Press Release

ANOTHER DOUBLE-DIGIT SLOWDOWN FOR THE JULY CAR MARKET (-11%), BUT IN GROWTH RESPECT TO THE PREVIOUS MONTH

The hope is that the incentives invested by the Government will be able to address the purchase to low emissions vehicles and will be addressed in support for the renewal of light commercial vehicles, still excluded by the Government support, nowadays

Turin, August 3rd 2020 – According to the data published today by the Minister of Infrastructures and Transport, in July, the Italian car market reached 136,455 registrations, the 11% less respect to the same month in 2019.

The final balance for the first seven months of 2020 counts 720,620 registrations, in slowdown of 41.7% respect to the volumes of the same period of 2019.

"The Italian car market registers a double-digit slowdown also in July (-11%), but with another improvement respect to the previous slowdown of May (-49.6%) and of June (-23.1%) – says **Paolo Scudieri, President of ANFIA**. *Beside the fact that the volumes registered in the summer months are always low, on July registrations still weigh the uncertain climate on times and on the modalities to get out from the health crisis – in addition to this also the concern for the labour market – that for consumers means a trend to savings and the renounce to unnecessary purchases.*

With the recent enter into force of the Relaunch Law, has been done a step to the support of the automotive sector, recognizing a contribution for the purchase of cars with emissions of up to 110 g/Km CO_2, of all powers. However, the investment of only 50 million of Euro, is not enough to relaunch the demand of new cars, since the start of the bonus on August 1st, have already been used almost 10 million. In the 'August Law' which is progress in these days, the Government revealed that it will introduce further measures to support the sectors most affected by the pandemic, including the automotive sector, announcing additional investments of about 500 million euros.

The hope is that these incentives will be able to addressed the purchases to low emissions vehicles, consistently with the European objectives, and also in support for the renewal of light commercial vehicles, still excluded by the Government support, nowadays.

ANFIA and the Industrial car supply chain are also ready to co-operate with the Government in the organization of an industrial plan for the automotive sector to be defined in the next months, also thanks to the availability of the funds of the 'Recovery Fund', which will be used, in a small part, also to help the sector in the transition to new technologies, electrification and digitalization".

Analyzing registrations by **fueling**[1], in July keeps the decrease for the traditional powers, while it is still positive the electrified one.

Diesel cars reduced of 12% during the month, representing the 37% of the market, while in the first 7 months of 2020 registrations have been the 51% less respect to the same period of 2019 with a share of 35%, 7 points less. Petrol cars slowdown of 23% during the month and of 43% in the cumulate, representing the 39% of the July market and the 42% in the first 7 months of 2020. Alternative powers grow instead, reaching during the month a share of 24%, with volumes in growth of 21%, reducing instead of 9.5% in the first seven months. Since the beginning of the year, alternative powered cars registrations, represent the 22.5% of the total, 8 percentage points more respect the same period of 2019.

Keep the slowing down of the gas powered cars. LPG decrease of 37% during the month and of 46% in the cumulate, reaching a share of 6%, both in July and in the first seven months of 2020. In slowdown also methane cars, even if less than the average of the market share: -8.5% in July, with a share on the overall of the market of 2.6%, and -17% in the first seven month of 2020, with a share of 2.4%.

In the end, the hybrids and the electrics segment grow of +117% in July and +36% since the beginning of 2020. Among them, hybrid mild and full cars grow of 107% during the month, with a market share of 13%, and of 24.5% in the first seven months of 2020, with a share of 11% (more than double respect to the same period of 2019). Rechargeable cars sold in July are 177% more respect to July 2019, thanks to the strong variations both of the electric cars (+68% and 1.2% of share) and especially of the hybrids plug-in (+446% and 1.5% of share), and, together represent the 2.7%, both in July and since the beginning of the year. In the cumulate of the first seven months of 2020, rechargeable hybrids and electrics grow of 119% respect to the same period of 2019. In July, the hybrid version of Panda is the best sold car among all the hybrids, rechargeable and not. Good also the hybrid versions of Fiat 500 (fourth place) and of Lancia Ypsilon (seventh place).

Referring to the **market by segments**, in July keep to decrease the super economy registrations, -27% (the best sold models during the month have been Fiat Panda and Fiat 500, which represent the 65% of the segment) and of economy ones, -19% (at the first place Lancia Ypsilon). Medium cars, instead, see their market grow of 5.5%, with the lower-mediums in growth of 5% and the higher-mediums of 7%. In slowdown all sizes SUVs, which decrease of 4% (the 17.5% of registrations of SUVs is represented by FCA Group cars) representing the 44% of the monthly market. Good FCA Group models, which keep in July the first place among the small SUVs (at the first place Fiat 500X and

[1] Temporary Data

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

at the second Jeep Renegade), among the compacted ones (at the first place Jeep Compass) and among the medium ones (first place for Alfa Romeo Stelvio). In detail, slowdown small and compacted SUVs, while grow the medium and the larger ones which respect to July 2019 see an increasement of 40%. A negative variation is registered also for the monovolumes registrations, that in July decrease of 11.5%. In the end, also the superior cars decrease (-6%), as much as, luxury (-8%) and sportive ones (-38%). In the first seven months of 2020, decrease all segments registrations.

According to the ISTAT survey, in July 2020 the **consumer confidence climate index** (base 2010=100), register a slightly slowdown passing from 100.0 to 100.7. The **composite index of the company confidence climate (Iesi)** instead, grows for the second month in row, passing from 66.2 to 76.7.

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 in increase (from -72.2 to -67.8).

According to the ISTAT survey, in July the **national index of consumer prices** registers a slowdown of 0.1% per month and of 0.3% per year (from -0.2% of the previous month). The negative inflation keep to be determinate by the trend of the energetic goods (-9,7%), both in the regulated part (-12%) both in the not regulated one (-9%).

In this last sector looking at the fuel prices, **Diesel** one pass from -14.9% to -12.1% in terms of trend (+2.2% the situation), **Petrol** ones from -13.7% to -11.1% (+2.2% per month), and **other fuels** ones from -6.7% to -5.2% (-0.1% respect to June).

National brands, in the overall, reached during the month 31,629 registrations (-9.8%), with a market share of 23.2%. In the cumulate since the beginning of 2020, the overall registrations reached 172,420 units (-43.5%), with a market share of 23.9%.

The Italian models **in the top ten of the best sold**, are six, with Fiat Panda (9,827 units) always in first place, followed at the second place by Lancia Ypsilon (3,637), which gains a position, while at the third, Fiat 500X (3,571), which gains three places. At the fourth place Jeep Renegade (3,121), followed at the nineth by Fiat 500 (2,644), and at the tenth by Jeep Compass (2,629).

The **second-hand market** reached in July, 273,622 ownerships transfers, including the mini-transfer operations to car dealer, the 27.8% less respect to July 2019. In the first seven months of 2020 are registered 1,569,882 units, with a contraction of 38.6% respect to January-July 2019.

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

For more information: ANFIA Press Office
Miriam Gangi – m.gangi@anfia.it
Ph. +39 011 5546502
Mob. +39 338 7303167

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

Comunicato Stampa

ANFIA Associazione Nazionale Filiera Industria Automobilistica

ITALIA - IMMATRICOLAZIONI AUTOVETTURE

ITALY - NEW CAR REGISTRATIONS

dati provvisori/*provisional data*

	LUGLIO *JULY*				VAR. % *% CHG.*	GENNAIO/LUGLIO *JANUARY/JULY*				VAR. % *% CHG.*
MARCA/*MAKE*	**2020**	*%*	**2019**	*%*	*20/19*	**2020**	*%*	**2019**	*%*	*20/19*
FCA	31.173	*22,84*	34.351	*22,40*	*-9,25*	170.444	*23,65*	302.433	*24,46*	*-43,64*
FIAT	19.536	*14,32*	20.149	*13,14*	*-3,04*	109.554	*15,20*	190.854	*15,43*	*-42,60*
ALFA ROMEO	1.724	*1,26*	2.174	*1,42*	*-20,70*	8.550	*1,19*	16.582	*1,34*	*-48,44*
LANCIA	3.637	*2,67*	4.316	*2,81*	*-15,73*	22.407	*3,11*	39.002	*3,15*	*-42,55*
JEEP	6.147	*4,50*	7.459	*4,86*	*-17,59*	29.252	*4,06*	54.551	*4,41*	*-46,38*
MASERATI	129	*0,09*	253	*0,16*	*-49,01*	681	*0,09*	1.444	*0,12*	*-52,84*
FERRARI	83	*0,06*	66	*0,04*	*25,76*	355	*0,05*	347	*0,03*	*2,31*
DR	321	*0,24*	612	*0,40*	*-47,55*	1.411	*0,20*	2.163	*0,17*	*-34,77*
LAMBORGHINI	48	*0,04*	47	*0,03*	*2,13*	193	*0,03*	237	*0,02*	*-18,57*
ALTRE NAZIONALI	4	*0,00*	3	*0,00*	*33,33*	17	*0,00*	25	*0,00*	*-32,00*
TOT. MARCHE NAZ.	**31.629**	*23,18*	**35.079**	*22,88*	*-9,83*	**172.420**	*23,93*	**305.205**	*24,68*	*-43,51*
AUDI	6.252	*4,58*	6.100	*3,98*	*2,49*	28.099	*3,90*	41.337	*3,34*	*-32,02*
BMW	5.150	*3,77*	3.719	*2,43*	*38,48*	24.916	*3,46*	36.159	*2,92*	*-31,09*
CITROEN/DS	5.421	*3,97*	6.639	*4,33*	*-18,35*	36.248	*5,03*	60.692	*4,91*	*-40,28*
DACIA	5.134	*3,76*	7.655	*4,99*	*-32,93*	27.292	*3,79*	56.194	*4,54*	*-51,43*
FORD	9.259	*6,79*	9.529	*6,21*	*-2,83*	46.906	*6,51*	77.239	*6,25*	*-39,27*
HONDA	639	*0,47*	624	*0,41*	*2,40*	3.335	*0,46*	5.552	*0,45*	*-39,93*
HYUNDAI	4.295	*3,15*	4.276	*2,79*	*0,44*	17.716	*2,46*	29.695	*2,40*	*-40,34*
JAGUAR	358	*0,26*	731	*0,48*	*-51,03*	2.042	*0,28*	5.484	*0,44*	*-62,76*
KIA	3.346	*2,45*	4.015	*2,62*	*-16,66*	19.460	*2,70*	29.600	*2,39*	*-34,26*
LAND ROVER	1.214	*0,89*	1.409	*0,92*	*-13,84*	6.849	*0,95*	10.556	*0,85*	*-35,12*
MAZDA	951	*0,70*	924	*0,60*	*2,92*	5.111	*0,71*	7.267	*0,59*	*-29,67*
MERCEDES	5.383	*3,94*	4.821	*3,14*	*11,66*	24.581	*3,41*	38.390	*3,10*	*-35,97*
MINI	1.921	*1,41*	1.539	*1,00*	*24,82*	8.510	*1,18*	13.427	*1,09*	*-36,62*
MITSUBISHI	369	*0,27*	660	*0,43*	*-44,09*	2.323	*0,32*	5.201	*0,42*	*-55,34*
NISSAN	2.221	*1,63*	3.197	*2,08*	*-30,53*	13.748	*1,91*	28.308	*2,29*	*-51,43*
OPEL	5.863	*4,30*	8.542	*5,57*	*-31,36*	30.621	*4,25*	68.651	*5,55*	*-55,40*
PEUGEOT	7.459	*5,47*	9.120	*5,95*	*-18,21*	43.626	*6,05*	71.835	*5,81*	*-39,27*
PORSCHE	846	*0,62*	677	*0,44*	*24,96*	3.576	*0,50*	4.050	*0,33*	*-11,70*
RENAULT	7.316	*5,36*	9.282	*6,05*	*-21,18*	42.648	*5,92*	75.272	*6,09*	*-43,34*
SEAT	2.510	*1,84*	2.381	*1,55*	*5,42*	11.697	*1,62*	17.092	*1,38*	*-31,56*
SKODA	2.618	*1,92*	2.462	*1,61*	*6,34*	13.300	*1,85*	17.324	*1,40*	*-23,23*
SMART	420	*0,31*	2.081	*1,36*	*-79,82*	1.899	*0,26*	15.633	*1,26*	*-87,85*
SSANGYONG	157	*0,12*	196	*0,13*	*-19,90*	658	*0,09*	1.580	*0,13*	*-58,35*
SUBARU	197	*0,14*	249	*0,16*	*-20,88*	1.108	*0,15*	1.552	*0,13*	*-28,61*
SUZUKI	2.129	*1,56*	3.860	*2,52*	*-44,84*	15.596	*2,16*	24.267	*1,96*	*-35,73*
TESLA	52	*0,04*	169	*0,11*	*-69,23*	1.400	*0,19*	1.395	*0,11*	*0,36*
TOYOTA	6.021	*4,41*	6.711	*4,38*	*-10,28*	33.888	*4,70*	56.866	*4,60*	*-40,41*
LEXUS	511	*0,37*	390	*0,25*	*31,03*	2.265	*0,31*	3.452	*0,28*	*-34,39*
VOLKSWAGEN	14.489	*10,62*	14.465	*9,43*	*0,17*	68.555	*9,51*	113.381	*9,17*	*-39,54*
VOLVO	2.104	*1,54*	1.618	*1,06*	*30,04*	9.103	*1,26*	12.552	*1,02*	*-27,48*
ALTRE	221	*0,16*	215	*0,14*	*2,79*	1.124	*0,16*	1.312	*0,11*	*-14,33*
TOT.MARCHE EST.	**104.826**	*76,82*	**118.256**	*77,12*	*-11,36*	**548.200**	*76,07*	**931.315**	*75,32*	*-41,14*
TOT.MERCATO	**136.455**	*100,00*	**153.335**	*100,00*	*-11,01*	**720.620**	*100,00*	**1.236.520**	*100,00*	*-41,72*

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 31/07/2020

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

ITALIA - IMMATRICOLAZIONI AUTOVETTURE - Top ten

ITALY - NEW CAR REGISTRATIONS - Top ten

dati provvisori/*provisional data*

TOP 10

N.	MARCA *Make*	MODELLO *Model*	LUGLIO 2020 *JULY 2020*
1	FIAT	PANDA	9.827
2	LANCIA	YPSILON	3.637
3	FIAT	500X	3.571
4	JEEP	RENEGADE	3.121
5	VOLKSWAGEN	GOLF	3.042
6	VOLKSWAGEN	T-ROC	2.977
7	VOLKSWAGEN	POLO	2.757
8	DACIA	SANDERO	2.739
9	FIAT	500[1]	2.644
10	JEEP	COMPASS	2.629

N.	MARCA *Make*	MODELLO *Model*	GEN/LUG 2020 *JAN/JUL 2020*
1	FIAT	PANDA	55.938
2	LANCIA	YPSILON	22.409
3	RENAULT	CLIO	17.102
4	FIAT	500X	16.752
5	FIAT	500[2]	16.134
6	JEEP	RENEGADE	15.101
7	VOLKSWAGEN	T-ROC	14.077
8	CITROEN	C3	13.554
9	OPEL	CORSA	13.358
10	VOLKSWAGEN	POLO	13.122

Fonte: CED - Ministero dei Trasporti

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/07/2020

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

[2] Comprende la versione Abarth

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

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