Press Release

POSITIVE SIGNS ARE BACK IN JULY FOR THE ITALIAN CAR MARKET (+4.4%)

Diesel car registrations were still down, albeit to a lesser extent than in previous months (-5%), and their market share (50.8%) was 5 percentage points lower than in July 2017

Turin, 1st August 2018 – According to data published today by the Ministry of Infrastructure and Transport, in July the Italian car market totalled 152,393 registrations with an increase of 4.4% compared to the same month in 2017.

Volumes registered in the first seven months of 2018 thus amounted to 1,273,730 units, a decrease of 0.7% compared to the same period of 2017.

"In July 2018 the market again showed positive signs after the slowdowns in May (-2.6%) and June (-7.3%), which led to a slight decline in the first half of the year (-1.5%) - commented **Gianmarco Giorda, Director of ANFIA**.

"Calendar impacts also affected the month's higher balance, with July 2018 having one more working day than the same month last year (22 days versus 21).

Although to a lesser extent than in previous months, when it recorded double-digit contraction, the decline in diesel car registrations continued. These were down 5% in the month with a market share of 50.8%, exactly 5 percentage points less than in July 2017 and 8 percentage points less than in July 2016.

Alternative fuelled cars, on the other hand were up 29% in July and 17% cumulatively - stated Mr Giorda. *In the month, this segment had a market share of 15.9%, the second highest after that of December 2014 which reached 18.8%".*

Turning to the analysis of the **fuel market**[1], registrations increased for all fuel types **except diesel engines**, as already mentioned.
The market for **petrol cars** is still growing (+11% in the month), representing 33.3% of the total registered cars in July (compared to 33.2% in June). In cumulative terms growth was 3%.
The market for LPG-fuelled cars has risen among **alternative-fuelled cars**, with a positive change of 9% in the month and a drop of 3% in the aggregate. The strong growth of **natural gas** cars also continues, with a 67% increase in July 2018 compared to July 2017, thus bringing the trend growth in the first seven months of 2018 to 61%. **Electric** cars, although with a market share of just 0.4%, recorded the strongest growth trend, both in the month (more than quadrupled) and in the year to date (+152%).
Finally, **cars with hybrid engines** grew by 48% in July and by 33% in the first seven months of 2018. The excellent performance of electric and hybrid cars means that cars

[1] Provisional Data

with these power sources collectively exceeded 5% of the total registered in July, an unprecedented level of 5.6%.

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

Fiat Tipo, on the other hand topped the list of **small to medium** sized cars and accounted for more than a fifth of July sales in this segment.

Fiat 500X (**small SUVs**), Jeep Compass (**compact SUVs**) and Jeep Renegade (**small SUVs**) were the three best-selling SUVs in order, while the Alfa Romeo Stelvio was the best-selling model among the **medium-sized SUVs**. FCA Group SUVs account for almost a quarter of the entire SUV market which was the segment with the best performance in the first half of 2018.

Finally, the Fiat 500L was the best-selling **MPV** and represented more than a quarter of the entire MPV market.

According to the ISTAT survey, in July the **consumer confidence climate index** (base 2010=100) remained at the same level as in the previous month, rising from 116.2 to 116.3. The **composite business confidence index** (Iesi) also showed substantial stability, from 105.5 to 105.4.

Compared with June, the index for consumer confidence in durable goods, including cars was also down (from -43.4 to -44.7).

According to preliminary ISTAT estimates, in July **national consumer price indices** rose by 0. 3% on a monthly basis and by 1.5% on an annual basis (+1.3% in June). The further acceleration in inflation was mainly due to prices for regulated energy goods (reversing the trend from -1,2% in June to +5,3%), and was only partially offset by the slowdown in growth in the prices of transportation services (from +2,9% to +1,7%).

In July 2018 the prices of unregulated fuels showed both an economic variation of -0.6% and a positive trend of 10.4% (+9.4% in June), thus also contributing to the increase in inflation. This trend was due to the increase in prices of all the main elements of these types of products: prices of all the main components: **Diesel** (-1% on a monthly basis, +13.8% on an annual basis, increasing from +12.6% in June). **Petrol** (-0.8% in economic terms, +10.6% in trend terms and +9.7% in the previous month) and **other fuels** (+1.3% on a monthly basis and +8% compared to July 2017).

Overall, **Italian brands** accounted for 42,649 registrations in the month (+3.7%), with a market share of 28%. In the cumulative year from the beginning of 2018 total registrations amounted to 347,993 units (-7.5%), with a market share of 27.3%.

FCA brands (excluding Ferrari and Maserati) totalled 42,107 registrations in the month (+3.4%), with a market share of 27.6%. Positive performances were recorded by Alfa Romeo (+44.5%) and Jeep (+102.3%). There were also good results for Ferrari (+11.9%) as well as for Lamborghini (+216.7%).

In the period from January to July, FCA brands totalled 345,017 registered cars representing a drop of 7.7% and a market share of 27.1%. Overall, year to date sales closed positively with Alfa Romeo (+12.4%) and Jeep (+101%), followed by Ferrari (+12%) and Lamborghini (+36.9%).

Seven Italian models were in the **top ten sales** position in July, with the Fiat Panda (7,664 units) and Fiat 500X (5,302) confirmed as the top two positions in the ranking - not only in the monthly ranking, but also in January to July 2018. They were followed, in fourth place by the Fiat Tipo (3,707) which rose by three positions compared to the previous month. In fifth place we found Jeep Compass (3,676) which gained three positions compared to June's ranking, and in sixth place, the Lancia Ypsilon (3,455). Jeep Renegade (3.141) came in eighth and Fiat Punto (2.926) in tenth.

The **second-hand market** transfers of ownership including quick turnaround sales to dealers in July 2018, representing an increase of 1.4% compared to July 2017. In the first seven months of 2018, transfers of ownership were 2,692,089, down 2.8% from the same period in 2017.

For more information: ANFIA Press Office
Miriam Gangi (Ms.) - m.gangi@anfia.it
Telephone: +39 011 5546502
Mobile: +39 338 7303167

Comunicato Stampa

ITALIA - IMMATRICOLAZIONI AUTOVETTURE
ITALY - NEW CAR REGISTRATIONS

dati provvisori/*provisional data*

MARCA/*MAKE*	LUGLIO *JULY* 2018	%	2017	%	VAR. % *% CHG. 18/17*	GENNAIO/LUGLIO *JANUARY/JULY* 2018	%	2017	%	VAR. % *% CHG. 18/17*
FCA	42.107	27,63	40.718	27,90	3,41	345.017	27,09	373.783	29,13	-7,70
FIAT	26.537	17,41	29.512	20,22	-10,08	226.956	17,82	276.375	21,54	-17,88
ALFA ROMEO	4.910	3,22	3.397	2,33	44,54	32.187	2,53	28.626	2,23	12,44
LANCIA/CHRYSLER	3.455	2,27	4.248	2,91	-18,67	30.615	2,40	41.295	3,22	-25,86
JEEP	7.205	4,73	3.561	2,44	102,33	55.259	4,34	27.487	2,14	101,04
FERRARI	47	0,03	42	0,03	11,90	280	0,02	250	0,02	12,00
MASERATI	309	0,20	323	0,22	-4,33	1.797	0,14	1.990	0,16	-9,70
LAMBORGHINI	38	0,02	12	0,01	216,67	141	0,01	103	0,01	36,89
ALTRE NAZIONALI	148	0,10	38	0,03	289,47	758	0,06	281	0,02	169,75
TOT. MARCHE NAZ.	**42.649**	27,99	**41.133**	28,18	3,69	**347.993**	27,32	**376.407**	29,33	-7,55
AUDI	5.250	3,45	5.293	3,63	-0,81	43.725	3,43	43.301	3,37	0,98
BMW	4.106	2,69	4.002	2,74	2,60	37.000	2,90	37.968	2,96	-2,55
CITROEN	6.074	3,99	6.024	4,13	0,83	58.036	4,56	52.578	4,10	10,38
DACIA	4.970	3,26	5.972	4,09	-16,78	39.128	3,07	38.983	3,04	0,37
FORD	9.759	6,40	10.145	6,95	-3,80	86.981	6,83	89.952	7,01	-3,30
HONDA	638	0,42	689	0,47	-7,40	5.915	0,46	6.438	0,50	-8,12
HYUNDAI	4.260	2,80	3.734	2,56	14,09	33.198	2,61	34.750	2,71	-4,47
INFINITI	51	0,03	109	0,07	-53,21	399	0,03	1.418	0,11	-71,86
JAGUAR	619	0,41	372	0,25	66,40	5.860	0,46	3.534	0,28	65,82
KIA	4.505	2,96	4.366	2,99	3,18	31.290	2,46	31.090	2,42	0,64
LAND ROVER	1.025	0,67	1.551	1,06	-33,91	11.819	0,93	12.228	0,95	-3,34
MAZDA	798	0,52	846	0,58	-5,67	6.797	0,53	6.388	0,50	6,40
MERCEDES	4.239	2,78	5.371	3,68	-21,08	39.108	3,07	41.500	3,23	-5,76
MINI	1.374	0,90	1.612	1,10	-14,76	13.033	1,02	14.629	1,14	-10,91
MITSUBISHI	535	0,35	302	0,21	77,15	3.062	0,24	2.443	0,19	25,34
NISSAN	4.145	2,72	4.861	3,33	-14,73	37.923	2,98	40.369	3,15	-6,06
OPEL	7.225	4,74	7.542	5,17	-4,20	62.721	4,92	66.658	5,19	-5,91
PEUGEOT	7.995	5,25	8.428	5,77	-5,14	70.800	5,56	66.653	5,19	6,22
PORSCHE	816	0,54	525	0,36	55,43	4.028	0,32	3.660	0,29	10,05
RENAULT	11.109	7,29	8.037	5,51	38,22	85.263	6,69	86.078	6,71	-0,95
SEAT	1.405	0,92	1.247	0,85	12,67	13.961	1,10	10.995	0,86	26,98
SKODA	1.519	1,00	1.627	1,11	-6,64	16.232	1,27	14.519	1,13	11,80
SMART	2.208	1,45	1.766	1,21	25,03	16.988	1,33	17.906	1,40	-5,13
SSANGYONG	200	0,13	163	0,11	22,70	1.491	0,12	1.465	0,11	1,77
SUBARU	295	0,19	152	0,10	94,08	2.009	0,16	1.827	0,14	9,96
SUZUKI	2.576	1,69	2.391	1,64	7,74	20.257	1,59	19.388	1,51	4,48
TOYOTA	7.034	4,62	6.631	4,54	6,08	55.628	4,37	54.606	4,26	1,87
LEXUS	294	0,19	170	0,12	72,94	2.241	0,18	2.142	0,17	4,62
VOLKSWAGEN	12.885	8,46	9.484	6,50	35,86	109.265	8,58	92.183	7,18	18,53
VOLVO	1.633	1,07	1.304	0,89	25,23	10.678	0,84	10.458	0,81	2,10
ALTRE	202	0,13	93	0,06	117,20	901	0,07	728	0,06	23,76
TOT.MARCHE EST.	**109.744**	72,01	**104.809**	71,82	4,71	**925.737**	72,68	**906.835**	70,67	2,08
TOT.MERCATO	**152.393**	100,00	**145.942**	100,00	4,42	**1.273.730**	100,00	**1.283.242**	100,00	-0,74

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 31/07/2018

Associazione Nazionale Filiera Industria Automobilistica

Sede di Torino: 10128 - Corso Galileo Ferraris, 61 – Tel. +39 011 5546511 – Fax +39 011 545464
Dir. Studi e Ricerche: Tel. +39 0115546524 – E-mail: studi.ricerche@anfia.it – www.anfia.it
Sede di Roma: 00144 - Viale Pasteur, 10 – Tel. +39 06 54221493 (4) – Fax +39 06 54221418 – E-mail: anfia.roma@anfia.it

ANFIA
Associazione Nazionale
Filiera
Industria Automobilistica

ITALIA - IMMATRICOLAZIONI AUTOVETTURE - Top ten

ITALY - NEW CAR REGISTRATIONS - Top ten

dati provvisori/*provisional data*

TOP 10

N.	MARCA *Make*	MODELLO *Model*	LUGLIO[1] 2018 *JULY 2018*
1	FIAT	PANDA	7.664
2	FIAT	500X	5.302
3	RENAULT	CLIO	4.944
4	FIAT	TIPO	3.707
5	JEEP	COMPASS	3.676
6	LANCIA	YPSILON	3.455
7	VOLKSWAGEN	POLO	3.226
8	JEEP	RENEGADE	3.141
9	VOLKSWAGEN	TIGUAN	3.022
10	FIAT	PUNTO	2.926

Fonte: CED - Ministero dei Trasporti

N.	MARCA *Make*	MODELLO *Model*	GEN/LUG 2018 *JAN/JUL 2018*
1	FIAT	PANDA	74.079
2	FIAT	500X	36.037
3	RENAULT	CLIO	32.885
4	FIAT	500[2] (Comprende 500 Abarth)	32.312
5	FIAT	TIPO	31.969
6	LANCIA	YPSILON	30.616
7	FORD	FIESTA	28.136
8	VOLKSWAGEN	POLO	27.862
9	CITROEN	C3	27.542
10	JEEP	RENEGADE	27.493

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

1 - Insieme al modello Abarth, la Fiat 500 sarebbe all'ottavo posto nella classifica del mese

2 - Comprende le Abarth 500

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/07/2018

Associazione Nazionale Filiera Industria Automobilistica

Sede di Torino: 10128 - Corso Galileo Ferraris, 61 – Tel. +39 011 5546511 – Fax +39 011 545464

Dir. Studi e Ricerche: Tel. +39 0115546524 – E-mail: studi.ricerche@anfia.it – www.anfia.it

Sede di Roma: 00144 - Viale Pasteur, 10 – Tel. +39 06 54221493 (4) – Fax +39 06 54221418 – E-mail: anfia.roma@anfia.it