BIP AutObserver

Analysis of new car registrations

September 2022

Executive Summary

Analysis of new car registrations in Europe & Italy – September 2022

Europe*

+7,9%

Top Countries by growth of new registrations: 24 countries registered an increase in September 2022 compared to 2021, the highest rates for Bulgaria (+46,4%), Ireland (+42,2%) and Latvia (+39,7%). Considering YTD results only 8 countries grew, double-digit increase for Iceland (+33,2%) and Bulgaria (+15,3%).

Top 3 Countries by market share: Germany 22,6% (+0,6 p.p.), United Kingdom 14,6% (+0,2 p.p.) and France 13,4% (-0,3 p.p.) in September 2022 YTD compared to September 2021 YTD.

Brands: among the **Top 15 by volume**, highest growth in September 2022 respect to September 2021 for Skoda (+41,0%), Mercedes-Benz (+34,8%) and Audi (+26,8%). Considering YTD only Dacia (+16,7%), Kia (+9,8%) Hyundai (+3,2%) and Toyota (+1,0%) registered an increase.

Premium brands: Mercedes-Benz** (+34,8%) and **Audi** (+26,8%) grew in September 2022, while **BMW** recorded a drop (-4,7%). All 3 brands dropped on a YTD base.

Italy

+5,4%

Areas monthly results: North-East +4,5%, North-West +11,7%, Center +9,2%, South -10,6% and Islands -5,0%, comparing September 2022 with September 2021

Customer segments: Retail -6,5%, Fleet +49,1% and Business +2,4% September 2022 vs September 2021. Business segment confirmed the positive trend registered in August 2022.

Brands: among the **Top 15 by volume** Dacia grew YTD (+10,6%) but decreased in September 2022 (-33,8%); all the other brands registered a drop, highest for Jeep (-28,1%) and Renault (-25,5%).

Premium brands: Audi** (+65,8%), **Mercedes-Benz** (+58,2%) and **BMW** (+10,2%) **registered an increase** in September 2022 compared to September 2021. On a YTD perspective BMW, Audi and Mercedes-Benz decreased in line with the overall market (-16,2%, -14,9% and -12,3%).

Source: ACEA; UNRAE

(*) EU (26 Countries) + EFTA Countries (Iceland, Norway, Switzerland) + UK

(**) Considering only Premium brands in the top 15 by volume

01. Europe

- Market overview
- New car registrations by brands

02. Italy

03. Quarterly special topic. EV: towards 2030

04. New car models launches in Italy

05. News on key industry trends

Europe | *Market Overview*

Top 10 European Markets* – September 2022

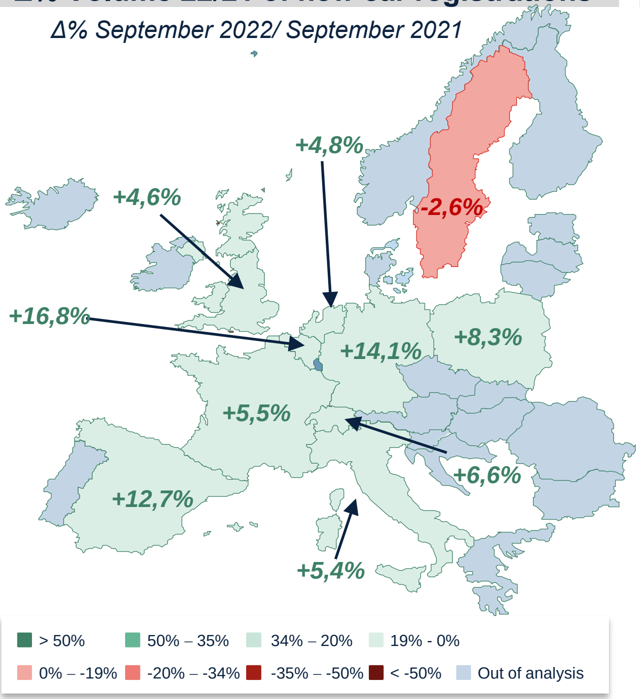
European Markets* new car registrations

2021	972.843
2022	1.049.926

+7,9%

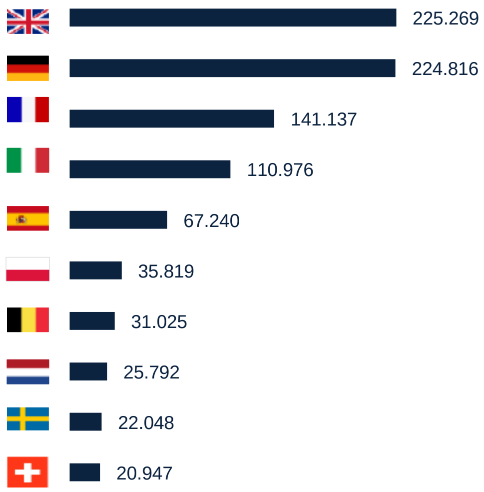
Δ% Volume 22/21 of new car registrations

Δ% September 2022/ September 2021



Number of EU new car registrations 2022

New car registration September 2022



Highlights

- The European market (EU+UK+EFTA) had an increase in **registrations** from 972.843 in September 2021 to 1.049.926 cars in September 2022.
- In line with August 2022, the EU car market confirmed an overall increase in registrations compared to previous months.
  The highest rates among the top 10 markets for:
  - Belgium (+ 16,8%)
  - Germany (+14,1)
  - Spain (+ 12,7%)

Source: ACEA

(*) EU (26 Countries) + EFTA Countries (Iceland, Norway, Switzerland) + UK

Europe | *Market Overview*

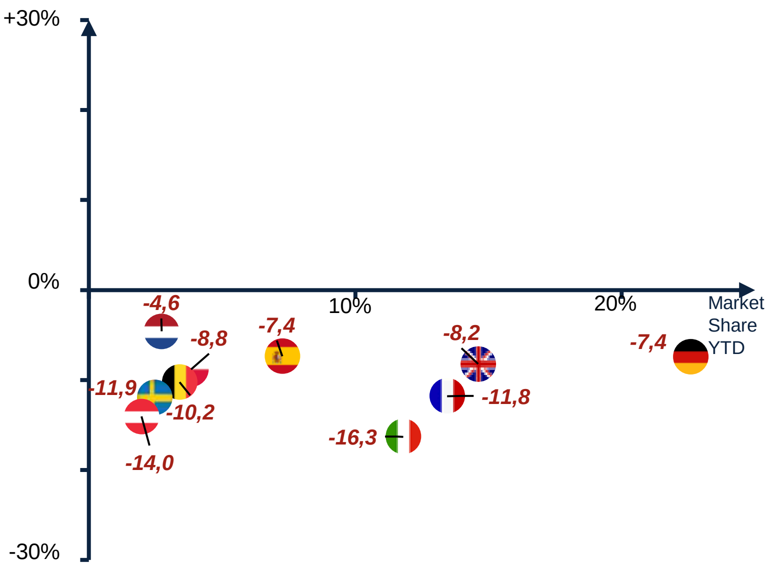
Top 10 European Markets* – September 2022 YTD

European Markets* new car registrations

2021	9.162.177
2022	8.271.115

-9,7%

Highlights - ∆% Volume 22/21 & Market Share (MS)



#	Country	MS Sep 2022 YTD	∆ VS 2021	Sales Volume Sep 2022 YTD
1	GER	22,6%	-7,4%	1.867.885
2	UK	14,6%	-8,2%	1.208.368
3	FRA	13,4%	-11,8%	1.112.067
4	ITA	11,8%	-16,3%	976.055
5	SPA	7,3%	-7,4%	600.281
6	POL	3,8%	-8,8%	316.680
7	BEL	3,4%	-10,2%	281.490
8	NET	2,7%	-4,6%	224.944
9	SWE	2,5%	-11,9%	204.640
10	AUS	2,0%	-14,0%	163.209

Highlights

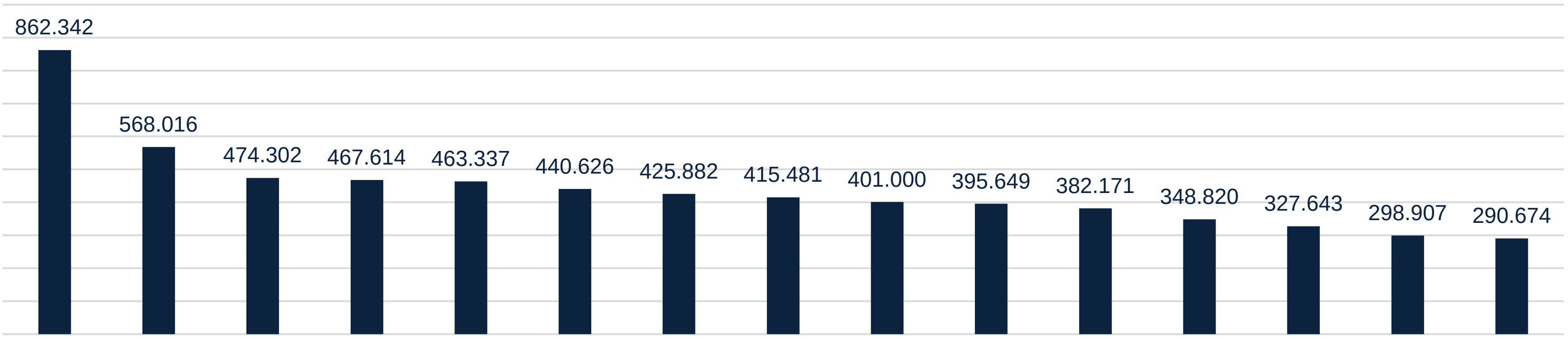
- In 9 months of 2022, **8.271.115 units** were registered in the European passenger cars market, with a **decrease** of -9,7% compared to the same period of 2021.
- An **increase** were registered only for 8 out of 30 countries (highest for Iceland +33,2%), none of them in the top 10 for registrations. 22 countries registered a **decrease;** considering the top 10 double-digit for Italy (-16,3%), Austria (-14,0%), Sweden (-11,9%), France (-11,8%) and Belgium (-10,2%)

Source: ACEA

(*) EU (26 Countries) + EFTA Countries (Iceland, Norway, Switzerland) + UK

Europe | *New car registrations by brand*

Top 15 – September 2022 YTD



Δ Vol. 22/21	-16,9%	+1,0%	-15,1%	-12,3%	-4,1%	-8,4%	+9,8%	-17,9%	-15,3%	+3,2%	-8,8%	+16,7%	-14,4%	-21,1%	-17,2%
MS '22	**10,4%**	**6,9%**	**5,7%**	**5,7%**	**5,6%**	**5,3%**	**5,1%**	**5,0%**	**4,8%**	**4,8%**	**4,6%**	**4,2%**	**4,0%**	**3,6%**	**3,5%**
Δ MS 22/21	-7,92%	+11,86%	-5,94%	-2,89%	+6,20%	+1,45%	+21,68%	-9,11%	-6,23%	+14,34%	+1,04%	+29,23%	-5,21%	-12,55%	-8,27%

Source: ACEA

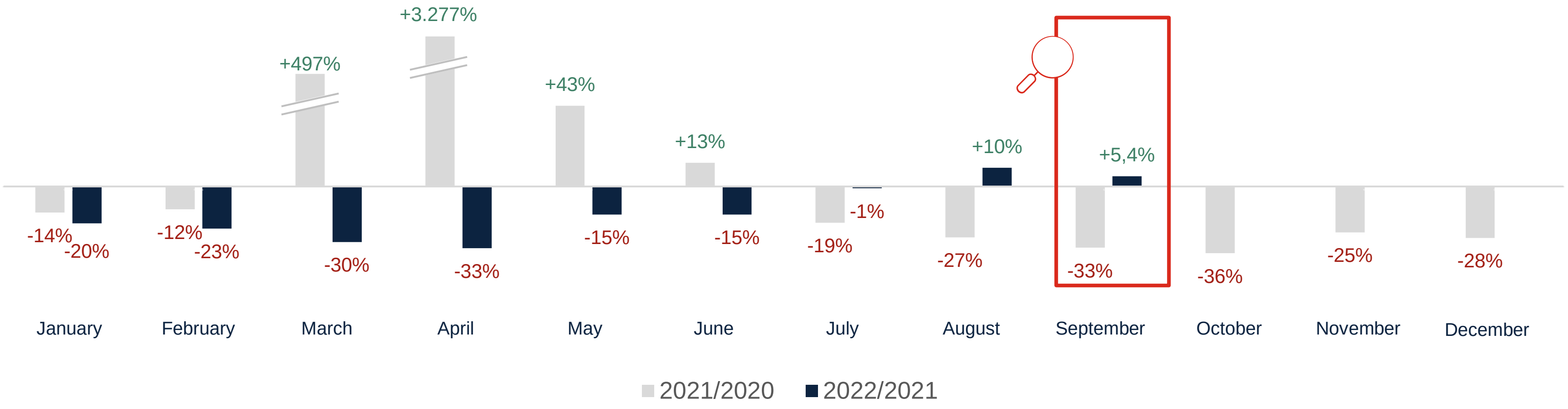
(*) Opel includes Vauxhall New Car Registrations

Italy | *Market Overview*

Italian Market – Variation of new car registrations 2022 vs 2021

September 2022 Highlights

September 2022 is still a **positive** month for the Italian market, **confirming the recovery** that started in July 2022 with a slowdown in the decline, and continued in August 2022 when the Market highlighted double digits growth, interrupting a period of 13 monthly drops. In detail, registrations in September were **110.976**, an increase of **+5,4%** compared to September 2021. However, this is not enough to offset the losses accumulated since the beginning of the year: total registrations in these 9 months were **976.055**, -16,3% compared to September 2021 YTD, with about 190 thousand cars less (all customer segments in decline).
In an overall context still negatively characterized by the Ukraine war and the "shortage" of microchips and raw materials, **incentives** facilitated the recovery, giving a boost to the **fleet segment,** considering the new act that included also rental companies.
In September, considering **geographical areas**, **North** and **Center** confirmed the **increase** of the previous month, while the **South** and the **Islands** still experienced a **decrease**; regarding powertrains **Petrol**, **Diesel grew** while **BEV** and **PHEV** recorded a drop.



Source: UNRAE

Italy | *Market Overview*

Italian Market – September 2022 vs September 2021

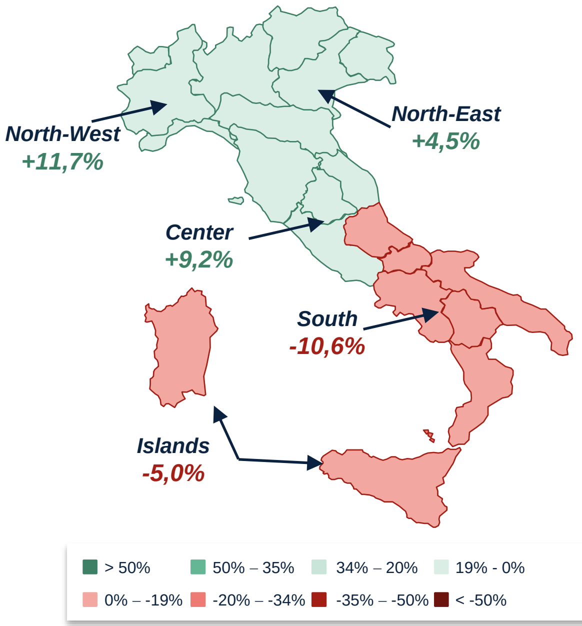
Italy New Car Registrations

2021	105.318
2022	110.976

+5,4%

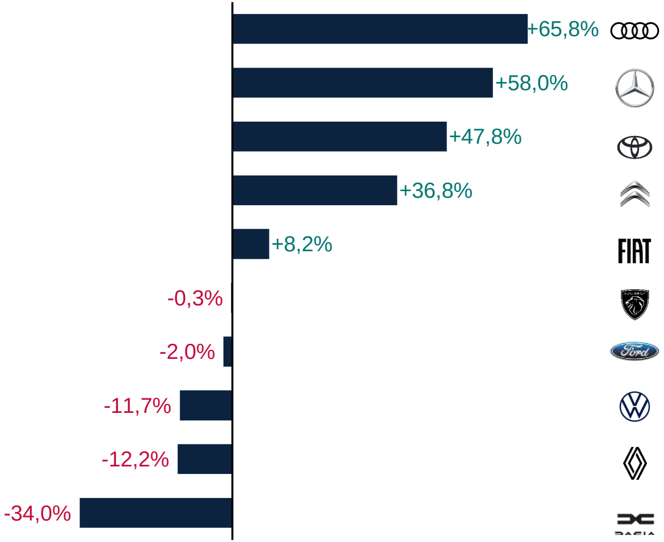
Δ% Volume 22/21 of New Car Registrations

Δ% September 2022/ September 2021



Growth of Top 10 Brands by Volumes

Δ% September 2022/ September 2021



Highlights

- In **September 2022**, the Italian market still recorded (in line with August 2022) a **positive sign** with an **increase** of **+5,4%** over September 2021.
- **High growth** for **premium brands** as **Audi** (+65.8%) and **Mercedes-Benz** (+58,0%), followed by significant increases for **Toyota** (+47,8%), **Citroën** (+36,8%) and **Fiat** (+8.2%). Considering the top 10 brands by volumes, 5 out of 10 registered a **decrease**, with **worst performance** for **Dacia** (-34,0%), **Renault** (-12,2%) and **Volkswagen** (-11,7%).

Source: UNRAE

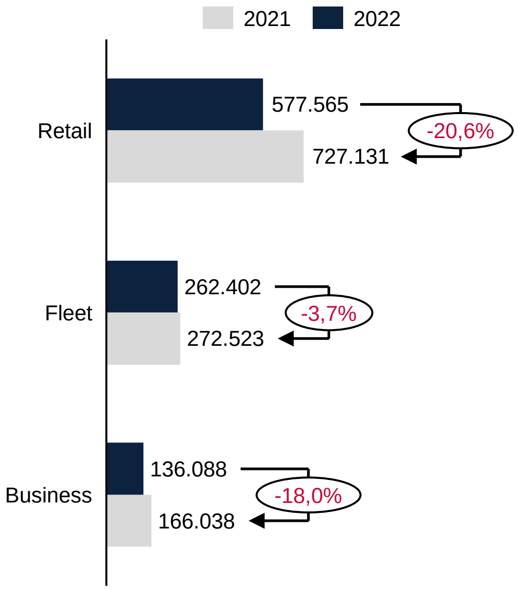
Italy | *Market Overview*

Italian Market – September 2022 YTD vs September 2021 YTD

Italy New Car Registrations (YTD)			
	2021	1.165.692	-16,3%
	2022	976.055	

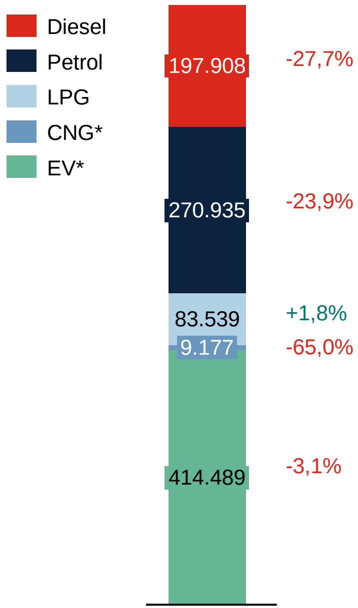
Analysis by "Customer Segment"

Registration YTD '22/'21



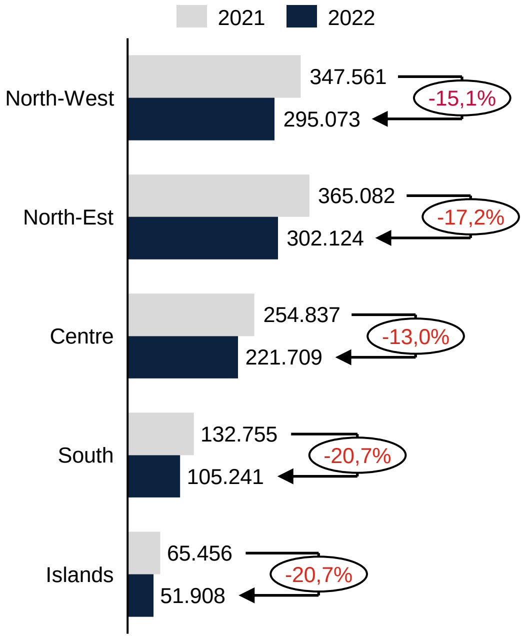
Analysis by "Fuel Type"

Registration YTD '22



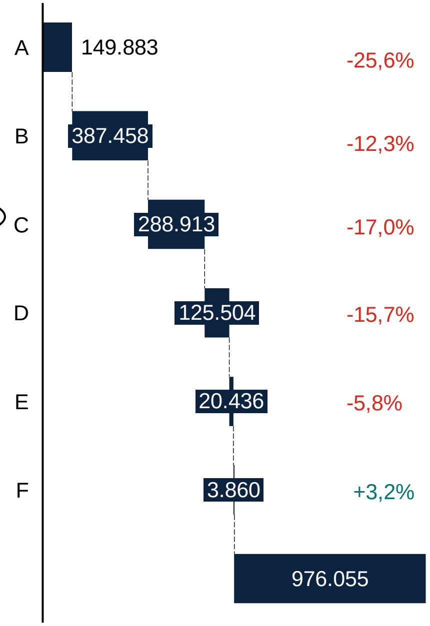
Analysis by "Geographical Area"

Registration YTD '22/'21



Analysis by "Car Segment"

Registration YTD '22/'21



Source: UNRAE

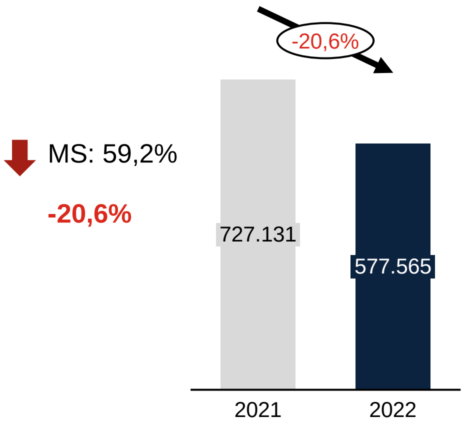
(*) EV: Electric Vehicle (Hybrid and Electric); CNG: Compressed Natural Gas (Methane and Ethanol)

Italy | *Market Highlights*

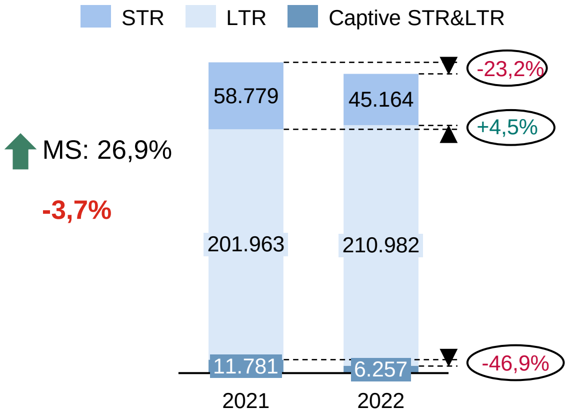
Italian Market – Distribution channels – September 2022 YTD vs September 2021 YTD

Italy New Car Registrations (YTD)			
	2021	1.165.692	-16,3%
	2022	976.055	

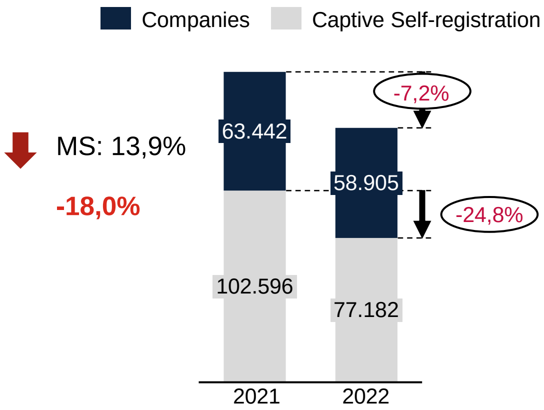
Retail (Private Customers)



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



Business (Company registrations**)



- Compared to **September 2021 YTD**, the **Retail** segment of the Italian market confirmed the 2022 trend with -20,6% (-149.566 units sold lost) and a further decrease in its YTD Market Share with respect to September 2021 (59,2% in September 2022 vs. 62,4% in September 2021, - 3,2 p.p.)

- **Captive LTR&STR** (-46,9%) and **STR** (-23,2%) decreased in **September 2022 vs. 2021 YTD,** while **LTR** (+4,5%) registered a slight increase. The **Market share** of **Captive LTR&SRT** (0,6% in September 2022 YTD vs 1,0% in September 2021 YTD) and **SRT** (4,6% in 2022 vs 5,0% in 2021) also decreased, while **LTR** market share increased from 17,3% in September 2021 YTD to 21,6% in September 2022 YTD

- The decrease of the **Business segment** registrations in **September 2022** vs. **September 2021 YTD** was related **both** to the reduction of **Captive self-registrations** (-24,8% or 25.413 units less sold) and **Companies** registrations (-7,2% or 4.537 units less sold)

Market Share YTD increase / decrease September 2022 / September 2021 (YTD)

∆% Volume September 2022 / September 2021 (YTD)

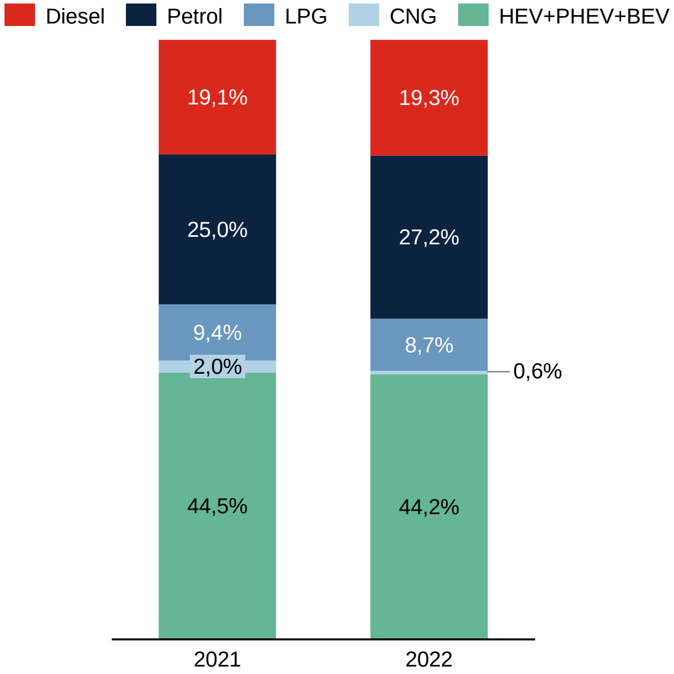
Source: UNRAE

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

Italy | *Market Highlights*

Italian Market – September 2022 vs September 2021

"Fuel Type" mix evolution (Market Share)



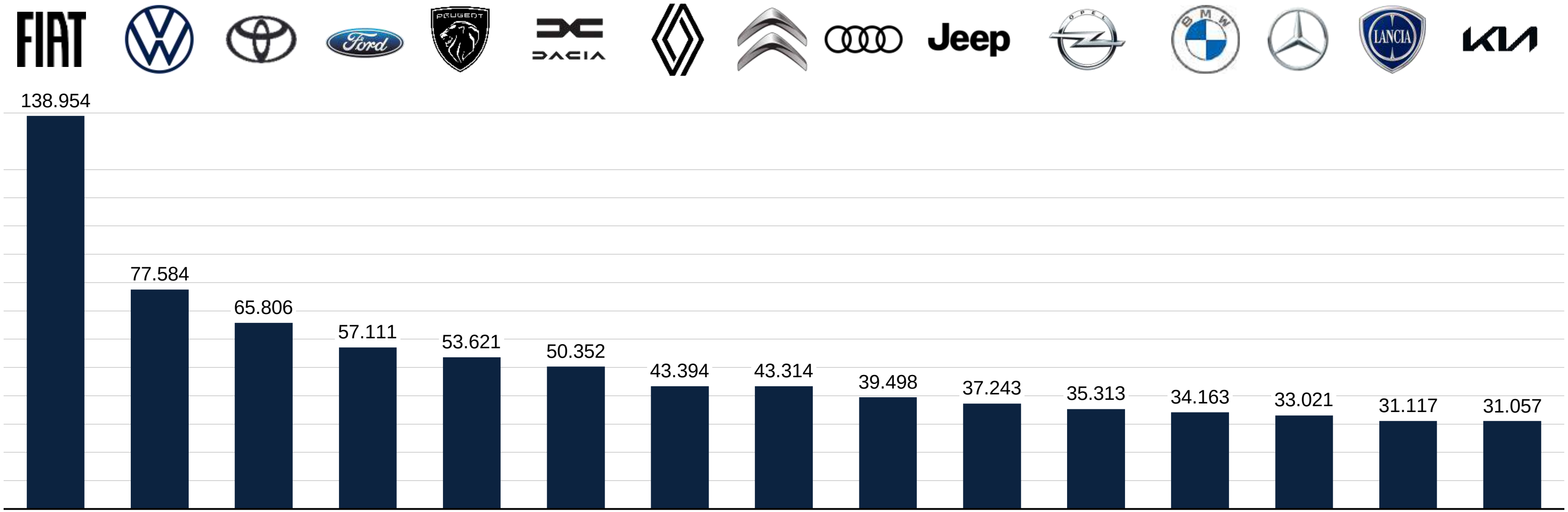
	HEV	PHEV	BEV
MS September '21	31,3%	5,2%	8,0%
MS September '22	35,7%	4,0%	4,5%
MS Delta September '22 vs. '21	+4,4 p.p.	-1,2 p.p.	-3,5 p.p.

- **Unlike the previous months, the Market share of EVs slightly decreased,** with Petrol and Diesel regained Market Share (+0,2 p.p. and +2,2 p.p. respectively in September 2022 compared to 2021)
- **EVs decreased** their market share from 44,5% up to 44,2%, however, the EV trend is driven mainly by **mild hybrid vehicles** (HEVs), as a result of the incentives allocated by the government, while PHEVs and BEVs decreased their Market Share, -1,2 p.p. and -3,5 p.p. respectively

Source: UNRAE

Italy | *New car registrations by brand*

New car registrations by brand – September 2022 YTD (1/3)

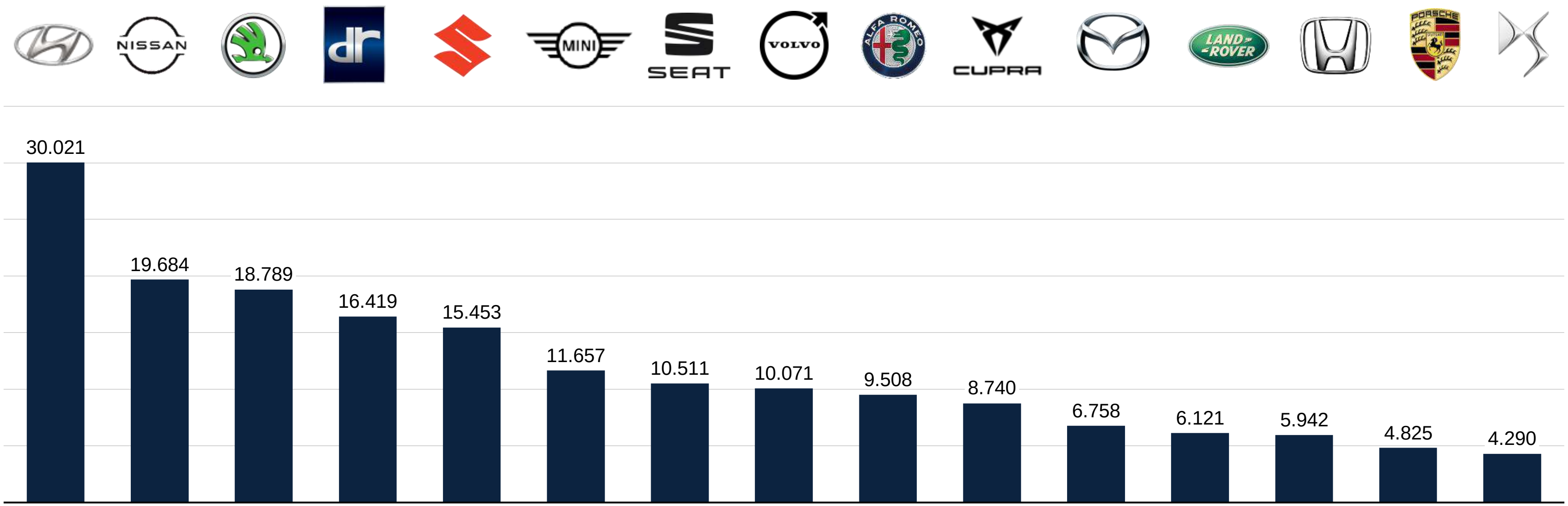


Δ Vol. 22/21	-21,80%	-24,06%	-1,18%	-15,94%	-23,12%	+10,64%	-25,46%	-19,56%	-14,96%	-28,18%	-22,38%	-16,23%	-12,35%	-11,72%	-8,46%
M.S. '22	**14,24%**	**7,95%**	**6,74%**	**5,85%**	**5,49%**	**5,16%**	**4,45%**	**4,44%**	**4,05%**	**3,82%**	**3,62%**	**3,50%**	**3,38%**	**3,19%**	**3,18%**
Δ M.S. 22/21	-6,56%	-9,25%	+18,04%	+0,34%	-8,19%	+32,31%	-10,82%	-3,90%	+1,76%	-14,16%	-7,18%	+0,00%	+4,64%	+5,63%	+9,28%

Source: UNRAE

Italy | *New car registrations by brand*

New car registrations by brand – September 2022 YTD (2/3)

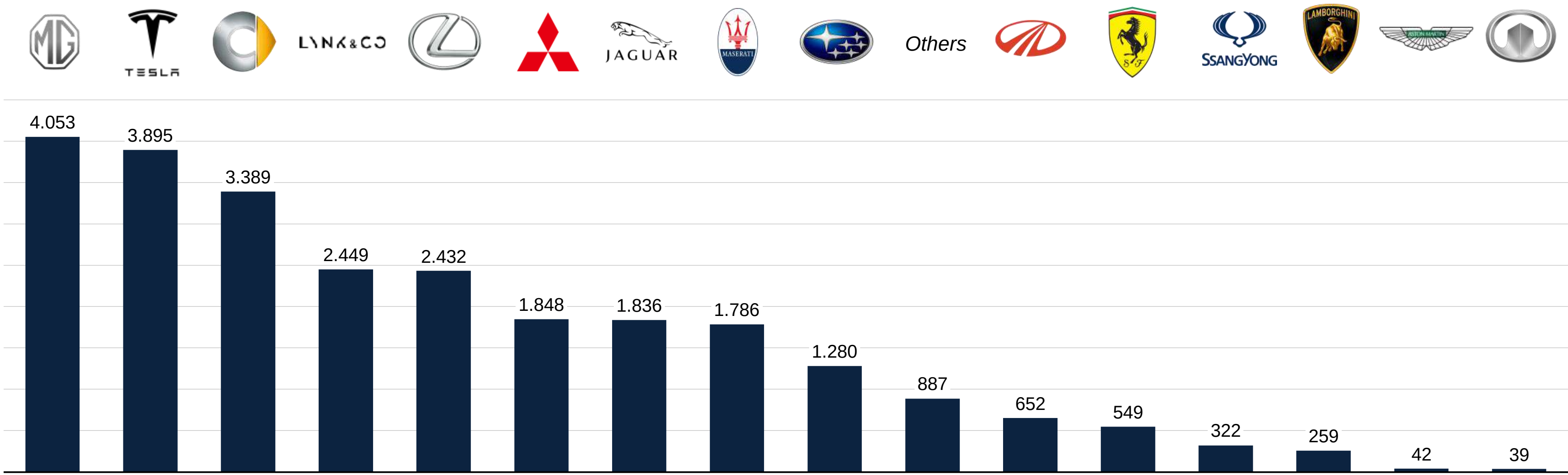


∆ Vol. 22/21	-12,78%	-6,53%	-12,27%	+198,31%	-51,62%	-14,05%	-40,13%	-33,41%	+10,30%	+94,27%	-30,81%	-37,69%	+22,82%	+17,28%	+22,22%
M.S. '22	3,08%	2,02%	1,92%	1,68%	1,58%	1,19%	1,08%	1,03%	0,97%	0,90%	0,69%	0,63%	0,61%	0,49%	0,44%
∆ M.S. 22/21	+4,41%	+11,60%	+4,35%	+257,45%	-42,34%	+2,59%	-28,48%	-20,77%	+31,08%	+130,77%	-17,86%	-25,00%	+45,24%	+40,00%	+46,67%

Source: UNRAE

Italy | *New car registrations by brand*

New car registrations by brand – September 2022 YTD (3/3)



Δ Vol. 22/21	-	-20,25%	-33,50%	-	-30,77%	-42,77%	-47,07%	+42,54%	-25,06%	+168,80%	-7,12%	+16,81%	-51,06%	+2,78%	+10,53%	-94,05%
M.S. '22	**0,42%**	**0,40%**	**0,35%**	**0,25%**	**0,25%**	**0,19%**	**0,19%**	**0,18%**	**0,13%**	**0,09%**	**0,07%**	**0,06%**	**0,03%**	**0,03%**	**0,00%**	**0,00%**
Δ M.S. 22/21	+2000,00%	-4,76%	-20,45%	+1150,00%	-16,67%	-32,14%	-36,67%	+63,64%	-13,33%	+200,00%	+16,67%	+50,00%	-50,00%	+50,00%	-	-100,00%

Source: UNRAE

Italy | *New car registrations by group*

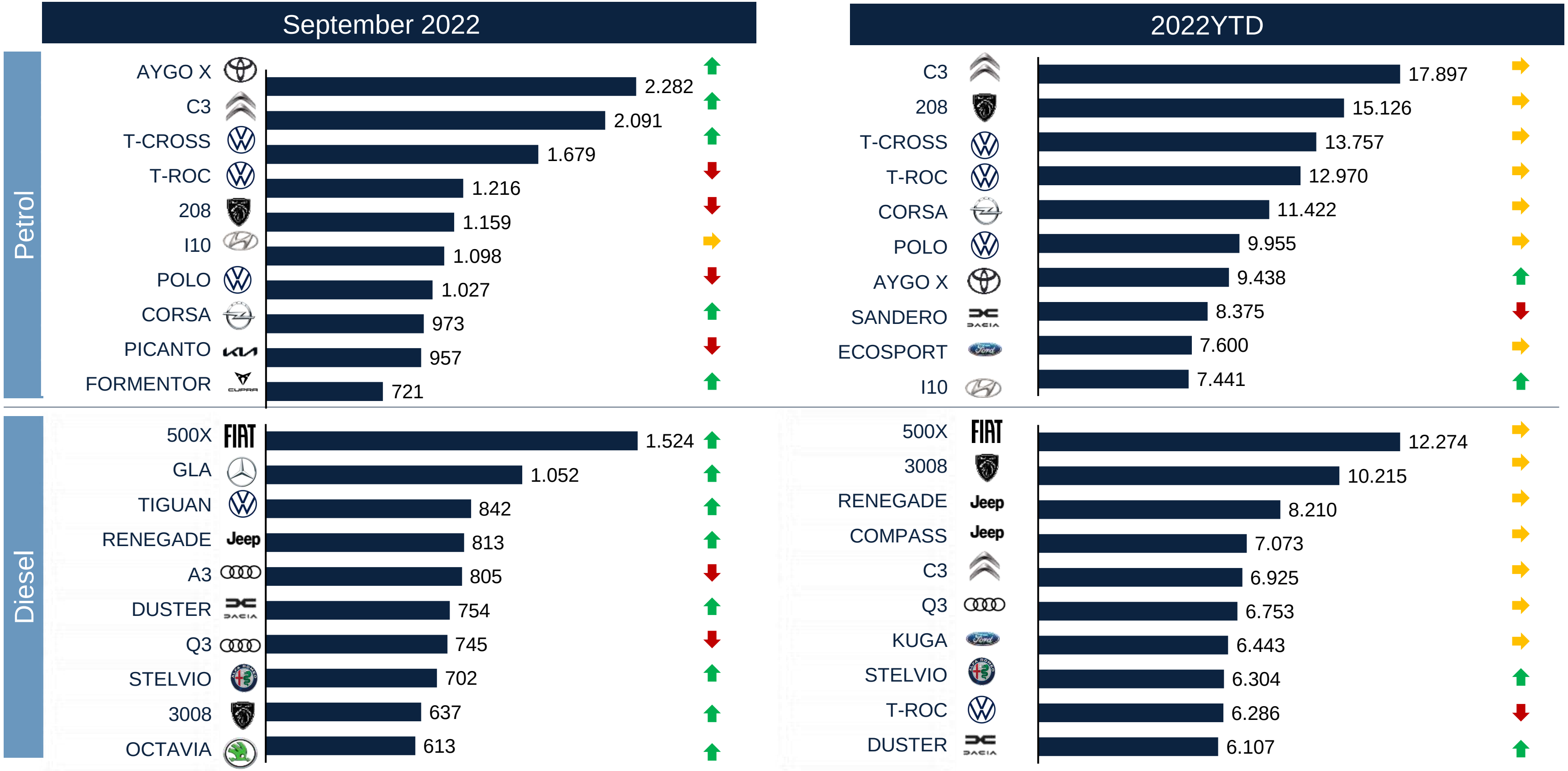
New car registrations by group – Top 15 – September 2022 YTD

#	Group	Brand	Volume	∆% Volume '22 vs '21	Market Share (%)
1	Stellantis	FIAT, Jeep	355.146	-20,6%	36,4%
2	Volkswagen	SEAT, CUPRA	155.381	-19,2%	15,9%
3	Renault	DACIA	93.746	-9,6%	9,6%
4	Toyota		68.238	-2,7%	7,0%
5	Ford	Ford	57.111	-15,9%	5,9%
					Top 5: 74,8%
6	BMW	MINI	45.820	-15,7%	4,7%
7	Mercedes-Benz		36.410	-14,9%	3,7%
8	Kia	KIA	31.057	-8,5%	3,2%
9	Hyundai		30.021	-12,8%	3,1%
10	Nissan	NISSAN	19.684	-6,5%	2,0%
					Top 10: 91,5%
11	DR Motor	dr	15.453	-51,6%	1,6%
12	Suzuki		16.419	198,3%	1,7%
13	Volvo	VOLVO	10.071	-33,4%	1,0%
14	Jaguar – L.R.	JAGUAR, LAND-ROVER	7.957	-40,1%	0,8%
15	Mazda		6.758	-30,8%	0,7%

Source: UNRAE

Italy | *New car registrations by fuel type*

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

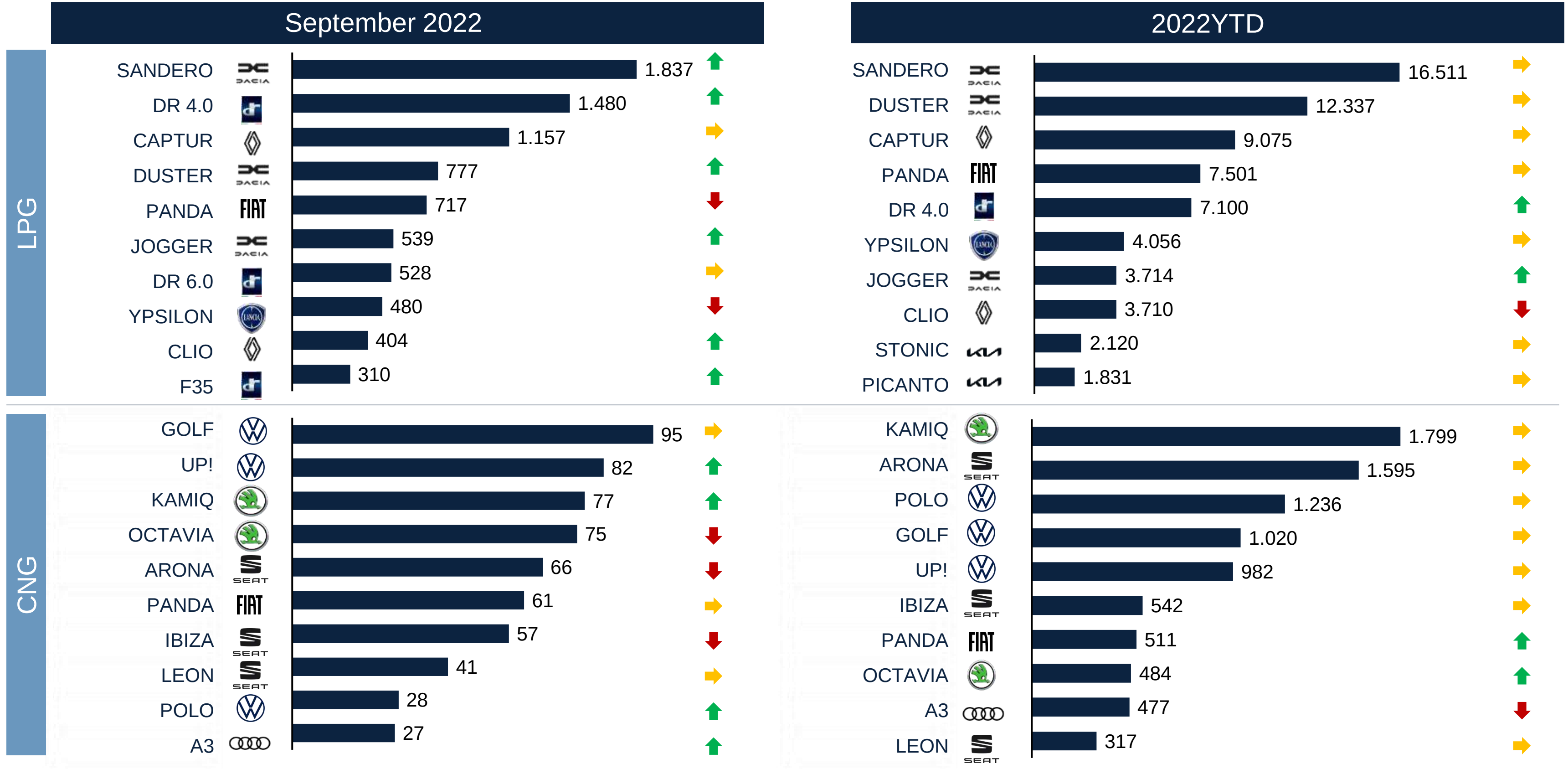


Source: UNRAE

Ranking variation compared to previous period

Italy | *New car registrations by fuel type*

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

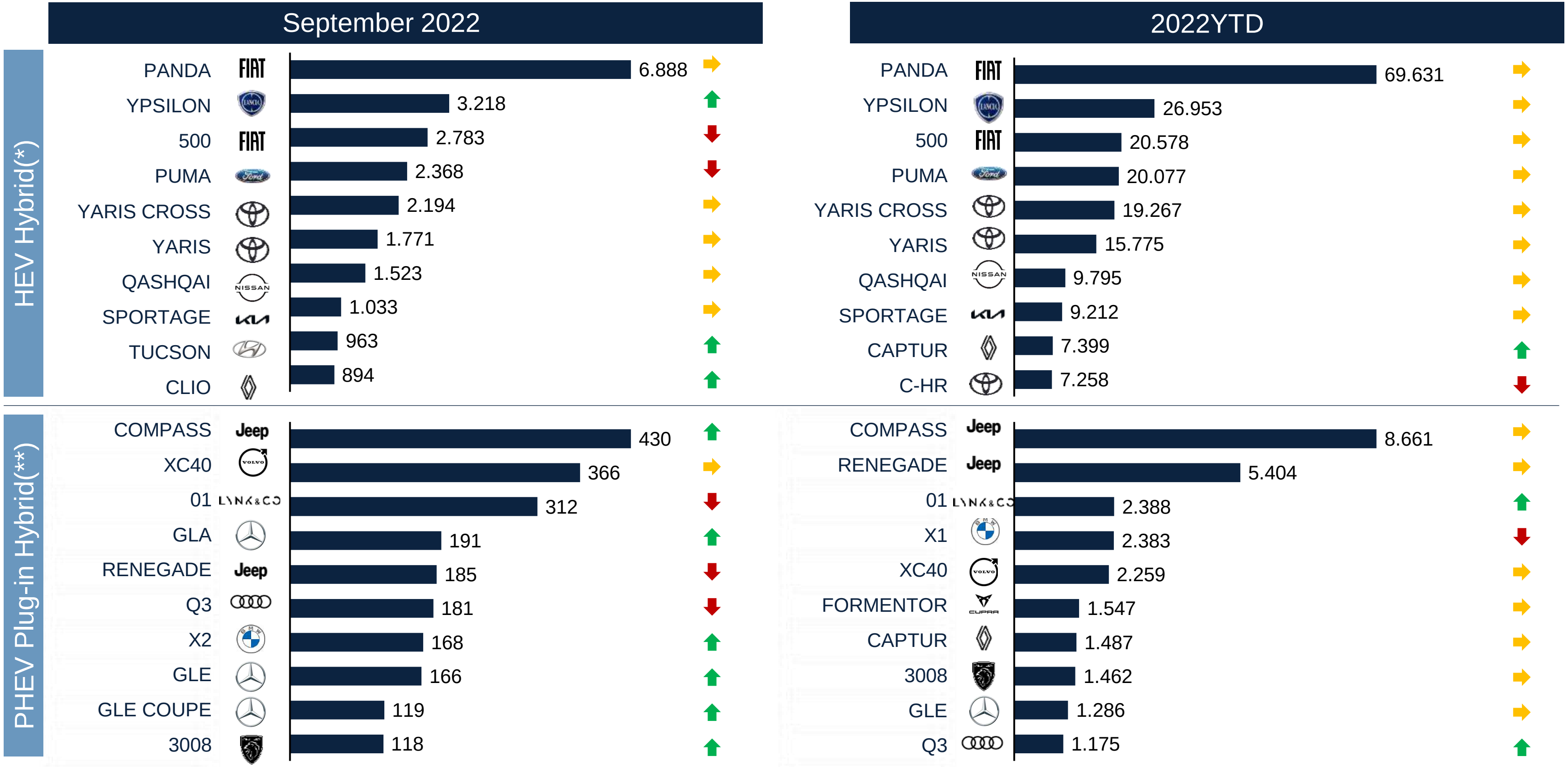


Source: UNRAE

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)



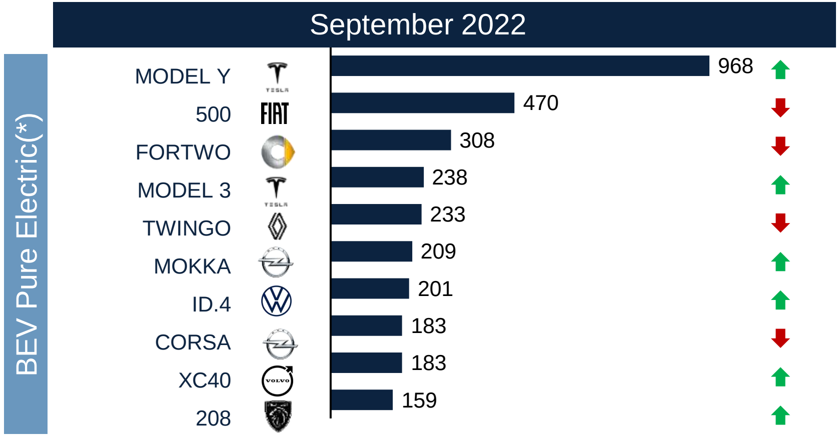
Source: UNRAE

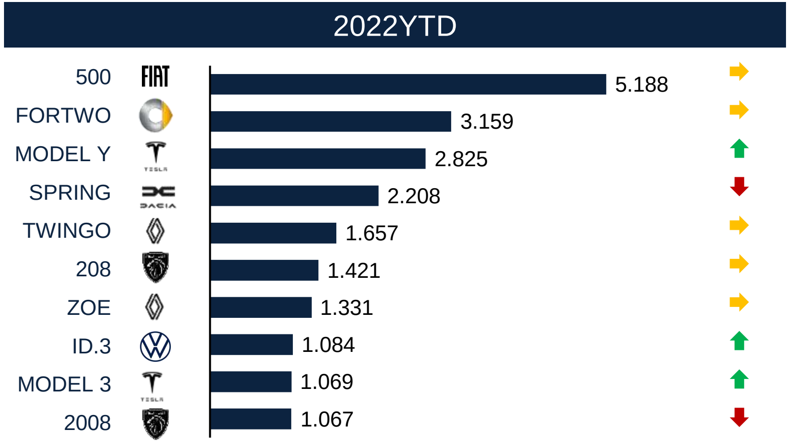
(*) Hybrid Electric Vehicle (HEV), (**) Plug-in Hybrid Electric Vehicle (PHEV)

Ranking variation compared to previous period

Italy | *New car registrations by fuel type*

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





Source: UNRAE

(*) Battery Electric Vehicle (BEV)

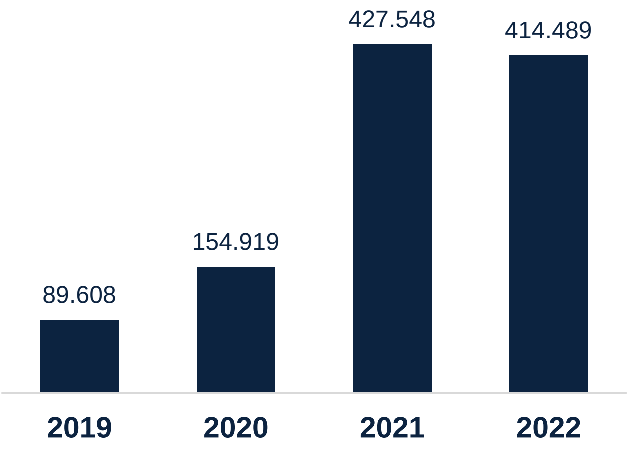
Ranking variation compared to previous period

Italy | *New car registrations by fuel type*

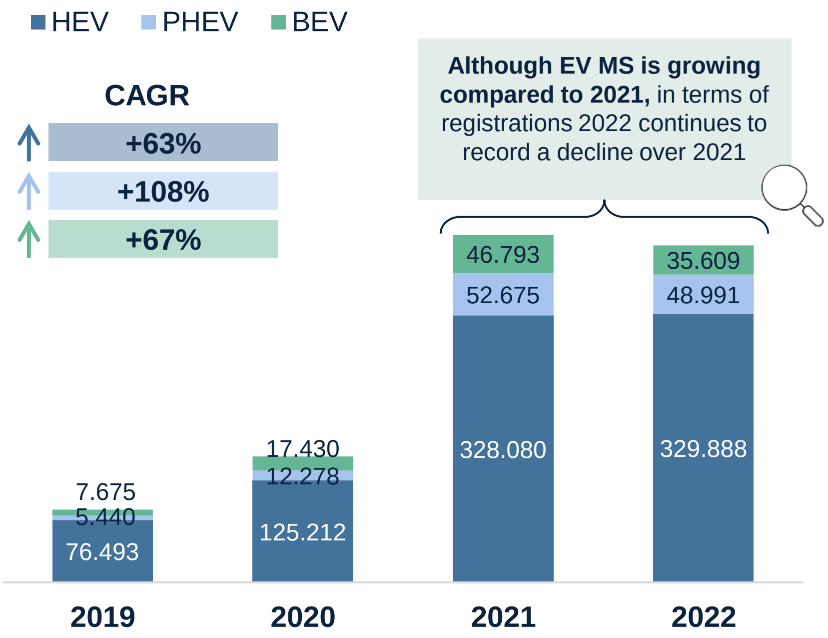
New car registrations of Hybrid vs Pure Electric vehicles

EV Registrations Trend August '22 YTD

	2019	2020	2021	2022
Delta YoY	*+32%*	*+73%*	*+176%*	*-3%*
M.S.	6%	16%	37%	42%



HEV*, PHEV* and BEV** Vehicles Trend August '22 YTD



Source: UNRAE

(*) HEV = Hybrid Electric Vehicles; PHEV = Plug-in Hybrid Electric Vehicles; (**) BEV = Pure Electric

Italy | *New car registrations by segment*

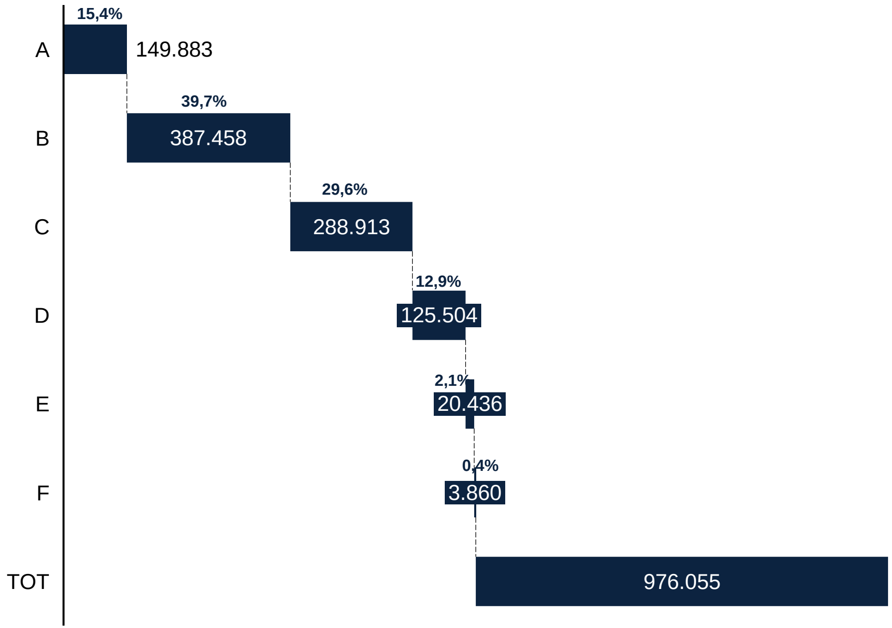
Overview of new car registrations by segment

Segments Growth in Market Share*

A	B	C
«Utility/City»	«Supermini»	«Medium»
-1,9 *p.p.*	+1,8 *p.p.*	-0,3 *p.p.*

D	E	F
«Executive»	«Luxury»	«Ultra Luxury»
+0,1 *p.p.*	+0,2 *p.p.*	+0,1 *p.p.*

Market Share and Volume**



Source: UNRAE

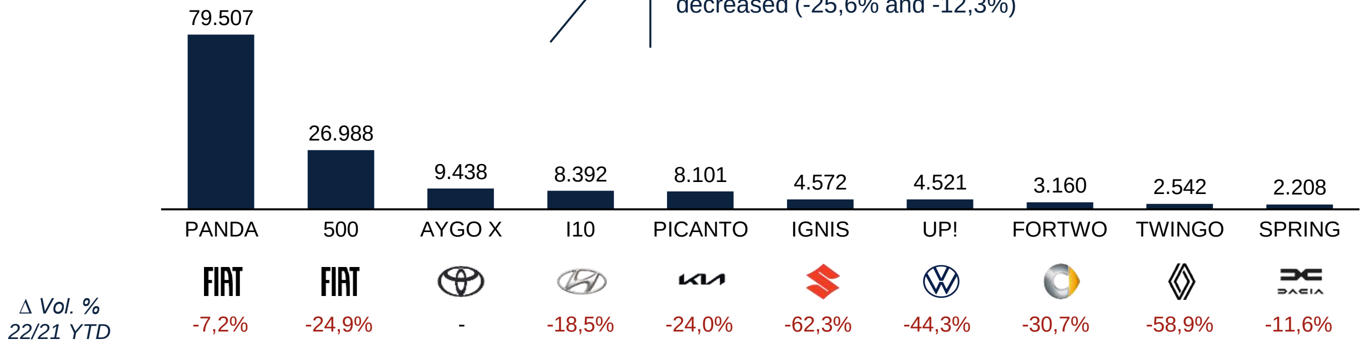
(*) Δ% September 2022 YTD / September 2021 YTD; ** Market Share and Volume September 2022 YTD

Italy | *New car registrations by segment*

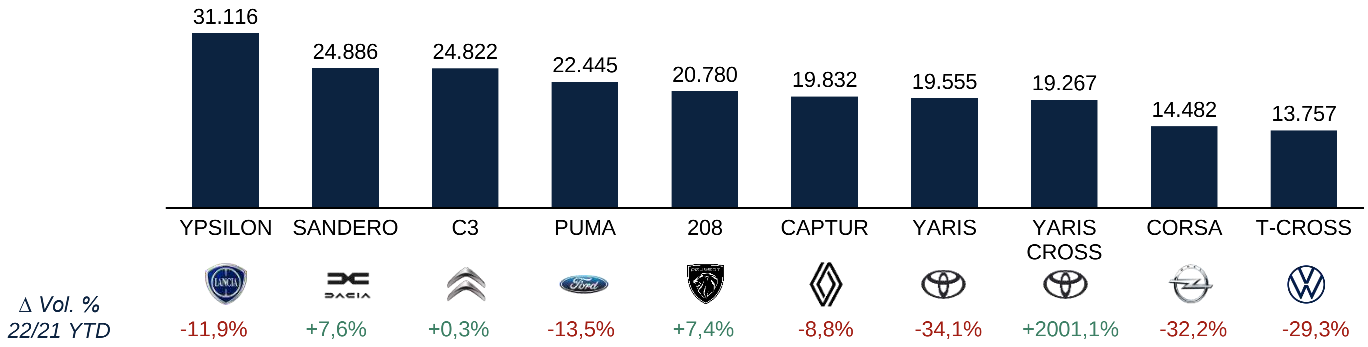
Segment A and Segment B – Top 10 – September 2022 YTD

In terms of **MS**, respectively vs September 2021 YTD, **Segment A** registered a decrease (-1,9 p.p.) while **Segment B** recorded an increase (+1,8 p.p.) vs. September YTD 2021. Considering the volumes, in September 2022 YTD both **Segment A** and **Segment B** decreased (-25,6% and -12,3%)

A
"Utility/City"



B
"Supermini"



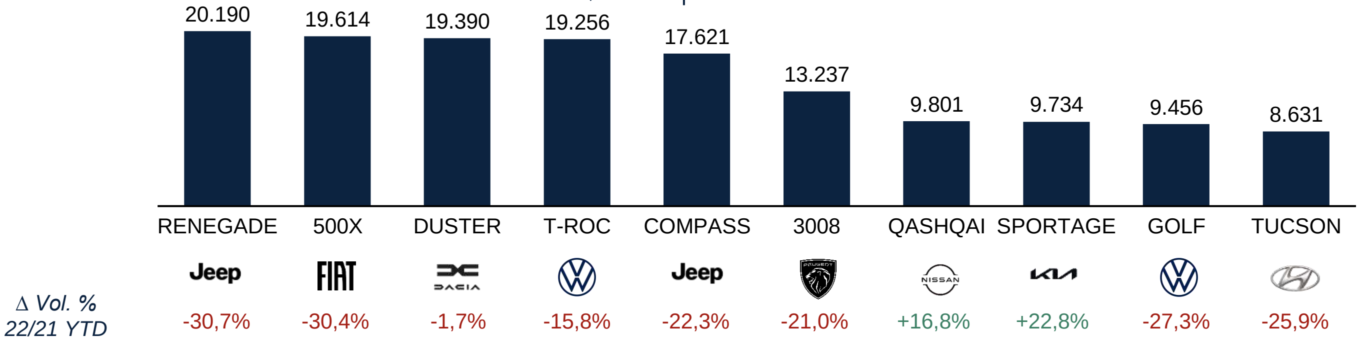
Source: UNRAE

Italy | *New car registrations by segment*

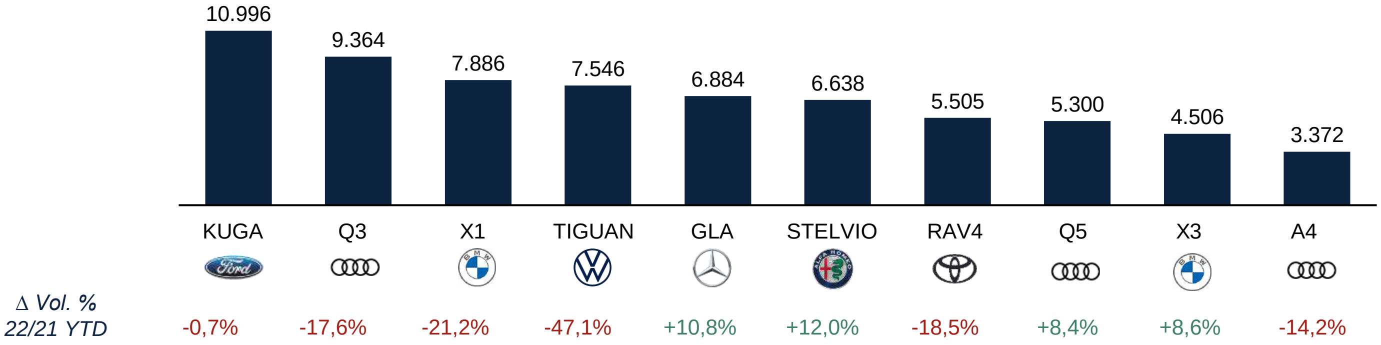
Segment C and Segment D – Top 10 – September 2022 YTD

In terms of **MS**, respectively vs September 2021 YTD, **Segment C** registered a decrease (-0,3 p.p.) while **Segment D** recorded an increase (+0,1 p.p.). Considering the volumes, in September 2022 YTD both **Segment C** and **Segment D** decreased vs. September 2021 (-17% and -15,7% respectively)

C
"Medium"



D
"Executive"



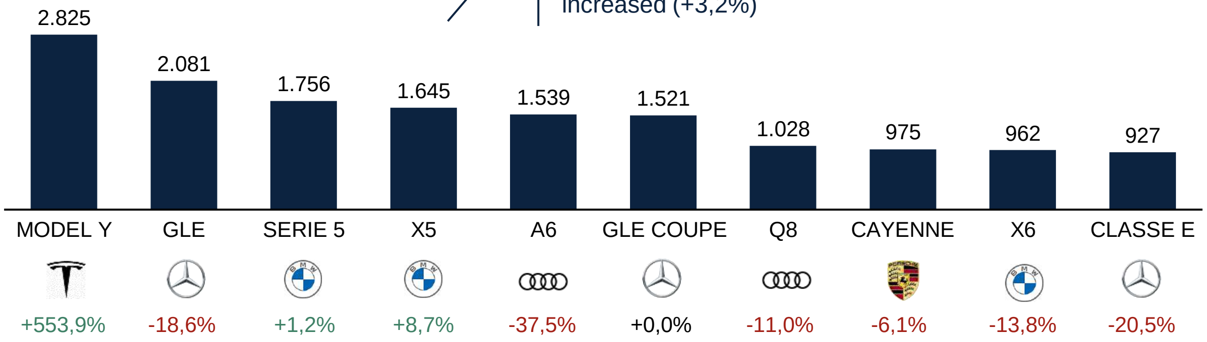
Source: UNRAE

Italy | *New car registrations by segment*

Segment E and Segment F – Top 10 – September 2022 YTD

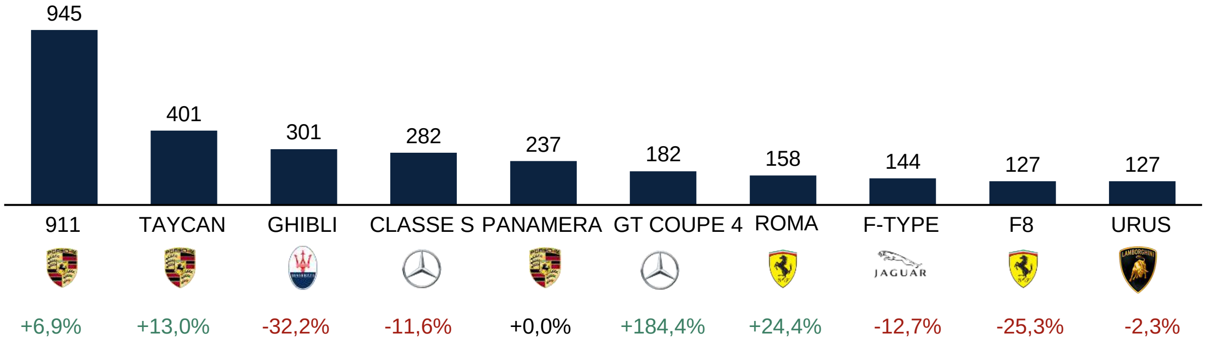
In terms of **MS**, respectively vs September 2021 YTD, **Segment E Segment F** both registered an increase (+0,2 p.p. and +0,1 p.p.). In terms of volumes, in September 2022 YTD **Segment E** decreased vs. September YTD 2021 (-5,8%) while **Segment F** increased (+3,2%)

E
“Luxury”



Δ Vol. % 22/21 YTD

F
“Ultra Luxury”



Δ Vol. % 22/21 YTD

Source: UNRAE

EV: towards 2030 | *Main findings*

BIP has carried out an analysis on 2030 EV outlook, both in terms of required public charging infrastructure and of related energy consumptions increase. Some key findings can be highlighted

Public charging infrastructure

- Charging infrastructure development could follow **two opposite directions**:
  - **Demand-driving**: high capillarity, 1 charging point per 7 EV* (as requested by ACEA), in order to stimulate the EV penetration
  - **Financial sustainability**: high charging infrastructure utilization, 1 charging point per 32 EV (in line with 2021 Norway situation, the only market currently in maturity stage), in order to assure a proper return of investment to CPOs
- **2030 target public charging infrastructure** could vary significantly, the range between the two scenarios is extremely wide:
  - **Europe****: **from ~1,9 Mln charging points** (financial sustainability scenario) **to more than 8,5 Mln charging points** (demand-driving scenario)
  - **Italy**: **from ~188 K charging points to more than 800 K charging points**
- Regarding targets realistically achievable by **Europe**, **CPOs plans** communicated to date **can almost cover the lower range (1,9 Mln)**
- **Italy** seems to be further behind, with **CPOs plans** able to **cover ~70% of the lower range** (131 K charging points implemented/planned on 188 K minimum requested)

Energy consumption

- Looking at 2030 and beyond, the impact of EV energy consumptions is very different for **Italy** compared to Europe because of the **yearly consumption pro-capita significantly lower than European average** (~5 MWh vs ~23 MWh)
- **By 2030** ~18% of European vehicles in circulation are expected to be BEV+PHEV, while in Italy ~14%. This will cause an **increase of energy consumption**, however **still limited** and estimated in less than 1% for Europe and less than 3% for Italy
- **A relevant impact is expected beyond 2030**, when the focus on full electric vehicles will boost (only zero emissions car sales after 2035). In fact, in a **scenario of 50% vehicles in circulation full electric energy consumptions increase** are expected to be **3% for Europe** and **12% for Italy** and, in a theoretical scenario of **100% of BEVs**, **6% for Europe** and **23% for Italy**
- This impact could be lowered only by the technological evolution of products and, in particular, by the improvement of battery efficiency

For further details on our analysis please contact:
fabrizio.arena@mail-bip.com; massimiliano.tortorella@mail-bip.com

(*) BEV+PHEV

(**) EU-27 + EFTA Countries (Iceland, Norway, Switzerland) + UK

Source: BIP analysis on EAFO, ACEA, Motus-E, PNIEC, CPOs communicated plans; Eurostat and Terna

EV: towards 2030 | *Key questions*

Our analysis results bring out key questions that the institutions and players involved in the e-mobility ecosystem will have to answer in the coming years

?

*How is it necessary to intervene to **further stimulate charging infrastructure development plans** in order to significantly sustain the penetration of electric vehicles?*

*The technological obsolescence and evolution will also concern charging infrastructures, how will CPOs manage the development of the changing infrastructure and at the same time the **technological adaptation**?*

*How will the **growing electricity need** of electric vehicles be **covered and at which cost**?*

*Will the related European and national **energy plans** be sufficiently oriented on **alternative / renewable sources** to guarantee a real reduction of emissions along the entire cycle, from energy production to vehicle utilization?*

*How will the **capacity of the energy network** have to be sized to effectively **manage demand peaks** in each relevant area (e.g., metropolitan areas) related to EVs recharges?*

*Will the **evolution of electric vehicles** (and their batteries) be able to significantly **reduce electricity consumption**?*

For further details on our analysis please contact:
fabrizio.arena@mail-bip.com; massimiliano.tortorella@mail-bip.com

New Car Models Launches in Italy

New models launch per brand – Roadmap 2022 (1/3)

	A			B		C		D		F			H
	Alfa Romeo	Aston Martin	Audi	BMW	Citroën	CUPRA	DACIA	dr	DS	Ferrari	FIAT	Ford	Honda	Hyundai
Jan				✓ Serie 2 Coupè								✓ Fiesta		
Feb			✓ A8	✓ Serie 2 Active T		✓ Born		✓ 5.0		✓ 812 Competizione			✓ HR-V	
Mar					✓ C5 Aircross		✓ Jogger			✓ 296 GTB	✓ Tipo Cross SW	✓ Focus		
Apr														
May														
Jun	✓ Tonale													
Jul														
Aug														
Sep				✓ X1										
Oct				X7 ➡					✓ DS7 Crossback			Ranger	Civic ➡	
Nov		DBX Hybrid ➡		M2							Panda ➡			Ioniq 5 77Kwh ➡
Dec		DBX707	Q6 e-tron	iX1										Ioniq 6

✓ Launch Concluded
➡ Launch Postponed
⬅ Launch Anticipated

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

Source: Quattroruote, Motor1

New Car Models Launches in Italy

New models launch per brand – Roadmap 2022 (2/3)

	Infiniti	Jaguar	Jeep	Kia	Lamborghini	Lancia	Land Rover	Lexus	Maserati	Mazda	Mercedes	Mini	Mitsubishi	Nissan
	I	J	J	K	L	L	L	L	L	M	M	M	M	N
Jan				✓ Sportage						✓ Mazda 2	✓ EQB			
Feb		✓ I-Pace						✓ NX						
Mar							✓ Range Rover			✓ Mazda 2 Hybrid				
Apr										✓ CX-60	✓ SL			
May			✓ Renegade								✓ EQE			
Jun			✓ Cherokee 4xe					✓ RX	✓ Grecale					✓ ← Qashqai E-power
Jul														✓ Ariya
Aug														
Sep											✓ AMG GT 63 S E			✓ X-Trail →
Oct								✓ RZ			✓ GLC			
Nov					Aventador							Countryman		
Dec					Urus Evo →									

✓ Launch Concluded
→ Launch Postponed
← Launch Anticipated

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

Source: Quattroruote, Motor1

New Car Models Launches in Italy

New models launch per brand – Roadmap 2022 (3/3)

	O	P		R	S						T		V	
					SEAT			SSANGYONG			TESLA			VOLVO
Jan										S-Cross ✓			ID 5 ✓	
Feb	Astra ✓	308 SW ✓	Macan T ✓	Mègane E-Tech ✓					Forester ✓			Aygo X ✓	Taigo ✓	XC40 ✓
Mar	Astra Sports T. ✓		718 Cayman GT4RS ✓			Karoq ✓							T-Roc ✓	
Apr														
May												GR86 ✓		
Jun														
Jul														
Aug														
Sep						Enyaq Coupè ✓ ➡								
Oct								Korando E-Motion ➡				Corolla Cross ✓ ➡	Id Buzz	
Nov								X200 ➡						
Dec								J100	Solterra ➡		Cybertruck	BZ4x ➡		XC20

✓ Launch Concluded
➡ Launch Postponed
⬅ Launch Anticipated

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

Source: Quattroruote, Motor1

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 19/09/22 to 20/10/2022

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

For private and business customers: launch for Vans in the Mercedes-Benz online store

Ordering the desired vehicle easily and conveniently on the Internet, no matter from which location – Mercedes-Benz Vans now also offers this service (…)

https://www.automotiveworld.com/news-releases/for-private-and-business-customers-launch-for-vans-in-the-mercedes-benz-online-store/

Mercedes-Benz and Microsoft collaborate to boost efficiency, resilience and sustainability in car production

With the new data platform by Microsoft, Mercedes-Benz is connecting its around 30 passenger car plants worldwide to the Microsoft Cloud, enhancing transparency and predictability across its digital production and supply chain (…)

https://www.automotiveworld.com/news-releases/mercedes-benz-and-microsoft-collaborate-to-boost-efficiency-resilience-and-sustainability-in-car-production/

BMW Group collaborates with AWS to bring new cloud technologies for fast and reliable availability of digital innovations

The companies have announced a collaboration that will see the companies develop innovative cloud technologies together with the aim of harnessing the data potential of future vehicle generations to maximum effect (…)

https://www.automotiveworld.com/news-releases/bmw-group-collaborates-with-aws-to-bring-new-cloud-technologies-for-fast-and-reliable-availability-of-digital-innovations/

News on key industry trends

Electrification (1/4)

Europe chooses Be Charge to build one of the biggest fast charging network construction

The CINEA European agency has chosen the project of the Italian company that aims to build one of the largest high-power charging infrastructures along the main European transport corridors, in the parking areas and in the main urban nodes (…)

https://www.hdmotori.it/auto/articoli/n561484/be-charge-progetto-ricarica-commissione-europea/

Car-recharging stations should be available every 60 km, say MEPs

European parliament adopted its position on draft EU rules aimed at spurring the deployment of recharging and alternative refueling stations for cars, trucks, trains and planes and supporting the uptake of sustainable vehicles (…)

https://www.europarl.europa.eu/news/en/press-room/20221014IPR43206/car-recharging-stations-should-be-available-every-60-km-say-meps

New player FastWay wants to tackle Italy's EV infrastructure

The Italian startup aims to install 15.000 fast-charging points in Italy, delivered between 150 kW and 400 kW throughout the country in the next ten years (…)

https://www.electrive.com/2022/10/17/new-player-fastway-wants-to-tackle-italys-ev-infrastructure/

News on key industry trends

Electrification (2/4)

Poste Italiane: green light from EU for 5.000 charging points located in small cities

The project is going to be financed by Pnrr founds and it's part of Polis project which aims to offer different services to Italian's small cities (…)

https://www.fleetmagazine.com/poste-italiane-5000-colonnine-di-ricarica/amp/

Ubitricity (Shell group): European agreement with Citroën to expand the charging network

The Ubitricity-Citroën partnership is linked to the launch of the AMI electric vehicle in the United Kingdom: customers who choose the French brand's microcar will be able to recharge for free for 3 months at the UK charging points managed by Ubitricity (…)

https://e-ricarica.it/ubitricity-gruppo-shell-accordo-europeo-con-citroen-per-ampliare-la-rete-di-ricarica/

Daimler Truck & Gehring announce electric truck cooperation

Daimler Truck and Gehring Technologies have agreed on a partnership for the commercial vehicle-specific application of electric motors. This includes the prototypical construction of tailored electric power unit and the testing of new production processes (…)

https://www.electrive.com/2022/10/19/daimler-truck-gehring-announce-electric-truck-cooperation/

News on key industry trends

Electrification (3/4)

VW subsidiary PowerCo & Umicore launch battery joint venture

From 2025 the joint venture is aiming to supply PowerCo's European battery cell factories with key materials to have enough production capacity for 160 gigawatt, sufficient for around 2.2 million fully electric vehicles (…)

https://www.electrive.com/2022/09/26/vw-subsidiary-powerco-umicore-launch-battery-joint-venture/

VW & Xanadu to utilize quantum computing for battery development

The companies have launched a multi-year research program to optimize the computing power of quantum algorithms for battery materials simulation. This is expected to reduce computational costs and to develop more cost-effective battery materials (…)

https://www.electrive.com/2022/10/19/vw-xanadu-to-utilitize-quantum-computing-for-battery-development/

Renault: Mobilize plans ultra-rapid charging network in Europe

Renault's Mobilize has announced plans for a network of ultra-fast charging hubs in Europe. Mobilize Fast Charge will comprise 200 sites with six charge points, each adding up to 1.200 plugs of which 300 in Italy(…)

https://www.electrive.com/2022/10/10/renault-mobilize-plans-ultra-rapid-charging-network-in-europe/

News on key industry trends

Electrification (4/4)

Saic Rising auto, Catl and the two oil companies Sinopec and CNPC: the chinese way to battery swap

The alliance among the 4 companies is aiming to the battery leasing to EV vehicles and to build a new business model that divide cars and battery management (…)

https://www-vaielettrico-it.cdn.ampproject.org/c/s/www.vaielettrico.it/saic-catl-e-due-big-del-petrolio-ecco-la-via-cinese-al-battery-swap/?amp=1

Hertz, Bp collaborate to accelerate EV charging in North America

Hertz and Bp announced the signing of a memorandum of understanding (MOU) for the development of a national network of EV charging stations powered by Bp Pulse, Bp's global electrification and charging solution brand (…)

https://www.automotiveworld.com/news-releases/hertz-bp-collaborate-to-accelerate-ev-charging-in-north-america/

News on key industry trends

Connectivity

Next generation BMW voice assistant to be based on Amazon Alexa technology	The Alexa technology will enable an even more natural dialogue between driver and vehicle, so drivers can stay focused on the road. This will bring the digital experience to an entirely new level (…)

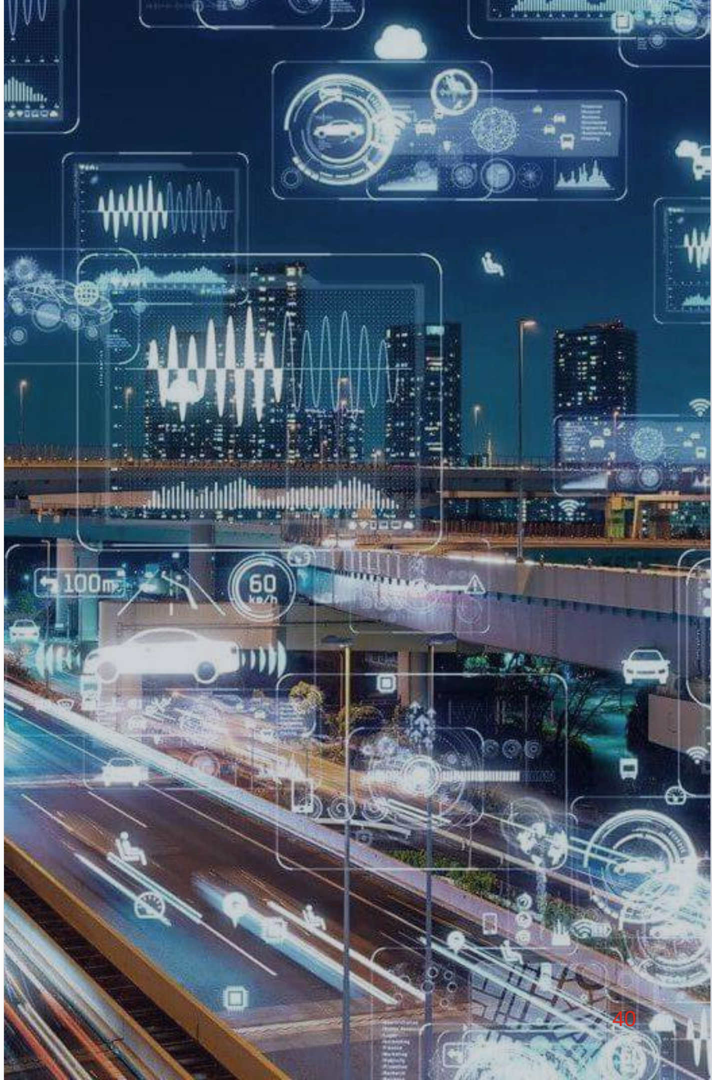
https://www.automotiveworld.com/news-releases/next-generation-bmw-voice-assistant-to-be-based-on-amazon-alexa-technology/

Hyundai Motor outlines future roadmap for software-defined vehicles	Hyundai Motor Group announced a new global strategy to transform all vehicles to software-defined vehicles by 2025. The initiative will give customers the freedom to upgrade the performance and functionality of their vehicles remotely (…)

https://www.greencarcongress.com/2022/10/20221013-hyundaisdv.html

Wejo unveils integration of live, real-time connected vehicle data with prototype of autonomous vehicle	Wejo Group Limited, a global leader in smart mobility, cloud and software analytics for connected, electric and autonomous vehicle data, today unveiled DLIVEREE, an AV prototype that is being used to develop and demonstrate (…)

https://www.automotiveworld.com/news-releases/wejo-unveils-integration-of-live-real-time-connected-vehicle-data-with-prototype-of-autonomous-vehicle/



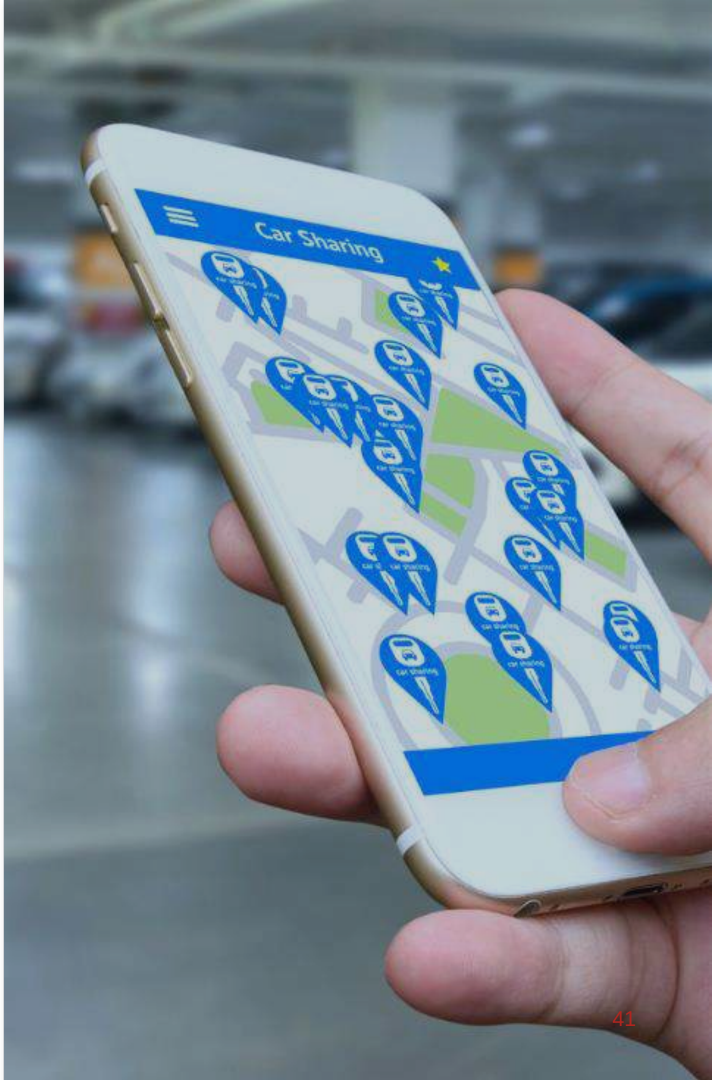
News on key industry trends

Mobility Services

Honda & Sony establish SHM joint venture

The SHM joint venture is owned equally by the two partners, and it will be focused on electric cars production and mobility services initially for United States (…)

https://www.electrive.com/2022/10/15/honda-sony-establish-shm-joint-venture/



News on key industry trends

Sustainability (1/2)

HyCET research project: consortium promotes sustainable transport logistics using hydrogen trucks

A sustainable transport project with long-distance potential: In September 2022, the German Federal Ministry for Digital and Transport approved the funding application for the consortium research project HyCET led by the BMW Group (…)

https://www.automotiveworld.com/news-releases/hycet-research-project-consortium-promotes-sustainable-transport-logistics-using-hydrogen-trucks/

Brussels mandates all car parks to get charging stations by 2025

Brussels Capital Region's authorities decided to introduce a new policy, mandating that all car parks that have over 10 spaces need to install charging stations for electric vehicles by 2025. From 1 January 2025, office car parks will have to convert (…)

https://www.themayor.eu/en/a/view/brussels-mandates-all-car-parks-to-get-charging-stations-by-2025-11073

Being "carbon neutral": plans for 9 italian cities

Bergamo, Bologna, Firenze, Milano, Padova, Parma, Prato, Roma and Torino are going to reach the climate neutrality by 2030. The European Commission has signed an agreement with the infrastructure italian minister to reach the point (…)

https://www.fleetmagazine.com/piano-neutralita-climatica-9-citta-italiane/?utm_source=linkedin

News on key industry trends

Sustainability (2/2)

Bridgestone marks important step towards sustainability goals	The certification marks a step in Bridgestone's ambitious global journey towards the use of 40% sustainable materials by 2030, and 100% sustainable materials by 2050

https://www.automotiveworld.com/news-releases/bridgestone-marks-important-step-towards-sustainability-goals-roma-plant-italy-becomes-first-to-achieve-internationally-recognised-iscc-plus-sustainability-certification/

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