BLACK NOVEMBER, CAR MARKET IS SINKED (- 8.3%)

It is necessary back on the virtuos path for the environment and for the economy where the incentives brought to a demolition of 155 thousand tons of CO_2

Another November in the red for the Italian car market. The summer incentives effect is over, after a negative October, new vehicles registrations strongly decrease reaching the 138,405 units, in slowdown of 8.3% respect to the 151,001 of the same period in 2019. All of this considering the working day in addition respect of this November, which is even more worrying. From January to November the gap reached 515,000 cars lost in 11 months respect to 2019, marking a strong decrease of 29% (1,261.802 registrations in the overall respect to 1,776.501 from January to November 2019).

"The demand supporting measures of last months – says Paolo Scudieri, President of ANFIA – *in addition to be crucial for the re-start of the market and for the renewal of the fleet environmentally speaking, effected, positively, also on the components and on the cars production in our country, helping the supply chain for which the national market has an important role next to the international markets. However, with an European and a national market still under pressure because of the pandemic, in the last months we saw to an increasing resort to the unemployment benefit from the automotive companies, a situation which risk to get worse if will not be activated, soon, actions in support of the demand which we expect will be repaid from the tax revenues generated, in the mid-long term, measures which in support of the green and the digital transition of the supply chain. In the end, the necessity to help the re-start of the light commercial vehicles, which has an important industrial role in Italy and also because of strong increase in the online sells, is raising to an even more strategic role in the logistic of the urban freights".*

"Without a new action in support of the car market, the new sells slowdown – underlines Adolfo De Stefani Cosentino, Presidente di FEDERAUTO – *put our companies in the condition to resort to the unemployment benefit that, will not be enough to contain the loss of income which until now reached, respect to 2019, the average -25%. The unemployment benefit data regarding January – October 2020, respect to the same period of 2019, show an increase of 6.000%, for an amount of authorized hours over 60 million. This is an impressive data that push us in thinking about the value of a lack action in support of the car market".*

"We remember – adds Michele Crisci, President of UNRAE – *that the summer incentives represented fresh air for Manufacturers and for the whole industry, but brought first of all a benefit for the environment: thanks to incentives, according to Invitalia data, have been scrapped more than 120.000 cars until Euro 4 category, highly polluting and unsafe, saving our cities from over than 155.000 tons of CO_2 per year. Environment and economy showed that could live together if the maneuvers are appropriated". "The goal* – closes Crisci – *is to have the same measures for 2021 with a renewal of the incentives for modernization of the fleet in opposition to the current recession conditions and a bigger VAT deductibility for business cars, measure already entered into force in the main European countries and this absence penalized our market because it reduces the competitiveness"*

December 1st, 2020

ANFIA - Italian Association of the Automotive Industry
FEDERAUTO – Italian Federation of Car Delears
UNRAE – National Association of Foreign Car makers Representatives

Press Release

Analysis of the Italian Car Market in November 2020

Turin December 1st, 2020 – According to the data published today by the Minister of Infrastructures and Transport, in November the Italian car market reaches 138,405 registrations, the 8.3% less respect to the same month in 2019.

The final balance of the first eleven months of 2020 counts, 1,261.802 registrations, in slow down of 29% respect to the volumes of the same period of 2019.

Analyzing **registrations by fueling**[1], in November keeps going on the slowdown of the traditional fuels supply, while is always positive the electrified cars market.

Diesel cars, during November, decrease of 29% representing the 28% of the market, while in the first eleven months of 2020 registrations are the 41% less respect to the same period of 2019, with a share of 33%, almost seven points less respect to January-November 2019. Petrol cars slowdown of 37% during the month and of 38% in the cumulate representing the 31% of November's market and of the 38% of the first eleven months of 2020. Alternative powered cars registrations double also in November, +111%, reaching the 40% of share (it was the 17.5% in November 2019), registering a growth of 29% in the first eleven months. Since the beginning of the year, alternative powered cars registrations represent the 28% of the overall, 13 percentage more of the same period of 2019.

LPG cars grow of 14% during the month and decrease of 32% in the cumulate, reaching a share of the 8% in November and of 7% in the first eleven months of 2020. Another decrease in November for methane cars, -31%, with a share on the market's overall of 2%; in the first eleven months of 2020, the market slowdown is of 19%, with a share of 2.3%.

It keeps to grew, instead, the hybrid and electric cars segment, +231% in November and +108% since the beginning of 2020. Among them, mild and full hybrid cars grow of 204% during the month, with a market share of 23%, and of 94.5% in the first eleven months 2020, with a share of 16% (it was 6% in the same period of 2019). Rechargeable cars sold in November 2020 are the 369% more respect to November 2019, thanks to the strong positive variations both of electric cars (+341.5% e 3.5% of share) especially in the plug-in hybrids (+399% and 3.5% of share) that together represent the 7% of the market during the month and of the 4% since the beginning of the month. In the cumulate of the first eleven months of 2020, electrics and rechargeable hybrids grow of 195.5% respect to the same period of 2019.

[1] Temporary Data

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The hybrid version of Panda is, also in November, the best sold model among all the hybrid. At the third and at the fourth place the hybrids versions of Lancia Ypsilon and of Fiat 500. Jeep Compass is the best hybrid plug-in sold model in November, while the plug-in version of Jeep Renegade is located at the fourth place.

Referring to the **market by segments**, in November slowdown all segments sells with the exception of the economy cars, +16% (at the second place Lancia Ypsilon). Super economies shows a trend of decrease of 17% (Fiat Panda and Fiat 500 are still the best sold models and represent the 62% of the segment). Low-medium volumes slowdown of 21%, mediums ones of 18% and higher-mediums volumes of 12%. SUVs show a trend of decrease of 8% (the 19.5% of the SUVs registrations belong to FCA Group cars) representing, in November, the 42% of the market. Grow of 3.6% the registrations of the small SUVs (at the second place Jeep Renegade and at the fourth Fiat 500X), while it slowdown of the 13% compacted SUVs ones (Jeep Compass is always the best sold model during the month), of 25% mediums SUVs ones (at the first place there is always Alfa Romeo Stelvio) and of 18% large SUVs ones. Negative variation for the monovolumes registrations which decrease in November of 29%. In the end, decrease of 18% sportive cars registrations, while grow of 11% luxury cars ones.

In the first eleven months of 2020, are in double-digit slowdown all the segments registrations.

According to ISTAT, in November 2020 is expected a slowdown both of the **consumer confidence index** (base 2010=100), which passes from 101.7 to 98.1, and of the **composite index of the company confidence climate (Iesi)**, which goes from 92.2 to 82.8.

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 in strong decrease (from -53.2 to -72.3).

According to preliminary ISTAT estimates, in November, **the national consumer price index** registers a slowdown of 0.1% per month and of 0.2% per year (from -0.3% respect to the previous month). The negative inflation, for the seventh month in row, is determinated by the slowdown of energy prices (-8.6%, from -8.7% of the previous month).

National brands, in the overall, totalized 35,226 registrations (+2.3%), with a market share of 25.5% (it was of 22.8 in November 2019). In the cumulate since the beginning of 2020, the overall of the registrations reach 304,820 units (-28.7%), with a market share of 24.2%.

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FCA brands (Maserati included) totalized in the overall 34,746 registrations during the month (+1.6%), with a market share of 25.1% (22.7% in November 2019). Positive trend for Jeep (+18%) and Maserati (+48.8%). Positive trend also for Ferrari (+81.8%).

In the first eleven months of 2020, FCA brands totalized 300,909 registered cars, with a decrease of 28.9%.

The Italian models in the **top ten of the best sold** are five, with Fiat Panda (10.817 units) always at the first place – also in the progressive since the beginning of the year- followed, at the third place, by Lancia Ypsilon (4,215) and at the fourth by Fiat 500 (3,745), which gains one position. The sixth place is occupied by Jeep Compass (3,655), followed, at the seventh by Jeep Renegade (3,369), which gains one position.

The **second-hand market** reached in November, 295,546 ownerships transfers, including the mini-transfer operations to car dealer, the 12.1% less respect to November 2019. In the first eleven months of 2020 are registered 2,741.636 units, with a contraction of 29.1% respect to January-November 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

Comunicato Stampa

ANFIA Associazione Nazionale Filiera Industria Automobilistica

ITALIA - IMMATRICOLAZIONI AUTOVETTURE

ITALY - NEW CAR REGISTRATIONS

dati provvisori/*provisional data*

	NOVEMBRE *NOVEMBER*				VAR. % *% CHG.*	GENNAIO/NOVEMBRE *JANUARY/NOVEMBER*				VAR. % *% CHG.*
MARCA/*MAKE*	**2020**	*%*	**2019**	*%*	*20/19*	**2020**	*%*	**2019**	*%*	*20/19*
FCA	34.746	*25,10*	34.206	*22,65*	*1,58*	300.909	*23,85*	423.007	*23,81*	*-28,86*
FIAT	21.342	*15,42*	21.776	*14,42*	*-1,99*	191.726	*15,19*	266.616	*15,01*	*-28,09*
ALFA ROMEO	1.986	*1,43*	2.039	*1,35*	*-2,60*	15.537	*1,23*	23.860	*1,34*	*-34,88*
LANCIA	4.216	*3,05*	4.321	*2,86*	*-2,43*	38.295	*3,03*	54.831	*3,09*	*-30,16*
JEEP	7.022	*5,07*	5.949	*3,94*	*18,04*	54.132	*4,29*	75.773	*4,27*	*-28,56*
MASERATI	180	*0,13*	121	*0,08*	*48,76*	1.219	*0,10*	1.927	*0,11*	*-36,74*
FERRARI	40	*0,03*	22	*0,01*	*81,82*	488	*0,04*	482	*0,03*	*1,24*
DR	423	*0,31*	184	*0,12*	*129,89*	3.131	*0,25*	3.637	*0,20*	*-13,91*
LAMBORGHINI	17	*0,01*	19	*0,01*	*-10,53*	261	*0,02*	305	*0,02*	*-14,43*
ALTRE NAZIONALI	-	*0,00*	2	*0,00*	*-*	31	*0,00*	38	*0,00*	*-18,42*
TOT. MARCHE NAZ.	**35.226**	*25,45*	**34.433**	*22,80*	*2,30*	**304.820**	*24,16*	**427.469**	*24,06*	*-28,69*
AUDI	5.435	*3,93*	5.440	*3,60*	*-0,09*	46.061	*3,65*	59.540	*3,35*	*-22,64*
BMW	4.884	*3,53*	4.764	*3,15*	*2,52*	42.475	*3,37*	53.605	*3,02*	*-20,76*
CITROEN/DS	7.195	*5,20*	6.791	*4,50*	*5,95*	63.347	*5,02*	85.210	*4,80*	*-25,66*
DACIA	6.188	*4,47*	5.891	*3,90*	*5,04*	49.841	*3,95*	77.417	*4,36*	*-35,62*
FORD	8.311	*6,00*	10.019	*6,64*	*-17,05*	82.787	*6,56*	113.209	*6,37*	*-26,87*
HONDA	587	*0,42*	731	*0,48*	*-19,70*	6.340	*0,50*	8.079	*0,45*	*-21,52*
HYUNDAI	2.666	*1,93*	4.720	*3,13*	*-43,52*	31.688	*2,51*	46.261	*2,60*	*-31,50*
JAGUAR	382	*0,28*	480	*0,32*	*-20,42*	3.303	*0,26*	7.639	*0,43*	*-56,76*
KIA	2.804	*2,03*	3.977	*2,63*	*-29,49*	33.527	*2,66*	44.305	*2,49*	*-24,33*
LAND ROVER	869	*0,63*	1.270	*0,84*	*-31,57*	10.645	*0,84*	15.497	*0,87*	*-31,31*
MAZDA	888	*0,64*	1.444	*0,96*	*-38,50*	9.485	*0,75*	11.811	*0,66*	*-19,69*
MERCEDES	4.238	*3,06*	5.428	*3,59*	*-21,92*	42.750	*3,39*	56.624	*3,19*	*-24,50*
MINI	2.055	*1,48*	2.070	*1,37*	*-0,72*	15.392	*1,22*	20.330	*1,14*	*-24,29*
MITSUBISHI	217	*0,16*	632	*0,42*	*-65,66*	3.822	*0,30*	7.324	*0,41*	*-47,82*
NISSAN	2.970	*2,15*	2.895	*1,92*	*2,59*	25.867	*2,05*	40.368	*2,27*	*-35,92*
OPEL	4.807	*3,47*	5.560	*3,68*	*-13,54*	50.277	*3,98*	93.261	*5,25*	*-46,09*
PEUGEOT	7.896	*5,70*	8.034	*5,32*	*-1,72*	73.691	*5,84*	102.454	*5,77*	*-28,07*
PORSCHE	497	*0,36*	578	*0,38*	*-14,01*	5.264	*0,42*	6.277	*0,35*	*-16,14*
RENAULT	9.291	*6,71*	8.485	*5,62*	*9,50*	77.220	*6,12*	104.276	*5,87*	*-25,95*
SEAT	2.140	*1,55*	2.192	*1,45*	*-2,37*	19.725	*1,56*	24.846	*1,40*	*-20,61*
SKODA	2.283	*1,65*	2.104	*1,39*	*8,51*	22.911	*1,82*	24.845	*1,40*	*-7,78*
SMART	728	*0,53*	5.610	*3,72*	*-87,02*	4.047	*0,32*	27.727	*1,56*	*-85,40*
SSANGYONG	72	*0,05*	137	*0,09*	*-47,45*	1.070	*0,08*	2.187	*0,12*	*-51,07*
SUBARU	204	*0,15*	305	*0,20*	*-33,11*	1.876	*0,15*	2.398	*0,13*	*-21,77*
SUZUKI	3.684	*2,66*	2.404	*1,59*	*53,24*	31.071	*2,46*	34.194	*1,92*	*-9,13*
TESLA	263	*0,19*	136	*0,09*	*93,38*	2.881	*0,23*	2.086	*0,12*	*38,11*
TOYOTA	7.706	*5,57*	7.723	*5,11*	*-0,22*	63.091	*5,00*	84.668	*4,77*	*-25,48*
LEXUS	358	*0,26*	425	*0,28*	*-15,76*	3.690	*0,29*	5.131	*0,29*	*-28,08*
VOLKSWAGEN	11.882	*8,58*	14.060	*9,31*	*-15,49*	115.535	*9,16*	165.938	*9,34*	*-30,37*
VOLVO	1.515	*1,09*	2.146	*1,42*	*-29,40*	15.410	*1,22*	19.683	*1,11*	*-21,71*
ALTRE	164	*0,12*	117	*0,08*	*40,17*	1.893	*0,15*	1.842	*0,10*	*2,77*
TOT.MARCHE EST.	**103.179**	*74,55*	**116.568**	*77,20*	*-11,49*	**956.982**	*75,84*	**1.349.032**	*75,94*	*-29,06*
TOT.MERCATO	**138.405**	*100,00*	**151.001**	*100,00*	*-8,34*	**1.261.802**	*100,00*	**1.776.501**	*100,00*	*-28,97*

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 30/11/2020

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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*	NOVEMBRE 2020 *NOVEMBER 2020*
1	FIAT	PANDA	10.817
2	TOYOTA	YARIS	4.462
3	LANCIA	YPSILON	4.215
4	FIAT	500[1]	3.745
5	DACIA	SANDERO	3.683
6	JEEP	COMPASS	3.655
7	JEEP	RENEGADE	3.253
8	CITROEN	C3	3.110
9	RENAULT	CAPTUR	3.099
10	VOLKSWAGEN	T-CROSS	3.090

N.	MARCA *Make*	MODELLO *Model*	GEN/NOV 2020 *JAN/NOV 2020*
1	FIAT	PANDA	100.855
2	LANCIA	YPSILON	38.296
3	FIAT	500[2]	29.351
4	RENAULT	CLIO	29.234
5	FIAT	500X	28.658
6	JEEP	RENEGADE	27.933
7	CITROEN	C3	25.709
8	DACIA	SANDERO	24.884
9	RENAULT	CAPTUR	24.662
10	TOYOTA	YARIS	24.583

Fonte: CED - Ministero dei Trasporti

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 30/11/2020

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

[2] Comprende la versione Abarth

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