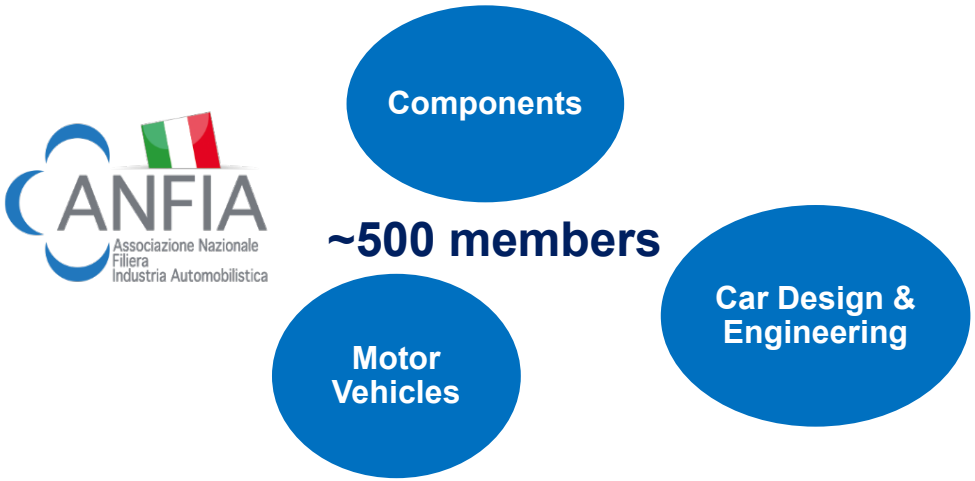
ANFIA
Associazione Nazionale
Filiera
Industria Automobilistica

Business Forum
Italy - China

Verona, 12th april 2024

Who we are: 112 Years of history!



Main activities

- ✓ Institutional Relations
- ✓ Regulatory Affairs and Technical Legislation
- ✓ Studies and Statistics
- ✓ Business, Financial and Legal Issues
- ✓ Internationalization and Trade
- ✓ Consulting and Training services
- ✓ Communication and Events

ANFIA represents the automotive sector and the interests of its associate members with national and international institutions and maintain an open, transparent and regular dialogue with all the mobility and transport stakeholders

Creating value for the automotive and mobility world

Who we represent: the Italian automotive sector in figures

Automotive Industry
(manufacturing and production)



5,439
companies



272,000
Production employees

9.5 Bn€
wages



100.6 Bn€
Turnover

11.5% of **manufacturing sector**

5.6% of **GDP**



The industrial sector with **the highest value added multiplier**

Automotive Sector
(manufacturing and production + service industry)



1.28 million
employees

28.8 Bn€
wages



346.4 Bn€
Turnover

19.4% of **GDP**



71 Bn€
2022 Fiscal burden

- ✓ **55.3 Bn€ Use**
- ✓ **8.6 Bn€ Purchase**
- ✓ **7.2 Bn€ Ownership**

[1] Source: Observatory on Automotive Components in Italy - 2023 Ed.

The Italian Components industry in Italy: a unique and complete supply chain

"from concept to car"

2.167 companies

- ✓ Export: 23.5 bn €
- ✓ Import: 18.3 bn €
- ✓ Trade balance: +5.2 bn €

55.9 billion € turnover

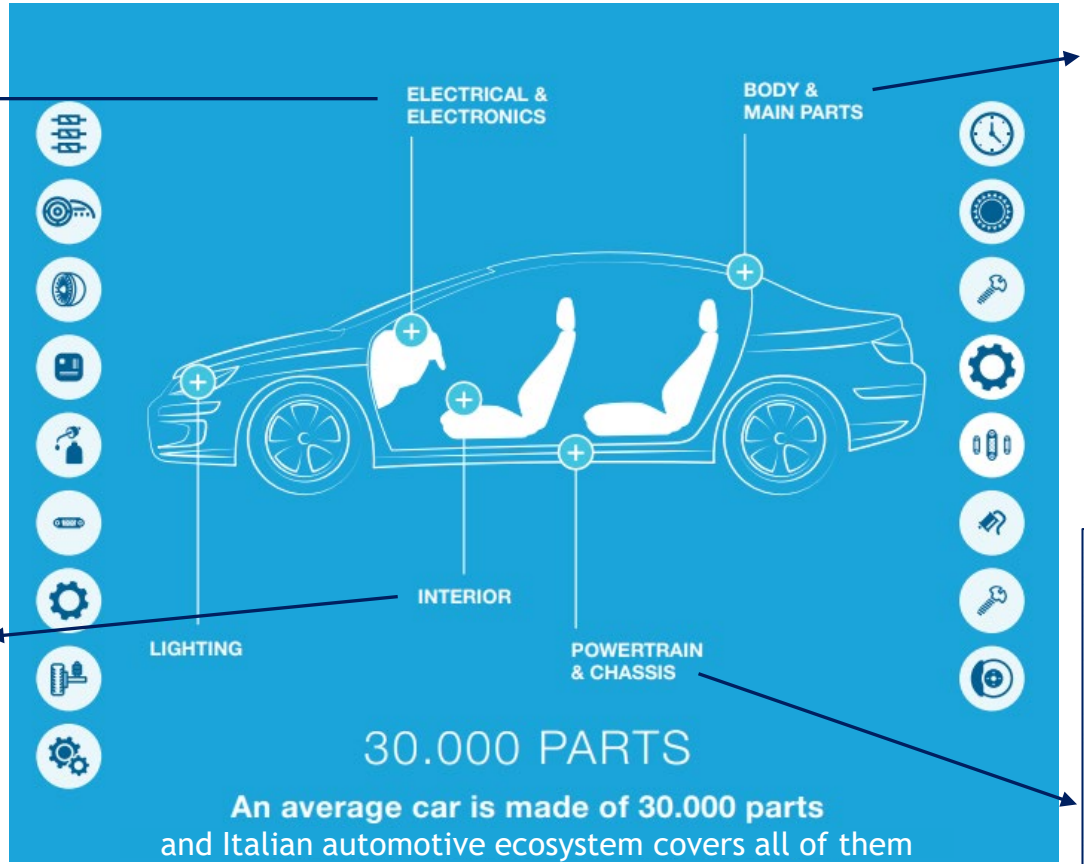
168.000 direct employees



- ✓ **Global leadership in particular on ICE**
- ✓ **Export oriented**
- ✓ **Over 20 years of positive trade balance**

Source: Observatory on Automotive Components in Italy - 2023 Ed.

A typical car consists of 5 main modules



- Power and engine management
- Body electronics
- Chassis, ADAS, AD electronics
- Communication and entertainment
- Connectivity and telematics
- Safety electronics

- Passenger cell
- Front structure
- Rear structure
- BIW (Body-in-white)

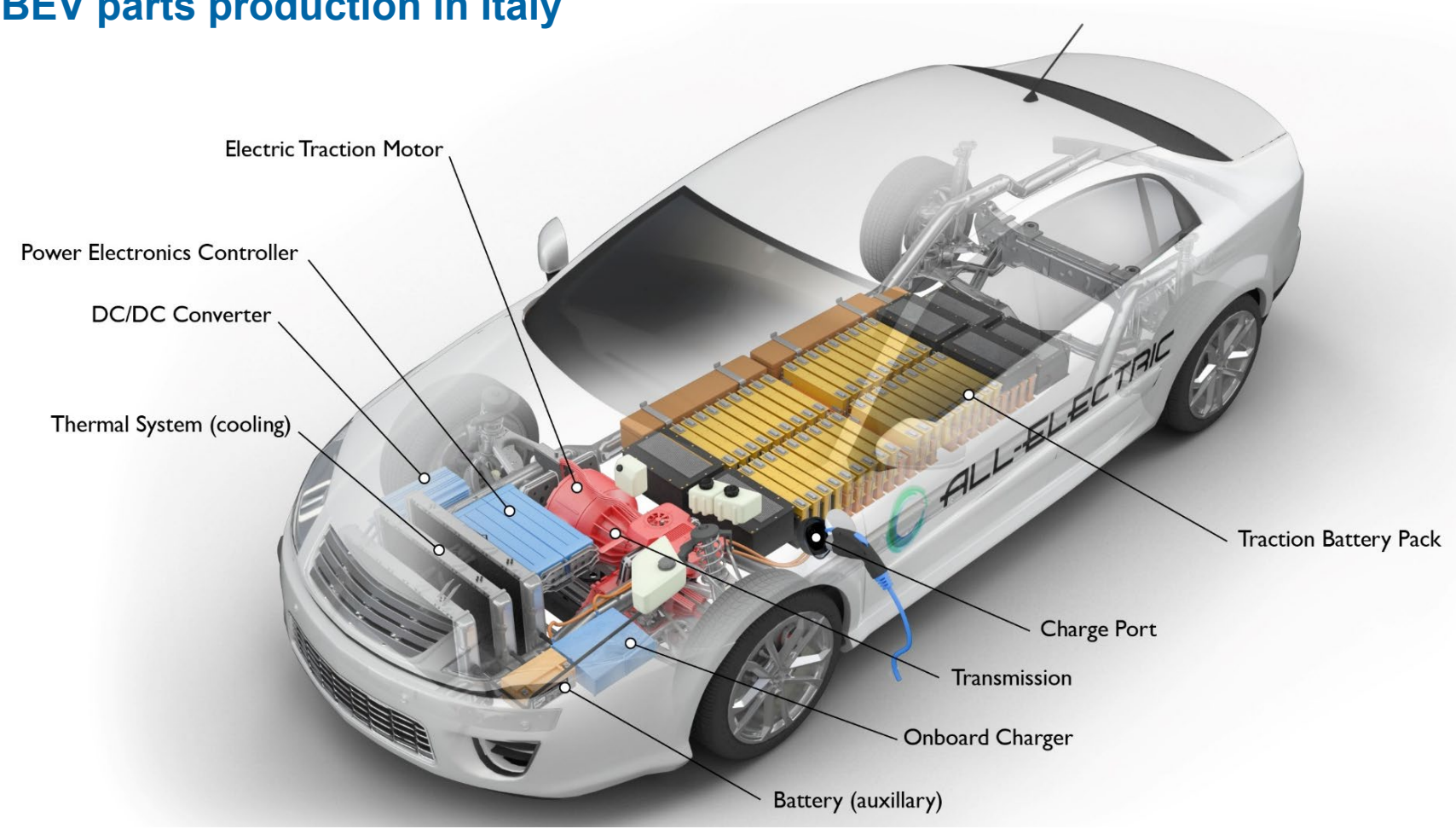
- Roof system
- Body shell and doors
- Front/trunk lid
- Front/rear end
- Exterior trim
- Mirrors
- Lighting system
- Locking, latches
- Windows, glass
- Wiper Systems

- Seats
- Cockpit
- Passive safety
- Doors
- HVAC
- Roof module
- Interior lighting
- Driver control system
- Interiors trims

- ICE: Drivetrain
- ICE: Transmission
- ICE: Base engine
- Fuel supply
- Thermal Management
- Exhaust system
- xEV: Power Electronics, Inverter, Charger, and HV Cables
- xEV: Battery pack
- Tires
- Braking
- Steering
- Suspension and axles
- Wheels

Source: CLEPA

BEV parts production in Italy



Main points of the “Italian Automotive plan 2030”

ANFIA Associazione Nazionale Filiera Industria Automobilistica

Ministero delle Imprese e del Made in Italy

- ☑ Increase the production of the cars and vans in Italy
- ☑ Support the investments for transition and research & development on new technologies
- ☑ Attract investments of OEM or suppliers in Italy
- ☑ Reskilling and upskilling of workers
- ☑ Support the development of electric and hydrogen mobility

  (market incentives and dissemination of charging points and refuelling infrastructure)

Some Italian automotive companies already located in China





























Some Chinese automotive companies already located in Italy























Thanks for Your attention!

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