

# BIP AutoObserver

Analysis of new car registrations

*March 2023*



# Executive Summary

## Analysis of new car registrations in Europe & Spain – March 2023



### Europe\*

+26,1%

**Top Countries by growth of new registrations:** 29 countries grew in March 2023 compared to March 2022, the highest rates for Cyprus (+108,8%), Spain (66,1%) and Portugal (+60,1%). Only 2 Countries decreased, Bulgaria (-14,5%) and Malta (-29,1%).

**Top 3 Countries by market share:** Germany 20,6% (-2,1 p.p.), UK 15,3% (+0,1 p.p.) and Italy 13,2% (+0,9 p.p.) in March 2023 YTD compared to March 2022 YTD.

**Brands:** among the **Top 15 by volume**, the highest growth comparing March 2023 to March 2022 for Skoda (+50,0%), Dacia (+34,5%) and Volkswagen (+31,8%), while highest decrease for Alpine (-43,1%) and Mitsubishi (-32,0%)

**Premium brands\*\*:** all 3 Premium brands increased both in the month of March 2023 and YTD, Audi (+25,5% monthly and +19,3% YTD), Mercedes (17,5% monthly and 12,7% YTD) and BMW (+15,5% monthly and 4,9%YTD)



### Spain

+66,1%

**Areas monthly results:** North +23,1%, Center/West +61,3%, East +33,7%, South +29,1% and Islands +36,8%, comparing March 2023 with March 2023

**Customer segments:** Retail +32,7%, Fleet +216,7% and Business +29,0% March 2023 YTD vs March 2022 YTD

**Brands:** among the **Top 15 by volume** all of them are growing in volume. Toyota, Seat, Peugeot, Kia and Volkswagen are the brands with a higher Market Share (8,73%, 7,59%, 7,47%, 7,06% and 6,31% respectively)

**Premium brands:** among the Top 15 by volume Mercedes, Audi and BMW are increasing in volume YTD in March 2023 (41,86%, 50,25%, 13,11% respectively). Only Audi has more market share than previous year, increasing it from 3,97% to 4,13%.



## 01. Europe

- | Market overview
- | New car registrations by brands

02. Spain

03. New car models launches in Spain

04. News on key industry trends

# Europe | Market Overview

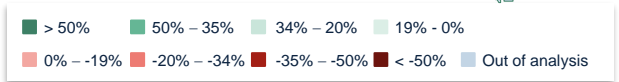
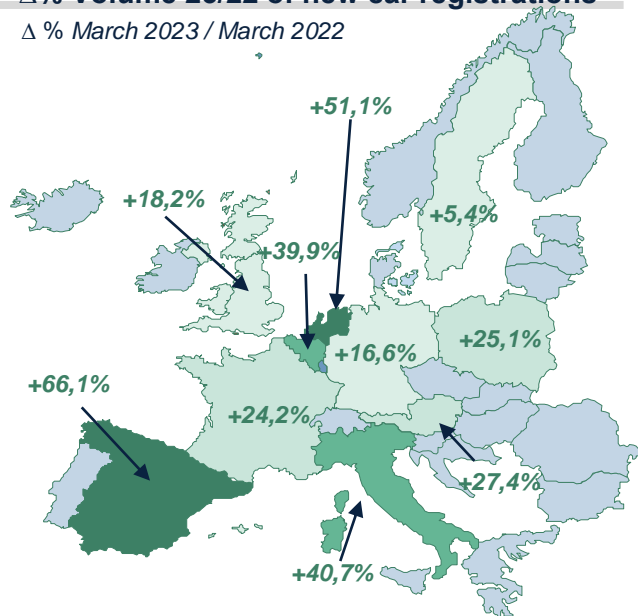
## Top 10 European Markets\* – March 2023

European Markets\*  
new car registrations

|      |           |   |
|------|-----------|---|
| 2022 | 1.127.709 | +26,1%  |
| 2023 | 1.422.147 |   |

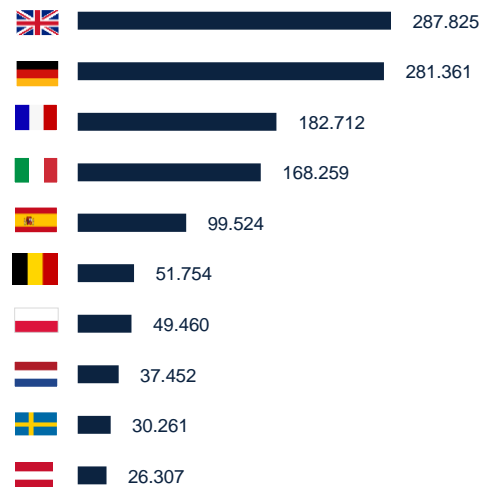
### Δ% Volume 23/22 of new car registrations

Δ % March 2023 / March 2022



### Number of EU new car registrations 2023

New car registration March 2023



### ! Highlights

- The European market (EU+UK+EFTA) **registrations** increased from 1.127.709 in March 2022 to 1.422.147 cars in March 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:
  - Spain (+66,1%)
  - Netherlands (+51,1%)
  - Italy (+40,7%)

# Europe | Market Overview

Top 10 European Markets\* – March 2023 YTD

European Markets\*  
new car registrations

2022

2.754.927

+17,5%

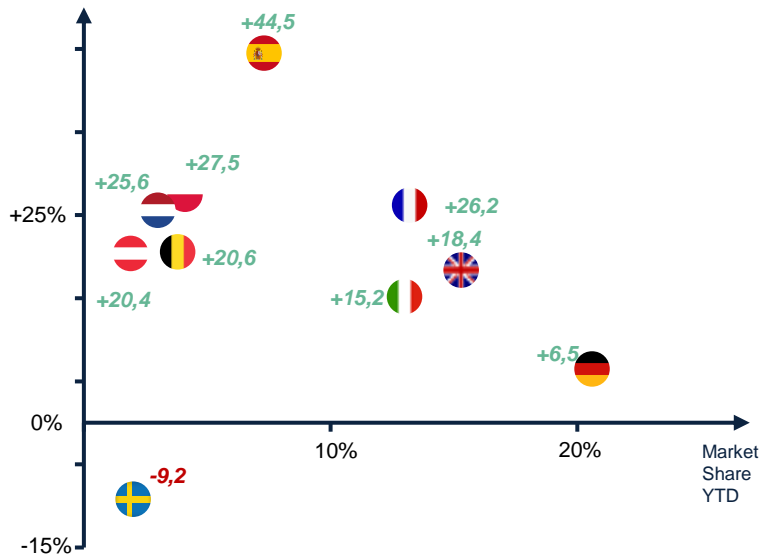


2023

3.235.951

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

Δ % Volume March 23/22



| #  | Country | MS March 2023 YTD | Δ VS 2022 | Sales Volume March 2023 YTD |
|----|---------|-------------------|-----------|-----------------------------|
| 1  | GER     | 20,6%             | +6,5%     | 666.818                     |
| 2  | UK      | 15,3%             | +18,4%    | 494.260                     |
| 3  | ITA     | 13,2%             | +26,2%    | 427.067                     |
| 4  | FRA     | 13,0%             | +15,2%    | 420.887                     |
| 5  | SPA     | 7,3%              | +44,5%    | 237.563                     |
| 6  | BEL     | 4,1%              | +27,5%    | 131.484                     |
| 7  | POL     | 3,8%              | +20,6%    | 123.031                     |
| 8  | NET     | 3,0%              | +25,6%    | 98.425                      |
| 9  | SWE     | 2,0%              | -9,2%     | 63.304                      |
| 10 | AUS     | 1,9%              | +20,4%    | 63.052                      |



## Highlights

- Considering YTD results **27 countries out of 31 increased in March 2023** compared to March 2022 YTD, with significant results for **Greece (+50,6%)** and **Portugal (+49,6%)**. Only 4 countries decreased, with the highest decline for Malta (-13,7%) and Norway (-11,4%)
- Regarding the top 10 countries, **UK Market Share registered an important growth** compared to February 2023 (+3,9 p.p., 15,3% in March 2023, versus 11,4% in Feb 2023)



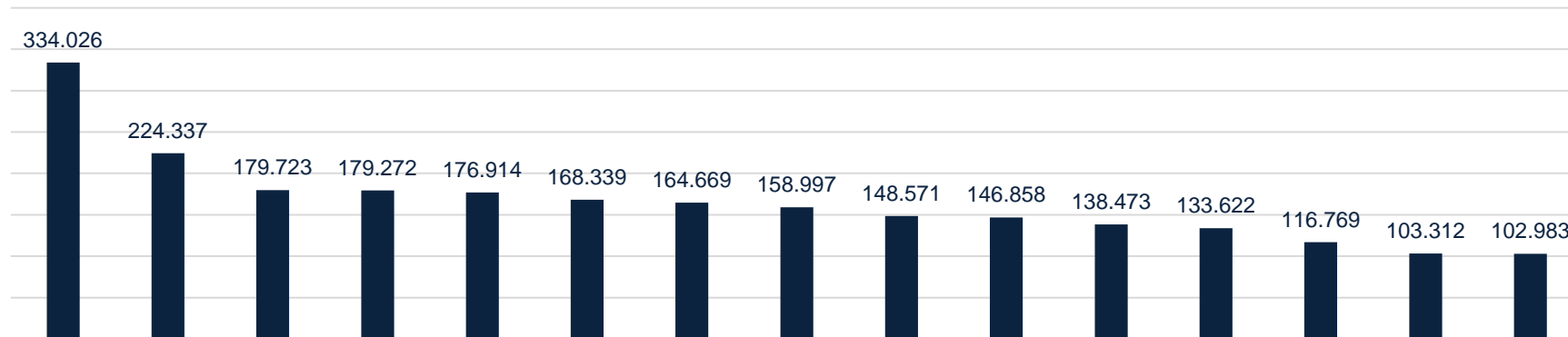
Source: ACEA

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

# Europe | New car registrations by brand



Top 15 – March 2023 YTD



|              |        |        |        |        |        |         |         |        |         |         |         |        |         |        |        |
|--------------|--------|--------|--------|--------|--------|---------|---------|--------|---------|---------|---------|--------|---------|--------|--------|
| Δ Vol. 23/22 | +23,9% | +19,9% | +10,2% | +19,3% | +12,7% | 29,0%   | +4,9%   | +15,2% | +2,2%   | +41,8%  | +4,1%   | +7,6%  | +5,5%   | +7,5%  | +6,3%  |
| MS '22       | 10,3%  | 6,9%   | 5,6%   | 5,5%   | 5,5%   | 5,2%    | 5,1%    | 4,9%   | 4,6%    | 4,5%    | 4,3%    | 4,1%   | 3,6%    | 3,2%   | 3,2%   |
| Δ MS 23/22   | +5,10% | +1,47% | -5,08% | +0,00% | -3,51% | +10,64% | -10,53% | -2,00% | -13,21% | +18,42% | -10,42% | -8,89% | -10,00% | -8,57% | -8,57% |



Source: ACEA

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



01. Europe

## 02. Spain

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

03. New car models launches in Spain

04. News on key industry trends



### March 2023 Highlights

After a year 2022 where sales decreased from year 2021 (-5,4%), the sector has been on an upward trend in the beginning of 2023 increasing sales in January (+51,4%), February (+19,2%) and March (+66,1%). This result can be **reasoned by two aspects**: the first is the **comparison with March 2022**, a month in which the market was severely affected by the crisis, recording a -29,7% compared to 2021, the second is related to the **improvement in the supply chain**, which had negatively influenced sales performance, after a long period characterized by the semiconductor and microchip crisis.

In March 2023, the Spanish market registered a high number of sales (99.524), the highest sales in a month since 2021. Regarding **vehicle registrations by customer segment** in March 2023: **Fleet** (+216,7%), **Retail** (+32,7%) and **Business** (+29,0%) registered huge increases compared to 2022.

Since the beginning of the year, in Spain there have been sold a total of **237.672** units, so the market **increased by 44,5%** in comparison with the same period for 2022. Registrations of **petrol** and **electric cars** continue to position themselves as the first purchase option for users.





# Spain | Market Overview

Spanish Market – March 2023 vs March 2022

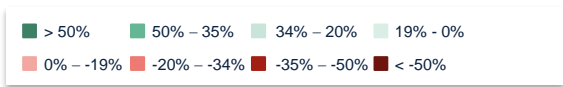
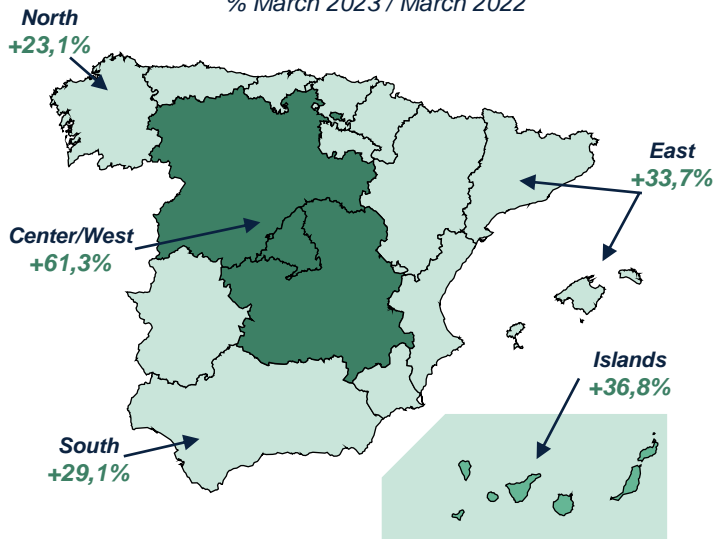
Spain New Car Registrations

|      |        |
|------|--------|
| 2022 | 59.920 |
| 2023 | 99.524 |

+66,1% 

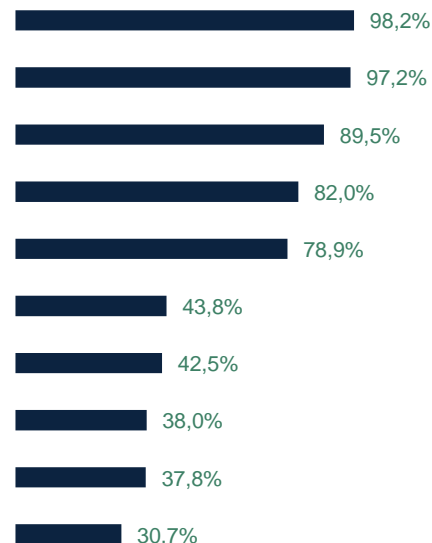
## Δ% Volume 23/22 of New Car Registrations

% March 2023 / March 2022



## Growth of Top 10 Brands by Volumes

Δ% March 2023 / March 2022



## ! Highlights

- In March 2023, the Spanish market experienced an **overall increase (+66.1%)** in registrations for all geographic areas. In March 2023, the **Center/West** had the best performance (+61,3%)
- 10 of the top 10 brands registered a **positive** variation, **Renault leading** with a +98,2% growth by volume, followed by **Toyota (+97,2%)** and **Seat (+89,5%)**

# Spain | Market Overview

Spanish Market – March 2023 YTD vs March 2022 YTD

Spain New Car Registrations (YTD)

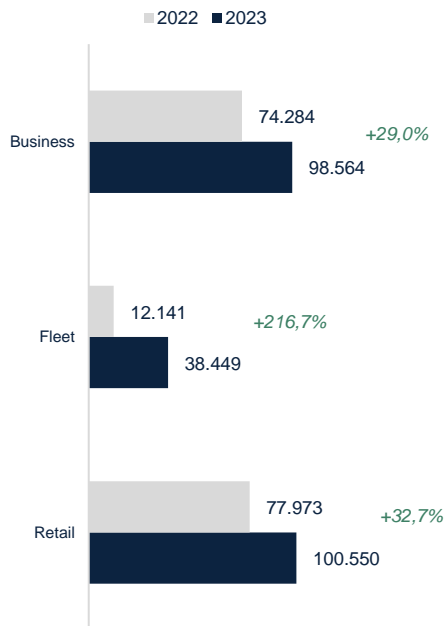
|      |         |
|------|---------|
| 2022 | 164.399 |
| 2023 | 237.563 |

+44,5%



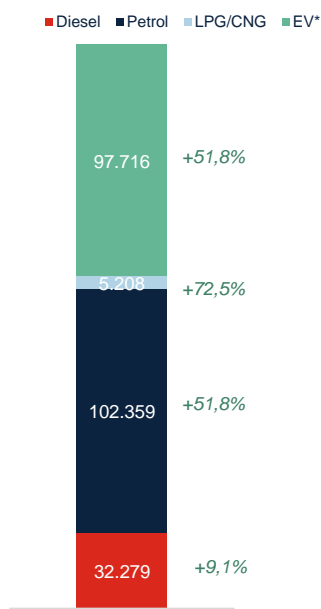
## Analysis by “Customer Segment”

Registration YTD '23/'22



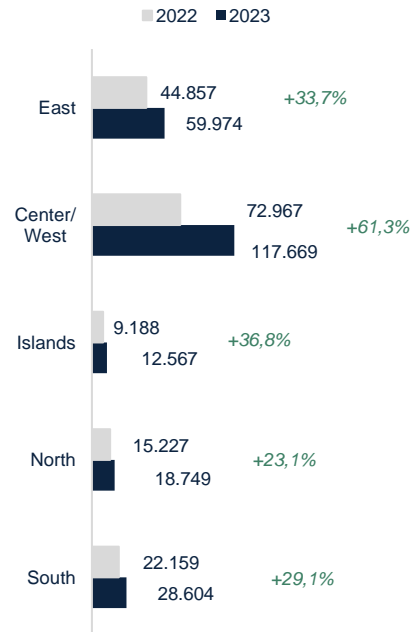
## Analysis by “Fuel Type”

Registration YTD '23



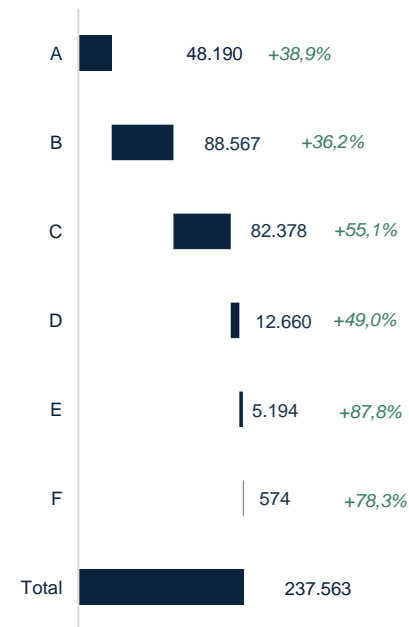
## Analysis by “Geographical Area”

Registration YTD '23/'22



## Analysis by “Car Segment”

Registration YTD '23/'22

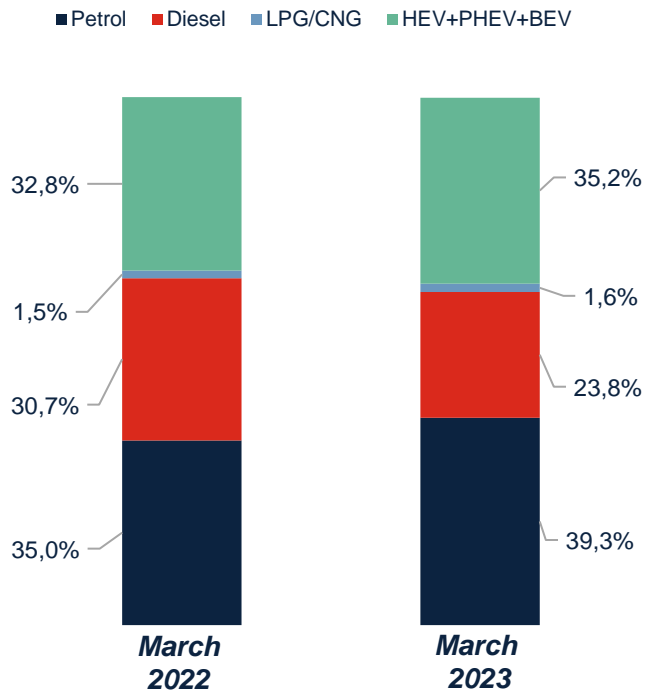


Source: ANFAC

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



### “Fuel Type” mix evolution (Market Share)



|                   | HEV       | PHEV      | BEV       |
|-------------------|-----------|-----------|-----------|
| <b>MS</b>         |           |           |           |
| March '22         | 23,3%     | 4,7%      | 4,8%      |
| <b>MS</b>         |           |           |           |
| March '23         | 25,1%     | 5,2%      | 4,9%      |
| <b>MS Delta</b>   |           |           |           |
| March '23 vs. '22 | +1,8 p.p. | +0,5 p.p. | +0,1 p.p. |

- As highlighted in the YTD'23 Analysis by “Fuel Type” registration, the trend is that the **fuel type increasing the most is LPG/CNG (+72,5%)**, followed by **EV (+51,8%)** and **Petrol (+51,8%)**.
- The most significant difference between March 2023 compared to 2022 is that **Diesel registered a lost** in terms of market share (-6,9 p.p.) while **EV increased** their market share (+2,4 p.p.).
- This increase was **due mainly to mild hybrid vehicles (HEV)**, with 1,8 p.p. while **Battery Electric Vehicle (BEV)** and **PHEV** combined just add up to 0,6 p.p.

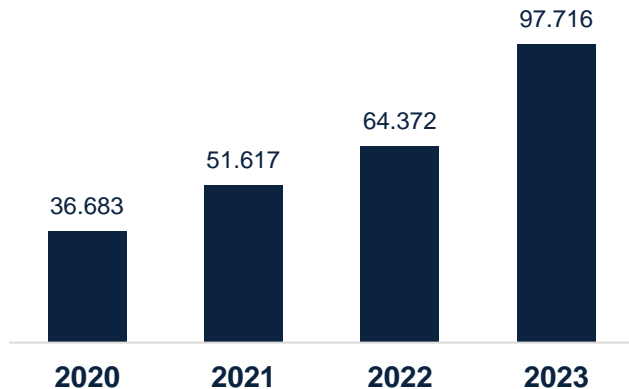
# Spain | New car registrations by fuel type



## New car registrations of Hybrid vs Pure Electric vehicles

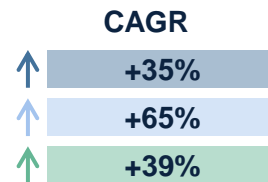
### EV Registrations Trend March '23 YTD

|           |      |      |      |      |
|-----------|------|------|------|------|
| Delta YoY | +36% | +41% | +25% | +52% |
| M.S.      | 17%  | 28%  | 39%  | 41%  |

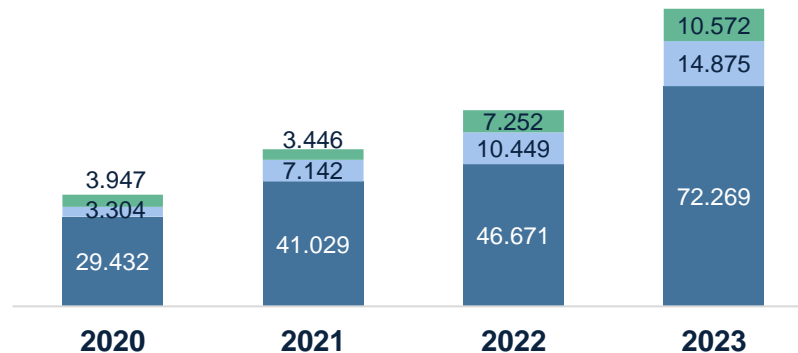


### HEV\*, PHEV\* and BEV\*\* Vehicles Trend March '23 YTD

■ HEV ■ PHEV ■ BEV



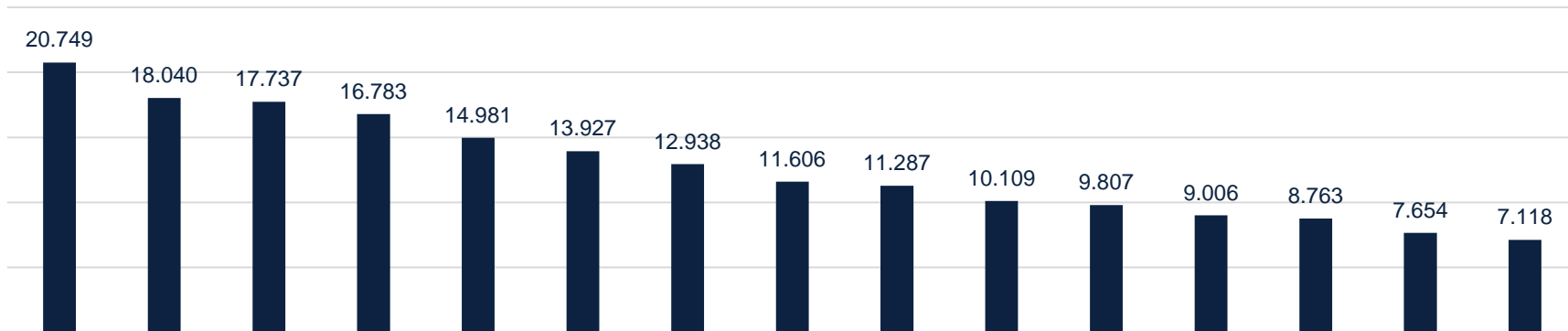
Compared to 2022, 2023 registered an **increase** in EV registrations



# Spain | New car registrations by brand



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

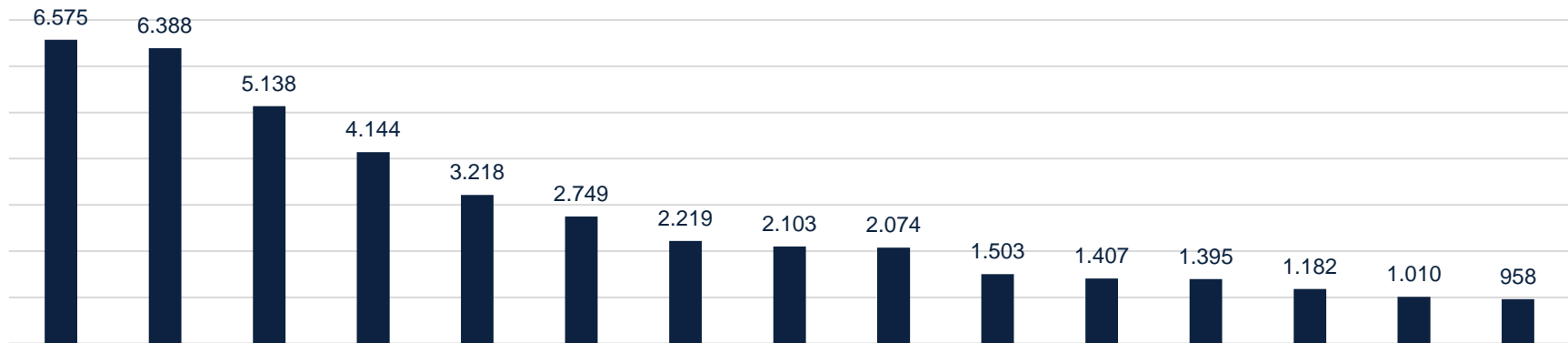


|                     |         |         |         |         |         |         |         |          |         |         |         |         |         |         |         |
|---------------------|---------|---------|---------|---------|---------|---------|---------|----------|---------|---------|---------|---------|---------|---------|---------|
| Δ Vol. 23/22        | +37,46% | +52,06% | +35,45% | +23,81% | +28,76% | +26,85% | +73,57% | +140,64% | +29,13% | +41,86% | +50,25% | +26,05% | +72,04% | +91,11% | +13,11% |
| M.S. '23            | 8,73%   | 7,59%   | 7,47%   | 7,06%   | 6,31%   | 5,86%   | 5,45%   | 4,89%    | 4,75%   | 4,26%   | 4,13%   | 3,79%   | 3,69%   | 3,22%   | 3,00%   |
| Δ M.S. (p.p.) 23/22 | -0,45   | +0,38   | -0,50   | -1,18   | -0,77   | -0,82   | +0,91   | +1,95    | -0,57   | -0,08   | +0,16   | -0,56   | +0,60   | +0,79   | -0,83   |

# Spain | New car registrations by brand



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

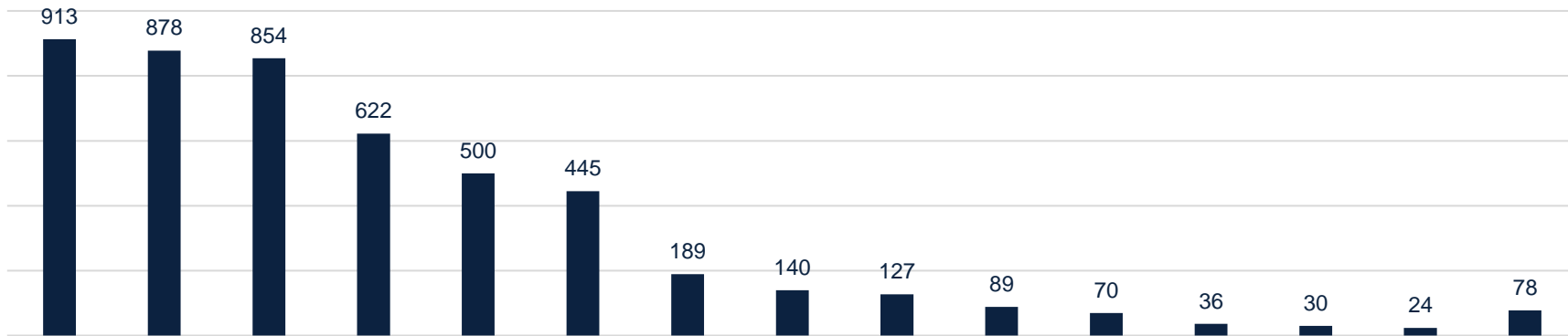


|                     |         |         |         |         |          |         |         |        |         |          |          |         |         |        |          |
|---------------------|---------|---------|---------|---------|----------|---------|---------|--------|---------|----------|----------|---------|---------|--------|----------|
| Δ Vol. 23/22        | +70,69% | +48,25% | +57,66% | +35,78% | +498,14% | +27,86% | -12,01% | +9,36% | +46,88% | +155,61% | +46.800% | +35,70% | +15,88% | +3,06% | +224,75% |
| M.S. '23            | 2,77%   | 2,69%   | 2,16%   | 1,74%   | 1,35%    | 1,16%   | 0,93%   | 0,89%  | 0,87%   | 0,63%    | 0,59%    | 0,59%   | 0,50%   | 0,43%  | 0,40%    |
| Δ M.S. (p.p.) 23/22 | +0,42   | +0,07   | +0,18   | -0,11   | +1,03    | -0,15   | -0,60   | -0,28  | +0,01   | +0,27    | +0,59    | -0,04   | -0,12   | -0,17  | +0,22    |

# Spain | New car registrations by brand



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



|                     |         |         |          |         |        |         |         |          |         |       |         |         |         |       |        |
|---------------------|---------|---------|----------|---------|--------|---------|---------|----------|---------|-------|---------|---------|---------|-------|--------|
| Δ Vol. 23/22        | +37,50% | +75,25% | +121,24% | -33,40% | 70,65% | -37,32% | +18,13% | +337,50% | -36,50% | 0,0%  | +89,19% | +80,00% | +57,89% | 0,00% | +76.3% |
| M.S. '23            | 0,38%   | 0,37%   | 0,36%    | 0,26%   | 0,21%  | 0,19%   | 0,08%   | 0,06%    | 0,05%   | 0,04% | 0,03%   | 0,02%   | 0,01%   | 0,01% | 0,03%  |
| Δ M.S. (p.p.) 23/22 | -0,02   | +0,06   | +0,12    | -0,31   | +0,03  | -0,24   | -0,02   | +0,04    | -0,07   | +0,04 | +0,01   | 0,00    | 0,00    | +0,01 | -0,02  |

# Spain | New car registrations by group



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

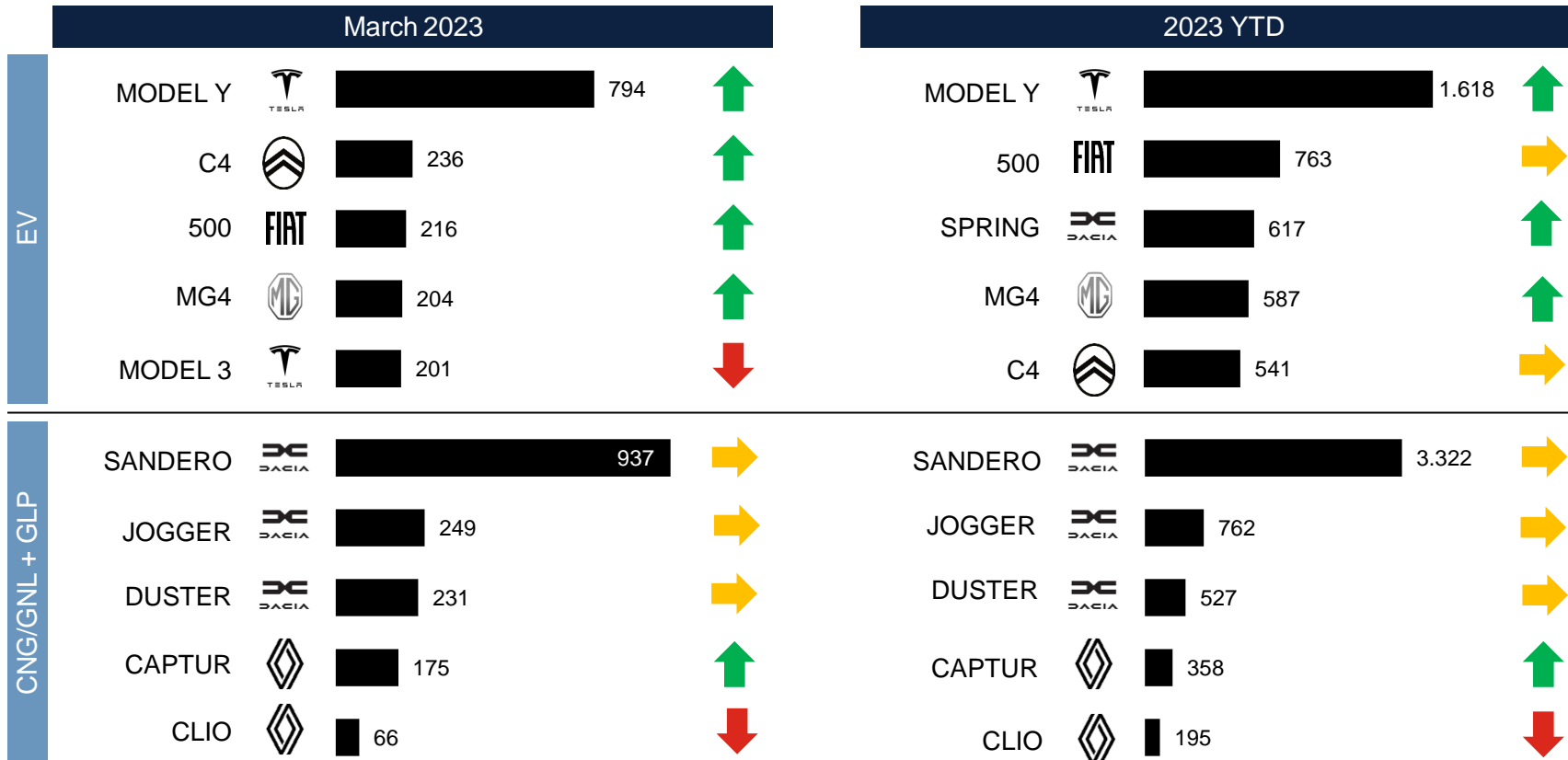
|    | Group           | Brand | Volume | Δ% Volume '23 vs '22 | Market Share (%)          |
|----|-----------------|-------|--------|----------------------|---------------------------|
| 1  | Volkswagen      |       | 56.550 | +49,0%               | 23,8%                     |
| 2  | Stellantis      |       | 48.570 | +38,0%               | 20,4%                     |
| 3  | Renault         |       | 24.556 | +99,7%               | 10,3%                     |
| 4  | Toyota          |       | 22.644 | +37,9%               | 9,5%                      |
| 5  | Kia             |       | 16.783 | +23,8%               | 7,1% <i>Top 5: 71,1%</i>  |
| 6  | Hyundai         |       | 13.927 | +26,9%               | 5,9%                      |
| 7  | Mercedes - Benz |       | 10.236 | +39,7%               | 4,3%                      |
| 8  | BMW             |       | 9.221  | +12,2%               | 3,9%                      |
| 9  | Ford            |       | 9.006  | +26,0%               | 3,8%                      |
| 10 | Nissan          |       | 6.575  | +70,7%               | 2,8% <i>Top 10: 91,8%</i> |
| 11 | Mazda           |       | 4.144  | +35,8%               | 1,7%                      |
| 12 | MG              |       | 3.218  | +498,1%              | 1,4%                      |
| 13 | Volvo           |       | 2.749  | +27,9%               | 1,2%                      |
| 14 | Tesla           |       | 2.074  | +46,9%               | 0,9%                      |
| 15 | Suzuki          |       | 1.503  | +155,6%              | 0,6%                      |



# Spain | New car registrations by fuel type



## New car registrations by fuel type – Top 5 – EV and CNG/GNL + GLP



Source: ANFAC

Ranking variation compared to previous period

# Spain | New car registrations by fuel type



## New car registrations by fuel type – Top 5 – Hybrid (HEV and PHEV)

|      | March 2023    |  |  |       |   | 2023 YTD      |  |  |       |   |
|------|---------------|--|--|-------|---|---------------|--|--|-------|---|
| HEV  | C-HR          |  |  | 2.943 | ↑ | C-HR          |  |  | 6.459 | ↑ |
|      | QASHQAI       |  |  | 2.180 | ↑ | COROLLA       |  |  | 4.510 | ↓ |
|      | COROLLA       |  |  | 1.722 | ↑ | QASHQAI       |  |  | 4.139 | ↑ |
|      | 500           |  |  | 1.646 | ↑ | 500           |  |  | 3.831 | ↓ |
|      | YARIS CROSS   |  |  | 1.570 | ↓ | YARIS CROSS   |  |  | 3.509 | ↑ |
| PHEV | KUGA          |  |  | 486   | → | KUGA          |  |  | 1.324 | ↑ |
|      | 01 LYNK&CO    |  |  | 449   | ↑ | 01 LYNK&CO    |  |  | 958   | → |
|      | ECLIPSE CROSS |  |  | 354   | ↑ | ECLIPSE CROSS |  |  | 625   | ↑ |
|      | XCEED         |  |  | 278   | ↑ | 3008          |  |  | 605   | ↓ |
|      | 3008          |  |  | 239   | → | COMPASS       |  |  | 586   | ↑ |



Source: ANFAC

↑ → ↓ Ranking variation compared to previous period

# Spain | New car registrations by segment



## Overview of new car registrations by segment

### Segments Growth in Market Share\*

**A**  
«Utility/City»



-0,8 p.p.

**D**  
«Executive»



+0,2 p.p.

**B**  
«Supermini»



-2,2 p.p.

**E**  
«Luxury»



+0,5 p.p.

**C**  
«Medium»



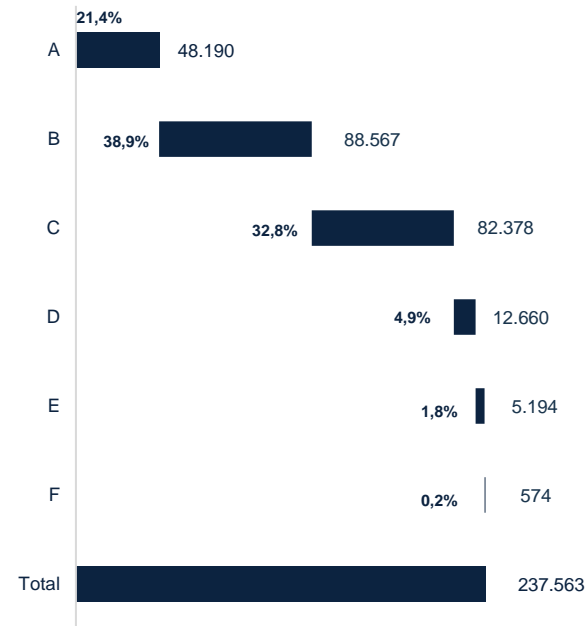
+2,4 p.p.

**F**  
«Ultra Luxury»



0,0 p.p.

### Market Share and Volume\*\*



Source: ANFAC

(\* ) Δ% March 2023 YTD / March 2022 YTD; \*\* Market Share and Volume March 2023 YTD

A: less than 3,8m  
D: between 4,6m and 4,9m

B: between 3,8m and 4,2m  
E: more than 4,9m

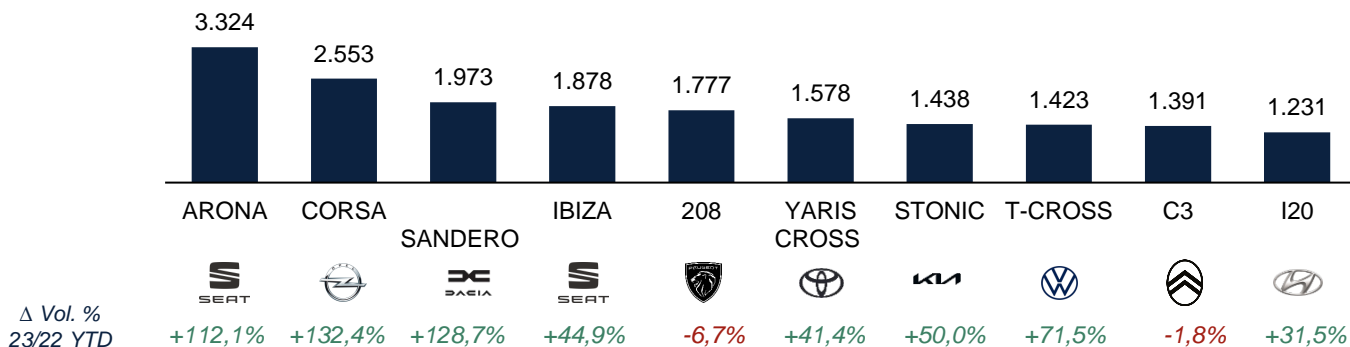
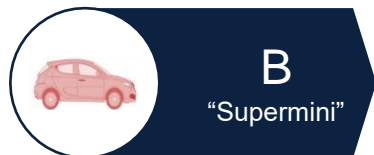
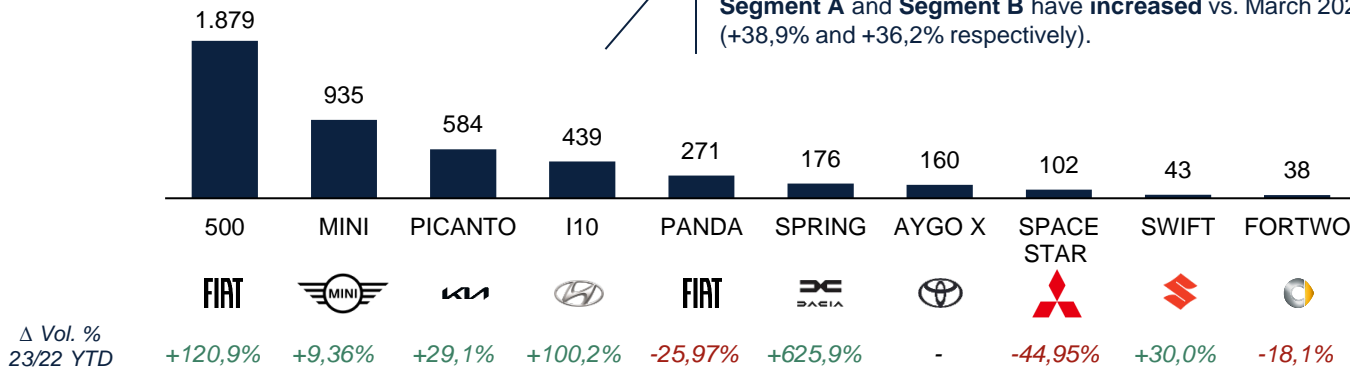
C: between 4,2m and 4,6m  
F: more than 4,9m and +100k €

# Spain | New car registrations by segment



## Segment A and Segment B – Top 10 – March 2023 YTD

In terms of **MS**, respectively vs March 2022 YTD, **Segment A** has registered a decrease (-0,8 p.p.) as well as **Segment B** (-2,2 p.p.). Considering the volumes, in March 2023 both **Segment A** and **Segment B** have **increased** vs. March 2022 (+38,9% and +36,2% respectively).



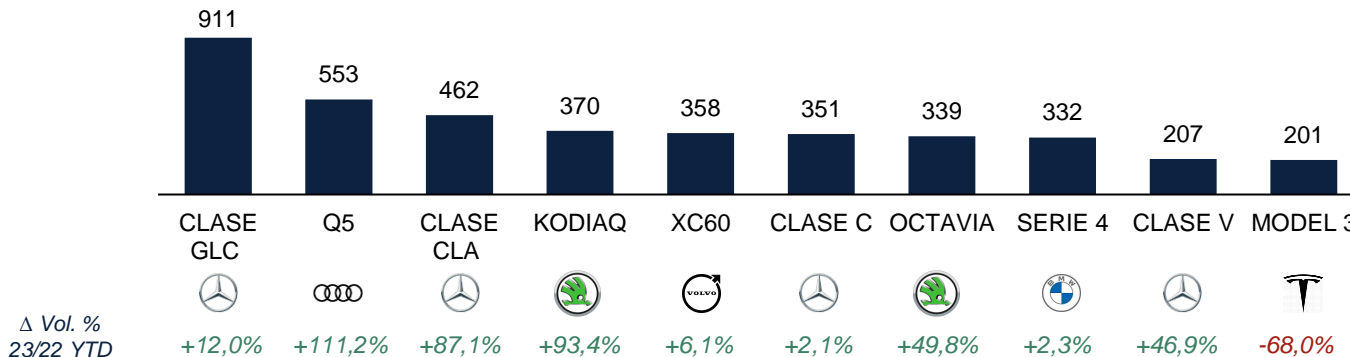
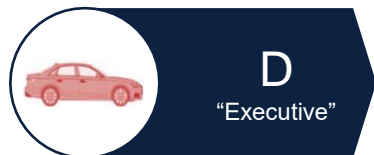
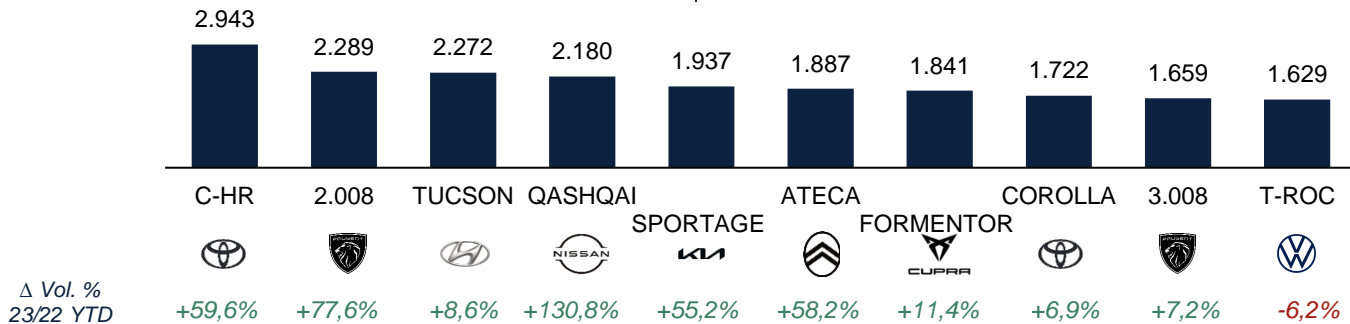
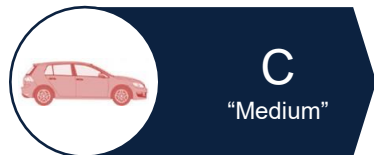
Source: ANFAC

# Spain | New car registrations by segment



## Segment C and Segment D – Top 10 – March 2023 YTD

In terms of **MS**, respectively vs December 2021 YTD, **Segment C** has registered an increase (+2,4 p.p.) as well as **Segment D** (+0,2 p.p.). Considering the volumes, in March 2023 both **Segment C** and **Segment D** have **increased** vs. March 2022 (+55,1% and +49,0% respectively).

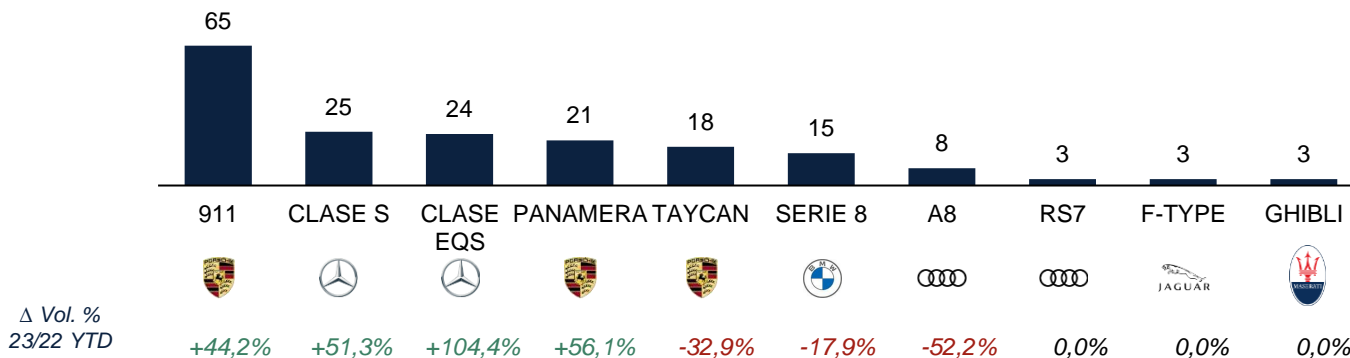
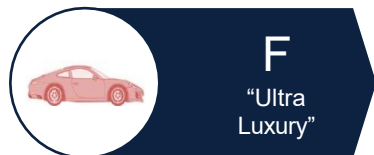
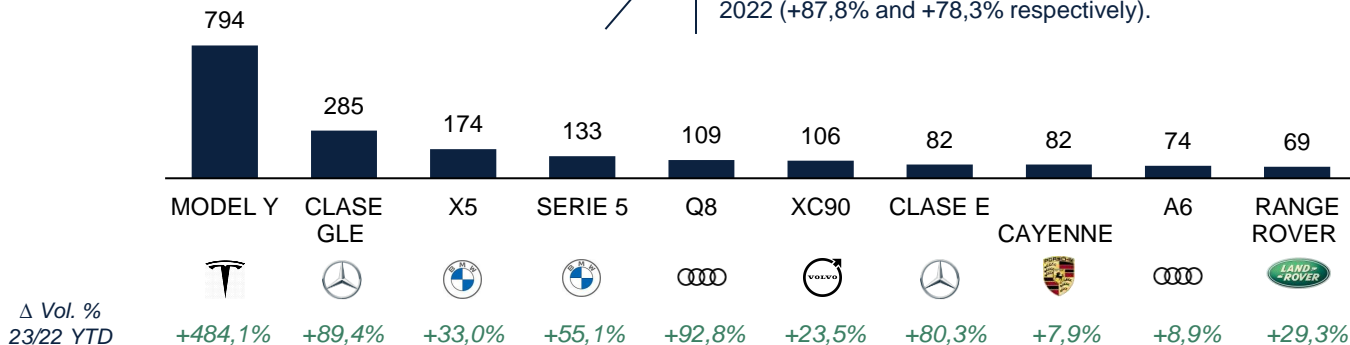
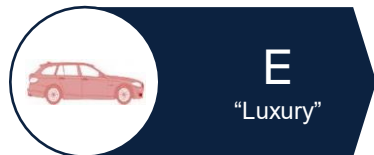


# Spain | New car registrations by segment



## Segment E and Segment F – Top 10 –March 2023 YTD

In terms of **MS**, respectively vs March 2022YTD, **Segment E** and **Segment F** have remained almost unmodified (+0,5 p.p. and 0,0 p.p.), Considering the volumes, in March 2023 both **Segment E** and **Segment F** have **increased** vs. March 2022 (+87,8% and +78,3% respectively).





01. Europe
























































02. Spain

**03. New car models launches in Spain**

04. News on key industry trends

# New Car Models Launches in Spain

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

|     |  <b>Alfa Romeo</b>  |  <b>Audi</b>  |  <b>BMW</b>  |  <b>Citroën</b>  |  <b>Cupra</b> |  <b>Dacia</b>   |  <b>Ferrari</b>   |  <b>Fiat</b>  |  <b>Ford</b>   |  <b>Honda</b> |  <b>Hyundai</b>  |
|-----|--|--|---|---|--|--|--|--|---|--|---|
| Jan |  Giulia<br>✓   |  |  M3 Touring<br>✓  |   |  |  |  500<br>✓  |  |   |  |  IONIQ 6<br>✓     |
| Feb |  Stelvio<br>✓  |  Q6 e-tron<br>→    |   |   |  |  Jogger Hybrid<br>→  |  |  Panda 4x4<br>✓  |   |  |   |
| Mar |  |  |  M3 CS<br>✓       |   |  |  |  |  |   |  |  CR-V<br>✓        |
| Apr |  |  Q2 e-tron<br>     |  M2 y X6 LCI<br>  |   |  |  |  |  |   |  |   |
| May |  |  |   |   |  |  |  |  |   |  |   |
| Jun |  |  |   |  C3<br> |  |  |  |  |   |  |  Civic Type R<br> |
| Jul |  |  A3 Cityhooper<br> |  i7 y XM<br>      |   |  |  |  |  |  Tourneo Connect PHEV<br> |  |  Kona<br>         |
| Aug |  |  A4 Avant<br>      |   |   |  |  |  |  |   |  |   |
| Sep |  |  |   |   |  |  |  |  |   |  |   |
| Oct |  |  |   |   |  |  |  |  |   |  |   |
| Nov |  |  |   |   |  |  |  |  |   |  |   |
| Dec |  |  |  i5<br>           |   |  |  |  |  |  Bronco<br>               |  |  IONIQ 5N<br>     |



# New Car Models Launches in Spain

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

|     | JAGUAR | Jeep         | KIA            | LAND-ROVER     | Lexus   | LYNK & CO               | MINI             | Mazda                 | Mercedes                      | MG            | MINI           | Mitsubishi | MOBILIZE | NISSAN             |
|-----|--------|--------------|----------------|----------------|---------|-------------------------|------------------|-----------------------|-------------------------------|---------------|----------------|------------|----------|--------------------|
| Jan |        | Avenger<br>→ |                |                | RZ<br>✓ |                         | GranTurismo<br>✓ | MX-30 e-Skyactiv<br>✓ |                               |               |                |            |          |                    |
| Feb |        |              |                | Sport SVR<br>→ |         |                         |                  |                       | EQE SUV y AMG S 63 E<br>→     |               |                |            |          |                    |
| Mar |        |              |                |                |         |                         |                  |                       | CLA Shooting y Cla Coupé<br>✓ |               |                | ASX<br>→   |          |                    |
| Apr |        |              |                |                |         | GranTurismo Folgore<br> |                  |                       |                               |               |                |            |          |                    |
| May |        |              |                |                |         |                         |                  |                       | EQT<br>                       |               |                |            |          |                    |
| Jun |        |              |                | SVR<br>        |         |                         |                  | 6 y MX30 EV REEX<br>  |                               |               | Countryman<br> |            |          |                    |
| Jul |        |              |                |                | RX<br>  |                         |                  |                       | GLE y GLE coupé<br>           |               |                | Colt<br>   |          |                    |
| Aug |        |              |                |                |         |                         |                  |                       |                               |               |                |            |          | B-SUV Electric<br> |
| Sep |        |              |                |                |         |                         |                  |                       |                               |               |                |            |          |                    |
| Oct |        |              |                |                |         |                         |                  |                       |                               |               |                |            |          |                    |
| Nov |        |              | EV7<br>        |                |         | 08<br>                  |                  |                       | EQG<br>                       | VS HEV<br>    |                |            |          |                    |
| Dec |        |              | E-Sportage<br> |                | BX<br>  | GranCabrio<br>          |                  |                       |                               | Cyberster<br> |                |            |          |                    |

# New Car Models Launches in Spain

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

| Jan |                          |              |                           |            |  |             |  |               |           |                |                    |             |          |
|-----|--------------------------|--------------|---------------------------|------------|--|-------------|--|---------------|-----------|----------------|--------------------|-------------|----------|
| Feb |                          |              |                           |            |  | Scala<br>✓  |  |               |           |                |                    |             |          |
| Mar | Astra Sports Tourer<br>✓ |              |                           |            |  |             |  | Solterra<br>✓ |           |                | Corolla Cross<br>✓ |             |          |
| Apr |                          |              |                           |            |  |             |  |               |           |                |                    | ID.3<br>    |          |
| May | Astra Electric<br>       | 208<br>      |                           |            |  |             |  |               |           |                | Prius<br>          |             |          |
| Jun | Corsa<br>                | 508<br>      | 911 Turbo Hybrid<br>      |            |  |             |  |               | Swift<br> |                |                    | ID.AERO<br> |          |
| Jul |                          | e-308 SW<br> | Cayenne<br>               |            |  | Superb<br>  |  | Crosstrek<br> |           |                |                    | Touareg<br> |          |
| Aug |                          |              | Cayenne Coupé<br>         |            |  |             |  |               |           |                |                    |             |          |
| Sep |                          |              |                           |            |  |             |  | Impreza<br>   |           |                | C-HR<br>           |             |          |
| Oct |                          |              |                           |            |  | Octavia<br> |  |               |           | Cybertruck<br> |                    |             | EX30<br> |
| Nov |                          |              | 718 Boxster Spyder RS<br> | Captur<br> |  |             |  |               |           |                |                    |             |          |
| Dec | Mokka GSe<br>            |              | Macan Electrico<br>       | Escape<br> |  |             |  |               |           |                |                    | T-Cross<br> | EX90<br> |



01. Europe

02. Spain

03. New car models launches in Spain

**04. News on key industry trends**

# News on key industry trends

5 key trends are expected to push the evolution of the automotive industry. For each one in the following slides there is a selection of main news published from 01/03/23 to 17/04/2023



## 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



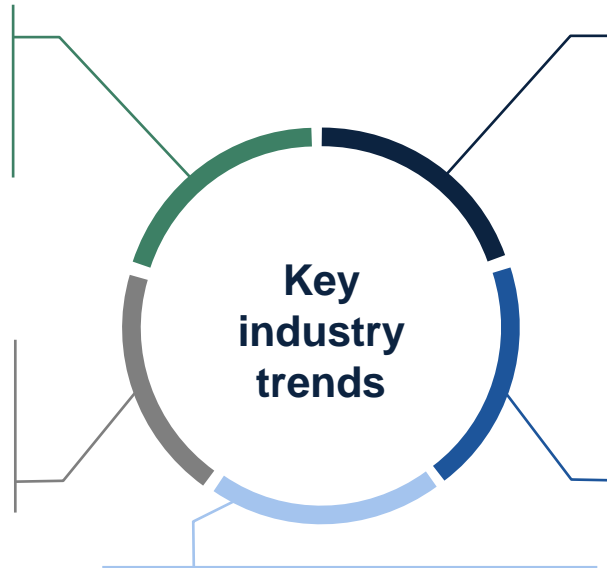
## Electrification

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



Audi integrates store for apps into various models

As of summer 2023, Audi is bringing a store for apps to selected models with the third-generation modular infotainment toolkit (MIB 3). With the embedding of the store, which was jointly developed with Volkswagen subsidiary CARIAD (...)

[Third-Party Apps On Audi Head Units Possible Without Smartphones](#)

Role of Digital Transformation in Automotive Industry

Digital transformation in the automotive industry has many benefits, including increased efficiency, cost savings, and improved customer experience. Digital technologies such as predictive maintenance can help automotive companies identify potential problems (...)

[Benefits of Digital Transformation in Automotive Industry](#)

5 ways how AI is changing the autonomous vehicle industry

Self-driving cars, with the help of AI, can detect any hazards or obstacles in the way to steer out of a possible accident. (...) Through Artificial Intelligence, self-driving cars can communicate with each other and share real-time traffic data (...)

[Artificial Intelligence is currently being used in the vehicle industry to make it more autonomous](#)



# News on key industry trends



## Electrification



### Skoda to Expand Battery System Production in 2023

Škoda Auto has stepped up its e-mobility offensive; the company will be launching three more battery electric vehicles (BEVs) by 2026, with more to follow. Škoda aims to boost the BEV share of deliveries in Europe (...)

[Skoda's strategic plan of electrification](#)

### What does the EU's green technology push mean for the automotive industry?

For carmakers developing and building electric vehicles (EVs), access to rare earth materials and key components remains vital. The EU has recognised the need to keep its industries competitive or risk falling behind countries like China and the US.

[Europe measures to secure the supply of critical raw materials](#)

### Volkswagen Takes its Electric Ambitions Up Another Notch with New Targets for 2030

The electrification strategy will be spearheaded by battery electric vehicles (BEVs), with the Volkswagen brand intending to produce only EVs in Europe by 2033. More immediately, it plans to launch ten new BEV models by 2026, including variants (...)

[Volkswagen objectives: 80% EV sales in Europe and 55% in North America by 2030](#)



# News on key industry trends

## Connectivity



“Hyundai IONIQ 5 represents our shift towards future mobility”

Advancements in connectivity and technologies such as artificial intelligence (AI), the Internet of Things (IoT), cloud computing, and advanced driver assistance systems (ADAS) are fuelling the development of cars of the future.

[Advanced technologies in-car connectivity and infotainment](#)

How connectivity is transforming the automotive industry

To keep up with growing demand, automakers are now offering a broader range of connected features, ranging from in-car entertainment apps to safety-management features. Consumer expectations are rising too, driven largely by the rapid growth (...)

[Why connectivity is now a key factor in purchase decisions](#)

5G Connectivity in Cars – Deutsche Telekom and BMW

Deutsche Telekom and the BMW Group are using Personal-eSIM and MobilityConnect to link vehicle connectivity with the customer’s mobile 5G network, and for the first time on a 5G-basis.

[Solution, benefits and why 5G is needed in automotive industry](#)

# News on key industry trends



## Mobility Services

New distance-based fee solution from Abertis Mobility Services

The program seeks to promote intelligent, connected mobility, and expand the sure of shared transport and active travel.

[Abertis Mobility Services \(AMS\) tests a new distance-based fee solution for cities to promote public transport and active mobility](#)

Mobility as a Service (MaaS) empowering intermodal mobility

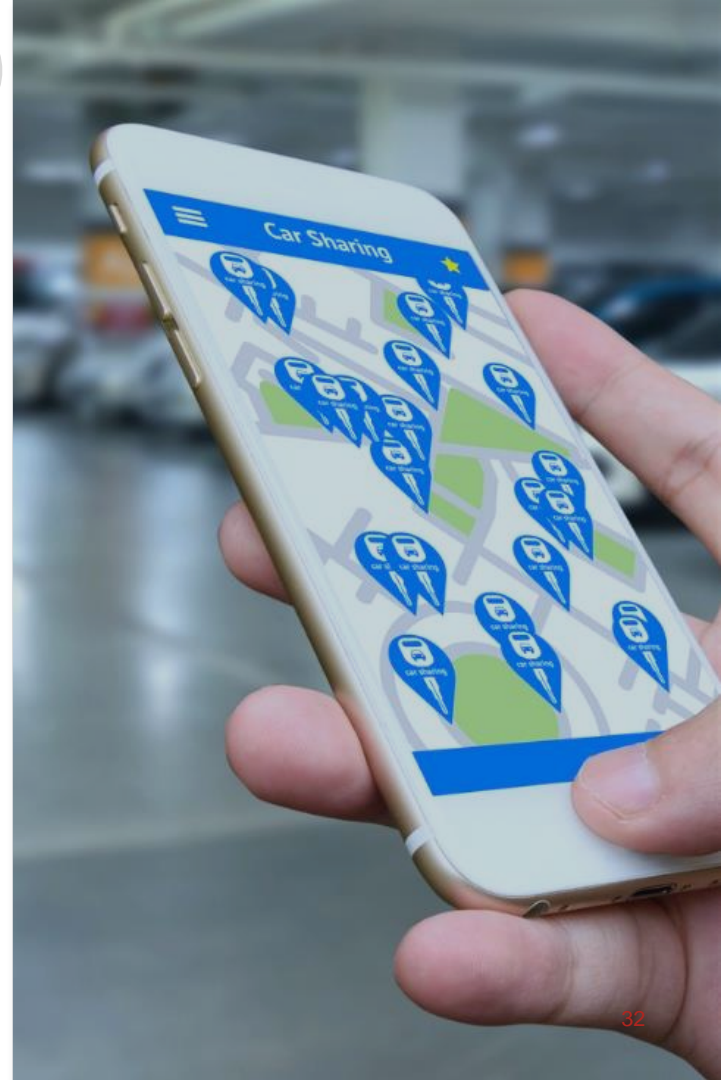
Mobility as a Service combines intelligent journey planning, seamless integration of ticketing and booking as well as big data analytics combined in flexible and secure MaaS apps.

[New model of Mobility as a Service](#)

Madrid 360: Sustainable and accessible mobility for all

The Sustainable Mobility Plan 360 pursues a markedly intermodal mobility system, which enables the distribution of the current and future demand among all modes of transport (...)

[Mobility services in Madrid before 2030](#)





# News on key industry trends

## Sustainability



The drive for sustainability in a challenging automotive market

Carmakers have recognised the need to act, redirecting resources to make operations climate-neutral and increase their sustainability efforts. However, the image of some companies remains tarnished by legal action (...).

[Sustainability situation in the automotive industry in 2023](#)

Spanish Government commitment to ecological transition

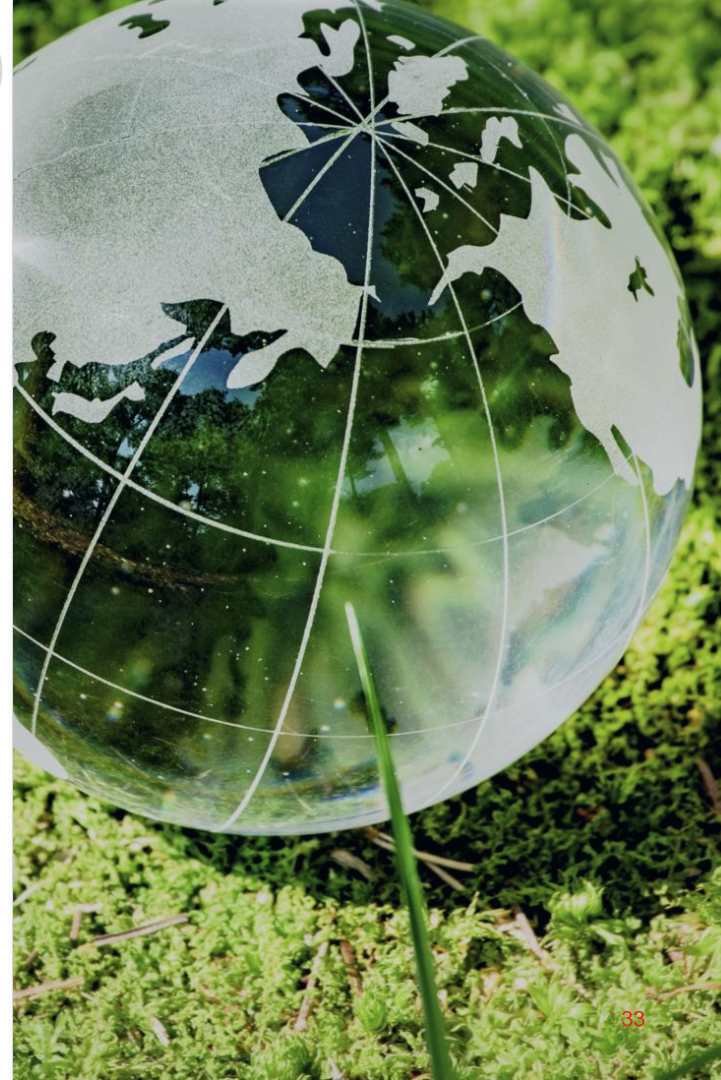
Laying of the first stone of the Volkswagen Group's battery gigafactory in Sagunto, Valencia. (...) the project is an example of the government's commitment to ecological transition, reindustrialization and innovation as the driving forces (...)

[Volkswagen Group's 'PowerCo' battery company's gigafactory in Sagunto](#)

Accelerating sustainability across the automotive value chain

Current trends such as the electrification of vehicles and carbon neutral manufacturing demonstrate the growing importance of sustainability in the automotive industry. These trends are not just driven by the introduction of stricter emissions regulations, (...)

[Key issues in the transition to low carbon mobility](#)



## Thank you.

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