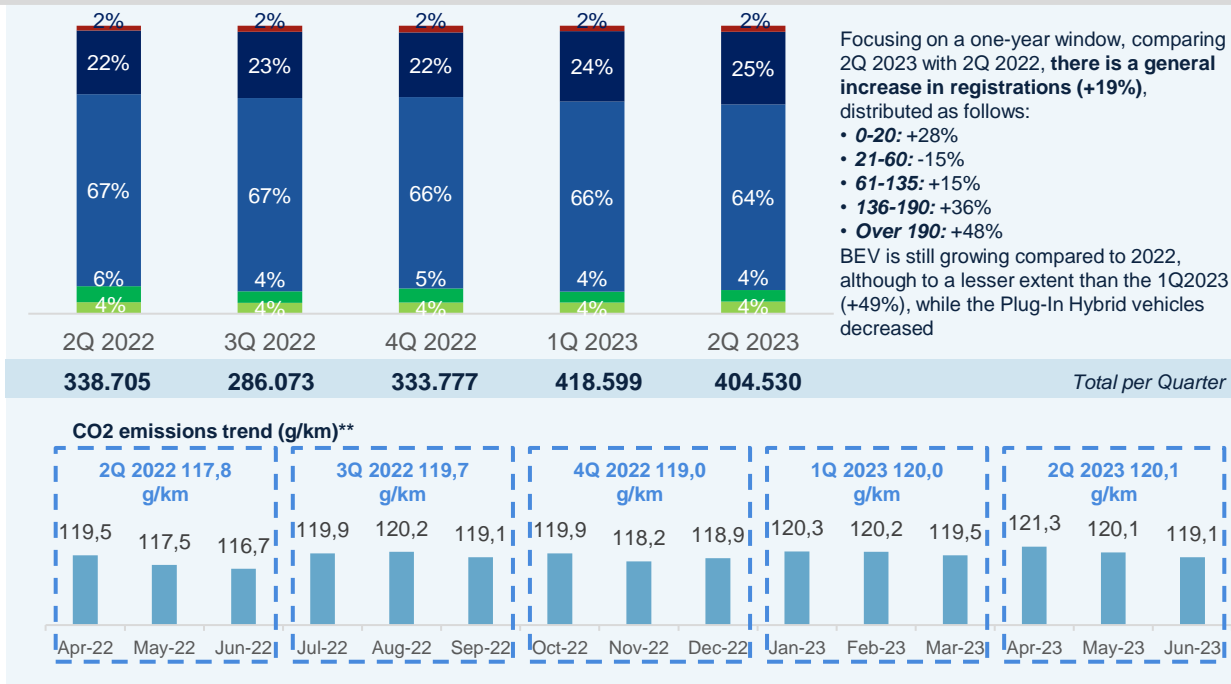


In the first half of 2023, **823.130** cars were registered* (+23% compared to the first half of 2022), only 8% **plug-in vehicles** (hybrids and full electric). Average emissions of registered vehicles increased compared to 2Q 2022 and to the two previous quarters. This is mainly due to the above-average growth of 136-190 cluster, only partially balanced by BEVs (which, however, slowed down compared to 1Q), while PHEVs declined in 2Q 2023 compared to the same period in 2022.

Registrations distribution by CO2 emissions for the first half of 2023*



■ 0-20 ■ 21-60 ■ 61-135 ■ 136-190 ■ Over 190



Focusing on a one-year window, comparing 2Q 2023 with 2Q 2022, **there is a general increase in registrations (+19%)**, distributed as follows:

- **0-20**: +28%
- **21-60**: -15%
- **61-135**: +15%
- **136-190**: +36%
- **Over 190**: +48%

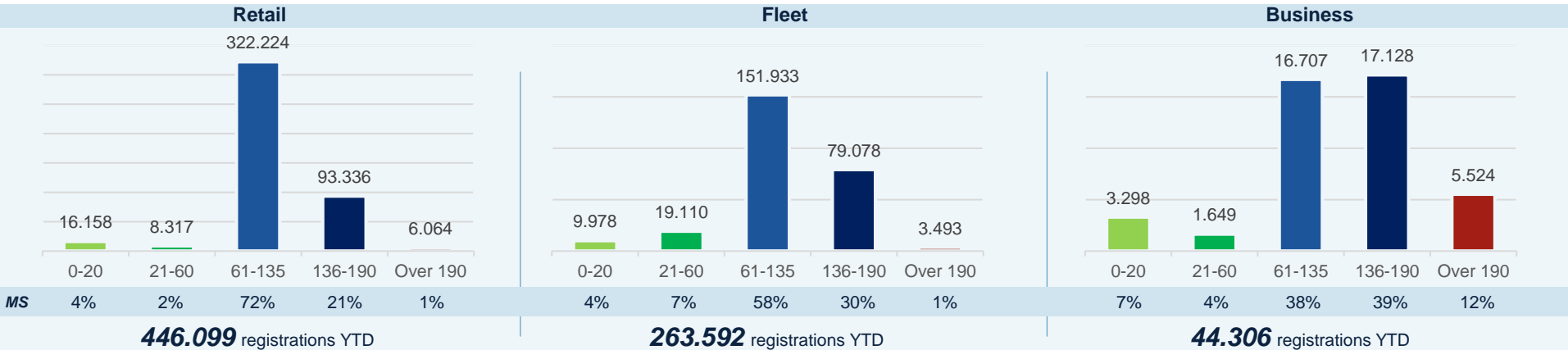
BEV is still growing compared to 2022, although to a lesser extent than the 1Q2023 (+49%), while the Plug-In Hybrid vehicles decreased

Italy | Registrations by CO2 emissions



Analysis of new car registrations in Italy by channel | First half of 2023

Focusing on the Retail, Fleet and Business segments, **753.997*** cars were registered in the first half of 2023; **the Fleet segment continue to contribute the most in terms of emissions**, with the largest number of “green” cars compared to total registrations. However, Retail and Fleet segments recorded in the 2Q 2023 an increase in registrations with high emissions (over 190) compared to the 1Q 2023.



Comparing the first half of 2023 with the same period in 2022, all clusters by emission grew, except for the 21-60, that registered a -6%.

The **most impressive results concern full electric vehicles** whose registrations rose from 9.841 in the first half of 2022 to 16.158 in the same period of 2023, with an increase of 64%

Comparing the first half of 2023 with the same period in 2022, all clusters increased.

The **highest results** in terms of registrations for ICE vehicles with emissions between 61 and 190 (61-135: +44%, 136-190: +98%).

Good growth also for the full electric vehicles with a +45% compared to 2022 (up from the 1Q 2023, +29%)

With respect to the first half of 2022, full electric vehicles registrations increased (+48%), while plug-in hybrid decreased (-29%).

ICE vehicles with emission >136 also increased (136-190: +35%, Over 190: +44%).



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New Car Models Launches in Italy

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

| | A | B | C | D | F | H | | | | |
|-----|----------------|-------------------------------|-------------------------|---|---------------------|----------------|--|----------------------|------------------|--------------|
| | | | | | | | | | | |
| 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 | | | X5, M2 | | | | | | | |
| Jul | | | M3CS, Serie 7 | | | 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 | | | | | | |
| Mar | | | | | | |
| Apr | | | | | | |
| May | | | | | | |
| Jun | | | | | | |
| Jul | | | | | | |
| Aug | | | | | | |
| Sep | | | | | | |
| 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 ✓ | | | | | | | | Touareg ✓ | |
| Jul | | e-308 sw, e-308 → | | | Elroq | #1 | | | | |
| Aug | | | Macan EV | Gran Austral | | | | BZ4x → | | |
| Sep | | | 911 Safari | | | | | | Tiguan | XC 20 |
| Oct | | 3008 Mild Hybrid | | Scenic E-Tech | | | Swift | | ID.3 GTX → | |
| Nov | | 5008 Mild Hybrid | | | | | | | ID.Aero | |
| Dec | | | 5 E-tech Elettric | | | | | Cybertruck | CH-R → | Golf |



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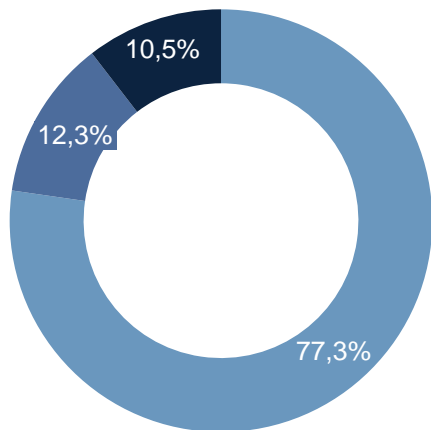
06. News on key industry trends



Commercial and Industrial Vehicles Highlights 2023

In **June 2023**, the **commercial and industrial vehicles Market** showed a **general growth** with a total of **22.080** new vehicles registered in the month (123.131 YTD). Both commercial and industrial vehicles registered increases in June 2023 compared to June 2022. Commercial vehicles segment ($\leq 3,5t$) recorded a +9,1%, while **light mass segment ($<16t$)** and **heavy mass segment ($\geq 16t$)** reported +13,0% and +14,4%, respectively.

Vehicles YTD distribution by category



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

123.131

Total registered vehicles
+ 10,1%
compared to 2022 registrations
(111.816)

Commercial
vehicles YTD

95.162 +9,1% *

Light mass
vehicles YTD

15.096 +13,0% *

Heavy mass
vehicles YTD

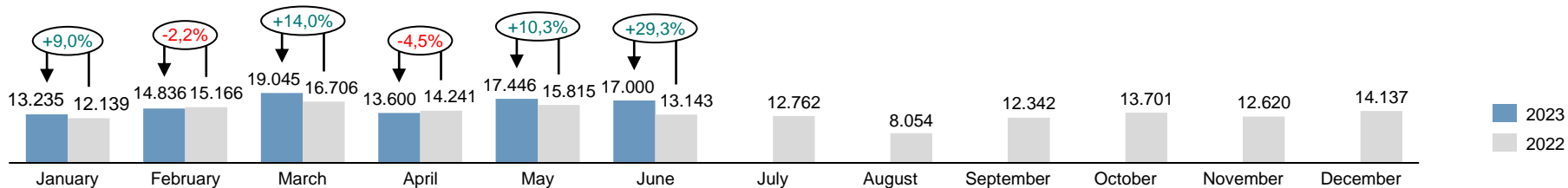
12.873 +14,4% *

Italy | New Vehicles registrations

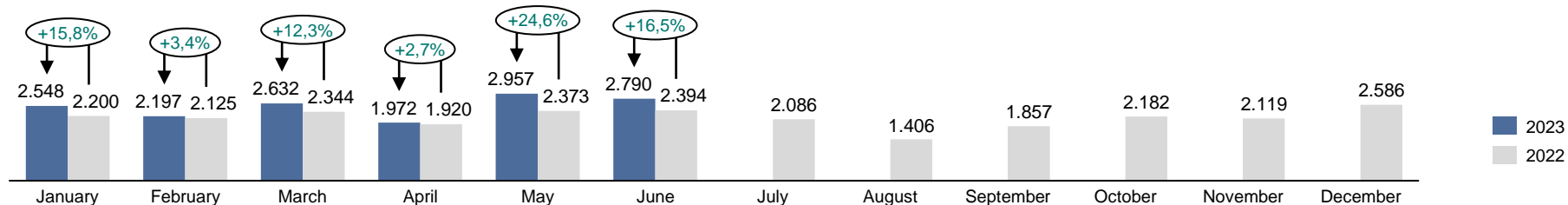


Italian Market - Commercial and Industrial vehicles Registration 2023 vs 2022 (2/2)

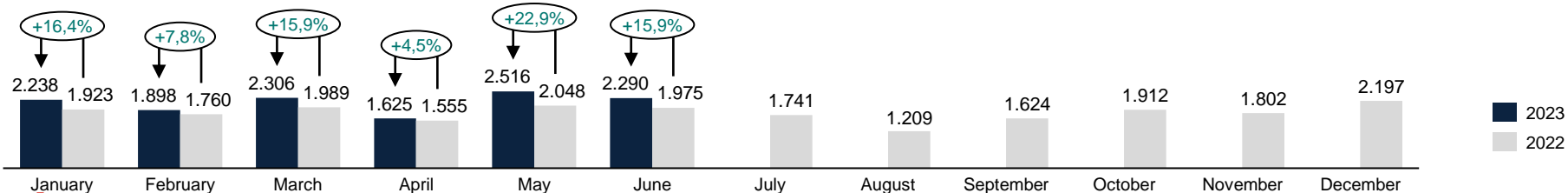
Commercial Vehicles ≤ 3,5t June 2023 YTD



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



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



Italy | New Vehicles registrations



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

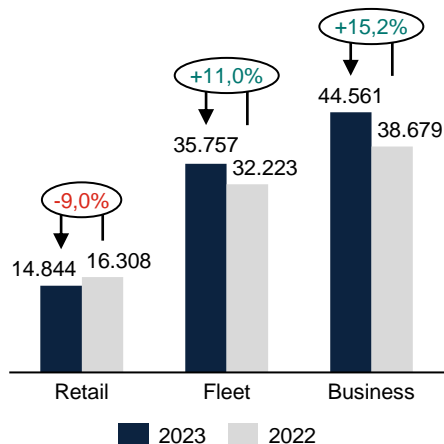
Commercial Vehicles January - June Analysis

In the first 6 months of **2023**, the **commercial vehicles** increased in new registrations (+9,1%), with a total of **95.162**, mainly driven by **Business** and **Fleet segments**, while **Retail** recorded a **decrease**.

Regarding the fuel type, significative increases for **LPG** (+15,2%), **Diesel** (+14,6%) and **EV** (+7,1%), while **Petrol** and **CNG** reported great **decreases**.

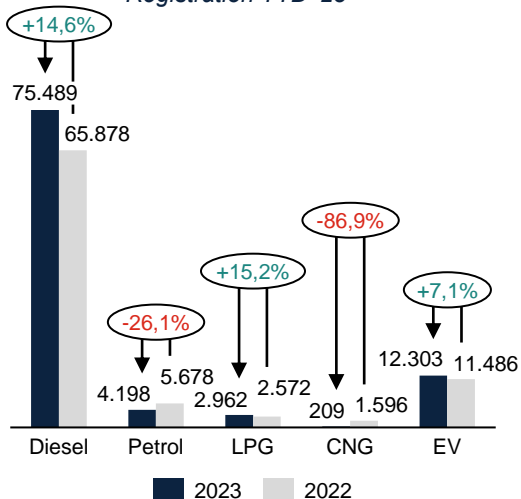
Analysis by "Customer Segment"

Registration YTD '23/'22

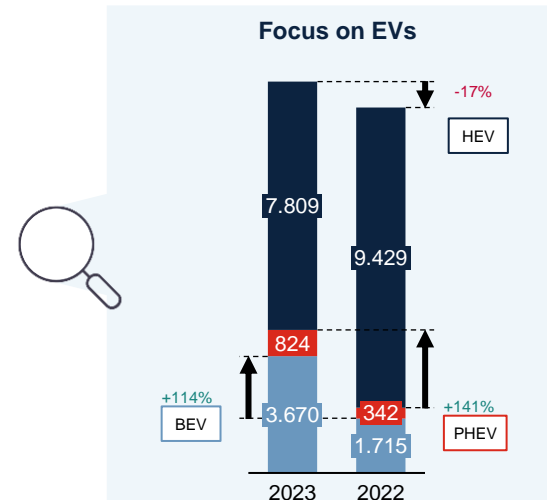


Analysis by "Fuel Type"

Registration YTD '23



Focus on EVs

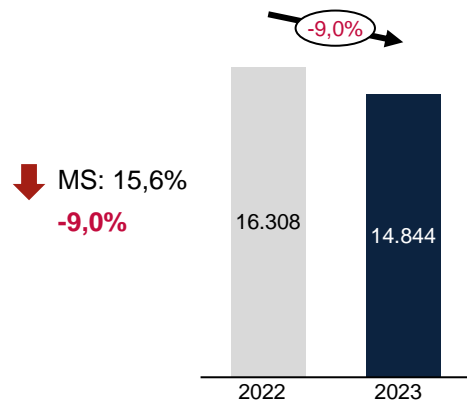


Italy | New Vehicles registrations



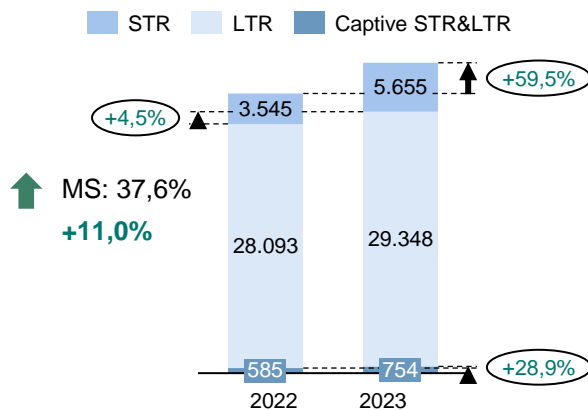
Italian Market - Commercial vehicles June 2023 YTD vs June 2022 YTD

Retail (Private Customers)



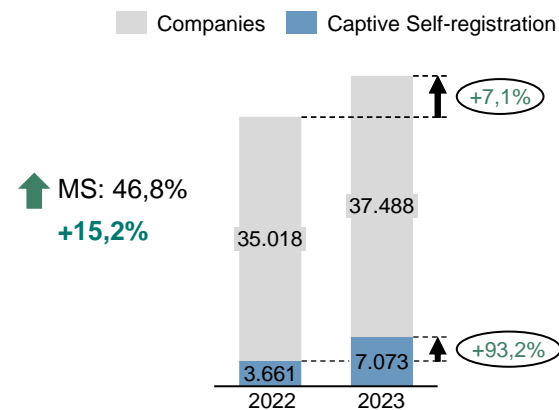
- Compared to **June 2022 YTD**, in the first 6 months of **2023**, the **Retail** segment registered a **decrease** both in terms of **registrations** (-9,1%) and **Market Share** (-3,1 p.p.: 15,6% in 2023 vs. 18,7% in 2022)

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



- All Fleet segments registered increases in **Jan to Jun 2023 over the same period in 2022**, highest for **Captive STR<R** (+28,9%) and **STR** (+59,5%). The **Market Share of Captive STR<R** (0,8% in Jun 2023 YTD vs 0,7% in Jun 2022 YTD) and **STR** (5,9% in Jun 2023 YTD vs 4,1% in Jun 2022 YTD) **increased**, while **LTR Market Share decreased** (30,8% in Jun 2023 YTD vs 32,2% in Jun 2022 YTD)

Business (Company registrations**)



- The increase of the **Business** segment registrations in **June 2023 YTD** is mainly related to the increase of **Captive self-registrations** (+93,2% or 3.412 units sold), and to a minor extent to **Companies registrations** (+7,1% or 2.470 additional units sold)

Market Share increase / decrease Jan-Jun 2023 / Jan-Jun 2022
 Δ% Volume Jan-Jun 2023 / Jan-Jun 2022



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About last Wednesday | AUTOMOTIVE TOWARDS 2023

Future mobility trends, market and industry challenges, Infrastructure readiness

AUTOMOTIVE TOWARDS 2035

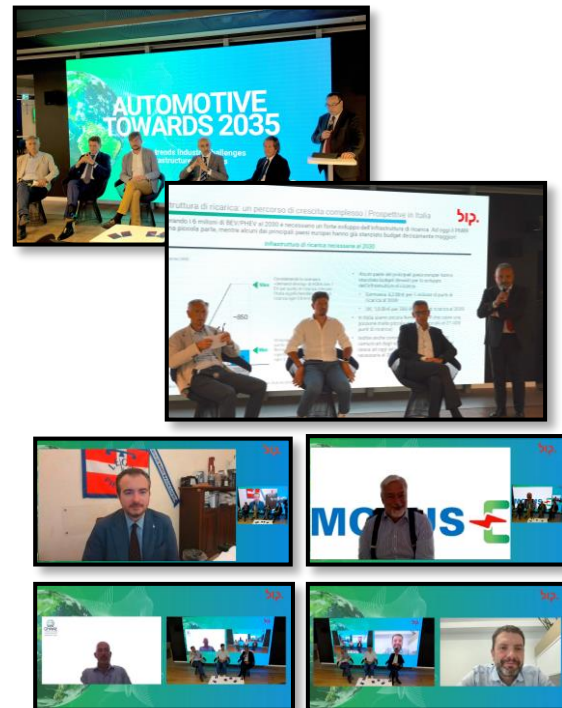
Market trends Industry challenges
Infrastructure readiness

MODERATOR: *Mauro Tedeschi (vailetrico)*

ATTENDEES: *Onorevole Riccardo Molinari (Presidente del gruppo della Lega alla Camera dei deputati); Gerardo Altieri (DR Automobiles); Andrea Ingallinera (BIP Automotive & Mobility Global Head); Fabrizio Arena (BIP Automotive & Mobility Partner); Fabrizio Faltoni (Ford Motor Company); Luigi Ksawery Luca (Toyota Motor Italy); Massimo Nordio (MOTUS-E and Volkswagen Group Italy); Marco Saltalamacchia (Koelliker Group); Federico Caleno (Enel X Way); Andrea Cardinali (UNRAE); Fabio Pressi (A2A); Federico Testa (ACEA)*



il Verde e il Blu Festival
powered by **bip.**



To review the event, click on the [following link](#)

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 26/06/2023 to 13/07/2023



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



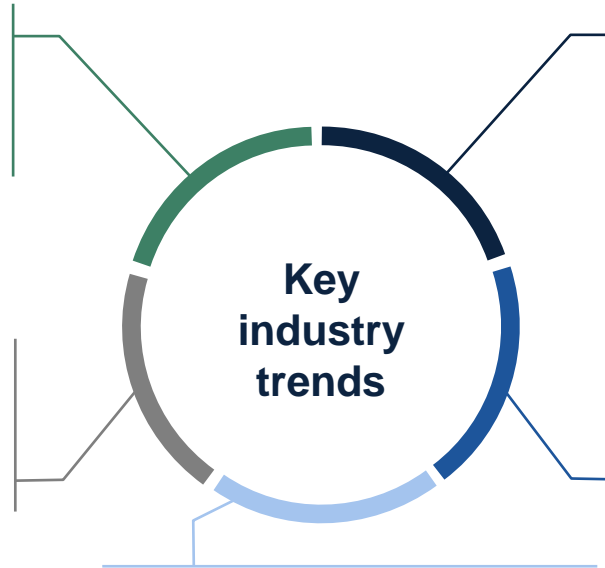
Electrification

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



Tesla to use Optimus robot in stores to help sales

Tesla is planning to use its Optimus robot, also known as Tesla Bot, in its stores in an attempt to help sales, but not necessarily how you think. We are not talking about robots (...)

<https://electrek.co/2023/07/06/tesla-use-optimus-robot-stores-help-sales/>

Taq Automotive Intelligence Partners with VinFast to Support Digital Retailing Offering

“We are excited to solidify this partnership with VinFast,” says Alan H. Bird, Chairman and CEO of taq. “Our business philosophy and early adaption to a digital automotive marketplace aligns well with VinFast’s direct-to-consumer model (...)

<https://www.businesswire.com/news/home/20230704308332/en/taq-Automotive-Intelligence-Partners-with-VinFast-to-Support-Digital-Retailing-Offering>

News on key industry trends

Electrification (1/3)



Toyota: thanks to new bipolar batteries 1.000 km range by 2026

The new lithium-ion batteries defined as bipolar, which, thanks to a different construction of the internal section, higher cell density and a revolutionary interaction between anode and cathode, will be able to guarantee 1.000 km of autonomy (...)

<https://e-ricarica.it/toyota-grazie-a-nuove-batterie-bipolari-1-000-km-di-autonomia-entro-il-2026/>

GasGas: portfolio at over 750 charging points. Target of 10.000 columns by 2030

GasGas has approved its 2022 budget: the Cpo has exceeded its targets for the current year six months early, reaching a portfolio of more than 750 charging points across Italy. The target is set at 10.000 columns installed by 2030 (...)

<https://e-ricarica.it/gasgas-portafoglio-a-oltre-750-charging-point-obiettivo-10mila-colonnine-entro-il-2030/>

EU approves 'Fit for 55' plan: at least one column every 60 km

The European Parliament has finally approved the Green Deal rules. Following the vote, member states will collectively have to ensure a reduction in energy consumption of at least 11.7 per cent by 2030 (...)

<https://e-ricarica.it/lue-approva-il-piano-fit-for-55-almeno-una-colonnina-ogni-60-km/>



News on key industry trends

Electrification (2/3)



Rivian: agreement with Tesla for NACS standards and access to Superchargers

After Ford and General Motors, the American manufacturer Rivian also entered into an agreement with Tesla to adopt the NACS standard and to guarantee its vehicles access to the Supercharger charging network (...)

<https://e-ricarica.it/rivian-accordo-con-tesla-per-standard-nacs-e-accesso-ai-supercharger/>

Carraro takes control of On Charge

Carraro takes control of On Charge: already a leading investor, the Venetian tractor company now becomes the majority shareholder of the e-mobility service company. 160 MW provided for over 6.000 users, 236 active charging points, over 1.500 charging points (...)

<https://www.vaielettrico-it.cdn.ampproject.org/c/s/www.vaielettrico.it/a-carraro-il-controllo-di-on-charge/?amp=1>

E-Gap launches the new Fast charging station, an off-grid solution designed with Pininfarina

E-Gap, a company committed to offering an on-demand urban charging service, has launched its first charging station. It is called E-Gap Fast and is an off grid solution that allows a combination of fast charging up to 120 k (...)

<https://e-ricarica.it/e-gap-lancia-la-nuova-colonnina-fast-soluzione-off-grid-progettata-con-pininfarina/>



News on key industry trends

Electrification (3/3)



Stellantis launches Free2move Charge to make it 'easy to always be charged'

Stellantis launched Free2move Charge, a 360-degree ecosystem that will seamlessly deliver charging and energy management to address all EV customer needs, anywhere and in any way. Managed by the new Stellantis Charging & Energy Business Unit (...)

<https://www.automotiveworld.com/news-releases/charging-your-way-stellantis-launches-free2move-charge-to-make-it-easy-to-always-be-charged/>



News on key industry trends

Connectivity



Wind River and Samsung team to advance the software-defined vehicle

Wind River, a leader in delivering software for mission-critical intelligent systems, today announced a collaboration with Samsung Electronics' System LSI business, a leader in advanced semiconductor technology (...)

<https://www.automotiveworld.com/news-releases/wind-river-and-samsung-team-to-advance-the-software-defined-vehicle/>

Toyota rewrites the rules: you no longer have to change your car, you can upgrade it

Here comes big news from Toyota, a service that aims to turn the car industry on its head: the Kinto Factory programme has been launched in Japan, allowing Prius owners to upgrade their vehicles after purchase with new technologies and functionalities (...)

<https://gizchina-it.cdn.ampproject.org/c/s/gizchina.it/2023/06/toyota-kinto-factory-servizio-aggiornamento-hardware-auto/amp/>



News on key industry trends

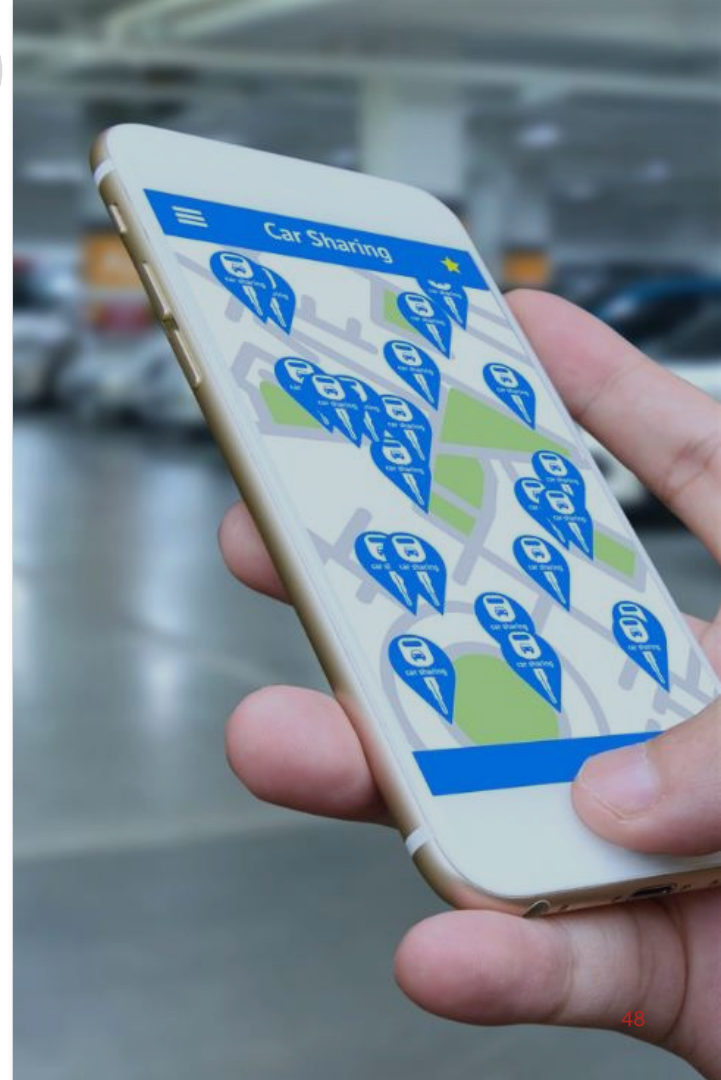
Mobility Services



Arriva Italy launches 'Arriva Click IT' booking app for on-demand public transport

Arriva Italy has partnered with ioki, a leading platform provider for digital solutions in Europe, to develop an app-based solution for booking on-demand bus services in the province of Cremona (...)

<https://www.automotiveworld.com/news-releases/arriva-italy-launches-arriva-click-it-booking-app-for-on-demand-public-transport/>



News on key industry trends

Sustainability



Stellantis to invest in a new 'grEEen-campus' in Mirafiori, Italy

The grEEen-campus is a place for exchanging and sharing ideas to promote creativity and efficiency, and ultimately create a highly desirable work environment. The transformation program directly supports Stellantis' carbon net zero by 2038 (...)

<https://www.automotiveworld.com/news-releases/stellantis-to-invest-in-a-new-green-campus-in-mirafiori-italy/>

BMW Group: Plant Dingolfing relies on locally produced heat from regional biomass to reduce CO2

BMW Group Plant Dingolfing will use heat produced from regional biomass and its own waste wood to meet about 50 percent of its process hot water requirements from 2025 onwards. The company signs a supply contract to this effect for just under 100,000 MWh (...)

<https://www.automotiveworld.com/news-releases/bmw-group-plant-dingolfing-relies-on-locally-produced-heat-from-regional-biomass-to-reduce-co2/>

Thank you.

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