Press Release

A DOWNWARD RETURN FOR THE CAR INDUSTRY IN MAY: -1.2%, DESPITE BENEFITING FROM AN EXTRA WORKING DAY

The measures introduced by the Ecobonus are pushing this sector (electric cars and rechargeable hybrids) which could by the end of the year represent between 1% and 2% of the total sales market, despite an infrastructure that is still severely lacking

Turin, 3rd June 2019 – According to data published today by the Ministry of Infrastructure and Transport, the Italian car market in May recorded 197,307 new registrations which was 1.2% down on the same month in 2018.

As a result, volumes registered in the first five months of 2019 were 910,093 units, 3.8% fewer than in the same period of 2018.

"After a slight recovery in April (+1.5%), the Italian car market returned to negative figures (-1.2%) even though it benefited from one more working day compared to the same month in 2018 (20 working days in May 2019 compared to 19 in May 2018), without which, the drop would probably have been greater – commented **Paolo Scudieri, President of ANFIA**.

Diesel car registrations have continued to fall into double digits during the month (-20% with 20,000 fewer units than in May 2018), with a share of 42% of the market, while the growing trend in petrol has continued (+22.5% with a market share of 44%). In the first five months of the year diesel sales have fallen by 24% while petrol driven cars have risen by 24%.

New registrations of electric cars in May 2019 (1,190 units sold, 0.6% of the total registered) are almost double those of May 2018, which in turn were four times those sold in May 2017. In the first five months of 2019 almost 3,600 electric cars were registered, twice as many as a year ago. Most of the rechargeable cars sold qualified for the Ecobonus.

Hybrid cars (including plug-ins) also grew in May (with a share of 5.4%, one and a half percentage points more than in May last year) and by 33% in the first 5 months. Among hybrids, rechargeable hybrids recorded the highest growth in the month (+53% and 480 units, compared to +35% and 10,000 units of the traditional hybrids). In the first quarter of 2019, Italy was ranked in second place in this market segment within the EU28+Efta.

The Ecobonus scheme is driving up this sector (electric cars and rechargeable hybrids) which by the end of the year could account for between 1% and 2% of the total market despite a still very poor infrastructure. If the funding for the scheme runs out before *the expiry date, then sales of rechargeable cars are likely to stop until the planned funding for 2020 becomes available".*

Moving on to the analysis by **fuel supply**[1], in May 2019, the growth trend in the number of registrations for petrol, LPG, hybrid and electric cars continued, while those for diesel and natural gas fell.

Alternative fuels represented 14.4% of the market in May and were up 8% in the month. In cumulative terms they accounted for 13.7% of all new registrations and were up by 7%.

LPG cars grew by 4% in the month and had a 6.5% share of the market and 5% cumulatively accounting for 6.6% of the market, while methane powered cars suffered another heavy drop in May of -31%, after the sharp drop of 50% in December, 46% in January, 54% in February, 36% in March and 27% in April. In the overall figures, the decline of natural gas cars represents -39%. In the month as a whole, gas-powered cars accounted for some 8.4% of the May market (6.5% for LPG and 1.9% for methane).

In terms of **market by segments**, in May 2019 the super-utility segment grew by 8% as most of their models were not affected by bonus-malus . Small SUVs also showed strong growth of +23%, while medium and compact SUVs were down. The small car segment was also down by 8% and the lower-medium car segment by 20%. Finally, despite the fact that these models are clearly affected by the bonus-malus , the segment for sports cars, luxury cars and large SUVs is growing.

Fiat Panda and Fiat 500 were the most sold cars in the super-utility segment. The two models together accounted for 57% of the segment's total. Fiat 500X and Jeep Renegade were the two best-selling SUVs on the market in May and, overall FCA Group's models represented one in five of all SUVs sold in total. Fiat 500L was the best-selling MPV in the month and represented 30% of total MPV sales.

According to the ISTAT survey, in May **consumer confidence index** (base 2010=100), following three consecutive months of decline, rose again from 110.6 to 111.8. The composite index of business confidence (Iesi) also showed a positive trend, rising from 98.8 to 100.2.

In terms of **consumer confidence**, the index for current purchasing opportunities for durable goods, which include cars has also risen since April (from -58.5 to -46.5).

According to preliminary ISTAT estimates, the **national consumer price index** rose in May by 0.1% in monthly terms and by 0.9% in annual terms (compared with +1.1% in the previous month). The slowdown was mainly due to the trend in the prices of

[1] Provisional Data

transportation services (from +2.8% in April to +1.6%) and non-regulated energy goods (from +3.7% to +2.4%).

In the Unregulated Energy Goods sector this slowdown was caused by Diesel prices (from +4.5% to +2.9% in trend terms, +1.2% in the economic situation), while the slowdown in Petrol prices was more contained with a growth from +1.6% to +1.5% in trend terms (+2.3% compared to the previous month).

Overall, **domestic manufacturers** accounted for 52,273 new registrations (-6%) in the month and had a market share of 26.5%. In cumulative terms, total registrations since the beginning of 2019 have been 230,665 units (-11.8%) with a market share of 25.3%.

FCA brands (excluding Ferrari and Maserati) totalled 51,798 registrations in the month (-6.1%), with a market share of 26.2%. There was a positive trend for the Lancia/Chrysler brand (+20.1%). Lamborghini also performed well with an increase of 182.3%.

In the first five months of 2019 FCA brands totalled 228,147 registered cars representing a drop of 12.1% and a market share of 25.1%. The cumulative results since the beginning of the year have been favourable for the Lancia/Chrysler brand (+31%), flanked by Ferrari (+32.4%) and Lamborghini (+96%).

Six Italian models were in **the top ten** in May, with the Fiat Panda still in first place (13,631 units), followed in second place by the Fiat 500 (6,361), which rose two places, and in fourth place by Lancia Ypsilon (6,090). In fifth place was the Fiat 500X (3,938) which climbed five places. Sixth place was taken by Jeep Renegade (5,263) and ninth place by Fiat 500L (4,345).

The **used car market** saw a total of 373,676 transfers of ownership gross of mini-transactions to dealers in May 2019 with a 7.5% drop compared to May 2018. In the first five months of 2019, transfers of ownership were 1,854,525 and were 4.8% fewer than in 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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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*	**2019**	*%*	**2018**	*%*	*19/18*	**2019**	*%*	**2018**	*%*	*19/18*
FCA	51.798	*26,25*	55.160	*27,62*	*-6,09*	228.147	*25,07*	259.539	*27,42*	*-12,10*
FIAT	34.900	*17,69*	35.402	*17,73*	*-1,42*	147.323	*16,19*	172.409	*18,22*	*-14,55*
ALFA ROMEO	2.348	*1,19*	4.789	*2,40*	*-50,97*	11.846	*1,30*	23.629	*2,50*	*-49,87*
LANCIA/CHRYSLER	6.090	*3,09*	5.070	*2,54*	*20,12*	30.333	*3,33*	23.162	*2,45*	*30,96*
JEEP	8.460	*4,29*	9.899	*4,96*	*-14,54*	38.645	*4,25*	40.339	*4,26*	*-4,20*
FERRARI	42	*0,02*	45	*0,02*	*-6,67*	233	*0,03*	176	*0,02*	*32,39*
MASERATI	196	*0,10*	222	*0,11*	*-11,71*	923	*0,10*	1.244	*0,13*	*-25,80*
LAMBORGHINI	48	*0,02*	17	*0,01*	*182,35*	147	*0,02*	75	*0,01*	*96,00*
ALTRE NAZIONALI	189	*0,10*	143	*0,07*	*32,17*	1.215	*0,13*	484	*0,05*	*151,03*
TOT. MARCHE NAZ.	**52.273**	*26,49*	**55.587**	*27,84*	*-5,96*	**230.665**	*25,35*	**261.518**	*27,63*	*-11,80*
AUDI	6.738	*3,41*	6.497	*3,25*	*3,71*	28.579	*3,14*	31.225	*3,30*	*-8,47*
BMW	5.544	*2,81*	5.258	*2,63*	*5,44*	27.216	*2,99*	27.238	*2,88*	*-0,08*
CITROEN/DS	9.018	*4,57*	8.406	*4,21*	*7,28*	46.155	*5,07*	44.796	*4,73*	*3,03*
DACIA	8.956	*4,54*	6.304	*3,16*	*42,07*	39.973	*4,39*	28.447	*3,01*	*40,52*
FORD	11.908	*6,04*	12.797	*6,41*	*-6,95*	57.823	*6,35*	65.649	*6,94*	*-11,92*
HONDA	848	*0,43*	821	*0,41*	*3,29*	4.148	*0,46*	4.403	*0,47*	*-5,79*
HYUNDAI	4.657	*2,36*	5.285	*2,65*	*-11,88*	20.773	*2,28*	23.774	*2,51*	*-12,62*
JAGUAR	593	*0,30*	902	*0,45*	*-34,26*	4.071	*0,45*	4.385	*0,46*	*-7,16*
KIA	4.009	*2,03*	4.793	*2,40*	*-16,36*	21.337	*2,34*	22.789	*2,41*	*-6,37*
LAND ROVER	1.172	*0,59*	1.656	*0,83*	*-29,23*	7.592	*0,83*	9.205	*0,97*	*-17,52*
MAHINDRA	84	*0,04*	54	*0,03*	*55,56*	498	*0,05*	137	*0,01*	*263,50*
MAZDA	995	*0,50*	874	*0,44*	*13,84*	5.333	*0,59*	5.230	*0,55*	*1,97*
MERCEDES	6.003	*3,04*	6.258	*3,13*	*-4,07*	27.807	*3,06*	29.184	*3,08*	*-4,72*
MINI	2.086	*1,06*	2.009	*1,01*	*3,83*	9.662	*1,06*	9.607	*1,02*	*0,57*
MITSUBISHI	921	*0,47*	455	*0,23*	*102,42*	3.585	*0,39*	2.039	*0,22*	*75,82*
NISSAN	3.983	*2,02*	5.218	*2,61*	*-23,67*	21.717	*2,39*	29.631	*3,13*	*-26,71*
OPEL	10.688	*5,42*	10.121	*5,07*	*5,60*	51.065	*5,61*	46.502	*4,91*	*9,81*
PEUGEOT	10.253	*5,20*	10.418	*5,22*	*-1,58*	54.027	*5,94*	53.871	*5,69*	*0,29*
PORSCHE	924	*0,47*	696	*0,35*	*32,76*	2.731	*0,30*	2.507	*0,26*	*8,93*
RENAULT	13.000	*6,59*	15.176	*7,60*	*-14,34*	52.817	*5,80*	60.854	*6,43*	*-13,21*
SEAT	2.865	*1,45*	2.154	*1,08*	*33,01*	12.439	*1,37*	10.557	*1,12*	*17,83*
SKODA	2.898	*1,47*	2.473	*1,24*	*17,19*	12.266	*1,35*	12.297	*1,30*	*-0,25*
SMART	2.409	*1,22*	2.989	*1,50*	*-19,40*	11.140	*1,22*	11.600	*1,23*	*-3,97*
SSANGYONG	215	*0,11*	211	*0,11*	*1,90*	1.185	*0,13*	1.073	*0,11*	*10,44*
SUBARU	218	*0,11*	309	*0,15*	*-29,45*	1.030	*0,11*	1.351	*0,14*	*-23,76*
SUZUKI	3.485	*1,77*	3.222	*1,61*	*8,16*	16.650	*1,83*	15.236	*1,61*	*9,28*
TOYOTA	8.940	*4,53*	8.503	*4,26*	*5,14*	42.326	*4,65*	41.083	*4,34*	*3,03*
LEXUS	773	*0,39*	507	*0,25*	*52,47*	2.522	*0,28*	1.774	*0,19*	*42,16*
VOLKSWAGEN	18.880	*9,57*	17.973	*9,00*	*5,05*	82.633	*9,08*	80.272	*8,48*	*2,94*
VOLVO	1.764	*0,89*	1.680	*0,84*	*5,00*	9.235	*1,01*	7.482	*0,79*	*23,43*
ALTRE	207	*0,10*	86	*0,04*	*140,70*	1.093	*0,12*	665	*0,07*	*64,36*
TOT.MARCHE EST.	**145.034**	*73,51*	**144.105**	*72,16*	*0,64*	**679.428**	*74,65*	**684.863**	*72,37*	*-0,79*
TOT.MERCATO	**197.307**	*100,00*	**199.692**	*100,00*	*-1,19*	**910.093**	*100,00*	**946.381**	*100,00*	*-3,83*

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 31/05/2019

ITALIA - IMMATRICOLAZIONI AUTOVETTURE - Top ten

ITALY - NEW CAR REGISTRATIONS - Top ten

dati provvisori/*provisional data*

TOP 10

N.	MARCA *Make*	MODELLO *Model*	MAGGIO 2019 *MAY 2019*
1	FIAT	PANDA	13.631
2	FIAT	500[1]	6.361
3	RENAULT	CLIO	6.192
4	LANCIA	YPSILON	6.090
5	FIAT	500X	5.503
6	JEEP	RENEGADE	5.263
7	DACIA	DUSTER	4.372
8	FIAT	500L	4.345
9	VOLKSWAGEN	T-ROC	4.020
10	CITROEN	C3	3.947

Fonte: CED - Ministero dei Trasporti

N.	MARCA *Make*	MODELLO *Model*	GEN/MAG 2018 *JAN/MAY 2018*
1	FIAT	PANDA	68.121
2	LANCIA	YPSILON	30.334
3	RENAULT	CLIO	21.973
4	FIAT	500[2]	21.924
5	FIAT	500X	21.110
6	CITROEN	C3	20.953
7	VOLKSWAGEN	T-ROC	20.389
8	DACIA	DUSTER	20.297
9	VOLKSWAGEN	POLO	19.365
10	JEEP	RENEGADE	19.116

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

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[1] Non comprende la versione Abarth.

[2] Comprende la versione Abarth

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