



Press Release

THE CAR MARKET IS STABLE (-0.4%) IN AUGUST AFTER 7 MONTHS IN ROW IN SLOWDOWN

The satisfaction of ANFIA for the measures introduced in terms of incentives for the car market, while it remains the need to restart the light commercial vehicles market. The goal now is to collaborate equally effectively with the Government on a package of structural measures for the automotive sector to propose to access the Recovery Fund resources

Turin, September 1st 2020 - According to the data published today by the Minister of Infrastructures and Transport, in August the Italian car market reached 88,801 registrations, the 0.4% less respect to the same month of 2019.

The final balance for the first eight months of 2020 counts 809,655 registrations, in slowdown of 39% respect to the volumes of the same period of 2019.

"For the first time since the beginning of the year, in August, the Italian car market is stable (-0.4%), after the strong double-digit decrease registered for five months in row, from March to July- says Paolo Scudieri, President of ANFIA.

For sure it is a first positive sign for a step by step recover of the Automotive sector, with market results in progressive improvement from here since the end of the year.

With the 'August' Decree Law, the fund which finances the Ecobonus measure has been further increased by 400 million euros for 2020, of which 300 million euros have been allocated exclusively to the incentive measure provided by the previous Relaunch Decree, modifying the subdivision of the ceiling for the various emission bands and, above all, introducing the new 61-90 g/Km CO₂ band. In this way, the push to dispose of the stock of cars accumulated in the months of lockdown is combined with the attention to the renewal of the circulating fleet in the sign of environmental sustainability, according to the European dictate.

However, it remains necessary to plan a measure to restart the light commercial vehicles market as well - a sector which is suffering, and in the peak months of the Covid-19 emergency, recorded a surge in last mile deliveries, underscoring the centrality of efficient urban freight mobility - by inserting an ad hoc ceiling in the process of converting the 'August' Decree into law.

In conclusion - continues Scudieri - ANFIA can only be satisfied with the work of recent months alongside the Government and the measures introduced in terms of incentives for the automotive market. Now, the hope is to collaborate equally effectively on a package of structural measures for the automotive sector to be proposed to access the resources of the Recovery Fund, an opportunity not to be missed to promote the ecological, energy and digital transition of the country".

Italian Association of Automotive Industry (ANFIA)

Analyzing registrations by **fueling**¹, in August goes on the slowdown of the traditional powers, while the trend stays positive for the electrified cars.

Diesel cars in August reduced of 18% representing the 35% of the market, the same share of the first 8 months of 2020 (7 points less respect to the same period of 2019), against registrations at -48%. **Petrol** cars decrease of 18% during the month of the 42% in the cumulate, representing the 36% of August market and of 42% of the total registered from January to August. The sales of **Alternative powered** cars is growing the overall, which reach during the month the 29% of share, in increase of 57%, while reduced of 4% during the first eight months of 2020 representing the 23% of the overall of the market, 8 percentage points more respect to the same period of 2019.

Another decrease for **Gas** powered cars: **GPL** with -33% in the month and -45% in the cumulate, reaching a share of 7% during the month and of 6% in the progressive 2020; in growth **methane** cars, +12% in August, with a share on the overall of the market of 2.8% and -14% in the first eight months of 2020, with a share of 2.4%.

Hybrid and electric cars keep to grow, +241% in August and +49% since the beginning of 2020. Among them, **mild and full hybrid** cars grow of 225% during the month, with a market share of 15%, and of 36.7% in the first eight month of 2020, with a share of 11% (more than double respect to the same period of 2019). The **Rechargeable** cars sold in August 2020 are the 320% more respect to August 2019, thanks to the strong positive variations both of the **electric** cars (+255% and 2.1% of share), and especially of **hybrid plug-in** (+433% and 1.8% of share), together they represent the 3.9% of the market in August and the 2.8% in the first eight months.

Also in August, the hybrid version of Panda is the best sold model among all the hybrid cars.

Referring to the **market by segments**, in August, supereconomy cars registrations are still in slowdown, -26% (the best sold cars are always Fiat Panda and Fiat 500, which together represent the 52% of the segment), while the economy cars see their market grow of 5% (at the first place Lancia Ypsilon). Medium cars register an increasement of 3% and the lower-medium of 4%, while the higher ones show a slightly contraction of 1%. In slowdown medium SUVs, which lost the 5% of the market, while grow the other sizes SUVs: small SUVs of 18% (at the first place Fiat 500X and at the third Jeep Renegade), compacted SUVs of 7% (at the first place Jeep Compass) and in the end the big SUVs of 36%, respect to August 2019. In the overall, SUVs register a trend of increase of 11.5% (the 19% of the SUVs registered belong to FCA Group) representing the 45% of the market during the month. The variation is negative also for the monovolumes registrations, which in August reduced of 6% in spite of the growth of the small

¹ Temporary Data

monovolumes (+21%). In the end, is registered also a slowdown of the higher (-2%), of the luxury (-45%) and of the sportive (-65%) cars.

In the first eight months of 2020, are in slowdown the all segments registrations.

According to the ISTAT survey, in August 2020 is expected a growth both of the **consumer confidence climate index** (base 2010=100), which goes from 100.1 to 100.8, both of the **composite index of the company confidence climate** (lesi), which grows from 77.0 to 80.8.

Referring to the consumer confidence climate, regarding the purchase of the long lasting goods and among them there is the car, the balance regarding the current opportunity is growth (from -67.8 to -61.7).

Also the **survey for the purchase of a new car in the next 12 months** by ISTAT shows in July, a percentage in growth for the positive responses respect to January 2020 (from 9% to 9.4%).

According to the ISTAT survey, in July the **national index of consumer prices** registers a growth of 0.3% per month and a decrease of 0.5% per year (from -0.4% of the previous month). The negative inflation keep to be determinate by the trend of the regulated energetic goods (stable with -13.6%) and of the not regulated ones (from -9% to -8.6%), while the growth of the decrease of the general index is mainly due to the sharper decrease in prices of the transport services (from -0.9% to -2.3%).

In this last sector looking at the fuel prices, **Diesel** prices goes from -12.1% to -11.7% in terms of trend (-0.2% the situation), **Petrol** ones from -11.1% to -10.8% (-0.2% per month), while the **other fuels** ones from -5.2% to -3.6% (-0.3% respect to July).

National brands, in the overall, reached during the month 20.630 registrations (-5.7%), with a market share of 23.2%. In the cumulate since the beginning of 2020, registrations in the overall reached 193,079 units (-41%), with a market share of 23.9%.

FCA brands (Maserati included) totalized in the overall 20,324 registrations during the month (-2.7%), with a market share of 22.9%. Positive trend also for Alfa Romeo (+14.1%) and Jeep (+8.3%).

In the first eight months of 2020, FCA brands totalized 190.795 registered cars, with a slowdown of 41% and a market share of 23.6%.

The Italian models **in the top ten of the best sold**, are five, with Fiat Panda (5,313 units) still at the first place - also in the progressive since the beginning of the year - followed by at the second place by, Fiat 500X (2,440), which gains a place and at the third by Lancia Ypsilon (2,261). At the fifth place is located Jeep Renegade (2,125),

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followed at the sixth by Jeep Compass (2,011), which gains four places respect to the previous month.

The second-hand market reached in August, 155,727 ownerships transfers, including the mini-transfer operations to car dealer, the 34.1% less respect to August 2019. In the first eight months of 2020 are registered 1,725,609 units, with a contraction of 38.2% respect to January-August 2019.

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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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The Automotive Production Chain in Italy

5.529 companies

274.000 employees (direct and indirect), more than 7% of the employees in the Italian manufacturing sector

105.9 billion Euros of turnover, which means 11% of the Italian manufacturing sector turnover and of 6.2% of the Italian GDP

76.3 billion Euros of tax levy of motorization

Italian Association of Automotive Industry (ANFIA)

ITALIA - IMMATRICOLAZIONI AUTOVETTURE

ITALY - NEW CAR REGISTRATIONS

dati provvisori/provisional data

MARCA/MAKE	AGOSTO AUGUST				VAR. % % CHG. 20/19	GENNAIO/AGOSTO JANUARY/AUGUST				VAR. % % CHG. 20/19
	2020	%	2019	%		2020	%	2019	%	
FCA	20.324	22,89	20.888	23,42	-2,70	190.795	23,56	323.321	24,39	-40,99
FIAT	12.219	13,76	13.036	14,62	-6,27	121.789	15,04	203.890	15,38	-40,27
ALFA ROMEO	1.326	1,49	1.162	1,30	14,11	9.875	1,22	17.744	1,34	-44,35
LANCIA	2.261	2,55	2.503	2,81	-9,67	24.670	3,05	41.505	3,13	-40,56
JEEP	4.480	5,04	4.137	4,64	8,29	33.741	4,17	58.688	4,43	-42,51
MASERATI	38	0,04	50	0,06	-24,00	720	0,09	1.494	0,11	-51,81
FERRARI	22	0,02	39	0,04	-43,59	377	0,05	386	0,03	-2,33
DR	275	0,31	941	1,06	-70,78	1.689	0,21	3.104	0,23	-45,59
LAMBORGHINI	7	0,01	11	0,01	-36,36	200	0,02	248	0,02	-19,35
ALTRE NAZIONALI	2	0,00	3	0,00	-33,33	18	0,00	23	0,00	-21,74
TOT. MARCHE NAZ.	20.630	23,23	21.882	24,54	-5,72	193.079	23,85	327.082	24,67	-40,97
AUDI	2.893	3,26	2.672	3,00	8,27	30.994	3,83	44.009	3,32	-29,57
BMW	2.539	2,86	2.781	3,12	-8,70	27.465	3,39	38.940	2,94	-29,47
CITROEN/DS	4.616	5,20	3.680	4,13	25,43	40.878	5,05	64.372	4,86	-36,50
DACIA	3.761	4,24	5.853	6,56	-35,74	31.058	3,84	62.047	4,68	-49,94
FORD	6.569	7,40	5.629	6,31	16,70	53.492	6,61	82.868	6,25	-35,45
HONDA	411	0,46	302	0,34	36,09	3.748	0,46	5.854	0,44	-35,98
HYUNDAI	3.163	3,56	2.278	2,55	38,85	20.884	2,58	31.973	2,41	-34,68
JAGUAR	155	0,17	291	0,33	-46,74	2.198	0,27	5.775	0,44	-61,94
KIA	2.552	2,87	2.310	2,59	10,48	22.016	2,72	31.910	2,41	-31,01
LAND ROVER	525	0,59	623	0,70	-15,73	7.376	0,91	11.179	0,84	-34,02
MAZDA	722	0,81	424	0,48	70,28	5.835	0,72	7.691	0,58	-24,13
MERCEDES	2.574	2,90	2.417	2,71	6,50	27.180	3,36	40.807	3,08	-33,39
MINI	934	1,05	760	0,85	22,89	9.444	1,17	14.187	1,07	-33,43
MITSUBISHI	286	0,32	348	0,39	-17,82	2.609	0,32	5.549	0,42	-52,98
NISSAN	2.080	2,34	1.671	1,87	24,48	15.828	1,95	29.979	2,26	-47,20
OPEL	3.725	4,19	4.548	5,10	-18,10	34.351	4,24	73.199	5,52	-53,07
PEUGEOT	5.278	5,94	4.867	5,46	8,44	48.913	6,04	76.702	5,79	-36,23
PORSCHE	274	0,31	239	0,27	14,64	3.852	0,48	4.289	0,32	-10,19
RENAULT	5.099	5,74	5.860	6,57	-12,99	47.764	5,90	81.132	6,12	-41,13
SEAT	1.568	1,77	1.324	1,48	18,43	13.265	1,64	18.416	1,39	-27,97
SKODA	1.648	1,86	1.388	1,56	18,73	14.954	1,85	18.712	1,41	-20,08
SMART	184	0,21	2.686	3,01	-93,15	2.083	0,26	18.319	1,38	-88,63
SSANGYONG	117	0,13	149	0,17	-21,48	775	0,10	1.729	0,13	-55,18
SUBARU	87	0,10	124	0,14	-29,84	1.195	0,15	1.676	0,13	-28,70
SUZUKI	1.865	2,10	1.461	1,64	27,65	17.461	2,16	25.728	1,94	-32,13
TESLA	195	0,22	113	0,13	72,57	1.596	0,20	1.508	0,11	5,84
TOYOTA	4.154	4,68	3.716	4,17	11,79	38.076	4,70	60.582	4,57	-37,15
LEXUS	236	0,27	253	0,28	-6,72	2.501	0,31	3.705	0,28	-32,50
VOLKSWAGEN	8.708	9,81	7.448	8,35	16,92	77.286	9,55	120.829	9,11	-36,04
VOLVO	1.115	1,26	894	1,00	24,72	10.227	1,26	13.446	1,01	-23,94
ALTRE	138	0,16	193	0,22	-28,50	1.272	0,16	1.510	0,11	-15,76
TOT.MARCHE EST.	68.171	76,77	67.302	75,46	1,29	616.576	76,15	998.622	75,33	-38,26
TOT.MERCATO	88.801	100,00	89.184	100,00	-0,43	809.655	100,00	1.325.704	100,00	-38,93

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 31/08/2020

ITALIA - IMMATICOLAZIONI AUTOVETTURE - Top ten
ITALY - NEW CAR REGISTRATIONS - Top ten

dati provvisori / *provisional data*

TOP 10

N.	MARCA <i>Make</i>	MODELLO <i>Model</i>	AGOSTO 2020 ¹ <i>AUGUST 2020¹</i>
1	FIAT	PANDA	5.313
2	FIAT	500X	2.440
3	LANCIA	YPSILON	2.261
4	FORD	PUMA	2.193
5	JEEP	RENEGADE	2.125
6	JEEP	COMPASS	2.011
7	DACIA	SANDERO	1.976
8	RENAULT	CAPTUR	1.757
9	VOLKSWAGEN	POLO	1.750
10	FORD	FIESTA	1.690

N.	MARCA <i>Make</i>	MODELLO <i>Model</i>	GEN/AGO 2020 <i>JAN/AUG 2020</i>
1	FIAT	PANDA	61.258
2	LANCIA	YPSILON	24.672
3	FIAT	500X	19.194
4	RENAULT	CLIO	18.705
5	FIAT	500 ²	17.916
6	JEEP	RENEGADE	17.229
7	VOLKSWAGEN	T-ROC	15.741
8	CITROEN	C3	15.031
9	OPEL	CORSA	15.002
10	VOLKSWAGEN	POLO	14.875

Fonte: CED - Ministero dei Trasporti

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/08/2020

¹ Con la versione Abarth, non compresa nella top10 del Ministero, Fiat 500 occuperebbe l'ottava posizione

² Comprende la versione Abarth

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