Press Release

THE ITALIAN CAR MARKET SLOWED DOWN IN MAY: -2.8%

The uncertainty of the political situation in Italy may have affected this slowdown in demand, creating a climate of expectation within the market

Turin, 1st June 2018 – According to figures published today by the Ministry of Infrastructure and Transport, the Italian car market totalled 199,113 registrations in May, representing a decrease of 2.8% compared to the same month in 2017.

Volumes registered in the first five months of 2018 therefore totalled 945,677 units, 0.3% less than in the same period of 2017.

"After the recovery in April, the car market slowed down again in May 2018 (-2.8%), whilst in the first five months of the year volumes were in line with those of the same period in 2017". – commented **Aurelio Nervo, President of ANFIA**. "*The uncertainty in the Italian political situation may have affected this slowdown in demand by creating a climate of expectation within the market.*

The downward trend in diesel engines continued during the month, something that was even more evident in European countries such as Germany, the United Kingdom and Spain. Alternative-fuelled cars, on the other hand in May 2017, gained 13% of the market thanks to an increase in sales of 16%, due to the good performance of hybrids, electrics and natural gas cars. In the first five months registrations of alternative-fuelled cars grew by 15% and accounted for 12.3% of the market".

Analysing the **registrations by fuel type**[1], in May there was an increase in the number of registrations of cars of all types of fuel, except for LPG and diesel; the latter recorded a downward trend of 10% and represented 51.5% of the market in the month. Diesel cars have not had such a low market share since October 2012 when their market share was 51.2%. In January to May the diesel car market fell by 4.3% with a 54% share. Petrol powered cars grew by 3% in May and reached a share of 35.4% which represents the highest share in the last 25 months. Since the beginning of the year, petrol cars have been slightly above 2017 levels (+1.3%). Hybrid cars grow by 12% in the month, while electric cars quadrupled compared to May 2017. Together, hybrids and electric cars represented 4.2% of the May car market (4% since the beginning of the year and one percentage point more than in the first five months of 2017). LPG cars fell by 3.5% in the month and by 3.9% in the year as a whole, while cars powered by natural gas grew more than twice as much (+106%) and achieved a 2.8% share (compared to 1.3% in May 2017). In the year as a whole, bi-fuel cars powered by natural gas grew by 56%.

[1] Provisional Data

In terms of **market segmentation**, in May Fiat Panda and Fiat 500 accounted for 54% of the super-utility segment and were the two best-selling models in this segment. Fiat Tipo was the top-selling model in the lower-medium segment and together with the Alfa Romeo Giulietta (in third place) accounted for 26% of the segment's share.

In May 2018, Jeep Renegade (ranked first) and Fiat 500X (second) were the two best-selling small SUVs and accounted for 34% of this sector, while Jeep Compass was the best-selling compact SUV (the second largest SUV sold) and Alfa Romeo Stelvio was the best-selling medium-sized SUV. The FCA range accounted for 23% of the total SUV market. Fiat 500L was the most popular MPV and represented almost a third of all MPVs sold (49% if we only count small MPVs, of which it is a part of).

According to the ISTAT survey, **the consumer confidence index** (base 2010=100) fell from 116.9 to 113.7 in May. The **composite business confidence index (Iesi)** also deteriorated slightly from 105.0 to 104.7. Furthermore, with reference to the climate of consumer confidence, as regards to the purchasing of durable goods, including cars, the balance relating to current opportunities has fallen (from -48.5 to -50.0).

According to preliminary ISTAT estimates, in May the **national consumer price index** recorded an increase of 0,4% on a monthly basis and of 1,1% on an annual basis (a significant improvement compared to +0,5% in April). The marked recovery in inflation was mainly due to prices of raw foods and unregulated energy goods (from +2,7% to +5,3%), to which must be added the reversal of the trend in the prices of transport services (from -0,7% to +1,7%).

The prices of unregulated energy goods recorded a positive change of +2.1% compared to the previous month and equal to +5.3% compared to the same month of 2017 (from +2.7% in April). This trend was due to the increase in prices of main components of this type of product: **Diese**l (+2.8% on a cyclical basis, +7.2% on an annual basis, accelerating from +3.8% in April), **Petrol** (+2.4% compared to April 2018, +5.2% in trend terms, from +2.1% in the previous month) and **Other fuels** (+0.2% and +3.2% respectively).

National brands as a whole totalled 55,495 registrations in the month (-8%), with a market share of 27.9%. In the first five months of 2018 total registrations amounted to 261,397 units (-7%), with a market share of 27.6%.

FCA brands (excluding Ferrari and Maserati) accounted for a total of 55,071 registrations in the month (-8%) with a market share of 27.7%. A positive performance by both Alfa Romeo (+3.8%) and Jeep (+129.6%). Ferrari also performed well (+15.4%).

In the period from January to May, FCA's brands totalled 259,423 registered cars representing a drop of 7.1% and a market share of 27.6%. The Alfa Romeo (+15.2%) and Jeep (+102.6%) brands both performed well since the beginning of the year, alongside Ferrari (+3.5%) and Lamborghini (+5.6%).

Seven Italian models were again in the **top ten** in May, with Fiat Panda still leading the ranking (13,671 units), followed in third place by Jeep Renegade (5,099), which rose four places, and in fourth place by Lancia Ypsilon (5,068). Fifth place went to the Fiat 500L (4,620), followed by Jeep Compass (4,493) in seventh place and Fiat Tipo (4,410) in eighth. The ninth place in the top ten went to the Fiat 500X (4,357).

The **used car market** totalled 403,987 transfers of ownership including quick turnaround sales to dealers in May 2018, this represented a decrease of 2.2% compared to May 2017. In the first five months of 2018 there were 1,947,473 transfers of ownership which was 3.3% lower than in the same period of 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.

Comunicato Stampa

ITALIA - IMMATRICOLAZIONI AUTOVETTURE

ITALY - NEW CAR REGISTRATIONS

dati provvisori/*provisional data*

	MAGGIO *MAY*				VAR. % *% CHG.*	GENNAIO/MAGGIO *JANUARY/MAY*				VAR. % *% CHG.*
MARCA/*MAKE*	**2018**	*%*	**2017**	*%*	*18/17*	**2018**	*%*	**2017**	*%*	*18/17*
FCA	55.071	*27,66*	59.986	*29,29*	*-8,19*	259.423	*27,43*	279.353	*29,44*	*-7,13*
FIAT	35.336	*17,75*	45.780	*22,35*	*-22,81*	172.325	*18,22*	206.506	*21,76*	*-16,55*
ALFA ROMEO	4.782	*2,40*	4.606	*2,25*	*3,82*	23.620	*2,50*	20.508	*2,16*	*15,17*
LANCIA/CHRYSLER	5.068	*2,55*	5.294	*2,58*	*-4,27*	23.159	*2,45*	32.436	*3,42*	*-28,60*
JEEP	9.885	*4,96*	4.306	*2,10*	*129,56*	40.319	*4,26*	19.903	*2,10*	*102,58*
FERRARI	45	*0,02*	39	*0,02*	*15,38*	176	*0,02*	170	*0,02*	*3,53*
MASERATI	220	*0,11*	268	*0,13*	*-17,91*	1.240	*0,13*	1.430	*0,15*	*-13,29*
LAMBORGHINI	17	*0,01*	19	*0,01*	*-10,53*	75	*0,01*	71	*0,01*	*5,63*
ALTRE NAZIONALI	142	*0,07*	33	*0,02*	*330,30*	483	*0,05*	193	*0,02*	*150,26*
TOT. MARCHE NAZ.	**55.495**	*27,87*	**60.345**	*29,46*	*-8,04*	**261.397**	*27,64*	**281.217**	*29,63*	*-7,05*
AUDI	6.481	*3,25*	6.887	*3,36*	*-5,90*	31.203	*3,30*	31.349	*3,30*	*-0,47*
BMW	5.243	*2,63*	5.694	*2,78*	*-7,92*	27.215	*2,88*	28.788	*3,03*	*-5,46*
CITROEN	8.391	*4,21*	8.578	*4,19*	*-2,18*	44.812	*4,74*	38.831	*4,09*	*15,40*
DACIA	6.289	*3,16*	6.804	*3,32*	*-7,57*	28.429	*3,01*	26.254	*2,77*	*8,28*
FORD	12.761	*6,41*	13.869	*6,77*	*-7,99*	65.604	*6,94*	67.493	*7,11*	*-2,80*
HONDA	819	*0,41*	873	*0,43*	*-6,19*	4.401	*0,47*	4.884	*0,51*	*-9,89*
HYUNDAI	5.274	*2,65*	5.681	*2,77*	*-7,16*	23.761	*2,51*	25.380	*2,67*	*-6,38*
INFINITI	35	*0,02*	218	*0,11*	*-83,94*	300	*0,03*	1.097	*0,12*	*-72,65*
JAGUAR	897	*0,45*	627	*0,31*	*43,06*	4.378	*0,46*	2.703	*0,28*	*61,97*
KIA	4.773	*2,40*	4.835	*2,36*	*-1,28*	22.762	*2,41*	22.304	*2,35*	*2,05*
LAND ROVER	1.653	*0,83*	1.622	*0,79*	*1,91*	9.202	*0,97*	8.948	*0,94*	*2,84*
MAZDA	872	*0,44*	859	*0,42*	*1,51*	5.228	*0,55*	4.584	*0,48*	*14,05*
MERCEDES	6.198	*3,11*	6.745	*3,29*	*-8,11*	29.107	*3,08*	29.341	*3,09*	*-0,80*
MINI	2.005	*1,01*	2.351	*1,15*	*-14,72*	9.603	*1,02*	10.482	*1,10*	*-8,39*
MITSUBISHI	453	*0,23*	355	*0,17*	*27,61*	2.037	*0,22*	1.794	*0,19*	*13,55*
NISSAN	5.199	*2,61*	6.162	*3,01*	*-15,63*	29.610	*3,13*	28.424	*3,00*	*4,17*
OPEL	10.096	*5,07*	10.542	*5,15*	*-4,23*	46.470	*4,91*	50.123	*5,28*	*-7,29*
PEUGEOT	10.398	*5,22*	10.560	*5,16*	*-1,53*	53.843	*5,69*	50.072	*5,28*	*7,53*
PORSCHE	692	*0,35*	716	*0,35*	*-3,35*	2.502	*0,26*	2.609	*0,27*	*-4,10*
RENAULT	15.145	*7,61*	14.452	*7,06*	*4,80*	60.818	*6,43*	63.648	*6,71*	*-4,45*
SEAT	2.147	*1,08*	1.690	*0,83*	*27,04*	10.546	*1,12*	8.069	*0,85*	*30,70*
SKODA	2.463	*1,24*	2.405	*1,17*	*2,41*	12.284	*1,30*	10.629	*1,12*	*15,57*
SMART	2.986	*1,50*	3.150	*1,54*	*-5,21*	11.595	*1,23*	13.695	*1,44*	*-15,33*
SSANGYONG	211	*0,11*	211	*0,10*	*0,00*	1.073	*0,11*	1.089	*0,11*	*-1,47*
SUBARU	307	*0,15*	288	*0,14*	*6,60*	1.346	*0,14*	1.447	*0,15*	*-6,98*
SUZUKI	3.218	*1,62*	2.854	*1,39*	*12,75*	15.231	*1,61*	13.880	*1,46*	*9,73*
TOYOTA	8.419	*4,23*	8.789	*4,29*	*-4,21*	40.976	*4,33*	40.767	*4,30*	*0,51*
LEXUS	507	*0,25*	300	*0,15*	*69,00*	1.774	*0,19*	1.409	*0,15*	*25,90*
VOLKSWAGEN	17.911	*9,00*	14.928	*7,29*	*19,98*	80.196	*8,48*	69.422	*7,32*	*15,52*
VOLVO	1.675	*0,84*	1.305	*0,64*	*28,35*	7.476	*0,79*	7.682	*0,81*	*-2,68*
ALTRE	100	*0,05*	112	*0,05*	*-10,71*	498	*0,05*	524	*0,06*	*-4,96*
TOT.MARCHE EST.	**143.618**	*72,13*	**144.462**	*70,54*	*-0,58*	**684.280**	*72,36*	**667.721**	*70,37*	*2,48*
TOT.MERCATO	**199.113**	*100,00*	**204.807**	*100,00*	*-2,78*	**945.677**	*100,00*	**948.938**	*100,00*	*-0,34*

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 31/05/2018

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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*	MAGGIO[1] 2018 *MAY[1] 2018*
1	FIAT	PANDA	13.671
2	RENAULT	CLIO	5.657
3	JEEP	RENEGADE	5.099
4	LANCIA	YPSILON	5.068
5	FIAT	500L	4.620
6	VOLKSWAGEN	POLO	4.523
7	JEEP	COMPASS	4.493
8	FIAT	TIPO	4.410
9	FIAT	500X	4.357
10	VOLKSWAGEN	GOLF	4.321

Fonte: CED - Ministero dei Trasporti

N.	MARCA *Make*	MODELLO *Model*	GEN/MAG 2018 *JAN/MAY 2018*
1	FIAT	PANDA	57.026
2	FIAT	500[2] (Comprende 500 Abarth)	26.087
3	FIAT	500X	25.681
4	FIAT	TIPO	24.473
5	LANCIA	YPSILON	23.161
6	RENAULT	CLIO	23.052
7	FORD	FIESTA	22.199
8	CITROEN	C3	21.326
9	VOLKSWAGEN	POLO	20.744
10	VOLKSWAGEN	GOLF	20.584

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

1 - La top10 del mese di maggio del comunicato stampa del Ministero non comprende la Fiat 500, che, sommando le versioni Fiat e Abarth, raggiungerebbe l'ottavo posto nella classifica del mese

2 - Comprende le Abarth 500

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