

Press Release

REGISTRATION IN JULY FOR THE ITALIAN CAR MARKET ARE STEADY (-0.1%)

Negative record for diesel cars which reached, during the month, the lowest market share since September 2001, which means the 37% and a positive record for the alternative powered cars, with the highest market share since 2015 (18%)

Turin, August 1st 2019 - According to the data published today by the Minister of Infrastructures and Transport, in July, the Italian car market reached 152,800 registrations, in slowdown of 0.1% respect to the same month of 2018.

The volumes registered in the first seven months of 2019 reached 1,235,698 units, the 3% less respect to the volumes of the same period of 2018.

“After the slowdowns of May and June, in July 2019, the car market is steady (-0.1%), despite of the benefit of one working day more respect to July 2018 - says Paolo Scudieri, President of ANFIA.

A negative record is registered for diesel cars, which reach, during the month, the lowest market share since September 2001, 37% (in July 2018 the share was 50.8%). In terms of volumes, the slowdown is of 27% during July and of 24% in the first seven month of 2019. Petrol cars, instead, saw a new growth in the sales during the month, closing with +35%, with a share of 45% and volumes in increasement of 26% in the cumulate.

To point out, instead, as a positive record, the penetration share reached in July by alternative powered cars, 18%, the highest since 2015, with growing volumes of 13%, which means that the first seven months of 2019 close with +8%.

This result arrived, especially, thanks to LPG cars (+12%), hybrid traditional cars (+14%, even if this is the lowest growth of 2019), methane cars (+18%, which back in positive after almost a year), and electric cars (+47%, after an average of +156% in the previous four months, since the entry into force of the ecobonus, and a share of 0.6%). In overall, decrease of 0.8% recharging cars (electric and plug-in hybrid)”.

In details, analyzing registrations by fuelling ¹ what arises is that LPG cars grow both in July (+12%), and in the cumulate (+6%), and reach, during the month, a share of 9%, the highest market share since 2015.

Methane cars (+18% during the month) reached the 2.6% of share, the highest of 2019. The variation in the cumulate remains negative -31%.

¹ Temporary Data

The traditional hybrid cars confirm the growth of the first seven months of 2019: +29%. The contraction of sales for recharging cars in the month is because of the strong slowdown of plug-in hybrid cars, which decrease in July of 44%, after the -43% of June. Recharging cars, within the sale price of 50.000 euro without VAT, are the one which benefit of the ecobonus on their purchase. Together with the all types of hybrid cars electric cars represent during the month the 6.3% of the market, in increasement of 12%.

Referring to the **market by segments**, in July 2019, the segment of super economy grow of 20%, while the economy one decreases of 12%. Together the two segments, represent the 39% of the market and the best selling models are Fiat Panda (supereconomy) and Lancia Ypsilon (economy).

All sizes SUVs represent instead the 41% of the market and grow of 6%, especially thanks to the push of small ones (Jeep Renegade and Fiat 500X the best selling models), in increase of 20%, while decrease compacts SUVs and medium ones (Alfa Romeo Stelvio is the best medium sold SUV). Big SUV grow of 9% instead. FCA Group represent the 19% of the all sizes SUVs market.

A big growth is registered also for luxury (+20%) e and sports cars (+30%), the best sold car is Fiat 124 Spider.

According to the ISTAT survey, in July the **consumer confidence climate index** (basis 2010=100), registers a growing and goes from 109.8 to 113.4. Also the composite **index of the company confidence climate** (lesi) registers a positive growth from 99.3 to 101.2.

Referring to the consumer confidence climate, however, regarding the purchase of the long-lasting goods and among them there is the car, the balance regarding the current opportunity in June grew (from -56.3 to -46.9).

According to the last ISTAT data available, in July, the **national index of consumer prices** registers a growth of 0.1% per month and of 0.5% per year (in slowdown of +0,7% respect to the previous month). The slowdown of the inflation is caused almost exclusively by the trend of prizes of the regulated energetics goods (from +4.3% of June to -3.1%), balanced, marginally, by the accelerations of not regulated foodstuffs and by the services related to the transportations (from +1.5% to +1.8%).

In the field of the not regulated energetics goods, the slowdown (from -0.6% to -0.9%, -0.8% respect to June 2019) is caused by of the trend of **Diesel** prices (from -1.3% to -1.4% in trend terms, -1.1% per month), by **Petrol** which is stable -2% (-0.8% respect to the previous month) and **other fuels** (from -0.1% to -3.1%, -1.7% the situation).

Italian Association of Automotive Industry (ANFIA)



National brands, overall, totaled during the month 34,999 registrations (-18.1%), with a market share of 22.9%. In the cumulate since the beginning of 2019, the overall of registrations reached 305,078 units (-12.4%), with a market share of 24.7%.

FCA brands (excluding Ferrari and Maserati) totaled in overall 34,020 registrations during the month (-19.4%), with a market share of 22.3%. A positive trend for Lancia/Chrysler brands (+24.8%) and Jeep (+3.1%). Also a good trend for Ferrari (+30%) and Lamborghini (+23.7%) is registered.

In the first seven months of 2019, FCA brands totaled 300,867 registered cars, with a slowdown of 12.8% and a market share of 24.3%. Also the cumulate of Lancia/Chrysler brand closes in a positive way since the beginning for the year (+27.4%), together with Ferrari (+22.3%) and Lamborghini (+68.1%).

During July, the Italian models in the **top ten of the best sold**, are five with Fiat Panda (10,678 units) always in the first place, followed by, at the second place, by Lancia Ypsilon (4,315), which gains two position, and at the third place, by Jeep Renegade (4,257). At the fifth place, there is Fiat 500X (3,275), followed at the tenth, by Jeep Compass (2,959).

The **second-hand market** totaled 379,028 ownerships transfers, including the mini-transfer operations to car dealers in July 2019, register a slowdown 1.4% respect to July 2018. In the first seven months of 2019, ownerships transfers are 2,556,245, the 5% less respect of 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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Italian Association of Automotive Industry (ANFIA)

ITALIA - IMMATRICOLAZIONI AUTOVETTURE

ITALY - NEW CAR REGISTRATIONS

dati provvisori/provisional data

| MARCA/MAKE | LUGLIO JULY | | | | VAR. % % CHG. 19/18 | GENNAIO/LUGLIO JANUARY/JULY | | | | VAR. % % CHG. 19/18 |
|-------------------------|----------------|---------------|----------------|---------------|---------------------------|--------------------------------|---------------|------------------|---------------|---------------------------|
| | 2019 | % | 2018 | % | | 2019 | % | 2018 | % | |
| FCA | 34.020 | 22,26 | 42.191 | 27,59 | -19,37 | 300.867 | 24,35 | 345.158 | 27,08 | -12,83 |
| FIAT | 20.088 | 13,15 | 26.597 | 17,39 | -24,47 | 190.760 | 15,44 | 227.059 | 17,81 | -15,99 |
| ALFA ROMEO | 2.171 | 1,42 | 4.914 | 3,21 | -55,82 | 16.577 | 1,34 | 32.193 | 2,53 | -48,51 |
| LANCIA/CHRYSLER | 4.315 | 2,82 | 3.458 | 2,26 | 24,78 | 38.999 | 3,16 | 30.619 | 2,40 | 27,37 |
| JEEP | 7.446 | 4,87 | 7.222 | 4,72 | 3,10 | 54.531 | 4,41 | 55.287 | 4,34 | -1,37 |
| FERRARI | 65 | 0,04 | 50 | 0,03 | 30,00 | 346 | 0,03 | 283 | 0,02 | 22,26 |
| MASERATI | 252 | 0,16 | 309 | 0,20 | -18,45 | 1.441 | 0,12 | 1.797 | 0,14 | -19,81 |
| LAMBORGHINI | 47 | 0,03 | 38 | 0,02 | 23,68 | 237 | 0,02 | 141 | 0,01 | 68,09 |
| ALTRE NAZIONALI | 615 | 0,40 | 151 | 0,10 | 307,28 | 2.187 | 0,18 | 762 | 0,06 | 187,01 |
| TOT. MARCHE NAZ. | 34.999 | 22,91 | 42.739 | 27,94 | -18,11 | 305.078 | 24,69 | 348.141 | 27,31 | -12,37 |
| AUDI | 6.096 | 3,99 | 5.262 | 3,44 | 15,85 | 41.332 | 3,34 | 43.744 | 3,43 | -5,51 |
| BMW | 3.715 | 2,43 | 4.113 | 2,69 | -9,68 | 36.148 | 2,93 | 37.016 | 2,90 | -2,34 |
| CITROEN/DS | 6.621 | 4,33 | 6.093 | 3,98 | 8,67 | 60.667 | 4,91 | 58.050 | 4,55 | 4,51 |
| DACIA | 7.635 | 5,00 | 4.990 | 3,26 | 53,01 | 56.161 | 4,54 | 39.159 | 3,07 | 43,42 |
| FORD | 9.511 | 6,22 | 9.796 | 6,40 | -2,91 | 77.204 | 6,25 | 87.038 | 6,83 | -11,30 |
| HONDA | 620 | 0,41 | 641 | 0,42 | -3,28 | 5.547 | 0,45 | 5.918 | 0,46 | -6,27 |
| HYUNDAI | 4.265 | 2,79 | 4.271 | 2,79 | -0,14 | 29.678 | 2,40 | 33.211 | 2,61 | -10,64 |
| JAGUAR | 730 | 0,48 | 622 | 0,41 | 17,36 | 5.482 | 0,44 | 5.867 | 0,46 | -6,56 |
| KIA | 3.987 | 2,61 | 4.526 | 2,96 | -11,91 | 29.553 | 2,39 | 31.330 | 2,46 | -5,67 |
| LAND ROVER | 1.406 | 0,92 | 1.031 | 0,67 | 36,37 | 10.552 | 0,85 | 11.831 | 0,93 | -10,81 |
| MAHINDRA | 87 | 0,06 | 132 | 0,09 | -34,09 | 676 | 0,05 | 349 | 0,03 | 93,70 |
| MAZDA | 922 | 0,60 | 800 | 0,52 | 15,25 | 7.264 | 0,59 | 6.801 | 0,53 | 6,81 |
| MERCEDES | 4.769 | 3,12 | 4.293 | 2,81 | 11,09 | 38.322 | 3,10 | 39.185 | 3,07 | -2,20 |
| MINI | 1.539 | 1,01 | 1.375 | 0,90 | 11,93 | 13.427 | 1,09 | 13.038 | 1,02 | 2,98 |
| MITSUBISHI | 659 | 0,43 | 538 | 0,35 | 22,49 | 5.200 | 0,42 | 3.065 | 0,24 | 69,66 |
| NISSAN | 3.184 | 2,08 | 4.162 | 2,72 | -23,50 | 28.292 | 2,29 | 37.944 | 2,98 | -25,44 |
| OPEL | 8.494 | 5,56 | 7.248 | 4,74 | 17,19 | 68.595 | 5,55 | 62.760 | 4,92 | 9,30 |
| PEUGEOT | 9.101 | 5,96 | 8.023 | 5,25 | 13,44 | 71.805 | 5,81 | 70.839 | 5,56 | 1,36 |
| PORSCHE | 674 | 0,44 | 817 | 0,53 | -17,50 | 4.044 | 0,33 | 4.030 | 0,32 | 0,35 |
| RENAULT | 9.260 | 6,06 | 11.150 | 7,29 | -16,95 | 75.280 | 6,09 | 85.323 | 6,69 | -11,77 |
| SEAT | 2.380 | 1,56 | 1.409 | 0,92 | 68,91 | 17.087 | 1,38 | 13.973 | 1,10 | 22,29 |
| SKODA | 2.452 | 1,60 | 1.528 | 1,00 | 60,47 | 17.309 | 1,40 | 16.253 | 1,28 | 6,50 |
| SMART | 2.079 | 1,36 | 2.211 | 1,45 | -5,97 | 15.631 | 1,26 | 16.995 | 1,33 | -8,03 |
| SSANGYONG | 196 | 0,13 | 201 | 0,13 | -2,49 | 1.580 | 0,13 | 1.493 | 0,12 | 5,83 |
| SUBARU | 247 | 0,16 | 295 | 0,19 | -16,27 | 1.550 | 0,13 | 2.012 | 0,16 | -22,96 |
| SUZUKI | 3.853 | 2,52 | 2.578 | 1,69 | 49,46 | 24.256 | 1,96 | 20.259 | 1,59 | 19,73 |
| TOYOTA | 6.640 | 4,35 | 7.094 | 4,64 | -6,40 | 56.746 | 4,59 | 55.735 | 4,37 | 1,81 |
| LEXUS | 389 | 0,25 | 295 | 0,19 | 31,86 | 3.450 | 0,28 | 2.242 | 0,18 | 53,88 |
| VOLKSWAGEN | 14.395 | 9,42 | 12.951 | 8,47 | 11,15 | 113.269 | 9,17 | 109.351 | 8,58 | 3,58 |
| VOLVO | 1.613 | 1,06 | 1.639 | 1,07 | -1,59 | 12.547 | 1,02 | 10.686 | 0,84 | 17,42 |
| ALTRE | 282 | 0,18 | 126 | 0,08 | 123,81 | 1.966 | 0,16 | 960 | 0,08 | 104,79 |
| TOT.MARCHE EST. | 117.801 | 77,09 | 110.210 | 72,06 | 6,89 | 930.620 | 75,31 | 926.457 | 72,69 | 0,45 |
| TOT.MERCATO | 152.800 | 100,00 | 152.949 | 100,00 | -0,10 | 1.235.698 | 100,00 | 1.274.598 | 100,00 | -3,05 |

Elaborazioni ANFIA su dati del Ministero dei Trasporti/Prepared by Anfia from the data of Ministry of Transportations (Aut. Min. D07161/HA)

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/07/2019

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> | LUGLIO 2019 <i>JULY 2019</i> |
|----|----------------------|-------------------------|---------------------------------|
| 1 | FIAT | PANDA | 10.687 |
| 2 | LANCIA | YPSILON | 4.315 |
| 3 | JEEP | RENEGADE | 4.257 |
| 4 | DACIA | SANDERO | 3.877 |
| 5 | FIAT | 500X | 3.275 |
| 6 | CITROEN | C3 | 3.196 |
| 7 | DACIA | DUSTER | 3.088 |
| 8 | VOLKSWAGEN | T-ROC | 3.066 |
| 9 | RENAULT | CLIO | 2.972 |
| 10 | JEEP | COMPASS | 2.959 |

Fonte: CED - Ministero dei Trasporti

| N. | MARCA <i>Make</i> | MODELLO <i>Model</i> | GEN/LUG 2018 <i>JAN/JUL 2018</i> |
|----|----------------------|-------------------------|-------------------------------------|
| 1 | FIAT | PANDA | 90.116 |
| 2 | LANCIA | YPSILON | 39.001 |
| 3 | RENAULT | CLIO | 29.595 |
| 4 | JEEP | RENEGADE | 28.515 |
| 5 | FIAT | 500X | 27.647 |
| 6 | DACIA | DUSTER | 27.531 |
| 7 | CITROEN | C3 | 27.485 |
| 8 | VOLKSWAGEN | T-ROC | 27.037 |
| 9 | FIAT | 500 ^c | 26.508 |
| 10 | VOLKSWAGEN | POLO | 24.127 |

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

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/07/2019

^c Comprende la versione Abarth

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