Press Release

THE ITALIAN CAR MARKET RETURNS TO GROWTH IN APRIL: +6,5%

A positive sign helped by calendar effects which enabled a positive closure for the first four months of the year (+0.2%)

Turin, 2nd May 2018 – According to data published today by the Ministry of Infrastructure and Transport, in April the Italian car market recorded 171,379 registrations representing an increase of 6.5% compared to the same month in 2017.

Sales volumes registered in the first four months of 2018 therefore totalled 745,945 units, 0.2% more than in the same period of 2017.

"*After the downturns of February and March, the car market returned to positive levels in April (+6.5%), helped in part by the effects of the calendar, given that one more working day was counted in April 2018 compared to April 2017. This allowed a positive closure also for the first four months of the year.* – stated **Aurelio Nervo, President of ANFIA**.

"Looking at the economic situation of recent months, according to ISTAT estimates for the first quarter of 2018 - which had three more working days in comparison to the previous quarter, and the same number of working days as in the first quarter of 2017 - GDP rose by 0.3% compared to the previous quarter and by 1.4% on a trend basis. During the same period, employment was estimated to have risen by 0.1% compared with the previous quarter and by 0.8% on an annual basis.

We would like to point out," Mr Nervo added, "that regarding the issue at the heart of this debate, namely the regulation of vehicle access in urban centres, on 25th April a workshop was held in Brussels in which ACEA (European Association of Motor Vehicle Manufacturers), POLIS (Network of European Cities and Regions committed to innovation in transport) and EUCAR (European Council for Automotive Research and Development) called on the European Commission to continue to support dialogue between all the stakeholders involved, following the publication of a study on the non-binding guidelines on the subject. It is important, in fact, that the planning, monitoring, evaluation and strengthening of measures of this type be coordinated more at European level rather than at national level".

The Italian car market is, by volume the fourth largest in the EU28, after Germany, the UK and France, but the largest for diesel car sales, albeit slightly down since February 2018.

Analysing the **registrations by power supply**[1], in April all fuel types grew, with the exception of diesel, which fell by 4% and represented 52.6% of the market in the month. **Diesel cars have not had such a low market share since December 2014**, when their

[1] Provisional Data

market share reached 52.2%. In the period from January to April the market for diesel cars fell by 2.8% with a share of 54.5%. Petrol cars grew by 16% in April and reached 34.4% which was the highest in the last 24 months. Since the beginning of the year petrol cars have been just above 2017 levels (+0.8%). Hybrid cars grew by 53% in the month whilst electric cars doubled compared to April 2017. Together, hybrids and electric cars account for 4.3% of the April car market (4% from the beginning of the year). LPG-powered cars increased by 10% compared to April 2017 but dropped by 4% overall so far this year. Cars powered by natural gas grew more than double (+107%) and obtained 2.4% market share (compared to 1.2% in April 2017); year to date, bi fuel cars powered by natural gas have grown by 44%. **In April 2017, alternative-fuelled cars collectively took 13% of the market thanks to their 34.4% increase in sales.** In the first four months of the year car registrations with alternative fuels grew by 14.4% and held a 12.1% share of the market.

In terms of **market segment**, in April Fiat Panda and Fiat 500 accounted for 50% of the super-utility segment and were the two best-selling models in this sector. Fiat Tipo was the top-selling model in the small-medium segment and together with the Alfa Romeo Giulietta accounted for 29% of the segment's share.
Fiat 500X and Jeep Renegade were the two best-selling small SUVs, accounting for 45% of this sector while the Jeep Compass was the best-selling compact SUV (the third most popular SUV ever) and the Alfa Romeo Stelvio was the best-selling medium sized SUV. The FCA range accounted for 22% of the total SUV market.
Fiat 500L was the most popular MPV and represented one third of all MPVs (46% if we only count the small MPVs of which it is part).

According to the ISTAT survey, the **consumer confidence index** (base 2010=100) fell from 117.5 to 117.1 in April. The **composite business confidence index** (Iesi) also deteriorated from 105.9 to 105.1.
In addition, with reference to consumer confidence regarding the purchase of durable goods of which the automobile is one, the result relating to the current situation is down (from -42.7 to -48.5).

According to preliminary ISTAT estimates the **national consumer price index** in April increased by 0.1% based on the month and by 0.5% based on the year (+0.8% in March). The slowdown in inflation, which was partly dampened by the increase in fuel prices, was mainly due to the reversal of the trend in the prices of regulated energy goods (from +5,0% to -1,1%) and in transport services (from +2,5% to -0,7%) to which should be added the less noticeable increase in the prices of communications services.

In the unregulated energy goods segment, which includes fuels there was a 1.1% increase in the economy.

Overall, **Italian brands** accounted for 46,320 registrations (-2%) in the month with a market share of 27%. In the first four months of 2018 total registrations amounted to 205,817 units (-6.8%) with a market share of 27.6%.

FCA brands (excluding Ferrari and Maserati) together totalled 45,976 registrations in the month (-2.1%), with a market share of 26.8%. Alfa Romeo (+11%) and Jeep (+124.5%) posted positive results. Ferrari (+85.7%) and Lamborghini (+26.7%) also performed well.

In the period from January to April, FCA's brands totalled 204,276 registered cars with a drop of 6.9% and a market share of 27.4%. Alfa Romeo (+18.5%) and Jeep (+95.1%) registered positive results, alongside Lamborghini (+11.5%).

Seven Italian models were in the **top ten of sales** in April, with the Fiat Panda still at the top of the standings (8,716 units), followed, in third place by the Fiat 500X (4,507) and in fourth place by Lancia Ypsilon (4,387), which gained two places. In fifth place we find Fiat 500 (4.334), then in sixth place the Fiat Tipo (4.053) and seventh place the Jeep Renegade (4.044). The Fiat 500L closes the top ten (3,678).

The **used car market** totalled 358,022 transfers of ownership including quick turnaround sales to dealers in April 2018 with an increase of 1.5% compared to April 2017. In the first four months of 2018 there were 1,543,486 transfers of ownership, 3.6% less than in the same period in 2017.

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Comunicato Stampa

ANFIA Associazione Nazionale Filiera Industria Automobilistica

ITALIA - IMMATRICOLAZIONI AUTOVETTURE

ITALY - NEW CAR REGISTRATIONS

dati provvisori/*provisional data*

	APRILE *APRIL*				VAR. % *% CHG.*	GENNAIO/APRILE *JANUARY/APRIL*				VAR. % *% CHG.*
MARCA/*MAKE*	**2018**	*%*	**2017**	*%*	*18/17*	**2018**	*%*	**2017**	*%*	*18/17*
FCA	45.976	*26,83*	46.983	*29,19*	*-2,14*	204.276	*27,38*	219.367	*29,48*	*-6,88*
FIAT	29.680	*17,32*	33.811	*21,00*	*-12,22*	136.925	*18,36*	160.726	*21,60*	*-14,81*
ALFA ROMEO	4.428	*2,58*	3.988	*2,48*	*11,03*	18.837	*2,53*	15.902	*2,14*	*18,46*
LANCIA/CHRYSLER	4.387	*2,56*	5.851	*3,63*	*-25,02*	18.090	*2,43*	27.142	*3,65*	*-33,35*
JEEP	7.481	*4,37*	3.333	*2,07*	*124,45*	30.424	*4,08*	15.597	*2,10*	*95,06*
FERRARI	39	*0,02*	21	*0,01*	*85,71*	131	*0,02*	131	*0,02*	*0,00*
MASERATI	200	*0,12*	221	*0,14*	*-9,50*	1.016	*0,14*	1.162	*0,16*	*-12,56*
LAMBORGHINI	19	*0,01*	15	*0,01*	*26,67*	58	*0,01*	52	*0,01*	*11,54*
ALTRE NAZIONALI	86	*0,05*	32	*0,02*	*168,75*	336	*0,05*	160	*0,02*	*110,00*
TOT. MARCHE NAZ.	**46.320**	*27,03*	**47.272**	*29,37*	*-2,01*	**205.817**	*27,59*	**220.872**	*29,68*	*-6,82*
AUDI	5.849	*3,41*	5.702	*3,54*	*2,58*	24.699	*3,31*	24.462	*3,29*	*0,97*
BMW	5.103	*2,98*	5.606	*3,48*	*-8,97*	21.920	*2,94*	23.094	*3,10*	*-5,08*
CITROEN	8.009	*4,67*	6.666	*4,14*	*20,15*	36.397	*4,88*	30.253	*4,07*	*20,31*
DACIA	4.300	*2,51*	4.912	*3,05*	*-12,46*	22.127	*2,97*	19.450	*2,61*	*13,76*
FORD	11.864	*6,92*	11.065	*6,87*	*7,22*	52.806	*7,08*	53.624	*7,21*	*-1,53*
HONDA	766	*0,45*	768	*0,48*	*-0,26*	3.575	*0,48*	4.011	*0,54*	*-10,87*
HYUNDAI	4.500	*2,63*	4.634	*2,88*	*-2,89*	18.472	*2,48*	19.699	*2,65*	*-6,23*
INFINITI	50	*0,03*	136	*0,08*	*-63,24*	264	*0,04*	879	*0,12*	*-69,97*
JAGUAR	857	*0,50*	351	*0,22*	*144,16*	3.479	*0,47*	2.076	*0,28*	*67,58*
KIA	5.228	*3,05*	3.578	*2,22*	*46,12*	17.971	*2,41*	17.469	*2,35*	*2,87*
LAND ROVER	1.461	*0,85*	1.513	*0,94*	*-3,44*	7.542	*1,01*	7.326	*0,98*	*2,95*
MAZDA	780	*0,46*	743	*0,46*	*4,98*	4.349	*0,58*	3.725	*0,50*	*16,75*
MERCEDES	4.924	*2,87*	5.270	*3,27*	*-6,57*	22.854	*3,06*	22.596	*3,04*	*1,14*
MINI	2.022	*1,18*	1.793	*1,11*	*12,77*	7.594	*1,02*	8.131	*1,09*	*-6,60*
MITSUBISHI	420	*0,25*	328	*0,20*	*28,05*	1.582	*0,21*	1.439	*0,19*	*9,94*
NISSAN	4.587	*2,68*	3.669	*2,28*	*25,02*	24.400	*3,27*	22.262	*2,99*	*9,60*
OPEL	8.168	*4,77*	7.999	*4,97*	*2,11*	36.361	*4,87*	39.581	*5,32*	*-8,14*
PEUGEOT	9.529	*5,56*	8.301	*5,16*	*14,79*	43.421	*5,82*	39.512	*5,31*	*9,89*
PORSCHE	314	*0,18*	450	*0,28*	*-30,22*	1.809	*0,24*	1.893	*0,25*	*-4,44*
RENAULT	12.291	*7,17*	12.215	*7,59*	*0,62*	45.648	*6,12*	49.196	*6,61*	*-7,21*
SEAT	2.063	*1,20*	1.377	*0,86*	*49,82*	8.390	*1,12*	6.379	*0,86*	*31,53*
SKODA	2.471	*1,44*	1.896	*1,18*	*30,33*	9.800	*1,31*	8.224	*1,11*	*19,16*
SMART	2.181	*1,27*	2.327	*1,45*	*-6,27*	8.605	*1,15*	10.545	*1,42*	*-18,40*
SSANGYONG	187	*0,11*	213	*0,13*	*-12,21*	861	*0,12*	878	*0,12*	*-1,94*
SUBARU	248	*0,14*	208	*0,13*	*19,23*	1.026	*0,14*	1.159	*0,16*	*-11,48*
SUZUKI	2.890	*1,69*	2.332	*1,45*	*23,93*	12.007	*1,61*	11.026	*1,48*	*8,90*
TOYOTA	7.641	*4,46*	6.768	*4,20*	*12,90*	32.508	*4,36*	31.978	*4,30*	*1,66*
LEXUS	203	*0,12*	145	*0,09*	*40,00*	1.266	*0,17*	1.109	*0,15*	*14,16*
VOLKSWAGEN	14.397	*8,40*	11.114	*6,90*	*29,54*	62.221	*8,34*	54.494	*7,32*	*14,18*
VOLVO	1.670	*0,97*	1.543	*0,96*	*8,23*	5.795	*0,78*	6.377	*0,86*	*-9,13*
ALTRE	86	*0,05*	75	*0,05*	*14,67*	379	*0,05*	412	*0,06*	*-8,01*
TOT.MARCHE EST.	**125.059**	*72,97*	**113.697**	*70,63*	*9,99*	**540.128**	*72,41*	**523.259**	*70,32*	*3,22*
TOT.MERCATO	**171.379**	*100,00*	**160.969**	*100,00*	*6,47*	**745.945**	*100,00*	**744.131**	*100,00*	*0,24*

Elaborazioni ANFIA su dati del Ministero dei Trasporti/*Prepared by ANFIA from the data of Ministry of Transportations (Aut. Min. D07161/H4)*

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 30/04/2018

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ITALIA - IMMATRICOLAZIONI AUTOVETTURE - Top ten

ITALY - NEW CAR REGISTRATIONS - Top ten

dati provvisori/*provisional data*

TOP 10

N.	MARCA *Make*	MODELLO *Model*	APRILE 2018 *APRIL 2018*
1	FIAT	PANDA	8.716
2	RENAULT	CLIO	4.756
3	FIAT	500X	4.507
4	LANCIA	YPSILON	4.387
5	FIAT	500[1] (Non comprende 500 Abarth)	4.334
6	FIAT	TIPO	4.053
7	JEEP	RENEGADE	4.044
8	VOLKSWAGEN	POLO	3.965
9	FORD	FIESTA	3.806
10	FIAT	500L	3.678

Fonte: CED - Ministero dei Trasporti

N.	MARCA *Make*	MODELLO *Model*	GEN/APR 2018 *JAN/APR 2018*
1	FIAT	PANDA	43.361
2	FIAT	500[2] (Comprende 500 Abarth)	21.602
3	FIAT	500X	21.322
4	FIAT	TIPO	20.059
5	FORD	FIESTA	18.602
6	LANCIA	YPSILON	18.092
7	CITROEN	C3	17.602
8	RENAULT	CLIO	17.387
9	VOLKSWAGEN	GOLF	16.248
10	VOLKSWAGEN	POLO	16.214

Fonte: Elaborazioni ANFIA su dati del Ministero dei Trasporti (Aut. Min. D07161/H4)

1 - **Non comprende le Abarth 500, con le quali Fiat 500 passerebbe dal 5° posto al 3° posto della top ten di aprile**

2 - Comprende le Abarth 500

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