Press Release

THE ITALIAN CAR MARKET CLOSES 2018 WITH A NEGATIVE SIGN (-3.1%), THIS YEAR HAS BEEN CHARACTERIZED BY A SEESAWING TREND

After three months of slowdown, it has been a positive December (+2%), but the new year opens with the negative consequences of the bonus-malus law, with an economic uncertain climate and with a critical productive contest

Turin, January 2nd 2019 – According to the data published today by the Minister of Infrastructures and Transport, in December, the Italian car market totalized 124,078 registrations, in increasement of 2% respect to the same month of 2017.

The volumes registered in 2018 reached 1,910,025 units, the 3.1% (about 60,000 cars) less respect to 2017.

"In December, the Italian car market, after the slowdown of the three past months, back to grow (+2%), also thanks to a working day more respect the same month in 2017, while it closes 2018 with a negative sign (-3.1%) - says **Paolo Scudieri, President of ANFIA.**

The growth of December and the slowdown of the closing of the year (because of the decreases of September, October and November) are given by the new standards for the measuring of emissions, which are effective since last September 1st, and by their duty to register only vehicles which have an Euro 6C and 6D temp. The growth of registrations in July and August over the average brought to a balance for the following month, while in the last three months the situation, even if keeping few negative data, started to improve.

More in general 2018, saw a seesawing trend for the market: 7 months on 12 close negatively. In the first part of the year what affects the most on it have been firstly the instability of politics and the pre-elections climate and then the progressive slowing down of diesel cars, following what was happening in the other main European markets. In the last part, instead, beyond what already said above, also affect the worsening of index of the company and also the consumer confidence climate, the slowing down of the ESI (Economic Sentiment Indicator) and the politics tension linked to the financial plan.

It is not easy to predict what could happen during this new year, which opened with the negative consequences of the bonus-malus law, it will not affect only luxury or more powerful engine cars, but also many models spread on the market - and with an economic uncertain climate and for a critical productive contest (the index of the

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Automotive production is decreasing since last July and the orders since last August). A big step on the way to a mobility with zero impact has been done with an assignment in support of the recharge areas already included in the Budget law.

In the end – says the President – *there have not been the usual motorway toll increasements of the beginning of the year, differently respect to the previous years, on almost the 90% of the Italian highways, but it stays an unstable matter for companies, since there has not been an agreement. This stop should last for six months".*

Analyzing **registrations by fuelling**[1], in December 2018 grow petrol, hybrid and electric cars registrations, while decrease diesel, LPG and natural gas ones.
Diesel cars keep to decrease, -17% during December, with a share of 45.9%. In 2018, this decreasement stopped at -12% and the market share is of 51.2%. Petrol cars grow, instead, registrations during the month increase of 41% and during the year of 8%. The market share reached 42% during the month and 35.5% during the year.
Alternative powered cars represent the 12.1% of the December's market and the 13.3% in the overall of 2018, in slow down of 4.8% during the month and in increseament of 10% in 2018.
LPG cars decrease, both in December (-4%), and in the overall of 2018 (-3.5%), with a market share of 6.1% during the month and of 6.5% during the year.
Natural gas cars, strongly slowdown in December (-50%), but keeping a positive trend during 2018, of 14%. The market share is about 1,1% during December and of 2% in 2018.
Zero emissions cars keep to grow: registrations of electric cars grow of 88% in December, with a market about 370 units, and of 147% during the year, with a share of almost 5,000 units. The market share of these cars is of 0.3%, both in December and in 2018.
In the end, hybrid cars (plug-in ones included) see their own market grow of 16.5% in December and of 30.5% in 2018. Their market share during December is of 4.6% and in 2018 of 4.5%.

Referring to the **market by segments**, during December and in the overall of 2018, Fiat Panda and Fiat 500 have been the best sold cars in the segment of the super economy cars. Together the two models, own a market share of 55% in December and during the whole 2018. Lancia Ypsilon is the best sold car in December in the segment of the economy cars, while Fiat Tipo is the best sold car in the segment C.
Both in December and during the year, Jeep Renegade and Fiat 500X have been the two best sold (Renegade during the month, 500X during 2018), while Jeep Compass has been the best sold among compacted SUVs and Alfa Romeo Stelvio among medium SUVs. The FCA group models represent the 21% of the market of all SUVs, both during the month and during the year. During 2018, the best sold monovolume is Fiat 500L.

[1] Temporary Data.

According to the ISTAT survey in December, the **consumer confidence climate index** (basis 2010=100) decrease from 114.7 to 113.1. Also The composite **index of the company confidence climate** (Iesi) registers a negative dynamics, already active since the last July, going from 101.0 a 99. 8.

Referring to the consumer confidence climate, regarding the purchase of the long lasting goods and among them there is the car, the balance regarding the current opportunity is slowing down respect to November (from -42.3 to -50.3).

According to the last ISTAT data available, in November the **national index of consumer prices** registers a slowdown of 0.2% per month and a growth of 1.6% per year (stable respect to October). This stability of the inflation is given by opposite dynamics which balanced: from one side, the slightly increasement of the prices of several products: (among them: not regulated foodstuff, regulated foodstuff, cultural and bodycare services and not regulated energetic goods related to Transportation from +1.8% to +2.0%) from the other, the slowdown of the prices of the not regulated energetic goods (from +9.5% to +7.8%), which still grow anyway, together with the regulated ones (stable with +10.7%), contribute for almost the half of the wide of inflation and it highlights the slowdown of the long lasting goods.

National brands, in the overall, totalized during the month 31,989 registrations (-0.6%), with a market share of 25.8%. During the whole 2018, the overall of registrations reached 504,473 units (-10.1%), with a market share of 26.4%.

FCA brands (excluding Ferrari and Maserati) totalized in the overall 31,648 registrations during the month (-1.1%), with a market share of 25.5%. Positive trend for Lancia/Chrysler (+38.6%) and Jeep (+60.3%). Also positive Ferrari (+112.5%) and Lamborghini (+20%).

During the twelve months, FCA brands totalized 499,546 registered cars, with a slowdown of 10.4% and a market share of 26.1%. Close positively also the period which went from January to December, Jeep (+70.7%), together with Ferrari (+16%) and Lamborghini (+59.4%).

The Italian models in the **top ten of the best sold**, are five, with Fiat Panda (10,418 units) always at the first place, followed at the second by Lancia Ypsilon (4,355) and at the third place by Jeep Renegade (3,458), which stay stable. At the sixth place there is Jeep Compass (2,910), followed at the seventh by Fiat 500X (2,883).

The **2018 top ten** see six Italian models: Fiat Panda keeps the first place (122,475 units), followed by Fiat 500X (49,930), Lancia Ypsilon (48,560) and by Fiat 500 (44,146)

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respectively at the second, fourth and at the fifth place. At the sixth place there is Jeep Renegade (41,942) and at the ninth Fiat Tipo (40,332).

The **second-hand market** totalized 337,269 ownerships transfers, including the mini-transfer operations to car dealers, during December 2018, registering a slowdown of 5.2% respect to December 2017. In 2018, ownerships transfers have been 4,426,268, the 3.3% less respect 2017.

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ANFIA – Italian Association of the Automotive Industry – is one of the leading Italian Trade Associations, members of CONFINDUSTRIA.
Born in March 1912, over these one hundred years, ANFIA mission has always been to represent the interests of its associate members and ensure effective communication between the Italian motor vehicle industries on the one hand, and the Public Administration and Italian political bodies on the other, with regard to all technical, economic, fiscal, legal, statistical and quality-related issues referred to the automotive sector. The Association is structured in three product-based Groups, each one chaired by a President.
Components: motor vehicle parts and components manufacturers; Car Coachbuilders and Designers: companies working in the sector of design, engineering and style of motor vehicles and/or parts and components for the automotive sector; Motor vehicles: motor vehicles manufacturers in general, including trucks, trailers, camper vans, special means of transport.

Comunicato Stampa

ITALIA - IMMATRICOLAZIONI AUTOVETTURE

ITALY - NEW CAR REGISTRATIONS

dati provvisori/*provisional data*

	DICEMBRE *DECEMBER*				VAR. % *% CHG.*	GENNAIO/DICEMBRE *JANUARY/DECEMBER*				VAR. % *% CHG.*
MARCA/*MAKE*	**2018**	*%*	**2017**	*%*	*18/17*	**2018**	*%*	**2017**	*%*	*18/17*
FCA	31.648	*25,51*	32.001	*26,30*	*-1,10*	499.546	*26,15*	557.607	*28,29*	*-10,41*
FIAT	18.710	*15,08*	21.829	*17,94*	*-14,29*	323.342	*16,93*	402.430	*20,41*	*-19,65*
ALFA ROMEO	1.919	*1,55*	2.874	*2,36*	*-33,23*	43.112	*2,26*	45.333	*2,30*	*-4,90*
LANCIA/CHRYSLER	4.355	*3,51*	3.141	*2,58*	*38,65*	48.557	*2,54*	60.336	*3,06*	*-19,52*
JEEP	6.664	*5,37*	4.157	*3,42*	*60,31*	84.535	*4,43*	49.508	*2,51*	*70,75*
FERRARI	17	*0,01*	8	*0,01*	*112,50*	399	*0,02*	344	*0,02*	*15,99*
MASERATI	141	*0,11*	151	*0,12*	*-6,62*	2.762	*0,14*	2.918	*0,15*	*-5,35*
LAMBORGHINI	12	*0,01*	10	*0,01*	*20,00*	212	*0,01*	133	*0,01*	*59,40*
ALTRE NAZIONALI	171	*0,14*	25	*0,02*	*584,00*	1.554	*0,08*	437	*0,02*	*255,61*
TOT. MARCHE NAZ.	**31.989**	*25,78*	**32.195**	*26,46*	*-0,64*	**504.473**	*26,41*	**561.439**	*28,48*	*-10,15*
AUDI	4.743	*3,82*	3.080	*2,53*	*53,99*	62.776	*3,29*	67.103	*3,40*	*-6,45*
BMW	3.546	*2,86*	4.445	*3,65*	*-20,22*	57.121	*2,99*	60.894	*3,09*	*-6,20*
CITROEN	5.471	*4,41*	5.099	*4,19*	*7,30*	85.509	*4,48*	80.879	*4,10*	*5,72*
DACIA	5.426	*4,37*	4.152	*3,41*	*30,68*	61.599	*3,23*	58.011	*2,94*	*6,19*
FORD	7.514	*6,06*	8.006	*6,58*	*-6,15*	129.563	*6,78*	134.124	*6,80*	*-3,40*
HONDA	525	*0,42*	668	*0,55*	*-21,41*	8.859	*0,46*	9.875	*0,50*	*-10,29*
HYUNDAI	3.424	*2,76*	4.652	*3,82*	*-26,40*	53.445	*2,80*	58.934	*2,99*	*-9,31*
INFINITI	66	*0,05*	43	*0,04*	*53,49*	600	*0,03*	1.853	*0,09*	*-67,62*
JAGUAR	546	*0,44*	313	*0,26*	*74,44*	9.257	*0,48*	5.316	*0,27*	*74,13*
KIA	2.635	*2,12*	3.475	*2,86*	*-24,17*	47.730	*2,50*	47.957	*2,43*	*-0,47*
LAND ROVER	1.002	*0,81*	1.019	*0,84*	*-1,67*	17.356	*0,91*	18.676	*0,95*	*-7,07*
MAZDA	700	*0,56*	765	*0,63*	*-8,50*	10.866	*0,57*	10.530	*0,53*	*3,19*
MERCEDES	4.371	*3,52*	4.583	*3,77*	*-4,63*	61.318	*3,21*	65.971	*3,35*	*-7,05*
MINI	1.075	*0,87*	1.825	*1,50*	*-41,10*	20.529	*1,07*	24.724	*1,25*	*-16,97*
MITSUBISHI	564	*0,45*	272	*0,22*	*107,35*	6.008	*0,31*	3.755	*0,19*	*60,00*
NISSAN	2.947	*2,38*	4.159	*3,42*	*-29,14*	54.606	*2,86*	62.724	*3,18*	*-12,94*
OPEL	5.504	*4,44*	3.776	*3,10*	*45,76*	95.290	*4,99*	98.979	*5,02*	*-3,73*
PEUGEOT	7.221	*5,82*	7.133	*5,86*	*1,23*	108.468	*5,68*	104.274	*5,29*	*4,02*
PORSCHE	424	*0,34*	367	*0,30*	*15,53*	5.290	*0,28*	5.492	*0,28*	*-3,68*
RENAULT	8.910	*7,18*	8.567	*7,04*	*4,00*	125.154	*6,55*	133.715	*6,78*	*-6,40*
SEAT	1.071	*0,86*	1.254	*1,03*	*-14,59*	19.951	*1,04*	17.528	*0,89*	*13,82*
SKODA	1.679	*1,35*	1.522	*1,25*	*10,32*	25.377	*1,33*	23.129	*1,17*	*9,72*
SMART	1.379	*1,11*	1.549	*1,27*	*-10,97*	24.620	*1,29*	26.665	*1,35*	*-7,67*
SSANGYONG	146	*0,12*	145	*0,12*	*0,69*	2.465	*0,13*	2.244	*0,11*	*9,85*
SUBARU	204	*0,16*	320	*0,26*	*-36,25*	3.387	*0,18*	3.085	*0,16*	*9,79*
SUZUKI	2.435	*1,96*	1.994	*1,64*	*22,12*	32.939	*1,72*	31.093	*1,58*	*5,94*
TOYOTA	4.900	*3,95*	5.040	*4,14*	*-2,78*	87.833	*4,60*	85.245	*4,32*	*3,04*
LEXUS	531	*0,43*	528	*0,43*	*0,57*	3.974	*0,21*	4.003	*0,20*	*-0,72*
VOLKSWAGEN	11.424	*9,21*	9.323	*7,66*	*22,54*	162.775	*8,52*	144.885	*7,35*	*12,35*
VOLVO	1.540	*1,24*	1.291	*1,06*	*19,29*	19.075	*1,00*	16.970	*0,86*	*12,40*
ALTRE	166	*0,13*	129	*0,11*	*28,68*	1.812	*0,09*	1.273	*0,06*	*42,34*
TOT.MARCHE EST.	**92.089**	*74,22*	**89.494**	*73,54*	*2,90*	**1.405.552**	*73,59*	**1.409.906**	*71,52*	*-0,31*
TOT.MERCATO	**124.078**	*100,00*	**121.689**	*100,00*	*1,96*	**1.910.025**	*100,00*	**1.971.345**	*100,00*	*-3,11*

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 31/12/2018

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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*	DICEMBRE[1] 2018 *DECEMBER 2018*
1	FIAT	PANDA	10.418
2	LANCIA	YPSILON	4.355
3	JEEP	RENEGADE	3.458
4	VOLKSWAGEN	POLO	3.321
5	RENAULT	CLIO	3.069
6	JEEP	COMPASS	2.910
7	FIAT	500X	2.883
8	RENAULT	CAPTUR	2.697
9	CITROEN	C3	2.648
10	DACIA	SANDERO	2.551

Fonte: CED - Ministero dei Trasporti

N.	MARCA *Make*	MODELLO *Model*	GEN/DIC 2018 *JAN/DEC 2018*
1	FIAT	PANDA	122.475
2	FIAT	500X	49.930
3	RENAULT	CLIO	49.348
4	LANCIA	YPSILON	48.560
5	FIAT	500[1] (Comprende 500 Abarth)	44.146
6	JEEP	RENEGADE	41.942
7	VOLKSWAGEN	POLO	41.089
8	CITROEN	C3	40.752
9	FIAT	TIPO	40.332
10	FORD	FIESTA	39.808

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

1 - Comprende le Abarth 500

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