Press release

A SLOW START TO THE YEAR IN JANUARY FOR THE EUROPEAN CAR MARKET: -7.4%

All five of the largest markets (including the UK), accounting for 68% of total registrations, were down more than the European average (-8.2%), with almost 69,000 fewer vehicles sold than in January 2019

Turin, 18th February 2020 – According to data released today by ACEA, in **all the countries of the European Union enlarged to include EFTA and the United Kingdom**[1] January car registrations totalled 1,135,116 units, representing a drop of 7.4% compared to January 2019.

"*In the first month of 2020, the European car market has begun to show negative signs* – states **Paolo Scudieri**, President of ANFIA. *The announced changes in passenger car taxation by some EU Member States for 2020 led to earlier purchases in December 2019, which resulted in lower sales in January. Other factors contributing to this downturn include the weakening of the global economy and the uncertainty caused by the UK's official exit from the EU on 1st February.*

In January 2020, demand for new cars fell in all the five major markets - including the UK - which accounted for 68% of the total number of cars registered and, overall, fell slightly more than the European average (-8.2%), with almost 69,000 fewer cars than in January 2019. France recorded the sharpest drop (-13.4%), followed by Spain (-7.6%), the UK (-7.3%), Germany (-7.3%) and Italy (-5.9%), which saw the lowest fall.

The contraction of diesel sales continued in the five largest markets in January 2020: a drop of 20% in January 2019, with a share of 29.6% compared to 34% in January 2019. Diesel vehicles decreased in all major markets, showing double-digit falls: -36% in the UK, -23.6% in Italy, -19.6% in France, -12.4% in Germany and -11.5% in Spain. Within the major markets, Italy maintained the highest share of diesel cars concerning its market, with 33.3%. However, on the other hand, there was strong growth in alternative fuels across the five markets, with shares reaching one-fifth of the market in Italy and France, 19% in the UK, 18% in Spain and 15.5% in Germany".

In **Italy,** total registrations in January amounted to 155,528 units (-5,9%).

According to preliminary data from ISTAT, the **National Consumer Price Index** rose by 0.2% on a monthly basis and 0.6% on an annual basis in January (from +0.5% in the previous month). This slight increase in inflation was mainly due to the prices of

[1] EU 27 + EFTA + United Kingdom (since 1st February 2020 the United Kingdom is no longer part of the European Union). Data for Malta is currently not available.

unregulated energy goods (which rose from +1.6% to +3.2%), transport services (from +1.1% to +2.9%) and processed food products.

Concerning unregulated energy goods, if we look at the performance of fuel prices, we can see that **diesel** prices rose rapidly from +0.3% to +3.8% in trend terms (+0.5% on a monthly basis), while **petrol** prices rose from +3.1% to +6.7% (+0.3% on a monthly basis), whilst **other fuels** continued to fall (from -7.6% to -4.0%, +1.5% on a monthly basis).

From the analysis of the **market in terms of fuel type**, diesel car registrations continued to fall, -24% with a 33% share, which is the lowest since February 2001. Petrol car sales reached 47%, with a drop of 2.4% in sales volumes. Meanwhile, alternative fuel cars in January represented 20% of the market (+38% growth in volumes), of which 2.1% were cars with zero or very low emissions (a total of 3,286 units). There was also three-digit growth for pure electric cars (+546%) and rechargeable hybrids (+278%).

Italian manufacturers recorded 68,036 new registrations in Europe in January (-6.4%), with a market share of 6% (5.9% in January 2019).

Spain achieved 86,443 new registrations in January (-7.6%).

ANFAC, the Spanish Association of Automobile and Truck Manufacturers, points out that sales of cars and SUVs maintained the same performance as they did at the end of 2019, with sales to companies remaining strong and the private sector showing a downturn, a trend that, for the moment, seems to be difficult to reverse. There is some concern that private households are still unwilling to buy a new car and prefer to buy much older vehicles, as shown by the increase in sales of used vehicles over 20 years of age (+17% in 2019). ANFAC, on the other hand, believes it is necessary to focus on fleet renewal to achieve the common objectives of combating climate change and reducing harmful emissions.

In detail, according to sales channels, the January market was divided as follows: 40,551 sales to private individuals (-14% and a 47% share), 32,785 sales to companies (+4.5% and a 38% share) and 13,107 sales for leasing (-12% and a 15% share).

According to fuel types, sales of diesel cars in the month fell by 11.5% compared to January 2019, with a share of 28%, while petrol cars fell by 17%, with a share of 54%. Finally, alternative fuel cars accounted for 18% of the month's market (+54%). Electric cars grew in January (+172% and 1.9% share), plug-in hybrids (+188% and 1.7% share), non-refillable hybrids (+55% and 13.5% share), while gas cars fell (-33% and 1.3% share).

In **France**, January saw 134,229 new registrations, down 13.4% on January 2019 when the same number of working days (22 days) were counted.

The used car market, according to CCFA forecasts, registered 503,635 units in January, an increase of 12.7% compared to the same month in 2019.

According to fuel type, in January diesel car registrations dropped by 20% and its share of the market stood at 31.7% (it was 34.2% in January 2019). Petrol cars, with 48.7% of the market, lost almost 9 points of the share compared to January 2019, with volumes down 27%. Lastly, alternative fuel cars reached almost 20% of the market in January, with 26,271 units (+116%), of which 10,952 were electric cars (+258% and 8.2% share), 3,734 plug-in hybrids (+226% and 2.8% share) and 11,513 traditional hybrids (+49% and 8.6% share).

The **German** market registered 246,300 new vehicles in January (-7.3%).

Sales to private individuals fell by 11.6% and accounted for 32% of the market share, while sales to companies fell by 5% and represented 68% of the total number.

January figures regarding fuel types posted a market share of 51.5% for petrol cars, with volumes down 17%, diesel cars with a 33% share (-12% in volumes) and alternative fuel cars with a 15.5% share. Sales of natural gas cars increased by 260%, with 882 registered units, while LPG cars fell by 95%. The number of hybrid cars sold was 30,805 and represented 12.5% of the market share, twice as much as in January 2019. Among hybrids, rechargeable cars accounted for 3.5% of the market and grew by 308% (8,639 units). Lastly, 7,492 pure electric cars were registered, up 61% and accounting for 3% of sales.

The average CO_2 emission of new cars registered in 2019 was 151.5 g/km.

Finally, the **British** market in January totalled 149,279 vehicles (-7.3%), in line with the forecasts of The Society of Motor Manufacturers & Traders, SMMT.

This association highlights that the new car market is a key sector of the UK's global economy and therefore another month in decline is very worrying. Consumer confidence is not improving and is not helped by the UK Government's decision to add further confusion and instability to the market by bringing forward the planned date for stopping the sale of internal combustion cars - including hybrids and plug-in hybrids - from 2040 to 2035. While ambition is understandable, given the need to address climate change and air quality concerns, general bans do not help consumer confidence in the short term. To be successful, the government must lead the transition with a comprehensive package of fiscal incentives, appropriate policies and investment to stimulate demand. Yet, at the moment, there is no clarity even about the future of plug-in car grant incentives - a key to driving the market electrification process - due to expire in sixty days amidst inadequate recharging facilities.

During the month, the total amount sold to private individuals was 41% of the market and down by 14%, while fleets were down by 2% and accounted for 57% of the market.

The diesel car market continued to shrink in January (-36% and the 34th consecutive decline), with the share falling to just under 20% (9 percentage points lower than in

January 2019). The market for new petrol-powered cars fell by 9.5% in January, with a 61.5% share and alternative fuel cars accounted for 19% of the market in the month (+109%). Registrations of battery-powered electric cars tripled compared to January 2019, while plug-in hybrid cars increased by 111%. The market for full-hybrid cars is up 21%, while sales of diesel (+721%) and petrol (+216%) mild-hybrid cars are booming. Refillable cars took 6% of the market and traditional hybrids 13%.

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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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UNIONE EUROPEA[1] - IMMATRICOLAZIONI AUTOVETTURE PER PAESE

EUROPEAN UNION [1] - NEW PASSENGER CAR REGISTRATIONS BY COUNTRY

	Gennaio/January		% Chg
	2020	2019	20/19
AUSTRIA	22.959	25.257	-9,1
BELGIUM	51.840	51.074	+1,5
BULGARIA	2.347	2.344	+0,1
CROATIA	3.709	3.565	+4,0
CYPRUS	1.166	1.021	+14,2
CZECH REPUBLIC	19.132	19.278	-0,8
DENMARK	18.671	21.312	-12,4
ESTONIA	2.271	2.186	+3,9
FINLAND	10.798	11.738	-8,0
FRANCE	134.229	155.079	-13,4
GERMANY	246.300	265.702	-7,3
GREECE	9.785	9.210	+6,2
HUNGARY	10.113	9.717	+4,1
IRELAND	31.206	32.370	-3,6
ITALY	155.528	165.271	-5,9
LATVIA	1.484	1.540	-3,6
LITHUANIA	4.238	3.136	+35,1
LUXEMBOURG	4.319	4.205	+2,7
NETHERLANDS	44.303	47.164	-6,1
POLAND	39.471	45.927	-14,1
PORTUGAL	14.423	15.684	-8,0
ROMANIA	12.489	13.952	-10,5
SLOVAKIA	6.733	7.096	-5,1
SLOVENIA	6.024	6.563	-8,2
SPAIN	86.443	93.538	-7,6
SWEDEN	16.798	20.478	-18,0
EUROPEAN UNION (EU)	**956.779**	**1.034.407**	**-7,5**
EU14[2]	847.602	918.082	-7,7
EU12[3]	109.177	116.325	-6,1
ICELAND	*709*	*847*	*-16,3*
NORWAY	*9.561*	*9.004*	*+6,2*
SWITZERLAND	*18.788*	*20.931*	*-10,2*
EFTA	29.058	30.782	-5,6
UNITED KINGDOM	149.279	161.013	-7,3
TOTAL (EU + EFTA + UK)	**1.135.116**	**1.226.202**	**-7,4**
WESTERN EUROPE (EU14 + EFTA + UK)	1.025.939	1.109.877	-7,6

SOURCE: **NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS**

[1] *Data for Malta n.a.*

[2] *Member States before the 2004 enlargement*

EU 27[1] - IMMATRICOLAZIONI AUTOVETTURE PER MARCA

EU 27[1] - NEW PASSENGER CAR REGISTRATIONS BY MAKE

dati provvisori/provisional data

	Gennaio/January				
	%[2] 2020	%[2] 2019	Unità *Units* 2020	Unità *Units* 2019	Var % % Chg 20/19
VW Group	**26,6**	**24,7**	**254.872**	**255.894**	**-0,4**
VOLKSWAGEN	12,2	12,1	117.135	125.367	-6,6
SKODA	5,5	5,2	52.726	53.473	-1,4
AUDI	4,9	4,2	46.660	43.851	+6,4
SEAT	3,5	2,9	33.455	30.299	+10,4
PORSCHE	0,5	0,3	4.570	2.591	+76,4
OTHERS[2]	0,0	0,0	326	313	+4,2
PSA Group	**16,6**	**17,6**	**158.719**	**182.284**	**-12,9**
PEUGEOT	7,2	7,3	68.626	75.035	-8,5
CITROEN	4,6	4,6	44.272	47.328	-6,5
OPEL/VAUXHALL	4,3	5,5	41.239	56.885	-27,5
DS	0,5	0,3	4.582	3.036	+50,9
RENAULT Group	**9,6**	**10,6**	**91.912**	**109.828**	**-16,3**
RENAULT	6,6	6,6	62.938	67.935	-7,4
DACIA	3,0	4,0	28.743	41.176	-30,2
LADA	0,0	0,0	183	314	-41,7
ALPINE	0,0	0,0	48	403	-88,1
HYUNDAI Group	**7,0**	**6,5**	**67.051**	**66.721**	**+0,5**
HYUNDAI	3,8	3,6	36.279	37.544	-3,4
KIA	3,2	2,8	30.772	29.177	+5,5
FCA Group	**6,7**	**6,6**	**64.148**	**68.743**	**-6,7**
FIAT	4,7	4,4	44.652	45.749	-2,4
JEEP	1,0	1,1	9.961	11.620	-14,3
LANCIA/CHRYSLER	0,7	0,6	6.252	6.627	-5,7
ALFA ROMEO	0,3	0,4	3.030	4.304	-29,6
OTHERS[3]	0,0	0,0	253	443	-42,9
BMW Group	**6,4**	**5,6**	**61.244**	**58.208**	**+5,2**
BMW	5,4	4,5	51.218	46.977	+9,0
MINI	1,0	1,1	10.026	11.231	-10,7
TOYOTA Group	**6,3**	**5,2**	**60.355**	**53.805**	**+12,2**
TOYOTA	5,9	4,9	56.890	51.031	+11,5
LEXUS	0,4	0,3	3.465	2.774	+24,9
DAIMLER	**5,5**	**5,6**	**52.363**	**58.413**	**-10,4**
MERCEDES	5,4	5,0	51.628	51.694	-0,1
SMART	0,1	0,6	735	6.719	-89,1
FORD	**4,8**	**5,8**	**46.258**	**59.871**	**-22,7**
NISSAN	**2,4**	**2,3**	**22.831**	**23.817**	**-4,1**
VOLVO CAR CORP.	**1,8**	**2,0**	**17.331**	**21.174**	**-18,1**
MAZDA	**1,1**	**1,5**	**10.918**	**15.645**	**-30,2**
MITSUBISHI	**1,0**	**0,9**	**9.377**	**9.267**	**+1,2**
JAGUAR LAND ROVER Group	**0,7**	**0,8**	**7.109**	**8.156**	**-12,8**
LAND ROVER	0,5	0,5	5.206	5.291	-1,6
JAGUAR	0,2	0,3	1.903	2.865	-33,6
HONDA	**0,5**	**0,6**	**4.923**	**6.050**	**-18,6**

SOURCE: **ACEA MEMBERS**

[1] ACEA estimation based on total by market

[2] Includes Bentley, Lamborghini and Bugatti

[3] Includes Dodge and Maserati

EUROPA (EU27[1]+EFTA+UK) - IMMATRICOLAZIONI AUTOVETTURE PER MAR

EUROPE (EU27[1] +EFTA+UK) - NEW PASSENGER CAR REGISTRATIONS BY MAK

dati provvisori/provisional data

	Gennaio/January				
	%[2] 2020	%[2] 2019	Unità *Units* 2020	Unità *Units* 2019	Var % % Chg 20/19
VW Group	**26,2**	**24,3**	**297.631**	**297.973**	**-0,1**
VOLKSWAGEN	11,8	11,6	133.616	142.800	-6,4
AUDI	5,1	4,4	58.440	53.841	+8,5
SKODA	5,2	5,0	59.581	60.998	-2,3
SEAT	3,5	3,0	39.856	36.498	+9,2
PORSCHE	0,5	0,3	5.553	3.315	+67,5
OTHERS[2]	0,1	0,0	585	521	+12,3
PSA Group	**15,7**	**16,9**	**177.826**	**206.666**	**-14,0**
PEUGEOT	6,5	6,7	74.297	81.829	-9,2
OPEL/VAUXHALL	4,5	5,7	51.004	69.751	-26,9
CITROEN	4,2	4,2	47.592	51.722	-8,0
DS	0,4	0,3	4.933	3.364	+46,6
RENAULT Group	**8,6**	**9,6**	**98.045**	**117.273**	**-16,4**
RENAULT	5,9	5,9	67.320	72.138	-6,7
DACIA	2,7	3,6	30.475	44.393	-31,4
LADA	0,0	0,0	183	314	-41,7
ALPINE	0,0	0,0	67	428	-84,3
HYUNDAI Group	**7,0**	**6,7**	**79.458**	**82.719**	**-3,9**
HYUNDAI	3,7	3,6	41.527	44.679	-7,1
KIA	3,3	3,1	37.931	38.040	-0,3
BMW Group	**6,8**	**6,0**	**76.881**	**74.098**	**+3,8**
BMW	5,6	4,8	64.123	59.172	+8,4
MINI	1,1	1,2	12.758	14.926	-14,5
TOYOTA Group	**6,3**	**5,3**	**71.877**	**65.279**	**+10,1**
TOYOTA	5,9	5,0	66.851	61.383	+8,9
LEXUS	0,4	0,3	5.026	3.896	+29,0
FCA Group	**6,0**	**5,9**	**68.036**	**72.694**	**-6,4**
FIAT	4,2	3,9	47.225	48.254	-2,1
JEEP	1,0	1,0	10.809	12.361	-12,6
LANCIA/CHRYSLER	0,6	0,5	6.252	6.631	-5,7
ALFA ROMEO	0,3	0,4	3.395	4.886	-30,5
OTHERS[3]	0,0	0,0	355	562	-36,8
DAIMLER	**5,8**	**6,0**	**65.889**	**73.327**	**-10,1**
MERCEDES	5,7	5,4	65.020	65.973	-1,4
SMART	0,1	0,6	869	7.354	-88,2
FORD	**5,5**	**6,3**	**62.978**	**77.365**	**-18,6**
NISSAN	**2,8**	**2,6**	**31.842**	**32.008**	**-0,5**
VOLVO CAR CORP.	**2,0**	**2,2**	**23.099**	**27.073**	**-14,7**
JAGUAR LAND ROVER Group	**1,4**	**1,3**	**15.438**	**16.460**	**-6,2**
LAND ROVER	1,0	0,9	11.094	11.300	-1,8
JAGUAR	0,4	0,4	4.344	5.160	-15,8
MAZDA	**1,2**	**1,5**	**13.397**	**18.961**	**-29,3**
MITSUBISHI	**1,0**	**0,9**	**11.416**	**11.280**	**+1,2**
HONDA	**0,7**	**0,8**	**8.176**	**10.151**	**-19,5**

SOURCE: **ACEA MEMBERS**

[1] *ACEA estimation based on total by market*

[2] *Includes Bentley, Lamborghini and Bugatti*

[3] *Includes Dodge and Maserati*

ANFIA
Associazione Nazionale Filiera Industria Automobilistica

EUROPA OCC.[1] (EU14+EFTA+UK) - IMMATRICOLAZIONI AUTOVETTURE PER

WESTERN EUROPE [1] (EU14+EFTA+UK) - NEW PASSENGER CAR REGISTRATION

dati provvisori/provisional data

	Gennaio/January				
	%[2] 2020	%[2] 2019	Unità *Units* 2020	Unità *Units* 2019	Var % % Chg 20/19
VW Group	**25,5**	**23,7**	**261.139**	**262.784**	**-0,6**
VOLKSWAGEN	11,8	11,7	121.169	130.061	-6,8
AUDI	5,5	4,7	56.108	51.996	+7,9
SKODA	3,9	3,8	40.413	42.305	-4,5
SEAT	3,7	3,1	37.621	34.744	+8,3
PORSCHE	0,5	0,3	5.276	3.197	+65,0
OTHERS[2]	0,1	0,0	552	481	+14,8
PSA Group	**16,5**	**17,5**	**169.174**	**194.026**	**-12,8**
PEUGEOT	6,9	7,0	70.879	77.779	-8,9
OPEL/VAUXHALL	4,7	5,7	48.361	63.804	-24,2
CITROEN	4,4	4,4	45.075	49.128	-8,2
DS	0,5	0,3	4.859	3.315	+46,6
RENAULT Group	**8,6**	**9,3**	**87.949**	**103.509**	**-15,0**
RENAULT	6,1	6,0	62.538	66.528	-6,0
DACIA	2,5	3,3	25.170	36.381	-30,8
LADA	0,0	0,0	177	173	+2,3
ALPINE	0,0	0,0	64	427	-85,0
BMW Group	**7,1**	**6,4**	**73.245**	**70.819**	**+3,4**
BMW	5,9	5,1	60.769	56.185	+8,2
MINI	1,2	1,3	12.476	14.634	-14,7
HYUNDAI Group	**6,6**	**6,5**	**68.157**	**72.071**	**-5,4**
HYUNDAI	3,4	3,5	34.972	38.567	-9,3
KIA	3,2	3,0	33.185	33.504	-1,0
DAIMLER	**6,1**	**6,4**	**62.736**	**70.834**	**-11,4**
MERCEDES	6,0	5,7	61.895	63.531	-2,6
SMART	0,1	0,7	841	7.303	-88,5
FCA Group	**6,1**	**6,1**	**62.352**	**68.080**	**-8,4**
FIAT	4,2	4,0	42.619	44.925	-5,1
JEEP	1,0	1,0	9.935	11.319	-12,2
LANCIA/CHRYSLER	0,6	0,6	6.251	6.627	-5,7
ALFA ROMEO	0,3	0,4	3.205	4.687	-31,6
OTHERS[3]	0,0	0,0	342	522	-34,5
TOYOTA Group	**5,8**	**5,1**	**59.456**	**56.099**	**+6,0**
TOYOTA	5,4	4,8	55.083	52.867	+4,2
LEXUS	0,4	0,3	4.373	3.232	+35,3
FORD	**5,8**	**6,5**	**59.417**	**72.199**	**-17,7**
NISSAN	**2,9**	**2,7**	**29.752**	**29.836**	**-0,3**
VOLVO CAR CORP.	**2,1**	**2,3**	**21.933**	**25.843**	**-15,1**
JAGUAR LAND ROVER Group	**1,5**	**1,4**	**14.897**	**16.020**	**-7,0**
LAND ROVER	1,0	1,0	10.717	10.978	-2,4
JAGUAR	0,4	0,5	4.180	5.042	-17,1
MAZDA	**1,2**	**1,5**	**12.202**	**16.583**	**-26,4**
MITSUBISHI	**1,0**	**0,9**	**10.491**	**10.343**	**+1,4**
HONDA	**0,7**	**0,8**	**6.867**	**8.751**	**-21,5**

SOURCE: **ACEA MEMBERS**

[1] *ACEA estimation based on total by market*

[2] *Includes Bentley, Lamborghini and Bugatti*

[3] *Includes Dodge and Maserati*