

Press Release

THE ITALIAN CAR MARKET CLOSED THE FIRST HALF OF THE YEAR AT -1.5%.

There was a sharp decline in diesel cars in June (-17%), otherwise the market would have grown by 6%

Turin, 2nd July 2018 - According to data published today by the Ministry of Infrastructure and Transport the Italian car market amounted to 174,702 registrations in June compared to the same month in 2017 and was down 7.3%.

Volumes registered in the first half of 2018 therefore totalled 1,120,829 units, 1.5% less than the volumes registered in the same period of 2017.

“The slowdown in the car market continued in June 2018 (-7.3%), with the decline in the first half of the year contained at -1.5% - commented Gianmarco Giorda, Director of ANFIA.

“The negative trend in the car market was due, in particular as a result of the sharp decline in diesel cars, which in June 2018 suffered a 17% drop compared to June 2017 (the biggest monthly decline since December 2017, the month that recorded its first decline in sales of diesel cars), while in the first 6 months of the year saw a 6% decline. The market without diesel cars grew by 6% in June 2018 and 5% in the first half of the year. The market share of diesel cars in June 2018 was 52.6%, while in June 2017 it was exactly 6 percentage points higher.

Alternative-fuelled cars, on the other hand for the month represented 14.2% of the market share, the highest since January 2015, when it stood at 15.8%. This segment grew by 13.5% in June and 15% over the year to date.

To meet the objectives of reducing environmental impact of mobility we believe that it is necessary to somehow stimulate demand within the private sector. In this way, we can facilitate the renewal of vehicles in circulation, an indispensable and often underestimated factor in order to achieve truly sustainable mobility”.

Continuing with the analysis of **registrations for fuel types**¹, the market for petrol powered cars grew, which in June represented 33.2% of the total market and recorded a growth of 3.5%, whereas cumulative sales grew by 2%.

Of the alternatively fuelled cars, only the LPG car sector showed a decline, with a negative trend of 9% in the month and 5% cumulative.

The strong growth of natural gas cars continued and in June 2018 they registered an 84% increase compared to June 2017, thus taking the increase in the first half of 2018 to

¹ Provisional data

61%. Electric cars, although with a market share of just 0.3% are those that recorded the best performance, both in the month (+124.5%) and in cumulatively (+125%).

Finally, cars with hybrid engines grew by 25% in June and by 31% in the first half of 2018.

In terms of **market segment**, in June 2018 Fiat Panda and Fiat 500 were ranked first and second in the super-utility segment respectively with almost 50% of the market share.

Fiat Tipo, on the other hand topped the list of small -medium cars and on its own represented almost one fifth of total June sales in this segment.

Fiat 500X, Jeep Renegade (small SUVs) and Jeep Compass (compact SUVs) were the three best-selling SUVs in this order, while Alfa Romeo Stelvio was the best-selling of the Medi SUVs. FCA Group SUVs accounted for 22% of the entire SUV market which was the best performing segment in the first half of 2018.

Finally, the Fiat 500L was the best-selling MPV and accounted for a quarter of the entire MPV market.

According to the ISTAT survey, in June the **consumer confidence climate index** (base 2010=100) rose from 113.9 to 116.2. The **composite business confidence index** (Iesi) also rose from 104.6 to 105.4.

Furthermore, with reference to consumer confidence regarding the purchase of durable goods which includes the car, the balance relating to current opportunities has improved (from -50 to -43.4).

According to preliminary ISTAT estimates, in June the **national consumer price index** recorded an increase of 0.3% in the month and of 1.4% over the year (an increase compared to +1.0% in May). The rise in inflation was mainly due to the prices of unregulated energy goods (from +5.3% in May to +9.4%), of processed and unprocessed foods and to the prices of transportation services (from +1.7% to +2.9%).

The prices of unregulated energy goods showed a change of +2.3% compared to the previous month and equal to +9.4% from the same month in 2017 (+5.3% in May). This trend was due to the increase in the prices of all the main components of this type of product: **Diesel** (+3.0% on a cyclical basis, +12.6% on an annual basis, rising from +7.2% in May), **Petrol** (+2.5% in cyclical terms and +9.7% in trend terms, from +5.2% in the previous month), **LPG** (+1.9% on a monthly basis and +7.8% compared to June 2017), **other fuels** (+1.5% and +5.9% respectively).

Overall, **Italian brands** accounted for 43,795 registrations (-19%) in the month with a market share of 25.1%. In the first half of 2018 total registrations stood at 305,278 units (-9%) with a market share of 27.2%.

FCA brands (excluding Ferrari and Maserati) together totalled 43,343 registrations in the month (-19.3%), with a market share of 24.8%. There was nevertheless a positive trend

for Jeep (+91.7%). Ferrari (+50%) and Maserati (+2.1%) also performed well. Double-digit growth was also reported by Lamborghini (+40%).

In the period from January to June, FCA's brands totalled 302,847 registered cars with a drop of 9.1% and a market share of 27%. The half-year ended positively with Alfa Romeo (+8.1%) and Jeep (+100.8%), alongside Ferrari (+12%) and Lamborghini (+13.2%).

In June, there were six Italian models in the **top ten sales** with Fiat Panda remaining at the top of the ranking (9,370 units), followed in second place by Fiat 500X (5,043), which climbed seven positions. In fourth place was Lancia Ypsilon (3,994). Jeep Renegade (3,927) came fifth, followed in seventh by Fiat Tipo (3,784) which gained one position while Jeep Compass (3,588) came in eighth.

The **used car market** totalled 360,298 transfers of ownership including quick turnaround sales to dealers in June 2018, which is a drop of 4.1% compared to June 2017. In the first six months of 2018 transfers of ownership totalled 2,307,771, representing a 3.4% decrease over the same period in 2017.

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ANFIA (New website: www.anfia.it)

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.

ITALIA - IMMATRICOLAZIONI AUTOVETTURE

ITALY - NEW CAR REGISTRATIONS

dati provvisori/provisional data

| MARCA/MAKE | APRILE APRIL | | | | VAR. % % CHG. 18/17 | GENNAIO/APRILE JANUARY/APRIL | | | | VAR. % % CHG. 18/17 |
|------------------|-----------------|--------|---------|--------|---------------------------|---------------------------------|--------|---------|--------|---------------------------|
| | 2018 | % | 2017 | % | | 2018 | % | 2017 | % | |
| 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

Associazione Nazionale Filiera Industria Automobilistica

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ITALIA - IMMATRICOLAZIONI AUTOVETTURE - Top ten

ITALY - NEW CAR REGISTRATIONS - Top ten

dati provvisori/provisional data

TOP 10

| N. | MARCA <i>Make</i> | MODELLO <i>Model</i> | APRILE 2018 <i>APRIL 2018</i> |
|----|----------------------|---|----------------------------------|
| 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 <i>Make</i> | MODELLO <i>Model</i> | GEN/APR 2018 <i>JAN/APR 2018</i> |
|----|----------------------|---|-------------------------------------|
| 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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