Press Release

THE AUTOMOTIVE MARKET WAS STILL IN TROUBLE IN JUNE, DOWN 13.3% COMPARED TO JUNE 2019

Compared to June 2020 (+12.6%), the improvement is smaller than in previous months and amounts to just over 16,000 units, while compared to June 2019, almost 23,000 new registrations were lost.
The priority, therefore, remains to support domestic demand, starting with the refinancing of purchase incentives for the 61-135 g/km CO_2 bracket

Turin, 1st July 2021 – According to data published today by the Ministry of Infrastructure and Sustainable Mobility, in June 2021, the Italian car market totalled 149,438 new registrations (+12.6%) compared to the 132,691 units recorded in June 2020, which, despite some first faint signs of recovery, primarily due to the clearance of outstanding orders before the lockdown of dealers, closed at -23.1%. If we compare the market with June 2019, new passenger cars were down 13.3%.

Registered volumes in the first half of 2021 totalled 884,750 units, 51.4% higher than volumes in the January to June 2020 period (-18.3% compared to the first half of 2019).

"Continuing the trend of the previous three months, even the positive market result for June 2021 was the result of a comparison with June 2020 that was still in double-digit decline (-23.1%) - **said Paolo Scudieri, President of ANFIA**. *Similarly, growth during the first half-year (+51.4%) was due, in part, to the comparison with low volumes of January to June 2020, a period which, except for January and February, was heavily impacted by restrictive measures against the pandemic, as well as the economic crisis and climate of uncertainty that ensued, slowing down the recovery of sales even after the end of the 41-day lockdown.*

To return to healthy market levels for a country like Italy, it is a priority to continue supporting domestic demand, starting with refinancing purchase incentives for the 61-135 g/Km CO_2 bracket, which expired too early trigger a natural recovery in the sector. The figures speak for themselves: comparing the first two months of 2021, with the incentives in place, and the first two months of last year, not yet affected by the effects of the pandemic, additional sales volumes of low-emission cars are expected to be 40,000 units, i.e. 28% more, which also means a decisive push to renew the oldest and most polluting vehicle fleet and essential support for companies operating in the supply chain, still affected by extensive use of temporary lay-offs.

The refinancing of incentives for the current year must be appropriate and not ephemeral and must be coupled with scrapping to replicate and strengthen the positive effects already experienced, partly thanks to the high level of consumer satisfaction.

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The same applies to the renewal of incentives to purchase the latest generation of light commercial vehicles to replace older ones, favouring a paradigm shift in urban logistics towards increasingly efficient and sustainable standards.

As reiterated by Minister Giorgetti at a recent automotive roundtable, hopefully, the amendments on the refinancing of the measure for the whole of 2021, presented during its conversion into law of DL Sostegni Bis, currently being discussed by the Budget Committee of the Chamber of Deputies, will be approved by Parliament".

Looking at registrations by **fuel type** in detail[1], the decline of diesel and petrol cars continues, with their share of the market gradually shrinking, favouring hybrids and electric vehicles.

With diesel cars down 29.3% in June for the fifth consecutive month, they did not exceed the 25% share threshold and accounted for only 22.3% of the month's market and 23.8% of the market for the first six months of 2021 (it was 34.7% in the first half of 2020). The petrol car market was also down -14.4% and 30.4% share in June, but up 13.1% in the first six months, with 32.3% share.

On the other hand, registration of alternatively fuelled cars reached a market share of 47.4% in June, up 116.7%, and 43.9% in the first half of the year, up 19.3%. Electrified cars accounted for more than a third of the market (36.8% for the month and 35.2% for the year). Of these, non-rechargeable hybrids were up 152.8% in June and accounted for 27.1% of the market for the month (a higher share than diesel for the fifth consecutive month) and 27.3% overall. Rechargeable vehicles, up 273.9% during the sixth month, accounting for 9.7% share in June and 7.8% in the half-year period (plug-in hybrids 5% in the month and 4.4% cumulatively, and electrics 4.7% and 3.4% in the half-year). Finally, gas-powered vehicles accounted for 10.6% of the market in the sixth month of 2021 and 8.7% of the market in the first half of the year, with LPG cars accounting for 8.2% in the month and 6.4% in the year-to-date period and CNG cars for 2.4% in the month and 2.3% in the first six months.

The excellent performance of Fiat Panda, Lancia Ypsilon and Fiat 500 hybrids continued, occupying first, second and fourth place respectively in the mild/full hybrid segment. In addition, Jeep Compass topped the sales charts among PHEVs, both in June and in the six months, while Fiat 500 remains the best-selling electric model in the first half of 2021.

In terms of **market share by segment**, small and super-utility cars accounted for 39.8% of the market in June, while in the first six months of this year, their share was 39.9%. The best-selling model is still the Fiat Panda, with Lancia Ypsilon and Fiat 500

[1] Provisional Data

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occupying third and fourth positions. Cars in the middle segments had a market share of 11.9% in June and 11.4% in the first half of 2021, with Fiat Tipo in the first place, both in the month and since the beginning of the year.

SUVs have a 42.2% market share in June and 43.3% cumulative. In detail, small SUVs accounted for 19.6% of the month's market (Fiat 500X the best-selling model, with Jeep Renegade in fourth place and Peugeot 2008 in fifth), compact SUVs 16.9% (Jeep Compass in first place and Peugeot 3008 in third place), medium SUVs 4.7%, while sales of large SUVs accounted for 1.1% of the total. Stellantis Group cars account for 28.8% of SUV sales.

MPVs accounted for 3.4% of the market in June and 3.9% in the year's first half. Lastly, sports, executive, and luxury cars represented 0.9% of sales for the month and 1% for the year as a whole.

According to the ISTAT survey, in June[2] it is estimated that there was a marked increase in both the **consumer confidence index** (base 2010=100), from 110.6 to 115.1, and the **composite business confidence index** (Iesi), from 107.3 to 112.8.

In addition, concerning consumer confidence in durable goods, including automobiles, the index for current purchasing opportunities rose sharply compared to May 2021 (from -23.4 to -5.7).

According to the latest ISTAT data, the national **consumer price index** increased by 0.1% month-on-month and 1.3% year-on-year in June (as in the previous month). Inflation was mainly due to sustained growth in the prices of energy goods (from +13.8% in May to +14.1%), both the regulated (from +16.8% to +16.9%) and the non-regulated (from +12.6% to +12.8%) components.

In the latter sector, looking at trends in fuel prices, there was a further increase in **diesel** prices (from +15.1% to +15.6%; +0.9% on the previous month), **petrol** (from +16.1% in May to +16.2%; +0.8% compared to the last month), and the prices of **other fuels** (from +9.2% to +9.9%; -0.2% compared to May).

Overall, the **Stellantis Group** registered 56,554 vehicles (+19.5%) in the month, with a market share of 37.8% (35.7% in June 2020).

Cumulatively since the beginning of 2021, the Group's total registrations amounted to 351,954 units (+52.3%), with a market share of 39.8% (39.5% in H1 2020).

[2] As of January 2021, Istat has changed the forecasting methodology for consumer survey variables. The historical series of response percentage frequencies, balances, and climates are now calculated with the new calibration estimator, made available from January 1998.

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There are seven Stellantis Group models in the **June top ten**, with Fiat Panda still leading the list (10,897 units), followed in third place by Lancia Ypsilon (4,333) and in fourth place by Jeep Compass (3,604), which climbs two places from the May list. In fifth place was Fiat 500X (3,448), followed in seventh place by Opel Corsa (3,263) and in ninth by Citroen C3 (3,115). Finally, Jeep Renegade (2,726) closes the top ten.

The **used car market** totalled 304,025 transfers of ownership before mini-transfers to dealers in June 2021, 22.8% more than in June 2020. In the first six months of 2021, there were 1,771,835 transfers of ownership, up 36.7% compared to the same period in 2020.

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ANFIA – Italian Association of the Automotive Industry
Founded in March 1912, over the plus one hundred years, ANFIA's mission has always been to represent the best interests of its associate members and to ensure effective communication between Italian motor vehicle industries on the one hand and Public Administration and Italian political bodies on the other, concerning all technical, economic, fiscal, legal, statistical and quality-related issues referring 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 and 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 motorization.

Comunicato Stampa

ITALIA - IMMATRICOLAZIONI AUTOVETTURE
ITALY - NEW CAR REGISTRATIONS

dati provvisori/*provisional data*

	GIUGNO *JUNE*				VAR. % *% CHG.*	GENNAIO/GIUGNO *JANUARY/JUNE*				VAR. % *% CHG.*
MARCA/MAKE	2021	%	2020	%	*21/20*	2021	%	2020	%	*21/20*
STELLANTIS Group*	***56.554***	***37,8***	***47.307***	***35,7***	***+19,5***	***351.954***	***39,8***	***231.036***	***39,5***	***+52,3***
FIAT	22.191	14,8	18.589	14,0	+19,4	138.713	15,7	90.024	15,4	+54,1
PEUGEOT	8.068	5,4	7.237	5,5	+11,5	56.552	6,4	36.169	6,2	+56,4
CITROEN	7.248	4,9	5.707	4,3	+27,0	45.173	5,1	28.675	4,9	+57,5
OPEL	6.433	4,3	4.826	3,6	+33,3	37.451	4,2	24.759	4,2	+51,3
JEEP	6.511	4,4	5.381	4,1	+21,0	37.400	4,2	23.109	4,0	+61,8
LANCIA	4.333	2,9	3.508	2,6	+23,5	27.104	3,1	18.770	3,2	+44,4
ALFA ROMEO	1.096	0,7	1.530	1,2	-28,4	6.230	0,7	6.825	1,2	-8,7
DS	502	0,3	385	0,3	+30,4	2.436	0,3	2.153	0,4	+13,1
MASERATI	172	0,1	144	0,1	+19,4	895	0,1	552	0,1	+62,1
VW Group	***26.650***	***17,8***	***22.862***	***17,2***	***+16,6***	***146.486***	***16,6***	***98.674***	***16,9***	***+48,5***
VOLKSWAGEN	13.644	9,1	11.450	8,6	+19,2	76.356	8,6	54.080	9,3	+41,2
AUDI	6.556	4,4	5.856	4,4	+12,0	35.922	4,1	21.848	3,7	+64,4
SKODA	2.910	1,9	2.560	1,9	+13,7	16.977	1,9	10.684	1,8	+58,9
SEAT	3.002	2,0	2.264	1,7	+32,6	13.738	1,6	9.187	1,6	+49,5
PORSCHE	497	0,3	693	0,5	-28,3	3.303	0,4	2.730	0,5	+21,0
LAMBORGHINI	41	0,0	39	0,0	+5,1	190	0,0	145	0,0	+31,0
RENAULT Group	***15.675***	***10,5***	***16.029***	***12,1***	***-2,2***	***73.155***	***8,3***	***57.496***	***9,8***	***+27,2***
RENAULT	8.716	5,8	9.630	7,3	-9,5	42.042	4,8	35.337	6,0	+19,0
DACIA	6.959	4,7	6.399	4,8	+8,8	31.113	3,5	22.159	3,8	+40,4
TOYOTA Group	***8.881***	***5,9***	***7.952***	***6,0***	***+11,7***	***53.157***	***6,0***	***29.625***	***5,1***	***+79,4***
TOYOTA	8.377	5,6	7.557	5,7	+10,9	50.467	5,7	27.871	4,8	+81,1
LEXUS	504	0,3	395	0,3	+27,6	2.690	0,3	1.754	0,3	+53,4
FORD	***5.846***	***3,9***	***8.876***	***6,7***	***-34,1***	***51.892***	***5,9***	***37.657***	***6,4***	***+37,8***
HYUNDAI Group	***9.285***	***6,2***	***5.986***	***4,5***	***+55,1***	***46.933***	***5,3***	***29.538***	***5,1***	***+58,9***
HYUNDAI	5.228	3,5	2.992	2,3	+74,7	24.218	2,7	13.422	2,3	+80,4
KIA	4.057	2,7	2.994	2,3	+35,5	22.715	2,6	16.116	2,8	+40,9
BMW Group	***6.682***	***4,5***	***6.305***	***4,8***	***+6,0***	***41.664***	***4,7***	***26.356***	***4,5***	***+58,1***
BMW	4.891	3,3	4.637	3,5	+5,5	31.001	3,5	19.767	3,4	+56,8
MINI	1.791	1,2	1.668	1,3	+7,4	10.663	1,2	6.589	1,1	+61,8
DAIMLER Group	***5.355***	***3,6***	***5.329***	***4,0***	***+0,5***	***32.981***	***3,7***	***20.685***	***3,5***	***+59,4***
MERCEDES	4.624	3,1	5.012	3,8	-7,7	29.003	3,3	19.206	3,3	+51,0
SMART	731	0,5	317	0,2	+130,6	3.978	0,4	1.479	0,3	+169,0
SUZUKI	***3.383***	***2,3***	***3.306***	***2,5***	***+2,3***	***23.481***	***2,7***	***13.469***	***2,3***	***+74,3***
NISSAN	***2.080***	***1,4***	***2.133***	***1,6***	***-2,5***	***15.169***	***1,7***	***11.527***	***2,0***	***+31,6***
VOLVO	***2.615***	***1,7***	***1.908***	***1,4***	***+37,1***	***12.087***	***1,4***	***6.999***	***1,2***	***+72,7***
JAGUAR LAND ROVER Grou	***1.404***	***0,9***	***1.379***	***1,0***	***+1,8***	***9.986***	***1,1***	***7.319***	***1,3***	***+36,4***
LAND ROVER	966	0,6	1.121	0,8	-13,8	7.347	0,8	5.635	1,0	+30,4
JAGUAR	438	0,3	258	0,2	+69,8	2.639	0,3	1.684	0,3	+56,7
MAZDA	***1.081***	***0,7***	***1.024***	***0,8***	***+5,6***	***6.841***	***0,8***	***4.160***	***0,7***	***+64,4***
DR	***768***	***0,5***	***297***	***0,2***	***+158,6***	***3.646***	***0,4***	***1.091***	***0,2***	***+234,2***
HONDA	***529***	***0,4***	***646***	***0,5***	***-18,1***	***3.414***	***0,4***	***2.697***	***0,5***	***+26,6***
TESLA	***984***	***0,7***	***384***	***0,3***	***+156,3***	***3.135***	***0,4***	***1.350***	***0,2***	***+132,2***
MITSUBISHI	***381***	***0,3***	***343***	***0,3***	***+11,1***	***2.368***	***0,3***	***1.954***	***0,3***	***+21,2***
SUBARU	***189***	***0,1***	***221***	***0,2***	***-14,5***	***1.230***	***0,1***	***911***	***0,2***	***+35,0***
FERRARI	***51***	***0,0***	***74***	***0,1***	***-31,1***	***327***	***0,0***	***272***	***0,0***	***+20,2***
ALTRE	***1.045***	***0,7***	***330***	***0,2***	***+216,7***	***4.844***	***0,5***	***1.421***	***0,2***	***+240,9***

TOTALE MERCATO	149.438	100,0	132.691	100,0	+12,6	884.750	100,0	584.237	100,0	+51,4

Fonte: CED - Ministero delle Infrastrutture e della Mobilità sostenibili

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 30/06/2021

* 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*	GIUGNO 2021[1] *JUNE 2021*
1	FIAT	PANDA	10.897
2	DACIA	SANDERO	4.366
3	LANCIA	YPSILON	4.333
4	JEEP	COMPASS	3.604
5	FIAT	500X	3.448
6	TOYOTA	TOYOTA YARIS	3.401
7	OPEL	CORSA	3.263
8	VOLKSWAGEN	T-ROC	3.137
9	CITROEN	C3	3.115
10	JEEP	RENEGADE	2.726

N.	MARCA *Make*	MODELLO *Model*	GEN/GIU 2021 *JAN/GIU 2021*
1	FIAT	PANDA	67.164
2	FIAT	500[2]	28.254
3	LANCIA	YPSILON	27.106
4	TOYOTA	YARIS	23.236
5	FIAT	500X	22.821
6	JEEP	RENEGADE	21.698
7	CITROEN	C3	20.421
8	FORD	PUMA	19.875
9	OPEL	CORSA	18.487
10	VOLKSWAGEN	T-ROC	17.868

Fonte: CED - Ministero delle Infrastrutture e della Mobilità sostenibili

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 30/06/2021

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

[2] Comprende versione Elettrica e marchio Abarth

Associazione Nazionale Filiera Industria Automobilistica

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