



## Press release

### **IN SEPTEMBER, THE NEGATIVE TREND OF THE ITALIAN AUTOMOTIVE MANUFACTURING INDEX WORSENERD (-12.1%), COMPARED WITH A SEPTEMBER 2020 THAT WAS STILL NEGATIVE (-6.2%) BUT RECOVERING IN THE MOTOR VEHICLE MANUFACTURING SECTOR, WHICH HAD BEEN IN DECLINE FOR 3 MONTHS, AS EVIDENCED BY LOW CAR PRODUCTION LEVELS**

In the ninth month of this year, production volumes in the automotive sector as a whole were 17.6% below their pre-pandemic levels in September 2019, while in the year-to-date 2021, they were down 9.7% compared to the same period in 2019.

Passenger car manufacturing, according to preliminary ANFIA data, again down sharply: -53.3% in the month compared to September 2020 and -36.4% compared to September 2019

*Turin, 10<sup>th</sup> November 2021* - In September 2021, according to ISTAT data, the **manufacturing output of the Italian automotive industry overall**<sup>1</sup> recorded a drop of 12.1%, compared to September 2020 (and fell by as much as 17.6% when compared to September 2019), while in the first nine months of 2021 it increased by 34.7% (-9.7% compared to January-September 2019).

Looking at the sector's **manufacturing segments**, the manufacturing of motor vehicles index<sup>2</sup> (Ateco code 29.1) fell by 38.9% in September 2021 and increased by 26.9% in the first nine months of 2021 compared to the same period in 2020; the manufacturing of bodies for motor vehicles, trailers, and semi-trailers index (Ateco code 29. 2) increased by 30.1% for the month and 32.5% cumulatively, and that of the manufacture of parts and accessories for motor vehicles and their engines<sup>3</sup> grew by 17.9% in September and 44.9% in the period January-September 2021.

According to preliminary data from ANFIA, **domestic car production**, on the other hand, is down sharply: -53.5% in the month, while it closes the first nine months of 2021 up 16.3% compared to the same period in 2020. Compared to 2019, the number of cars produced was down 36.4% in September and 23.8% in the first nine months of 2021.

Automotive manufacturing has been part of the overall Italian industrial production growth since March 2021, after 24 months of negative signs. In September 2021, the

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<sup>1</sup> Ateco code 29: manufacture of motor vehicles, manufacture of bodywork for motor vehicles, trailers and semi-trailers and manufacture of parts and accessories for motor vehicles and their engines (excluding tyres).

<sup>2</sup> Motor vehicles" means passenger cars and light and heavy commercial vehicles.

<sup>3</sup> Ateco code 29.3, does not include tyres.

Italian Association of Automotive Industry (ANFIA)

**index for industrial manufacturing as a whole<sup>4</sup>** closed at +4.4% compared to September 2020 (but -0.5% compared to September 2019). It was up 14.6% in the first nine months of this year compared to the same period in 2020 (but down 1.9% compared to January-September 2019).

**Turnover in industrial manufacturing** in the strict sense (excluding Construction) is up 17.4% in August, the latest available figure (+16.4% in the domestic market and +19.3% in foreign markets) and closes at +26% for the first eight months of 2021 (+27.6% domestic market and +22.9% foreign market).

*“After the reversal of the trend recorded in August (-1.8%), which followed five consecutive months of growth, in September Italian automotive manufacturing showed a double-digit, and therefore much more marked, drop (-12.1%)”, commented Gianmarco Giorda, Director of ANFIA.*

*For the third consecutive month, the motor vehicle manufacturing index recorded a downward trend of 38.1% in September (-37.4% last August and -7.4% in July), a fact the trend in car production well illustrates that during the month, which was again down sharply, as in August. The most critical factors in this contraction were the semiconductor shortage and the exhaustion of resources from the Ecobonus fund for the purchase of cars with emissions from 0 to 60 g/km of CO<sub>2</sub>, which was then refinanced, with resources only becoming available again from the 27th of October, and once again cancelled in less than two days. The adverse effects of too many 'stop-and-go' incentives, which we hope will not be repeated in 2022, thanks to the introduction, in the Budget Law, of a three-year structural measure to support both the passenger car market and the low-emission light commercial vehicle market, as part of a plan to accompany the sector's energy and production transition.*

*For the manufacturing of parts and accessories for motor vehicles, the production index increased by 17.9% in the month, thanks to the comparison with September 2020 that was still in sharp decline (-23.8%) and exports in the first seven months of the current year also closed with an increase compared to the same period in 2020 (+32.3%)”.*

In January-July 2021 (latest available data), exports of motor vehicles (new cars and commercial vehicles) from Italy were worth € 10.1 billion, while imports were worth € 15.7 billion. In terms of value, Germany is the top destination country for Italian car exports, with a 16% share, followed by France (15.5%) and the United States (14.4%).

In the same period, exports of automotive components were worth € 13.28 billion, with a positive balance of € 3.5 billion.

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<sup>4</sup> Corrected for calendar effects: there were 22 working days in both September 2021 and September 2020 (excluding Construction). As of 2018, industrial production indices are published by ISTAT using the new reference base 2015=100 (until last month the base was 2010=100).



**Turnover in the automotive<sup>5</sup> sector as a whole increased by 2.7% in August (latest available data), with the domestic sales up 0.4% (foreign exports up 5.2%). In the January-August 2021 period, turnover increased by 45.1% (+57.1% for domestic turnover and +30.9% for foreign turnover).**

**Finally, turnover from parts and accessories for motor vehicles and their engines fell by 0.8% in August (-2% in the domestic market and -0.1% abroad). In the first eight months of 2021, the turnover index for this segment increased by 37.0%, with a growth in domestic turnover of 46.7% (foreign turnover increased by 29.3%).**

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#### **ANFIA - Italian Association of the Automotive Industry**

Founded in March 1912, over its hundred years, ANFIA's 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, regarding 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 chaired by a President. Components: motor vehicle parts and components manufacturers; Car Coachbuilders and Designers: companies are working in the sector of design, engineering, and style of motor vehicles and parts and components for the automotive industry; Motor vehicles: motor vehicles manufacturers in general, including trucks, trailers, camper vans, unique means of transport.

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#### **The Automotive Production Chain in Italy**

5,546 companies

278,000 employees (direct and indirect), more than 7% of the employees in the Italian manufacturing sector

106.1 billion Euros of turnover, which means 11% of the Italian manufacturing sector turnover and 6.2% of the Italian GDP

76.3 billion Euros of tax levy of motorisation

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<sup>5</sup> Raw data. Data updated to September will be published by Istat on 19 November 2021.