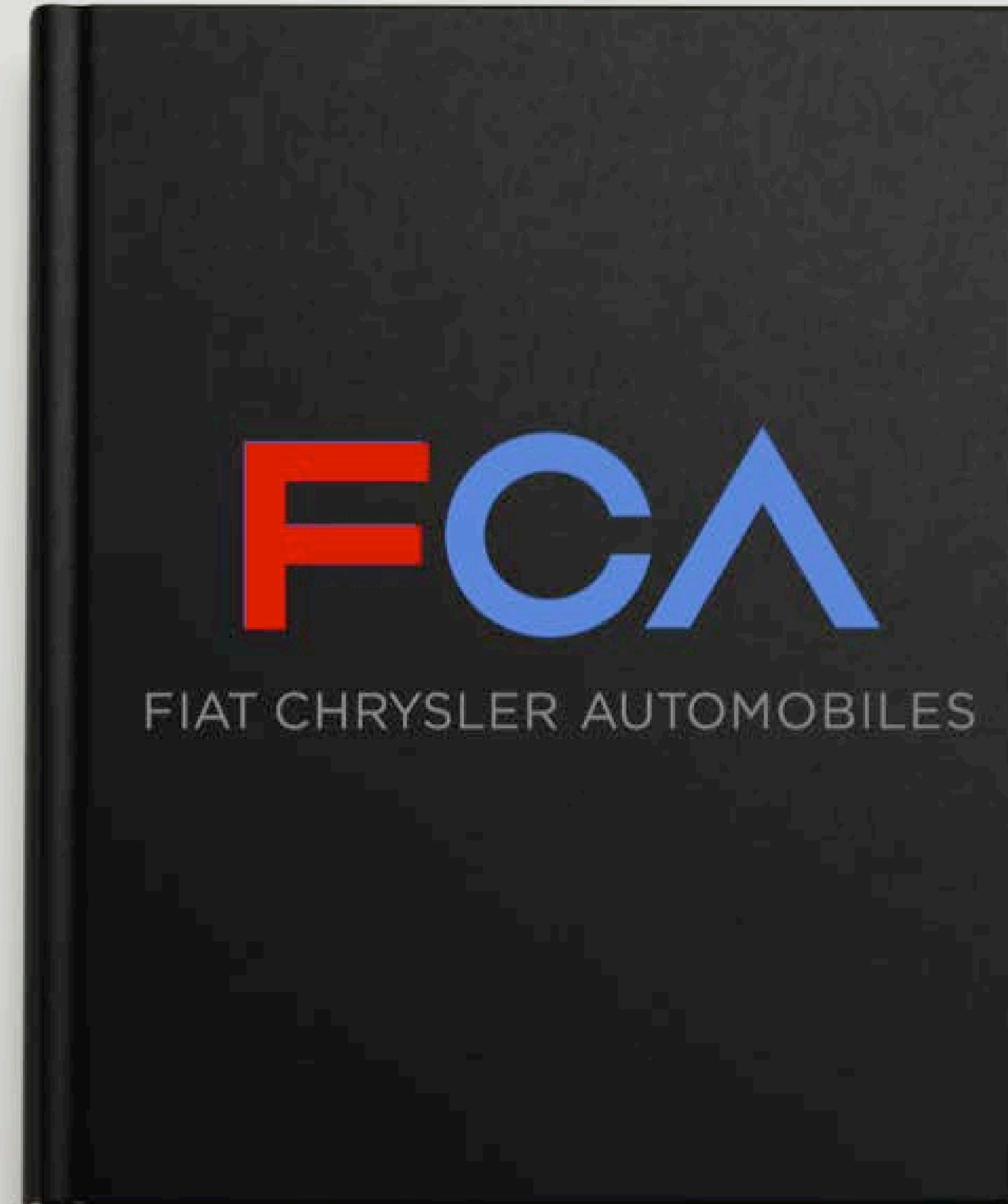
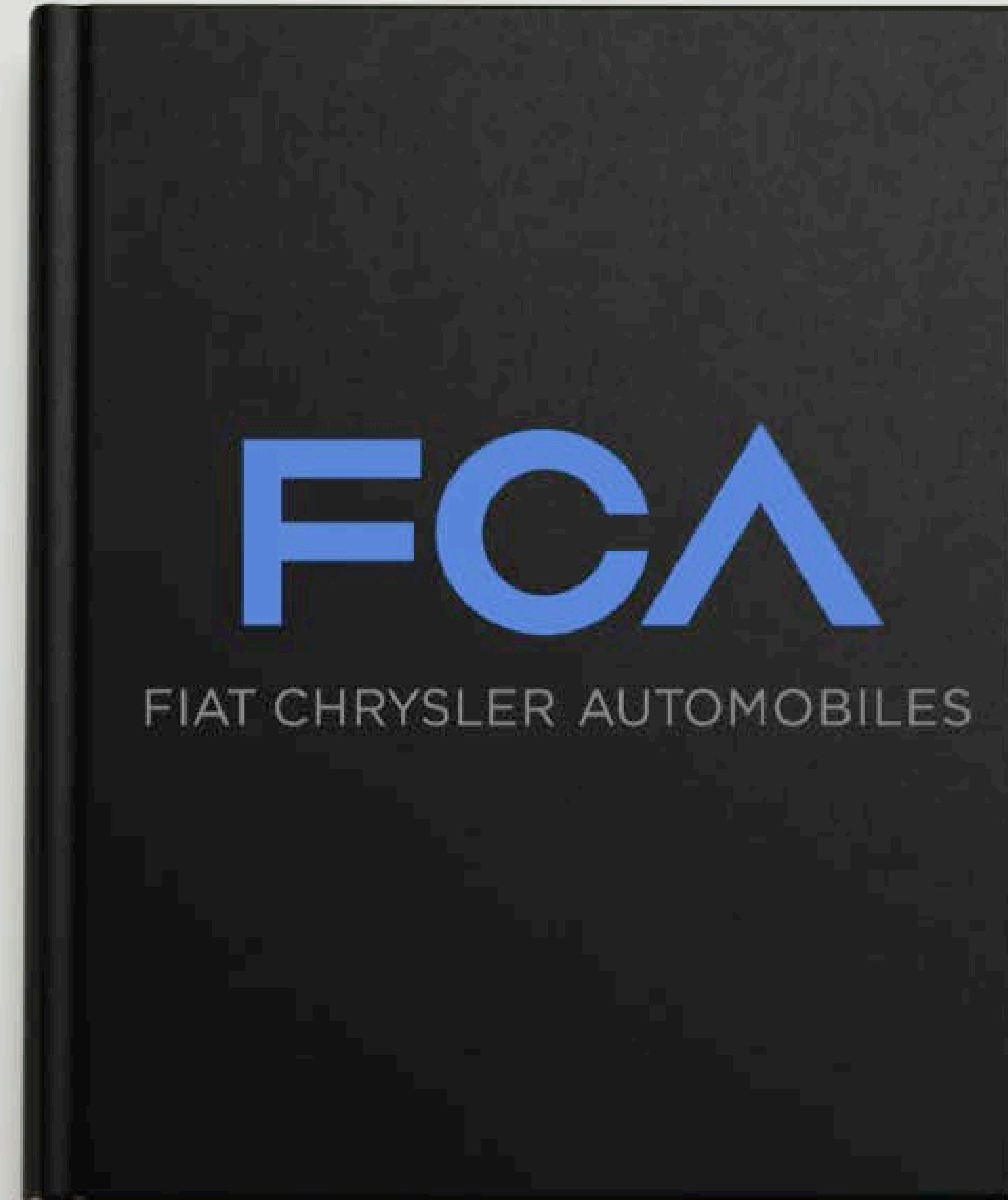
NEW PANDA AND PUNTO YOUNG.
A LITTLE TOUCH OF HAPPINESS. FROM ITALY.

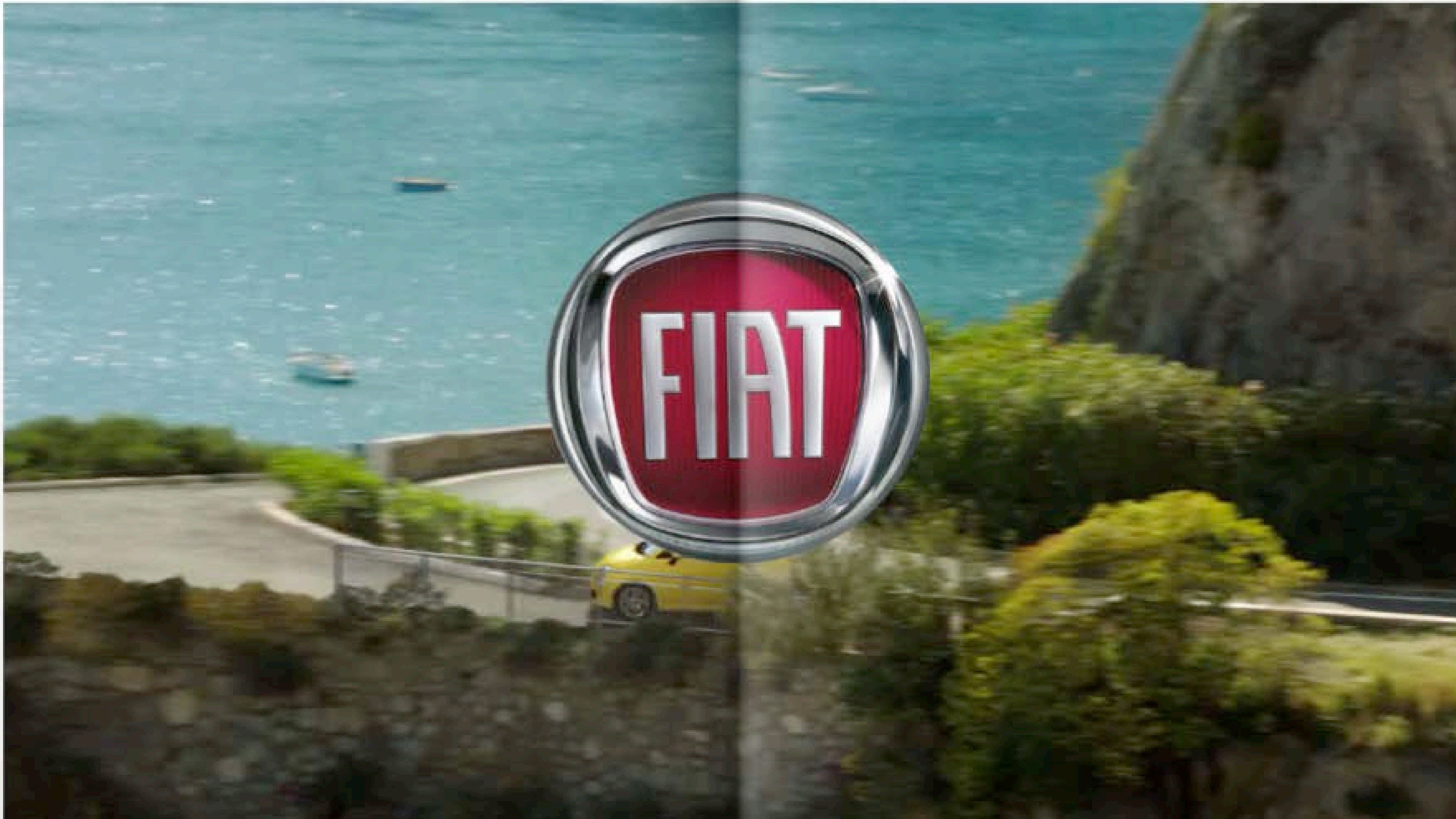

57


FIAT
OUR FIAT STORY

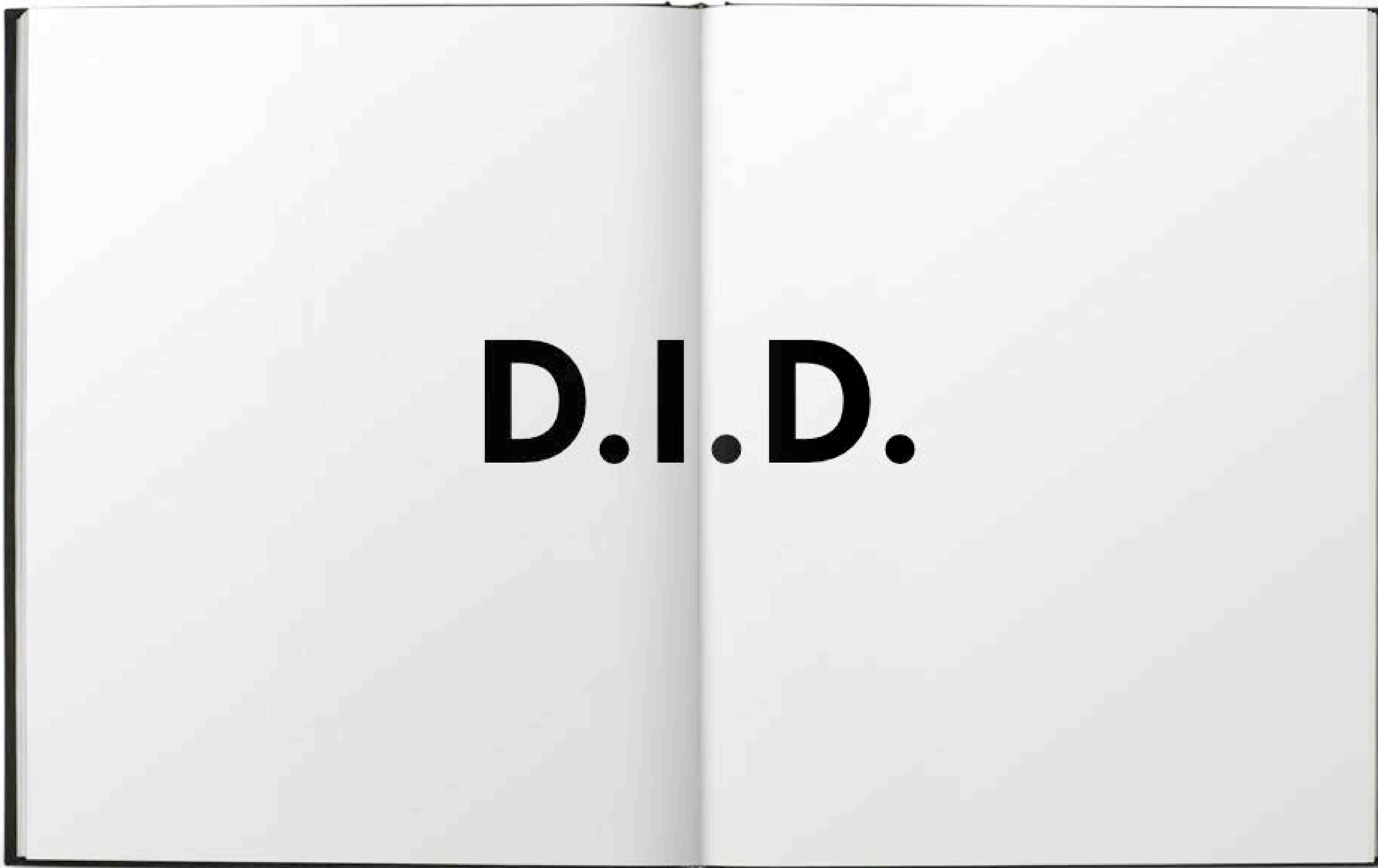

FCA
FIAT CHRYSLER AUTOMOBILES


FCA
FIAT CHRYSLER AUTOMOBILES


FIAT
OUR FIAT STORY


FIAT

"A DISSOCIATIVE IDENTITY DISORDER?"


D.I.D.

MASERATI

FIAT®

Ferrari


RATIONAL
FUNCTIONAL
FIAT
EMOTIONAL
ASPIRATIONAL

FIAT

TWO OF A KIND

SNAPSHOT OF TODAY

TWO MISSIONS

ONE VISION

THE PLAN

THE PRESS

THE WALL STREET JOURNAL. | BUSINESS

AUTOS · INDUSTRY

Fiat Will Shrink Spending in Europe

By CHRISTOPH RAUWALD and GILLES CASTONGUAY

THE WALL STREET JOURNAL. | BUSINESS

AUTOS · INDUSTRY

Fiat Delays Launch of Two Models

By GILLES CASTONGUAY

CORRIERE DELLA SERA

Economia

IL FUTURO DELLA FIAT

14 settembre 2012 | 10:40

Fiat e l'addio a «Fabbrica Italia» I colpi del mercato e quei modelli che mancano

La caduta del mercato non è colpa

Ma la scelta di non investire sulle

Il Sole 24 ORE

Italia&Mondo | Norme e Tributi | Finanza&Mercati | Nova

18 MARZO 2014

Fiat in ritirata dall'auto di massa

Torino punta sui segmenti più dinamici, ma il problema è contenere i costi con volumi bassi

di Andrea Malan

REUTERS

HOME | BUSINESS | MARKETS | WORLD

Fiat's U.S. dealers anxious for broader product lineup

BY BERNIE WOODALL


FIAT

EMEA

FIAT SHOWROOM 2010

- Many cars, blurred family feeling
- Not building a common Brand Equity
- Inconsistent pricing power

FIAT SHOWROOM 2014

- A starting point to redefine the brand

500L (2012)
Volumes 2013: 79K
Ranking: 1° (2013)
Peak: 79K

SEDICI (2006)
Volumes 2013: 6K
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QUBO (2008)
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500 (2007)
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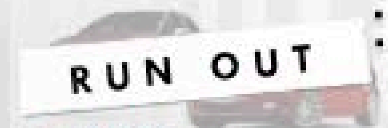
DOBLÒ (2009)
Volumes 2013: 8K
Ranking: 6°(2012)
Peak: 16K



"Cool & Capable"

Small SUV

Compact

Small Car

"All the Cars You Want"

"The Official Car to do What You Want"

"An Icon of Italian Lifestyle"

LCV Derivative

LCV Derivative

Source: Speed, Volumes (EMEA), RK (EU28+EFTA)

FIAT SHOWROOM 2014

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Source: Speed, Volumes (EMEA), RK (EU28+EFTA)

PANDA

IT MAKES A STATEMENT

THE POCKET SIZE SUV

10K€

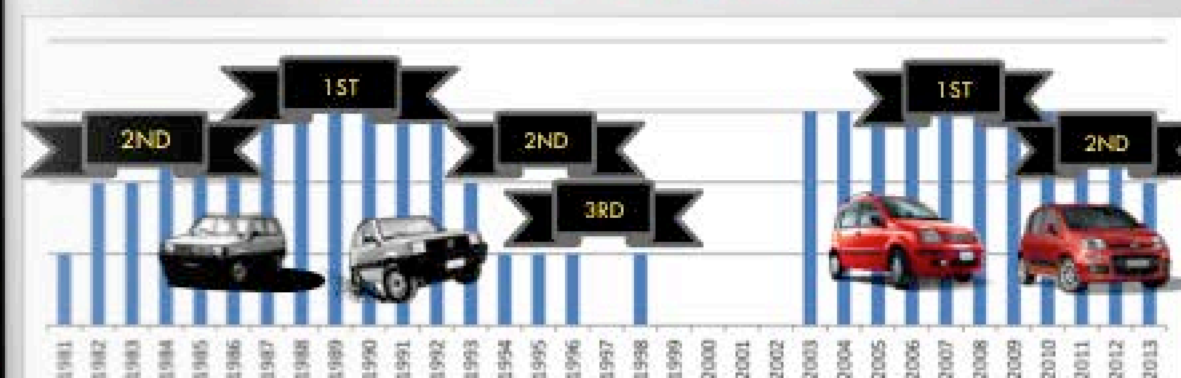
20K€

Average msrp : 16.500€

A BROAD CUSTOMER TARGET

IT HAS BEEN A LEADER SINCE 1980

MORE THAN 6.5 MILLION UNITS SOLD IN 33 YEARS



EMEA

FIAT SHOWROOM 2014

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“Cool & Capable”

RUN OUT

Small SUV

Compact

“The Off

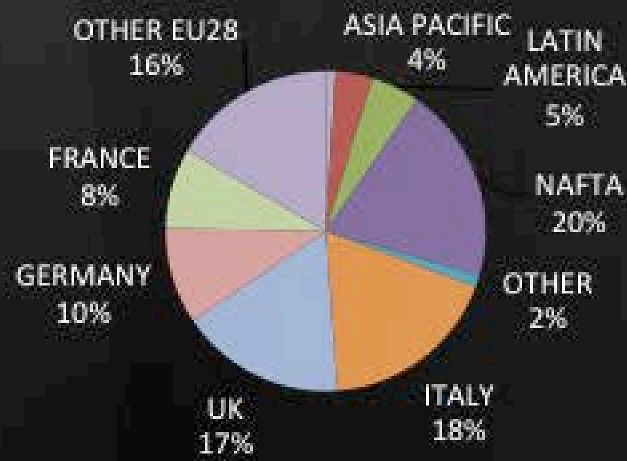
“An Icon of Italian Lifestyle”

LCV Derivative

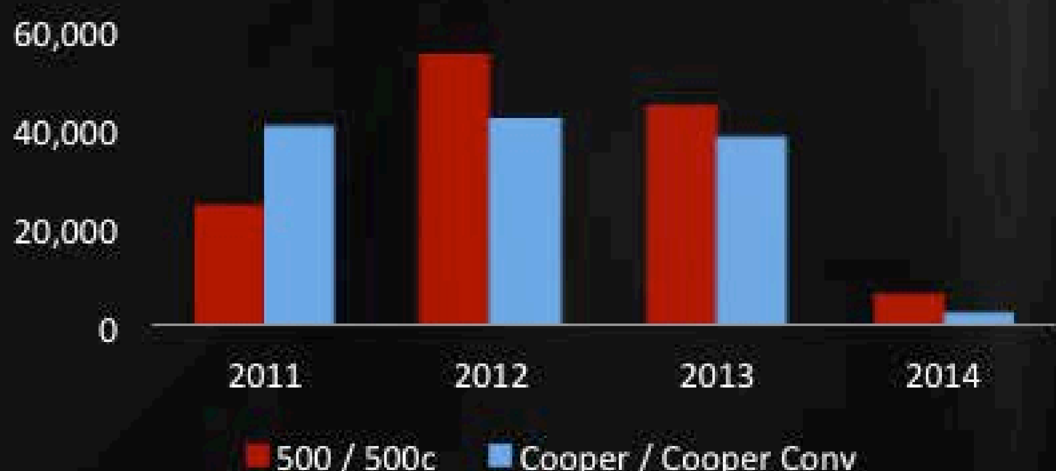
LCV Derivative

Source: Speed, Volumes (EMEA), RK (EU28+EFTA)

WHERE DOES IT SELL?



HOW IS 500 DOING IN NAFTA?



HOW IS 500 DOING IN EU?

FIAT IN NORTH AMERICA:

UNIQUE BLEND OF EMOTION, ASPIRATION, AND DESIRE

- 85% customers are new to Chrysler Group
- Customers buying the brand, not the segment

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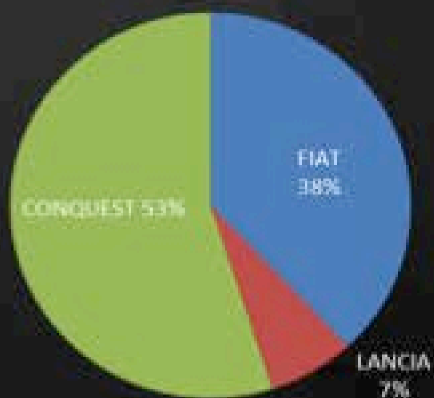
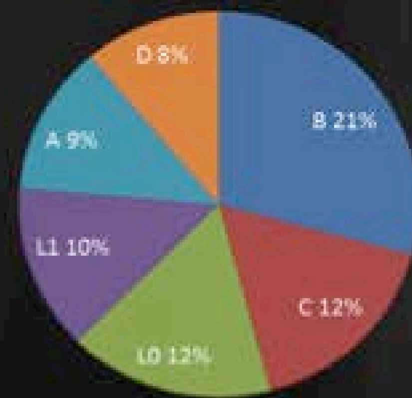
Source: Speed, Volumes (EMEA), RK (EU28+EFTA)

500L CUSTOMER PROFILE

It brings new customers--- --- and adds excitement to a boring segment



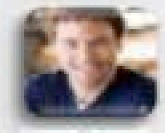
HIGH LEVEL OF CONQUEST



CUSTOMERS COME FROM A BROAD VARIETY OF SEGMENTS

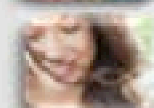
THE 500L 'COOL & CAPABLE'

500L CUSTOMER SEGMENTATION vs L0 SEG.



YOUNGS (17-29) +103%

WITH KIDS <10Y/O +65%



WOMEN +19%

Source: 500L (no Trekking/Living), NCBS FY13 5MM

Q1 2014 RESULTS EU28+EFTA vs 2013

+26,6% SALES VOLUMES

+2,8p.p. MARKET SHARE

2 DIGIT VOLUMES GROWTH IN 13 COUNTRIES

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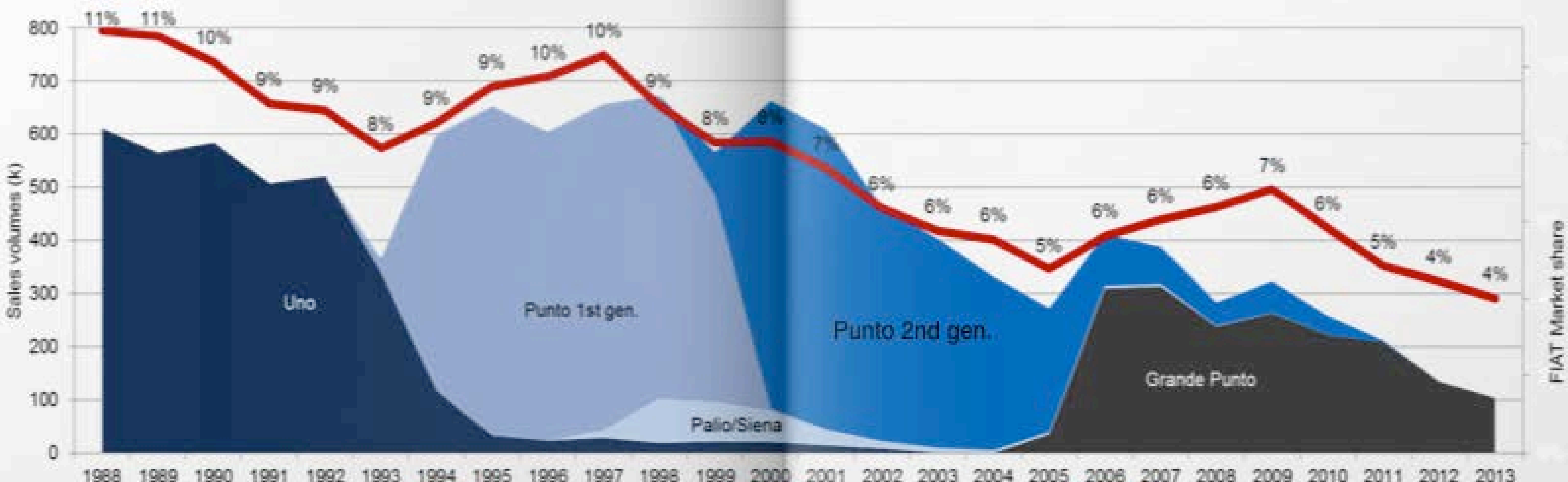
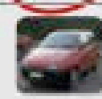
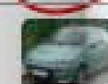
FIAT IS STRONGLY ROOTED IN THE B-SEGMENT



	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
RANKING in B-SEG	1	1	2	4	4	4	1	1	1	1	1	2	2	2	3	4	5	7	3	4	6	5	7	7	9	11

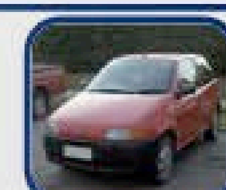




MORE THAN 22M CAR IN 40 YEARS

850
'64 to '71
2,2 Mil Cars sold

127
'71 to '87
5 Mil Cars sold

UNO
'83 to '95
8,8 Mil Cars sold



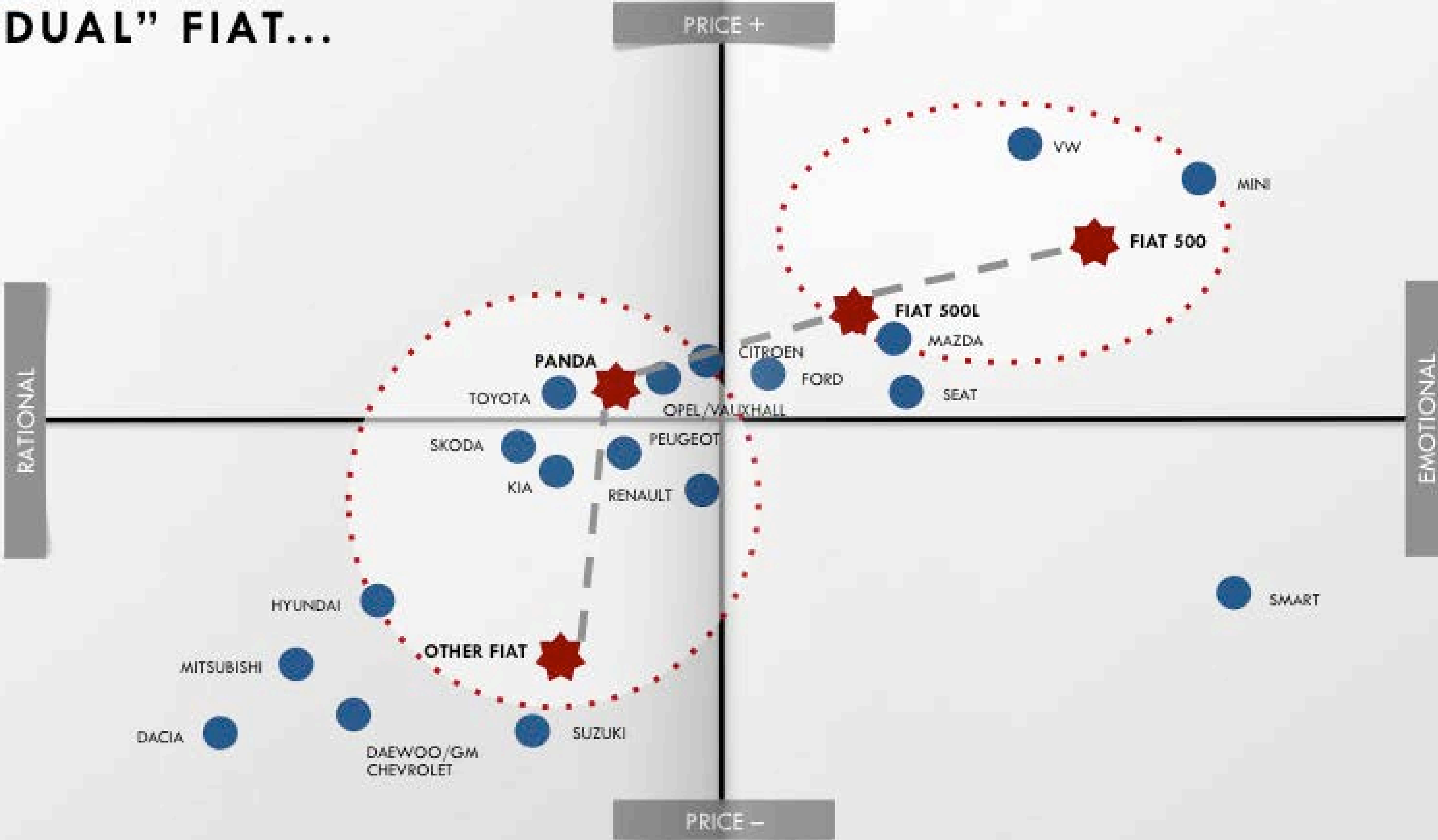
PUNTO
'93 to '99
3,4 Mil Cars sold

PUNTO
'99 to '12
3,1 Mil Cars sold

GRANDE PUNTO
'05 to...
2 Mil Cars sold


DON’T BE MAINSTREAM
HAVE A STORY

A "DUAL" FIAT...



PRICE GAP VS COMPETITION (IN SEGMENTS OF PRESENCE)

NCBS FY 2013 – HATCH – SEGM: A, B, C, LO 5MM (Fiat excl. Abarth, Mini excl. Cooper S)

...FOR A DUAL MARKET

RATIONAL

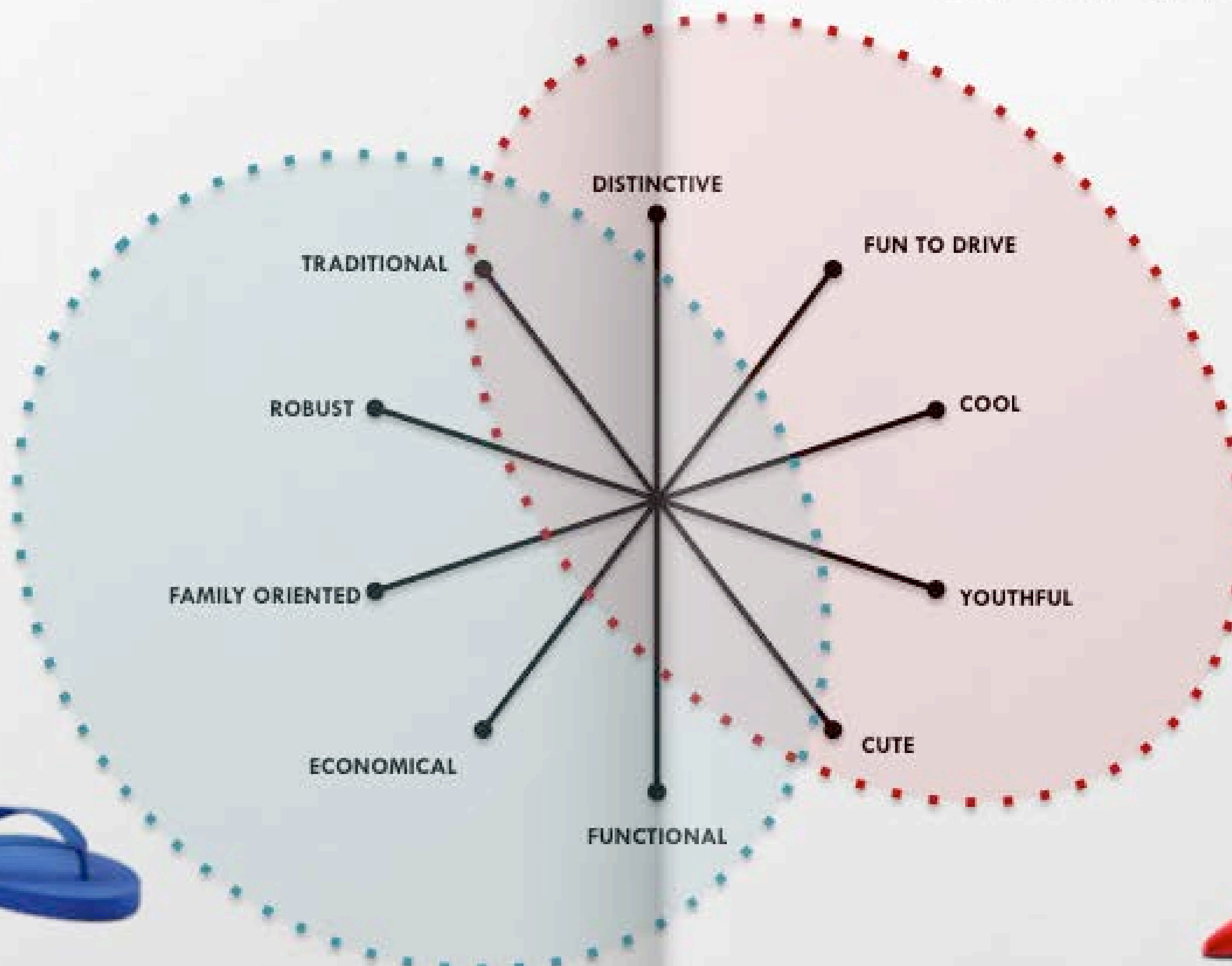
60%

57%

EMOTIONAL

40%

43%



LOWER MAINSTREAM

UPPER MAINSTREAM

FIAT

TWO OF A KIND

SNAPSHOT OF TODAY

TWO MISSIONS

ONE VISION

THE PLAN

FUNCTIONAL OR...

Clarify the way we can tackle the lower end. Feed our dealers and our devoted customer while protecting for a sustainable business.

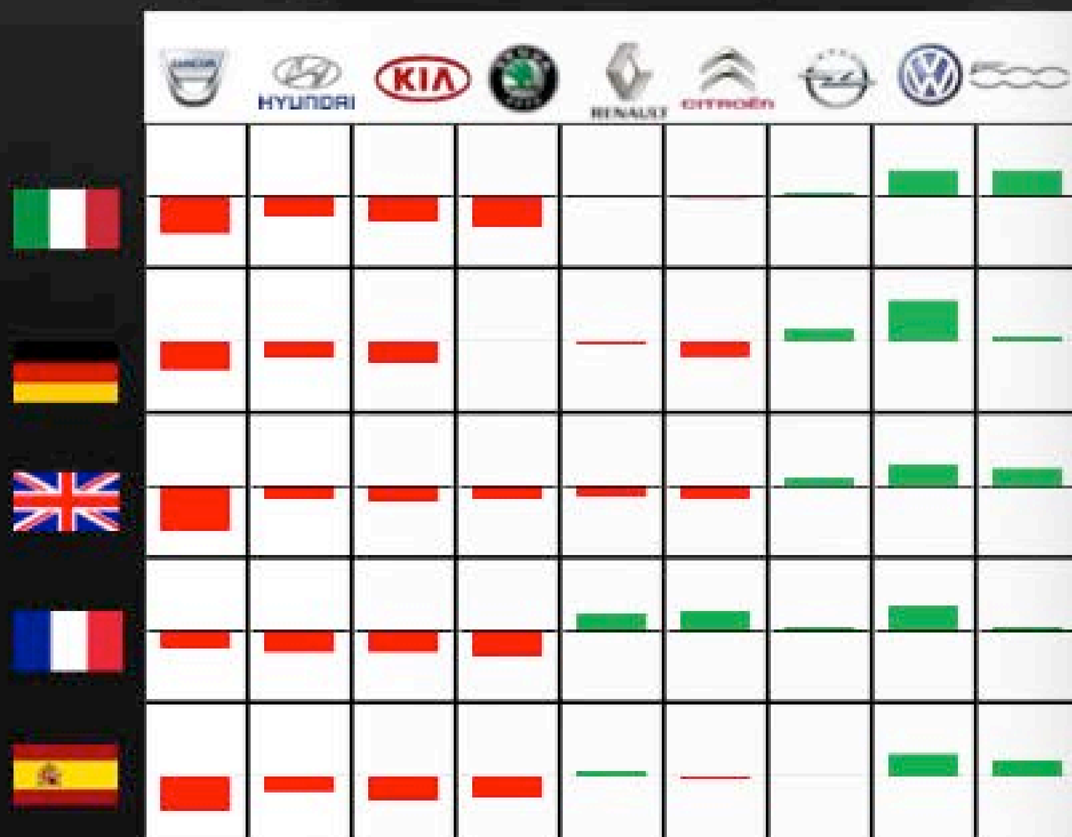
ASPIRATIONAL?

Leverage the 500 family to expand Fiat's position within the upper mainstream markets.

EMEA

UPPER MAINSTREAM

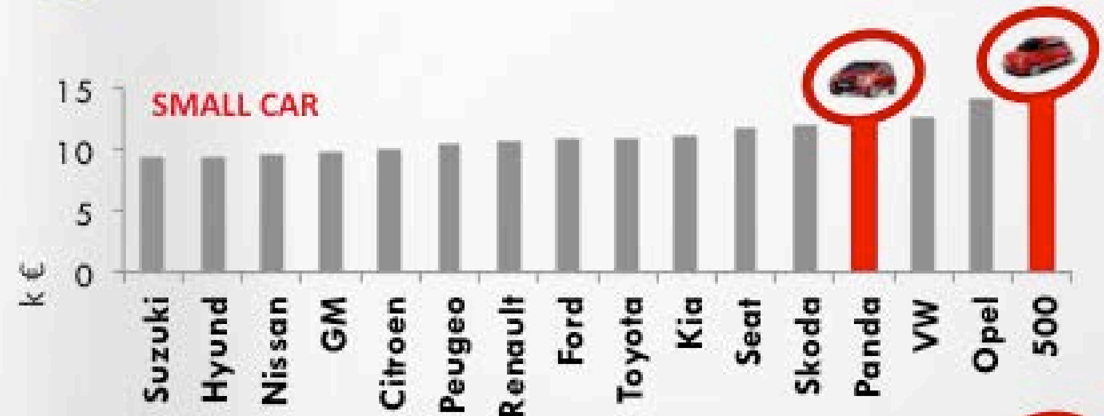
Δ IMAGE VS. MARKET AVERAGE

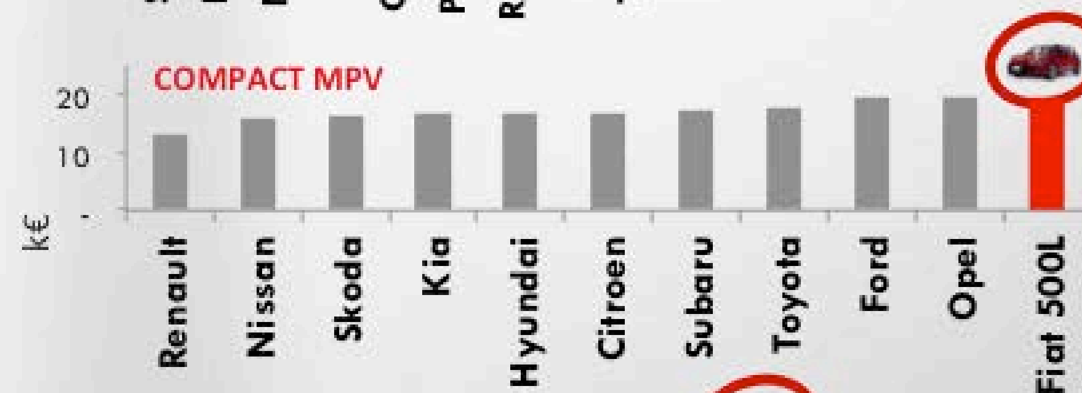


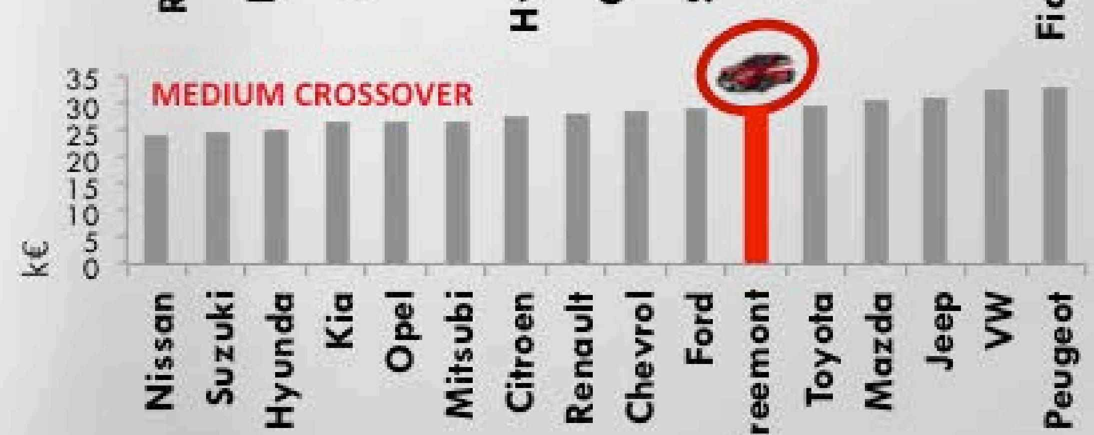
500 COMPETES CREDIBLY WITH THE BEST

Zero equals market average

AVERAGE PRICE PAID

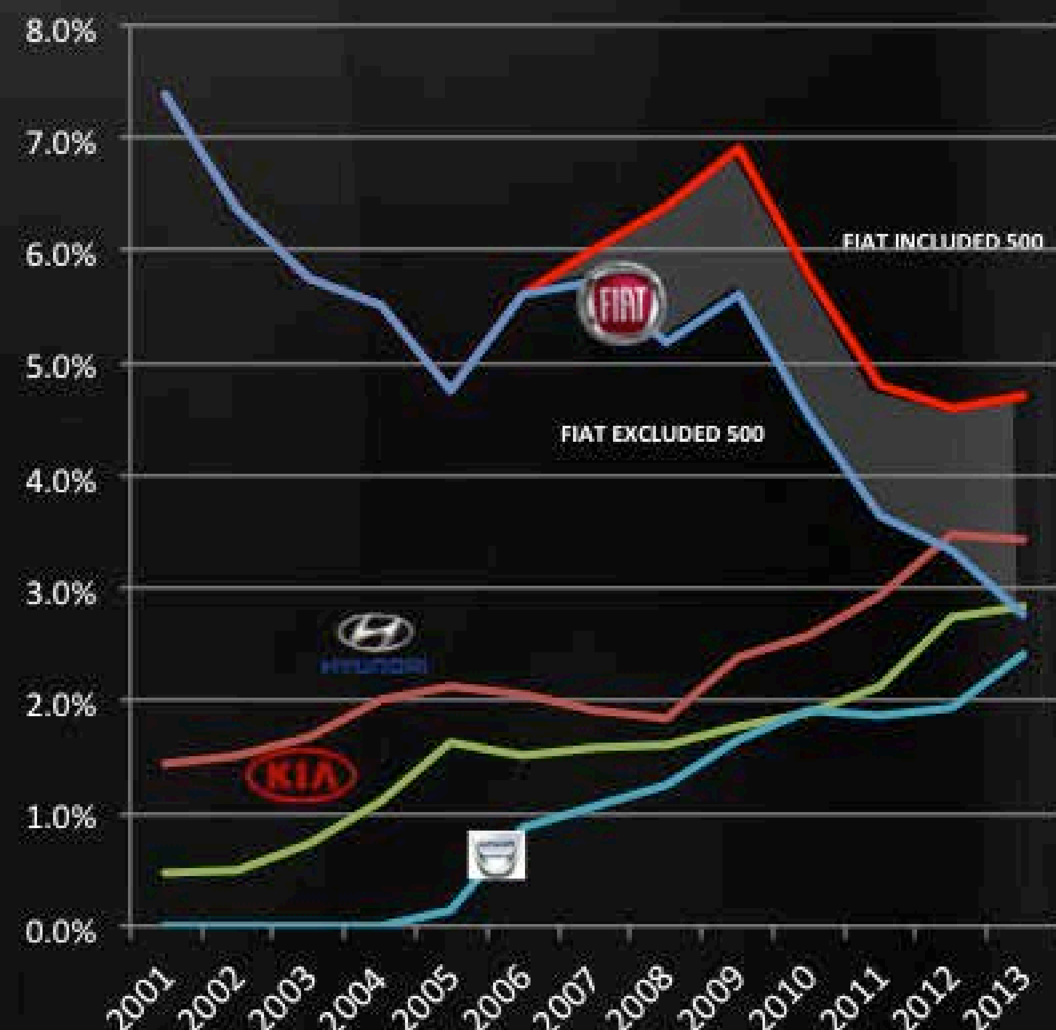






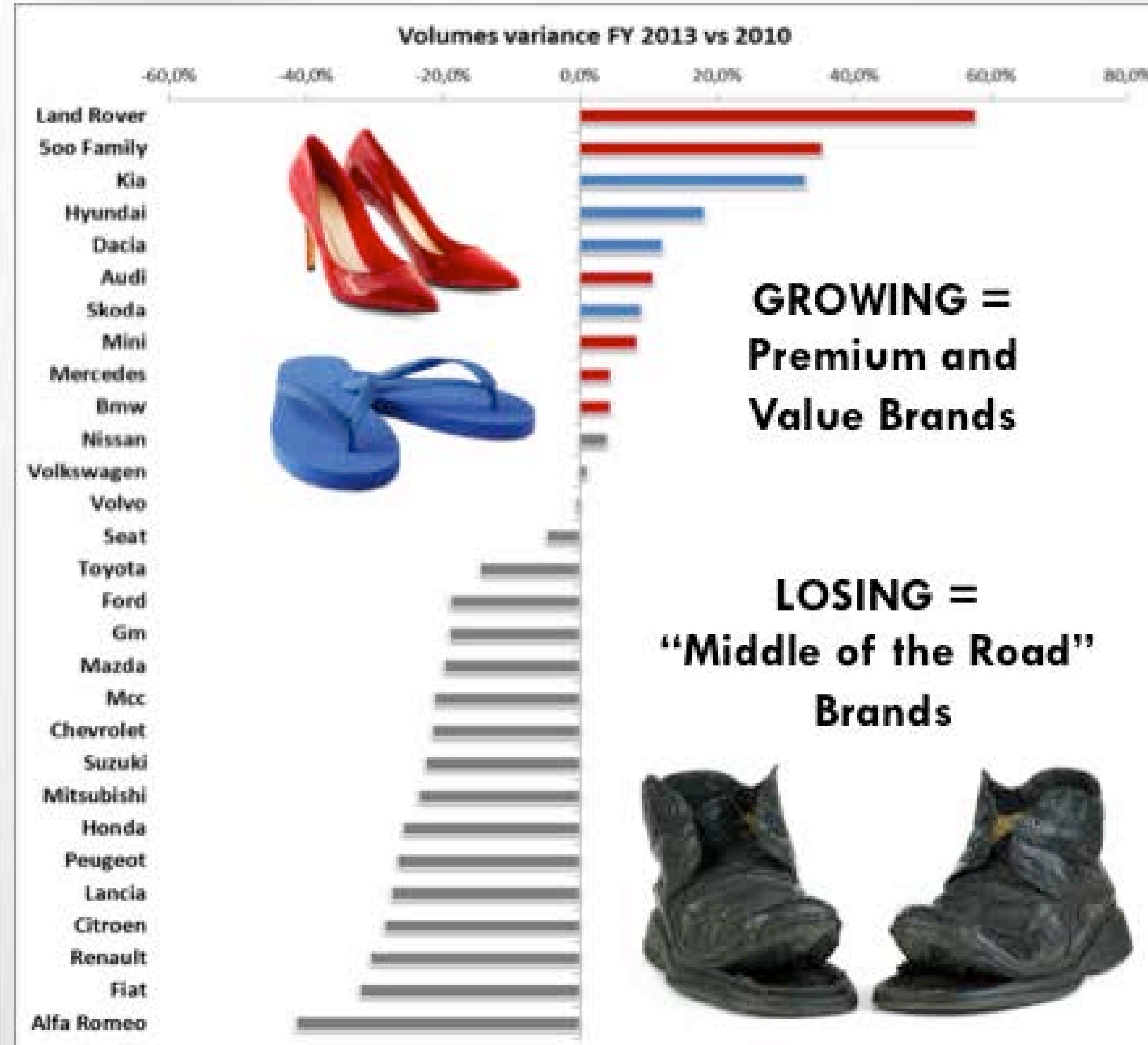
(Source: Car Park Study 2013)

LOWER MAINSTREAM



MS: Eu28+EFTA ACEA

WE NEED TO TAKE A STAND



FIAT

TWO OF A KIND


FUNCTIONAL
FIAT
ASPIRATIONAL

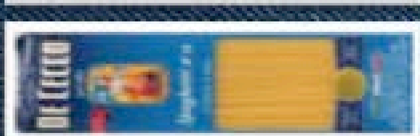
CONSUMER GOODS

MAINSTREAM

Shell

ANN TAYLOR LOFT

LAVENDER LABEL

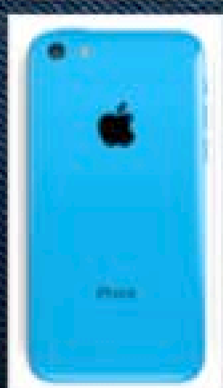


MAX&Co.

HYATT HOTELS & RESORTS

COURTYARD Marriott

EMPORIO ARMANI



BURBERRY BRIT

DENIM & SUPPLY RALPH LAUREN

UPPER MAINSTREAM

VERA WANG

ANN TAYLOR

Shell V-Power

MaxMara

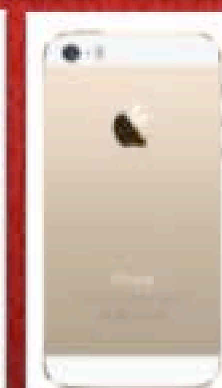
PARK HYATT

Marriott HOTELS & RESORTS

GIORGIO ARMANI

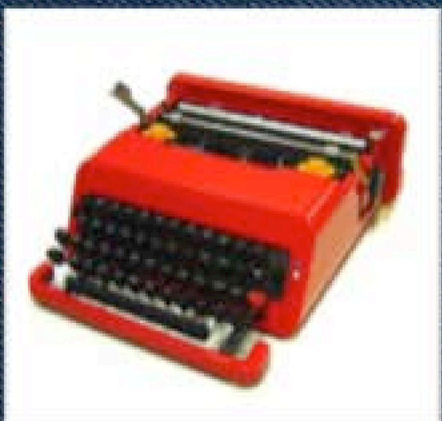
BURBERRY LONDON

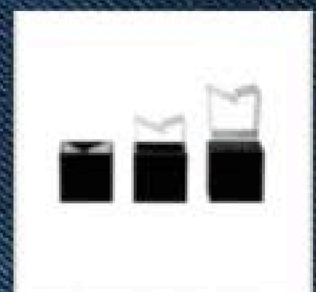
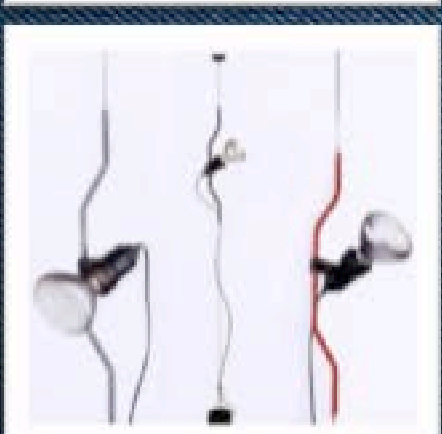
RALPH LAUREN



ITALIAN DESIGN

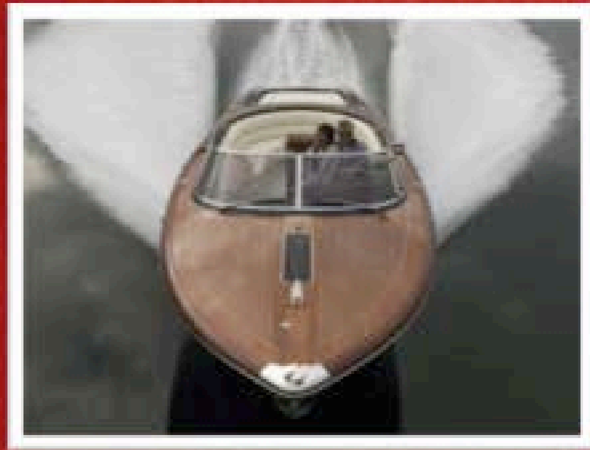
MAINSTREAM



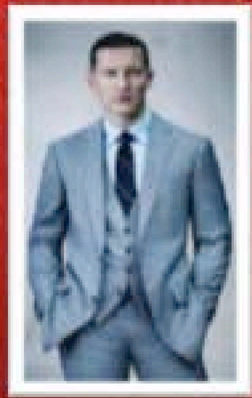
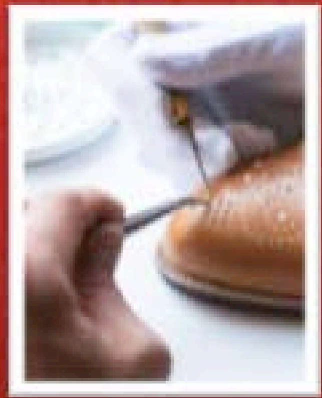





UPPER MAINSTREAM



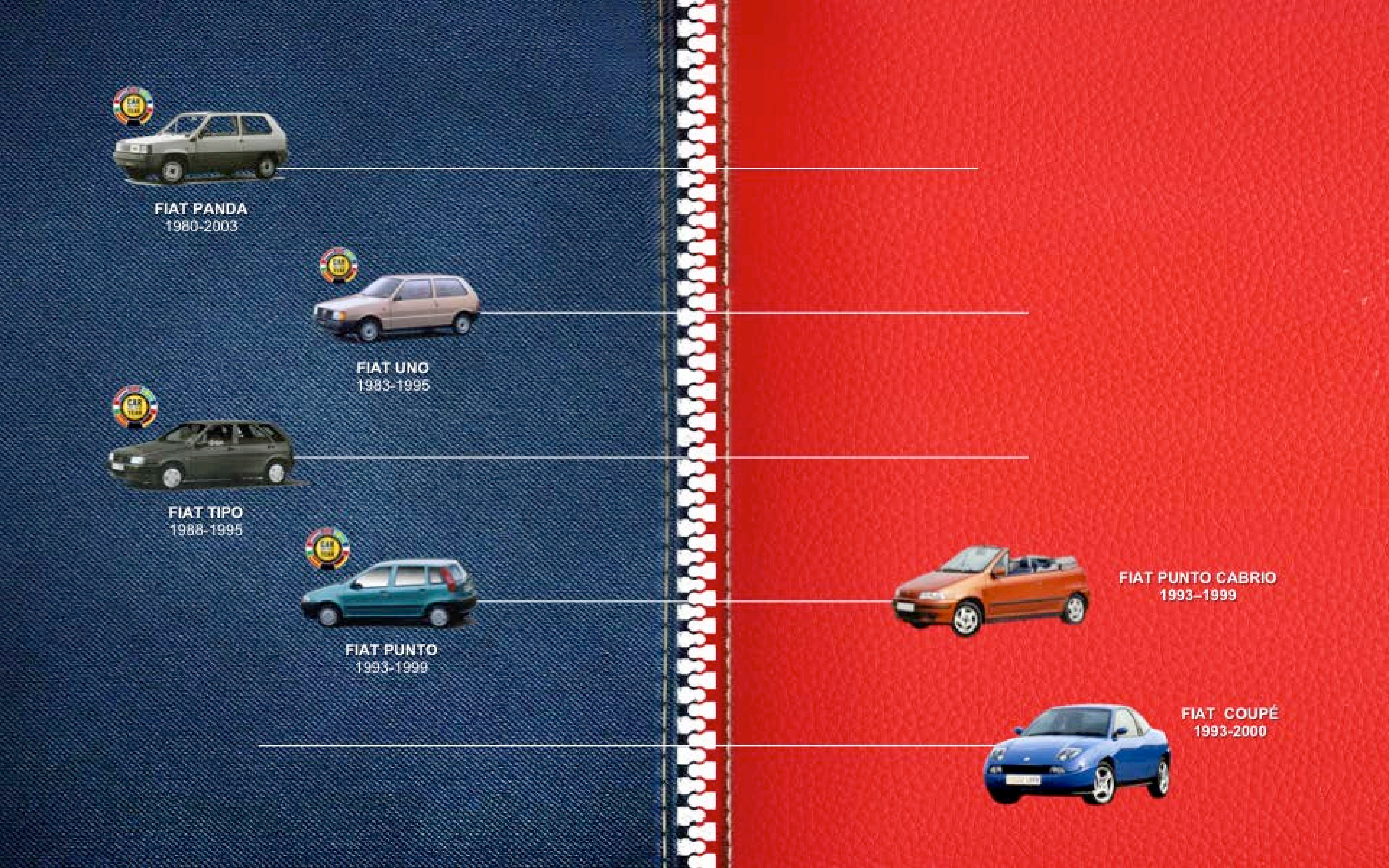


FIAT 124
«Berlina»
1966

FIAT 124 SPORT
«Spider & Coupé»
1966


FIAT 600
1955-1969
FIAT 600 Multipla
1956-1966
FIAT 500
«Nuova 500»
1957-1975
FIAT 124
«Berlina»
1966-1974
FIAT 128
1969-1983
FIAT 127
1971-1987
FIAT 500
«Topolino»
1936-1955
FIAT 8V
1952-1954
FIAT 124 Sport
«Spider & Coupé»
1966-1972
FIAT DINO
«Spider & Coupé»
1966-1972
FIAT 130 COUPÉ
1966-1977
FIAT X 1/9
1972-1989



FIAT PANDA
1980-2003
FIAT UNO
1983-1995
FIAT TIPO
1988-1995
FIAT PUNTO
1993-1999
FIAT PUNTO CABRIO
1993–1999
FIAT COUPÉ
1993-2000

FIAT BRAVO & BRAVA
1995-2001
FIAT PUNTO
1999-2010
FIAT PANDA
«Nuova Panda»
2003-2012
FIAT GRANDE PUNTO
2005-201...
FIAT 500
2007-201...
FIAT PANDA
2011-201...
FIAT 500L
2012-201...

LET'S AVOID MISUNDERSTANDING

NOT A LOW COST BRAND

IKEA

SMART AFFORDABLE SOLUTIONS

NOT A PREMIUM BRAND

Kartell

A LITTLE EXTRA PRICE TO FEEL SPECIAL
THE COOL ITALIAN BRAND

FIAT

TWO OF A KIND

BRAZIL

TODAY


OLD PALIO
UNO
PALIO
PUNTO
SIENA
GRAND SIENA
LINEA


"FIAT DEFINING AUTOMOTIVE LANDSCAPE"


"LEADER FOR 12 YEARS"

FUTURE

A-SEGMENT

UNO

PALIO/PUNTO

GRAND SIENA

STRADA

SMALL CUV

COMPACT PICKUP

FUTURE

A-SEGMENT

UNO

PALIO/PUNTO

GRAND SIENA

STRADA

SMALL CUV

COMPACT PICKUP

“HAPPINESS COMES WITH MOBILITY”

FUTURE

A-SEGMENT

UNO

PALIO/PUNTO

GRAND SIENA

STRADA

SMALL CUV

COMPACT PICKUP

FUTURE


A-SEGMENT
UNO
PALIO/PUNTO
GRAND SIENA
STRADA
SMALL CUV
COMPACT PICKUP


BLUE JEAN
TUXEDO

FIAT GLOBAL LRP

	2014	2015	2016	2017	2018
LATAM	NEW UNO FL	A-SEGMENT COMPACT PICKUP	NEW PUNTO B-CUV NEW GRAND SIENA	NEW PALIO	NEW SIENA

CHINA


GAC FIAT
2014年3月7日 正式上市
时尚版 108,800元
舒适版 121,800元
时尚版 122,800元
豪华版 159,800元
JOINT VENTURE SINCE 2009

IT'S TOUGH TO MAKE

PREDICTIONS,

ESPECIALLY

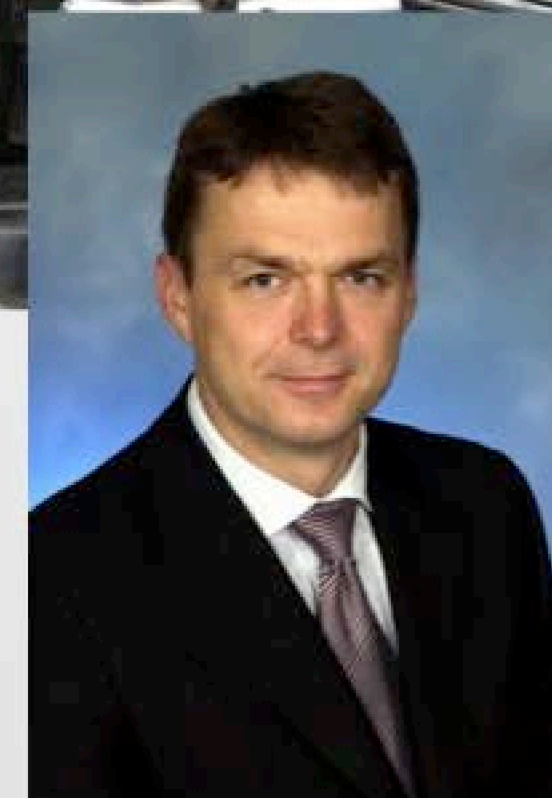
ABOUT THE

FUTURE

• YOGI BERRA •

这很难
作出预测
尤其是关于未来

INDIA



"IT'S AMAZING; THERE ARE BLOODY THOUSANDS OF THEM."

— MIKE MANLEY

LAST WEDNESDAY, 9:13PM

CONNECTING WITH INDIA SINCE 1950s

FIAT 1100: 1950'S

FIAT PREMIERE 118NE: 1980'S

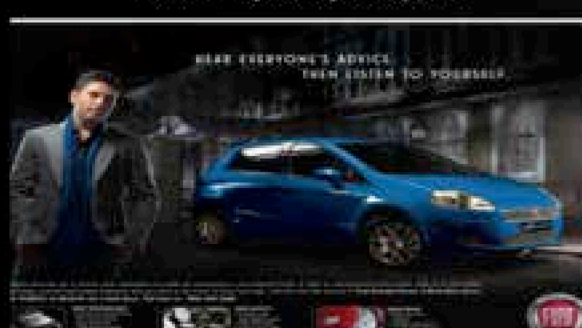
FIAT UNO: 1990'S

FIAT SIENA: 2000

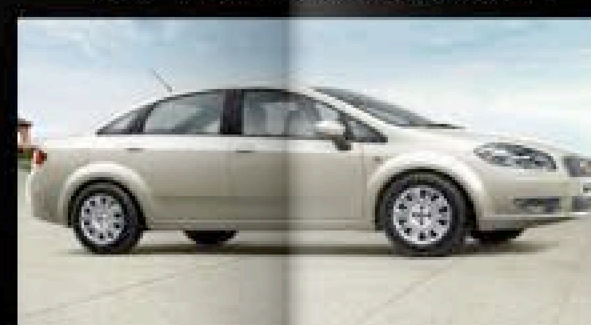
FIAT PALIO: 2001

FIAT PETRA: 2004

FIAT PUNTO: 2011



FIAT LINEA CLASSIC: 2013



FIAT LINEA: 2009 & NEW LINEA: 2014

ALL MODELS ARE LOCALLY PRODUCED.

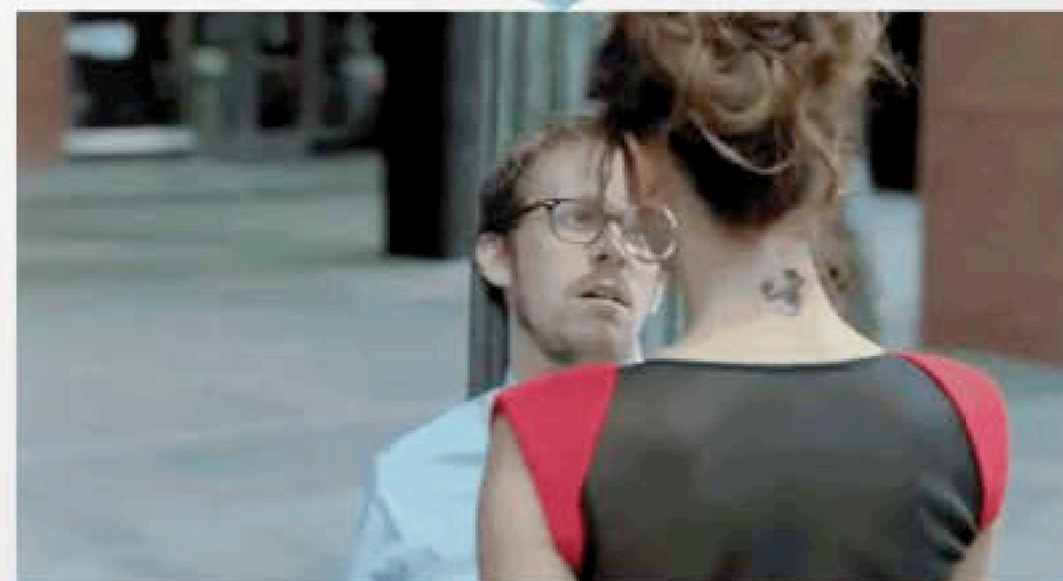
FIAT GLOBAL LRP

	2014	2015	2016	2017	2018
LATAM	NEW UNO FL	A-SEGMENT COMPACT PICKUP	NEW PUNTO B-CUV NEW GRAND SIENA	NEW PALIO	NEW SIENA
APAC	AVVENTURA LINEA OTTIMO PUNTO	OTTIMO CROSS	D SEDAN NEW AVVENTURA	NEW PUNTO NEW GRAND SIENA	COMPACT CUV

NAFTA

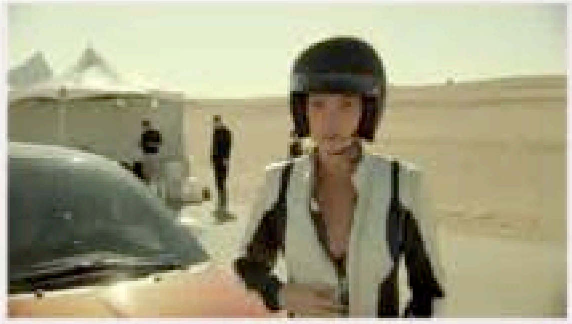
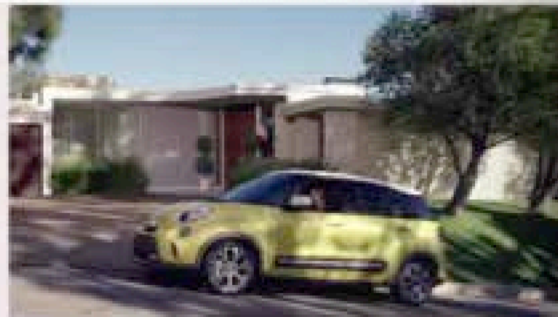
SEDUCTION

ASPIRATION

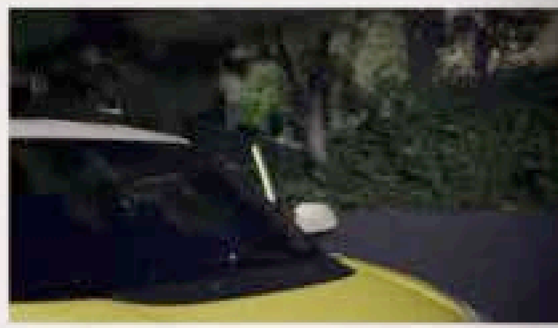
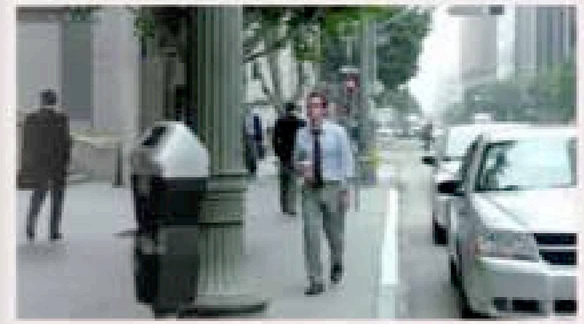
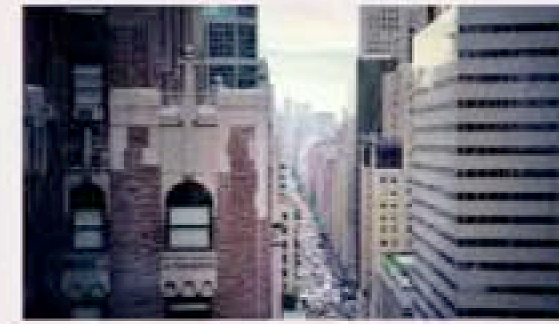
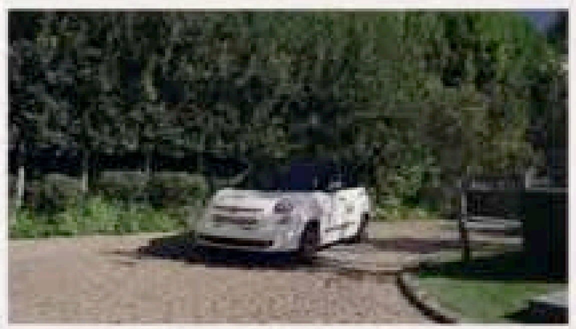
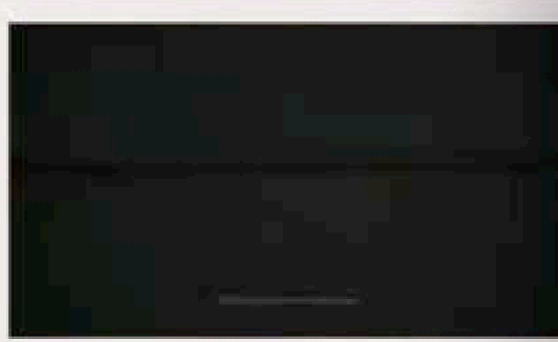
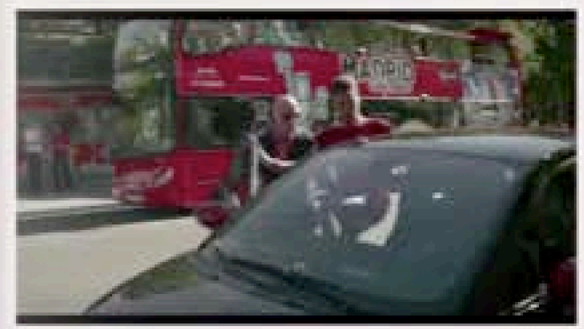


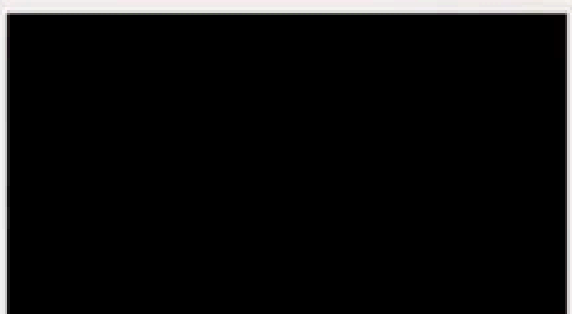
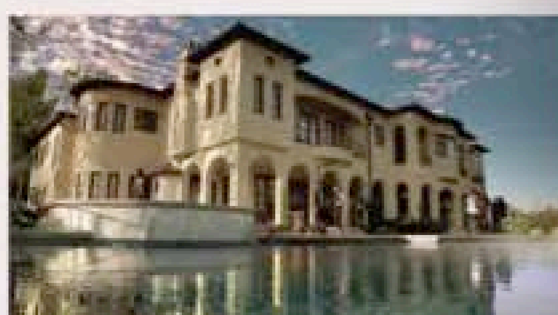
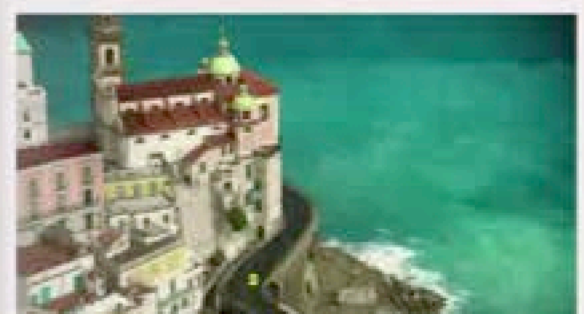
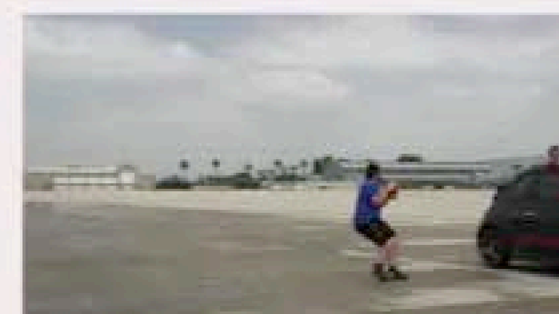
BRAND POWER

PRICING POWER



TODAY

500

500L

FUTURE

500

500L

500X

SPECIALTY

TODAY

500

500L

FUTURE

500

500L

500X

SPECIALTY

TODAY

500

500L

FUTURE

500

500L

500X

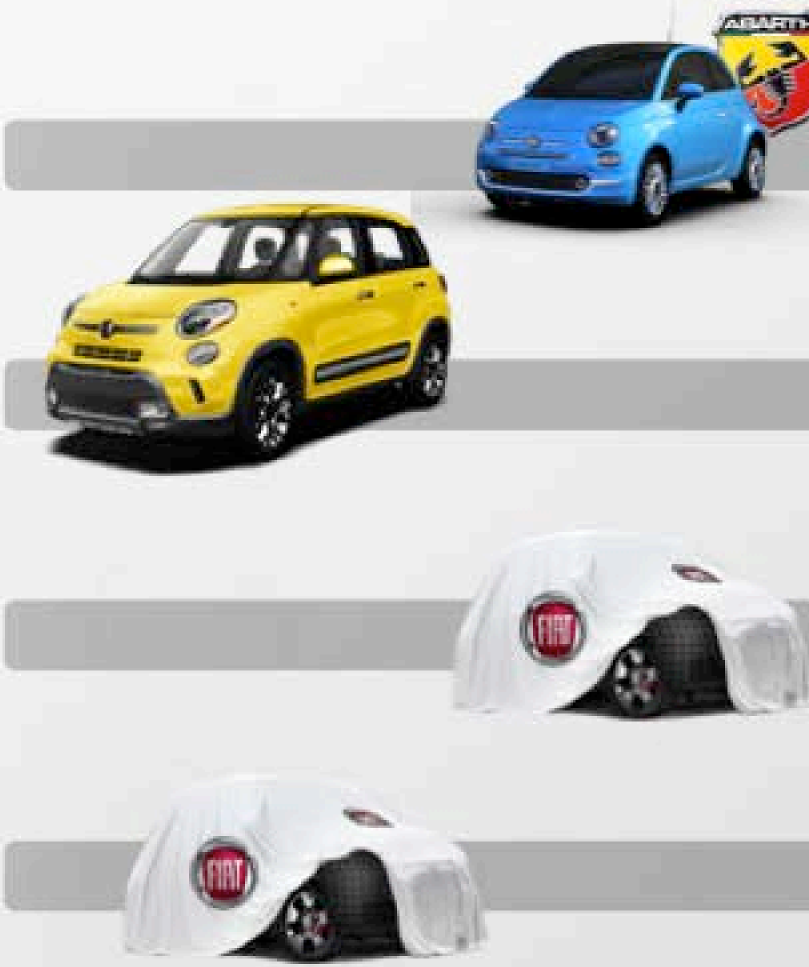
SPECIALTY

TODAY

500

500L

FUTURE



500

500L

500X

SPECIALTY

TODAY

500

500L

FUTURE

500

500L

500X

SPECIALTY

TODAY

500

500L

FUTURE

500

500L

500X

SPECIALTY

RATIONAL

OPPORTUNITY

HISTORY

ASPIRATIONAL

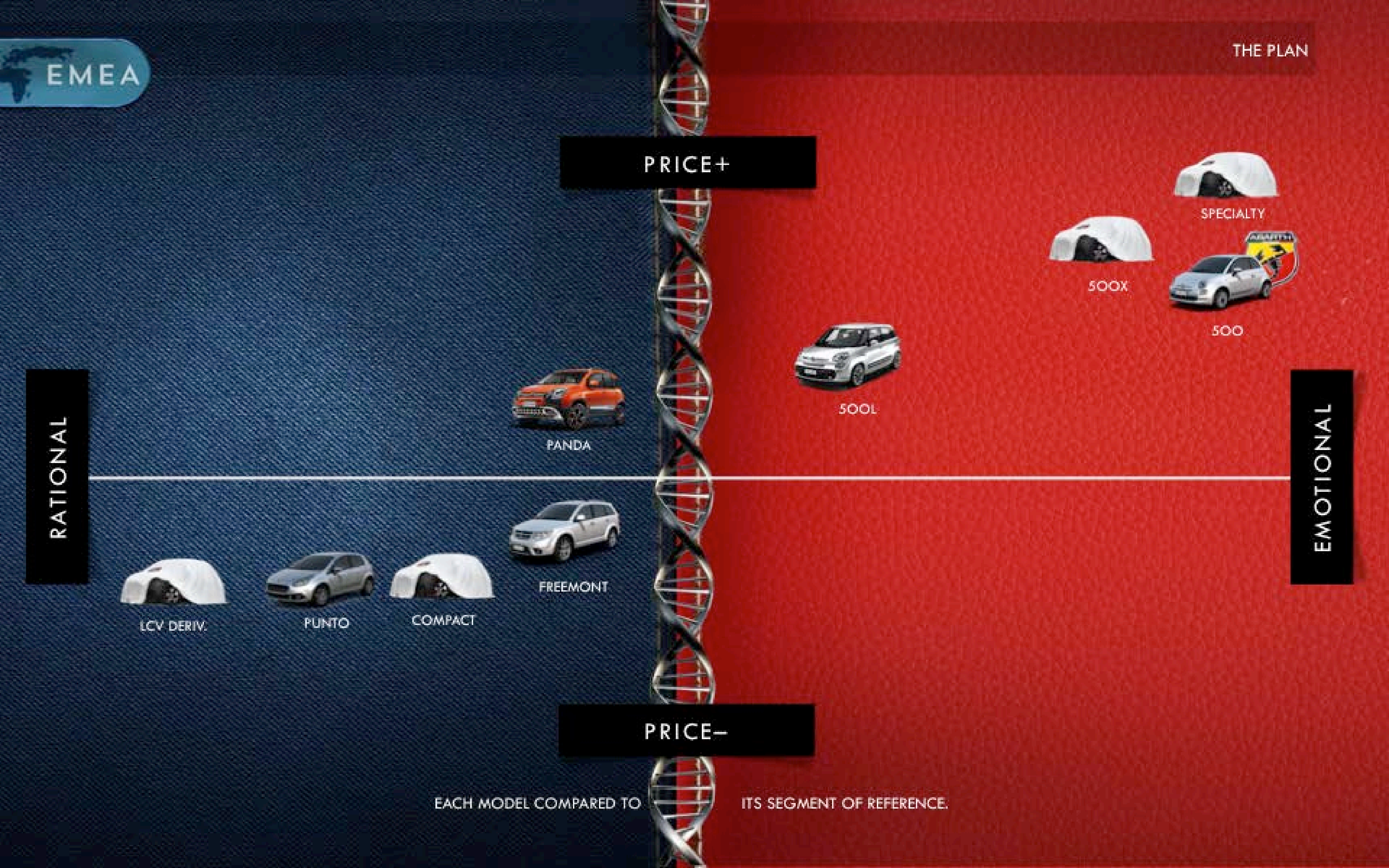
CHALLENGE

CHANGE

EUROPE

CLARIFY
THE OBJECTIVE

PURIFY
THE DNA

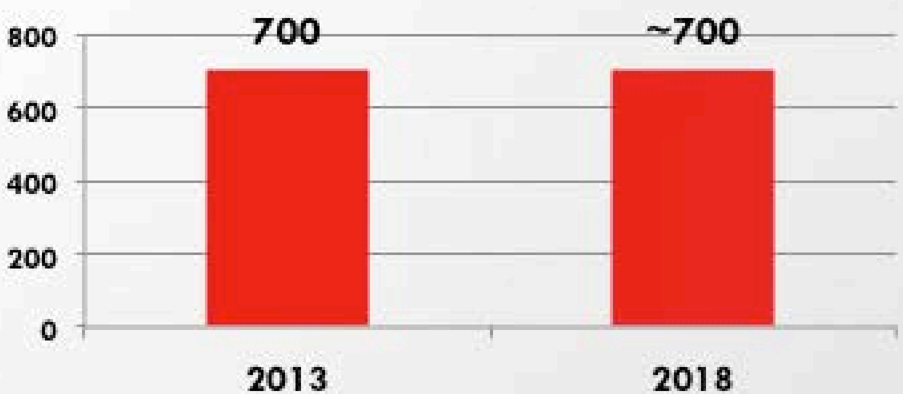

EMEA
PRICE+
SPECIALTY
500X
500
500L
PANDA
RATIONAL
EMOTIONAL
FREEMONT
LCV DERIV.
PUNTO
COMPACT
PRICE–
EACH MODEL COMPARED TO ITS SEGMENT OF REFERENCE.

FIAT GLOBAL LRP

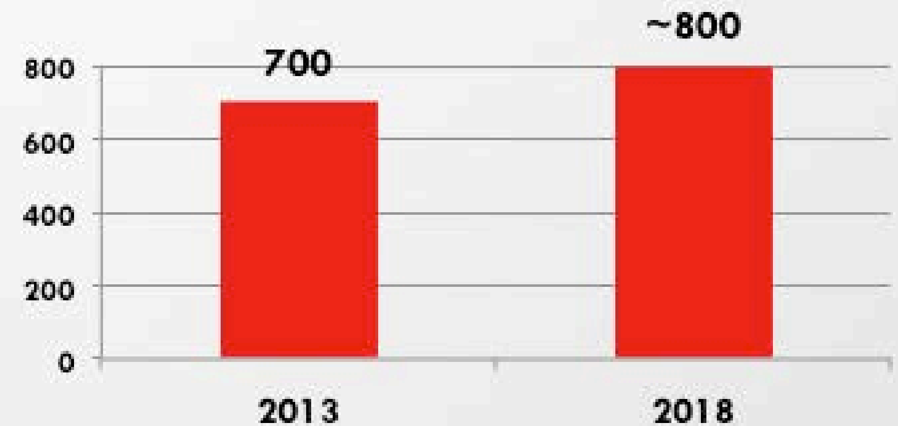
	2014	2015	2016	2017	2018
LATAM	NEW UNO FL	A-SEGMENT COMPACT PICKUP	NEW PUNTO B-CUV NEW GRAND SIENA	NEW PALIO	NEW SIENA
APAC	AVVENTURA OTTIMO PUNTO	OTTIMO CROSS	D SEDAN NEW AVVENTURA	NEW PUNTO NEW GRAND SIENA	COMPACT CUV
NAFTA		500X SPECIALTY			
EMEA	500X	COMPACT SEDAN SPECIALTY	COMPACT HATCH COMPACT SW B SEGMENT	COMPACT CUV	NEW PANDA

VOLUMES & MIX

EMEA



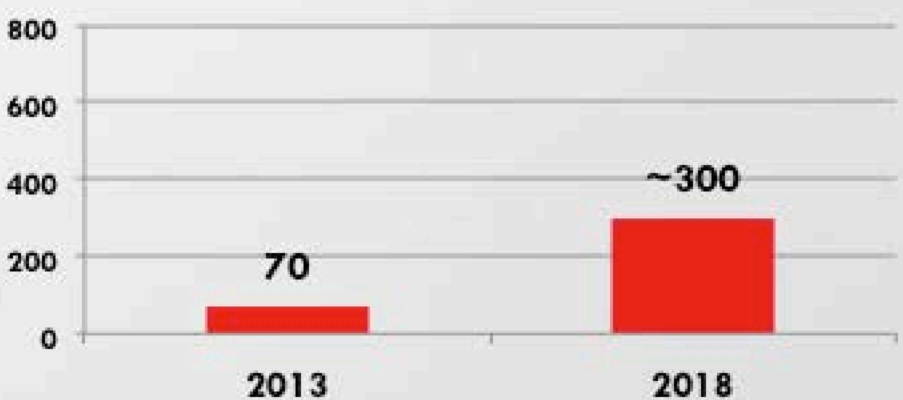
LATAM



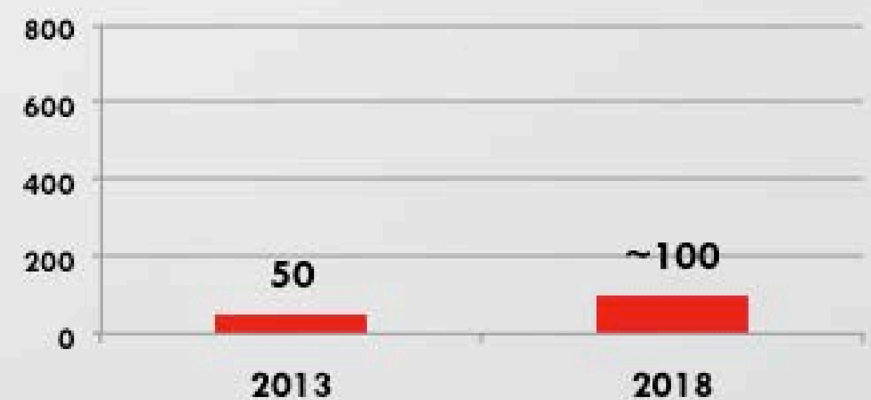
GLOBAL

2013 **1.5M** → 2018 **1.9M**

APAC



NAFTA



THE DEPLOYMENT

PRODUCT

MARKETING

SALES

PRODUCT

= aligned with competition

++	**SPACE EFFICIENCY** (roominess, trunk capability)	=
=	**STYLE**	++
–	**TECHNOLOGY**	+
+	**ECONOMY** (fuel efficiency and TCO)	=
=	**SAFETY**	=

MARKETING

OFFERING

«One Size Fits All» (1 trim, 2 engines, 4 colours)	«Tailor-Made» (3 trims, 4 engines, 12 colours)

PRICING

Competitive net price, no bargaining	Content & design focused

COMMUNICATION

Price and product benefits	Attitude and mindset

SALES PROCESS

SUPPLY CHAIN

Build to stock	Build to order

DISTRIBUTION

Primary Network Secondary Network A pilot for online sales	Only Primary Network

SALES CHANNEL

Fleet opportunities	Focus on private channel

SALES METHODS

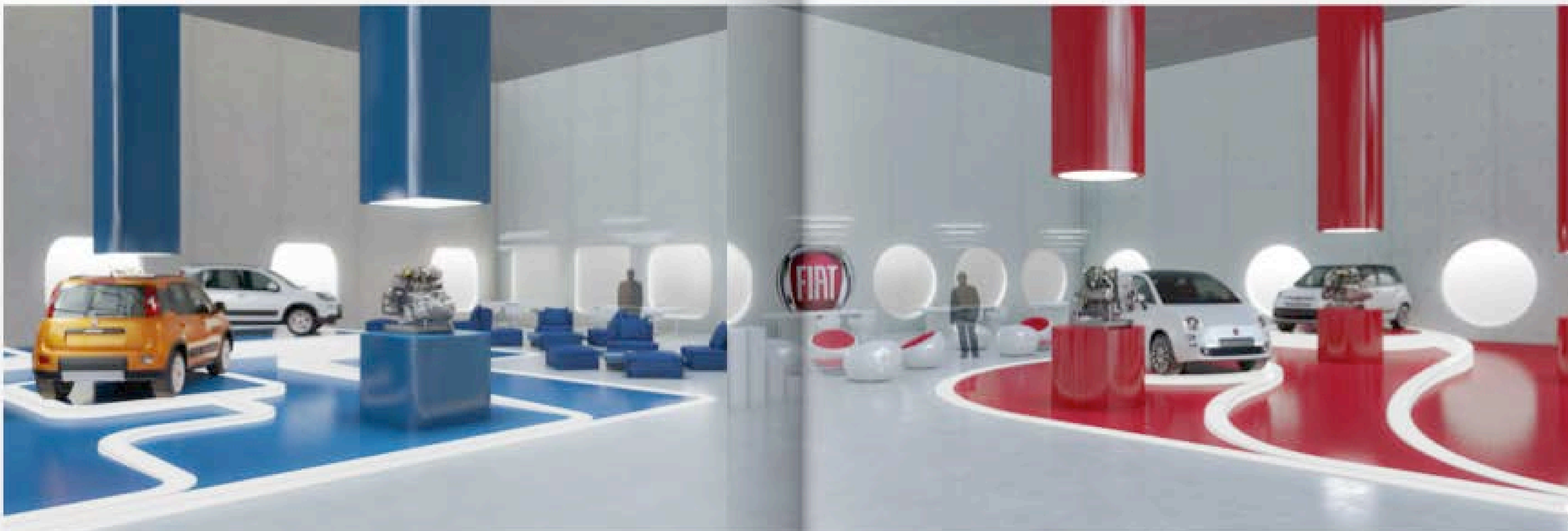
Product walk-around also focused on key functional features and benefits	Product walk-around also focused on design and customization

DEALER REMUNERATION

Based on volumes	Based on quality standards

NETWORK SHOWROOM

NETWORK SHOWROOM



NETWORK SHOWROOM

ONE BRAND

ASPIRATIONAL

FUNCTIONAL

TWO SOULS

WE	ME
INCLUSIVE	EXCLUSIVE
STATUS SIMPLE	STATUS SYMBOL
THE CAR YOU NEED	THE CAR YOU WANT
LOGIC	MAGIC

LOGIC
MAGIC

LOGIC

WILL GET YOU

FROM

A TO Z

THE

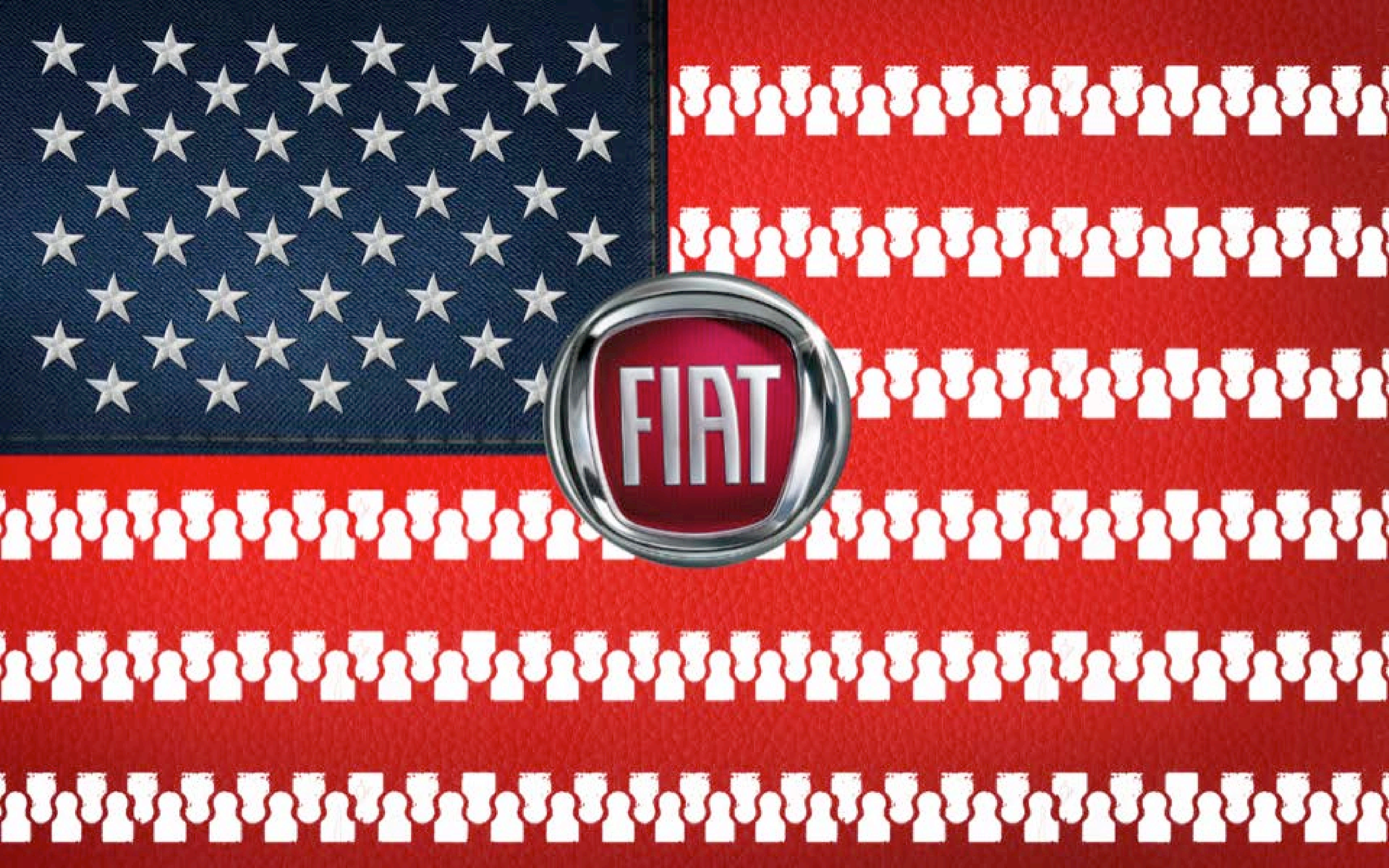
MAGIC

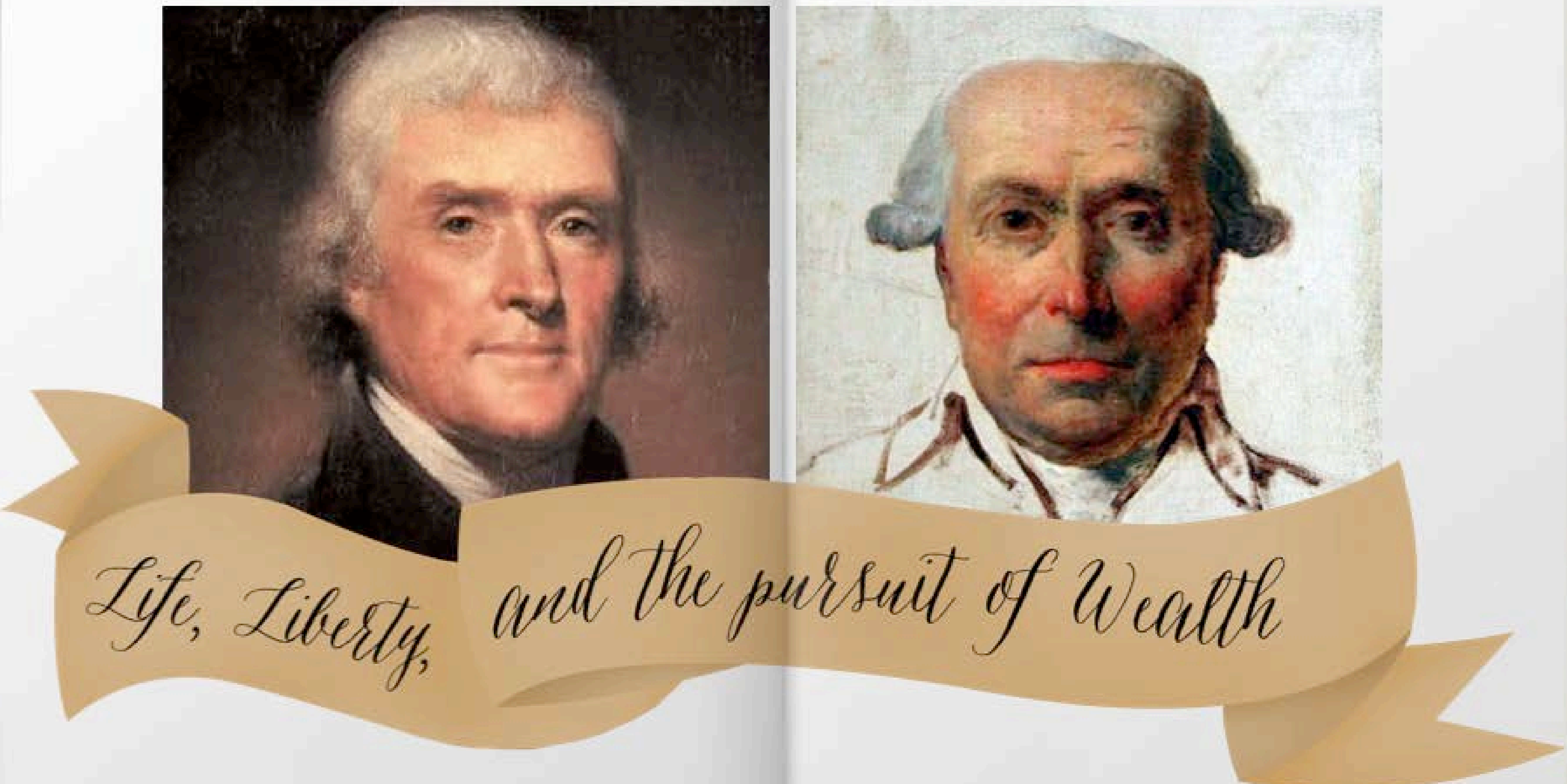
OF IMAGINATION

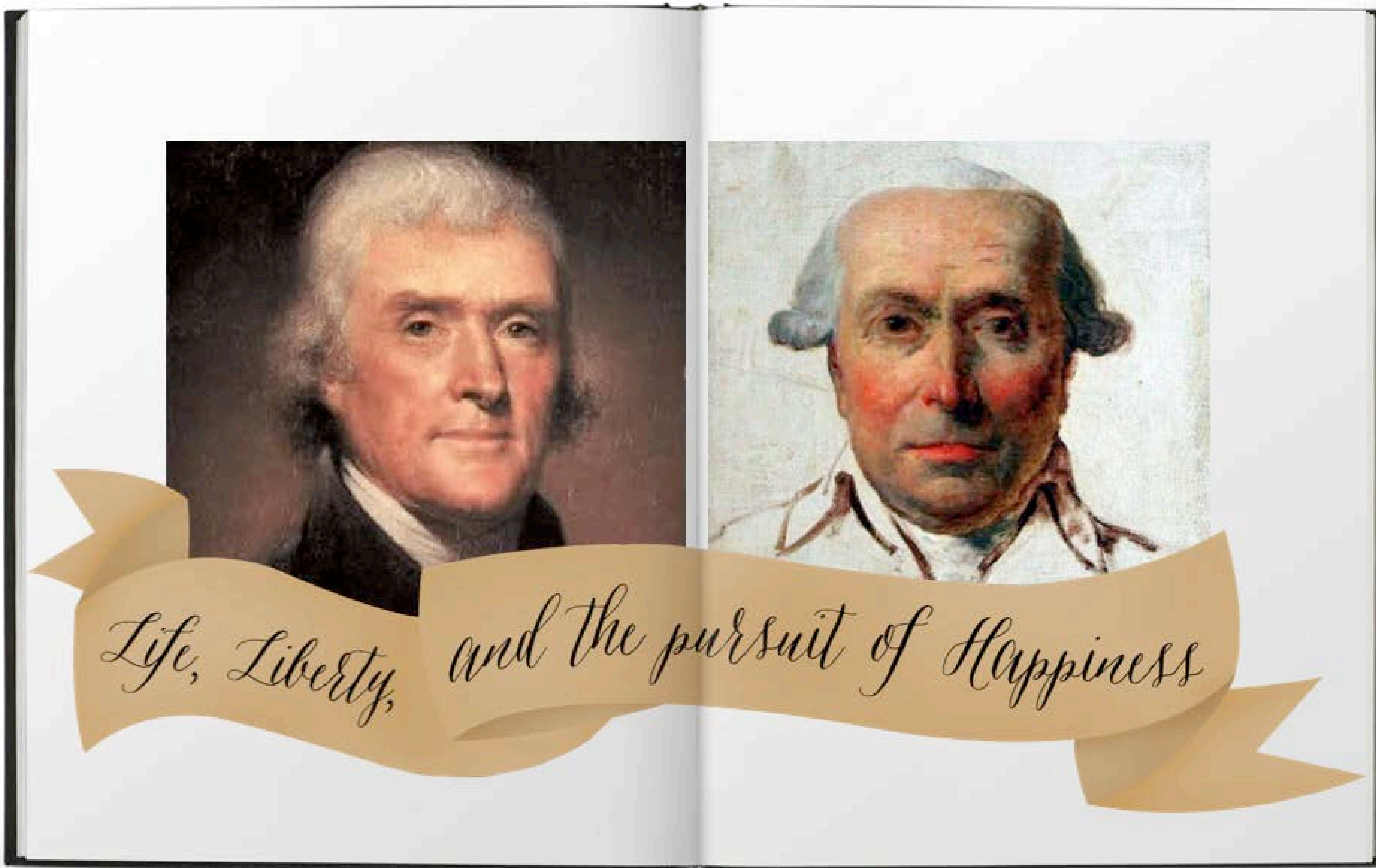
• WILL TAKE YOU •

EVERYWHERE ELSE

• ALBERT EINSTEIN •


FIAT


Life, Liberty, and the pursuit of Wealth


Life, Liberty, and the pursuit of Happiness


ET 817XP

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