Press Release

MARKET STILL IN SLOWDOWN DURING THE SECOND MONTH OF THE YEAR, WHICH CLOSES WITH -12.3%, THE WORST FEBRUARY IN THE LAST 6 YEARS

Electrified cars are always in crosscurrent: hybrids and electrics, together, grow of 141.8% and, in terms of penetration share, with the 34.8% of the registered during the month, overtake petrol cars (33%), while mild and full hybrids, in the overall, represent the 28.9% of the market against the 24.6% of the diesel ones

Turin, 1st March 2021 – According to data published today by the Ministry of sustainable infrastructures and mobility, in February the Italian car market totalled 142,998 new vehicle registrations, with a decrease of 12.3% respect to the same month of 2020.

The volumes registered in the first two month of 2021 reached, 277,145 units, the 13.1% less respect to the volumes in January and February 2020.

"*During the second month of the year, we see again a negative performance of the car market, given by the lowest volumes noticed since February 2015* - says **Paolo Scudieri, President of ANFIA**. *Despite an improved consumer and confidence index - partly thanks to the renewed political stability, with the start-up of the new government's activities - the current opportunity for consumers to purchase durable goods, including cars, worsened during the month, evidently due to an economic situation that is still critical and requires adequate time and action for a real recovery.*

The *incentive measures demand, into force until the end of June, are still essential to support the sector at this delicate time.*

Electrified car registrations continue to go against the trend respect to the overall sales, with hybrids and electric cars, together, in growth of 141.8% in the month with a share of 34.8%, overtaking petrol cars (33% of share). At the same time, mild and full hybrids, representing the 28.9% of the market during February, overtake the penetration share of the diesel cars (24.6%). Excellent performance also for rechargeable vehicles, whose monthly volumes overtake those of February 2020 by 124.5%, reaching a share of 5.9% (2.3% in February 2020 and 5% in January 2021).

Just starting from these numbers in the segments which are the main characters in the green revolution, we hope for the quickest possible implementation of the necessary actions to successfully achieve the technological transition that the automotive industry is going through, acting on all the enabling factors for a concrete development of electrified mobility, especially on the side of the diffusion and ubiquity of recharging infrastructure of all kinds and on the facilitation of funding - for research,

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but also for productive investments - and retraining of the skills of the actors in the industrial sector".

A detailed analysis of **registrations by fuel**[1] confirms the slowdown in traditional fuels in the second month of 2021, while the electrified market continues to be positive. **Diesel** cars decrease of 37.5% in the month and represent the 24.6% of the February market (10 percentage points less than in February 2020), while in the first two months of 2021 they show a 25.6% of share, in slowdown of 34.4%. **Petrol** cars decrease of 35.7% for the month representing the 33% of the market, while in the cumulative first two months the decrease is about the 34.5% with a share of 34.6%. For **alternative fuels**, registrations grow of 82% in the month (42% of share; it was 20% in February 2020) and the 70.9% in the cumulative (39.9% of share).

In February, both LPG and CNG cars show decreases: **LPG** cars fell by 18.8% (5.2% of the market) and **CNG** ones fell by 5.4% (2.4% of share); in the 2021 cumulative period, they fell by 17% and 20.3% respectively.

The segment of **hybrid and electric cars** continues to grow: +141.8% in February and +132% in the two-month period. Among these, **mild and full hybrid cars** grew by 145.7% with a market share of 28.9% (it was 10.3% in February 2020). On a cumulative basis, this segment represents the 26.8% of the market. Rechargeable cars sold in February 2021 are 124.5% higher than in February 2020, driven by strong positive changes in both **electric cars** (+36% and 2.4% of share) and **plug-in hybrids** (+307% and 3.5% of share). Together, ECVs (Electric Chargeable Vehicles), or **rechargeable cars**, represent the 5.9% of the February market and 5.3% of the first two months of 2021.

Finally, the excellent performance of Fiat Panda, Lancia Ypsilon and Fiat 500 in their hybrid versions continues, reaching, respectively, first, second and fifth place in the mild/full hybrid segment in February. Among PHEVs, Jeep Compass and Jeep Renegade plug-in take, respectively, first and fourth place in the sales ranking, while Fiat 500 is the best-selling electric model.

Referring to the **market by segments**, in February decreased all except for **large SUVs** (+5.1%) and **luxury** cars (+0.6%). **Super-utility** cars recorded a 5.8% decrease (Fiat Panda and Fiat 500 are again the best-selling models) while **small** cars decreased by 6.9% (Lancia Ypsilon is the best-selling model). Volumes of **lower-medium** cars also decreased (-33%), **medium** (-45%) and **upper-medium** (-1.4%).

SUVs decrease of 6.5% year-over-year (28.5% of SUV registrations are Stellantis Group vehicles), with a 42.6% of market share in February. In detail, **small SUVs** decrease of

[1] Provisional data

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10.2% (Jeep Renegade and Fiat 500X in second and third place), **compact SUVs** decrease of 1.5% (Peugeot 3008 in first place and Jeep Compass in third place), **medium SUVs** decrease of 12.1%, while sales of **large SUVs** are in growth.

There was also a negative change in registrations of **monovolumes**, which fell by 41.5% in February. In the end, **sports** cars decreased by 0.3%.

In the two-month period January-February 2021, registrations in all segments decreased.

According to the ISTAT survey, in February[2] there was an estimated increase in both the **consumer confidence index** (base 2010=100), which goes from 100.7 to 101.4, and the **composite index of business confidence** (Iesi), from 88.3 to 93.2.

Moreover, with reference to consumer confidence, with regard to durable goods, including automobiles, the index relating to the current opportunity to purchase is down with respect to January 2021 (from -42.3 to -47.5).

According to the latest available ISTAT data, in February the **national consumer price index** registered an increase of 0.1% on a monthly basis and 0.6% on an annual basis (up from +0.4% in January). The slight acceleration in inflation is primarily due to the further attenuation of the decline in the prices of unregulated energy goods (in slowdown of from 6.3% in January to 3.6%) and a reversal of the trend in the prices of services relating to transport (in growth from 0.1% to 1.0%).

In the unregulated energy goods segment, looking at the trend in fuel prices, the prices of **Diesel** are slightly in decrease (from -9.4% to -5.5%; +2.4% in the aggregate) and **Petrol** (from -7.5% to -4.0%; +2.1% compared to January), while prices of **Other fuels** accelerated to +1%, from a zero change in the previous year (+2.3% in the aggregate).

The **Stellantis Group**, in the overall, registered 59,153 vehicles in the month (in slowdown of 13%) with a market share of 41.4%. Positive trend for the Citroen brand (+2.6%).

In cumulative terms since the beginning of 2021, total registrations reached 111,916 units (-17.3%), with a market share of 40.4%.

There are eight models of the Stellantis Group in the **February top ten**, with Fiat Panda always leading the ranking (13,368 units), followed, in second place, by Lancia Ypsilon (3,866), which gains one position, and, in fifth place, by Citroen C3 (3,651),

[2] Starting from January 2021, Istat changes the methodology for estimating consumer survey variables. Time series of response percentage frequencies, balances, and climates have been calculated with the new estimator by calibration and are made available beginning in January 1998.

stable. In sixth place is Opel Corsa (3,531), which maintains the same position as in January 2021, followed, in seventh, by Jeep Renegade (3,380) and, in eighth, by Fiat 500X (3,333), which gains three positions. Peugeot 208 (3,204) and Peugeot 2008 (2,932) close the top ten, in ninth and tenth place respectively.

The **second-hand car market** reached 303,046 transfers of ownership before mini transfers to dealers in February 2021, showing a decrease of 10% with respect to February 2020. In the first two months of 2021, there were 562,290 transfers of ownership, the 16.8% less than in the same period of 2020.

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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
5,546 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 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*

MARCA/MAKE	FEBBRAIO *FEBRUARY*				VAR. % *% CHG.*	GENNAIO/FEBBRAIO *JANUARY/FEBRUARY*				VAR. % *% CHG.*
	2021	%	2020	%	*21/20*	2021	%	2020	%	*21/20*
STELLANTIS Group*	***59.153***	***41,4***	***68.006***	***41,7***	***-13,0***	***111.916***	***40,4***	***135.266***	***42,4***	***-17,3***
FIAT	22.769	15,9	27.822	17,1	-18,2	42.996	15,5	53.680	16,8	-19,9
PEUGEOT	10.671	7,5	10.822	6,6	-1,4	19.866	7,2	20.691	6,5	-4,0
CITROEN	8.243	5,8	8.033	4,9	+2,6	15.369	5,5	16.887	5,3	-9,0
OPEL	6.671	4,7	6.981	4,3	-4,4	11.969	4,3	14.855	4,7	-19,4
JEEP	5.601	3,9	5.652	3,5	-0,9	11.111	4,0	11.651	3,7	-4,6
LANCIA	3.866	2,7	5.948	3,6	-35,0	7.914	2,9	12.201	3,8	-35,1
ALFA ROMEO	865	0,6	1.904	1,2	-54,6	1.801	0,6	3.704	1,2	-51,4
DS	361	0,3	691	0,4	-47,8	643	0,2	1.306	0,4	-50,8
MASERATI	106	0,1	153	0,1	-30,7	247	0,1	291	0,1	-15,1
VW Group	***21.893***	***15,3***	***28.429***	***17,4***	***-23,0***	***43.259***	***15,6***	***53.879***	***16,9***	***-19,7***
VOLKSWAGEN	10.969	7,7	16.215	9,9	-32,4	22.133	8,0	31.247	9,8	-29,2
AUDI	5.554	3,9	5.849	3,6	-5,0	10.739	3,9	10.863	3,4	-1,1
SKODA	2.823	2,0	2.813	1,7	+0,4	5.586	2,0	5.444	1,7	+2,6
SEAT	1.972	1,4	2.886	1,8	-31,7	3.591	1,3	5.001	1,6	-28,2
PORSCHE	545	0,4	636	0,4	-14,3	1.160	0,4	1.262	0,4	-8,1
LAMBORGHINI	30	0,0	30	0,0	+0,0	50	0,0	62	0,0	-19,4
RENAULT Group	***11.085***	***7,8***	***14.164***	***8,7***	***-21,7***	***22.948***	***8,3***	***27.250***	***8,5***	***-15,8***
RENAULT	6.577	4,6	9.884	6,1	-33,5	13.475	4,9	17.317	5,4	-22,2
DACIA	4.508	3,2	4.280	2,6	+5,3	9.473	3,4	9.933	3,1	-4,6
FORD	***9.623***	***6,7***	***10.793***	***6,6***	***-10,8***	***18.559***	***6,7***	***19.912***	***6,2***	***-6,8***
TOYOTA Group	***8.461***	***5,9***	***8.101***	***5,0***	***+4,4***	***17.484***	***6,3***	***15.710***	***4,9***	***+11,3***
TOYOTA	7.969	5,6	7.544	4,6	+5,6	16.533	6,0	14.782	4,6	+11,8
LEXUS	492	0,3	557	0,3	-11,7	951	0,3	928	0,3	+2,5
HYUNDAI Group	***7.334***	***5,1***	***8.118***	***5,0***	***-9,7***	***13.991***	***5,0***	***16.267***	***5,1***	***-14,0***
HYUNDAI	3.611	2,5	3.562	2,2	+1,4	7.083	2,6	7.251	2,3	-2,3
KIA	3.723	2,6	4.556	2,8	-18,3	6.908	2,5	9.016	2,8	-23,4
BMW Group	***6.350***	***4,4***	***6.939***	***4,3***	***-8,5***	***13.416***	***4,8***	***13.896***	***4,4***	***-3,5***
BMW	4.922	3,4	5.142	3,2	-4,3	10.384	3,7	10.500	3,3	-1,1
MINI	1.428	1,0	1.797	1,1	-20,5	3.032	1,1	3.396	1,1	-10,7
DAIMLER Group	***4.476***	***3,1***	***5.129***	***3,1***	***-12,7***	***9.605***	***3,5***	***9.603***	***3,0***	***+0,0***
MERCEDES	3.875	2,7	4.797	2,9	-19,2	8.555	3,1	8.969	2,8	-4,6
SMART	601	0,4	332	0,2	+81,0	1.050	0,4	634	0,2	+65,6
SUZUKI	***4.955***	***3,5***	***3.210***	***2,0***	***+54,4***	***8.415***	***3,0***	***6.063***	***1,9***	***+38,8***
NISSAN	***2.764***	***1,9***	***3.714***	***2,3***	***-25,6***	***5.209***	***1,9***	***7.046***	***2,2***	***-26,1***
VOLVO	***1.742***	***1,2***	***1.412***	***0,9***	***+23,4***	***3.300***	***1,2***	***2.884***	***0,9***	***+14,4***
JAGUAR LAND ROVER Grou	***1.235***	***0,9***	***1.598***	***1,0***	***-22,7***	***2.167***	***0,8***	***4.013***	***1,3***	***-46,0***
LAND ROVER	932	0,7	1.161	0,7	-19,7	1.691	0,6	2.984	0,9	-43,3
JAGUAR	303	0,2	437	0,3	-30,7	476	0,2	1.029	0,3	-53,7
MAZDA	***1.195***	***0,8***	***1.041***	***0,6***	***+14,8***	***2.142***	***0,8***	***2.269***	***0,7***	***-5,6***
HONDA	***652***	***0,5***	***762***	***0,5***	***-14,4***	***1.110***	***0,4***	***1.502***	***0,5***	***-26,1***
DR	***620***	***0,4***	***215***	***0,1***	***+188,4***	***989***	***0,4***	***524***	***0,2***	***+88,7***
MITSUBISHI	***361***	***0,3***	***562***	***0,3***	***-35,8***	***691***	***0,2***	***1.248***	***0,4***	***-44,6***
SUBARU	***187***	***0,1***	***274***	***0,2***	***-31,8***	***339***	***0,1***	***421***	***0,1***	***-19,5***
TESLA	***281***	***0,2***	***258***	***0,2***	***+8,9***	***337***	***0,1***	***356***	***0,1***	***-5,3***
FERRARI	***54***	***0,0***	***47***	***0,0***	***+14,9***	***100***	***0,0***	***122***	***0,0***	***-18,0***
ALTRE	***577***	***0,4***	***352***	***0,2***	***+63,9***	***1.168***	***0,4***	***760***	***0,2***	***+53,7***
TOTALE MERCATO	142.998	100,0	163.124	100,0	-12,3	277.145	100,0	318.991	100,0	-13,1

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 28/02/2021

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

ITALIA - IMMATRICOLAZIONI AUTOVETTURE - Top ten
ITALY - NEW CAR REGISTRATIONS - Top ten

dati provvisori/*provisional data*

TOP 10

N.	MARCA *Make*	MODELLO *Model*	FEBBRAIO 2021[1] *FEBRUARY 2021*
1	FIAT	PANDA	13.368
2	LANCIA	YPSILON	3.866
3	FORD	PUMA	3.842
4	TOYOTA	YARIS	3.695
5	CITROEN	C3	3.651
6	OPEL	CORSA	3.531
7	JEEP	RENEGADE	3.380
8	FIAT	500X	3.333
9	PEUGEOT	208	3.204
10	PEUGEOT	2008	2.932

N.	MARCA *Make*	MODELLO *Model*	GEN/FEB 2021 *JAN/FEB 2021*
1	FIAT	PANDA	25.484
2	TOYOTA	YARIS	8.073
3	LANCIA	YPSILON	7.912
4	CITROEN	C3	7.055
5	JEEP	RENEGADE	6.823
6	OPEL	CORSA	6.755
7	FORD	PUMA	6.409
8	PEUGEOT	208	6.391
9	FIAT	500[2]	6.351
10	FIAT	500X	5.950

Fonte: CED - Ministero dei Trasporti

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 28/02/2021

[1] Con versione Elettrica e marchio Abarth, non comprese nella top10 del Ministero, Fiat 500 occuperebbe la settima posizione

[2] Comprende versione Elettrica e marchio Abarth

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