

BIP AutoObserver

Analysis of new car registrations

August 2023



Executive Summary

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



Europe*

+20,7%

Top Countries by growth of new registrations: 26 countries grew in August 2023 compared to August 2022, the highest rates for Bulgaria (+37,8%), Germany (+37,3%) and Belgium (+27,3%). Hungary and Norway (-10,4%) registered the highest decrease, followed by Slovenia (-3,0%), Ireland (-0,5%) and Lithuania (-0,1%)

Top 3 Countries by market share: Germany 22,5% (-0,3 p.p.), UK 13,8% (+0,2 p.p.) and France 13,3% (-0,1 p.p.) in August 2023 YTD compared to August 2022 YTD

Brands: among the **Top 15 by volume**, the highest growth comparing August 2023 to August 2022 for Renault (+44,3%), Audi (+23,6%) and Skoda (+23,%). Citroen (-4,8%) and Ford (-2,8%) the only 2 brands with a decrease.

Premium brands:** all 3 German Premium brands increased both in the month of August 2023 and YTD, Audi (+23,6% monthly and +26,0% YTD), BMW (+20,4% monthly and +12,1% YTD) and Mercedes-Benz (+4,0% monthly and +6,9%YTD)



Italy

+ 12,0%

Areas monthly results: North-East +4,8%, North-West +5,2%, Center +24,0%, South +24,1% and Islands +16,3%, comparing August 2023 to August 2022

Customer segments: Retail +10,4%, Fleet +39,5% and Business +25,3% August 2023 YTD vs August 2022 YTD

Brands: considering YTD results, among the **Top 15 by volume** only Fiat and Citroen decreased (-6,5% and -9,9%); all the other brands registered an increase, the highest for Jeep (+42,1%)

Premium brands:** Audi registered the major increase in August 2023 (+11,1%), followed by BMW (+6,0%), while Mercedes-Benz decreased (-4,3%). In a YTD perspective all three are increasing: Audi (+33,5%), BMW (+27,7%) and Mercedes-Benz (+15,0%) compared to the same period of 2022



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* – August 2023

European Markets*
new car registrations

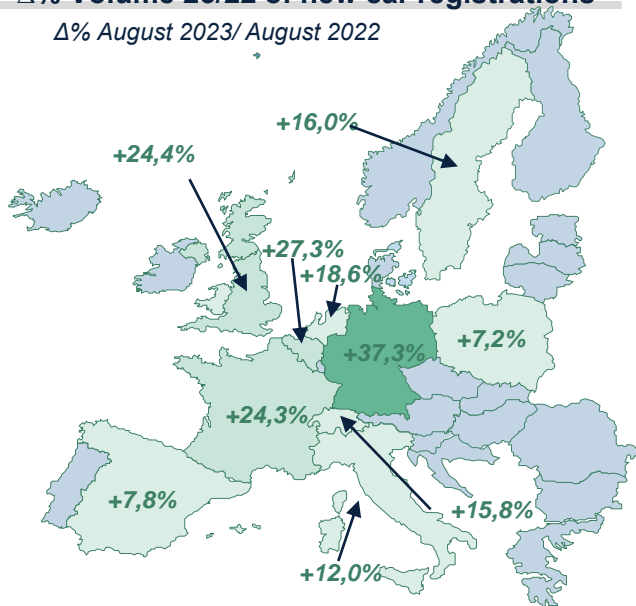
2023	904.509
2022	749.388

+20,7%



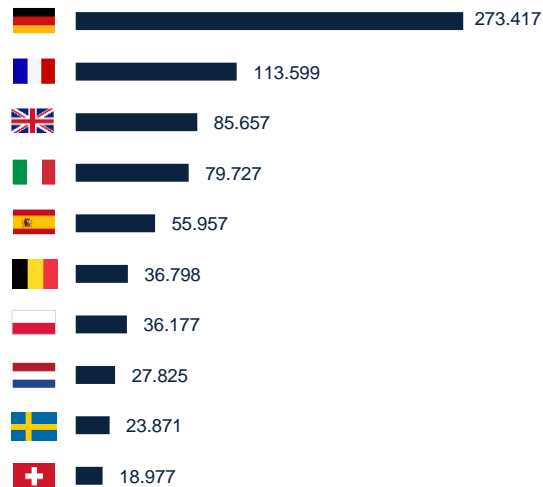
Δ% Volume 23/22 of new car registrations

Δ% August 2023/ August 2022



Number of EU new car registrations 2023

New car registration August 2023



! Highlights

- The European market (EU+UK+EFTA) **registrations** increased from 749.388 in August 2022 to 904.509 cars in August 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 by volume for:
 - Germany (+37,3%)
 - Belgium (+27,3%)
 - United Kingdom (+24,4%)
 - France (+24,3%)

Europe | Market Overview

Top 10 European Markets* – August 2023 YTD

European Markets*
new car registrations

2023
2022

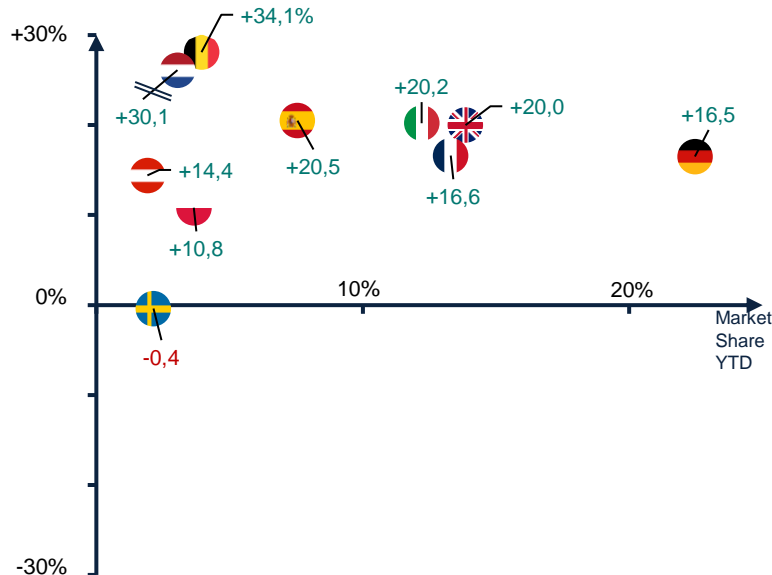
8.516.943
7.226.618

+17,9%



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

Δ % Volume August 23/22



#	Country	MS August 2023 YTD	Δ VS 2022	Sales Volume August 2023 YTD
1	GER	22,5%	+16,5%	1.913.564
2	UK	13,8%	+20,0%	1.179.298
3	FRA	13,3%	+16,6%	1.132.321
4	ITA	12,2%	+20,2%	1.039.773
5	SPA	7,5%	+20,5%	642.580
6	BEL	3,9%	+34,1%	335.942
7	POL	3,7%	+10,8%	311.239
8	NET	3,0%	+30,1%	259.106
9	SWE	2,1%	-0,4%	181.834
10	AT	1,9%	+14,4%	163.046



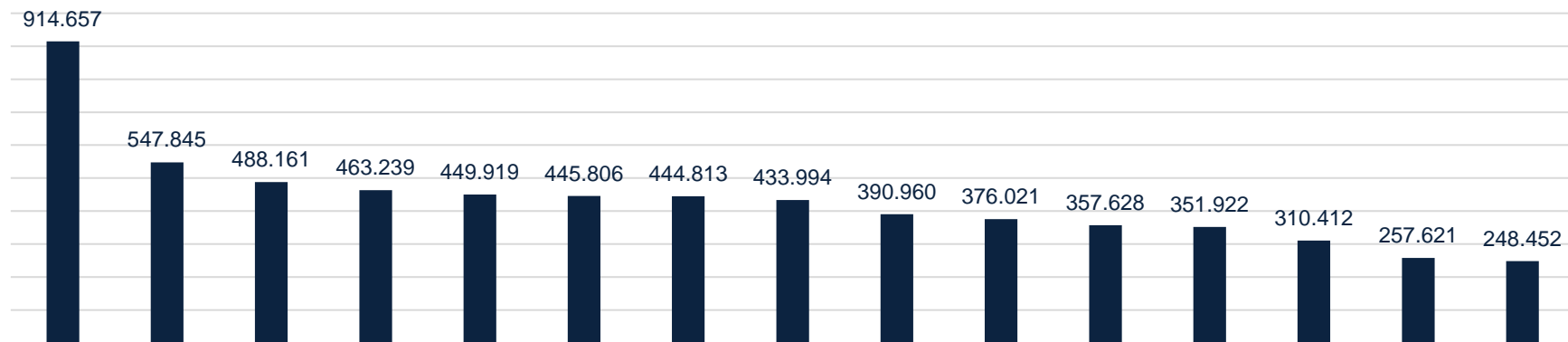
Highlights

- Considering YTD results, **28 countries out of 31 increased in August 2023 YTD** compared to August 2022 YTD, with most significant results for **Portugal (+36,8%), Croatia (+34,6%)** and **Belgium (+34,1%)**. Only 3 countries decreased and just Sweden in the top 10 for registration (-0,4%)

Europe | New car registrations by brand



Top 15 – August 2023 YTD



Δ Vol. 23/22	+19,7%	+9,8%	+26,0%	+12,1%	+29,8%	+5,8%	+22,6%	+6,9%	+4,8%	+22,5%	+2,6%	+7,4%	+5,5%	-3,5%	-3,1%
MS '22	10,7%	6,4%	5,7%	5,4%	5,3%	5,2%	5,2%	5,1%	4,6%	4,4%	4,2%	4,1%	3,6%	3,0%	2,9%
Δ MS 23/22	+0,94%	-7,25%	+5,56%	-5,26%	+10,42%	-10,34%	+4,00%	-8,93%	-11,54%	+4,76%	-12,50%	-8,89%	-12,20%	-18,92%	-17,14%



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



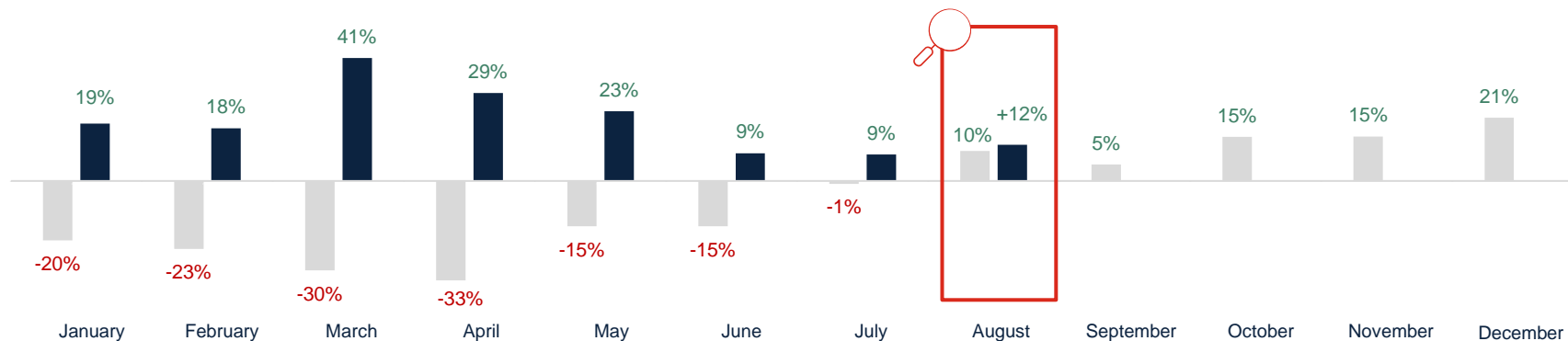
Italian Market – Variation of new car registrations 2023 vs 2022

August 2023 Highlights

August 2023 showed an **upward trend** compared to July (+8,8%) and June (9,2%), with 79.756 new registrations and **+12%** over August 2022, consolidating the YTD increase on 2022 with **+20,3%**. Recovery that is certainly linked to the improved product availability, but it should be noted that **the YTD results are still far behind than 2019** (-21,5%).

The breakdown of registrations by fuel type showed a **boost in growth for BEV**: after a double-digit growth in July (+14,9%), **BEV** scored a 76,8% increase and saw their Market Share rising from 3,2% to 5%; **PHEV** also performed well with a +22,8% and a +0,3 p.p. in Market Share. Growth of **HEV**, on the other hand, stopped, loosing 4,8 p.p. in their Market Share. **Among traditional fuels**, LPG positive trend continued (+25,8% in volumes, +1,1 p.p. in M.S.), while CNG crisis persisted (only 68 registrations, -82,5% in volume, -0,4 p.p. in M.S.).

In terms of sales channels, all have continued to show double-digit **growth YTD**. Relevant **monthly growth for Jeep** (+106,4%), **Dacia** (+42,1%) and **Renault** (+28,4%) in the top 15 by volume. Outside the top 15, significant growth of **MG** (+409,6%) and **Tesla** (+313,9%).



■ 2021/2022 ■ 2022/2023

Italy | Market Overview

Italian Market – August 2023 vs August 2022

Italy New Car Registrations

2023
2022

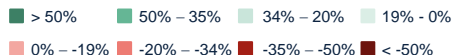
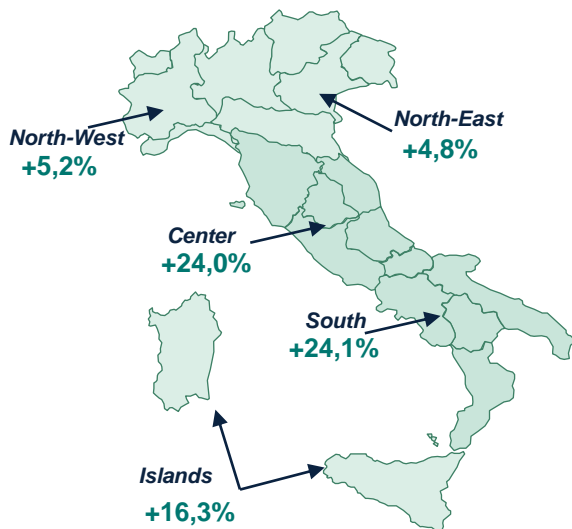
79.756
71.211

12,0%



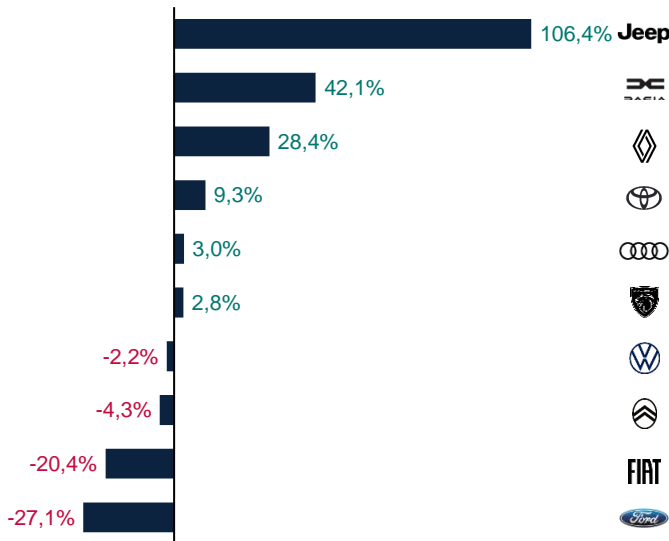
Δ% Volume 23/22 of New Car Registrations

Δ% August 2023/ August 2022



Growth of Top 10 Brands by Volumes

Δ% August 2023/ August 2022



! Highlights

- In **August 2023**, the Italian Market confirmed a positive result, with an increase of +12,0% compared to August 2022
- The highest growth** for **Jeep** (+106,4%), **Dacia** (+42,1%) and **Renault** (+28,4%).
- 6 out of 10 decreased, **Volkswagen** (-2,2%), **Citroen** (-4,3%), **Fiat** (-20,4%) and **Ford** (-27,1%)
- Although all regions in the **Italian Market** experienced an increase, **Central, Southern and Islands** regions grew at a significantly higher rate than the **Northern-West** and the **Northern-East**, reversing the trend of the previous months.

Italy | Market Overview

Italian Market – August 2023 YTD vs August 2022 YTD

Italy New Car Registrations (YTD)

2023
2022

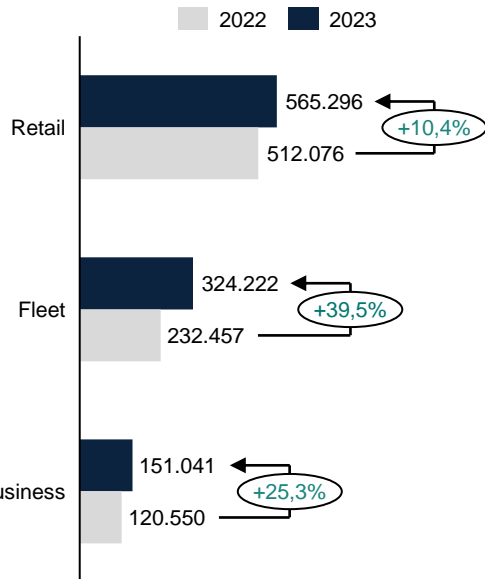
1.040.560
865.084

20,3%



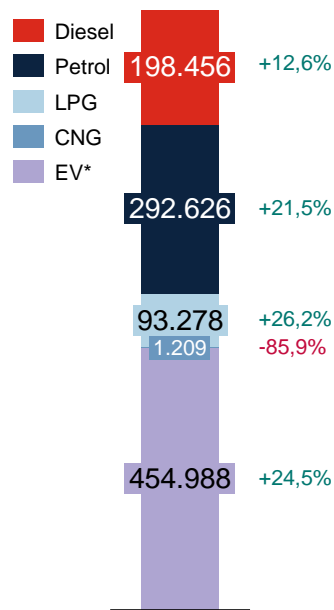
Analysis by “Customer Segment”

Registration YTD ‘23/’22



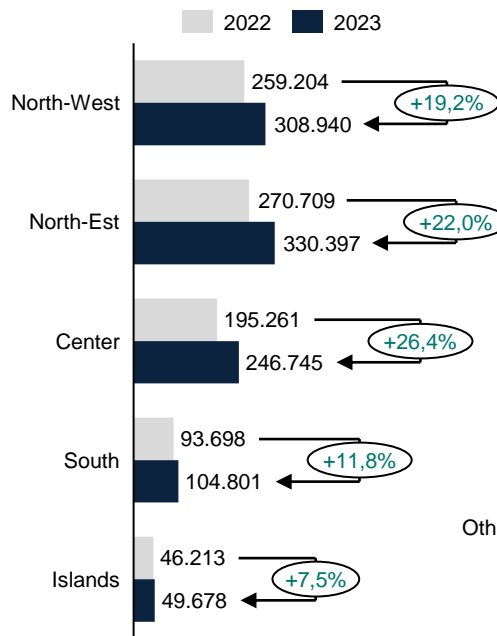
Analysis by “Fuel Type”

Registration YTD ‘23



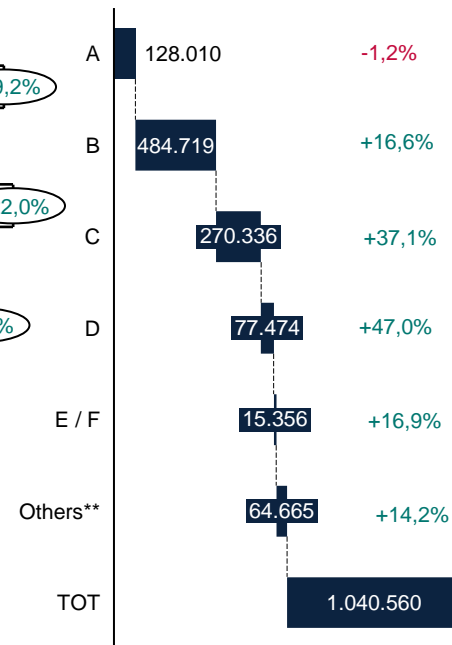
Analysis by “Geographical Area”

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

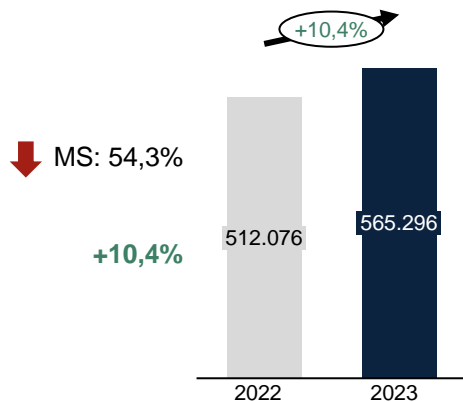
Italy | Market Highlights

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

Italy New Car Registrations (YTD)

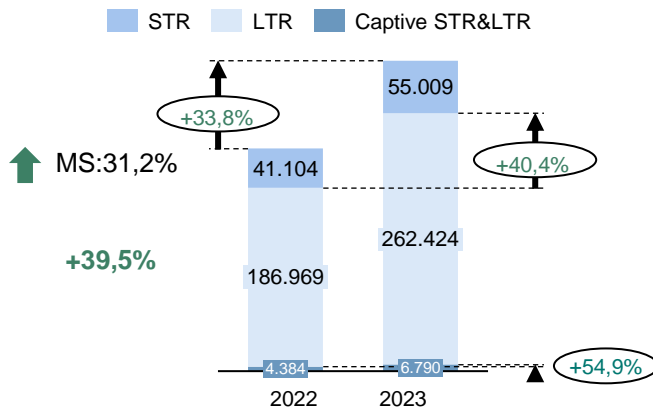
2023	1.040.560	20,3%  
2022	865.084	

Retail (Private Customers)



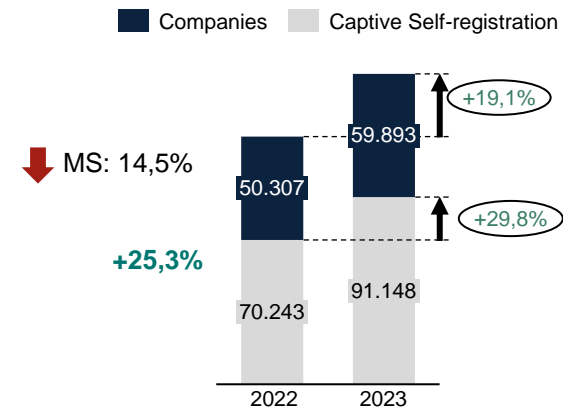
- Compared to **August 2022 YTD**, in **2023** the **Retail** segment registered an increase of +10,4% (53.220 additional units sold) but also the largest drop in terms of Market Share -4,9 p.p. (54,3% in August 2023 vs. 59,2% in August 2022), continuing to lose share to the Fleet segment

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






- **Fleet segment** confirmed in August YTD 2023 the positive result (+39,5%) led mainly by the **LTR** cluster. Among the three channels, Fleet showed an increase in its Market Share (+4,3 p.p.), led by **STR** (5,3% in August 2023 YTD vs 4,8% in August 2022 YTD), **LTR** (25,2% in August 2023 vs 21,6% in August 2022) and **Captive** (0,7% in August 2023 vs 0,5% in August 2022)

Business (Company registrations**)



- The growth of the **Business segment** registrations in **August 2023** is linked both to the increase of **Companies registrations** (+19,1% or 9.585 additional units sold), and **Captive self-registrations** (+29,8% or 20.905 units sold).

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



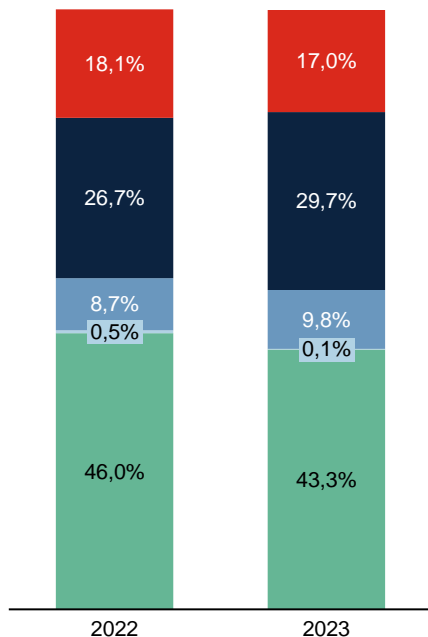
Source: UNRAE

(*) 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			
August '22	39,0%	3,8%	3,2%
MS			
August '23	34,2%	4,1%	5,0%
MS Delta			
August '23 vs. '22	-4,8 p.p.	+0,3 p.p.	+1,8 p.p.

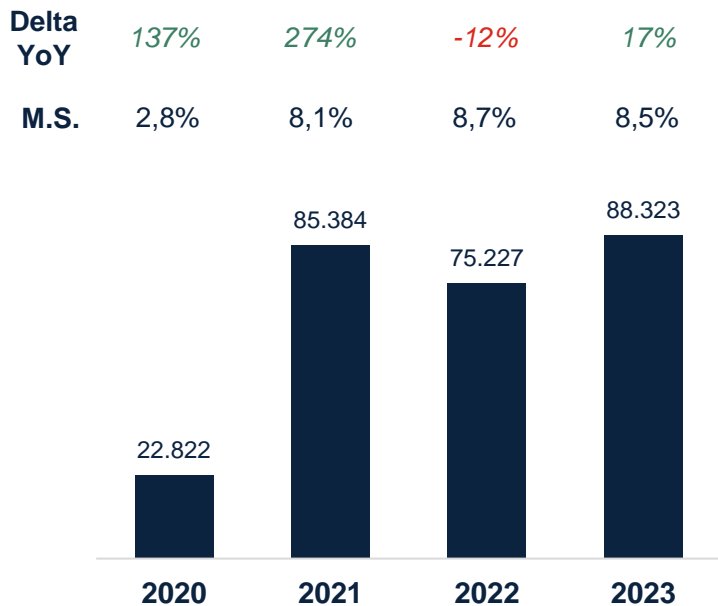
- In August 2023 **EVs showed a decrease in their Market Share (-2,7 p.p.) compared to 2022**
- **Petrol** registered the **higher increase** in terms of Market Share (+3,0 p.p.), followed by **LPG** (+1,1 p.p.), while the other fuel types recorded a drop (**Diesel** -1,1, p.p. and **CNG** -0,4 p.p.)
- **Regarding the EVs cluster**, high drop for the HEVs segment (-4,8 p.p.), while PHEVs and BEVs increased (+0,3 p.p. and +1,8 p.p. respectively).

Italy | New car registrations by fuel type

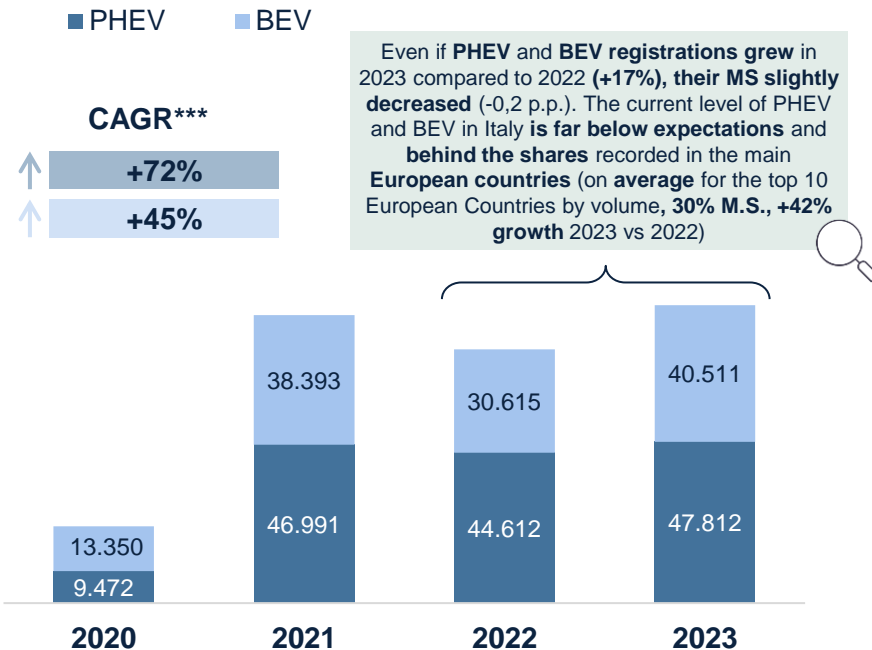


New car registrations of Hybrid vs Pure Electric vehicles

PHEV and BEV Registrations Trend August '23 YTD



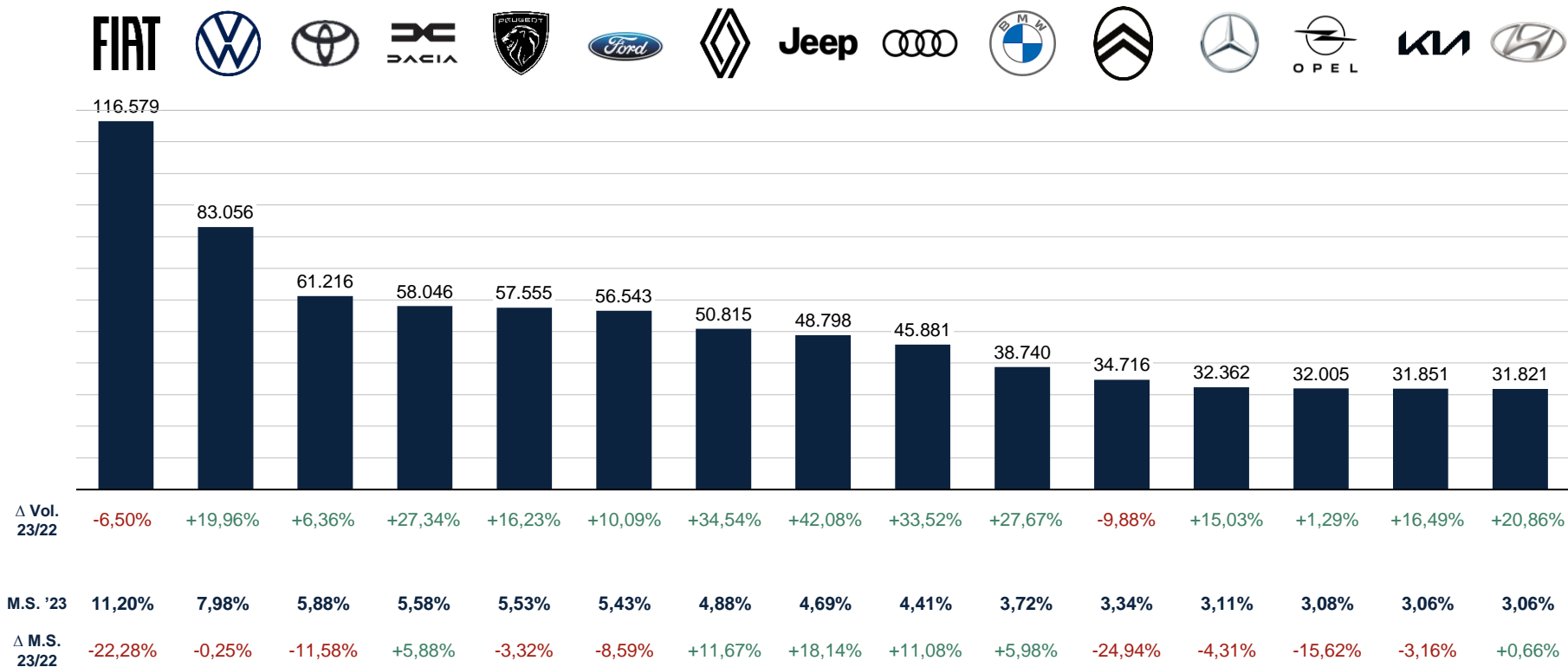
PHEV* and BEV** Vehicles Trend August '23 YTD



Italy | New car registrations by brand



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

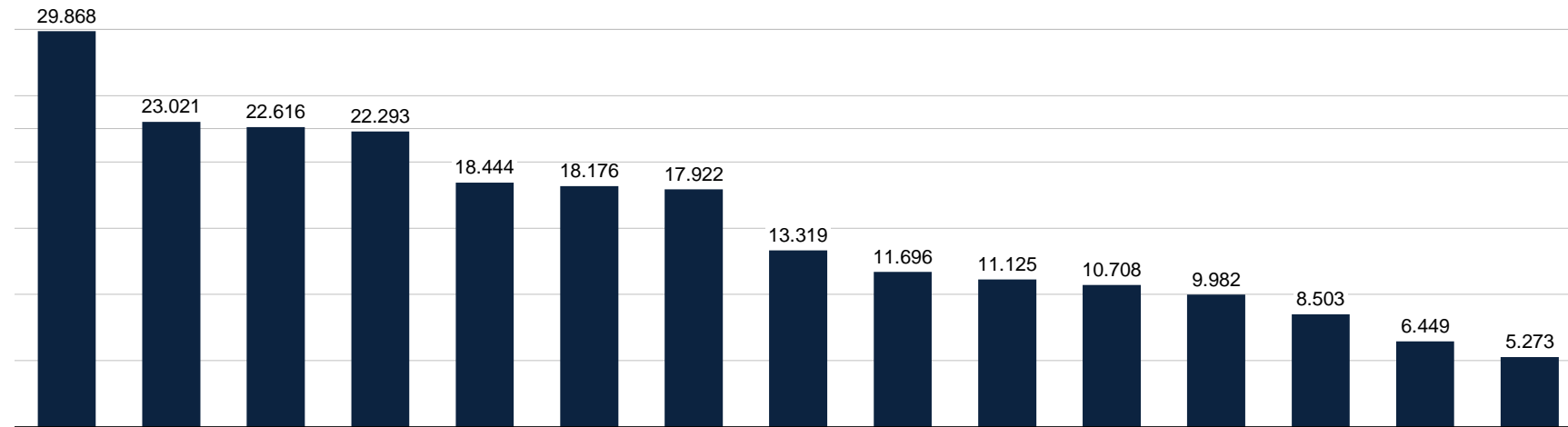


Source: UNRAE

Italy | New car registrations by brand



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



	LANCIA	NISSAN	SUZUKI	SKODA	dr	MG	ALFA ROMEO	MINI	VOLVO	TESLA	CUPRA	MAZDA	SEAT	LAND ROVER	KIA
Δ Vol. 23/22	+8,95%	+32,08%	+71,33%	+37,18%	+73,30%	+409,56%	+125,60%	+29,79%	+34,05%	+313,88%	+43,44%	+72,76%	-12,91%	+20,43%	+38,62%
M.S. '23	2,87%	2,21%	2,17%	2,14%	1,77%	1,75%	1,72%	1,28%	1,12%	1,07%	1,03%	0,96%	0,82%	0,62%	0,51%
Δ M.S. 23/22	-9,46%	+9,95%	+41,83%	+13,83%	+43,90%	+326,83%	+86,96%	+7,56%	+10,89%	+245,16%	+19,77%	+43,28%	-27,43%	+0,00%	+15,91%

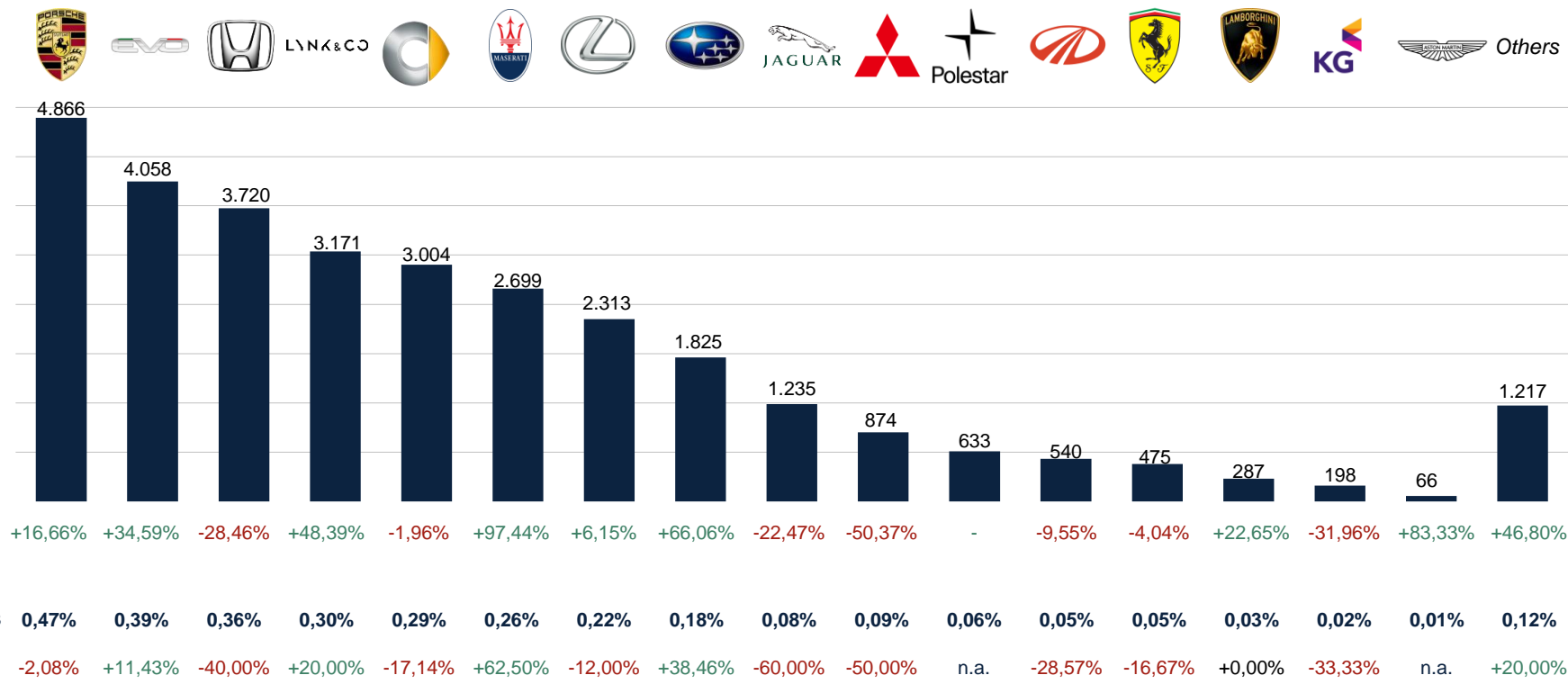


Source: UNRAE

Italy | New car registrations by brand



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



Source: UNRAE

Italy | New car registrations by group



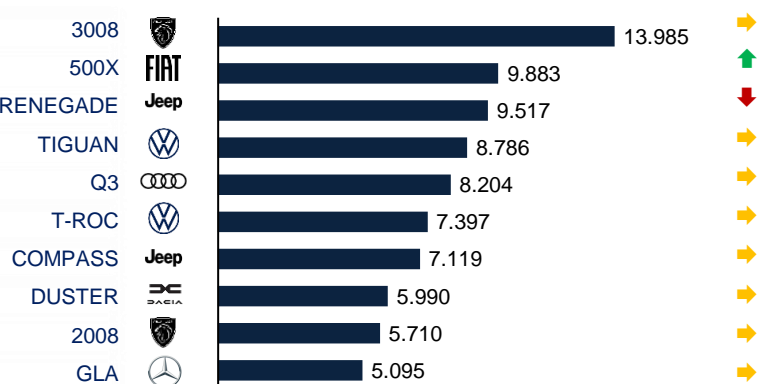
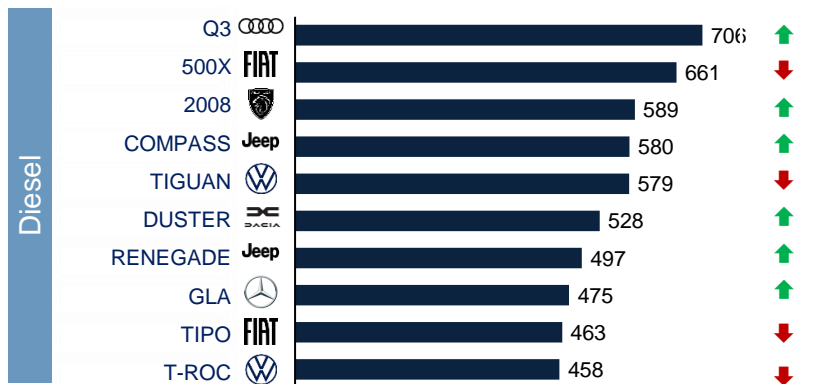
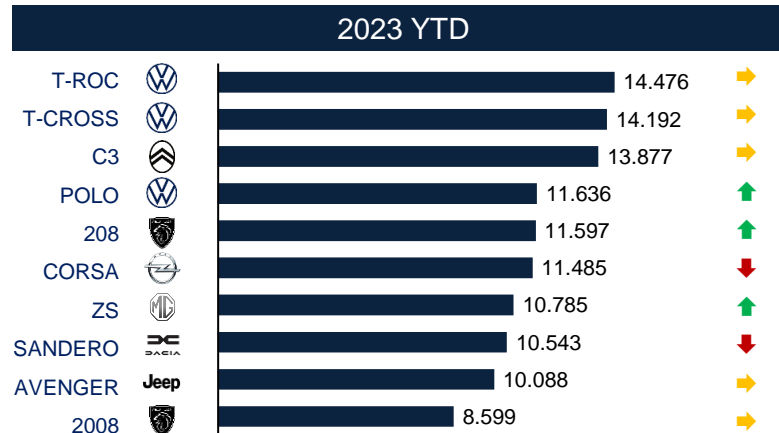
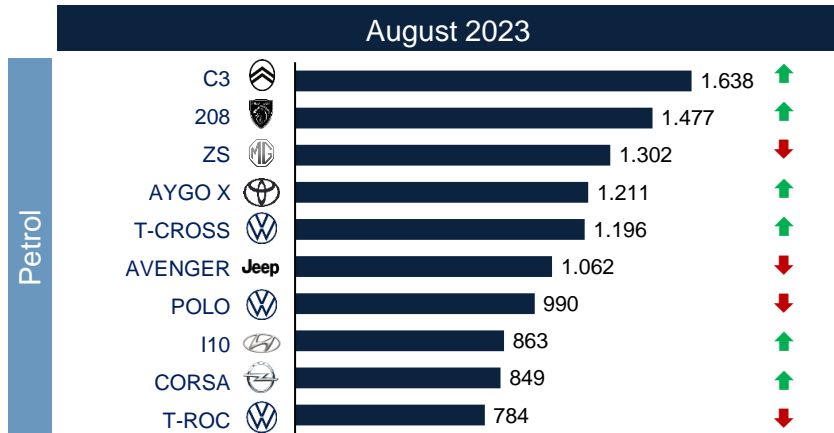
New car registrations by group – Top 15 – August 2023YTD

	Group	Brand	Volume	Δ% Volume '23 vs '22	Market Share (%)
1	Stellantis		345.415	8,2%	33,2%
2	Volkswagen		170.728	24,3%	16,4%
3	Renault		108.861	30,6%	10,5%
4	Toyota		63.529	6,4%	6,1%
5	Ford		56.543	10,1%	5,4%
<i>Top 5: 71,6%</i>					
6	BMW		52.059	28,2%	5,0%
7	Mercedes-Benz		35.366	13,4%	3,4%
8	Kia		31.851	16,5%	3,1%
9	Hyundai		31.821	20,9%	3,1%
10	Nissan Group		23.021	32,1%	2,2%
<i>Top 10: 88,4%</i>					
11	Suzuki		22.616	71,3%	2,2%
12	DR Group		22.502	64,8%	2,2%
13	MG		18.176	409,6%	1,8%
14	Volvo		11.696	34,1%	1,1%
15	Tesla		11.125	313,9%	1,1%

Italy | New car registrations by fuel type



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



Source: UNRAE

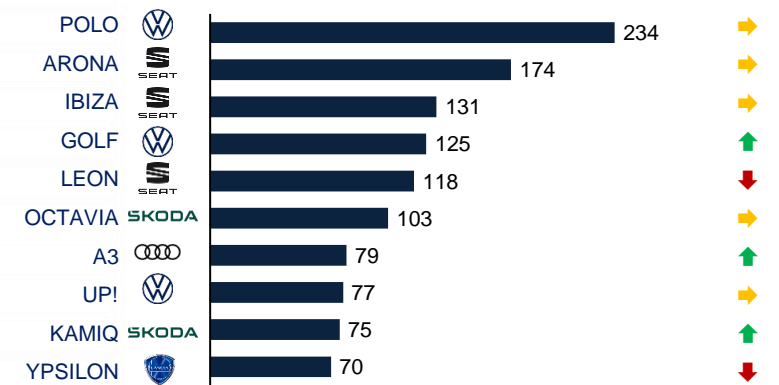
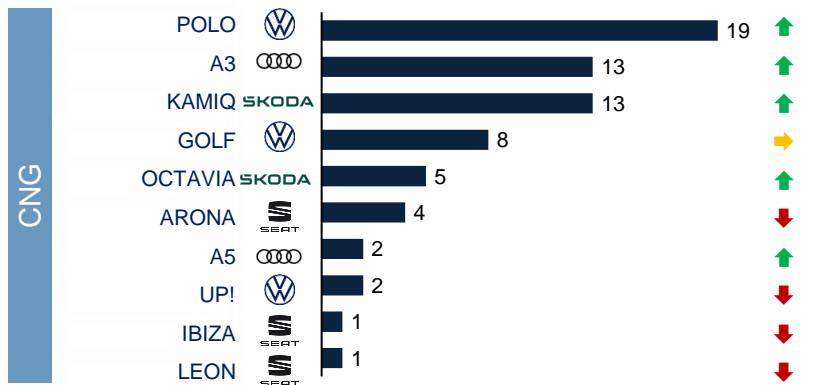
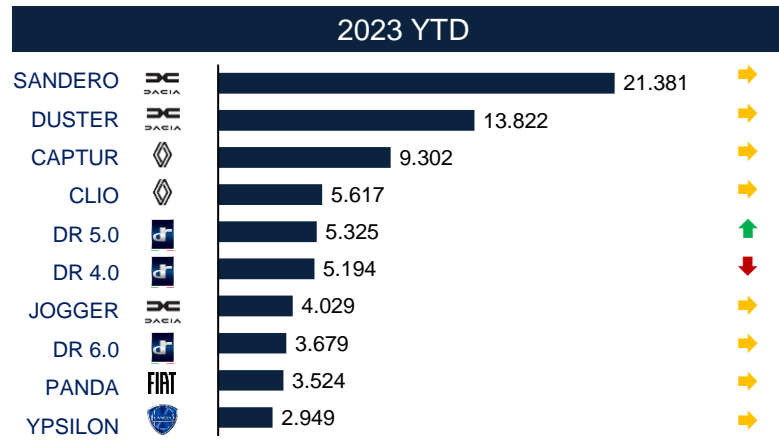
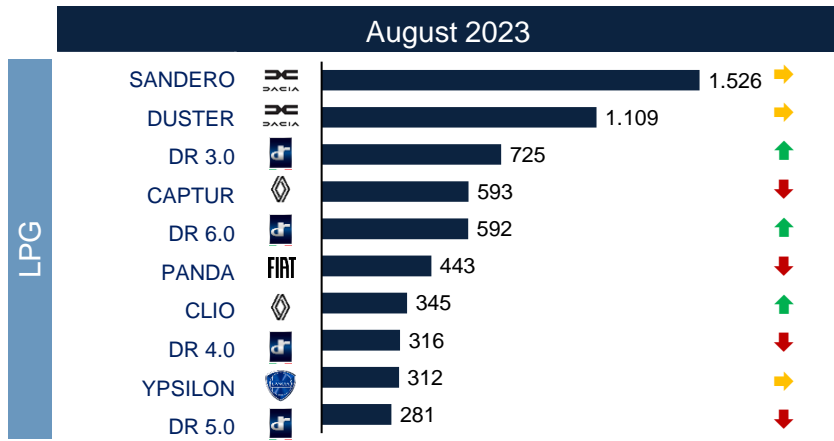


Ranking variation compared to previous period

Italy | New car registrations by fuel type



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



Source: UNRAE

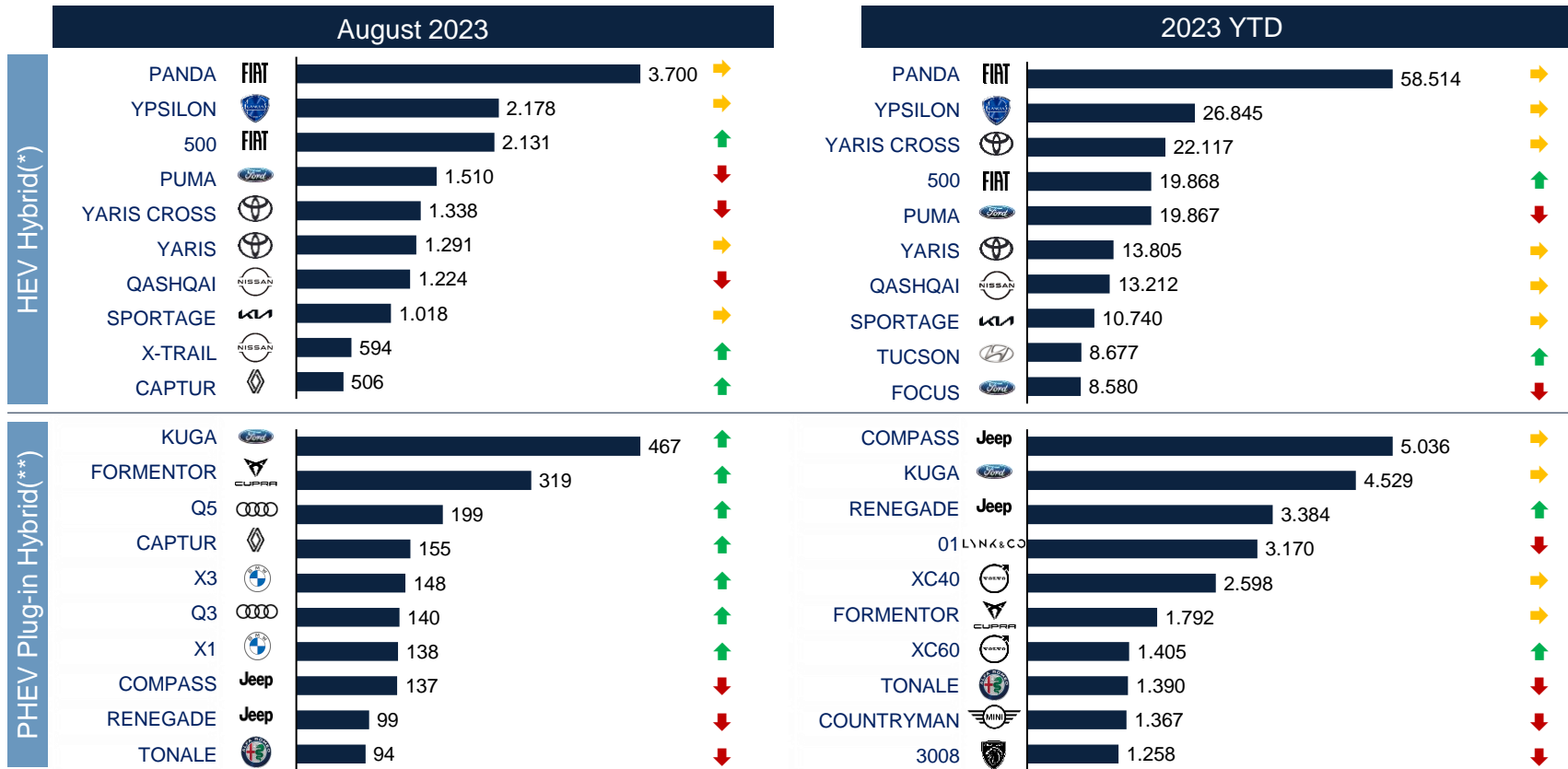


Ranking variation compared to previous period

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)

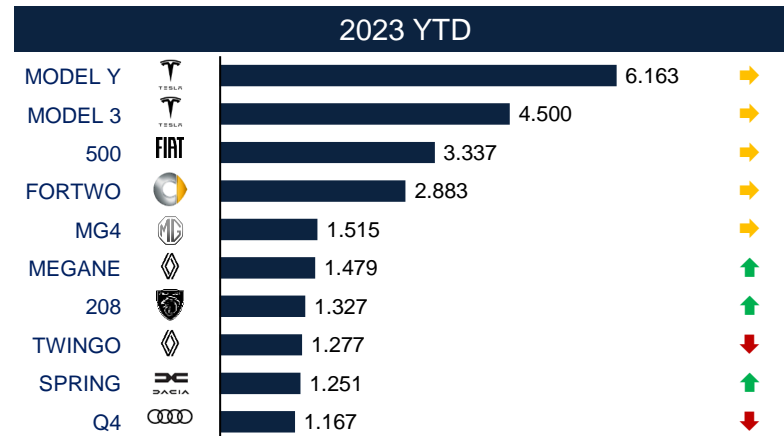
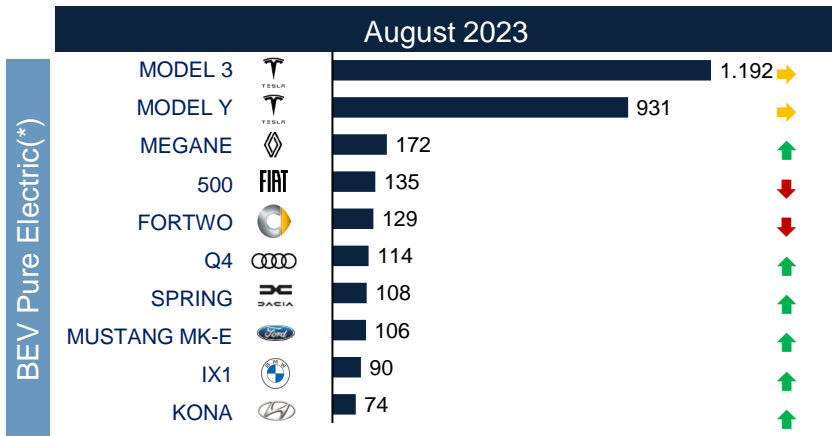


Ranking variation compared to previous period

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»



-2,6 p.p.

B
«Supermini»



-1,5 p.p.

C
«Medium»



3,2 p.p.

D
«Executive»



1,3 p.p.

E/F
«Luxury &
Ultra Luxury»



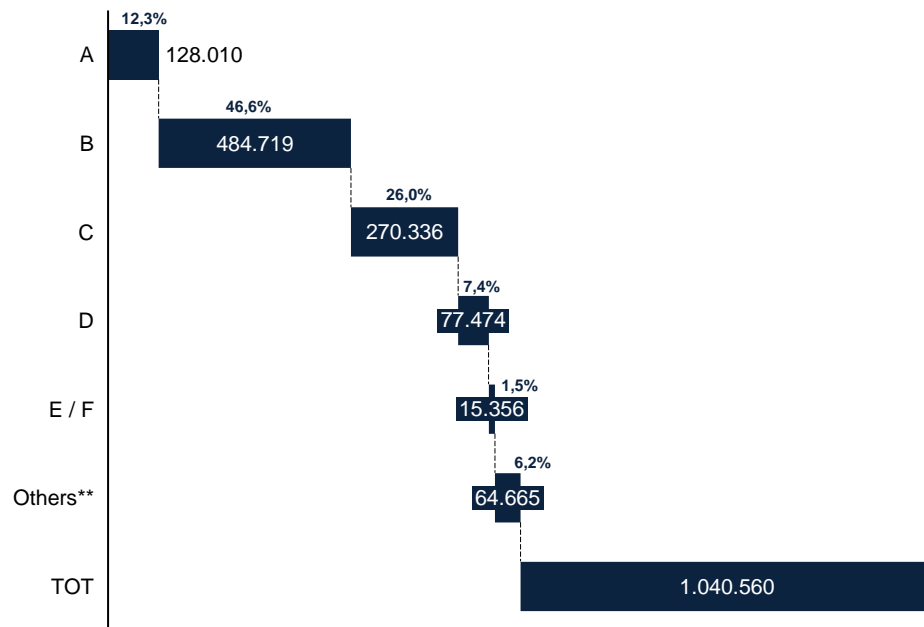
0,0 p.p.

Others
«Station wagon,
MPV, Sportive»



-0,4 p.p.

Market Share and Volume**



Italy | New car registrations by segment

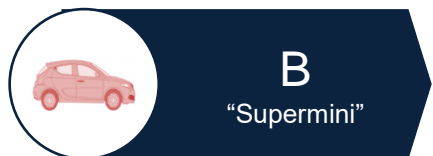
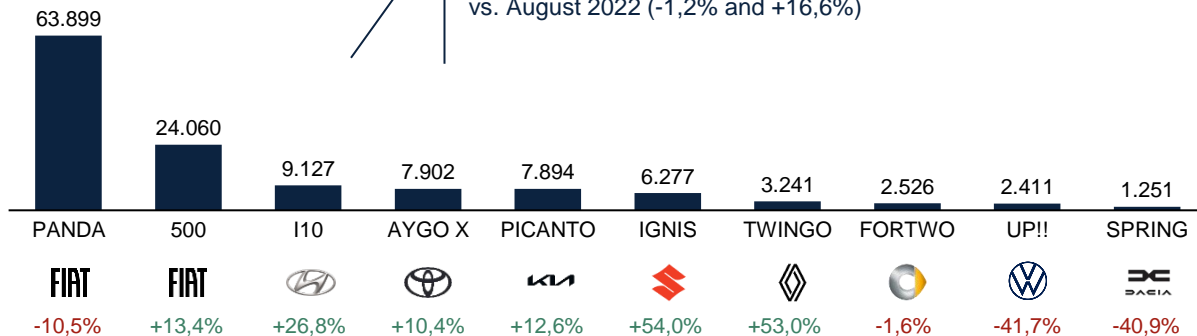


Segment A and Segment B – Top 10 – August '23 YTD

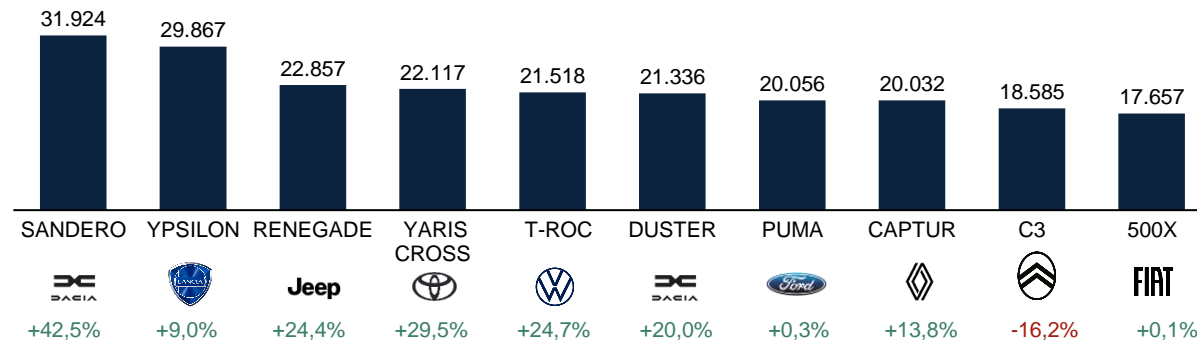
In terms of **MS**, in August 2023 YTD both **Segment A** and **Segment B** registered a decrease (-2,6 p.p. and -1,5 p.p.) vs August 2022. Considering the volumes, in August 2023 YTD **Segment A** registered a decrease while **Segment B** increased vs. August 2022 (-1,2% and +16,6%)



Δ Vol. %
23/22 YTD



Δ Vol. %
23/22 YTD



Italy | New car registrations by segment

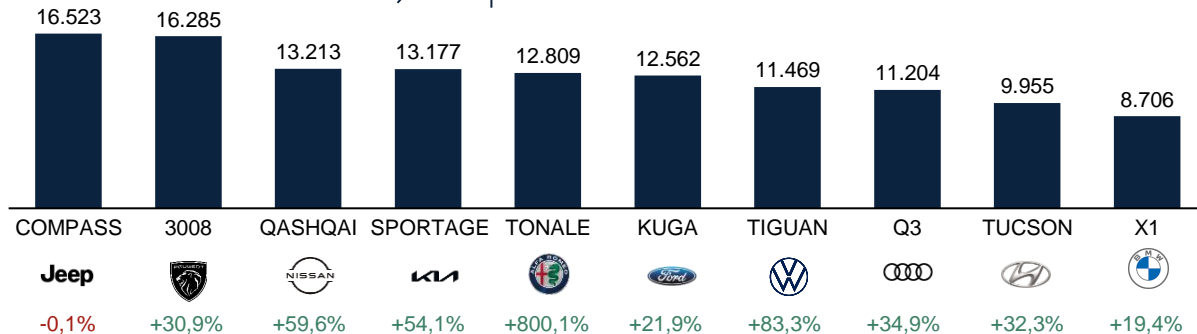
Segment C and Segment D – Top 10 – August '23 YTD



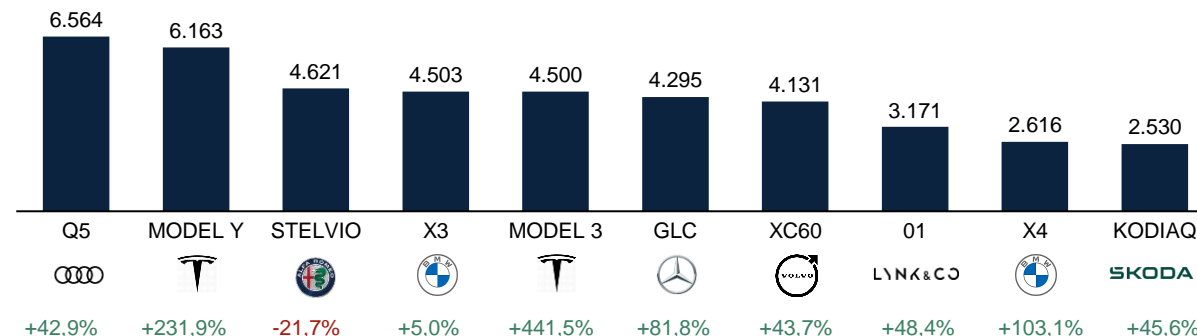
In terms of **MS**, in August 2023 YTD both **Segment C** and **Segment D** registered an increase (+3,2 p.p. and +1,3 p.p.) vs August 2022. Considering the volumes, in August 2023 YTD both **Segment C** and **Segment D** increased vs. August 2022 (+37,1% and +47,0%)



Δ Vol. %
23/22 YTD



Δ Vol. %
23/22 YTD



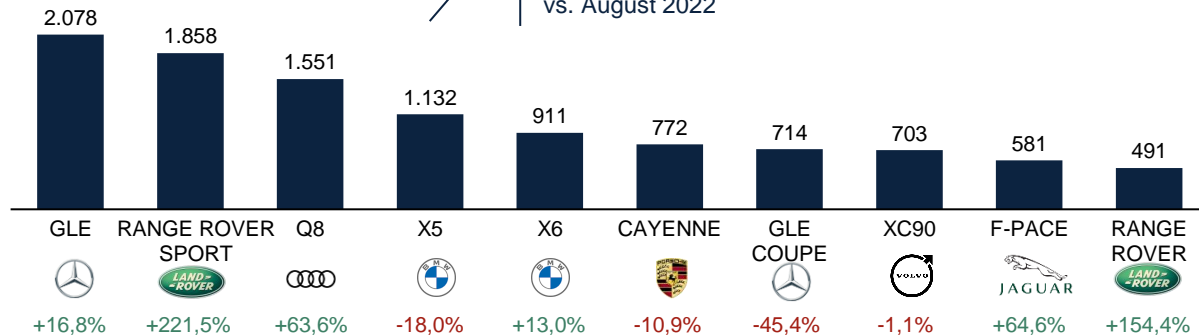
Italy | New car registrations by segment



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

E/F
"Luxury & Extra Luxury"

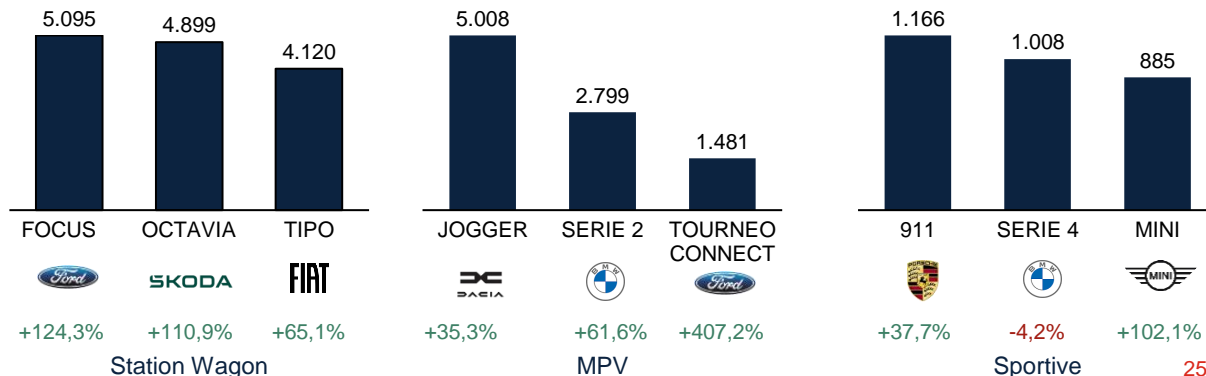
Δ Vol. %
23/22 YTD



In terms of **MS**, in August 2023 YTD, **Segment E/F** did not register any change (+0,0 p.p.) while **Others** decreased (-0,4 p.p.) vs August 2022. In terms of volumes, in August 2023 YTD both **Segment E/F** and **Others** increased (+16,9% and +14,2%) vs. August 2022

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



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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		
											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				X5, M2 ✓										
Jul														
Aug				Serie 7 →										
Sep				X2, iX2 →						Ferrari Roma Spider 	600e 	Kuga →	CR-V →	
Oct		Aston Martin DB12 →		M3CS, Serie 5 →								E-Transit Custom 	ZR-V 	Ioniq 7
Nov			Audi Q7 e Q8 →									Mustang 		
Dec	Brennero 33 Concept 		A3 Allstreet Q6 e-tron →								B-Suv e 595 e 		Civic Type R →	Santa Fe

New Car Models Launches in Italy

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

	I	J	K	L	M	N			
		JAGUAR	Jeep	KIA					
Jan									
Feb						EQS Suv			
Mar						EQE Suv			
Apr			Avenger e						
May		F-Type 75							
Jun									
Jul									
Aug									
Sep						Grecale/ Folgore	Classe G, GLA		ASX
Oct				EV9		Gran Turismo/ Folgore	AMG GLC, AMG C 63, GLE e GLE Coupè		
Nov			Korando E Motion		Aventador	Gran Cabrio/ Folgore	GLS, GLC Hybrid/ GLC Coupè		Colt
Dec		Recon	X200 , Torres	Urus Evo			Maybach EQS Suv	Countryman	



Source: Quattroruote, Motor1

- Launch Concluded
- Launch Postponed
- Launch Anticipated

- Commercial Launch of New Model
- Facelift / Technical Update
- (P) Premiere

New Car Models Launches in Italy

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

	O	P	R	SEAT	SKODA	S	SUZUKI	T	V		
Jan											EX90 ✓
Feb		408 ✓		Austral ✓			Forester ✓		Corolla ✓		
Mar											
Apr	Corsa ✓		Cayenne ✓								
May											
Jun	Astra GSe Astra-E ✓									Touareg ✓	
Jul			Clio ✓								
Aug		e-308 sw, e-308 ✓				#1 ✓			BZ4x ✓		
Sep			Macan EV 911 Safari	Arkana							
Oct		3008 Mild Hybrid		Grand Austral Scenic E-Tech				Swift		ID.7, Tiguan ID.3 GTX	
Nov		208								ID.Aero	
Dec		5008 Mild Hybrid		5 E-tech Elettric		Elroq		Cybertruck	Land Cruiser CH-R	Golf, T-Cross, Tiguan	XC 20 EX 30



Source: Quattroruote, Motor1

- ✓ Launch Concluded
- ➔ Launch Postponed
- ➔ Launch Anticipated

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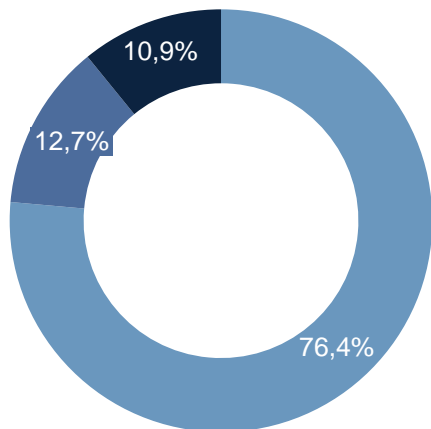
05. News on key industry trends



Commercial and Industrial Vehicles Highlights 2023

In **August 2023**, the **commercial and industrial vehicles Market** showed a **general growth** with a total of **15.756** new vehicles registered in the month (160.555 YTD). Both commercial and industrial vehicles registered increases in August 2023 compared to August 2022. Commercial **vehicles segment ($\leq 3,5t$)** recorded a +13,6%, while **light mass segment ($<16t$)** and **heavy mass segment ($\geq 16t$)** reported +21,2% and +23,0%, respectively.

Vehicles YTD distribution by category



■ ≤ 3,5t ■ 3,5 t - 16t ■ ≥ 16t

160.555

Total registered vehicles
+ 15,4%
compared to 2022 registrations
(139.074)

Commercial
vehicles YTD

122.674 +13,6% *

Light mass
vehicles YTD

20.420 +21,2% *

Heavy mass
vehicles YTD

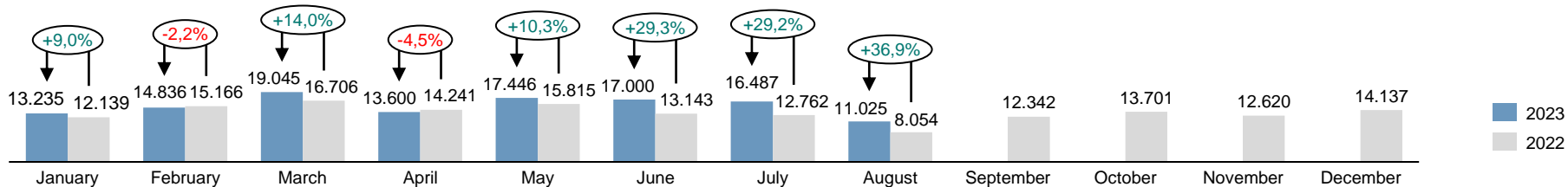
17.461 +23,0% *

Italy | New Vehicles registrations

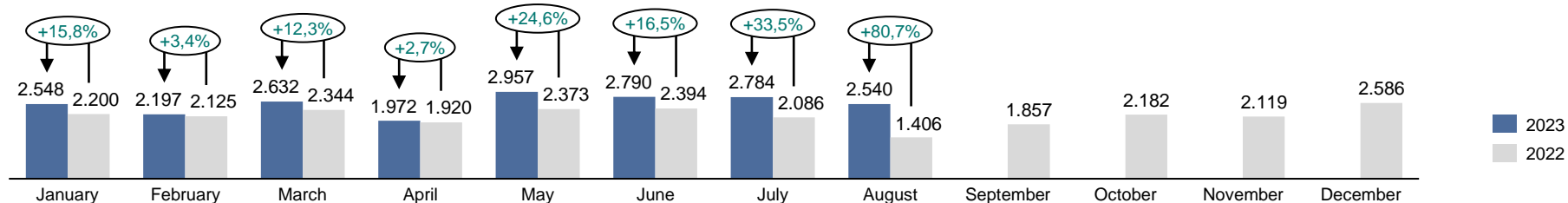


Italian Market - Commercial and Industrial vehicles Registration 2023 vs 2022 (2/2)

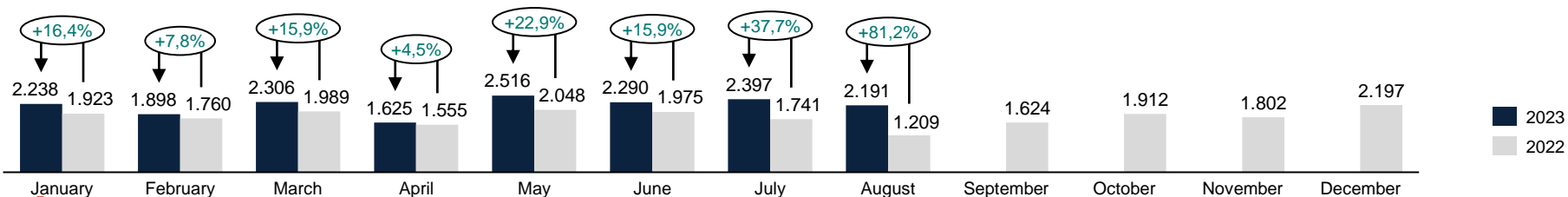
Commercial Vehicles ≤ 3,5t Monthly Data – 2023 vs 2022



Industrial Vehicles | Light mass segment 3,5t – 16t Monthly Data – 2023 vs 2022



Industrial Vehicles | Heavy mass segment ≥ 16t Monthly Data – 2023 vs 2022



Italy | New Vehicles registrations



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

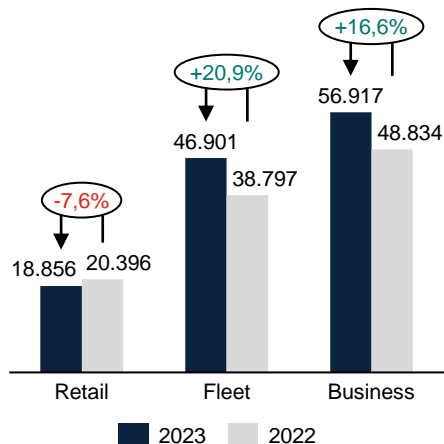
Commercial Vehicles January - August Analysis

In the first 8 months of **2023**, the **commercial vehicles** increased in new registrations (+13,6%), with a total of **122.674**, mainly driven by **Business** and **Fleet segments**, while **Retail** recorded a **decrease**.

Regarding the fuel type, significant increases for **Diesel** (+19,4%), **LPG** (+16,0%) and **EV** (+7,8%), while **Petrol** and **CNG** reported great **decreases**.

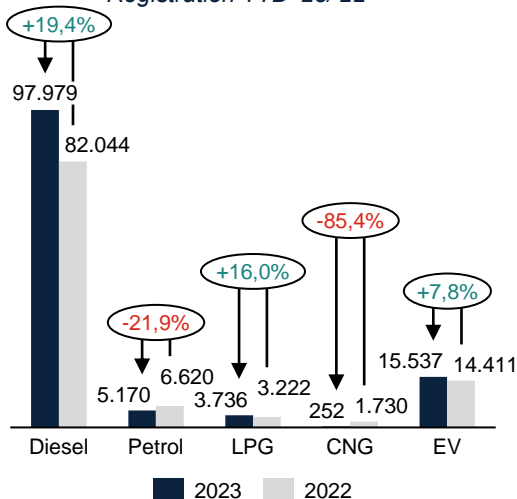
Analysis by "Customer Segment"

Registration YTD '23/'22

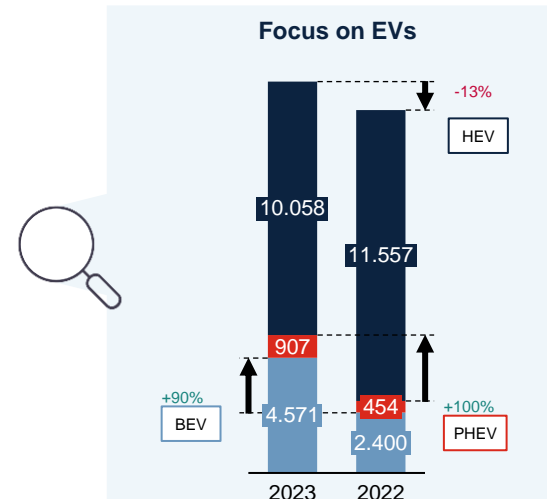


Analysis by "Fuel Type"

Registration YTD '23/'22



Focus on EVs

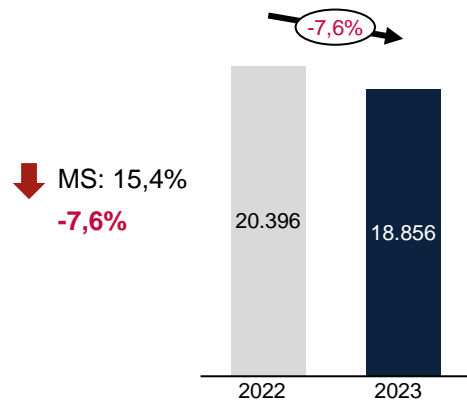


Italy | New Vehicles registrations



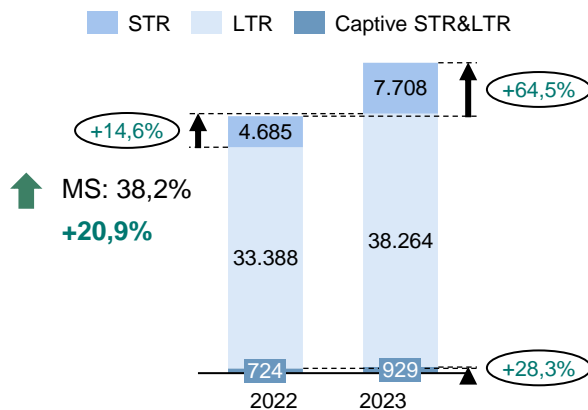
Italian Market - Commercial vehicles August 2023 YTD vs August 2022 YTD

Retail (Private Customers)



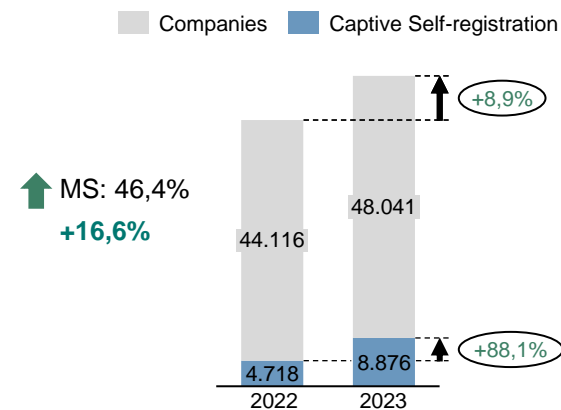
- Compared to **August 2022 YTD**, in the first 8 months of **2023**, the **Retail** segment registered a **decrease** both in terms of **registrations (-7,6%)** and **Market Share (-3,5 p.p.: 15,4% in 2023 vs. 18,9% in 2022)**

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



- All Fleet segments registered increases in **Jan to Aug 2023 over the same period in 2022**, highest for **Captive STR<R (+28,3%)** and **STR (+64,5%)**. The **Market Share** of all segments increased, as detailed below: **Captive STR<R (0,8% in Aug 2023 YTD vs 0,7% in Aug 2022 YTD)**, **STR (6,3% in Aug 2023 YTD vs 4,3% in Aug 2022 YTD)** and **LTR (31,2% in Aug 2023 YTD vs 30,9% in Aug 2022 YTD)**

Business (Company registrations**)



- The increase of the **Business** segment registrations in **August 2023 YTD** is mainly related to the increase of **Captive self-registrations (+88,1% or 4.158 units sold)**, and to a minor extent to **Companies registrations (+8,9% or 3.925 additional units sold)**

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



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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 01/08/2023 to 14/09/2023



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



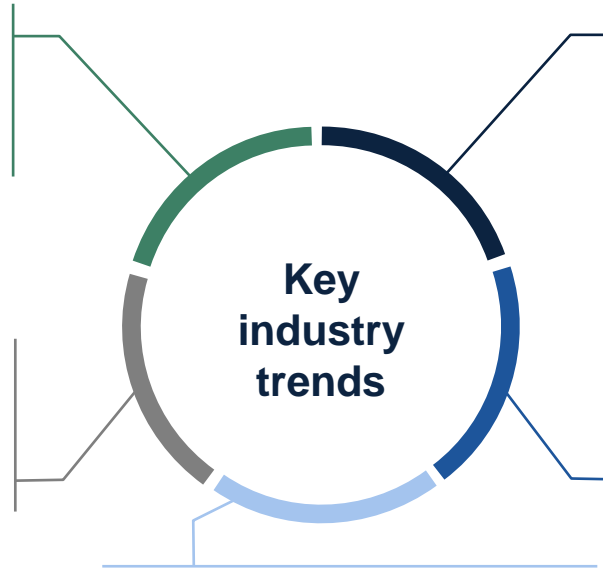
Electrification

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



Hyundai introduces in-vehicle payment service, Hyundai Pay, on all-new 2024 Kona

Hyundai Motor America is bringing in-vehicle payments to customers with the introduction of Hyundai Pay. The Hyundai Pay system allows customers to find and pay for things with their vehicle's touchscreen using securely stored credit card information (...)

<https://www.automotiveworld.com/news-releases/hyundai-introduces-in-vehicle-payment-service-hyundai-pay-on-all-new-2024-kona/>



News on key industry trends

Electrification (1/2)



Plug & Charge on Hyundai: here we go

At the moment, the only Plug & Charge-enabled stations on Hyundais are the Ionity (also present in Italy) and the Aral Pulse (in Germany). But this is the protocol of the future, for simplicity and security, and it's a safe bet that other major networks will soon follow the same path (...)

<https://news.italy24.press/business/832165.html>

Catl announces superfast battery: 400 km range in 10 minutes

This development has been made possible thanks to the new technology used for the Shenxing cells, which, in addition to ensuring shorter charging times, guarantee better maintenance of the vehicle's range even in extreme weather conditions in terms of temperature (...)

<https://e-ricarica.it/catl-annuncia-una-batteria-superveloce-400-km-di-autonomia-in-10-minuti/>

Atlante to receive c. €70 million of financial support for 1,800 fast and ultra-fast points of charge

Atlante, the company of NHOA Group (NHOA.PA, formerly Engie EPS) dedicated to fast and ultra-fast charging network for electric vehicles ("EV"), has been selected once more for support by the European Union under CEF 2 Transport (...)

<https://nhoa.energy/documents/atlane-to-receive-c-e70-million-of-financial-support-from-european-union-and-groupe-caisse-des-depots-for-1800-fast-and-ultra-fast-points-of-charge/>



News on key industry trends

Electrification (2/2)



Mercedes' first Hpc stations go live in October

Mercedes-Benz has announced its intention to establish its own global ultrafast public charging network. The German giant has now confirmed the inauguration of the first three stations for next October. The goals are to reach 2.000 charging points by the end of 2024 (...)

<https://e-ricarica.it/a-ottobre-attive-le-prime-stazioni-hpc-di-mercedes/>

All GM Ultium-Based EVs To Get Bidirectional Vehicle-To-Home Charging By 2026

The use of the bidirectional V2H could help people to provide energy to their own home. In the case of the bidirectional system on some trucks, the wall unit has a CCS charging connector that takes direct current out from the battery and feeds it to an off-board (...)

<https://www.forbes-com.cdn.ampproject.org/c/s/www.forbes.com/sites/samabuelsamid/2023/08/08/all-gm-ultium-based-evs-to-get-bidirectional-vehicle-to-home-charging-by-2026/amp/>



News on key industry trends

Connectivity (1/2)



Mercedes-Benz details new MBUX software update for over 700.000 vehicles

The update, called MBUX Entertainment Update (2.4), will be delivered to models equipped with second-generation MBUX systems between August 2023 and November 2023 (...)

<https://telematicsnews.info/2023/09/05/mercedes-benz-details-new-mbux-software-update-for-over-700000-vehicles/>

GM uses Google's artificial intelligence chatbots to handle simple OnStar calls

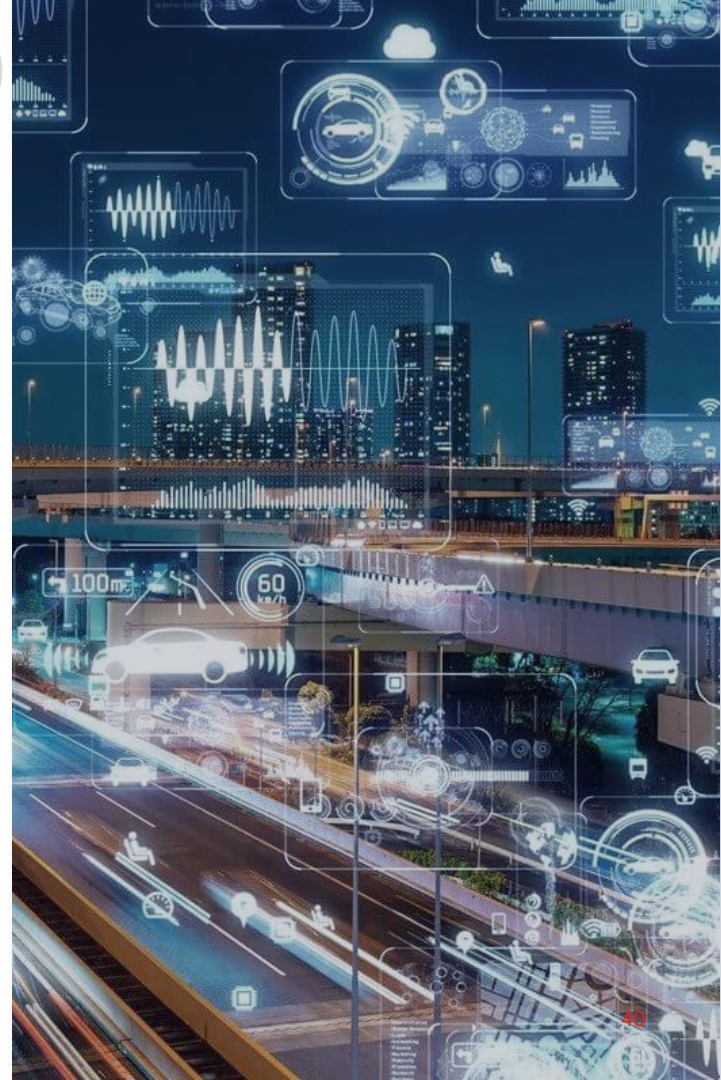
GM spoke about its use of artificial intelligence at the Google Cloud Next conference. The company introduced Dialogflow technology that will enable OnStar's virtual assistant to handle over 1 million requests per month (...)

<https://gagadget.com/it/304730-gm-utilizza-i-chatbot-di-intelligenza-artificiale-di-google-per-gestire-semplici-chiamate-onstar/>

Germany OKs Ford's semi-autonomous BlueCruise feature, enabling hands-free driving

Ford Motor Company has announced that Germany is the next market where customers will gain access to its BlueCruise driver assistance technology. Following approval, Ford drivers in Germany can now take advantage of true hands-free driving (...)

<https://electrek.co/2023/08/29/germany-ford-semi-autonomous-bluecruise-feature-hands-free-driving/>



News on key industry trends

Connectivity (2/2)



Continental integrates Google Cloud into vehicle cockpit

Continental will integrate Google Cloud services into its vehicle cockpit system, the company said on Monday, enabling drivers to ask the vehicle for assistance such as context on nearby sights or information on the vehicle while driving (...)

<https://europe.autonews.com/suppliers/continental-integrate-google-cloud-vehicle-cockpit>

Chinese create new brand for self-driving cars

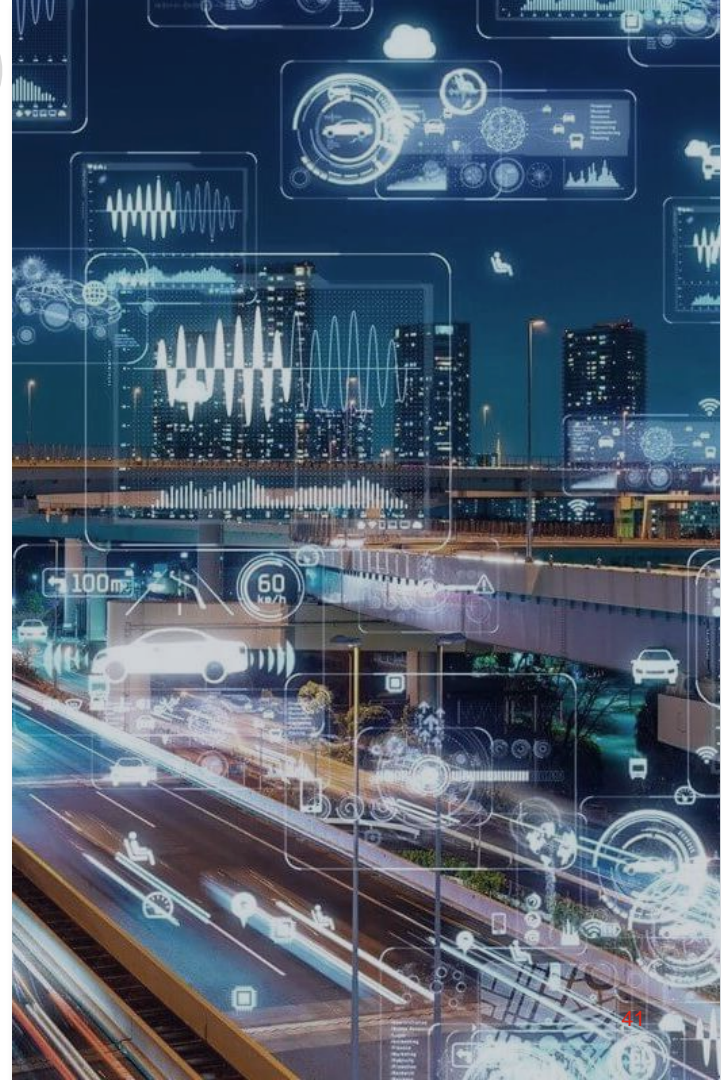
The Chinese Geely Holding Group and Baidu Inc are launching a new brand: it is called Ji Yue and is a premium brand for electric cars with advanced technology. The first model is the Ji Yue 01 and will go into production soon (...)

<https://insideevs-it.cdn.ampproject.org/c/s/insideevs.it/news/681998/ji-yue-brand-auto-autonome/amp/>

Schaeffler and VDL Group to team up on self-driving shuttles

Schaeffler and VDL Group are jointly exploring the development and production of a new generation of self-driving shuttles for public transport. The initiators intend to bring together their technological competencies and expertise in systems engineering, development (...)

<https://www.automotiveworld.com/news-releases/schaeffler-and-vdl-groep-to-team-up-on-self-driving-shuttles/>



News on key industry trends

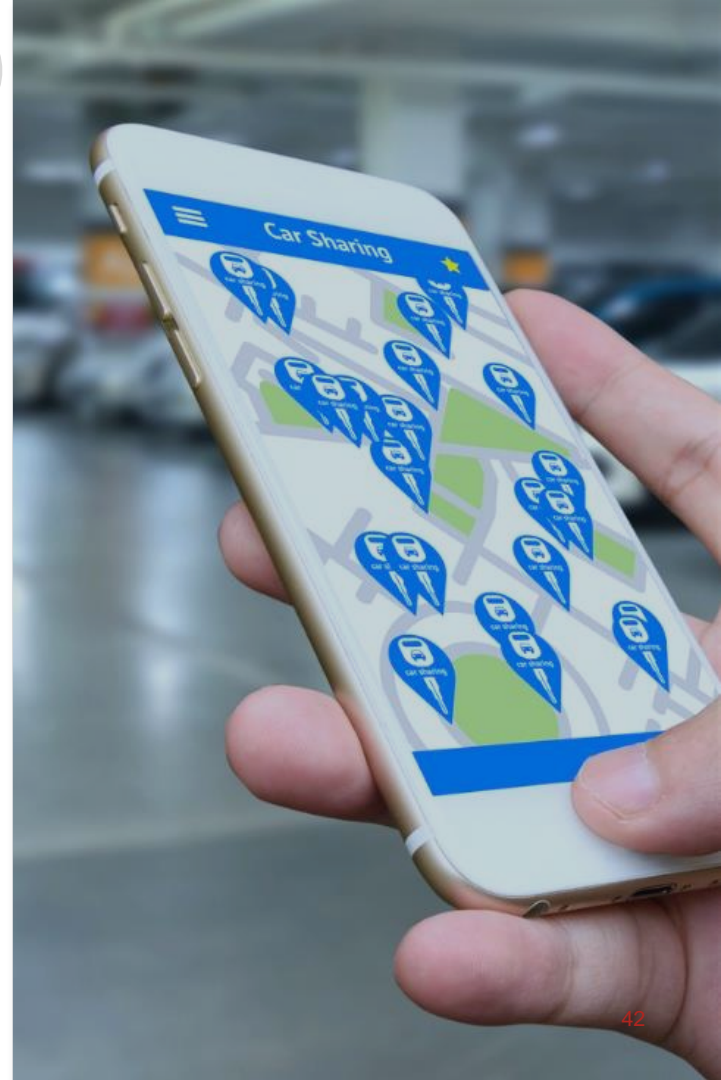
Mobility Services



LeasePlan launches joint private leasing with Lynk & Co across Europe

ALD Automotive | LeasePlan, a leading global sustainable mobility player, in close cooperation with Lynk & Co, the global mobility brand, have developed a comprehensive and competitive private leasing offer across all operating markets in Europe (...)

<https://www.marketscreener.com/quote/stock/ALD-35837978/news/ALD-Automotive-I-LeasePlan-launches-joint-private-leasing-with-Lynk-Co-across-Europe-44842026/>



News on key industry trends

Sustainability



Volkswagen joins European energy market through the Elli division

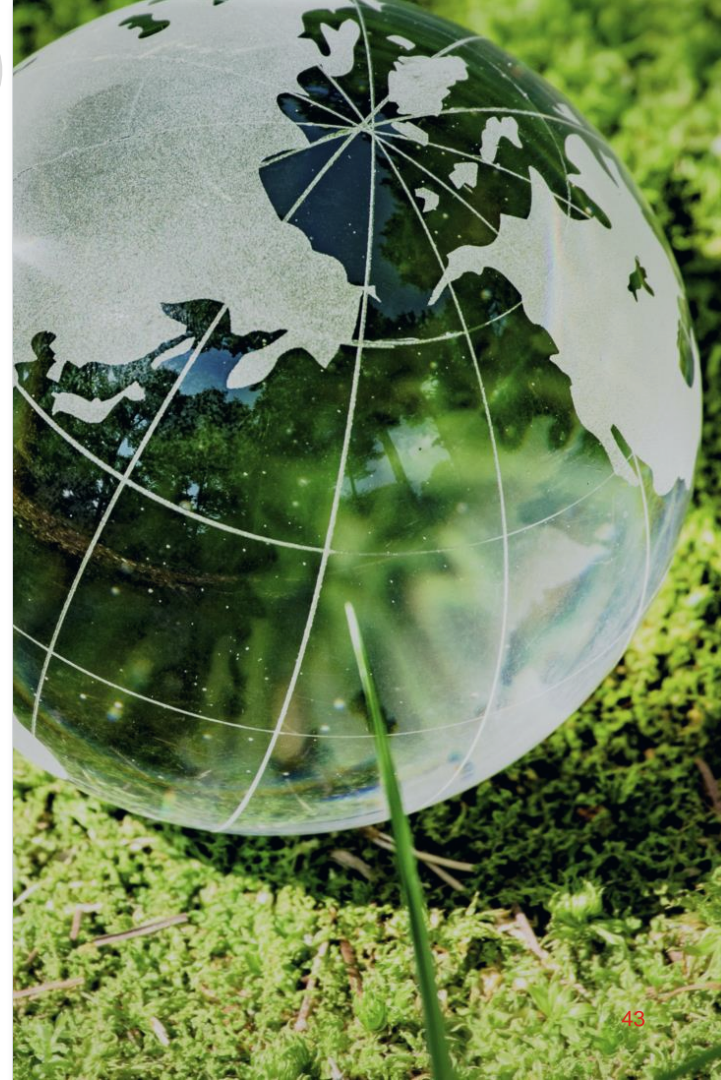
The Group's strategy is to use the batteries of the Volkswagen e-Up! as a storage system and to manage the stored energy through Elli's digital platform: in this way, through its Power Centre, it will be able to exchange and market the stored energy(...)

<https://e-ricarica.it/volkswagen-entra-nel-mercato-europeo-dellenergia-attraverso-la-divisione-elli/>

Toyota Gosei improves truck loading efficiency with the use of AI, reducing CO2 emissions

Toyota Gosei Co., Ltd. has developed a system that automatically calculates truck load volumes to raise transport efficiency during product delivery, and has begun operating this system at its Miyoshi Distribution Center (...)

<https://www.automotiveworld.com/news-releases/toyota-gosei-improves-truck-loading-efficiency-with-the-use-of-ai-reducing-co2-emissions/>



Thank you.

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