Press Release

IN SEPTEMBER THE CAR MARKET BACK ON TRACK (+9.5%)

Decisive contribution of the demand in support of the measure entered into force, for which ANFIA hopes to see, once it would be converted in law the DL of August, the extension of the scrapping time from 15 to 45 days.
Crucial, in the same situation, also the introduction of measures to relaunch for the light commercial vehicle market

Turin, October 1st 2020 – According to the data published today by the Minister of Infrastructures and Transport, in September the Italian car market reached 156,132 registrations, which means the 9.5% more respect to the same month of 2019.

The final balance in the first nine months of 2020 counts 966,017 registrations in slowdown of 34,2% respect to the volumes of the same period of 2019.

"After a stable August, followed by a decrease last for in 7 months in row, in September 2020 the Italian car market finally gains a positive sign (+9.5%), also benefiting from a working day more respect to September 2019 (22 days against 21) – says **Paolo Scudieri, President of ANFIA**.

The incentives introduced with the "Relaunch" and the "August" Decrees contributed in a decisive way to this result, finding a good response in consumers, with positive effects for the entire automotive production supply chain, including components. The funds provided for the 91-110 g/km CO_2 *slot, in fact, have been quickly exhausted and soon will be also the ones available for the 61-90 slot (150 million euros, of which less than 70 million remains).*

The hope is that once the August Decree will become law, also the light commercial vehicles could benefit of the measures in support of the demand, to encourage the investments for companies involved in urban goods logistics and thus renew the circulating fleet, with a view to reducing environmental impact. In the same situation, regarding cars, the hope is he extension of scrapping times, from 15 to 45 days in order to solve the problems of congestion of practices that are already occurring.

In the end, regarding the reform of the Highway Code, we are in favor of a revision that aims to ensure greater road safety, but, as already reported by ACI, it is appropriate to avoid excessively penalizing rules for four-wheeled mobility and that risk finding a different application in the various Italian municipalities, creating confusion among road users".

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Analyzing registrations by **fueling**[1], a September keeps going on the slowdown of the traditional fuels, while the trend is still positive for the electrified cars.

Diesel cars, during September reduced of 3% representing the 32% of the market, while in the first 9 months of 2020 registrations are the 45% less respect to the ones of the same period of 2019 with a share of 35% (6 points less of the same period of 2019). Petrol cars slowdown of 19% during the month and of 39% in the cumulate representing the 33% of the September market and the 40% in the first 9 months of 2020. Alternative powered cars sales double during the month, +102%, reaching a share of 35%, and grow of 9% in the first nine months. Since the beginning of the year, car registrations of the alternative powered cars represent the 25% of the overall, 10 percentage points more respect to the ones of the same period in 2019.

LPG cars grow of the 8% during the month and slowdown of 40% in the cumulate, with a share of 8% during September and of 7% in the first 9 months of 2020. Methane cars slowdown both in September (-0.3%, with a share in the market overall of 2.2%), and in the first nine months of 2020 (-12% with a share of 2.4%).

Grows, instead, the hybrid and the electric segment, +215% in September and +72% since the beginning of 2020. Among these, mild and full hybrids grow of 210% during the month, with a market share of 20.5%, and of 60% in the first nine months of 2020, with a share of 13% (it was of 5% in the same period of 2019). The rechargeable cars sold during September 2020 are the 241% more respect to September 2019, thanks to the strong positive variations both for the electric cars (+224% and 2.6% of share) and, especially the hybrids plug-in (+268% and 1.9% of share), which together, represent the 4.5% of the market in the last month and of 3% since the beginning of the year. In the cumulate of the first nine months of 2020, electrics and rechargeable hybrids grow of 154% respect to the same period of 2019.

In September, the Panda hybrid version is the best sold model among the hybrids models. Positive also the hybrids versions of Lancia Ypsilon and of Fiat 500, respectively at the fourth place and at the sixth. Jeep Compass and Jeep Renegade are the first two best sold hybrids plug-in models.

Referring to the **market by segments**, in September grow the super economy cars registrations, +11.4% (the best sold models during the month are always, Fiat Panda and Fiat 500, which represent the 59% of the segment) and the economy ones, +28.2% (at the first place always Lancia Ypsilon). Medium cars market grows of 6.2%, the lower-medium of 2,7% and higher-medium of 15%. SUVs register a trend of growth of 6.6% (the 17.5% of registrations belong to FCA group) representing the 41% of the market in the month. Grow of 10.7% small SUVs registrations (at the first place Jeep Renegade and at the fourth Fiat 500X), the ones of compacted SUVs of 8,2% and the big SUVs ones of 3.4%

[1] Temporary Data

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while, decreases of 11.6% of medium SUVs (still at the first place Alfa Romeo Stelvio). The negative variation for monovolumes registrations, which in September slowdown of 25.5%. In the end, decrease the higher cars of 5% and the sportive ones of 52%, while grow of 12% the luxury cars.

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

According to the ISTAT survey, in September 2020 improve both the **consumer confidence climate index** (base 2010=100), which goes from 101.0 to 103.4, and the **composite index of the company confidence climate** (Iesi), which grows from 81.4 to 91.1.

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 growing (from -61.7 to -53.2).

According to the ISTAT survey, in September the **national index of consumer prices** registers a slowing down of 0.6% per month and of 0.5% per year (as the previous month). The negative inflation keep to be determinate by the trend of the regulated energetic goods (from -13.7% to-13.6%), by the not regulated ones (from -8.6% to -8.2%) and of the prices of the transport services (from -2.3% to -1.6%) for the fifth months in row.

In the not regulated energy goods looking at the fuel prices **Diesel** ones pass from -11.7% to -11.8% in terms of trend (-0.8% the situation), **Petrol** one from -10.8% to -10.3% (-0.4% the economic variation), and the ones of the **Other Fuels** from -3.6% to -2.3% (-0.1% respect to August).

National brands, in the overall, reached during the month 37,654 registrations (+18.2%), with a market share of 24.1% (it was 22.35 in September 2019). In the cumulate since the beginning of 2020, the overall of registrations reach 230,769 units (-35.7%), with a market share of 23.9%.

FCA brands (Maserati included) totalized in the overall 37,146 registrations in the month (+17.5%), with a market share of 23.8% (22.2% in September 2019). Positive trend also for Fiat (+19.1%), Lancia (+12.8%), Jeep (+24.3%) and Maserati (+7.1%) brands.

In the first nine months of 2020, FCA brands totalized 227,970 registered cars, with a decrease of 35.8% and a market share of 23.6%.

The Italian models in the top ten of the best sold are four, with Fiat Panda (13,793 units) always at the first place – also in the progressive since the beginning of

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the year- followed at the second by Lancia Ypsilon (4,686), which gains a position and at the fourth by Jeep Renegade (4,061). In the end at the tenth Fiat 500X (2,981).

The **second-hand market** reached in September, 362,523 ownerships transfers, including the mini-transfer operations to car dealer, the 7% more respect to September 2019. In the first nine months of 2020 are registered 2,088,132 units, with a contraction of 33.3% respect to January-September 2019.

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ANFIA - Italian Association of the Automotive Industry
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*

	SETTEMBRE *SEPTEMBER*				VAR. % *% CHG.*	GENNAIO/SETTEMBRE *JANUARY/SEPTEMBER*				VAR. % *% CHG.*
MARCA/*MAKE*	**2020**	*%*	**2019**	*%*	*20/19*	**2020**	*%*	**2019**	*%*	*20/19*
FCA	37.146	*23,79*	31.622	*22,19*	*17,47*	227.970	*23,60*	354.944	*24,17*	*-35,77*
FIAT	23.134	*14,82*	19.431	*13,63*	*19,06*	144.941	*15,00*	223.321	*15,21*	*-35,10*
ALFA ROMEO	2.073	*1,33*	2.178	*1,53*	*-4,82*	11.950	*1,24*	19.922	*1,36*	*-40,02*
LANCIA	4.687	*3,00*	4.157	*2,92*	*12,75*	29.360	*3,04*	45.663	*3,11*	*-35,70*
JEEP	7.085	*4,54*	5.700	*4,00*	*24,30*	40.832	*4,23*	64.388	*4,39*	*-36,58*
MASERATI	167	*0,11*	156	*0,11*	*7,05*	887	*0,09*	1.650	*0,11*	*-46,24*
FERRARI	27	*0,02*	37	*0,03*	*-27,03*	404	*0,04*	423	*0,03*	*-4,49*
DR	479	*0,31*	164	*0,12*	*192,07*	2.171	*0,22*	3.268	*0,22*	*-33,57*
LAMBORGHINI	-	*0,00*	26	*0,02*	-	200	*0,02*	274	*0,02*	*-27,01*
ALTRE NAZIONALI	2	*0,00*	3	*0,00*	*-33,33*	24	*0,00*	36	*0,00*	*-33,33*
TOT. MARCHE NAZ.	**37.654**	*24,12*	**31.852**	*22,35*	*18,22*	**230.769**	*23,89*	**358.945**	*24,45*	*-35,71*
AUDI	4.005	*2,57*	4.521	*3,17*	*-11,41*	35.003	*3,62*	48.530	*3,31*	*-27,87*
BMW	4.819	*3,09*	4.732	*3,32*	*1,84*	32.289	*3,34*	43.672	*2,97*	*-26,06*
CITROEN/DS	6.803	*4,36*	6.657	*4,67*	*2,19*	47.708	*4,94*	71.029	*4,84*	*-32,83*
DACIA	7.022	*4,50*	4.337	*3,04*	*61,91*	38.083	*3,94*	66.384	*4,52*	*-42,63*
FORD	10.657	*6,83*	9.524	*6,68*	*11,90*	64.169	*6,64*	92.392	*6,29*	*-30,55*
HONDA	1.000	*0,64*	756	*0,53*	*32,28*	4.750	*0,49*	6.610	*0,45*	*-28,14*
HYUNDAI	4.062	*2,60*	4.561	*3,20*	*-10,94*	24.951	*2,58*	36.534	*2,49*	*-31,70*
JAGUAR	364	*0,23*	601	*0,42*	*-39,43*	2.562	*0,27*	6.376	*0,43*	*-59,82*
KIA	4.428	*2,84*	3.831	*2,69*	*15,58*	26.453	*2,74*	35.741	*2,43*	*-25,99*
LAND ROVER	1.021	*0,65*	1.462	*1,03*	*-30,16*	8.397	*0,87*	12.641	*0,86*	*-33,57*
MAZDA	1.451	*0,93*	1.273	*0,89*	*13,98*	7.286	*0,75*	8.964	*0,61*	*-18,72*
MERCEDES	5.568	*3,57*	5.238	*3,67*	*6,30*	32.765	*3,39*	46.045	*3,14*	*-28,84*
MINI	2.008	*1,29*	2.088	*1,46*	*-3,83*	11.454	*1,19*	16.275	*1,11*	*-29,62*
MITSUBISHI	593	*0,38*	457	*0,32*	*29,76*	3.203	*0,33*	6.006	*0,41*	*-46,67*
NISSAN	3.597	*2,30*	3.678	*2,58*	*-2,20*	19.425	*2,01*	33.657	*2,29*	*-42,29*
OPEL	4.963	*3,18*	8.572	*6,01*	*-42,10*	39.324	*4,07*	81.771	*5,57*	*-51,91*
PEUGEOT	8.205	*5,26*	7.938	*5,57*	*3,36*	57.132	*5,91*	84.640	*5,76*	*-32,50*
PORSCHE	283	*0,18*	640	*0,45*	*-55,78*	4.135	*0,43*	4.929	*0,34*	*-16,11*
RENAULT	11.012	*7,05*	6.281	*4,41*	*75,32*	58.783	*6,09*	87.413	*5,95*	*-32,75*
SEAT	1.975	*1,26*	2.072	*1,45*	*-4,68*	15.246	*1,58*	20.488	*1,40*	*-25,59*
SKODA	2.937	*1,88*	1.983	*1,39*	*48,11*	17.891	*1,85*	20.695	*1,41*	*-13,55*
SMART	554	*0,35*	1.634	*1,15*	*-66,10*	2.637	*0,27*	19.953	*1,36*	*-86,78*
SSANGYONG	111	*0,07*	149	*0,10*	*-25,50*	889	*0,09*	1.878	*0,13*	*-52,66*
SUBARU	196	*0,13*	192	*0,13*	*2,08*	1.391	*0,14*	1.868	*0,13*	*-25,54*
SUZUKI	4.966	*3,18*	2.512	*1,76*	*97,69*	22.430	*2,32*	28.240	*1,92*	*-20,57*
TESLA	956	*0,61*	375	*0,26*	*154,93*	2.554	*0,26*	1.883	*0,13*	*35,63*
TOYOTA	8.962	*5,74*	7.814	*5,48*	*14,69*	47.057	*4,87*	68.396	*4,66*	*-31,20*
LEXUS	389	*0,25*	599	*0,42*	*-35,06*	2.891	*0,30*	4.304	*0,29*	*-32,83*
VOLKSWAGEN	13.578	*8,70*	14.122	*9,91*	*-3,85*	90.888	*9,41*	134.951	*9,19*	*-32,65*
VOLVO	1.766	*1,13*	1.977	*1,39*	*-10,67*	11.996	*1,24*	15.423	*1,05*	*-22,22*
ALTRE	227	*0,15*	104	*0,07*	*118,27*	1.506	*0,16*	1.604	*0,11*	*-6,11*
TOT.MARCHE EST.	**118.478**	*75,88*	**110.680**	*77,65*	*7,05*	**735.248**	*76,11*	**1.109.292**	*75,55*	*-33,72*
TOT.MERCATO	**156.132**	*100,00*	**142.532**	*100,00*	*9,54*	**966.017**	*100,00*	**1.468.237**	*100,00*	*-34,21*

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 30/09/2020

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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*	SETTEMBRE 2020[1] *SEPTEMBER 2020*[1]
1	FIAT	PANDA	13.793
2	LANCIA	YPSILON	4.686
3	RENAULT	CLIO	4.105
4	JEEP	RENEGADE	4.061
5	DACIA	SANDERO	3.712
6	FORD	PUMA	3.645
7	TOYOTA	YARIS	3.639
8	DACIA	DUSTER	3.052
9	RENAULT	CAPTUR	3.042
10	FIAT	500X	2.981

N.	MARCA *Make*	MODELLO *Model*	GEN/SET 2020 *JAN/SEP 2020*
1	FIAT	PANDA	75.059
2	LANCIA	YPSILON	29.361
3	RENAULT	CLIO	23.004
4	FIAT	500X	22.177
5	JEEP	RENEGADE	21.296
6	FIAT	500[2]	20.977
7	DACIA	SANDERO	18.540
8	CITROEN	C3	17.949
9	DACIA	DUSTER	17.780
10	VOLKSWAGEN	POLO	17.732

Fonte: CED - Ministero dei Trasporti

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

[2] Comprende la versione Abarth

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