



Press Release

SLOWDOWN OF THE CAR MARKET IN MAY: VOLUMES SPLIT IN HALF (-49.6%) AND ALMOST 460,000 REGISTRATIONS LOST SINCE THE BEGINNING OF THE YEAR

Turin, June 1st 2020 - According to the data published today by the Minister of Infrastructures and Transport, in May, the Italian car market reached 99,711 registrations, which means the 49,6% less respect to the same month of 2019.

The summary of the first five months of 2020 counts, 451,366 registrations, with volumes split in half respect to the same period of the previous year (-50.5%), with a loss of almost 460,000 units.

"May data confirmed how difficult recovery is for the automotive sector, after two months of almost zeroing of the market - says Paolo Scudieri, President of ANFIA. Last May 4th, at the reopening, dealership networking had to deal with families and businesses economic difficulties, in a climate of great uncertainty and low propensity to purchase durable goods, not to mention last month ended, in the first part, with restrictions on citizen mobility.

What it worst is that Institutions at all levels seem do not want to reserve a place for the sector in our Country. Beyond the lack of a relaunch plan for the supply chain, as happened in some other European major markets, like France, which has already put in play - to bring back both the demand and the production on the normal levels as quickly as possible, but also for the transition to the electrification in the medium to long term - signs of hostility and discrimination are perceived.

It has not gone unnoticed, in fact, the attitude of the Municipality of Milan, in the Council resolution approved in the last days, that sets out the guidelines for the urban regeneration in the spaces of the city following a public/private partnership model. Presenting the rules for the sponsorships concession for public and private persons which could submit a project proposal, it is specified the prohibition of direct advertising or advertising linked to car brands that are not consistent with the environmental sustainability policies promoted by the Municipality, as well as the production or distribution of tobacco, super-alcohol, pornographic, sexually-motivated and weapons-related material.

An unacceptable juxtaposition where automotive is located at the same level of few ethically problematic sectors, underlining an undeniable prejudice against it, even more considering what it has been done by all car makers, in the last ten days, like those massive investments in innovation to reach the Europe's sustainable mobility objectives, dealing with the challenge of electrification with commitment and efforts".

Italian Association of Automotive Industry (ANFIA)

Analyzing registrations by fueling¹, the large negative trend in the May market hit especially diesel car registrations, which decrease of 57% and represent the 36% of the whole market, while in the first five months of 2020 the slowdown of registrations is about the 60% less respect to the ones of the same period of 2019 and their share is about 34.5%, 8 points less. During the closing of dealerships, from March 12th to April 30th, the share of diesel cars grew of 41%, due to the prevalence of registrations to commercial companies (rental, fleets). Petrol cars decrease of 52% in May and of 50% in the cumulate, and represent the 41.5% of the market of May and the 44% in the cumulate. A bit better, but always in strong slowdown, alternative powered cars registrations which, in the overall, reach during the month, a share of 23% and reduce of 21% in the month and of 23% in the first five months. Since the beginning of the year, registrations of the alternative powered cars represent the 21% of the overall.

LPG cars decrease of 50% in the month and of 54% in the cumulate, reaching a share of 6%, both of May and both in the first five months of 2020.

Are in slowdown also methane cars, in decrease of 48,5% in May, with a share on the overall of the market of 2%, and of 21% in the first five months of 2020, with a penetration share of 2.3%.

In countertrend respect to the rest of the market, electric and hybrid segment grows of +20% in May and of +11.5% since the beginning of 2020. Among them, mild and full hybrids of 11%, with a market share of 11% and in the first five months of 2020, lose the 0.4%, with a share of 10%, doubled respect to the same period of 2019. In the first three months of 2020, the Italian car market witnessed the overtaking of traditional hybrids cars in terms of share on the sales of the overall alternative powered ones, the 48% the first ones, against the 40.5% the second one, bringing Italy at the third place in Europe, in this segment, the U.K. and Germany.

Rechargeable cars sold in May 2020 are the 78% more respect to May 2019, thanks to the strong positive variations both of the electric cars (+51.5%, with the 1.8% of share), and of the hybrids plug-in (+144.5% and 1.2% of share), that together represent the 3% of the market. In the cumulate in the first five months of 2020, electric ones and the rechargeable hybrids grow of 109% respect to the same period of 2019.

Referring to the market by segments, in May is registered an overall decrease, with all the segments strongly in slowdown. During the month, decrease of 62% super economy registrations (the best sold models are Fiat Panda and Fiat 500) and of 47% the economy ones, the best sold model is Lancia Ypsilon. Medium ones (the best sold model is Fiat Tipo) see their market decrease of 55%, with the medium-lower in slowdown of 56% and the higher medium ones of 49%. Only all sizes SUVs are in decrease, losing the 40% of the market (the 16% of registrations is represented by FCA Group cars)

¹ Temporary Data

representing the 45% of the market month, with small SUVs which show a negative variation of 41%, compacted ones of 43%, mediums ones of 31% and the big ones of 12% (the lowest decrease among all segments). The negative variation is also for monovolumes registrations, which decrease in May of 60%. In the end, a strong slowdown is registered for the higher segment (-63%), luxury (-49%) and sportive ones (-54%).

Also registrations of all segments in the first five months of 2020 are in slowdown.

According to the ISTAT survey, calculating the data collected in May 2020 it indicate level historically low both **consumer confidence climate index** (basis 2010=100) stops with 94.3, both in the composite **index of the company confidence climate** (lesi) with 51.1.

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 strong decrease (-96.4, after the -85.9 of March and the -49.1 in February, while in April data was not available because of the COVID-19 emergency).

According to the ISTAT survey, in May the **national index of consumer prices** register a slowdown of 0.1% both per month and per year (the trend of variation was none last month). The trend of slowdown of the general index of consumer prices is mainly given by the dynamics of the prices of the energetics goods not regulated, which underlines their decrease (da -7.6% to -12.2%).

In this last sector, looking at the trend of fuels prices, **Diesel** ones pass from -10.7% to -16.2% in terms of trend (-5.1% the situation), **Petrol** from -9% to -15.2% (-4.7% per month), while **other fuels** from -5.3% to -6.7% (-1.9% respect to April).

National brands, overall, totalized during the month 22.546 registrations (-57%), with a market share of 22.6%. In the cumulate since the beginning of 2020, the overall of registrations reached 111,217 units (-51.8%), with a market share of 24.6%.

In May, the Italian models in the **top ten of the best sold**, are five, with Fiat Panda (6,462 units) always in first place, followed at the third by Lancia Ypsilon (2,437) and at the fourth place by Jeep Compass (2,322). At the fifth place is located Fiat 500X (2,318), followed at the tenth by Jeep Renegade (2,080).

The **second-hand market** in May totalized 206.967 ownerships transfers, including the mini-transfer operations to car dealers, the 44.6% less respect to May 2019. In the first five months of 2020 are registered 1,048,605 units, a contraction of 43.5% respect to January-May 2019.

Italian Association of Automotive Industry (ANFIA)



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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 Supply 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 billions of Euro of income, which means 11% of the total of the production in Italy and of 6.2% of the Italian GDP

76.3 billions of Euro of tax levy of motorization

Italian Association of Automotive Industry (ANFIA)

ITALIA - IMMATRICOLAZIONI AUTOVETTURE
ITALY - NEW CAR REGISTRATIONS

dati provvisori/provisional data

MARCA/MAKE	MAGGIO MAY				VAR. % % CHG. 20/19	GENNAIO/MAGGIO JANUARY/MAY				VAR. % % CHG. 20/19
	2020	%	2019	%		2020	%	2019	%	
FCA	22.281	22,35	52.073	26,32	-57,21	110.110	24,39	229.173	25,16	-51,95
FIAT	13.975	14,02	34.971	17,67	-60,04	71.422	15,82	147.410	16,18	-51,55
ALFA ROMEO	1.172	1,18	2.351	1,19	-50,15	5.293	1,17	11.849	1,30	-55,33
LANCIA	2.438	2,45	6.090	3,08	-59,97	15.262	3,38	30.336	3,33	-49,69
JEEP	4.608	4,62	8.465	4,28	-45,56	17.725	3,93	38.653	4,24	-54,14
MASERATI	88	0,09	196	0,10	-55,10	408	0,09	925	0,10	-55,89
FERRARI	62	0,06	42	0,02	47,62	198	0,04	233	0,03	-15,02
DR	185	0,19	218	0,11	-15,14	793	0,18	1.232	0,14	-35,63
LAMBORGHINI	16	0,02	48	0,02	-66,67	106	0,02	147	0,02	-27,89
ALTRE NAZIONALI	2	0,00	3	0,00	-33,33	10	0,00	15	0,00	-33,33
TOT. MARCHE NAZ.	22.546	22,61	52.384	26,47	-56,96	111.217	24,64	230.800	25,34	-51,81
AUDI	3.841	3,85	6.742	3,41	-43,03	15.988	3,54	28.587	3,14	-44,07
BMW	3.810	3,82	5.556	2,81	-31,43	15.127	3,35	27.234	2,99	-44,46
CITROEN/DS	5.101	5,12	9.040	4,57	-43,57	24.729	5,48	46.185	5,07	-46,46
DACIA	4.532	4,55	8.981	4,54	-49,54	15.753	3,49	40.007	4,39	-60,62
FORD	6.868	6,89	11.948	6,04	-42,52	28.765	6,37	57.876	6,35	-50,30
HONDA	389	0,39	852	0,43	-54,34	2.051	0,45	4.153	0,46	-50,61
HYUNDAI	2.358	2,36	4.688	2,37	-49,70	10.429	2,31	20.812	2,28	-49,89
JAGUAR	216	0,22	594	0,30	-63,64	1.426	0,32	4.073	0,45	-64,99
KIA	2.445	2,45	4.044	2,04	-39,54	13.114	2,91	21.389	2,35	-38,69
LAND ROVER	985	0,99	1.174	0,59	-16,10	4.513	1,00	7.595	0,83	-40,58
MAZDA	713	0,72	998	0,50	-28,56	3.136	0,69	5.334	0,59	-41,21
MERCEDES	3.562	3,57	6.046	3,06	-41,09	14.180	3,14	27.869	3,06	-49,12
MINI	1.167	1,17	2.089	1,06	-44,14	4.920	1,09	9.666	1,06	-49,10
MITSUBISHI	237	0,24	926	0,47	-74,41	1.609	0,36	3.590	0,39	-55,18
NISSAN	1.644	1,65	3.993	2,02	-58,83	9.392	2,08	21.728	2,39	-56,77
OPEL	3.988	4,00	10.705	5,41	-62,75	19.925	4,41	51.089	5,61	-61,00
PEUGEOT	6.257	6,28	10.268	5,19	-39,06	28.925	6,41	54.053	5,93	-46,49
PORSCHE	549	0,55	926	0,47	-40,71	2.037	0,45	2.735	0,30	-25,52
RENAULT	6.219	6,24	13.014	6,58	-52,21	25.691	5,69	52.815	5,80	-51,36
SEAT	1.600	1,60	2.869	1,45	-44,23	6.921	1,53	12.446	1,37	-44,39
SKODA	1.910	1,92	2.907	1,47	-34,30	8.123	1,80	12.281	1,35	-33,86
SMART	362	0,36	2.411	1,22	-84,99	1.162	0,26	11.142	1,22	-89,57
SSANGYONG	45	0,05	215	0,11	-79,07	382	0,08	1.185	0,13	-67,76
SUBARU	173	0,17	228	0,12	-24,12	690	0,15	1.042	0,11	-33,78
SUZUKI	2.867	2,88	3.491	1,76	-17,87	10.162	2,25	16.657	1,83	-38,99
TESLA	80	0,08	161	0,08	-50,31	965	0,21	753	0,08	28,15
TOYOTA	4.309	4,32	9.007	4,55	-52,16	20.285	4,49	42.423	4,66	-52,18
LEXUS	337	0,34	773	0,39	-56,40	1.359	0,30	2.522	0,28	-46,11
VOLKSWAGEN	8.910	8,94	18.933	9,57	-52,94	42.610	9,44	82.702	9,08	-48,48
VOLVO	1.538	1,54	1.766	0,89	-12,91	5.089	1,13	9.241	1,01	-44,93
ALTRE	153	0,15	152	0,08	0,66	691	0,15	888	0,10	-22,18
TOT.MARCHE EST.	77.165	77,39	145.497	73,53	-46,96	340.149	75,36	680.072	74,66	-49,98
TOT.MERCATO	99.711	100,00	197.881	100,00	-49,61	451.366	100,00	910.872	100,00	-50,45

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 31/05/2020

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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>	MAGGIO 2020 <i>MAY 2020</i>
1	FIAT	PANDA	6.462
2	VOLKSWAGEN	T-ROC	2.499
3	LANCIA	YPSILON	2.437
4	JEEP	COMPASS	2.322
5	FIAT	500X	2.318
6	DACIA	DUSTER	2.234
7	RENAULT	CAPTUR	2.213
8	CITROEN	C3	2.119
9	RENAULT	CLIO	2.102
10	JEEP	RENEGADE	2.080

Fonte: CED - Ministero dei Trasporti

N.	MARCA <i>Make</i>	MODELLO <i>Model</i>	GEN/MAG 2020 <i>JAN/MAY 2020</i>
1	FIAT	PANDA	36.988
2	LANCIA	YPSILON	15.264
3	RENAULT	CLIO	10.709
4	FIAT	500X	10.101
5	FIAT	500 ²	9.979
6	JEEP	RENEGADE	9.610
7	CITROEN	C3	9.346
8	OPEL	CORSA	8.868
9	VOLKSWAGEN	T-ROC	8.848
10	VOLKSWAGEN	POLO	8.553

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/05/2020

² Comprende la versione Abarth

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