

Press Release

DOWNWARD SPIRAL OF THE CAR MARKET IN MARCH: -9.6%

After the slight recovery in February there has been a worrying downward trend contributed in part by the ongoing operational difficulties in implementing the bonus

Turin, 1st April 2019 - According to data published today by the Ministry of Infrastructure and Transport, in March the Italian car market totalled 193,662 registrations, down 9.6% compared to the same month in 2018.

Volumes registered in the first quarter of 2019 thus amounted to 537,289 units, 6.5% less than the volumes registered in the same period of 2018.

"The car market - after the slight recovery in February (-2.4) that followed the -7.5 in January - March 2019 shows a worrying downward trend (-9.6%), which was also affected by one working day less (21 days in March 2019 compared to 22 in March 2018) - commented Paolo Scudieri, President of ANFIA.

This result is also affected by the continuing decline in the consumer confidence index, given also the negative forecasts on the performance of the Italian economy - the OECD has recently revised the economic growth forecasts for 2019 by downgrading it (-0.2%).

After growing by 19% in February, a month before the implementation of the bonus/malus, sales of "high-end" cars fell by 27% in March. The only segments to grow in the month were compact SUVs (+16%) and small MPVs (+7%). All other segments saw their markets decline in double-digits, except for a slight decline in small SUVs (-0.9%) and A-segments (-7%).

In the month, the number of registrations of petrol, LPG, hybrid and electric cars increased, whilst both diesel and natural gas cars continued to decrease.

Electric cars grow by 44% in March, after an increase of 3% in February which was held back by the waiting for the bonus. Despite this measure, which is still stagnant from an operational point of view and is clearly difficult for consumers and distribution networks, growth rates are significantly lower than those achieved in 2018, when there was a triple-digit increase for eight months. The electricity market, in March of this year, had a market share of 0.3% with around 630 units.

Hybrid cars (including plug-ins) finished March at +36% and the first quarter at +33%. Among the hybrids during the month, the traditional hybrids recorded a higher growth rate (+36%) compared to rechargeable hybrids (+19% and 443 units), although the latter enjoyed a higher incentive provided by the bonus".

National Association of Automotive Industry (ANFIA)

Moving on to the analysis of the **power supply market** ¹, in March 2019, diesel cars continued to fall by 25% (almost 30,000 fewer cars than in March 2018), with a 45% share, unlike petrol cars which were 10% higher and accounted for 41% of the market. In the first three months of the year diesel cars fell by 26%, while petrol cars increased by 22%.

Alternative-fuelled cars accounted for 13.6% of the March market and were up 5.5% in the month and, year to date account for 13.2% of the market, an increase of 4%.

LPG cars increased by 2% in the month and by 2.7% year to date, both with a 6.5% share, while methane cars suffered another significant drop in March of 36%. This was after the sharp drops of 50% in December 46% in January and 54% in February. In cumulative terms the decrease in the number of natural gas cars is 46%. Overall, in the month, alternative-fuelled passenger cars accounted for 7.9% of the March market (6.5% for LPG, 1.4% for methane).

The increase in registrations of electric and hybrid vehicles (including plug-ins) as already mentioned is accompanied by a drop in the market share of the latter: 5.6% in the month, compared to 3.7% in March last year.

In terms of **market segment**, in March 2019 Fiat Panda and Fiat 500 were the best-selling cars in the super utility segment. The two models combined had a market share of 56% in the segment, while Lancia Ypsilon was the best-selling car in the small car segment. Fiat 500X was the top-selling SUV in March, while the Alfa Romeo Stelvio was the top-selling of the medium SUVs. Overall, FCA Group models accounted for 19% of the SUV market for all sizes in the third month of the year. Fiat 500L was the bestselling MPV in March 2019 and accounted for one third of total MPV sales.

According to the ISTAT survey, the **consumer confidence index** (base 2010=100) fell from 112.4 to 111.2 in March. The **composite index of business confidence** (lesi), on the other hand showed a positive upward trend rising from 98.2 to 99.2.

With reference to consumer confidence, as regards to durable goods for which the automobile is one, the index relative to current purchase opportunities has also fallen compared to February (from -47.8 to -51.7).

According to preliminary ISTAT estimates, in March the **national consumer price index** rose by 0.3% on a monthly basis and by 1.0% on an annual basis (same trend rate as in the previous month). The stability of inflation is the result of conflicting factors: on the one hand there was an acceleration in unregulated energy goods (from +0.8% to +3.3%), on the other there was a slowdown in the prices of unprocessed foodstuffs, transport services (from +0.9% to +0.4%) and tobacco products.

¹ Provisional data

In the Unregulated Energy Goods segment (monthly variation +1.6%) and when looking at the trend in fuel prices, the following can be seen: **Diesel** +2.6% in economic terms (from +1.7% to +5.3% in trend terms), and **Petrol** +2.4% compared to the previous month (with a turnaround from -3.0% to +0.3%).

National brands totalled 48,550 registrations in the month (-19.1%), with a market share of 25.1%. Cumulative registrations since the beginning of 2019 have totalled 133,721 units (-16.2%) with a market share of 24.9%.

FCA brands (excluding Ferrari and Maserati) totalled 48,052 registrations in the month (-19.3%), with a market share of 24.8%. Positive performance for the Lancia/Chrysler brand (+15.5%). There were also good results for Ferrari (+37%) and Lamborghini (+71.4%).

In the first quarter, FCA brands totalled 132,109 registered cars with a decrease of 16.6% and a market share of 24.6%. The first quarter ended positively with Lancia/Chrysler (+35%) and Jeep (+2.9%), alongside Ferrari (+51.1%) and Lamborghini (+94.9%).

Six Italian models were in the **top ten in February**, with the Fiat Panda (13,726 units) remaining in first place, followed by Lancia Ypsilon (6,080) in second place that remained stable, and Fiat 500X (4,662) in third place and rising four places. Fiat 500 (4,293) came seventh followed in ninth place by Jeep Compass (4,115) and in tenth place by Fiat 500L (4,091).

There were 380,227 transfers of ownership in the **used car market**, gross of miniature sales to dealers in March 2019, down 8.3% on March 2018. In the first quarter of 2019, transfers of ownership were 1,121,098 which was 5.4% lower than in the same period of 2018.

For more information: ANFIA Press Office
Miriam Gangi (Ms.) - m.gangi@anfia.it
Telephone: +39 011 5546502
Mobile: +39 338 7303167

National Association of Automotive Industry (ANFIA)



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.

www.anfia.it/it/

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National Association of Automotive Industry (ANFIA)

10128 Turin - Corso Galileo Ferraris, 61 - Phone: +39 011 5546511 - Fax: +39 011 545464 - E-mail: anfia@anfia.it -
00144 Rome - Viale Pasteur, 10 - Phone: +39 06 54221493 (4) - Fax: +39 06 54221418- E-mail: anfia.roma@anfia.it
www.anfia.it

ITALIA - IMMATRICOLAZIONI AUTOVETTURE

ITALY - NEW CAR REGISTRATIONS

dati provvisori/provisional data

MARCA/MAKE	MARZO MARCH				VAR. % % CHG. 19/18	GENNAIO/MARZO JANUARY/MARCH				VAR. % % CHG. 19/18
	2019	%	2018	%		2019	%	2018	%	
FCA	48.052	24,81	59.553	27,80	-19,31	132.109	24,59	158.345	27,55	-16,57
FIAT	31.632	16,33	40.281	18,80	-21,47	82.711	15,39	107.280	18,66	-22,90
ALFA ROMEO	2.433	1,26	5.376	2,51	-54,74	7.273	1,35	14.411	2,51	-49,53
LANCIA/CHRYSLER	6.080	3,14	5.266	2,46	15,46	18.507	3,44	13.704	2,38	35,05
JEEP	7.907	4,08	8.630	4,03	-8,38	23.618	4,40	22.950	3,99	2,91
FERRARI	37	0,02	27	0,01	37,04	139	0,03	92	0,02	51,09
MASERATI	128	0,07	279	0,13	-54,12	556	0,10	816	0,14	-31,86
LAMBORGHINI	24	0,01	14	0,01	71,43	76	0,01	39	0,01	94,87
ALTRE NAZIONALI	309	0,16	121	0,06	155,37	841	0,16	252	0,04	233,73
TOT. MARCHE NAZ.	48.550	25,07	59.994	28,00	-19,08	133.721	24,89	159.544	27,76	-16,19
AUDI	6.418	3,31	6.657	3,11	-3,59	16.198	3,01	18.861	3,28	-14,12
BMW	6.327	3,27	6.455	3,01	-1,98	16.904	3,15	16.822	2,93	0,49
CITROEN	9.885	5,10	10.028	4,68	-1,43	28.459	5,30	28.359	4,93	0,35
DACIA	8.653	4,47	4.786	2,23	80,80	22.484	4,18	17.831	3,10	26,10
FORD	12.296	6,35	15.535	7,25	-20,85	34.921	6,50	40.962	7,13	-14,75
HONDA	893	0,46	1.136	0,53	-21,39	2.550	0,47	2.814	0,49	-9,38
HYUNDAI	4.624	2,39	5.406	2,52	-14,47	12.327	2,29	13.981	2,43	-11,83
JAGUAR	659	0,34	1.265	0,59	-47,91	2.744	0,51	2.622	0,46	4,65
KIA	3.935	2,03	4.256	1,99	-7,54	12.487	2,32	12.751	2,22	-2,07
LAND ROVER	1.338	0,69	2.407	1,12	-44,41	5.202	0,97	6.086	1,06	-14,53
MAHINDRA	118	0,06	25	0,01	372,00	306	0,06	71	0,01	330,99
MAZDA	1.369	0,71	1.420	0,66	-3,59	3.500	0,65	3.573	0,62	-2,04
MERCEDES	6.300	3,25	7.529	3,51	-16,32	17.142	3,19	17.960	3,12	-4,55
MINI	2.226	1,15	2.069	0,97	7,59	5.825	1,08	5.574	0,97	4,50
MITSUBISHI	604	0,31	417	0,19	44,84	2.080	0,39	1.162	0,20	79,00
NISSAN	4.654	2,40	6.949	3,24	-33,03	13.300	2,48	19.818	3,45	-32,89
OPEL	10.959	5,66	11.095	5,18	-1,23	30.256	5,63	28.196	4,91	7,31
PEUGEOT	10.889	5,62	11.522	5,38	-5,49	33.546	6,24	33.903	5,90	-1,05
PORSCHE	390	0,20	372	0,17	4,84	1.018	0,19	1.495	0,26	-31,91
RENAULT	12.225	6,31	13.929	6,50	-12,23	30.345	5,65	33.365	5,80	-9,05
SEAT	2.804	1,45	2.468	1,15	13,61	7.013	1,31	6.334	1,10	10,72
SKODA	2.671	1,38	2.720	1,27	-1,80	6.979	1,30	7.334	1,28	-4,84
SMART	2.362	1,22	3.031	1,41	-22,07	5.612	1,04	6.424	1,12	-12,64
SSANGYONG	274	0,14	271	0,13	1,11	760	0,14	674	0,12	12,76
SUBARU	166	0,09	294	0,14	-43,54	683	0,13	791	0,14	-13,65
SUZUKI	2.835	1,46	2.772	1,29	2,27	9.749	1,81	9.120	1,59	6,90
TOYOTA	8.558	4,42	8.615	4,02	-0,66	25.132	4,68	24.896	4,33	0,95
LEXUS	736	0,38	585	0,27	25,81	1.326	0,25	1.063	0,18	24,74
VOLKSWAGEN	17.535	9,05	18.177	8,48	-3,53	48.415	9,01	47.846	8,32	1,19
VOLVO	2.103	1,09	1.879	0,88	11,92	5.687	1,06	4.126	0,72	37,83
ALTRE	306	0,16	186	0,09	64,52	618	0,12	445	0,08	38,88
TOT. MARCHE EST.	145.112	74,93	154.256	72,00	-5,93	403.568	75,11	415.259	72,24	-2,82
TOT. MERCATO	193.662	100,00	214.250	100,00	-9,61	537.289	100,00	574.803	100,00	-6,53

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 31/03/2019

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>	MARZO 2019 <i>MARCH 2019</i>
1	FIAT	PANDA	13.726
2	LANCIA	YPSILON	6.080
3	FIAT	500X	4.662
4	RENAULT	CLIO	4.564
5	DACIA	DUSTER	4.438
6	CITROEN	C3	4.342
7	FIAT	500 ¹	4.293
8	VOLKSWAGEN	T-ROC	4.247
9	JEEP	COMPASS	4.115
10	FIAT	500L	4.091

Fonte: CED - Ministero dei Trasporti

N.	MARCA <i>Make</i>	MODELLO <i>Model</i>	GEN/MAR 2018 <i>JAN/MAR 2018</i>
1	FIAT	PANDA	40.839
2	LANCIA	YPSILON	18.507
3	CITROEN	C3	13.272
4	VOLKSWAGEN	POLO	12.672
5	VOLKSWAGEN	T-ROC	12.461
6	JEEP	COMPASS	12.205
7	TOYOTA	YARIS	12.189
8	FIAT	500X	11.935
9	RENAULT	CLIO	11.927
10	DACIA	DUSTER	11.619

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

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¹ Con la versione Abarth, la Fiat 500 occuperebbe la terza posizione in classifica

Associazione Nazionale Filiera Industria Automobilistica

Sede di Torino: 10128 - Corso Galileo Ferraris, 61 - Tel. +39 011 5546511 - Fax +39 011 545464

Dir. Studi e Ricerche: Tel. +39 0115546524 - E-mail: studi.ricerche@anfia.it - www.anfia.it

Sede di Roma: 00144 - Viale Pasteur, 10 - Tel. +39 06 54221493 (4) - Fax +39 06 54221418 - E-mail: anfia.roma@anfia.it