

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











OUR FIAT STORY

The logo for Fiat Chrysler Automobiles (FCA) is centered on the cover. It consists of a red 'F' followed by a blue 'C' and a blue 'A'. The 'F' is a simple, blocky letter. The 'C' is a circle with a gap on the right side. The 'A' is a simple, blocky letter with a triangular top.

FIAT CHRYSLER AUTOMOBILES

**FCA**

FIAT CHRYSLER AUTOMOBILES



OUR FIAT STORY









**“A DISSOCIATIVE IDENTITY DISORDER?”**

**D.I.D.**



**RATIONAL  
FUNCTIONAL**



**EMOTIONAL  
ASPIRATIONAL**





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

SPRING 15, 2013 3:40 p.m. ET

THE WALL STREET JOURNAL. | BUSINESS

AUTOS - INDUSTRY

## Fiat Delays Launch of Two Models

By GILLES CASTONGUAY

Jan 1, 2013 8:17 a.m. ET

CORRIERE DELLA SERA  
Economia

IL FUTURO DELLA FIAT

14 settembre 2013 | 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&amp;Mondo Norme e Tributi Finanza&amp;Mercati Nov

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

EDITOR

HOME BUSINESS MARKETS WORLD PO

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

By BERNIE WOODALL

DETROIT 14 May 15, 2013 5:19am EDT



# 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

## PUNTO (2005)

*\*Restyling in 2009 & 2011 TBC*  
 Volumes 2013: 118K  
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## FREEMONT (2011)

Volumes 2013: 20K  
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## 500 (2007)

Volumes 2013: 165K  
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*"Cool & Capable"*

Small Car

*"All the Cars You Want"*

*"The Official Car to do What You Want"*

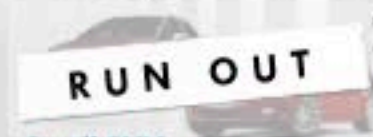
*"An Icon of Italian Lifestyle"*

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Small SUV

Compact

## QUBO (2008)

Volumes 2013: 13K  
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 Peak: 24K

## DOBLÒ (2009)

Volumes 2013: 8K  
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LCV  
 Derivative



LCV  
 Derivative

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Compact



"An Icon of Italian Lifestyle"



"All th



"The Official Car to do What You Want"



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 Derivative



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# PANDA

SNAPSHOT OF TODAY

## IT MAKES A STATEMENT



## THE POCKET SIZE SUV



10K€

20K€



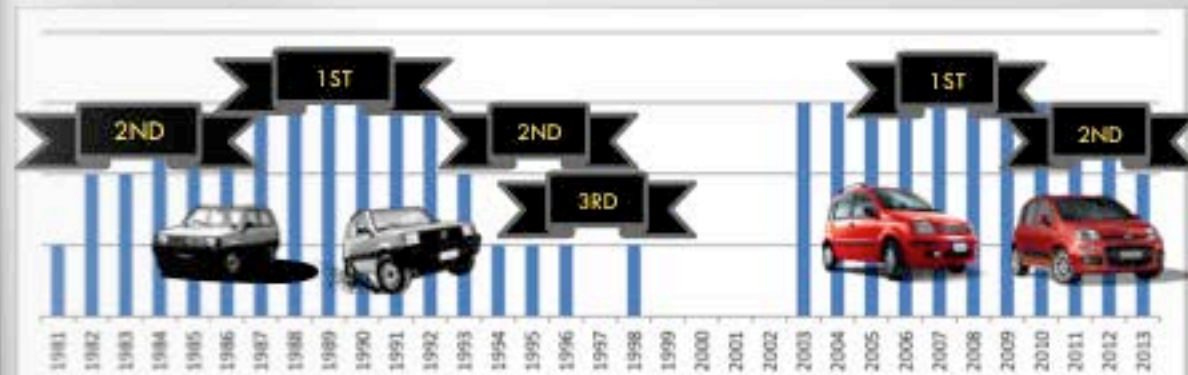
Average msrp : 16.500€

## A BROAD CUSTOMER TARGET



IT HAS BEEN A LEADER SINCE 1980

MORE THAN 6.5 MILLION UNITS SOLD IN 33 YEARS



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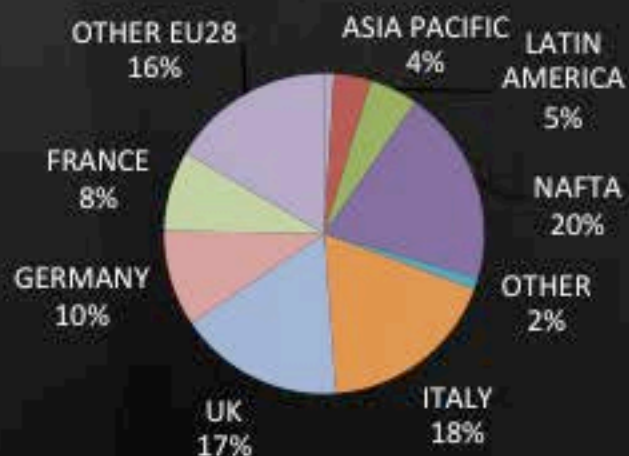
*"The Off"*

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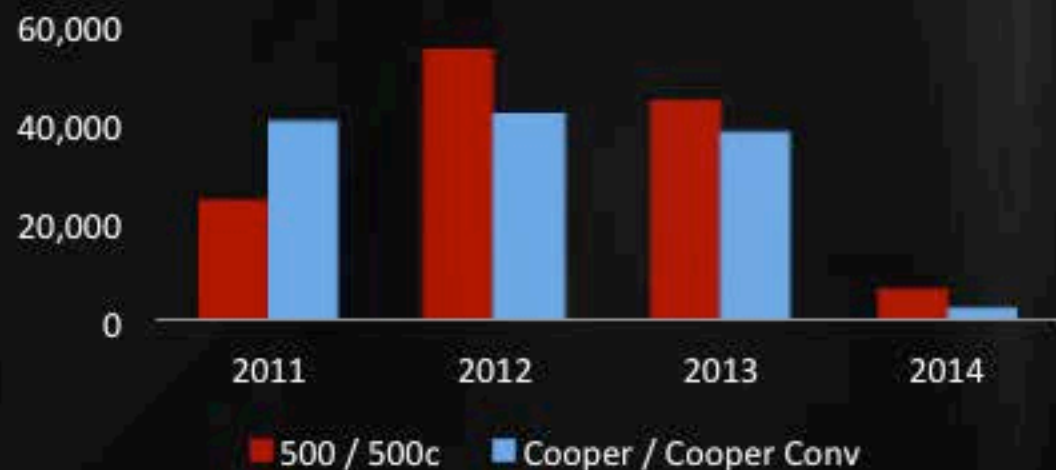
LCV  
 Derivative

LCV  
 Derivative

## 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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Small SUV

Compact



"All"

"The Official C"

"An Icon of Italian Lifestyle"



"Cool & Capable"



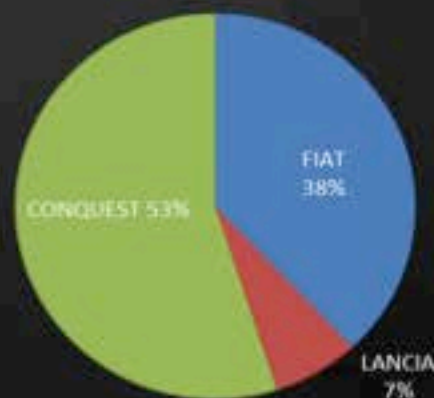
LCV  
 Derivative



LCV  
 Derivative

## 500L CUSTOMER PROFILE

*It brings new customers---*



HIGH LEVEL OF CONQUEST



CUSTOMERS COME FROM A BROAD VARIETY OF SEGMENTS

## THE 500L 'COOL & CAPABLE'

### TOP 2 REASONS FOR PURCHASE

INTERIOR ROOMINESS +60%

STYLING/APPEARANCE +88%



500L vs 50 Segment

*--- and adds excitement to a boring segment*

### 500L CUSTOMER SEGMENTATION vs LO SEG.



**YOUNGS (17-29) +103%**



**WITH KIDS <10Y/O +65%**



**WOMEN +19%**

Source: 500L (no Trekking/Living), NCBS, FY13 3MM

### 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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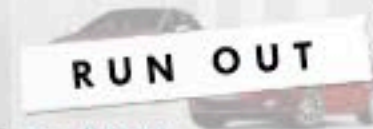
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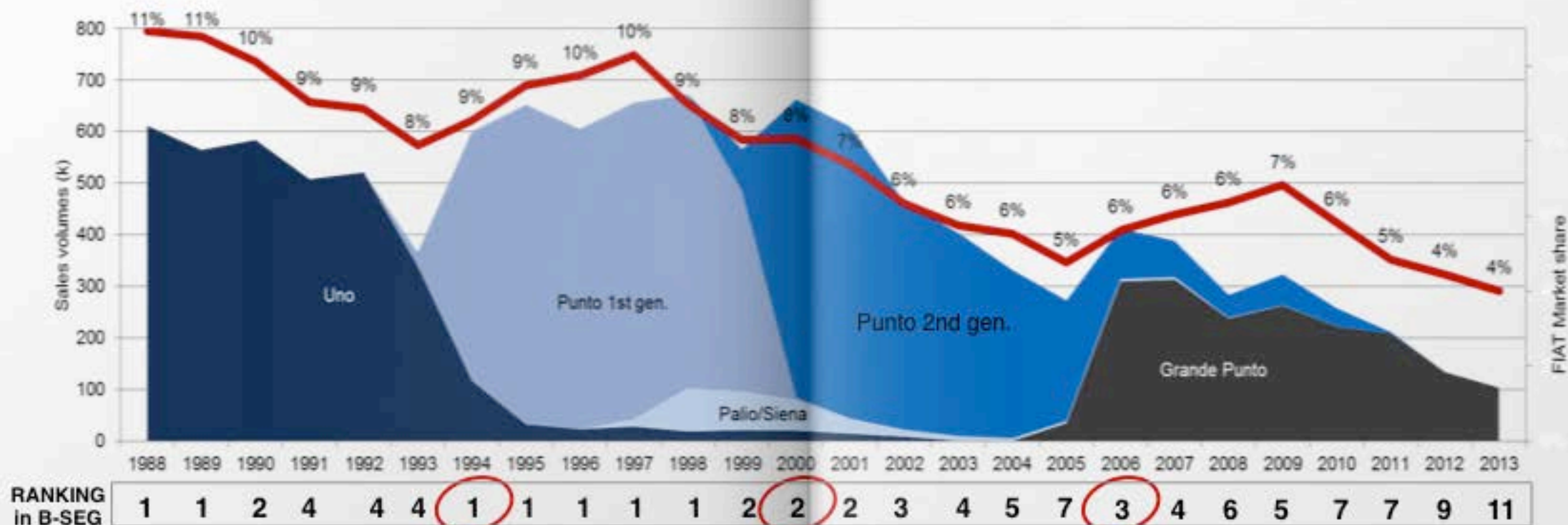
Small Car



LCV  
 Derivative

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## FIAT IS STRONGLY ROOTED IN THE B-SEGMENT



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

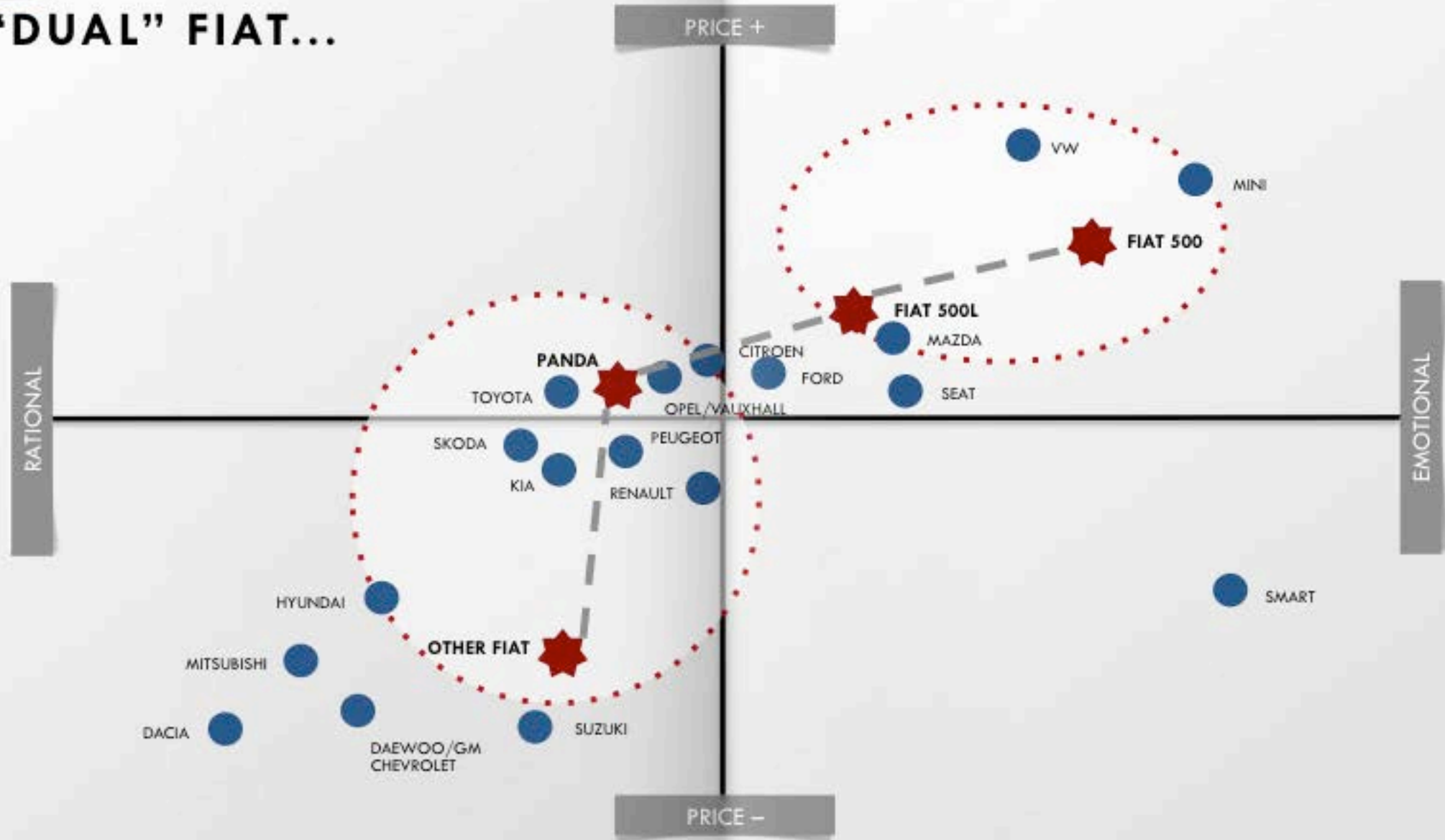


**GRANDE PUNTO**  
'05 to...  
2 Mil Cars sold



**DON'T BE MAINSTREAM  
HAVE A STORY**

# A "DUAL" FIAT...



PRICE GAP VS COMPETITION (IN SEGMENTS OF PRESENCE)

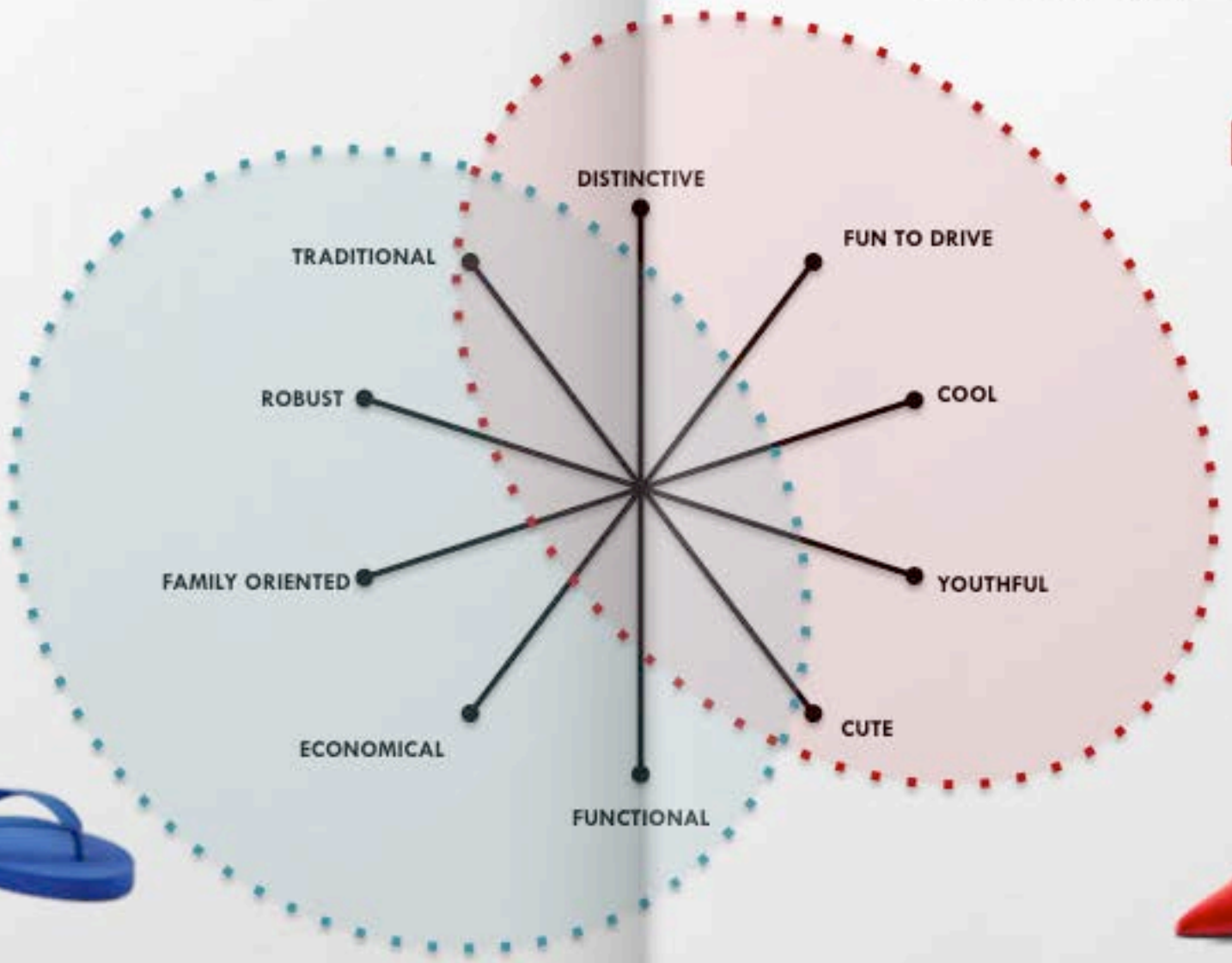
NCBS FY 2013 - HATCH - SEGMENT A, B, C, LO 5MM (Fiat excl. Abarth, Mini excl. Cooper S)

...FOR A DUAL MARKET

RATIONAL



EMOTIONAL



LOWER MAINSTREAM

UPPER MAINSTREAM



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.

# UPPER MAINSTREAM

Δ IMAGE VS. MARKET AVERAGE

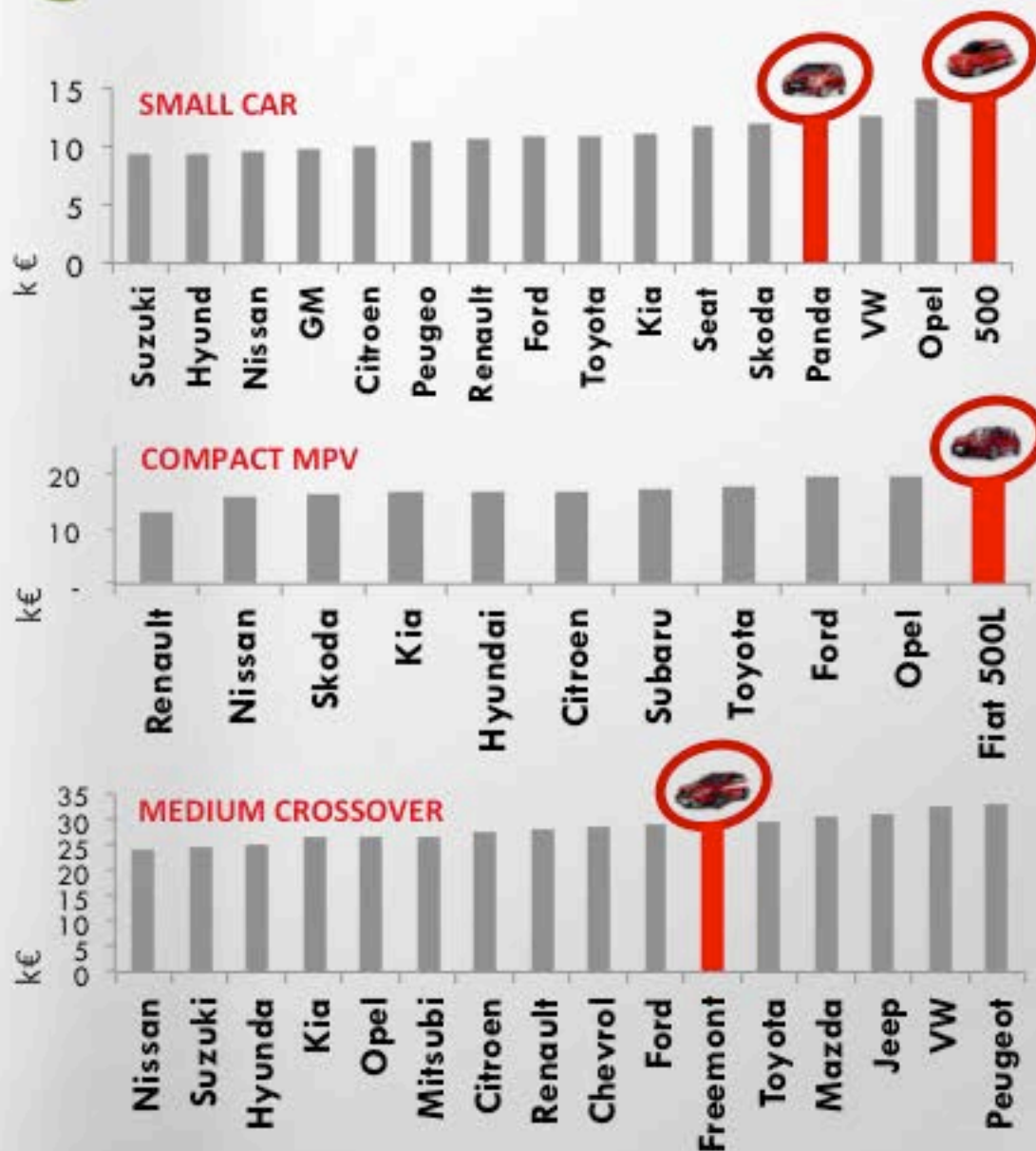


500 COMPETES CREDIBLY WITH THE BEST

Zero equals market average

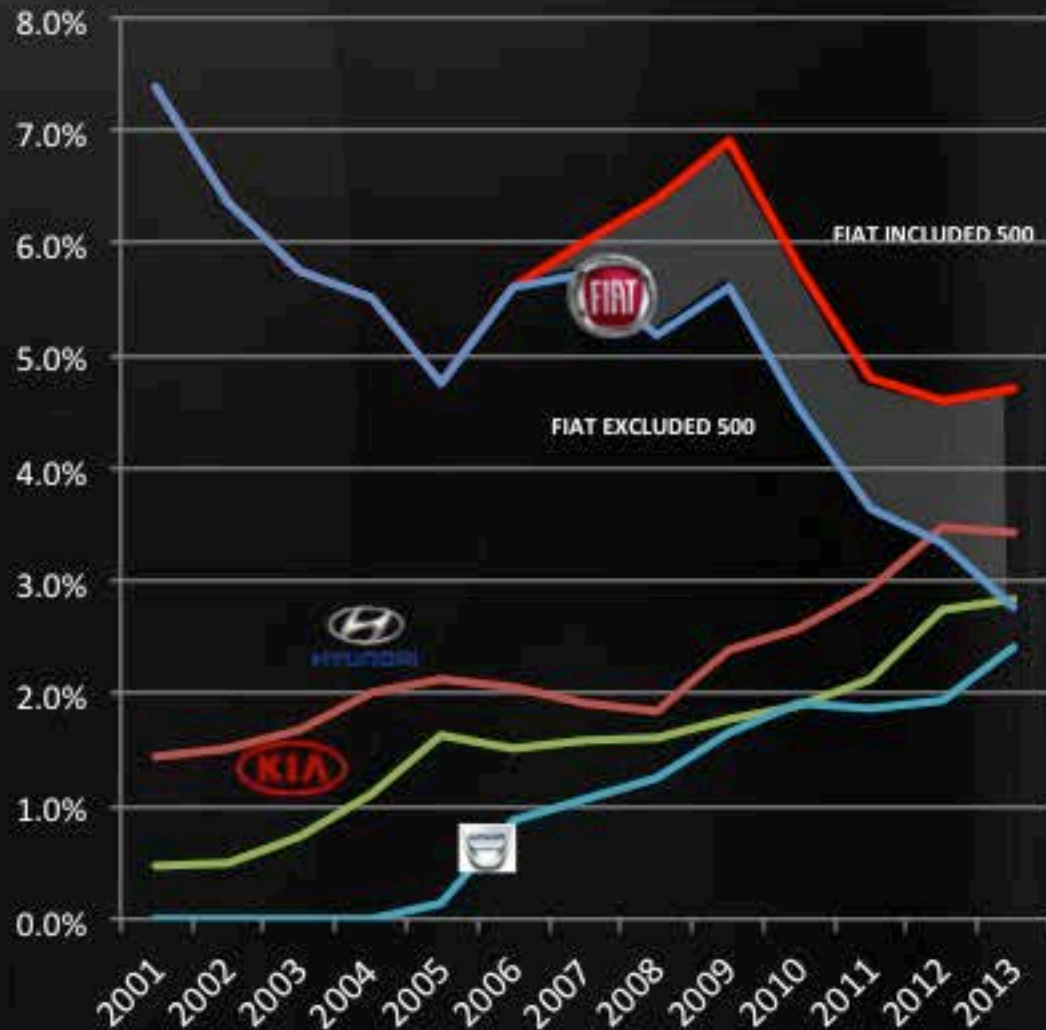


## AVERAGE PRICE PAID

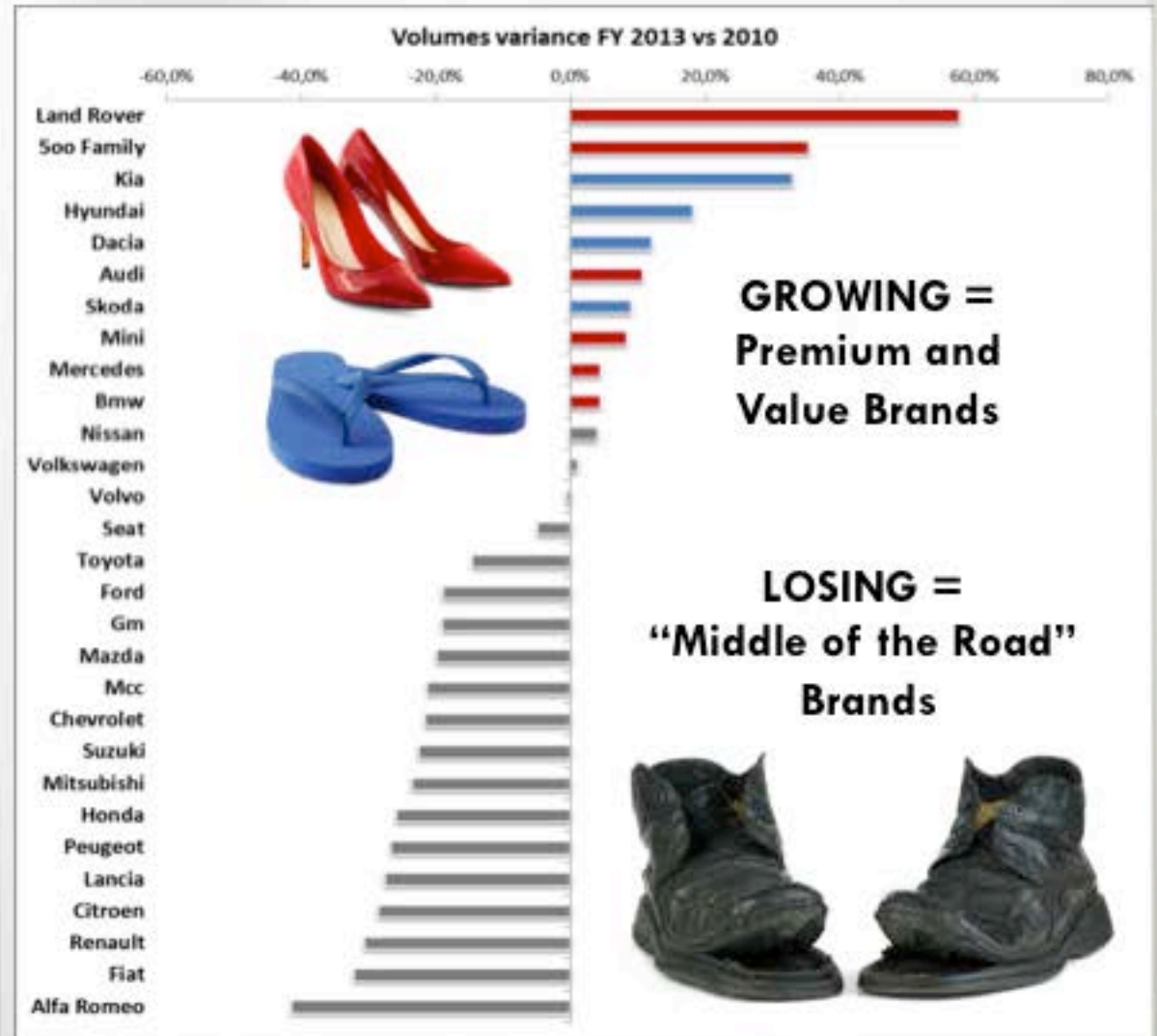


(Source: Car Park Study 2013)

# LOWER MAINSTREAM



# WE NEED TO TAKE A STAND



**GROWING =  
Premium and  
Value Brands**

**LOSING =  
"Middle of the Road"  
Brands**



SNAPSHOT OF TODAY

TWO MISSIONS

ONE VISION

THE PLAN

ONE VISION

FUNCTIONAL



ASPIRATIONAL

## CONSUMER GOODS

## MAINSTREAM



## UPPER MAINSTREAM



# ITALIAN DESIGN

## MAINSTREAM



## UPPER MAINSTREAM



ONE VISION



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 X 1/9**  
1972-1989



**FIAT 130 COUPÉ**  
1966-1977



**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 PANDA**  
2011-201...



**FIAT 500**  
2007-201...



**FIAT 500L**  
2012-201...



ONE VISION

LET'S AVOID MISUNDERSTANDING

NOT A LOW COST BRAND



SMART AFFORDABLE SOLUTIONS

NOT A PREMIUM BRAND



**Kartell**

A LITTLE EXTRA PRICE TO FEEL SPECIAL  
THE COOL ITALIAN BRAND



SNAPSHOT OF TODAY

TWO MISSIONS

ONE VISION

THE PLAN



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

● NEW UNO FL

A-SEGMENT ●

● NEW PUNTO

● B-CUV

● NEW PALIO

COMPACT PICKUP ●

NEW GRAND SIENA ●

NEW SIENA ●



CHINA

广汽乘用车 GALIENI

广汽乘用车正式推出新车型  
2014年3月7日 正式上市

时尚版 (手动) 108,800元  
 舒适版 (手动) 121,800元  
 时尚版 (双离合) 122,800元  
 舒适版 (双离合) 138,800元  
 豪华版 (双离合) 158,800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

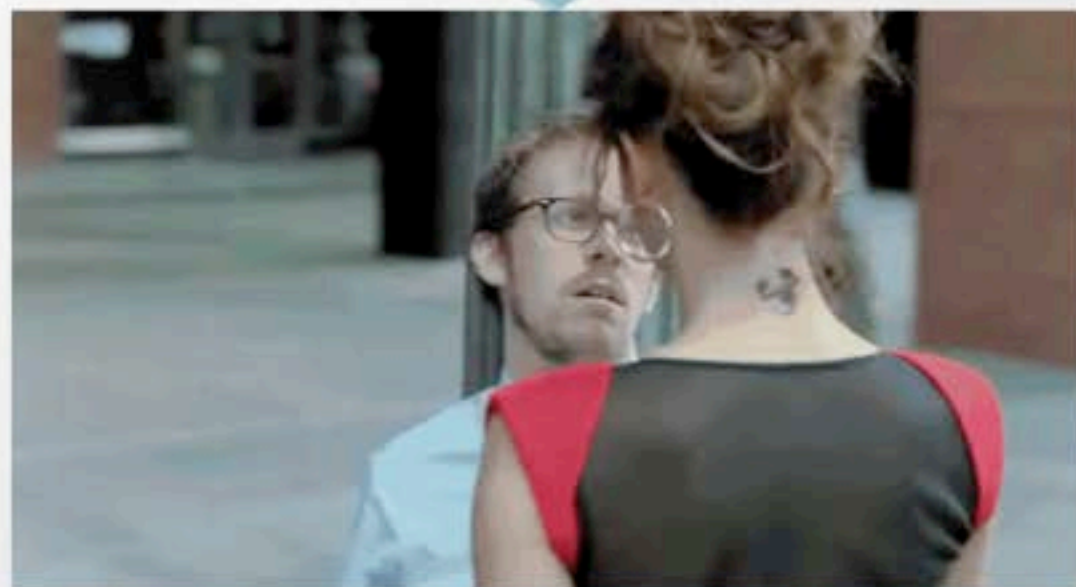


	2014	2015	2016	2017	2018
LATAM	● NEW UNO FL	A-SEGMENT ● COMPACT PICKUP ●	● NEW PUNTO ● B-CUV NEW GRAND SIENA ●	● NEW PALIO	NEW SIENA ●
APAC	● LINEA ● OTTIMO ● PUNTO	● AVVENTURA ● OTTIMO CROSS	D SEDAN ●	● NEW GRAND SIENA ● NEW AVVENTURA	● NEW PUNTO ● COMPACT CUV

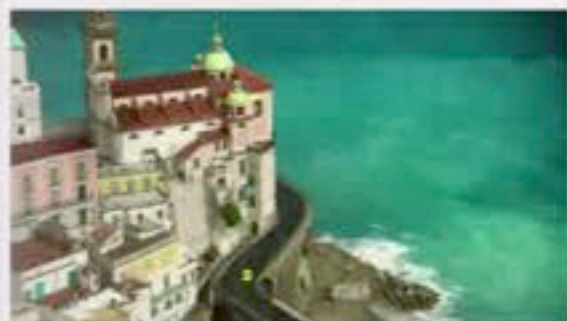
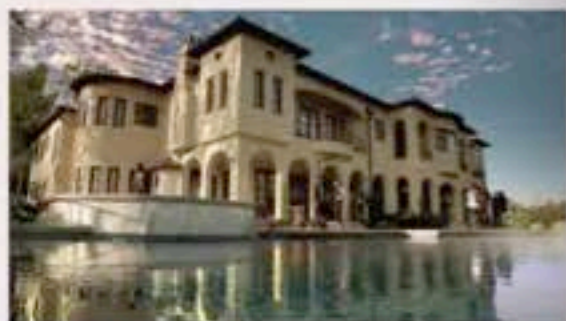
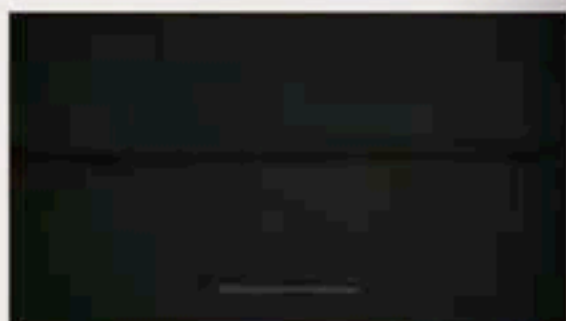
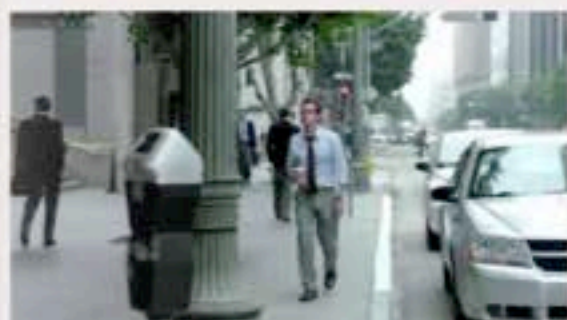


NAFTA

SEDUCTION  
ASPIRATION



BRAND POWER  
PRICING POWER



**TODAY**

**FUTURE**



## TODAY



## FUTURE



TODAY



500L



500



FUTURE



500L



500



500X



SPECIALTY

## TODAY

## FUTURE



500L



500



500L



500



500X



SPECIALTY



## TODAY



## FUTURE



## TODAY

## FUTURE



**RATIONAL**  
**OPPORTUNITY**  
**HISTORY**

**ASPIRATIONAL**  
**CHALLENGE**  
**CHANGE**



EUROPE

**CLARIFY**  
**THE OBJECTIVE**

**PURIFY**  
**THE DNA**



PRICE+

PRICE-

RATIONAL

EMOTIONAL



LCV DERIV.



PUNTO



COMPACT



FREEMONT



PANDA



500L



500X



SPECIALTY



500

EACH MODEL COMPARED TO

ITS SEGMENT OF REFERENCE.

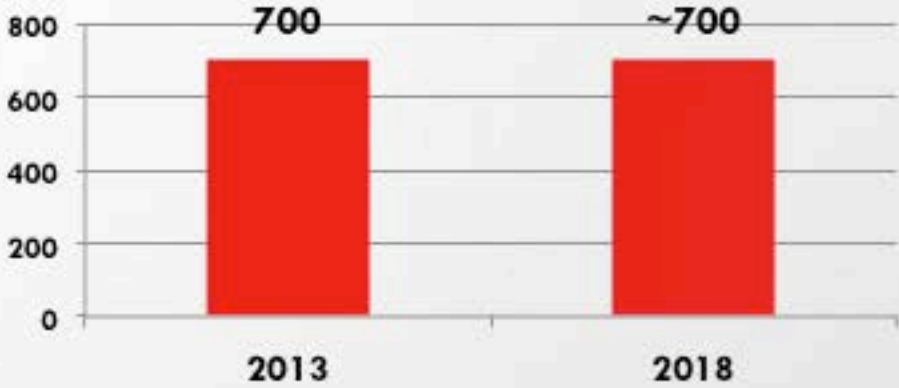
# FIAT GLOBAL LRP

- LATAM
- APAC
- NAFTA
- EMEA

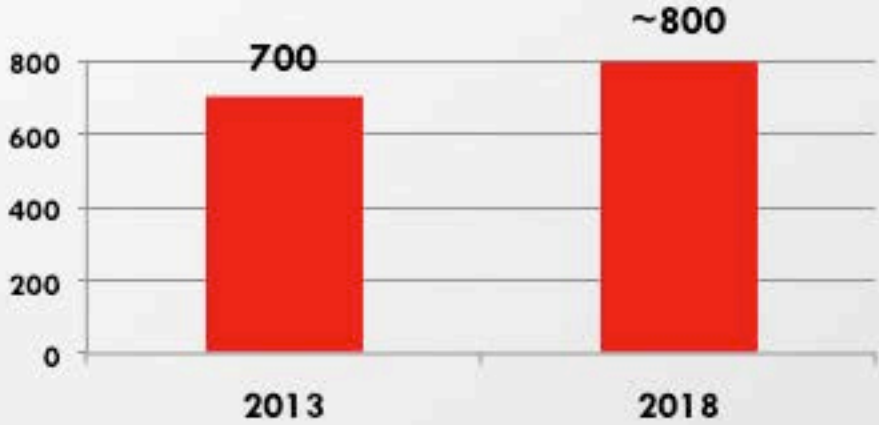
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APAC	● OTTIMO ● PUNTO	● AVVENTURA ● OTTIMO CROSS	D SEDAN ● ● NEW AVVENTURA	● NEW PUNTO ● NEW GRAND SIENA	● COMPACT CUV
NAFTA		● 500X ● SPECIALTY			
EMEA	● 500X ●	COMPACT SEDAN ● SPECIALTY ●	● COMPACT HATCH ● COMPACT SW B SEGMENT ●	COMPACT CUV ●	● NEW PANDA

# VOLUMES & MIX

## EMEA



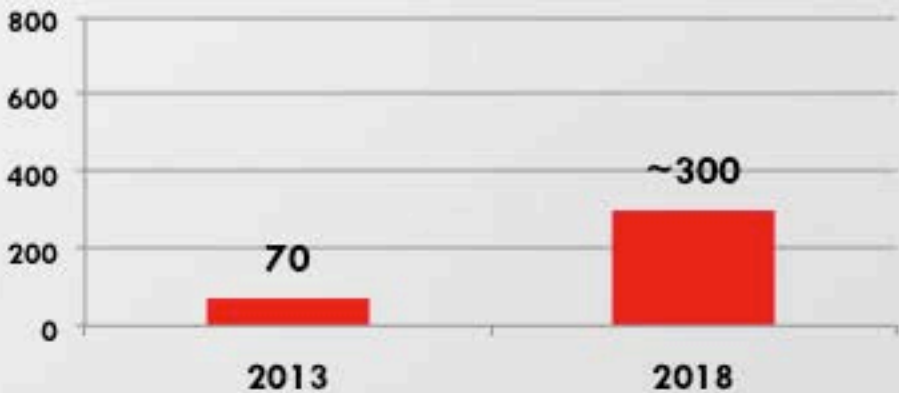
## LATAM



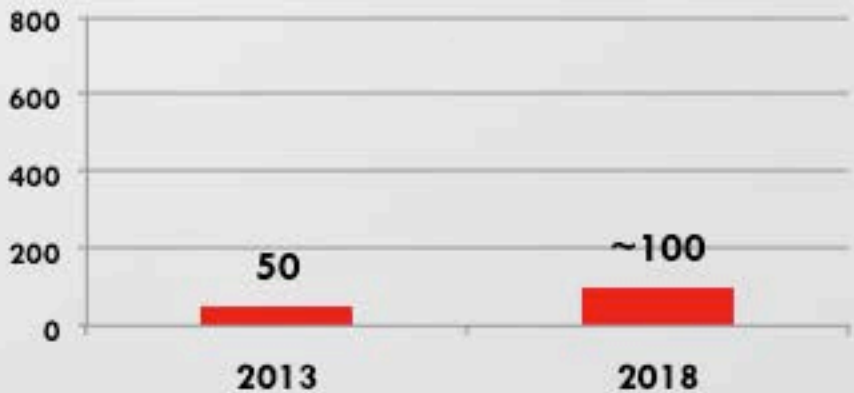
## GLOBAL



## APAC



## NAFTA



**THE DEPLOYMENT**

**PRODUCT**

**MARKETING**

**SALES**



**PRODUCT**

**SPACE EFFICIENCY**  
(roominess, trunk capability)

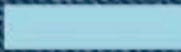
*= aligned with competition*



**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



THE PLAN

TWO SOULS

WE

**INCLUSIVE**

**STATUS SIMPLE**

**THE CAR YOU NEED**

**LOGIC**

ME

**EXCLUSIVE**

**STATUS SYMBOL**

**THE CAR YOU WANT**

**MAGIC**



LOGGIC

MAGGIC

LOGIC

WILL GET YOU

FROM

A → TO → Z

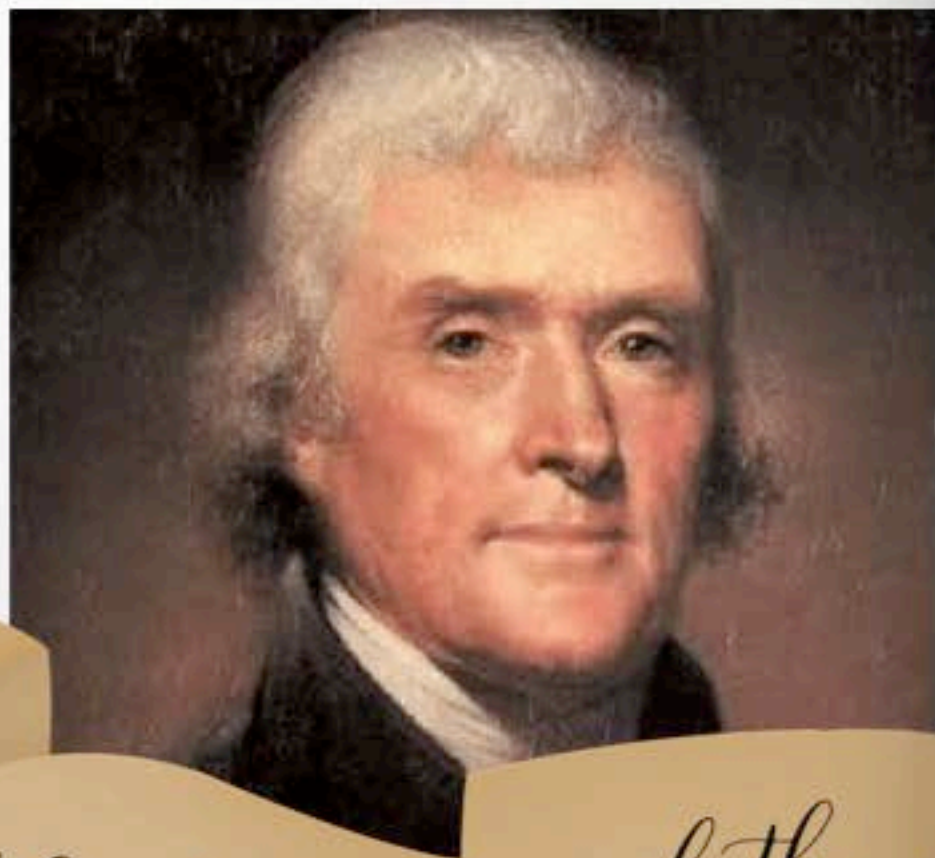
THE  
MAGIC  
OF IMAGINATION

• WILL TAKE YOU •

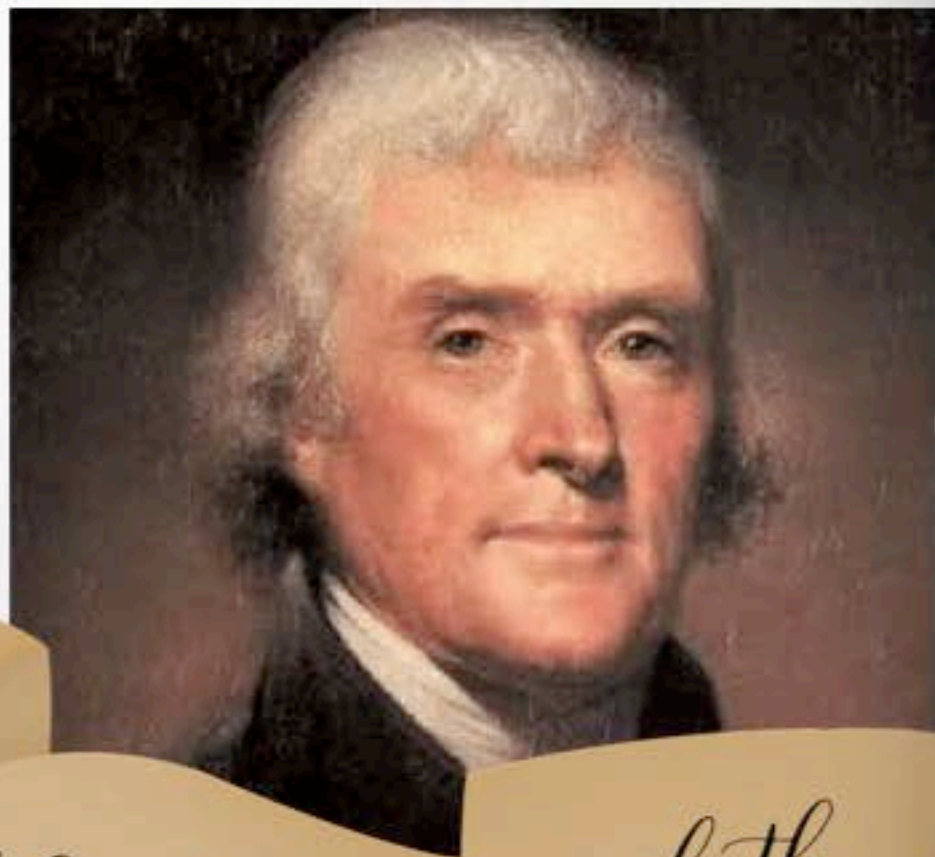
EVERYWHERE ELSE

• ALBERT EINSTEIN •





*Life, Liberty, and the pursuit of Wealth*



*Life, Liberty, and the pursuit of Happiness*



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