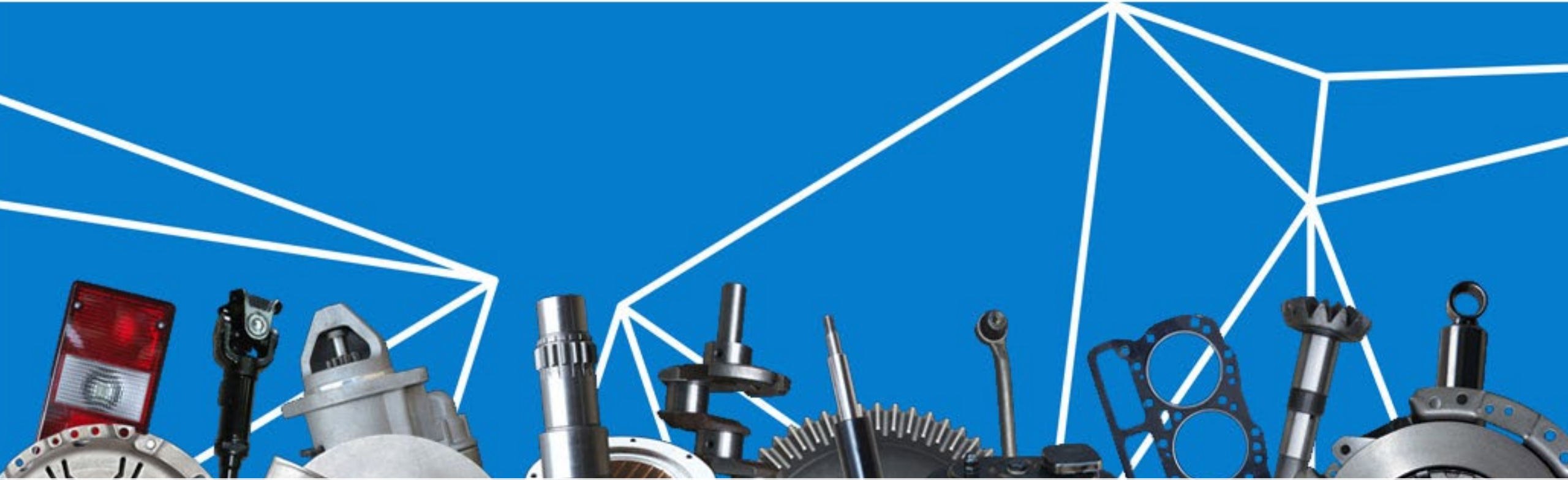
Osservatorio sulla componentistica automotive italiana 2022

CAMERA DI COMMERCIO
INDUSTRIA ARTIGIANATO E AGRICOLTURA
DI TORINO

ANFIA
Associazione Nazionale
Filiera
Industria Automobilistica



Scenari Internazionali e Nazionali

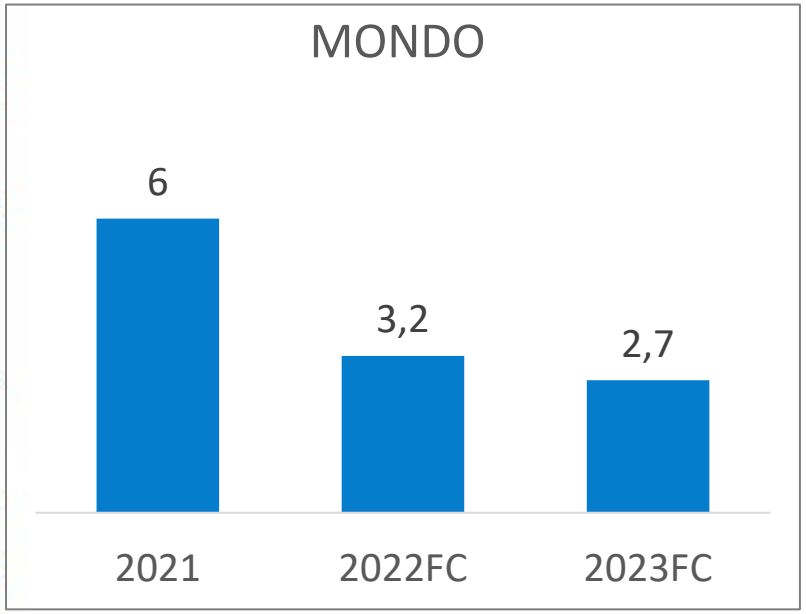
Lo scenario macroeconomico mondiale

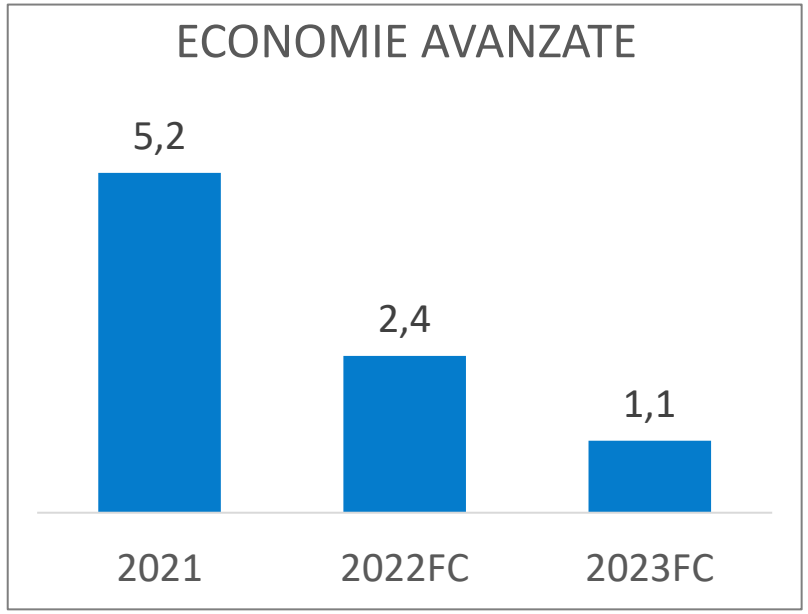
Osservatorio sulla componentistica automotive italiana 2022

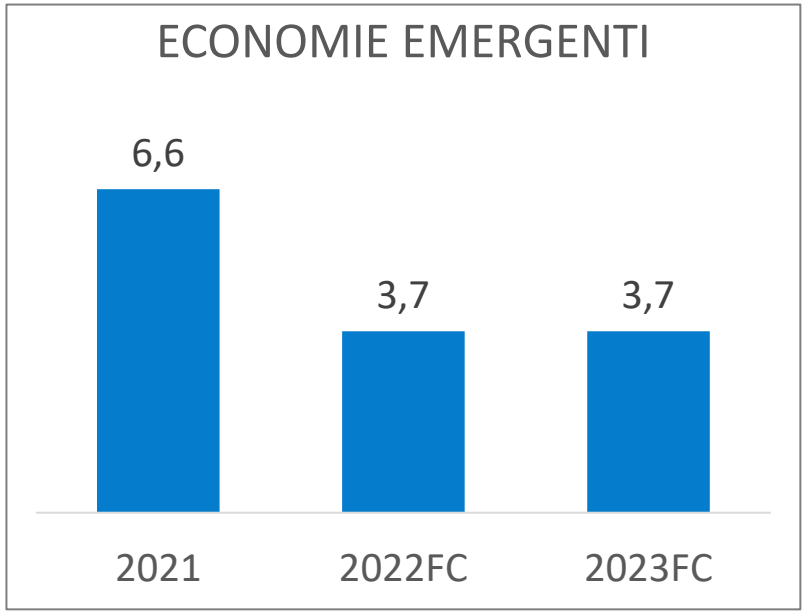
Lo scenario macroeconomico mondiale

PIL

Variazioni % annuali

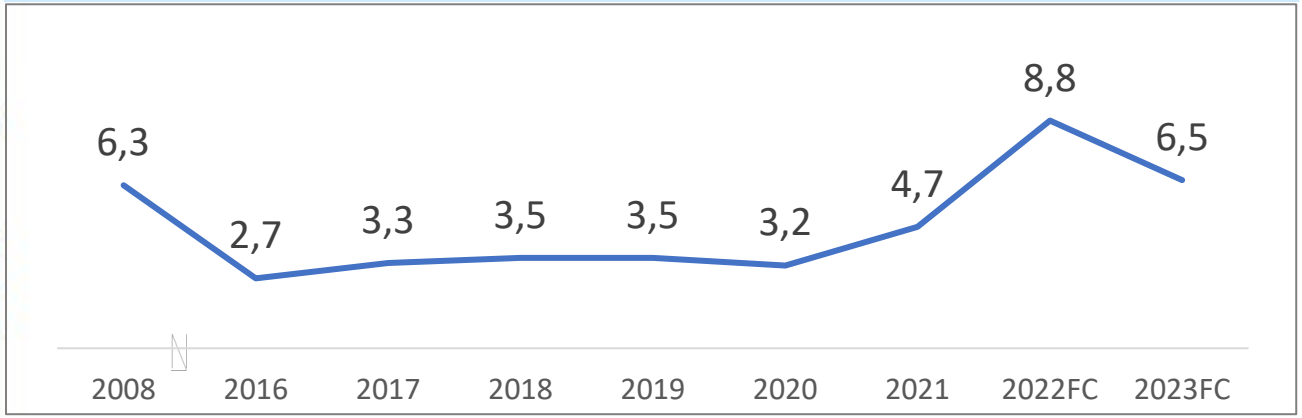






INFLAZIONE

Variazioni % annuali



	2019	2020	2021	2022	2023
Trade	0,9	-7,8	10,1	4,3	2,5

Volume (beni e servizi). Variazioni % annuali

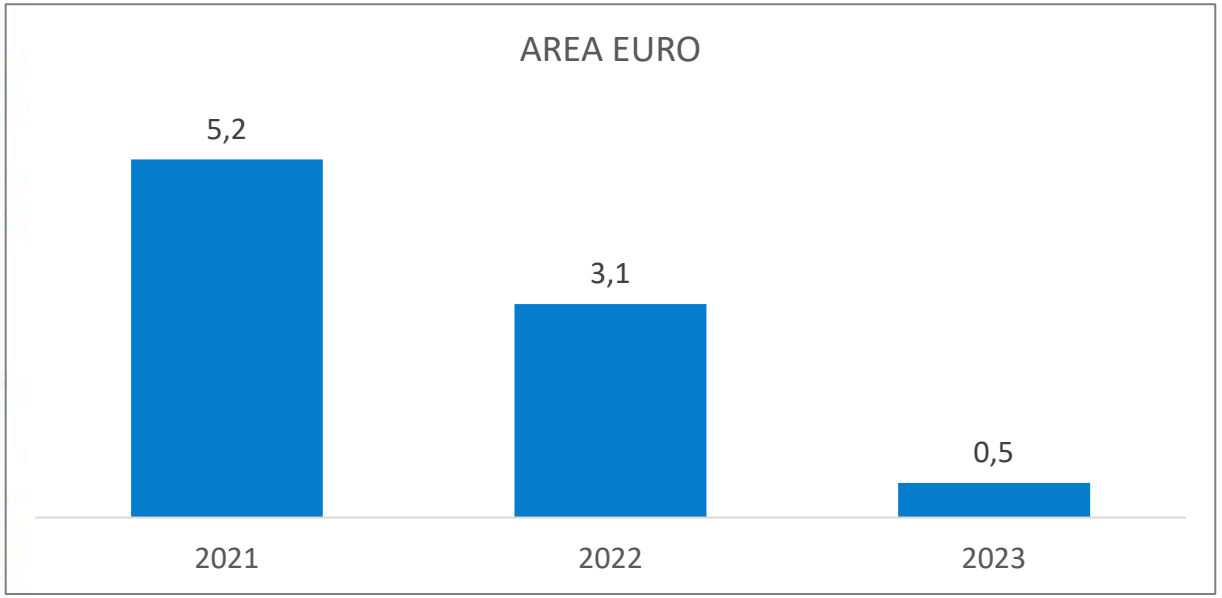
Petrolio	61,21	41,83	69,42	98,19	85,52

Media prezzi UK Brent, Dubai e WTI (USD/barile)

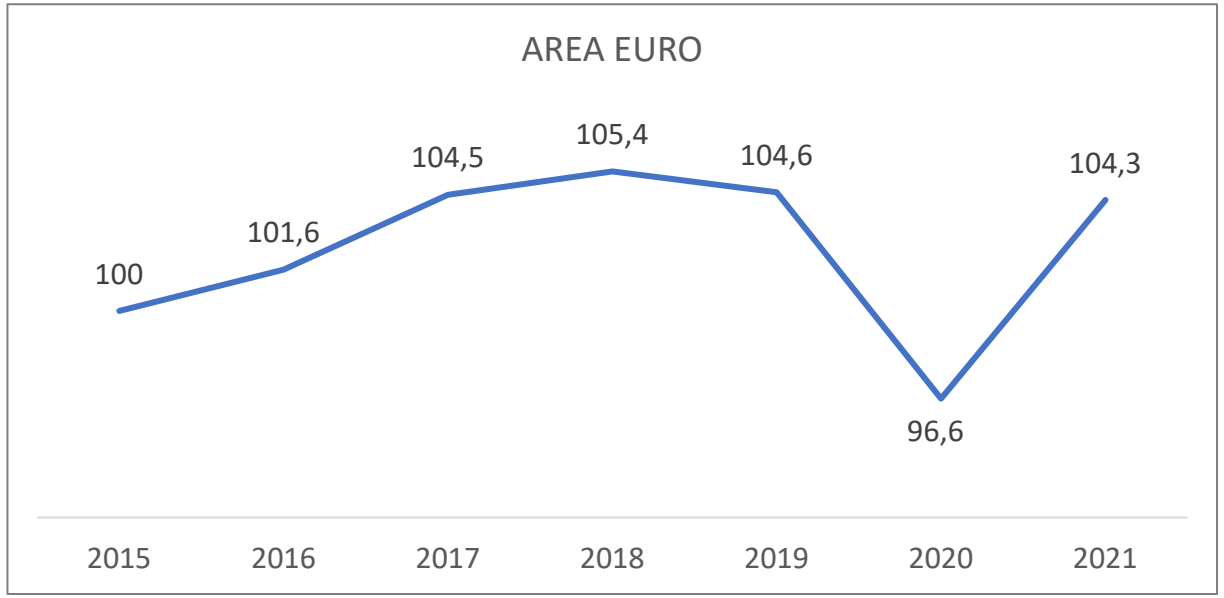
Fonte: FMI, World Economic Outlook, ottobre 2022

Lo scenario macroeconomico europeo

PIL — Variazioni % annuali



PRODUZIONE IND.LE — Indice 2015=100



PIL	2021	2022	2023
Germania	2,6	1,5	-0,3
Francia	6,8	2,5	0,7
Italia	6,6	3,2	-0,2
Spagna	5,1	4,3	1,2

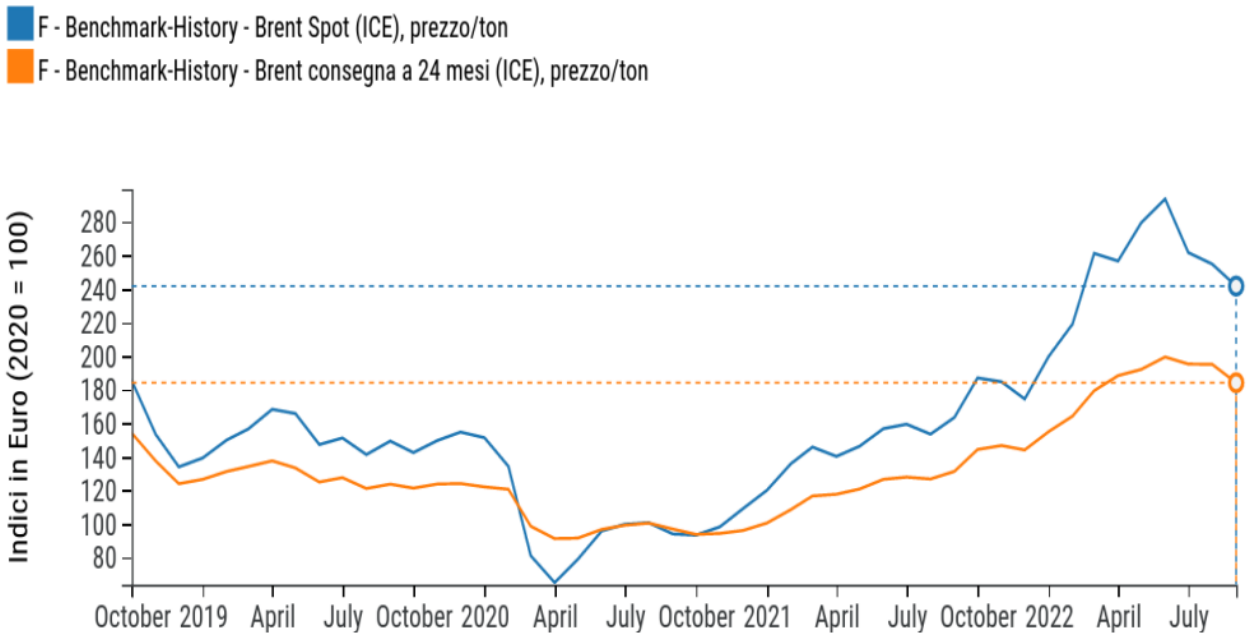
Prod. Ind.	2015	2016	2017	2018	2019	2020	2021
Germania	99,7	100,6	103,7	104,7	101,3	91,6	95,9
Francia	100,0	100,5	102,8	103,5	104,0	92,7	98,1
Italia	100,0	101,9	105,6	106,5	105,3	93,3	104,7
Spagna	100,0	101,7	105,0	105,4	106,0	95,6	102,8

Fonte: FMI, World Economic Outlook, ottobre 2022; EUROSTAT

Aumento dei prezzi energetici

Petrolio Brent (ICE)

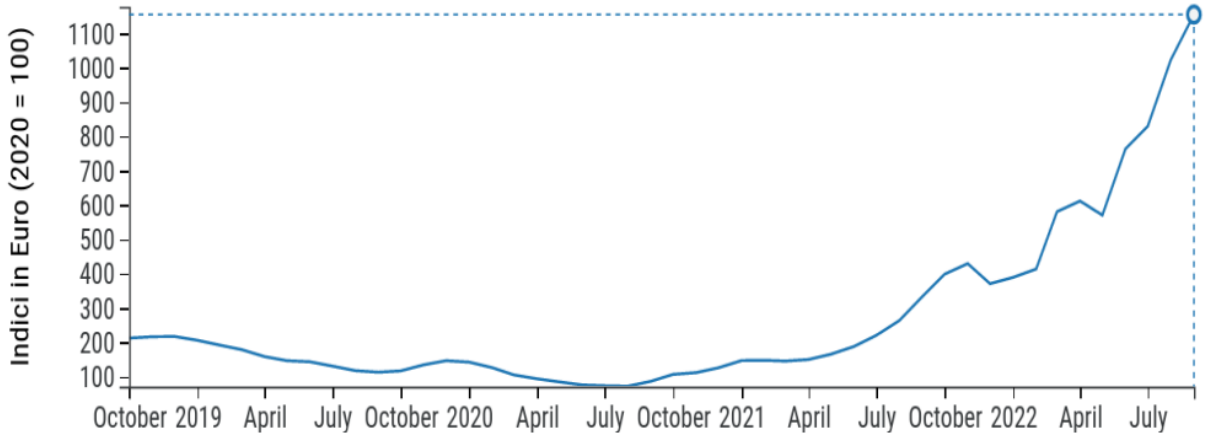
	Livello (EUR/Ton) Set. 2022	Evoluzione storica 3 mesi	1 anno
F - Brent Spot (ICE), prezzo/ton	654.0	-6.4 ↓	47.9 ↑
F - Brent consegna a 24 mesi (ICE), prezzo/ton	550.0	-2.6 ↓	40.3 ↑



Gas naturale

D - Benchmark-History - Gas naturale

Indice € 2020=100



	Livello (EUR/Ton) Set. 2022	Evoluzione storica 3 mesi	1 anno
D - Gas naturale	2052.0	15.0 ↑	246.9 ↑

Fonte: Pricepedia, settembre 2022

2021 key figures

80 mln di autoveicoli

+3,1% vs. 2020

-18,3% vs. 2017

(**-18** mln di autoveicoli)

71,2% sono PCs

(nel 2017 erano il 75%)

26,1 mln **+3,4%** vs. 2020

MS **32,5%** della prod. mondo

13,0 mln **-5,1%** vs. 2020

MS **16,3%** della prod. mondo

9,2 mln **+3,9%** vs. 2020

MS **11,4%** della prod. mondo

7,8 mln **-2,7%** vs. 2020

MS **9,8%** della prod. mondo

Elaborazioni ANFIA Studi e Statistiche su dati OICA

H1.2022

39,3 mln di autoveicoli

-2,8% vs. H1.2021

70,8% sono PCs

FC 2022: **-2,1%** vs. 2021

12,1 mln **-3,7%** vs. H1.2021
MS **30,8%** della prod. mondo

6,7 mln **-7,7%** vs. H1.2021
MS **17,0%** della prod. mondo

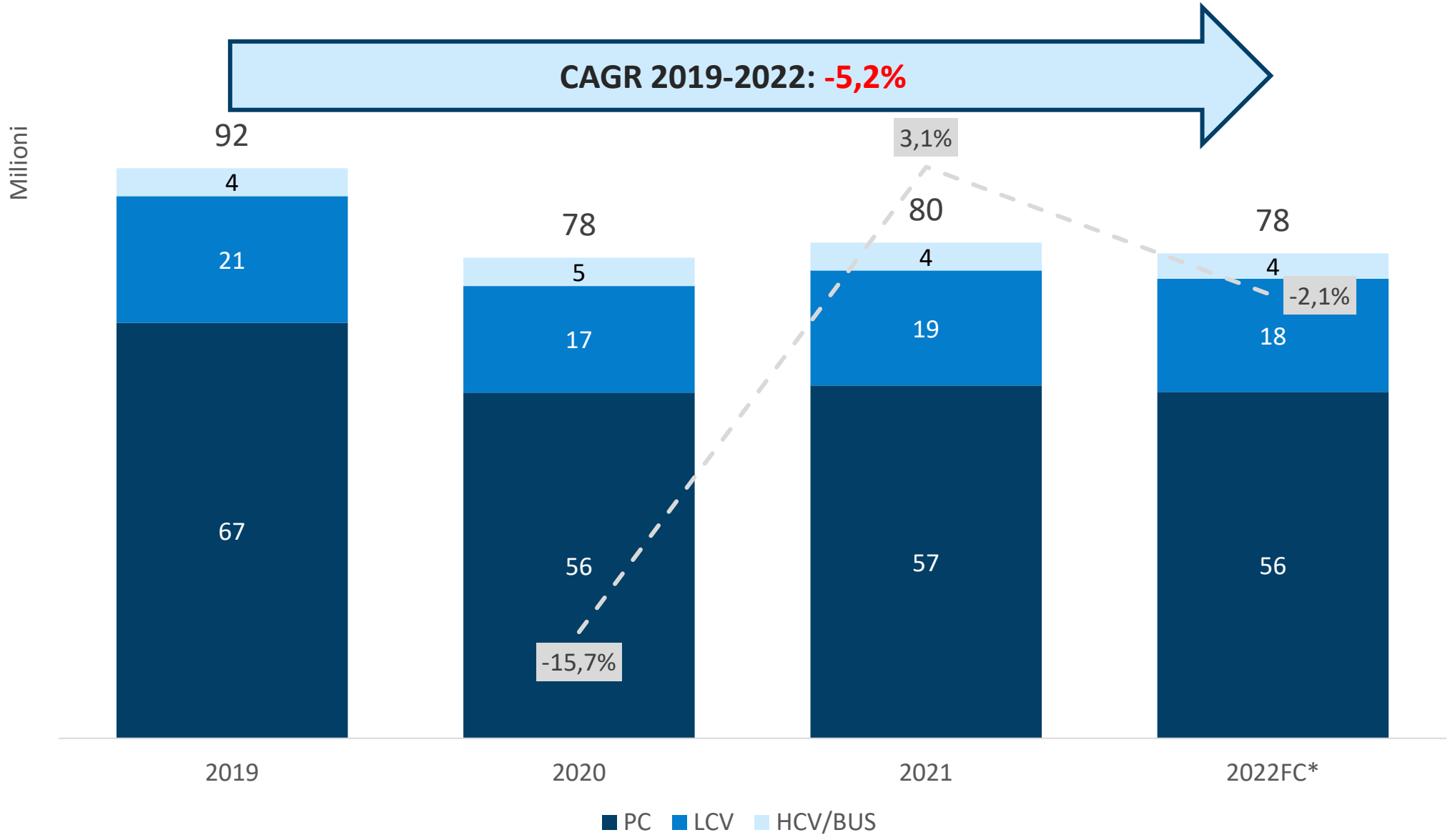
4,9 mln **+4,1%** vs. H1.2021
MS **12,6%** della prod. mondo

3,6 mln **-14,0%** vs. H1.2020
MS **9,2%** della prod. mondo

Elaborazioni ANFIA Studi e Statistiche su dati OICA/Fitch Solutions

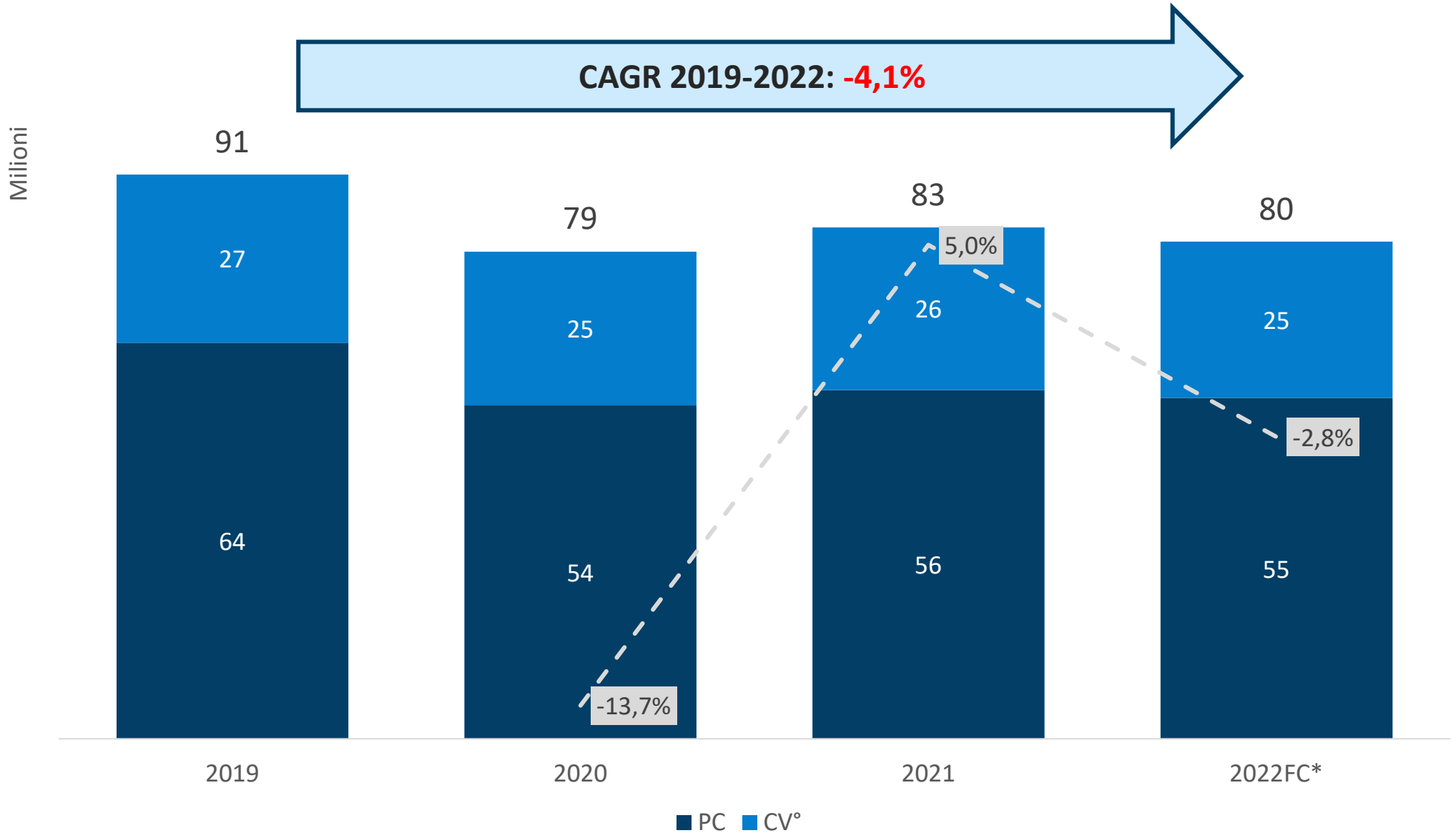
La produzione mondiale di autovetture

BACKUP



Elaborazioni ANFIA Studi e Statistiche su dati OICA
* Previsioni Fitch Solutions (update 26/08/2022)

La domanda mondiale di autoveicoli



Elaborazioni ANFIA Studi e Statistiche su dati OICA
* Previsioni Fitch Solutions (update 26/08/2022) ° include LCV, HCV e bus

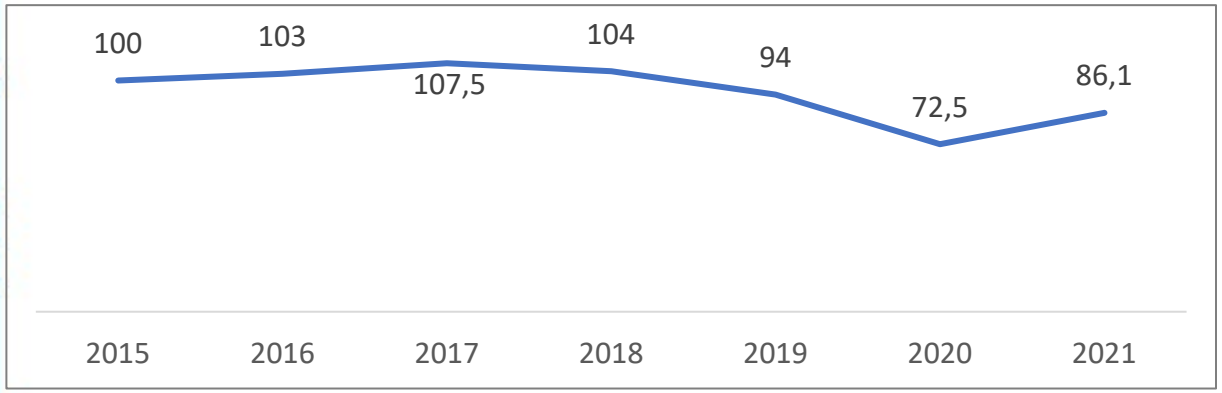
Key Figures 2021

796 mila autoveicoli

+2,4% vs. 2020

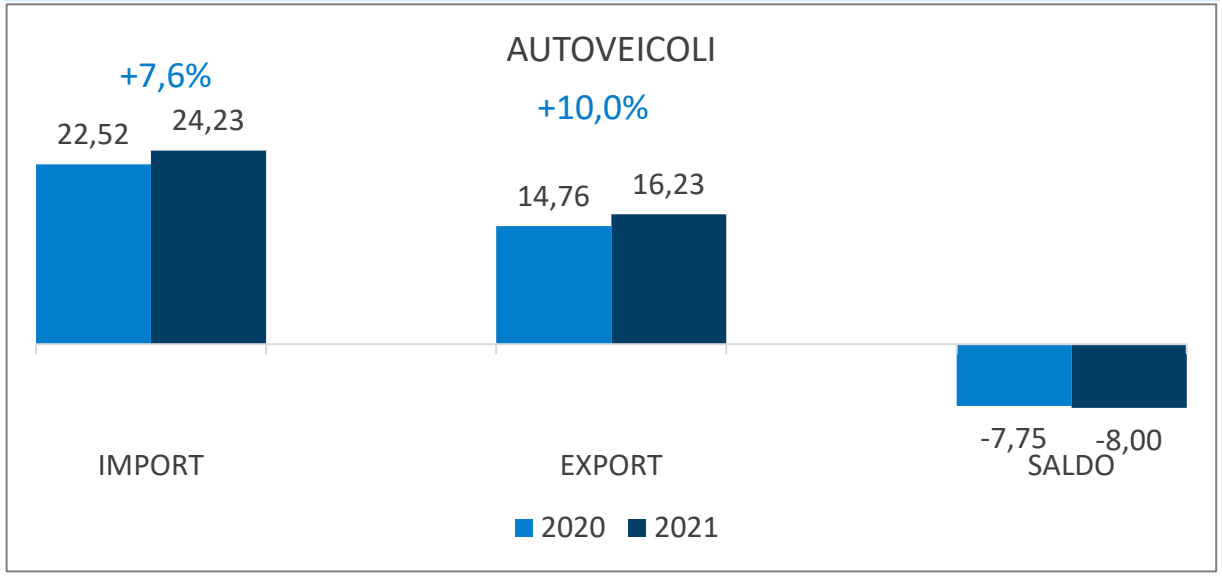
442 mila PC	**-2,1%**
290 mila LCV	**+4,7%**
63 mila HCV+Bus	**+31,8%**

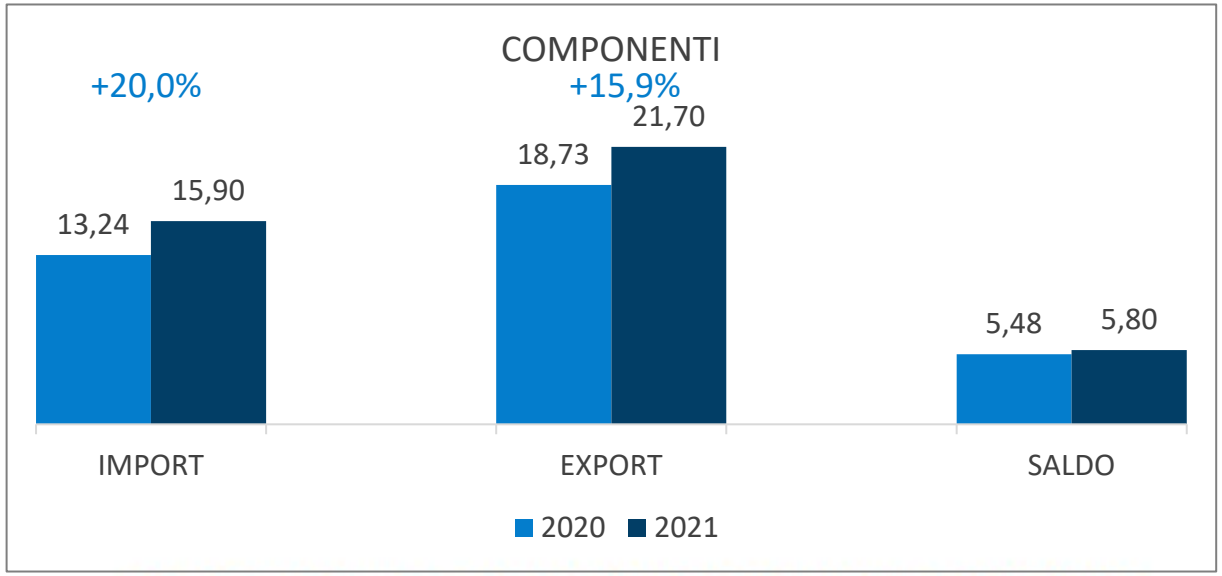
PRODUZIONE IND.LE AUTOMOTIVE



IMPORT/EXPORT

Mld Euro





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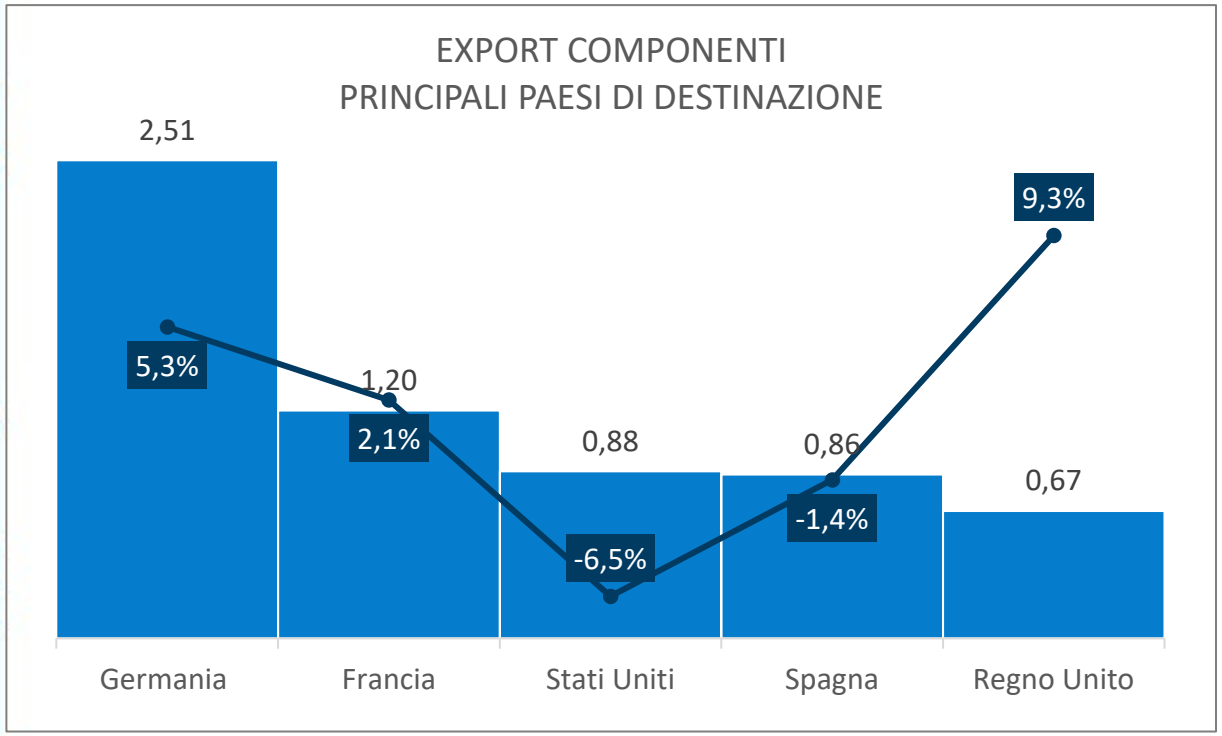
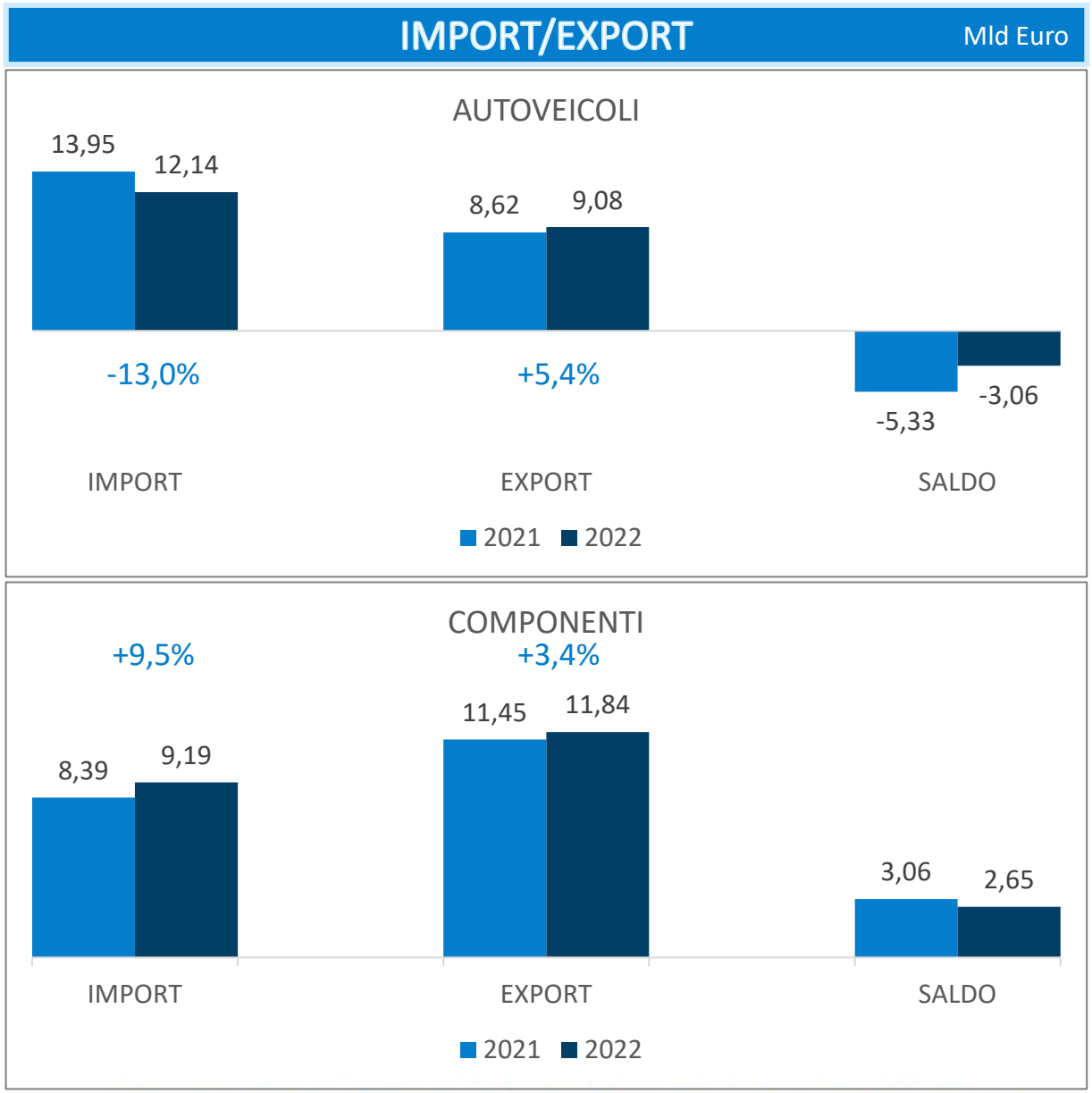
H1.2022

389 mila autoveicoli

-15,7% vs. H1.2021

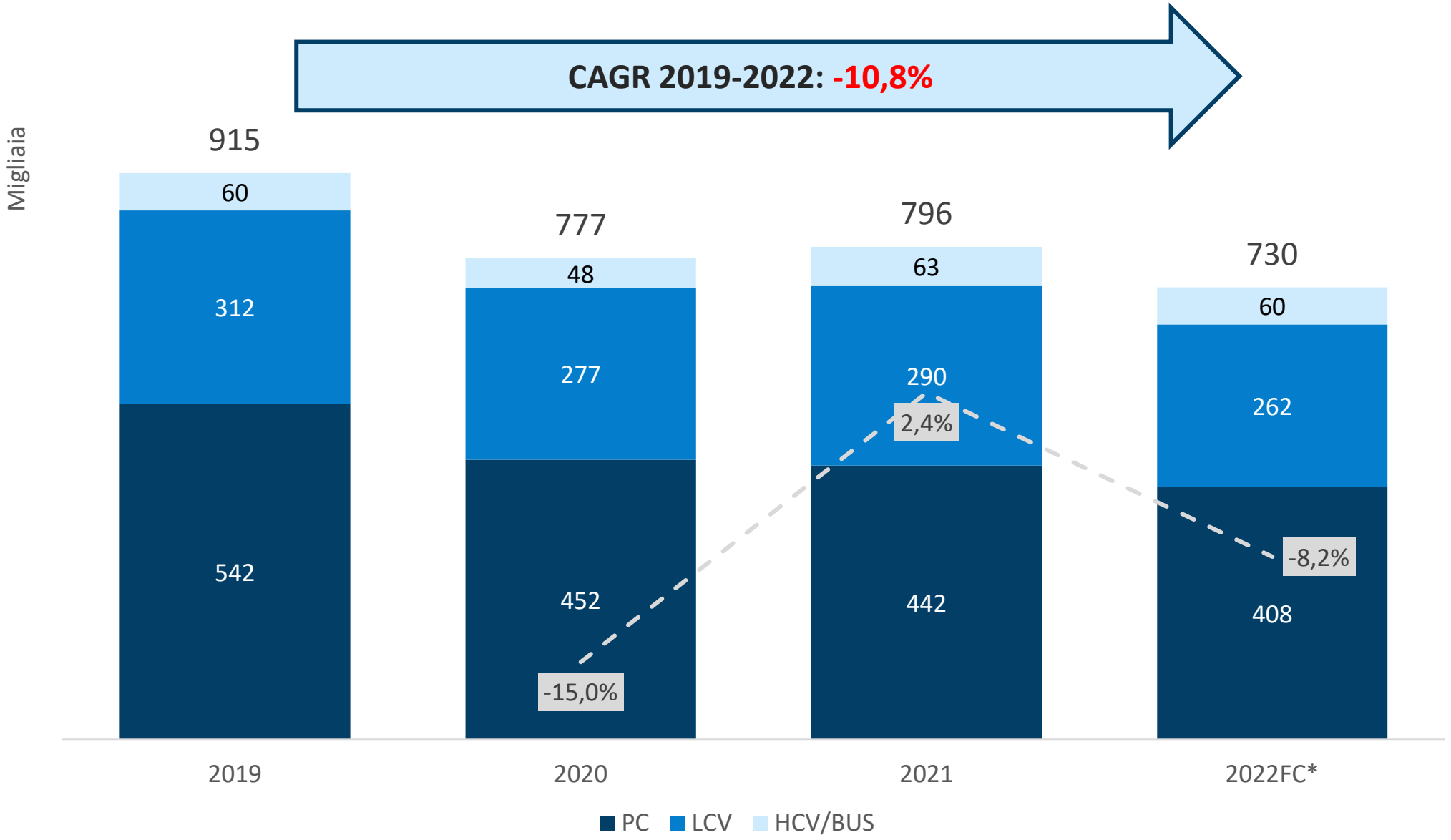




Osservatorio sulla componentistica automotive italiana 2022

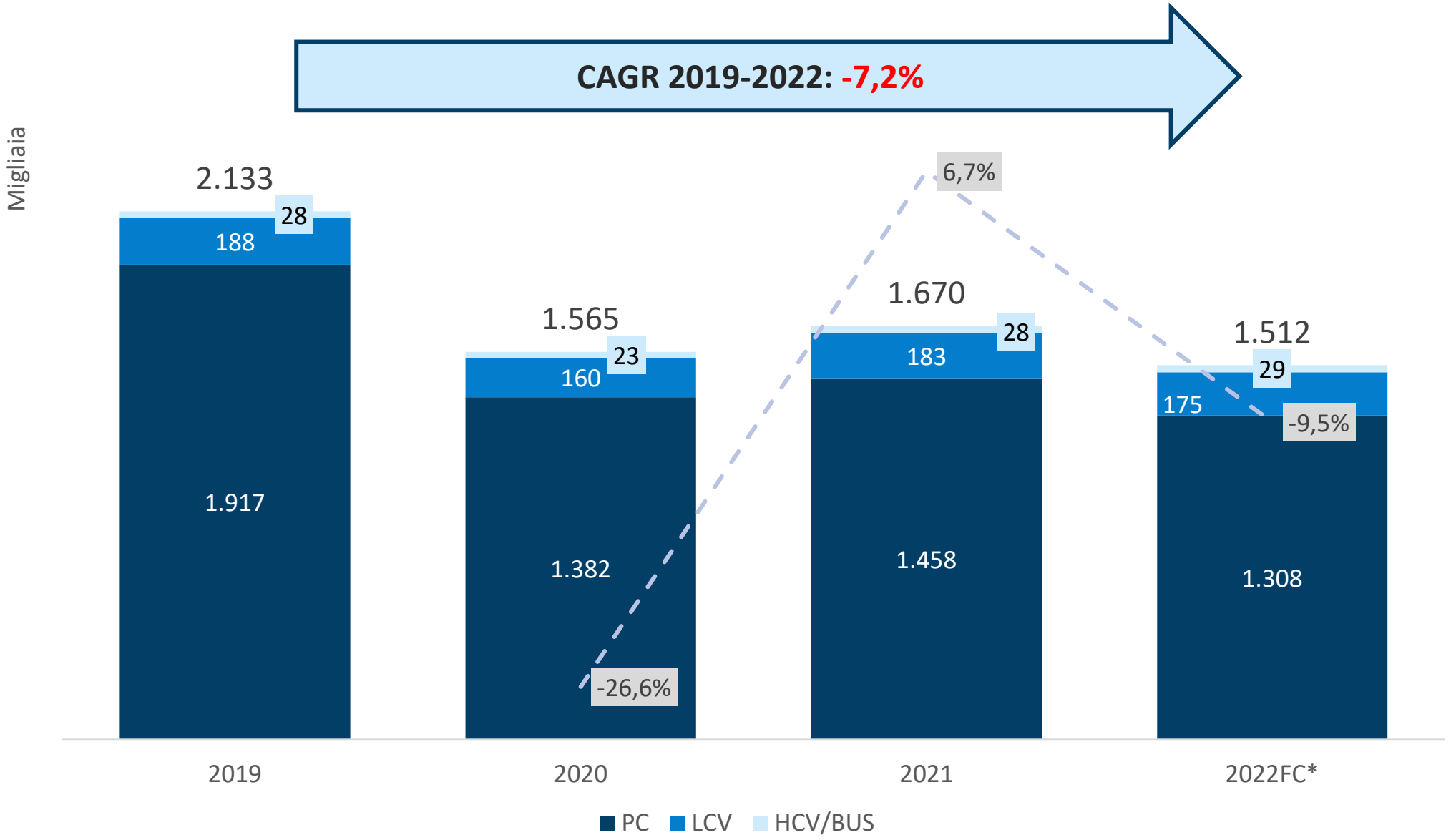
La produzione di autoveicoli in Italia

BACKUP



Elaborazioni ANFIA Studi e Statistiche
* Previsioni Fitch Solutions (update 26/08/2022)

La domanda di autoveicoli in Italia



Elaborazioni ANFIA Studi e Statistiche su dati MIMS (Aut.Min. D07161/H4)
* Previsioni Fitch Solutions (update 26/08/2022)

KEEP IN TOUCH

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