Press Release

CAR MARKET DOWN SIGNIFICANTLY IN AUGUST: -27.3%

In addition to the usual summer slowdown, the persistent problems linked to the production and supply of semiconductors have had a significant impact, resulting in delays in delivering new vehicles sold.
There is an urgent need to extend the timeframe within which sellers are required to confirm the sale of incentivised vehicles and refinance the Ecobonus after the funds were exhausted since the 26th of August, making the Extrabonus unavailable

Turin, 1st September 2021 – According to data published today by the Ministry of Infrastructure and Sustainable Mobility, in August 2021, the Italian car market registered 64,689 new vehicles (-27.3%) compared to 88,973 units in August 2020.

The volumes registered in the first eight months of 2021 thus amounted to 1,060,182 units, 30.9% more than the volumes for January-August 2020.

"In August, in addition to the seasonal factor typical of the summer months, with their traditionally low volumes, the heavy drop in new car registrations was affected by the persistent problems linked to the production and supply of semiconductors. This situation is slowing down or even blocking the production of various car makers in Europe and beyond and causing consequent delays in delivering new vehicles sold" - stated **Paolo Scudieri, President of ANFIA.**

Therefore, it is essential to quickly accept ANFIA's long-standing request to extend the timeframe within which sellers are required to confirm the sale of incentivised vehicles. As well as the proposal to refinance as soon as possible the Ecobonus fund for the purchase of cars with emissions from 0 to 60 g/km of CO_2, whose expiry on the 26th of August makes it impossible to benefit from incentives for the purchase of pure electric cars and plug-in hybrids since the allocations of the DL Sostegni bis for the Extrabonus complementary fund are no longer usable.

The depletion of stock, together with the natural reduction during the summer months, has slowed the pace of growth in sales of rechargeable cars, which from February to July 2021 showed three-or four-figure monthly increases. Also, compared with the particularly critical months of 2020, they show an increase 'only' in double figures in August.

Since it is extremely urgent to resolve these problems, we hope that solutions will be found as early as tomorrow in the Transport Bill to be discussed by the Council of Ministers.

It is also necessary to resume the dialogue with the government to define, in the coming months, a strategic plan for the industrial transition of the automotive sector, capable of accompanying the supply chain towards the challenging European objectives of reducing CO_2 emissions from new cars and the technological shift to electrification".

Looking at registrations by **fuel type** in detail[1], the decline of diesel and petrol cars continues, with their share of the market steadily shrinking, favouring hybrids and electric vehicles. In August, the percentage of non-rechargeable hybrids exceeded that of petrol cars for the second month in a row. It was the highest in the market, having already been higher than the share of diesel since February.

Diesel cars, down 55.9% in August, accounted for 21.3% of the market and 23.5% in the first eight months of 2021 (it was 35.1% in the same period in 2020). Since the start of the year, diesel cars have seen the most significant drop in their market, with registrations down 12.3%. The petrol car market is also down, with 49.7% and 25.1% share in August and -1.6% in the first eight months, with 31.3% share (10 percentage points less than in January-August 2020).

On the other hand, registration of alternatively fuelled cars accounted for more than half of the market in August 2021 and 45.1% in the first eight months, up 36.2% for the month and 155% since the start of the year. Electrified cars account for more than 40% of the market (41.6% for the month and 36% for the year to date). Of these, non-rechargeable hybrids were up 53% in August. They exceeded 30% share for the first time, accounting for 31.7% of the market for the month (a higher percentage than diesel for the seventh consecutive month and that of petrol cars for the second time) while growing 218% cumulatively, with a share of 27.9%. Rechargeable cars, up 81.5% in August, had a 9.9% share and 8.1% share in the first eight months (plug-in hybrids 4.9% in the month and 4.5% in the aggregate, and electric cars 5% in the month and 3.6% in the total). Finally, gas-powered vehicles accounted for 12% in August and 9.1% of the market in the first eight months, with LPG cars accounting for 9.7% in the month and 6.8% in the year-to-date period and CNG cars for 2.3% in both the month and the first eight months. Sales of LPG vehicles grew both in the month (+4.2%) and since the beginning of the year (+39%), while sales of CNG vehicles fell by 40.2% in August and increased by 22.9% in the year to date.

Fiat Panda, Fiat 500 Hybrid and Lancia Ypsilon continued their strong performance, taking first, second and third place respectively in the mild/full hybrid segment for the month. Among PHEVs, Jeep Compass and Jeep Renegade took the top two positions in the sales rankings, both in August and in the first eight months, while Fiat 500 is by far the best-selling electric model, both in August and since the start of 2021.

[1] Provisional Data

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Looking at the **market by segment**, small and super-utility cars accounted for 37% of the market in August, down 25.7%, while in the first eight months of this year, their share was 39.3% (+38.6%). The best-selling model is still the Fiat Panda, with the Fiat 500 and Lancia Ypsilon in second and third place. On the other hand, in the medium segments, cars have a market share of 10.9% in August (-37%) and 11.4% in the first eight months of 2021 (+10.2%), with Fiat Tipo in first place in August and since the start of the year.

In August, SUVs had a 46.9% market share, down 27.9%, and accounted for 46.1% of the cumulative market, up 33.9%. In detail, small SUVs accounted for 23.7% of the market for the month and were down 27.5% compared to August 2020, while growing 36.6% year to date. Compact SUVs accounted for 17.7% (led by Jeep Compass and Peugeot 3008 in third place), down 29.4% for the month and up 34.2% over the first eight months of 2021. With a 4.4% share, Medium SUVs fell 20.8% and increased 24.7% cumulatively, while sales of large SUVs accounted for 1% of the total (down 37.3% and up 20.6% in the first eight months of 2021). Stellantis Group cars accounted for 27.9% of SUV sales.

MPVs made up 2% of the August market and 1.7% in the first eight months and were down both in the month (41.5%) and cumulatively (-12.4%).

According to the ISTAT survey, in August[2], the **consumer confidence index** (base 2010=100) is estimated to decrease from 116.6 to 116.2 and the comparative **business confidence index** (Iesi) from 115.9 to 114.2.

Concerning consumer confidence, moreover, for durable goods, including cars, the index relating to the current opportunity to purchase was down compared to July 2021 (from -3.7 to -16.3).

According to preliminary ISTAT estimates, in August, the **national consumer price index** rose by 0.5% monthly and 2.1% annually (from +1.9% in the previous month). The upward trend in inflation is mainly due to prices of energy goods (from +18.6% in July to +19.8%) and, in particular, of non-regulated components (from +11.2% to +12.8%), while the prices of the regulated parts continued to show tremendous growth (accelerating slightly from +34.2% to +34.4%).

In the sector of unregulated energy goods, looking at the trend in fuel prices, the prices of **Diesel** accelerated (from +16.2% to +17%; +0.5% monthly), those of **Petro**l (from +16.5% to +17.6%; +0.7% compared to the previous month), and the prices of **Other fuels** (from +12.3% to +15.3%; +2.3% compared to July).

[2] Starting from January 2021, Istat changes the estimation methodology of the consumer survey variables. Historical series of percentage response frequencies, balances and climates have been calculated with the new estimator by means of calibration and are available from January 1998.

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Overall, the **Stellantis Group** registered 21,698 vehicles in the month (-36.2%), with a market share of 33.5%.

In cumulative terms since the beginning of 2021, the Group's total registrations stood at 413,697 units (+31.3%), with a market share of 39% (it was 38.9% in the first eight months of 2020).

There are six Stellantis Group models in the **August top ten**, with the Fiat Panda still at the top of the list (3,009 units), followed in second place by the Fiat 500 (2,444), which climbs two places from the July list, and in third place by the Lancia Ypsilon (2,056). In fifth place was the Jeep Renegade (1,723), up three places, followed in seventh by the Jeep Compass (1,619) and in ninth by the Fiat 500X (1,386).

Lastly, the **used car market** totalled 203,844 transfers of ownership before mini transfers to dealers in August 2021, 30.9% more than in August 2020. In the first eight months of 2021, there were 2,288,829 transfers of ownership, up 32.6% compared to the same period in 2020.

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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 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 parts and components for the automotive industry; 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
5,546 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 motorization

Comunicato Stampa

ANFIA Associazione Nazionale Filiera Industria Automobilistica

ITALIA - IMMATRICOLAZIONI AUTOVETTURE
ITALY - NEW CAR REGISTRATIONS

dati provvisori/*provisional data*

MARCA/*MAKE*	AGOSTO *AUGUST*				VAR. % *% CHG.*	GENNAIO/AGOSTO *JANUARY/AUGUST*				VAR. % *% CHG.*
	2021	%	2020	%	*21/20*	2021	%	2020	%	*21/20*
STELLANTIS Group*	***21.698***	***33,5***	***33.999***	***38,2***	***-36,2***	***413.697***	***39,0***	***315.049***	***38,9***	***+31,3***
FIAT	9.327	14,4	12.242	13,8	-23,8	164.483	15,5	121.826	15,0	+35,0
PEUGEOT	2.887	4,5	5.289	5,9	-45,4	65.615	6,2	48.931	6,0	+34,1
CITROEN	1.730	2,7	4.366	4,9	-60,4	50.330	4,7	38.012	4,7	+32,4
JEEP	3.407	5,3	4.485	5,0	-24,0	46.885	4,4	33.751	4,2	+38,9
OPEL	1.499	2,3	3.727	4,2	-59,8	42.207	4,0	34.362	4,2	+22,8
LANCIA	2.057	3,2	2.263	2,5	-9,1	32.304	3,0	24.673	3,0	+30,9
ALFA ROMEO	472	0,7	1.328	1,5	-64,5	7.668	0,7	9.879	1,2	-22,4
DS	257	0,4	261	0,3	-1,5	3.088	0,3	2.895	0,4	+6,7
MASERATI	62	0,1	38	0,0	+63,2	1.117	0,1	720	0,1	+55,1
VW Group	***10.515***	***16,3***	***15.121***	***17,0***	***-30,5***	***176.612***	***16,7***	***140.593***	***17,4***	***+25,6***
VOLKSWAGEN	5.718	8,8	8.723	9,8	-34,4	92.705	8,7	77.316	9,5	+19,9
AUDI	2.425	3,7	2.896	3,3	-16,3	43.344	4,1	30.999	3,8	+39,8
SKODA	1.186	1,8	1.648	1,9	-28,0	20.263	1,9	14.955	1,8	+35,5
SEAT	1.035	1,6	1.573	1,8	-34,2	16.202	1,5	13.271	1,6	+22,1
PORSCHE	145	0,2	274	0,3	-47,1	3.876	0,4	3.852	0,5	+0,6
LAMBORGHINI	6	0,0	7	0,0	-14,3	222	0,0	200	0,0	+11,0
RENAULT Group	***6.843***	***10,6***	***8.866***	***10,0***	***-22,8***	***90.084***	***8,5***	***78.836***	***9,7***	***+14,3***
RENAULT	4.284	6,6	5.104	5,7	-16,1	51.802	4,9	47.775	5,9	+8,4
DACIA	2.559	4,0	3.762	4,2	-32,0	38.282	3,6	31.061	3,8	+23,2
TOYOTA Group	***4.137***	***6,4***	***4.404***	***4,9***	***-6,1***	***64.173***	***6,1***	***40.599***	***5,0***	***+58,1***
TOYOTA	3.993	6,2	4.167	4,7	-4,2	60.998	5,8	38.097	4,7	+60,1
LEXUS	144	0,2	237	0,3	-39,2	3.175	0,3	2.502	0,3	+26,9
FORD	***4.518***	***7,0***	***6.585***	***7,4***	***-31,4***	***62.066***	***5,9***	***53.522***	***6,6***	***+16,0***
HYUNDAI Group	***5.195***	***8,0***	***5.723***	***6,4***	***-9,2***	***59.390***	***5,6***	***42.916***	***5,3***	***+38,4***
HYUNDAI	2.305	3,6	3.166	3,6	-27,2	30.243	2,9	20.889	2,6	+44,8
KIA	2.890	4,5	2.557	2,9	+13,0	29.147	2,7	22.027	2,7	+32,3
BMW Group	***2.962***	***4,6***	***3.481***	***3,9***	***-14,9***	***50.053***	***4,7***	***36.921***	***4,6***	***+35,6***
BMW	2.262	3,5	2.545	2,9	-11,1	37.316	3,5	27.475	3,4	+35,8
MINI	700	1,1	936	1,1	-25,2	12.737	1,2	9.446	1,2	+34,8
DAIMLER Group	***1.814***	***2,8***	***2.772***	***3,1***	***-34,6***	***39.101***	***3,7***	***29.288***	***3,6***	***+33,5***
MERCEDES	1.643	2,5	2.588	2,9	-36,5	34.549	3,3	27.205	3,4	+27,0
SMART	171	0,3	184	0,2	-7,1	4.552	0,4	2.083	0,3	+118,5
SUZUKI	***1.754***	***2,7***	***1.868***	***2,1***	***-6,1***	***28.269***	***2,7***	***17.468***	***2,2***	***+61,8***
NISSAN	***1.541***	***2,4***	***2.081***	***2,3***	***-25,9***	***18.747***	***1,8***	***15.829***	***2,0***	***+18,4***
VOLVO	***638***	***1,0***	***1.118***	***1,3***	***-42,9***	***14.119***	***1,3***	***10.231***	***1,3***	***+38,0***
JAGUAR LAND ROVER Grou	***540***	***0,8***	***680***	***0,8***	***-20,6***	***11.795***	***1,1***	***9.574***	***1,2***	***+23,2***
LAND ROVER	395	0,6	525	0,6	-24,8	8.642	0,8	7.376	0,9	+17,2
JAGUAR	145	0,2	155	0,2	-6,5	3.153	0,3	2.198	0,3	+43,4
MAZDA	***606***	***0,9***	***722***	***0,8***	***-16,1***	***8.462***	***0,8***	***5.836***	***0,7***	***+45,0***
DR	***383***	***0,6***	***279***	***0,3***	***+37,3***	***4.713***	***0,4***	***1.693***	***0,2***	***+178,4***
HONDA	***302***	***0,5***	***412***	***0,5***	***-26,7***	***4.180***	***0,4***	***3.750***	***0,5***	***+11,5***
TESLA	***308***	***0,5***	***196***	***0,2***	***+57,1***	***3.453***	***0,3***	***1.598***	***0,2***	***+116,1***
MITSUBISHI	***212***	***0,3***	***287***	***0,3***	***-26,1***	***2.866***	***0,3***	***2.611***	***0,3***	***+9,8***
SUBARU	***107***	***0,2***	***87***	***0,1***	***+23,0***	***1.531***	***0,1***	***1.195***	***0,1***	***+28,1***
FERRARI	***27***	***0,0***	***22***	***0,0***	***+22,7***	***435***	***0,0***	***377***	***0,0***	***+15,4***
ALTRE	***589***	***0,9***	***270***	***0,3***	***+118,1***	***6.436***	***0,6***	***2.092***	***0,3***	***+207,6***
TOTALE MERCATO	**64.689**	**100,0**	**88.973**	**100,0**	**-27,3**	**1.060.182**	**100,0**	**809.978**	**100,0**	**+30,9**

Fonte: CED - Ministero delle Infrastrutture e della Mobilità sostenibili

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/08/2021

* Fino al 2020 Alfa Romeo, Fiat, Jeep e Lancia erano conteggiati nel Gruppo FCA, Citroen, DS, Opel e Peugeot nel Gruppo PSA

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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*	AGOSTO 2021[1] *AUGUST 2021*
1	FIAT	PANDA	3.009
2	FIAT	500	2.444
3	LANCIA	YPSILON	2.056
4	FORD	PUMA	1.857
5	JEEP	RENEGADE	1.723
6	TOYOTA	YARIS	1.690
7	JEEP	COMPASS	1.619
8	RENAULT	CAPTUR	1.429
9	FIAT	500X	1.386
10	DACIA	SANDERO	1.300

N.	MARCA *Make*	MODELLO *Model*	GEN/AGO 2021 *JAN/AUG 2021*
1	FIAT	PANDA	77.312
2	FIAT	500[2]	35.401
3	LANCIA	YPSILON	32.304
4	TOYOTA	YARIS	27.832
5	FIAT	500X	27.049
6	JEEP	RENEGADE	26.135
7	FORD	PUMA	24.258
8	CITROEN	C3	21.867
9	VOLKSWAGEN	T-ROC	21.132
10	OPEL	CORSA	20.274

Fonte: CED - Ministero delle Infrastrutture e della Mobilità sostenibili

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/08/2021

[1] Con versione Elettrica e marchio Abarth, la Fiat 500 occuperebbe la prima posizione

[2] Comprende versione Elettrica e marchio Abarth

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