Press Release

A STRONG DECREASE IN DOUBLE-DIGIT ALSO IN JUNE FOR THE CAR MARKET (-23.1%)

With no incentives to the demand, there is the risk to count, at the end of 2020, only 1.2 million of new registrations, with a slowdown of 35% respect to 2019

Turin, July 1st 2020 – According to the data published today by the Minister of Infrastructures and Transport, in June the Italian car market totalized 132,457 registrations, the 23.1% less respect to the same month of 2019.

The summary of the first six months of 2020 counts 583,960 registrations, volumes almost split in the half respect to the same period of the previous year (-46.1%).

"There is still a strong double-digit decline also in June for the Italian car market– says **Paolo Scudieri, President of ANFIA**. *The loss has been split in half respect to the one of May and we are in front of weak restart signs, mainly due to the disposal of orders that have been accumulated and remained unfulfilled before the dealers closed last March, combined with calendar effects (one more working day in June 2020 compared to June 2019).*

The restart paces in sales after the lockdown period are and will be very slow because the economic crisis and climate of uncertainty represent a lethal mix for the purchasing decisions of consumers and businesses. To these, there is also the expected effect of the purchase incentives that have been talked about for months, but which, for now, have not been translated into reality, with a guilty delay compared to the other major European countries.

The current week should be determining for the process of conversion of the Relaunch Decree into Law, which should close within July 18th, that's why the hope is that our call could be finally heard. The stock of vehicles accumulated by manufacturers and dealers over the past few months, together with the current weak demand, are hindering the restart of industrial production in the automotive supply chain. Stimulating the market means restarting it, but also triggering a virtuous circle for the relaunch of the production levels of Italian industry as a whole and of the country system. In addition, the Treasury would also gain, because for every 100,000 lost registrations there is a shortfall in tax revenue of about 500 million Euros, not to mention that an industrial system that is recovering means less recourse to social shock absorbers.

With no stimuli to the market, at the end of 2020, there is the risk to count only 1.2 million of new car registered, with a loss of 35% respect to 2019. To avoid it, it is necessary apply measures in short terms: the expansion of the econobonus to the medium emissions of CO_2 car until 95 g/km; setting of a temporary premium for cars and commercial vehicles in stock (over 450,000 units), with simultaneous scrapping.

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In the end, the definition of a medium-long term industrial policy plan to safeguard the competitiveness of the Italian automotive sector is launched, accompanying it in the delicate technological transition underway with support for productive investments, R&D and human capital".

Analyzing registrations by **fueling**[1], in June, the strong decrease of the market include especially the traditional powers, while electrified vehicles show positive signs. During the month, diesel cars reduce of 35%, representing the 35% of the market, while, in the first six months of 2020, registrations are the 56% less respect to the ones of the same period of 2019 and their share is of 35%, 8 points less. Petrol cars decrease of 29% during the month and of 46% in the cumulate, representing the 40% of the June market and of 43% in the cumulate. Grow, instead, the alternative powered cars, which reach during the month a share of 25% and their volumes grow of 2.,5%, while decrease of 15% in the first three months. Since the beginning of the year, registrations of alternative powered cars represent the 22% of the overall, 8 percentage points more respect to the first half of 2019.

LPG cars slowdown of 19% during the month (reaching a share of 7%) and of 48% in the cumulate (with a share of 6%).

In decrease also methane cars, in slowdown of 11% in June, with a share on the market overall of 2.4%, and of 19% in the first six months of 2020, with a share of 2.3%.

In contrast to the rest of the market, grow the segment of the electric and of hybrid cars, +80.5% in June and +24% since the beginning of 2020. Among them hybrid-mild and full cars grow of 76% during the month, with a market share of 11%, and of 4% in the first six months of 2020, with a share of 11%, more than doubled respect to the same period of 2019. Rechargeable cars sold in June 2020 are the 104% more respect to June 2019, thanks to the strong positive variations of both electric cars (+52% and with 1.7% of share), and hybrid plug-in (+302% and 1.2% of share) and together represent the 3% of the overall registered. In the first six months 2020, electrics and rechargeable hybrids grow of 107% respect to the first six months of 2019.

Referring to the **market by segments**, also in June is registered a general slowdown, with the only exception of medium-large SUV. Registrations of super economy cars registrations decrease during the month of 35% (the best sold models are Fiat Panda and Fiat 500), while the ones of the economy ones register a slowdown of 17%. Medium cars see slowing down their market of 26%, with the lower-medium which decrease of 24% and the higher-medium of 33%. In slowdown also all size SUVs, which lose the 16% of the market (the 16% of the SUVs registrations is represented by the FCA Group), representing the 44% of the month market. In detail, small SUVs show a negative

[1] Temporary Data

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variation of 21% and the compacted ones of 17%, while the medium ones are in growth of 3% and the bigger ones of 16% (best performance for the second month in row). The variation is negative also for monovolumes registrations, that in June reduced of 39%. In the end, also the stronger decrease of the higher cars (-59%), luxury(-31%) and sportive ones (-51%). Also in the first six months of 2020, are in decrease all segments registrations.

According to the ISTAT survey, all data collected in June 2020 show an improvement, respect to May, both on the **consumer confidence climate index** (base 2010=100), which goes from 94.3 to 100.6, both on the **composite index of the company confidence climate** (Iesi), from 52.7 a 65.4.

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 increases (from -96.4 to -72.2).

According to the ISTAT survey, in June **the national index of consumer prices** registers a growth of 0.1% per month and a slowing down of 0.2% per year (as in the previous month). To define the negative inflation for the second month in row are the prices of the energetics goods (-12.1%), that, both in the regulated part (-14.1%) and in the not regulated one (-11.2%) confirm double-digit slowdown.

In this last sector, looking at the trend of fuels, **Diesel** prices go from -16.2% to -14-9% in the trend terms (+0.4% the situation), and the **Petrol** ones from -15.2% to -13.7% (+0.8% per month).

National brands, in the overall, reached during the month 29,520 registrations (-24.9%), with a market share of 22.3%. In the cumulate since the beginning of 2020, registrations in the overall reached 140,749 units (-47.9%), with a market share of 24.1%.

The Italian models **in the top ten of the best sold**, are five, in June, with Fiat Panda (9,107 units) always in the first place, followed at the third by Lancia Ypsilon (3,508) and at the sixth by Fiat 500X (3,079). At the eighth, Fiat 500 (2,739) followed at the tenth by Jeep Compass (2,462).

The **second-hand market** reached in June, 247,655 ownerships transfers, including the mini-transfer operations to car dealer, the 23,3% less respect to June 2019. In the first six months of 2020 are registered 1,296,260 units, with a contraction of 40.5% respect the period from January to June 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

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Comunicato Stampa

ITALIA - IMMATRICOLAZIONI AUTOVETTURE
ITALY - NEW CAR REGISTRATIONS

dati provvisori/*provisional data*

	GIUGNO *JUNE*				VAR. % *% CHG.*	GENNAIO/GIUGNO *JANUARY/JUNE*				VAR. % *% CHG.*
MARCA/*MAKE*	**2020**	*%*	**2019**	*%*	*20/19*	**2020**	*%*	**2019**	*%*	*20/19*
FCA	29.111	*21,98*	38.909	*22,58*	*-25,18*	139.233	*23,84*	268.082	*24,75*	*-48,06*
FIAT	18.561	*14,01*	23.295	*13,52*	*-20,32*	89.992	*15,41*	170.705	*15,76*	*-47,28*
ALFA ROMEO	1.525	*1,15*	2.559	*1,49*	*-40,41*	6.820	*1,17*	14.408	*1,33*	*-52,67*
LANCIA	3.508	*2,65*	4.350	*2,52*	*-19,36*	18.770	*3,21*	34.686	*3,20*	*-45,89*
JEEP	5.373	*4,06*	8.439	*4,90*	*-36,33*	23.099	*3,96*	47.092	*4,35*	*-50,95*
MASERATI	144	*0,11*	266	*0,15*	*-45,86*	552	*0,09*	1.191	*0,11*	*-53,65*
FERRARI	74	*0,06*	48	*0,03*	*54,17*	271	*0,05*	281	*0,03*	*-3,56*
DR	294	*0,22*	319	*0,19*	*-7,84*	1.088	*0,19*	1.551	*0,14*	*-29,85*
LAMBORGHINI	39	*0,03*	43	*0,02*	*-9,30*	145	*0,02*	190	*0,02*	*-23,68*
ALTRE NAZIONALI	2	*0,00*	7	*0,00*	*-71,43*	12	*0,00*	22	*0,00*	*-45,45*
TOT. MARCHE NAZ.	**29.520**	*22,29*	**39.326**	*22,82*	*-24,94*	**140.749**	*24,10*	**270.126**	*24,94*	*-47,90*
AUDI	5.847	*4,41*	6.650	*3,86*	*-12,08*	21.839	*3,74*	35.237	*3,25*	*-38,02*
BMW	4.627	*3,49*	5.206	*3,02*	*-11,12*	19.756	*3,38*	32.440	*2,99*	*-39,10*
CITROEN/DS	6.080	*4,59*	7.868	*4,57*	*-22,72*	30.815	*5,28*	54.053	*4,99*	*-42,99*
DACIA	6.393	*4,83*	8.532	*4,95*	*-25,07*	22.152	*3,79*	48.539	*4,48*	*-54,36*
FORD	8.866	*6,69*	9.834	*5,71*	*-9,84*	37.640	*6,45*	67.710	*6,25*	*-44,41*
HONDA	642	*0,48*	775	*0,45*	*-17,16*	2.693	*0,46*	4.928	*0,45*	*-45,35*
HYUNDAI	2.990	*2,26*	4.607	*2,67*	*-35,10*	13.420	*2,30*	25.419	*2,35*	*-47,20*
JAGUAR	257	*0,19*	680	*0,39*	*-62,21*	1.683	*0,29*	4.753	*0,44*	*-64,59*
KIA	2.989	*2,26*	4.196	*2,44*	*-28,77*	16.110	*2,76*	25.585	*2,36*	*-37,03*
LAND ROVER	1.120	*0,85*	1.552	*0,90*	*-27,84*	5.633	*0,96*	9.147	*0,84*	*-38,42*
MAZDA	1.021	*0,77*	1.009	*0,59*	*1,19*	4.157	*0,71*	6.343	*0,59*	*-34,46*
MERCEDES	4.988	*3,77*	5.699	*3,31*	*-12,48*	19.180	*3,28*	33.568	*3,10*	*-42,86*
MINI	1.667	*1,26*	2.222	*1,29*	*-24,98*	6.588	*1,13*	11.888	*1,10*	*-44,58*
MITSUBISHI	342	*0,26*	951	*0,55*	*-64,04*	1.952	*0,33*	4.541	*0,42*	*-57,01*
NISSAN	2.132	*1,61*	3.383	*1,96*	*-36,98*	11.526	*1,97*	25.111	*2,32*	*-54,10*
OPEL	4.817	*3,64*	9.020	*5,23*	*-46,60*	24.749	*4,24*	60.109	*5,55*	*-58,83*
PEUGEOT	7.224	*5,45*	8.662	*5,03*	*-16,60*	36.154	*6,19*	62.715	*5,79*	*-42,35*
PORSCHE	693	*0,52*	638	*0,37*	*8,62*	2.730	*0,47*	3.373	*0,31*	*-19,06*
RENAULT	9.617	*7,26*	13.175	*7,65*	*-27,01*	35.321	*6,05*	65.990	*6,09*	*-46,48*
SEAT	2.261	*1,71*	2.265	*1,31*	*-0,18*	9.184	*1,57*	14.711	*1,36*	*-37,57*
SKODA	2.555	*1,93*	2.581	*1,50*	*-1,01*	10.679	*1,83*	14.862	*1,37*	*-28,15*
SMART	317	*0,24*	2.410	*1,40*	*-86,85*	1.479	*0,25*	13.552	*1,25*	*-89,09*
SSANGYONG	118	*0,09*	199	*0,12*	*-40,70*	500	*0,09*	1.384	*0,13*	*-63,87*
SUBARU	221	*0,17*	261	*0,15*	*-15,33*	911	*0,16*	1.303	*0,12*	*-30,08*
SUZUKI	3.301	*2,49*	3.750	*2,18*	*-11,97*	13.463	*2,31*	20.407	*1,88*	*-34,03*
TESLA	382	*0,29*	473	*0,27*	*-19,24*	1.347	*0,23*	1.226	*0,11*	*9,87*
TOYOTA	7.537	*5,69*	7.732	*4,49*	*-2,52*	27.848	*4,77*	50.155	*4,63*	*-44,48*
LEXUS	395	*0,30*	540	*0,31*	*-26,85*	1.754	*0,30*	3.062	*0,28*	*-42,72*
VOLKSWAGEN	11.431	*8,63*	16.214	*9,41*	*-29,50*	54.055	*9,26*	98.916	*9,13*	*-45,35*
VOLVO	1.907	*1,44*	1.693	*0,98*	*12,64*	6.997	*1,20*	10.934	*1,01*	*-36,01*
ALTRE	200	*0,15*	209	*0,12*	*-4,31*	896	*0,15*	1.097	*0,10*	*-18,32*
TOT.MARCHE EST.	**102.937**	*77,71*	**132.986**	*77,18*	*-22,60*	**443.211**	*75,90*	**813.058**	*75,06*	*-45,49*
TOT.MERCATO	**132.457**	*100,00*	**172.312**	*100,00*	*-23,13*	**583.960**	*100,00*	**1.083.184**	*100,00*	*-46,09*

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 30/06/2020

Associazione Nazionale Filiera Industria Automobilistica

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ITALIA - IMMATRICOLAZIONI AUTOVETTURE - Top ten

ITALY - NEW CAR REGISTRATIONS - Top ten

dati provvisori/*provisional data*

TOP 10

N.	MARCA *Make*	MODELLO *Model*	GIUGNO 2020 *JUNE 2020*
1	FIAT	PANDA	9.107
2	RENAULT	CLIO	3.793
3	LANCIA	YPSILON	3.508
4	DACIA	SANDERO	3.221
5	RENAULT	CAPTUR	3.118
6	FIAT	500X	3.079
7	DACIA	DUSTER	2.960
8	FIAT	500[1]	2.739
9	CITROEN	C3	2.501
10	JEEP	COMPASS	2.462

N.	MARCA *Make*	MODELLO *Model*	GEN/GIU 2020 *JAN/JUNE 2020*
1	FIAT	PANDA	46.108
2	LANCIA	YPSILON	18.772
3	RENAULT	CLIO	14.509
4	FIAT	500X	13.180
5	FIAT	500[2]	13.110
6	JEEP	RENEGADE	11.970
7	CITROEN	C3	11.847
8	VOLKSWAGEN	T-ROC	11.097
9	OPEL	CORSA	10.929
10	DACIA	DUSTER	10.926

Fonte: CED - Ministero dei Trasporti

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 30/06/2020

[1] Con la versione Abarth, non compresa nella top10 del Ministero, Fiat 500 occuperebbe la quinta posizione

[2] Comprende la versione Abarth

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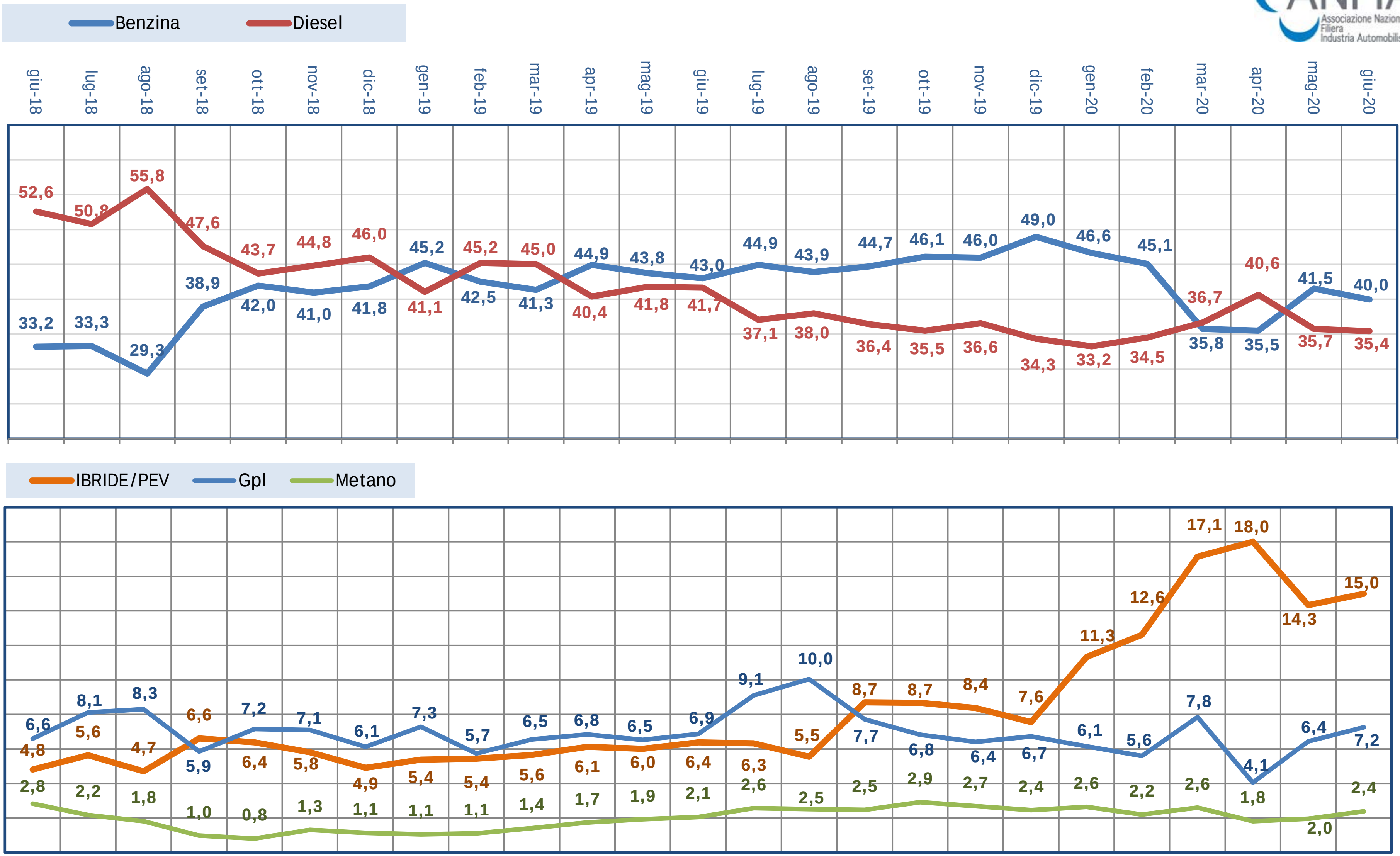
ITALIA - IMMATRICOLAZIONI AUTOVETTURE NUOVE PER ALIMENTAZIONE - TREND MENSILE

Italy - New car registrations by fuel - Monthly trend



Elaborazioni ANFIA su dati del Ministero delle Infrastrutture e dei Trasporti al 30.06.2020
(Aut.Min. D07161/H4)

ITALIA - TRASFERIMENTI DI PROPRIETA' AUTOVETTURE

ITALY - USED CARS: CHANGES IN OWNERSHIP

dati provvisori /provisional data

	GIUGNO *JUNE*				VAR. % *% CHG.*	GENNAIO/GIUGNO *JANUARY/JUNE*				VAR. % *% CHG.*
MARCA/*MAKE*	**2020**		**2019**		*20/19*	**2020**		**2019**		*20/19*
FIAT	57.947	23,40	71.126	22,04	-18,53	300.669	23,20	483.331	22,20	-37,79
FORD	16.481	6,65	22.811	7,07	-27,75	85.988	6,63	152.800	7,02	-43,73
VOLKSWAGEN	14.503	5,86	19.649	6,09	-26,19	76.070	5,87	130.605	6,00	-41,76
OPEL	13.227	5,34	17.226	5,34	-23,21	70.486	5,44	117.358	5,39	-39,94
MERCEDES	12.449	5,03	16.534	5,12	-24,71	65.612	5,06	111.812	5,14	-41,32
LANCIA	11.704	4,73	14.804	4,59	-20,94	61.133	4,72	100.015	4,59	-38,88
RENAULT	11.850	4,78	15.002	4,65	-21,01	60.518	4,67	100.936	4,64	-40,04
CITROEN	10.574	4,27	14.407	4,46	-26,61	56.739	4,38	96.910	4,45	-41,45
PEUGEOT	10.245	4,14	13.505	4,19	-24,14	53.789	4,15	90.687	4,17	-40,69
TOYOTA/LEXUS	9.858	3,98	13.157	4,08	-25,07	53.029	4,09	88.536	4,07	-40,10
BMW	8.656	3,50	12.337	3,82	-29,84	45.268	3,49	84.146	3,86	-46,20
AUDI	8.448	3,41	11.432	3,54	-26,10	44.757	3,45	76.583	3,52	-41,56
NISSAN	7.413	2,99	10.908	3,38	-32,04	39.941	3,08	73.478	3,37	-45,64
ALFA ROMEO	7.152	2,89	9.214	2,86	-22,38	37.538	2,90	63.219	2,90	-40,62
SMART	6.732	2,72	8.195	2,54	-17,85	34.301	2,65	56.732	2,61	-39,54
HYUNDAI	4.440	1,79	5.730	1,78	-22,51	22.784	1,76	37.734	1,73	-39,62
MINI	3.736	1,51	5.201	1,61	-28,17	20.159	1,56	34.147	1,57	-40,96
SUZUKI	3.863	1,56	4.411	1,37	-12,42	19.791	1,53	31.073	1,43	-36,31
LAND ROVER	3.281	1,32	4.424	1,37	-25,84	18.384	1,42	28.835	1,32	-36,24
CHRYSLER	2.498	1,01	3.386	1,05	-26,23	13.791	1,06	23.019	1,06	-40,09
KIA	2.385	0,96	3.352	1,04	-28,85	12.952	1,00	22.441	1,03	-42,28
VOLVO	2.046	0,83	2.675	0,83	-23,51	10.653	0,82	18.794	0,86	-43,32
SEAT	1.834	0,74	2.407	0,75	-23,81	9.263	0,71	16.021	0,74	-42,18
DACIA	1.700	0,69	2.531	0,78	-32,83	9.140	0,71	16.093	0,74	-43,21
MITSUBISHI	1.070	0,43	1.375	0,43	-22,18	5.803	0,45	9.779	0,45	-40,66
MAZDA	1.021	0,41	1.398	0,43	-26,97	5.520	0,43	9.842	0,45	-43,91
PORSCHE	1.041	0,42	1.446	0,45	-28,01	5.385	0,42	9.099	0,42	-40,82
HONDA	1.041	0,42	1.372	0,43	-24,13	5.118	0,39	9.299	0,43	-44,96
JAGUAR	905	0,37	1.234	0,38	-26,66	4.984	0,38	8.113	0,37	-38,57
SKODA	885	0,36	1.152	0,36	-23,18	4.408	0,34	7.761	0,36	-43,20
SUBARU	419	0,17	544	0,17	-22,98	2.248	0,17	3.615	0,17	-37,81
DR	222	0,09	259	0,08	-14,29	1.603	0,12	549	0,03	191,99
SSANGYONG	267	0,11	385	0,12	-30,65	1.489	0,11	2.814	0,13	-47,09
TESLA MOTORS	40	0,02	36	0,01	11,11	158	0,01	151	0,01	4,64
ALTRE	7.722	3,12	9.067	2,81	-14,83	36.789	2,84	60.890	2,80	-39,58
TOTALE	**247.655**	*100,0*	**322.692**	*100,0*	*-23,25*	**1.296.260**	*100,0*	**2.177.217**	*100,0*	*-40,46*

I dati si riferiscono alle certificazioni di avvenuto trasferimento di proprietà rilasciate dagli uffici della Motorizzazione nel mese di riferimento e rappresentano le risultanze dell'Archivio Nazionale dei Veicoli alla data del 30/06/2020