



## Press Release

### **THE MONTH BEFORE THE ENTER IN FORCE OF THE BONUS-MALUS LAW UNDERLINES THE MARKET DISTORTION ALREADY ANNOUNCED: -2,4% IN FEBRUARY**

**The market results confirm the critical issues announced in the past months for the enter in force of the measure, in addition to the implementation operative criticalities**

*Turin, March 1<sup>st</sup> 2019* - According to the data published today by the Minister of Infrastructures and Transport, in February the Italian car market totalize 177,825 registrations, in slowdown of 2.4% respect to the same month of 2018.

The volume registered in the first two months of 2019 reached 343,010 units, the 4.9% less respect to the volumes of the same period in 2018.

*"During February 2019 the car market keeps in slowing (-2.4%), but it grows respect to January (-7.5%) - says Paolo Scudieri, President of ANFIA.*

*It is a month characterized by uncertainty and in waiting because of the announced Bonus-Malus law which enters in force today. This wait produced, since last December, a slowing down of the growth of low emissions cars (electric, hybrid plug-in and extended-range cars) which will be interested by the law, in February they grow of 0.2% (after a December with +27% and a January with +4%), against the double and triple figures monthly increasements registered in 2018. This announced effect, instead, probably has been the reason of the growth of some segments of cars hit by the malus, like medium and big SUVs (+18% and +43%, respectively, in February), moved up the purchases.*

*To be remembered that, even if the eco-tax includes the most polluting cars, the law interests the new generation vehicles (Euro 6) with emissions which are by far lowest that 14.7 milions cars ante Euro 4 in Italy. This measure is based, infact, on CO<sub>2</sub> emissions, which is a gas not very polluting but it is climate altering.*

*Until today, however, there are still remarkable criticalities about the operative ways to make effective this measure. The Revenue Agency did not solved all the problems yet and the interministerial decree has not been published yet on the Official Journal.*

*All this put the commercial operators into difficulty and it adds more uncertainty for consumers. We reiterate our availability for a debate with Institutions to have a clear legislative".*

National Association of Automotive Industry (ANFIA)

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Analyzing registrations by fuelling <sup>1</sup>, in February 2019, the registrations of petrol, hybrid and electric cars grows, while decrease diesel and natural gas cars. Diesel vehicles keeps to slow down, -21% during February, with a share of 45%. These cars reconquered their market leadership, which lost in January in favor of petrol cars, which represent, in February the 42.5% of the market and during the month register an increasement of 29%.

The alternative powered cars represent the 12.3% of February's market and they are in growth of 1.4% during the month. LPG cars decrease of 2% during the month, while methane ones see a big decrease, in February, (-54%, after the fall of 50% in December and of 46% of January). In the overall, natural gas cars represent the 6.8% of February's market (5.7% for LPG and 1.1% for methane).

It keeps to grow the zero emissions cars, even if not like in 2018: registrations of electric cars grow of 3.3% during February after the 16% of January, lowest rates of growth respect to the ones got in 2018. Electric cars market, during February, represent the 0.1% of the market with 240 units. Hybrid cars (included plug-in ones) see their own market grow of 44% during February. The market share of hybrid cars, during the month, is 5.3%, against the 4.2% registered in February 2018.

Referring to the **market by segments**, in February 2019, 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 56%, while Lancia Ypsilon is the best sold car in the economy car segment.

During February, grow the SUV sales of all sizes (+9%), especially the big SUVs (+43%) and the medium ones (+18%), respect to the small (+7.8%) and the compact ones (+5.4%).

FCA Group models represent, during the first month of the year the 21% of the market of the all SUVs, during the second month of the year.

Fiat 500L, in the end, is the best sold monovolume during February 2019.

According to ISTAT survey, in February the **consumer confidence climate index** (basis 2010=100) decreases from 113.9 to 112.4. The composite **index of the company confidence climate** (lesi) registers a slowdown, passing from 99.1 to 98.3, confirming a negative evolution which is active since last July.

Referring to the consumer confidence climate, regarding the purchase of the long lasting

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<sup>1</sup> Temporary data

goods and among them there is the car, the balance regarding the current opportunity is slowing down respect to January (from -39.6 to -47.8).

According to the last ISTAT data available, during February the **national index of consumer prices** grows of 0.2% per month and of 1.1% per year (from +0.9% registered last month). The minor acceleration of the inflation during February is given both by the processed and unprocessed foodstuffs prices, to a lesser extent, by the energetic goods not regulated (from +0.3% to +0.8%) and by tobacco; this dynamics has been partially reduced by the slowing down of the Transportation services prices (from +2.2% to +0.9%) and by the expanding of the slowing down of those and of the services related to Communications.

**National brands**, in the overall, totalized during the month 44,809 registration (-7.4%), with a market share of 25.2%. In the cumulate, since the beginning of 2019, the overall registrations reached 85.101 units (-14.5%), with a market share of 24.8%.

FCA brands (excluding Ferrari and Maserati) totalized in the overall 44,189 registrations during the month (-8%), with a market share of 24.8%. Positive trend for Lancia (+38.9%) and Jeep (+37.6%). Good also for (+70%) and Lamborghini (+81.2%).

In January and February, FCA brands totalized 83,995 registered cars, with a slowdown of 14.98% and a market share of 24.5%. A positive closing for the progressive in 2019 for Lancia (+47.2%) and Jeep (+9.6%), together with Ferrari (+55.4%) and Lamborghini (+108%).

During February, the Italian models in the **top ten of the best sold** are five with Fiat Panda (12,542 units) still at the first place, followed, at the second place, by Lancia Ypsilon (5,816), which is stable, and, at the third, by Jeep Compass (5,106). The seventh place is occupied by Fiat 500X (3,861), which gains a position, followed, at the tenth place, by Jeep Renegade (3,577).

The **second-hand market** totalized 363,084 memberships transfers, including the mini-transfer operations to car dealers, in February 2019, registering a slowing down of 4.1% respect to February 2018. In the first two months of 2019, the memberships transfers are 740,871, the 3.9% less respect to the same period of 2018.



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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.

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## ITALIA - IMMATRICOLAZIONI AUTOVETTURE

## ITALY - NEW CAR REGISTRATIONS

dati provvisori/provisional data

MARCA/MAKE	FEBBRAIO FEBRUARY				VAR. % % CHG. 19/18	GENNAIO/FEBBRAIO JANUARY/FEBRUARY				VAR. % % CHG. 19/18
	2019	%	2018	%		2019	%	2018	%	
FCA	44.189	24,85	48.034	26,36	-8,00	83.995	24,49	98.792	27,40	-14,98
FIAT	26.562	14,94	32.470	17,82	-18,20	51.031	14,88	66.999	18,58	-23,83
ALFA ROMEO	2.362	1,33	4.510	2,47	-47,63	4.838	1,41	9.035	2,51	-46,45
LANCIA/CHRYSLER	5.816	3,27	4.186	2,30	38,94	12.424	3,62	8.438	2,34	47,24
JEEP	9.449	5,31	6.868	3,77	37,58	15.702	4,58	14.320	3,97	9,65
FERRARI	51	0,03	30	0,02	70,00	101	0,03	65	0,02	55,38
MASERATI	254	0,14	269	0,15	-5,58	426	0,12	537	0,15	-20,67
LAMBORGHINI	29	0,02	16	0,01	81,25	52	0,02	25	0,01	108,00
ALTRE NAZIONALI	286	0,16	69	0,04	314,49	527	0,15	131	0,04	302,29
<b>TOT. MARCHE NAZ.</b>	<b>44.809</b>	<b>25,20</b>	<b>48.418</b>	<b>26,57</b>	<b>-7,45</b>	<b>85.101</b>	<b>24,81</b>	<b>99.550</b>	<b>27,61</b>	<b>-14,51</b>
AUDI	5.675	3,19	5.690	3,12	-0,26	9.771	2,85	12.204	3,38	-19,94
BMW	5.658	3,18	5.531	3,04	2,30	10.561	3,08	10.367	2,88	1,87
CITROEN	9.371	5,27	9.310	5,11	0,66	18.549	5,41	18.331	5,08	1,19
DACIA	6.068	3,41	6.897	3,78	-12,02	13.810	4,03	13.045	3,62	5,86
FORD	11.433	6,43	12.870	7,06	-11,17	22.595	6,59	25.427	7,05	-11,14
HONDA	909	0,51	873	0,48	4,12	1.657	0,48	1.678	0,47	-1,25
HYUNDAI	4.123	2,32	4.544	2,49	-9,26	7.681	2,24	8.575	2,38	-10,43
JAGUAR	1.116	0,63	725	0,40	53,93	2.071	0,60	1.357	0,38	52,62
KIA	4.083	2,30	4.431	2,43	-7,85	8.538	2,49	8.495	2,36	0,51
LAND ROVER	2.049	1,15	1.708	0,94	19,96	3.832	1,12	3.679	1,02	4,16
MAHINDRA	106	0,06	19	0,01	457,89	188	0,05	46	0,01	308,70
MAZDA	1.079	0,61	993	0,54	8,66	2.131	0,62	2.153	0,60	-1,02
MERCEDES	5.889	3,31	5.619	3,08	4,81	10.768	3,14	10.431	2,89	3,23
MINI	2.038	1,15	2.017	1,11	1,04	3.595	1,05	3.505	0,97	2,57
MITSUBISHI	757	0,43	357	0,20	112,04	1.473	0,43	745	0,21	97,72
NISSAN	4.518	2,54	6.408	3,52	-29,49	8.627	2,52	12.869	3,57	-32,96
OPEL	9.626	5,41	8.377	4,60	14,91	19.282	5,62	17.101	4,74	12,75
PEUGEOT	11.264	6,33	11.477	6,30	-1,86	22.626	6,60	22.381	6,21	1,09
PORSCHE	346	0,19	442	0,24	-21,72	628	0,18	1.123	0,31	-44,08
RENAULT	9.868	5,55	9.910	5,44	-0,42	18.095	5,28	19.436	5,39	-6,90
SEAT	2.592	1,46	2.160	1,19	20,00	4.204	1,23	3.866	1,07	8,74
SKODA	2.258	1,27	2.344	1,29	-3,67	4.296	1,25	4.614	1,28	-6,89
SMART	1.456	0,82	1.822	1,00	-20,09	3.248	0,95	3.393	0,94	-4,27
SSANGYONG	274	0,15	218	0,12	25,69	486	0,14	403	0,11	20,60
SUBARU	282	0,16	253	0,14	11,46	511	0,15	497	0,14	2,82
SUZUKI	3.510	1,97	2.974	1,63	18,02	6.904	2,01	6.348	1,76	8,76
TOYOTA	8.351	4,70	8.096	4,44	3,15	16.485	4,81	16.281	4,52	1,25
LEXUS	334	0,19	278	0,15	20,14	590	0,17	478	0,13	23,43
VOLKSWAGEN	15.915	8,95	16.228	8,91	-1,93	30.823	8,99	29.669	8,23	3,89
VOLVO	1.877	1,06	1.143	0,63	64,22	3.582	1,04	2.247	0,62	59,41
ALTRE	191	0,11	96	0,05	98,96	302	0,09	259	0,07	16,60
<b>TOT.MARCHE EST.</b>	<b>133.016</b>	<b>74,80</b>	<b>133.810</b>	<b>73,43</b>	<b>-0,59</b>	<b>257.909</b>	<b>75,19</b>	<b>261.003</b>	<b>72,39</b>	<b>-1,19</b>
<b>TOT.MERCATO</b>	<b>177.825</b>	<b>100,00</b>	<b>182.228</b>	<b>100,00</b>	<b>-2,42</b>	<b>343.010</b>	<b>100,00</b>	<b>360.553</b>	<b>100,00</b>	<b>-4,87</b>

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 28/02/2019

Associazione Nazionale Filiera Industria Automobilistica

**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>	FEBBRAIO 2019 <i>FEBRUARY 2019</i>
1	FIAT	PANDA	12.542
2	LANCIA	YPSILON	5.816
3	JEEP	COMPASS	5.106
4	VOLKSWAGEN	POLO	4.863
5	CITROEN	C3	4.674
6	VOLKSWAGEN	T-ROC	4.063
7	FIAT	500X	3.861
8	RENAULT	CLIO	3.778
9	PEUGEOT	208	3.615
10	JEEP	RENEGADE	3.577

Fonte: CED - Ministero dei Trasporti

N.	MARCA <i>Make</i>	MODELLO <i>Model</i>	GEN/FEB 2018 <i>JAN/FEB 2018</i>
1	FIAT	PANDA	27.104
2	LANCIA	YPSILON	12.424
3	CITROEN	C3	8.868
4	VOLKSWAGEN	POLO	8.669
5	VOLKSWAGEN	T-ROC	8.206
6	JEEP	COMPASS	8.087
7	TOYOTA	YARIS	8.009
8	RENAULT	CLIO	7.356
9	FIAT	500X	7.273
10	DACIA	DUSTER	7.173

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

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 28/02/2019

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