Press Release

DURING NOVEMBER THE ITALIAN CAR MARKET KEEPS TO DECREASE (-6.3%), BUT IT SHOWS A SLIGHTLY INCREASE RESPECT TO THE PREVIOUS TWO MONTHS

The new standards which measure the emissions are the reason of the decrease of this last period

Turin, December 3rd 2018 - According to the data published today by the Minister of Infrastructures and Transport, during November, the Italian car market reached 146,991 registrations, in decrease of 6.3% respect to the same month of 2017.

The volumes registered in the first eleven months of 2018 reached 1,785,722 units, the 3.5% less respect to the volumes of the same period of 2017.

"During November, the car market, keeps to decrease (-6.3%), but it shows a slightly increase respect to the two previous months. The new standards which measure the emissions are the reason of the decrease of the last period - says **Aurelio Nervo, President of ANFIA.**

In this contest, the Italian Manufacturer is focusing his job on the quality of the sales with good signs of growth in the most profitable channels – sales to the private owners, long term fleet rental. The Jeep brand kept a growing trend in the last months, reaching a market share of 4.4% in the progressive since the beginning of the year".

Analyzing **registrations by fuelling[1]**, during November 2018 the registrations of petrol, hybrid and electric cars grows, while decrease diesel, LPG and natural gas cars.
Diesel cars keep to decrease, -25% in November, with a share of 44.8%. Since the beginning of the year, this decrease stops at -12%.
Petrol cars registrations grow instead, with an increasement of 27% and in the cumulate of 6%. The market share reaches the 41%.
Alternative powered cars represent the 14.2% of the market of November, slowing down of 2.4% during the month while it increases of 11% in the cumulate.
LPG cars decreases both in November (-6.5%), and in the first 11 months of 2018 (-3.5%), with a market share of 7.1% during the month.
Natural gas cars, instead, strongly decrease during November, -41%, keeping anyway a positive trend in the cumulate since the beginning of the year (+20%). The market share of these cars is about 1.3%.

[1] Temporary Data

It keeps to grow of cars with zero emissions: registrations of the electric vehicles grow of 192% in November, with a market of 460 units, and of 154% in the cumulate. The market share of these cars is about 0.3%.
Hybrid cars see their own market growing of 18% in November and of 32% in the first 11 month of 2018. The market share of these cars, in November is of 5.4%.

Referring to the **market by segments**, during November 2018, Fiat Panda and Fiat 500 are the best sold cars in the segment of the super economy cars. Together the two models have a market share in the segment of 54%. Lancia Ypsilon is the best sold car in the economy car segment and it represents the 14% of the November market. Jeep Renegade and Fiat 500X are the two small SUVs most sold and they represent the 30% of their market, while Jeep Compass is the best sold month among the compact SUVs. FCA Group models represent the 20% of the market of the all SUVs.

According to ISTAT survey, in November the **consumer confidence climate index** (basis 2010=100) slows down from 116.5 to 114.8. The composite **index of the company confidence climate** (Iesi), registers a slow down for the fifth month in row, passing from 102.5 to 101.1.

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 growing respect to October (from -44.5 to -42.3).

According to the last ISTAT data available, in November the **national index of consumer prices** registers a slowdown of 0.1% per month and an increase of 1.7% per year (from +1.6% registered in the previous month). What explains the November dynamics are the slightly increasement of the prices of several products (among them the Transport services from +1.8% to +2.0%) which overtake the slowing down of the energetic goods not regulated (from +9.5% to +7.8%), their growth is pretty wide and together with the regulated goods (stable at +10.7%) contributes for almost the half the wide of the inflation rate.

National brands, overall, totalized during the month 35,873 registrations (-9.4%), with a market share of 24.4%. In the cumulate since the beginning of 2018, the overall registrations reached the 472,478 units (-10.7%), with a market share of 26.5%.

FCA brands (excluding Ferrari and Maserati) totalized in the overall 35,444 registrations during the month (-9.9%), with a share of 24.1%. A positive trend for Lancia (+14%) and Jeep (+34.3%) brands. Good also for Maserati (+3.9%) and Lamborghini (+133.3%).

From January to November, FCA brands totalized 467,896 registered cars, with a slowdown of 11% and a market share of 26.2%. Close positively the progressive 2018 Jeep (+71.7%), together with Ferrari (+13.4%) and Lamborghini (+61.8%).

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During November, the Italian models in the **top ten of the best sold**, are five, with Fiat Panda (12,277 units) still in the first place, followed, in the second place, by Lancia Ypsilon (4,463), which is stable, and by Jeep Renegade (3,608), which climb up of seven places. The sixth place is occupied by Fiat 500X (3,334), followed, at the seventh, by Jeep Compass (3,093).

The **second-hand market** totalized 374,356 ownerships transfers, including the mini-transfer operations to car dealers, in November 2018, showing a slowdown of 3.6% respect to November 2017. In the first eleven months 2018, ownerships transfers are 4,088,999, the 3.1% less respect the same period of 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

ANFIA Associazione Nazionale Filiera Industria Automobilistica

ITALIA - IMMATRICOLAZIONI AUTOVETTURE
ITALY - NEW CAR REGISTRATIONS

dati provvisori/*provisional data*

	NOVEMBRE *NOVEMBRE*				VAR. % *% CHG.*	GENNAIO/NOVEMBRE *JANUARY/NOVEMBER*				VAR. % *% CHG.*
MARCA/*MAKE*	**2018**	*%*	**2017**	*%*	*18/17*	**2018**	*%*	**2017**	*%*	*18/17*
FCA	35.444	*24,11*	39.334	*25,07*	*-9,89*	467.896	*26,20*	525.606	*28,42*	*-10,98*
FIAT	22.064	*15,01*	26.131	*16,66*	*-15,56*	304.634	*17,06*	380.601	*20,58*	*-19,96*
ALFA ROMEO	1.851	*1,26*	4.026	*2,57*	*-54,02*	41.191	*2,31*	42.459	*2,30*	*-2,99*
LANCIA/CHRYSLER	4.463	*3,04*	3.916	*2,50*	*13,97*	44.202	*2,48*	57.195	*3,09*	*-22,72*
JEEP	7.066	*4,81*	5.261	*3,35*	*34,31*	77.869	*4,36*	45.351	*2,45*	*71,70*
FERRARI	14	*0,01*	21	*0,01*	*-33,33*	381	*0,02*	336	*0,02*	*13,39*
MASERATI	214	*0,15*	206	*0,13*	*3,88*	2.621	*0,15*	2.767	*0,15*	*-5,28*
LAMBORGHINI	14	*0,01*	6	*0,00*	*133,33*	199	*0,01*	123	*0,01*	*61,79*
ALTRE NAZIONALI	187	*0,13*	35	*0,02*	*434,29*	1.381	*0,08*	411	*0,02*	*236,01*
TOT. MARCHE NAZ.	**35.873**	*24,40*	**39.602**	*25,24*	*-9,42*	**472.478**	*26,46*	**529.243**	*28,61*	*-10,73*
AUDI	4.546	*3,09*	5.325	*3,39*	*-14,63*	58.030	*3,25*	64.023	*3,46*	*-9,36*
BMW	4.469	*3,04*	5.349	*3,41*	*-16,45*	53.560	*3,00*	56.449	*3,05*	*-5,12*
CITROEN	6.130	*4,17*	6.433	*4,10*	*-4,71*	80.029	*4,48*	75.780	*4,10*	*5,61*
DACIA	6.319	*4,30*	4.446	*2,83*	*42,13*	56.167	*3,15*	53.859	*2,91*	*4,29*
FORD	9.213	*6,27*	10.621	*6,77*	*-13,26*	122.035	*6,83*	126.118	*6,82*	*-3,24*
HONDA	728	*0,50*	788	*0,50*	*-7,61*	8.332	*0,47*	9.207	*0,50*	*-9,50*
HYUNDAI	4.654	*3,17*	5.775	*3,68*	*-19,41*	50.013	*2,80*	54.282	*2,93*	*-7,86*
INFINITI	14	*0,01*	86	*0,05*	*-83,72*	534	*0,03*	1.810	*0,10*	*-70,50*
JAGUAR	892	*0,61*	481	*0,31*	*85,45*	8.710	*0,49*	5.003	*0,27*	*74,10*
KIA	3.402	*2,31*	3.684	*2,35*	*-7,65*	45.088	*2,52*	44.482	*2,40*	*1,36*
LAND ROVER	1.423	*0,97*	1.578	*1,01*	*-9,82*	16.350	*0,92*	17.657	*0,95*	*-7,40*
MAZDA	902	*0,61*	882	*0,56*	*2,27*	10.164	*0,57*	9.765	*0,53*	*4,09*
MERCEDES	5.262	*3,58*	5.745	*3,66*	*-8,41*	56.905	*3,19*	61.388	*3,32*	*-7,30*
MINI	2.077	*1,41*	2.629	*1,68*	*-21,00*	19.454	*1,09*	22.899	*1,24*	*-15,04*
MITSUBISHI	705	*0,48*	329	*0,21*	*114,29*	5.443	*0,30*	3.483	*0,19*	*56,27*
NISSAN	3.285	*2,23*	4.266	*2,72*	*-23,00*	51.654	*2,89*	58.565	*3,17*	*-11,80*
OPEL	7.469	*5,08*	7.502	*4,78*	*-0,44*	89.778	*5,03*	95.203	*5,15*	*-5,70*
PEUGEOT	8.706	*5,92*	8.422	*5,37*	*3,37*	101.225	*5,67*	97.141	*5,25*	*4,20*
PORSCHE	123	*0,08*	408	*0,26*	*-69,85*	4.866	*0,27*	5.125	*0,28*	*-5,05*
RENAULT	8.109	*5,52*	12.114	*7,72*	*-33,06*	116.237	*6,51*	125.148	*6,77*	*-7,12*
SEAT	1.519	*1,03*	1.425	*0,91*	*6,60*	18.878	*1,06*	16.274	*0,88*	*16,00*
SKODA	2.081	*1,42*	1.957	*1,25*	*6,34*	23.694	*1,33*	21.607	*1,17*	*9,66*
SMART	1.659	*1,13*	2.237	*1,43*	*-25,84*	23.241	*1,30*	25.116	*1,36*	*-7,47*
SSANGYONG	219	*0,15*	197	*0,13*	*11,17*	2.319	*0,13*	2.099	*0,11*	*10,48*
SUBARU	336	*0,23*	278	*0,18*	*20,86*	3.183	*0,18*	2.765	*0,15*	*15,12*
SUZUKI	3.200	*2,18*	2.732	*1,74*	*17,13*	30.499	*1,71*	29.099	*1,57*	*4,81*
TOYOTA	7.822	*5,32*	7.493	*4,78*	*4,39*	82.903	*4,64*	80.205	*4,34*	*3,36*
LEXUS	335	*0,23*	426	*0,27*	*-21,36*	3.443	*0,19*	3.475	*0,19*	*-0,92*
VOLKSWAGEN	13.323	*9,06*	11.917	*7,60*	*11,80*	151.332	*8,47*	135.562	*7,33*	*11,63*
VOLVO	2.006	*1,36*	1.658	*1,06*	*20,99*	17.533	*0,98*	15.679	*0,85*	*11,82*
ALTRE	190	*0,13*	101	*0,06*	*88,12*	1.645	*0,09*	1.145	*0,06*	*43,67*
TOT.MARCHE EST.	**111.118**	*75,60*	**117.284**	*74,76*	*-5,26*	**1.313.244**	*73,54*	**1.320.413**	*71,39*	*-0,54*
TOT.MERCATO	**146.991**	*100,00*	**156.886**	*100,00*	*-6,31*	**1.785.722**	*100,00*	**1.849.656**	*100,00*	*-3,46*

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 30/11/2018

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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*	NOVEMBRE[1] 2018 *NOVEMBER 2018*
1	FIAT	PANDA	12.277
2	LANCIA	YPSILON	4.463
3	JEEP	RENEGADE	3.608
4	RENAULT	CLIO	3.466
5	DACIA	SANDERO	3.416
6	FIAT	500X	3.334
7	JEEP	COMPASS	3.093
8	VOLKSWAGEN	GOLF	2.987
9	VOLKSWAGEN	TIGUAN	2.924
10	CITROEN	C3	2.837

Fonte: CED - Ministero dei Trasporti

N.	MARCA *Make*	MODELLO *Model*	GEN/NOV 2018 *JAN/NOV 2018*
1	FIAT	PANDA	112.042
2	FIAT	500X	47.044
3	RENAULT	CLIO	46.272
4	LANCIA	YPSILON	44.203
5	FIAT	500[2] (Comprende 500 Abarth)	42.218
6	FIAT	TIPO	38.737
7	JEEP	RENEGADE	38.476
8	CITROEN	C3	37.921
9	FORD	FIESTA	37.834
10	VOLKSWAGEN	POLO	37.764

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

1 - Insieme alla versione Abarth, la Fiat 500 occuperebbe la decima posizione

2 - Comprende le Abarth 500

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