

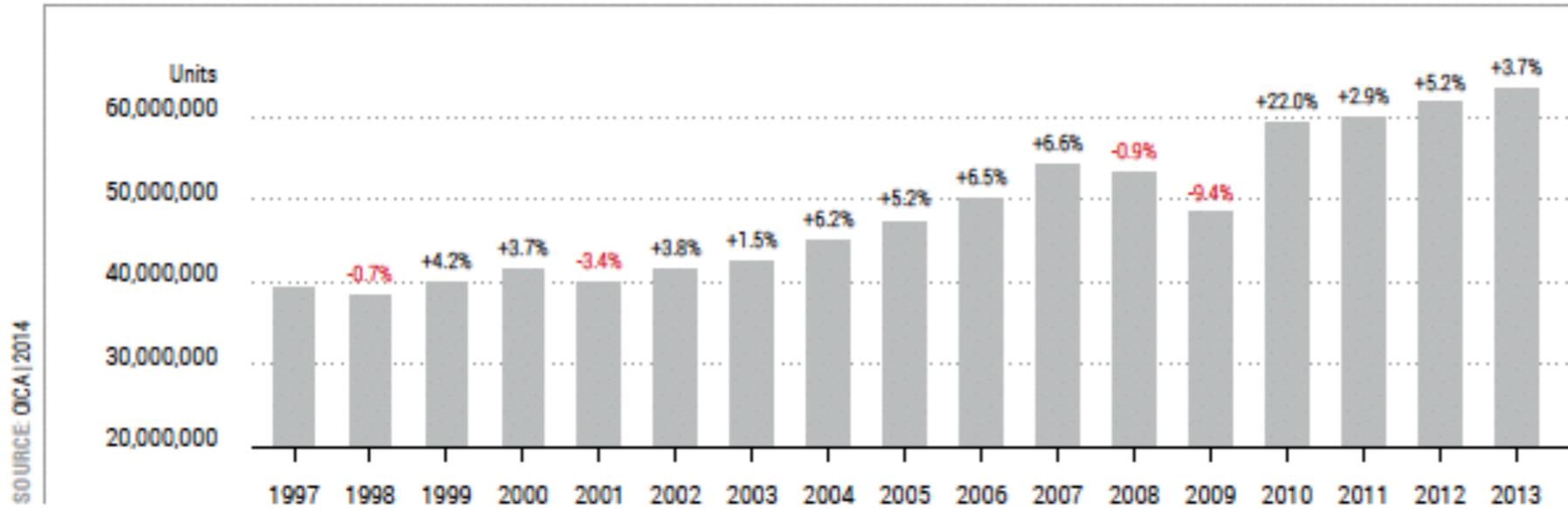


La crisi in Europa del settore automotive e le risposte sindacali

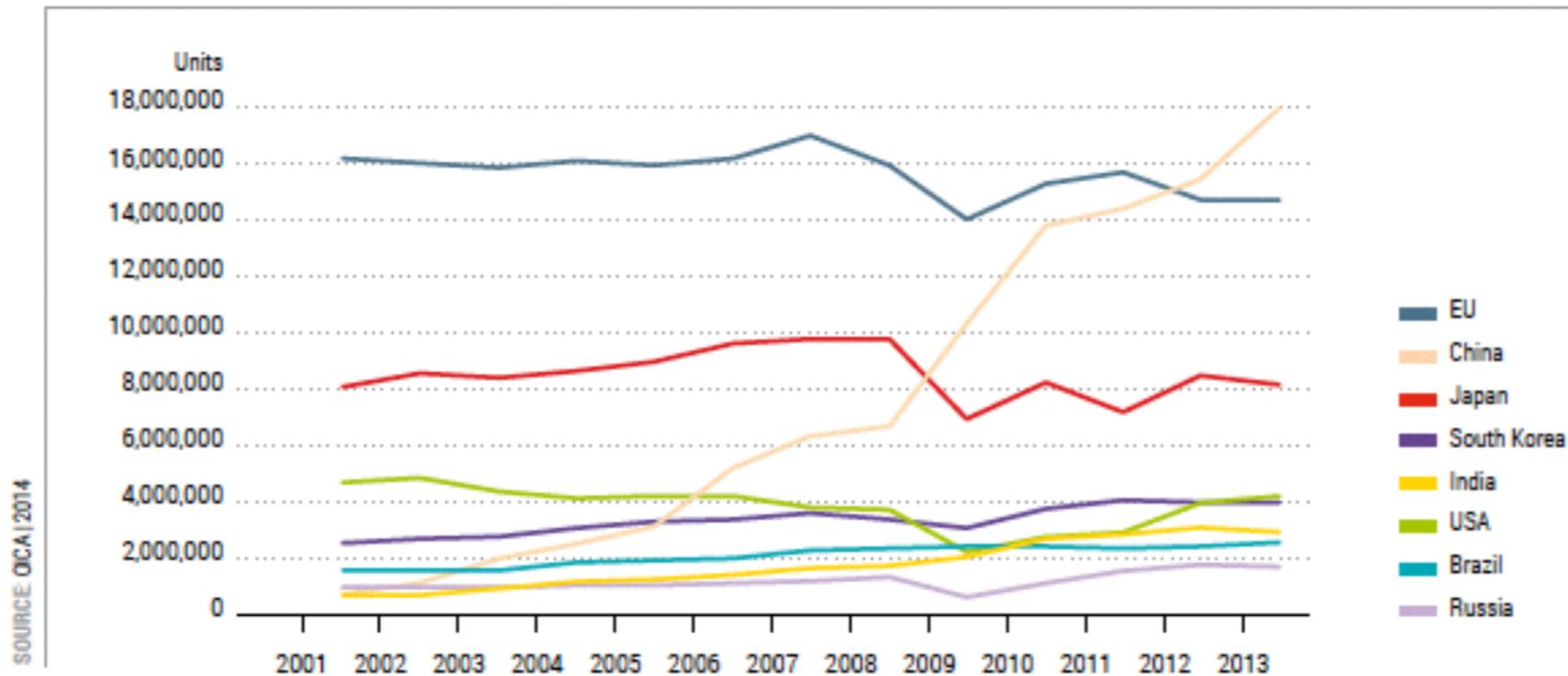
Roma 9 dicembre 2014

presentazione di Gianni Alioti - Ufficio Internazionale Fim-Cisl

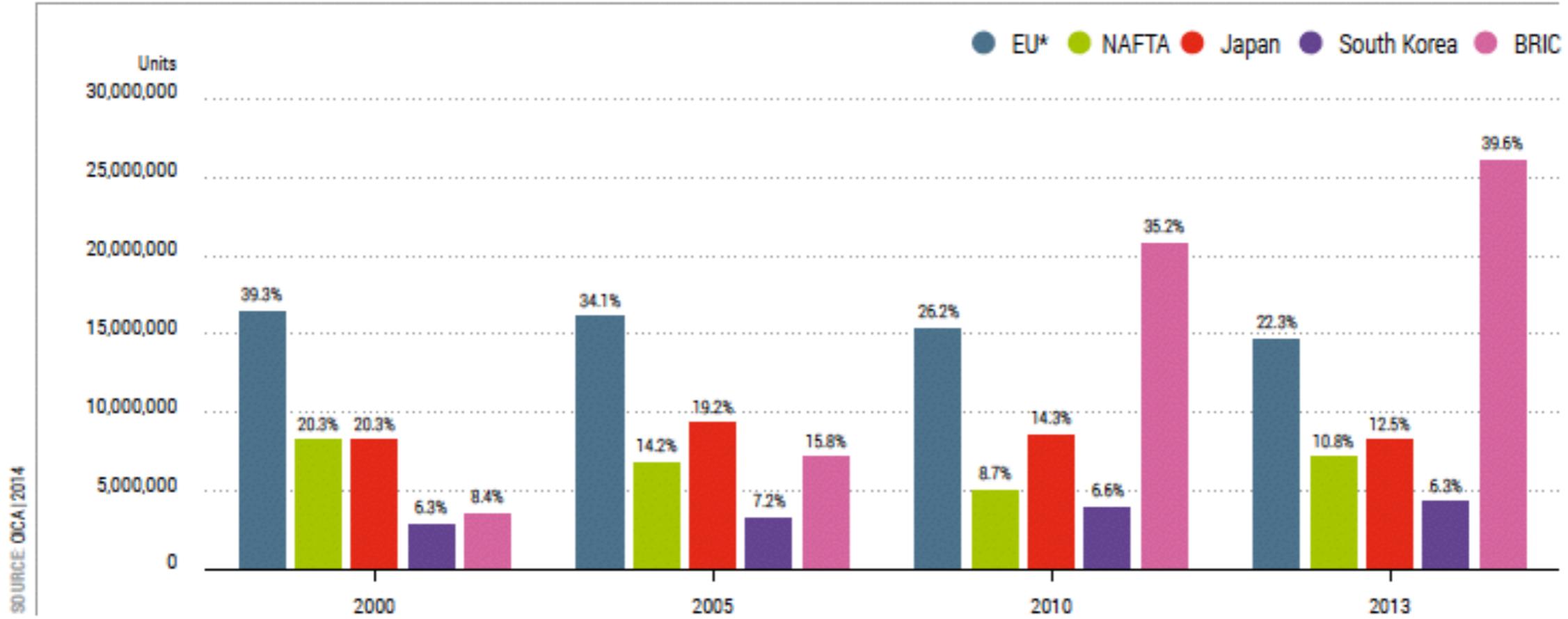
World passenger car production — trend | 1997 – 2013



World passenger car production — international comparison | 2001 – 2013



Passenger car production — international comparison, % share | 2000 – 2013



SOURCE: OICA | 2014

Passenger car production — world | 2013

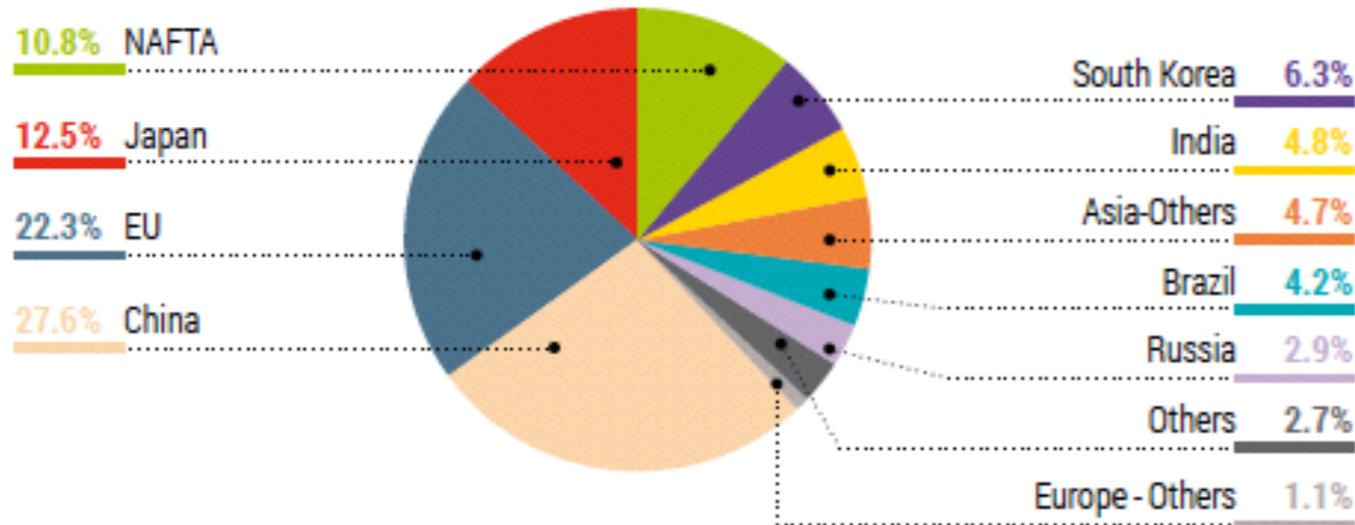
	VOLUME	% SHARE
EU* 	14,616,202	22.3%
NAFTA 	7,084,136	10.8%
Japan 	8,189,323	12.5%
South Korea 	4,122,604	6.3%
BRIC 	25,886,146	39.6%
Others	5,534,876	8.5%
Total World	65,433,287	100%

SOURCE: OICA | 2014

* constant EU27 perimeter throughout the period

Passenger car production — world, % share | 2013

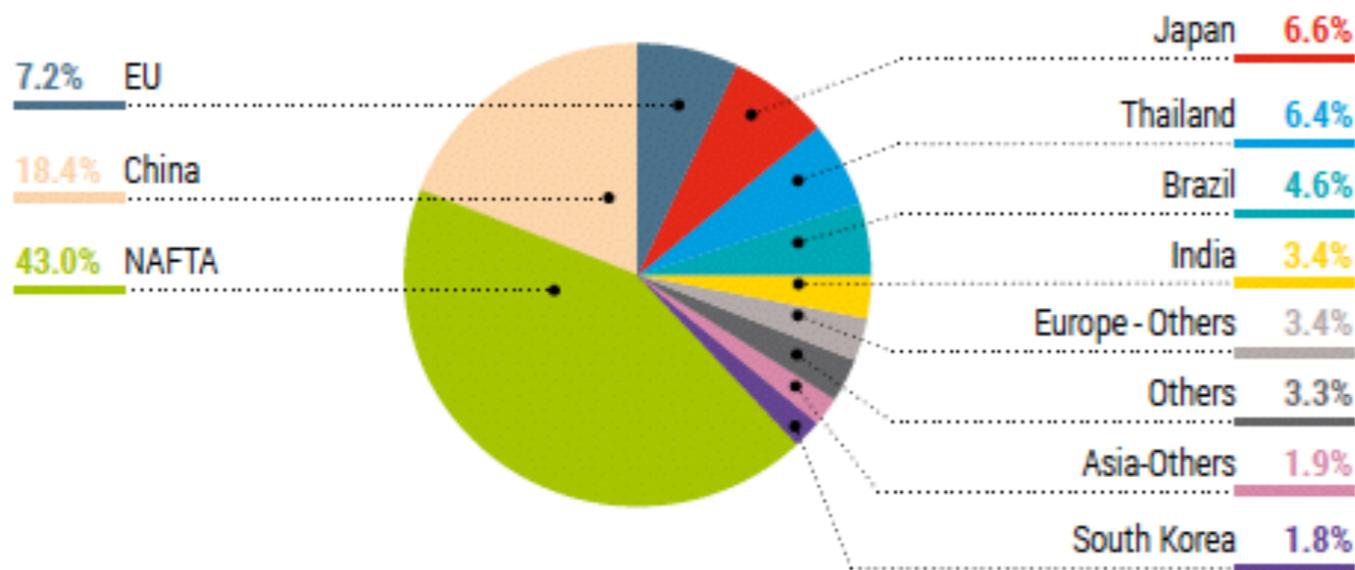
SOURCE: ACEA, OICA | 2014



Asia - others : Australia, Indonesia, Malaysia, Taiwan, Thailand
Europe - others : Serbia, Turkey, Ukraine
Others : Argentina, Egypt, Iran, South Africa, Uzbekistan

Commercial vehicle production — world, % share | 2013

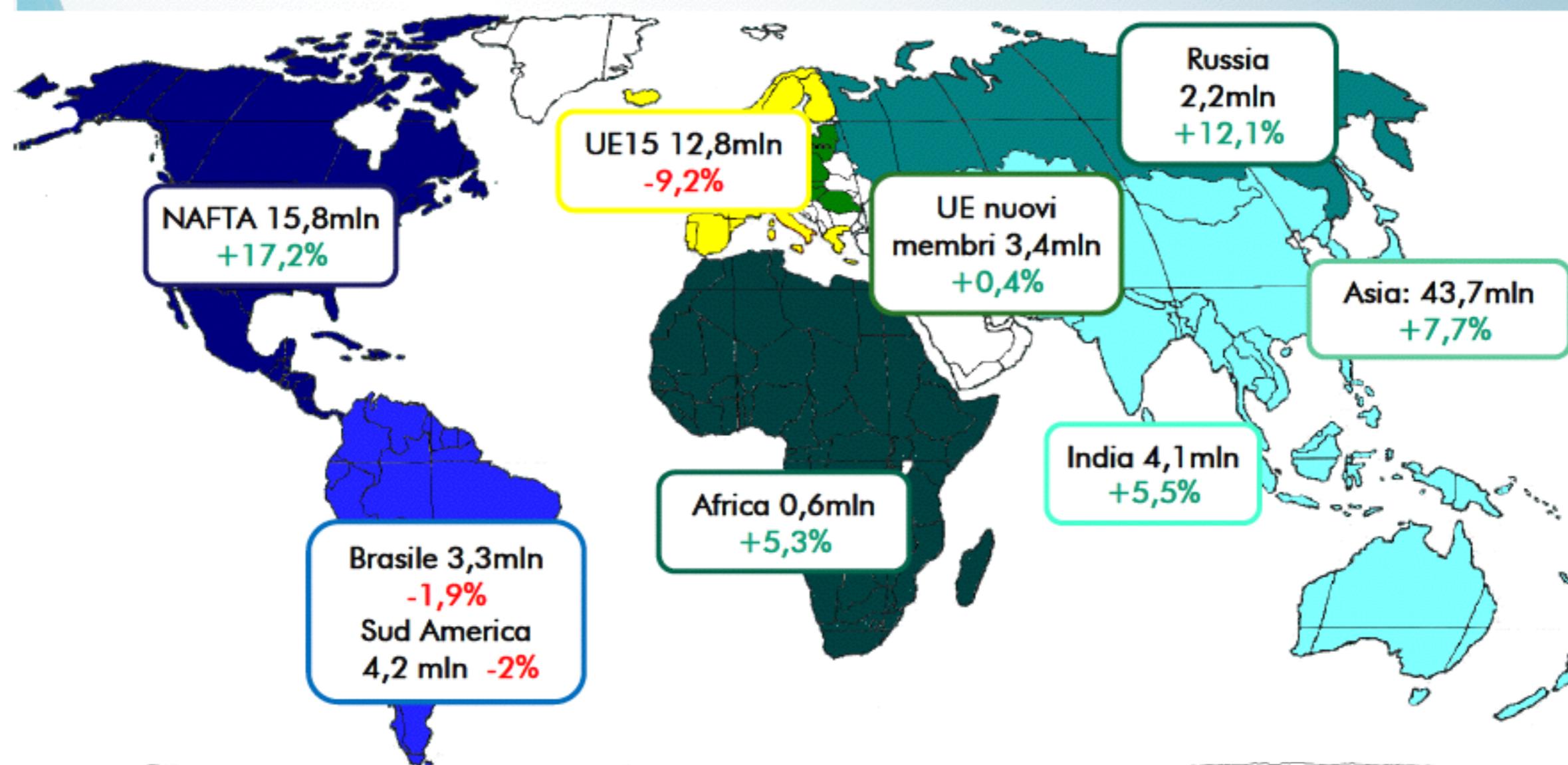
SOURCE: ACEA, OICA | 2014



Asia - others : Australia, Indonesia, Malaysia, Taiwan
Europe - others : Russia, Serbia, Ukraine
Others : Argentina, Egypt, Iran, South Africa, Uzbekistan

Nel 2012 la **produzione** continua a crescere (84 mln, +5,3%), l'**Europa** e Sud America in controtendenza

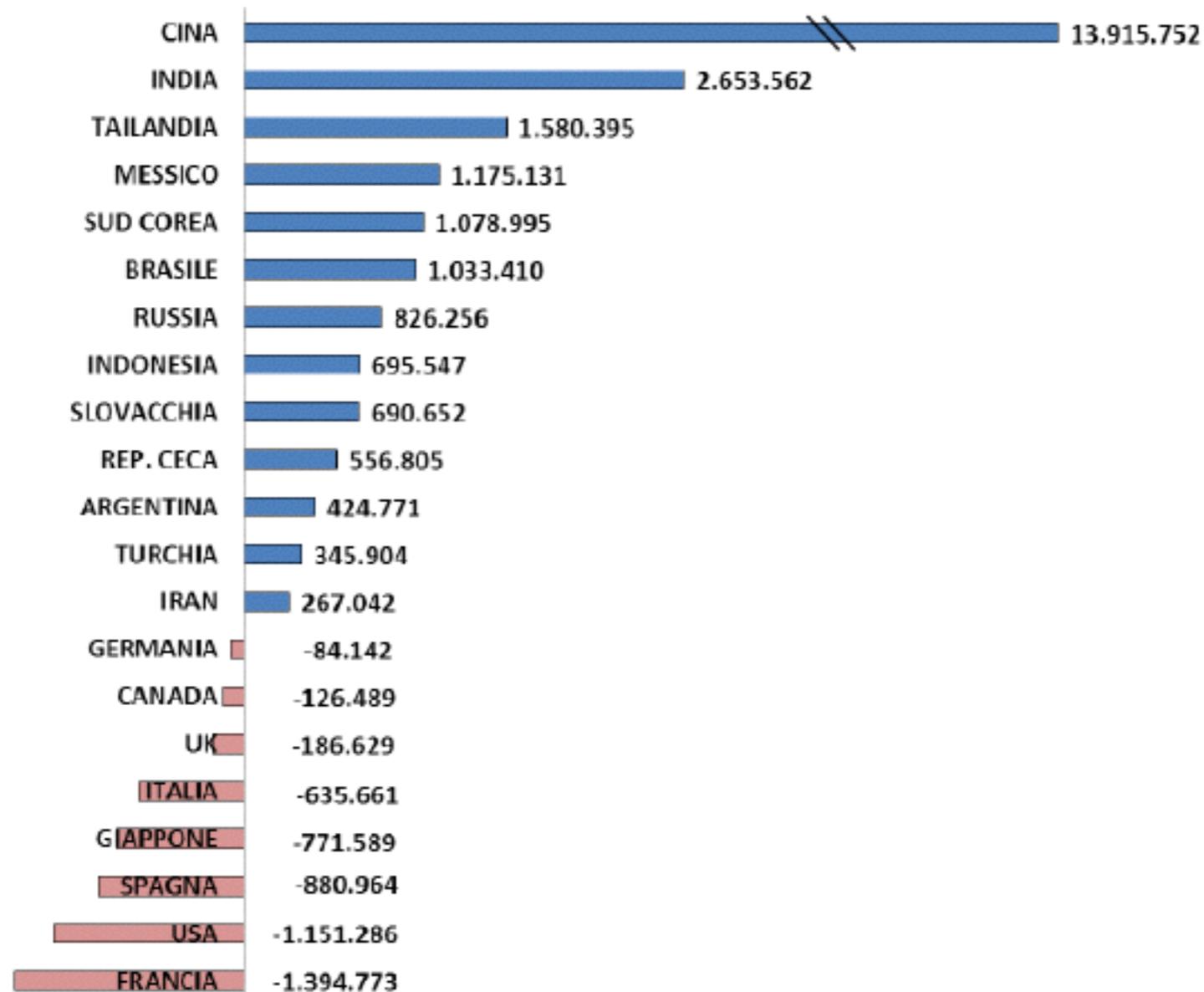
Produzione autoveicoli (AUTO,VIC,BUS) 2012
(assoluta e var. % su 2011) dati *OICA*



Dall'inizio della crisi gli equilibri sono cambiati. Si affacciano nuove piattaforme industriali che attirano **investimenti**

Produzione autoveicoli

Variazione assoluta 2012 su media 2000-08 OICA



Quote di produzione mondiale 2012 vs (media 2000 – 2008)

Asia 52% (38%)
Europa 24% (32%)
NAFTA 19% (25%)

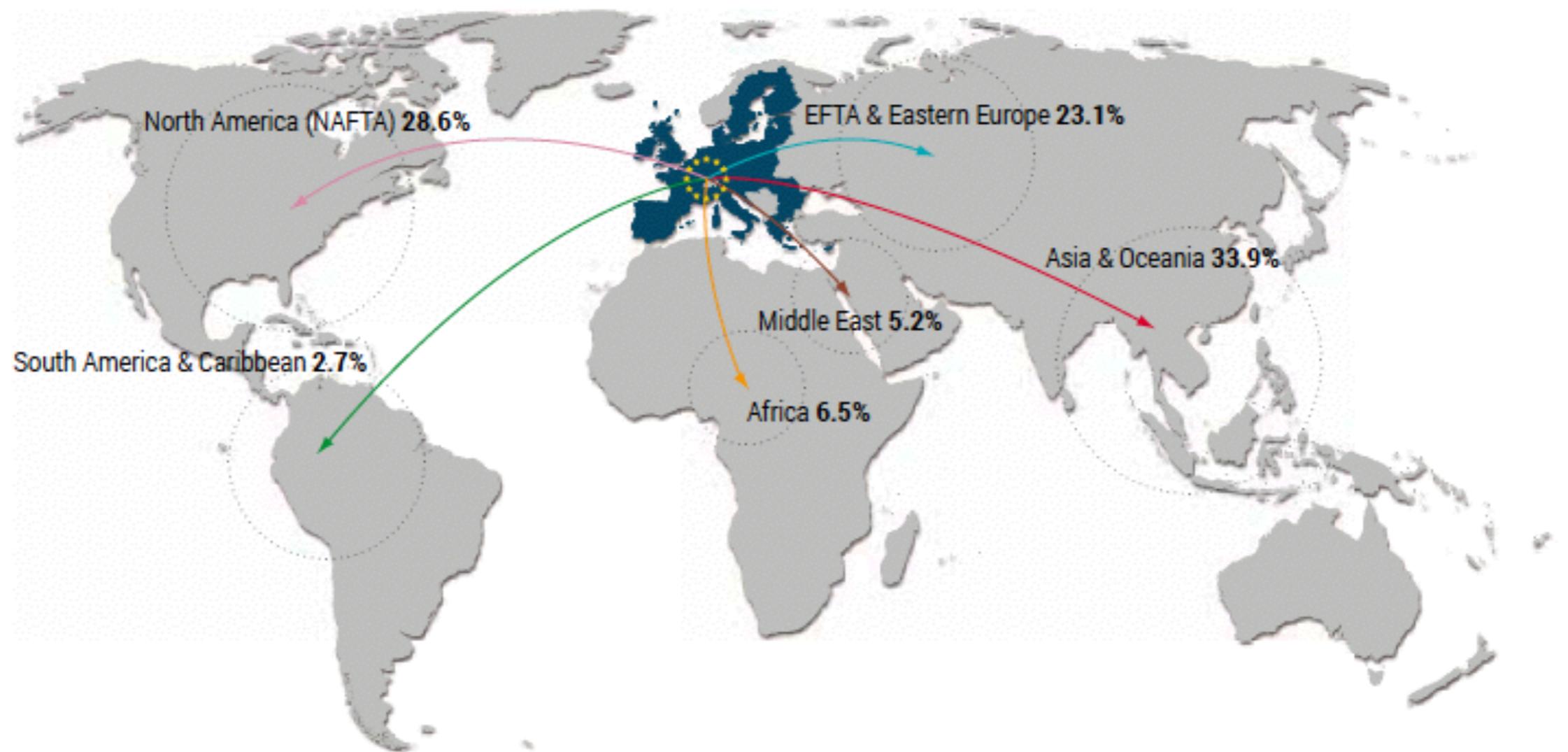
Motor vehicle production in the EU – by country | 2013

			 + 	TOTAL
 AUSTRIA	146,566		19,862	166,428
 BELGIUM	449,600		30,564	480,164
 CZECH REPUBLIC	1,128,473		4,458	1,132,931
 FINLAND	8,000			8,000
 FRANCE ²	1,460,000	280,000	n.a.	1,740,000
 GERMANY ²	5,439,904	278,318	n.a.	5,718,222
 HUNGARY	220,000		2,400	222,400
 ITALY	388,465	236,040	33,702	658,207
 NETHERLANDS ²	0	0	0	0
 POLAND	475,000	104,055	4,203	583,258
 PORTUGAL	109,698	40,918	3,400	154,016
 ROMANIA	410,959		38	410,997
 SLOVAKIA	975,000			975,000
 SLOVENIA	89,395	4,339		93,734
 SPAIN	1,719,700	419,954	23,684	2,163,338
 SWEDEN ²	161,080		n.a.	161,080
 UNITED KINGDOM	1,509,762	68,823	18,848	1,597,433
 EU ¹	14,616,202	1,429,748	137,774	16,183,724

SOURCE: ACEA (NATIONAL AUTOMOBILE ASSOCIATIONS) | 2013

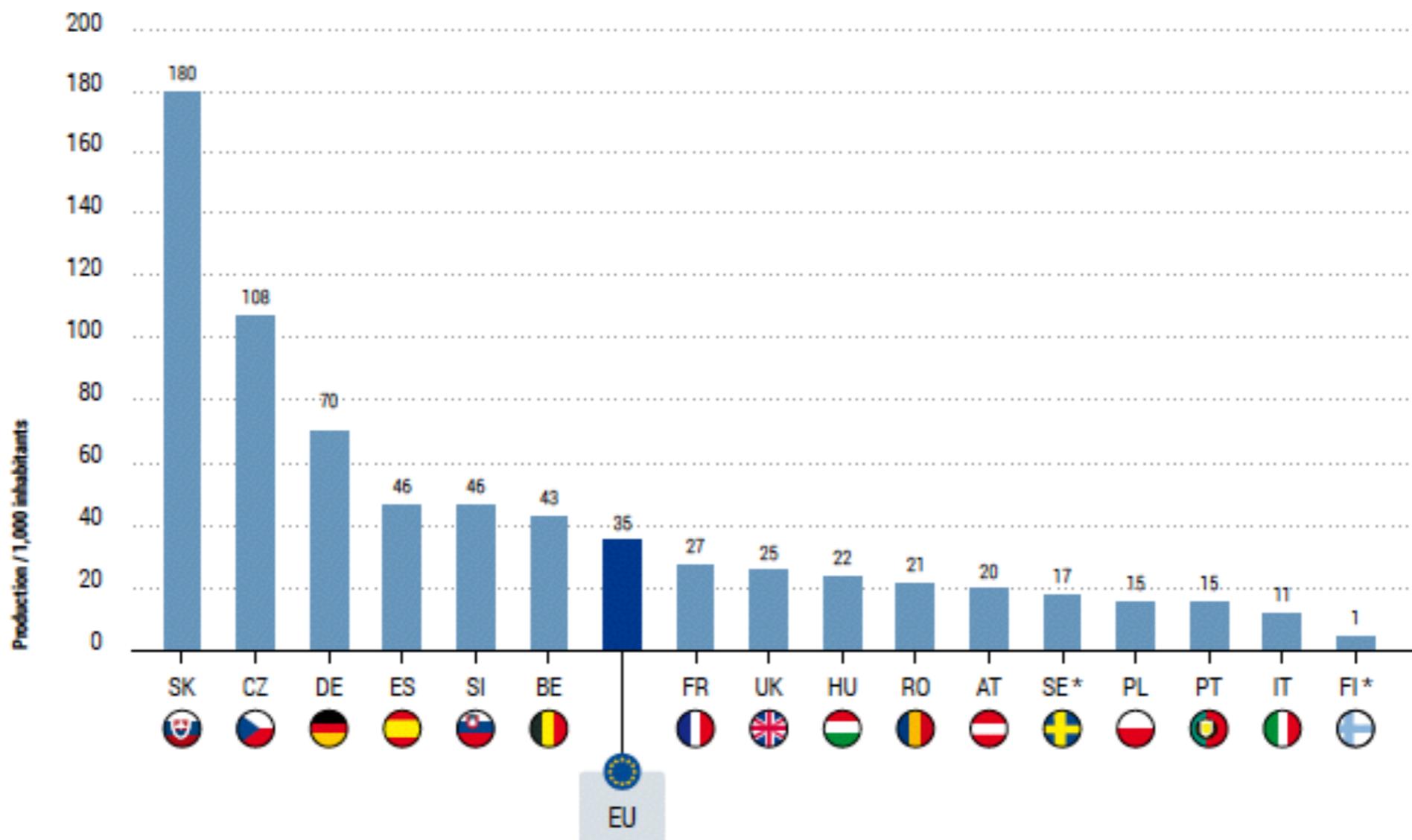
1. Double countings are deducted from the totals
2. Figures for certain categories were not communicated in 2013

EU exports of passenger cars — by value, % share | 2013



Motor vehicle production per 1,000 inhabitants | 2013

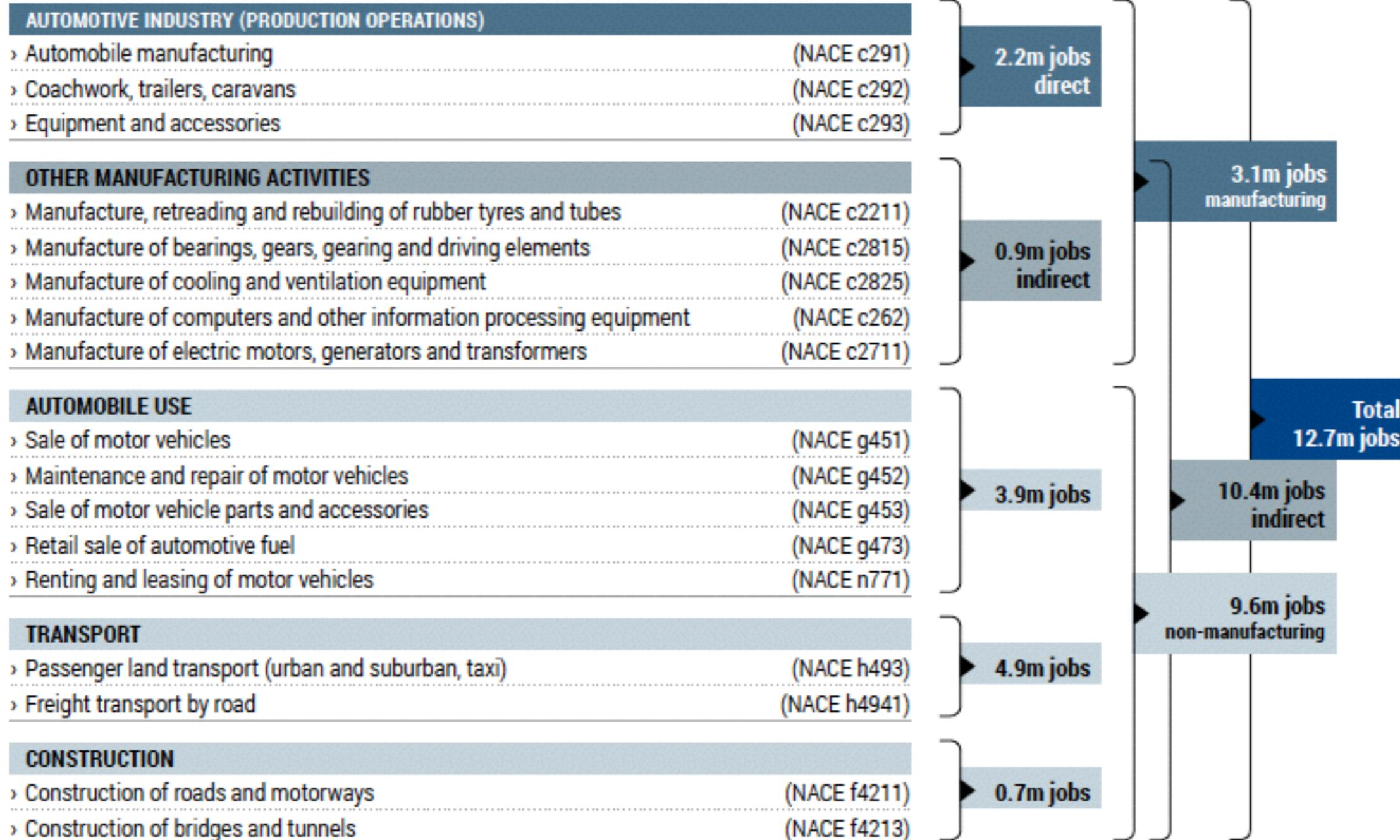
SOURCE: EUROSTAT, ACEA | 2014



* only production of cars available in 2013

The automotive industry generates 12.7 million jobs in the EU

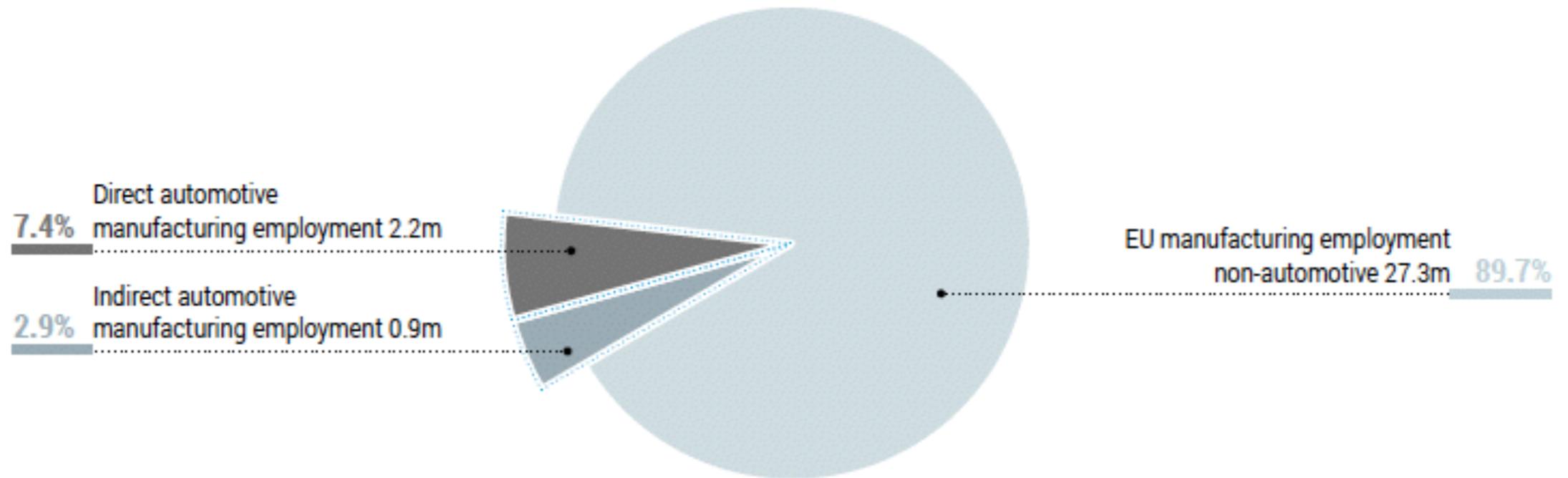
Automobile sector: direct and indirect* employment



SOURCE: BASED ON EUROSTAT MOST RECENT COMPREHENSIVE DATA AVAILABLE | 2011

* Indirect employment data does not report employment in the raw materials sector (eg steel, aluminium, glass, etc), textiles, driving schools, licensing activities, vehicle testing, vehicle insurance and financing, etc.

Total manufacturing employment in the EU — % share | 2011



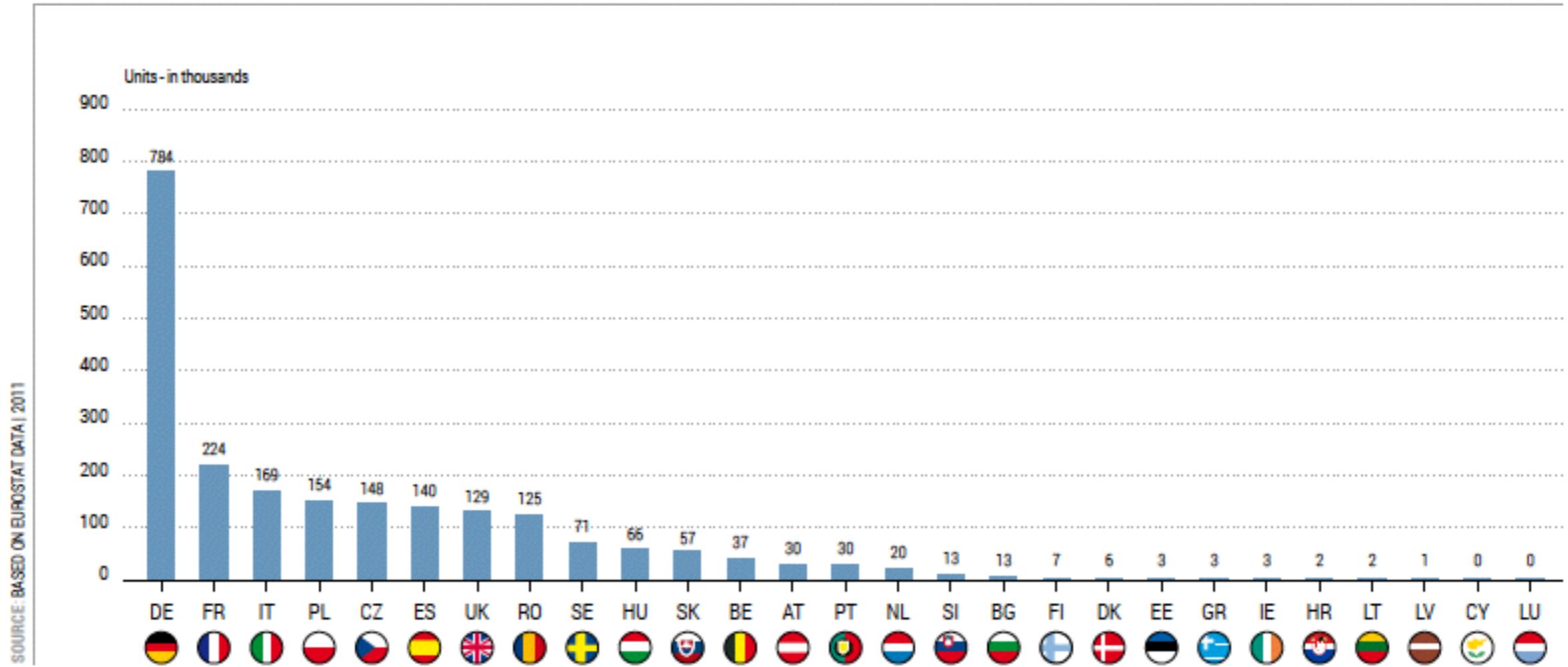
SOURCE: BASED ON EUROSTAT DATA | 2011

Direct automotive employment (manufacturing)	2.2m people	= 7.4% of total EU employment in manufacturing
Manufacturing employment related to the automotive sector	3.1m people	= 10.3% of total EU employment in manufacturing
Total automotive employment (manufacturing, services* and construction)	12.7m people	= 5.8% of EU employed population
EU28 total population in 2011	497.9m people	
EU28 total employment in 2011	217.8m people	
EU28 employed population in the manufacturing sector	30.4m people	= 13.9% of total employed population

SOURCE: BASED ON EUROSTAT MOST RECENT DATA AVAILABLE | 2011

*in activities specified

Direct automotive employment — by country | 2011



Employment in the EU Car Industry

('000)	2008	2011	% change
Belgium	51,7	36,4	-29.6%
Bulgaria	9,9	12,8	29.3%
Czech R.	156,1	152,6	-2.2%
Germany	849,0	837,0	-1.4%
Spain	155,0	141,0	-9.0%
France	187,2	157,2	-16.0%
Italy	188,0	173,9	-7.5%
Hungary	83,2	98,6	18.5%
Netherlands	24,3	20,2	-16.9%
Austria	34,3	31,3	-8.7%
Poland	246,1	208,9	-15.1%
Portugal	41,9	35,6	-15.0%
Romania	103,6	136,4	31.7%
Slovenia	14,4	13,0	-9.7%
Sweden	57,7	57,8	0.2%
Finland	8,8	7,7	-12.5%
Slovakia	79,3	77,4	-2.4%
UK	165,0	134,0	-18.8%
EU	2471,6	2347,3	-5.0%
EU-10	671,0	680,1	1.4%

Source: Eurostat. National Accounts: ACEA

Automobile assembly and production plants in Europe | 2014

EU	Plants
 Austria	5
 Belgium	9
 Bulgaria	1
 Croatia	2
 Czech Republic	8
 Finland	2
 France	34
 Germany	43
 Hungary	4
 Italy	22
 Netherlands	9
 Poland	14
 Portugal	6
 Romania	3
 Slovakia	3
 Slovenia	1
 Spain	15
 Sweden	11
 United Kingdom	34

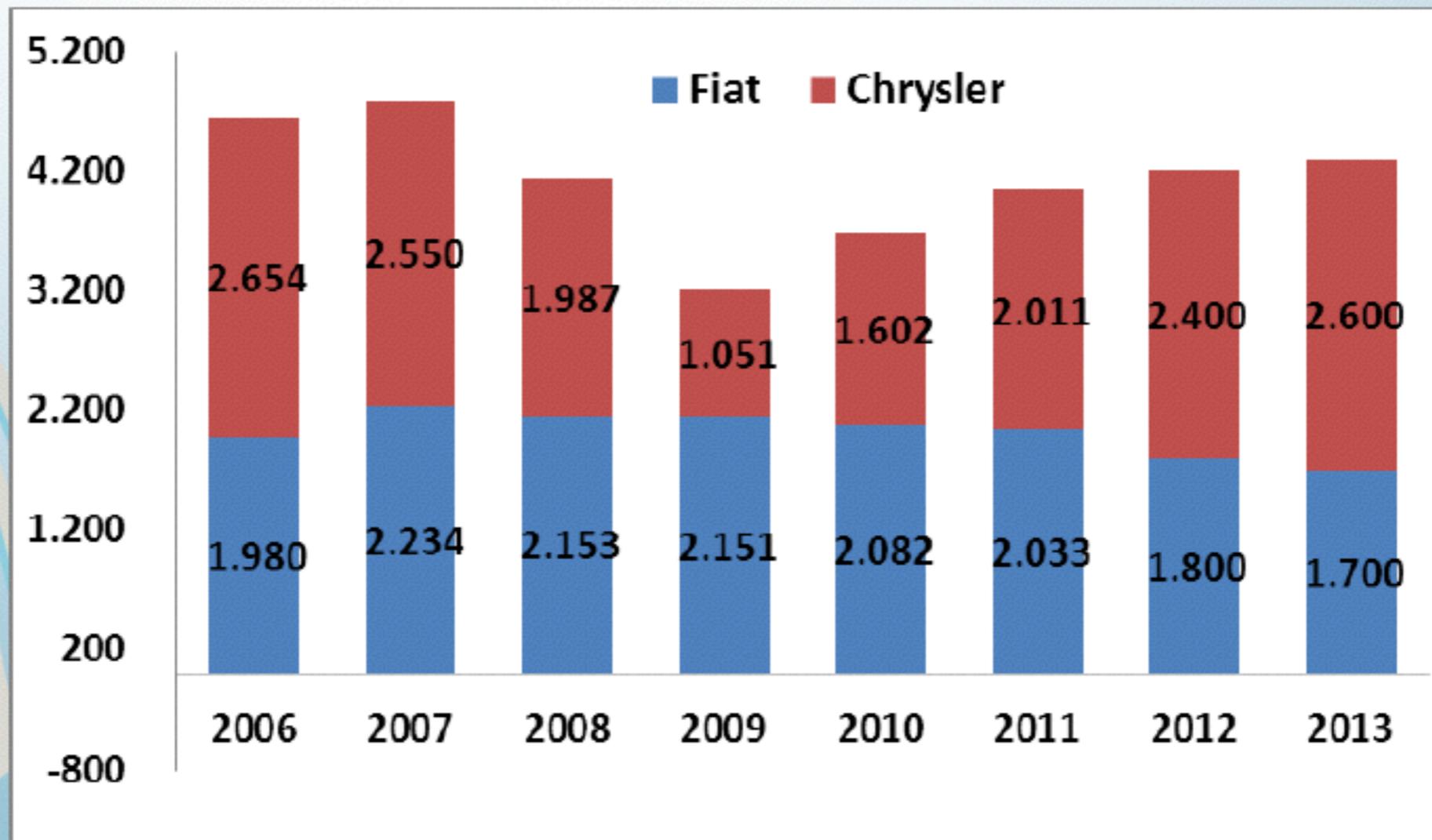
NON - EU	Plants
 Belarus	2
 Kazakhstan	4
 Russia	34
 Serbia	3
 Turkey	15
 Ukraine	7
 Uzbekistan	2

ALL MANUFACTURERS	Countries	Plants
Total Europe	26	293
 TOTAL EU	19	226

ACEA MEMBERS	Countries	Plants
Total Europe	22	190
 TOTAL EU	16	166

La **Fiat** è sempre più un gruppo internazionale: l'Italia dev'essere in grado di intercettare gli investimenti anche per i mercati esteri

Andamento delle vendite del Gruppo Fiat per marchi principali
2006 – 2013 (Fiat)

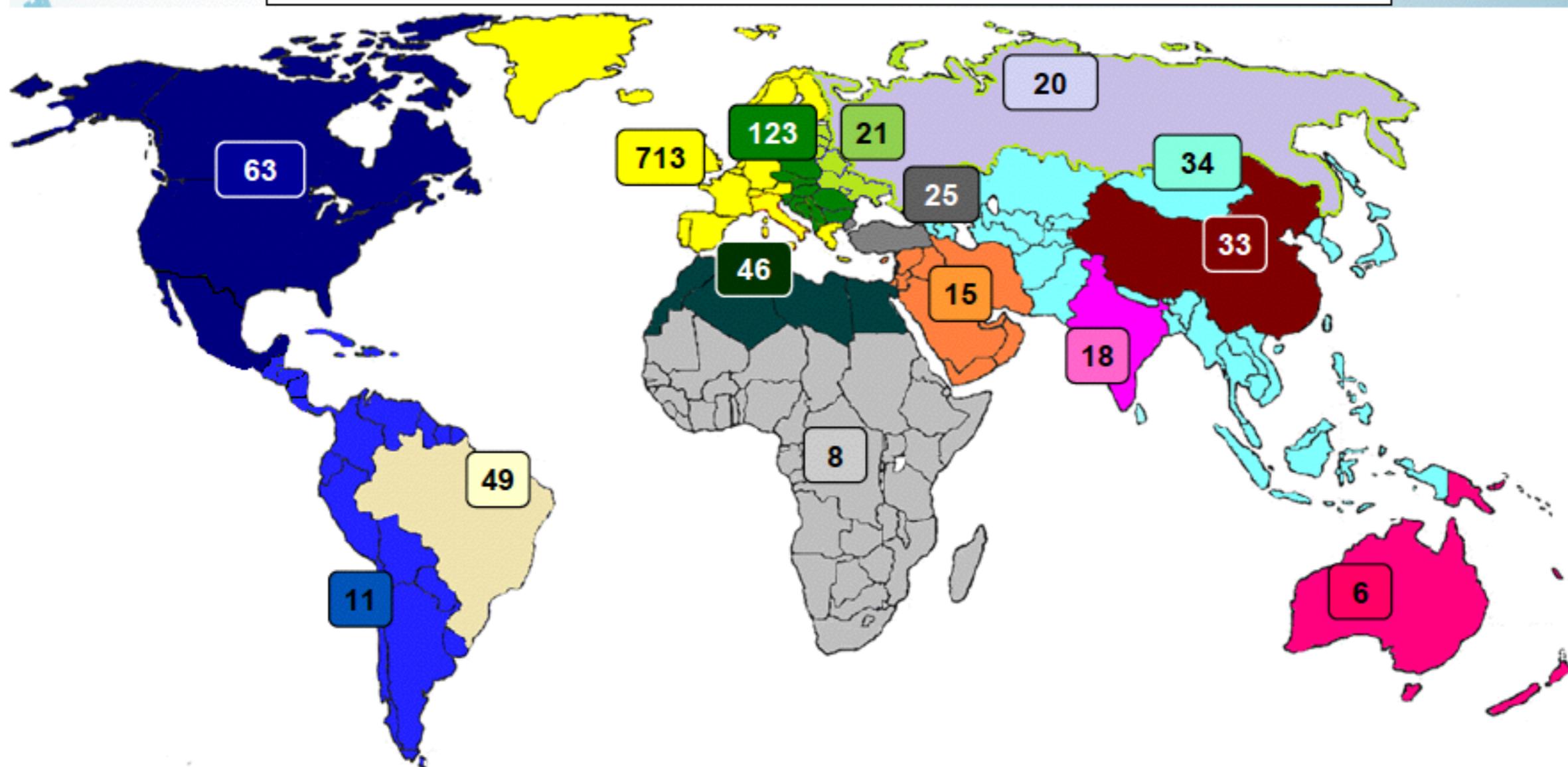


I mercati extra-Europei triplicano la loro importanza. Cresce l'interesse verso l'Area del Mediterraneo

I primi tre mercati per importanza delle commesse nel 2012-2013

558 imprese ne denunciano almeno 1

(I numeri della legenda si riferiscono al numero di mercati – fra i primi tre – attivi per area-paese)



Aumenta l'apertura di stabilimenti e si allarga il fronte produttivo ai confini dell'Unione Europea. Aumentano anche le chiusure

Gli stabilimenti aperti all'estero dal 2011 al 2013
(39 stabilimenti aperti, 7 chiusi)

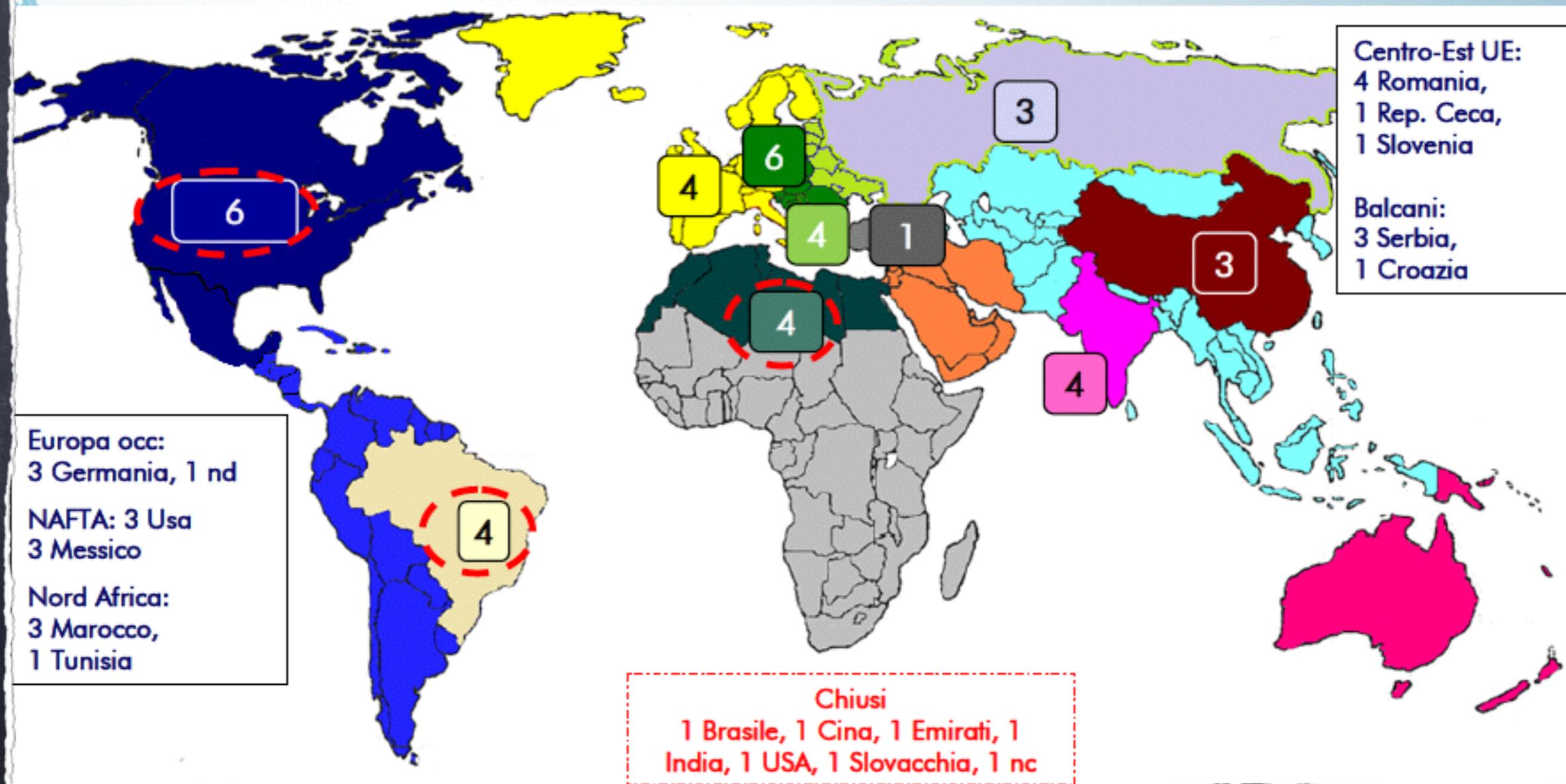
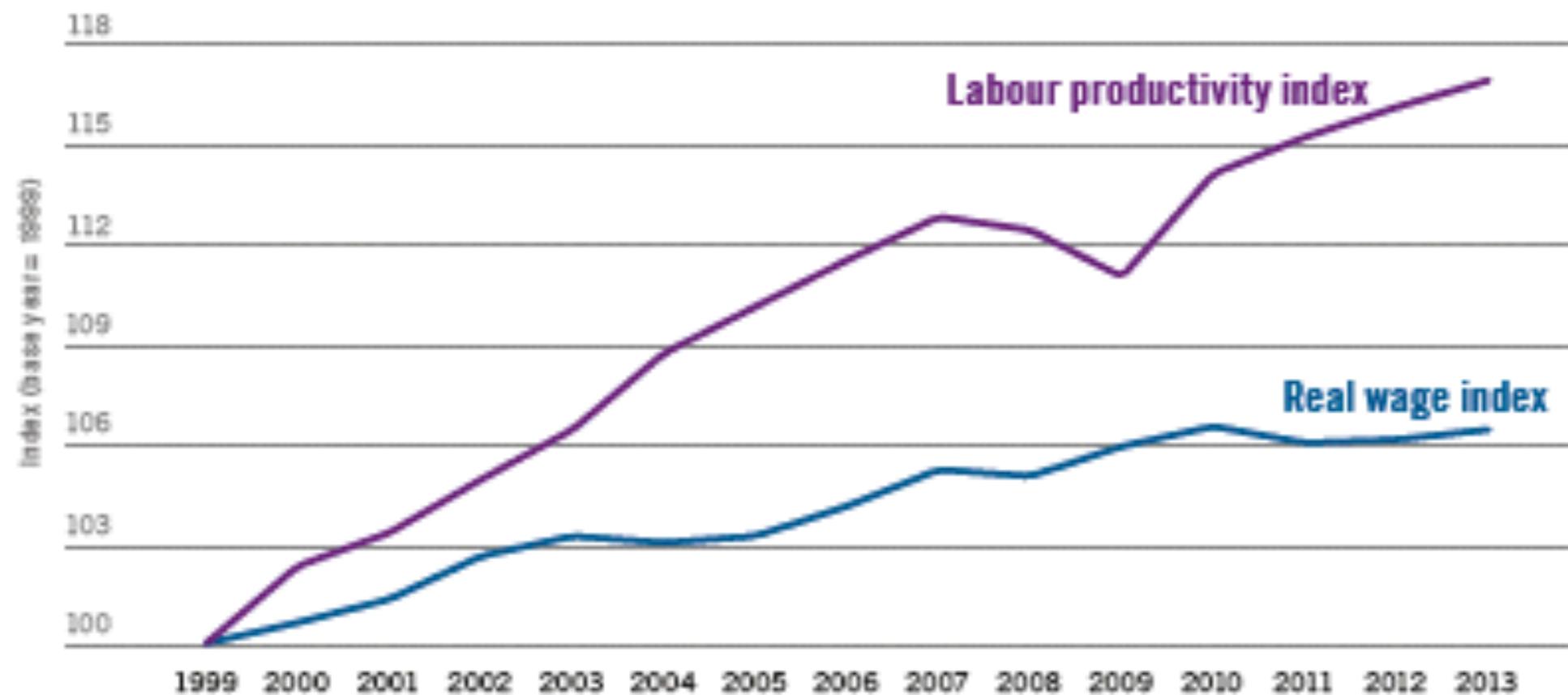


Figure 7 Trends in growth in average wages and labour productivity in developed economies (index), 1999–2013



Note: Wage growth is calculated as a weighted average of year-on-year growth in average monthly real wages in 36 economies (for a description of the methodology, see Appendix I). Index is based to 1999 because of data availability.

Sources: ILO Global Wage Database; ILO *Trends Econometric Models*, Apr. 2014. Data accessible at: www.ilo.org/gwr-figures

Prodotto annuo e numero di addetti nell'industria automobilistica in Cina 1990-2006)

