Press release

JULY DOWN 19.4%: THE LACK OF GOVERNMENT INCENTIVES WAS THE MAIN REASON, THE COMPARISON WITH A JULY 2020 THAT SHOWED THE FIRST SIGNS OF RECOVERY COMPARED TO THE EARLIER SHARP FALLS AND THE TRADITIONALLY LOW VOLUMES TYPICAL OF THE SUMMER MONTHS

For the first time, the share of non-rechargeable hybrids, which for six consecutive months has been higher than the share of diesel, was 29.4% and exceeded that of petrol cars for the first time. The refinancing of incentives is essential: contributions to the purchase of new cars in the 61-135 g/km CO_2 emission bracket, with the scrapping of the old car, and extrabonus contributions for cars with emissions between 0 and 60 g/km of CO_2, have started today, while the ecobonus fund, a measure that has worked well given the steady increase in registrations of rechargeable cars, needs to be immediately reinstated

Turin, 2nd August 2021 – According to data published today by the Ministry of Infrastructure and Sustainable Mobility, in July 2021, the Italian car market totalled 110,292 registrations (-19.4%) compared to 136,768 units registered in July 2020. If we compare the market with that of July 2019, new cars were down 28.1%.

The volumes registered in the first seven months of 2021 thus totalled 995,239 units, 38% more than the volumes recorded in the January-July 2020 period (-19.5% compared to January-July 2019).

"The poor result in July, besides being typical of a month in which we were still waiting for the refinancing of incentives for the 61-135 g/km CO_2 bracket, also stems from a comparison with July 2020 which, despite having closed at -11%, showed the first signs of recovery compared to the very severe downturns of the previous months - **said Paolo Scudieri, President of ANFIA**. *On top of that, we are in the summer season, characterised by traditionally low volumes.*
For the coming months, we are relying on the fiscal stimulus provided by the incentives just renewed: contributions towards the purchase of new cars in the 61-135 g/km of CO_2 emission bracket, with the scrapping of an old car, and those related to the extrabonus for cars with emissions between 0 and 60 g/km of CO_2 are now in place. Furthermore, as of 5th August, incentives for purchasing new light commercial vehicles will also come into force, finally giving support to this sector.

These measures are significant, both for market recovery and the continuation of the process of decarbonising the vehicle fleet and for the significant economic impact on the manufacturing supply chain - including components - at a critical time of industrial transition that also bears the signs of the pandemic crisis. Therefore, it is no *coincidence" - **concludes Scudieri** - "that at the first automotive round table specifically dedicated to the transition of the manufacturing supply chain, held at the Ministry of Economic Development on 29th July, we reiterated how crucial it is to provide continuity to the measures supporting demand while waiting for a strategic plan to be launched for the industrial restructuring of the sector.*

Looking at registrations by **fuel type** in detail[1], diesel and petrol cars continue to decline, with their share of the market gradually shrinking in favour of hybrids and electric vehicles. In July, the percentage of non-rechargeable hybrids exceeded that of petrol cars for the first time and was the highest category on the market, having already exceeded diesel for the past six months.

Diesel cars, down 50.9% in July, failed to exceed the 25% share threshold for the sixth consecutive month and accounted for 22.4% of the market for the month and 23.7% of the market in the first seven months of 2021 (it was 35.1% in the same period of 2020). Since the beginning of the year, diesel cars have been the only ones to see their market share drop, with registrations down 7%. The petrol car market saw a decline in registrations for the month, down 42.5% and 27.6% share, compared to a 3.5% increase in the first seven months of the year, with a 31.7% share.

On the other hand, registration of alternatively fuelled cars accounted for exactly half of the total market in July 2021 and 43.9% in the first seven months, up 65.1% for the month and 173.3% since the start of the year. Electrified cars account for more than a third of the market (39.7% for the month and 35.7% year to date). Of these, non-rechargeable hybrids were up 86.7% in July and accounted for 29.4% of the month's market (for the sixth consecutive month, a higher share than diesel and, for the first time, than petrol cars), while they grew 245% year-on-year to 27.6%. Rechargeable vehicles, up 207% in the seventh month, accounted for 10.3% share in July and 8% in the first seven months (plug-in hybrids 5.7% in the month and 4.5% year to date, and electric vehicles 4.6% in the month and 3.6% year to date). Finally, gas-powered cars accounted for 10.4% of the market in the seventh month of 2021 and 8.9% in the first seven months. LPG cars have a market share of 8.4% in the month and 6.6% in the cumulative, and CNG cars 2% in the month and 2.3% in the first seven months. Sales of LPG vehicles grew both in the month (+5.5%) and since the beginning of the year (+43.6%), while sales of CNG vehicles fell by 39.1% in July and increased by 32.1% in the first seven months.

The Fiat Panda, Fiat 500 Hybrid and Lancia Ypsilon continued their excellent performance, taking first, second and fourth place in the mild/full hybrid segment. Among PHEVs, the Jeep Compass and Jeep Renegade took the top two positions in the sales rankings, both in July and cumulatively since the beginning of the year, while the Fiat 500 is the best-selling electric model, both in July and since the beginning of 2021.

[1] Provisional data

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Looking at the **market by segment**, small and super-utility cars accounted for 36% of the market in July, down 13.6%, while in the first seven months of this year, their share was 39.4% (+46.2%). The best-selling model is still Fiat Panda, with Fiat 500 and Lancia Ypsilon in second and third place. On the other hand, cars in the medium segments have a market share of 10% in July (-42%) and 10.8% in the first seven months of 2021 (+14.1%), with Fiat Tipo in the first place since the start of the year.

In July, SUVs had a 48.5% market share, down 14.8%, and accounted for 45.7% of the overall market, up 44.3%. In detail, small SUVs accounted for 23.1% of the market for the month (Fiat 500X the best-selling model, with Jeep Renegade in third place and Peugeot 2008 in sixth) and were down 12.5% compared to July 2020, while growing 51% in the cumulative. Compact SUVs accounted for 19.2% (with Jeep Compass in first place and Peugeot 3008 in third), down 15.2% for the month and up 42.1% for the first seven months of 2021. With a 5% share, Medium SUVs fell 18.7% in July and increased 29% cumulatively, while sales of large SUVs accounted for 1.3% of the total (down 29% in the month and up 26.8% in the first seven months of 2021). Stellantis Group cars accounted for 31.3% of all SUV sales.

MPVs accounted for 2% of the July market and sales in the first seven months and were down both in the month (-55.6%) and in the aggregate (-25.8%). Lastly, sports, premium, and luxury cars accounted for 1.2% for the month and 1% for the year as a whole.

According to the Italian Statistical Office (ISTAT) survey, in July[2] the **consumer confidence inde**x (base 2010=100) is estimated to increase from 115.1 to 116.6 and the **composite business confidence index** (Iesi) from 112.8 to 116.3.

Concerning consumer confidence, moreover, for durable goods, including cars, the index for current purchasing desirability increased again compared to June 2021 (from -5.7 to -3.7).

According to the latest available ISTAT data, the **national consumer price index** recorded an increase of 0.3% monthly and 1.8% on an annual basis (from +1.3% in the previous month). The upward trend in inflation is mainly due to prices of energy goods (from +14.1% to +16.9%) and, in particular, regulated components (from +16.9% to +29%), while the prices of non-regulated components slowed down (from +12.8% to +11.2%).

[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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In the latter segment, looking at the trend in fuel prices, the prices of **diesel** (from +15.6% to +16.2%; +2.6% on a monthly basis), **petrol** (from +16.2% to +16.5%; +2.4% compared to the previous month), and the prices of **other fuels** (from +9.9% to +12.3%; +2.2% compared to June) increased further.

The **Stellantis Group** as a whole registered 39,939 vehicles in the month (-20.1%), with a market share of 36.2%.

In cumulative terms, since the beginning of 2021, the Group's total registrations amounted to 391,952 units (+39.5%), with a market share of 39.4% (it was 39% in the first seven months of 2020).

There are six Stellantis Group models in July's **top ten**, with Fiat Panda still leading the ranking (7,126 units), followed in second place by Jeep Compass (3,234), which recovers two positions from the June ranking, and in third place by Lancia Ypsilon (3,139). In fourth place was the Fiat 500 (2,836), followed in fifth place by the Fiat 500X (2,830) and in eighth place by the Jeep Renegade (2,696).

The **used car market** totalled 313,150 transfers of ownership before mini-transfers to dealers in July 2021, 14.5% more than in July 2020. In the first seven months of 2021, there were 2,084,985 transfers of ownership, up 32.8% on 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*

	LUGLIO *JULY*				VAR. % *% CHG.*	GENNAIO/LUGLIO *JANUARY/JULY*				VAR. % *% CHG.*
MARCA/MAKE	2021	*%*	2020	*%*	*21/20*	2021	*%*	2020	*%*	*21/20*
STELLANTIS Group*	***39.939***	***36,2***	***50.014***	***36,6***	***-20,1***	***391.952***	***39,4***	***281.050***	***39,0***	***+39,5***
FIAT	16.420	14,9	19.560	14,3	-16,1	155.138	15,6	109.584	15,2	+41,6
PEUGEOT	6.159	5,6	7.473	5,5	-17,6	62.721	6,3	43.642	6,1	+43,7
CITROEN	3.411	3,1	4.971	3,6	-31,4	48.590	4,9	33.646	4,7	+44,4
OPEL	3.245	2,9	5.876	4,3	-44,8	40.702	4,1	30.635	4,2	+32,9
JEEP	6.071	5,5	6.157	4,5	-1,4	43.474	4,4	29.266	4,1	+48,5
LANCIA	3.140	2,8	3.640	2,7	-13,7	30.246	3,0	22.410	3,1	+35,0
ALFA ROMEO	938	0,9	1.726	1,3	-45,7	7.195	0,7	8.551	1,2	-15,9
DS	395	0,4	481	0,4	-17,9	2.831	0,3	2.634	0,4	+7,5
MASERATI	160	0,1	130	0,1	+23,1	1.055	0,1	682	0,1	+54,7
VW Group	***19.566***	***17,7***	***26.798***	***19,6***	***-27,0***	***166.070***	***16,7***	***125.472***	***17,4***	***+32,4***
VOLKSWAGEN	10.602	9,6	14.513	10,6	-26,9	86.969	8,7	68.593	9,5	+26,8
AUDI	4.989	4,5	6.255	4,6	-20,2	40.914	4,1	28.103	3,9	+45,6
SKODA	2.095	1,9	2.623	1,9	-20,1	19.074	1,9	13.307	1,8	+43,3
SEAT	1.426	1,3	2.511	1,8	-43,2	15.166	1,5	11.698	1,6	+29,6
PORSCHE	428	0,4	848	0,6	-49,5	3.731	0,4	3.578	0,5	+4,3
LAMBORGHINI	26	0,0	48	0,0	-45,8	216	0,0	193	0,0	+11,9
RENAULT Group	***10.054***	***9,1***	***12.474***	***9,1***	***-19,4***	***83.224***	***8,4***	***69.970***	***9,7***	***+18,9***
RENAULT	5.460	5,0	7.334	5,4	-25,6	47.509	4,8	42.671	5,9	+11,3
DACIA	4.594	4,2	5.140	3,8	-10,6	35.715	3,6	27.299	3,8	+30,8
TOYOTA Group	***6.794***	***6,2***	***6.570***	***4,8***	***+3,4***	***59.978***	***6,0***	***36.195***	***5,0***	***+65,7***
TOYOTA	6.455	5,9	6.059	4,4	+6,5	56.948	5,7	33.930	4,7	+67,8
LEXUS	339	0,3	511	0,4	-33,7	3.030	0,3	2.265	0,3	+33,8
FORD	***5.631***	***5,1***	***9.281***	***6,8***	***-39,3***	***57.535***	***5,8***	***46.937***	***6,5***	***+22,6***
HYUNDAI Group	***7.226***	***6,6***	***7.655***	***5,6***	***-5,6***	***54.179***	***5,4***	***37.193***	***5,2***	***+45,7***
HYUNDAI	3.708	3,4	4.301	3,1	-13,8	27.934	2,8	17.723	2,5	+57,6
KIA	3.518	3,2	3.354	2,5	+4,9	26.245	2,6	19.470	2,7	+34,8
BMW Group	***5.416***	***4,9***	***7.084***	***5,2***	***-23,5***	***47.087***	***4,7***	***33.440***	***4,6***	***+40,8***
BMW	4.042	3,7	5.163	3,8	-21,7	35.050	3,5	24.930	3,5	+40,6
MINI	1.374	1,2	1.921	1,4	-28,5	12.037	1,2	8.510	1,2	+41,4
DAIMLER Group	***4.256***	***3,9***	***5.831***	***4,3***	***-27,0***	***37.253***	***3,7***	***26.516***	***3,7***	***+40,5***
MERCEDES	3.854	3,5	5.411	4,0	-28,8	32.873	3,3	24.617	3,4	+33,5
SMART	402	0,4	420	0,3	-4,3	4.380	0,4	1.899	0,3	+130,6
SUZUKI	***3.025***	***2,7***	***2.131***	***1,6***	***+42,0***	***26.510***	***2,7***	***15.600***	***2,2***	***+69,9***
NISSAN	***2.035***	***1,8***	***2.221***	***1,6***	***-8,4***	***17.205***	***1,7***	***13.748***	***1,9***	***+25,1***
VOLVO	***1.389***	***1,3***	***2.114***	***1,5***	***-34,3***	***13.480***	***1,4***	***9.113***	***1,3***	***+47,9***
JAGUAR LAND ROVER Grou	***1.266***	***1,1***	***1.575***	***1,2***	***-19,6***	***11.253***	***1,1***	***8.894***	***1,2***	***+26,5***
LAND ROVER	898	0,8	1.216	0,9	-26,2	8.245	0,8	6.851	1,0	+20,3
JAGUAR	368	0,3	359	0,3	+2,5	3.008	0,3	2.043	0,3	+47,2
MAZDA	***1.012***	***0,9***	***954***	***0,7***	***+6,1***	***7.855***	***0,8***	***5.114***	***0,7***	***+53,6***
DR	***683***	***0,6***	***323***	***0,2***	***+111,5***	***4.329***	***0,4***	***1.414***	***0,2***	***+206,2***
HONDA	***462***	***0,4***	***641***	***0,5***	***-27,9***	***3.876***	***0,4***	***3.338***	***0,5***	***+16,1***
TESLA	***9***	***0,0***	***52***	***0,0***	***-82,7***	***3.145***	***0,3***	***1.402***	***0,2***	***+124,3***
MITSUBISHI	***285***	***0,3***	***370***	***0,3***	***-23,0***	***2.653***	***0,3***	***2.324***	***0,3***	***+14,2***
SUBARU	***192***	***0,2***	***197***	***0,1***	***-2,5***	***1.424***	***0,1***	***1.108***	***0,2***	***+28,5***
FERRARI	***80***	***0,1***	***83***	***0,1***	***-3,6***	***408***	***0,0***	***355***	***0,0***	***+14,9***
ALTRE	***972***	***0,9***	***400***	***0,3***	***+143,0***	***5.823***	***0,6***	***1.821***	***0,3***	***+219,8***
TOTALE MERCATO	110.292	100,0	136.768	100,0	-19,4	995.239	100,0	721.004	100,0	+38,0

Fonte: CED - Ministero delle Infrastrutture e della Mobilità sostenibili

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/07/2021

* 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*	LUGLIO 2021[1] *JULY 2021*
1	FIAT	PANDA	7.126
2	JEEP	COMPASS	3.234
3	LANCIA	YPSILON	3.139
4	FIAT	500	2.836
5	FIAT	500X	2.830
6	TOYOTA	TOYOTA YARIS	2.770
7	VOLKSWAGEN	T-CROSS	2.762
8	JEEP	RENEGADE	2.696
9	DACIA	SANDERO	2.523
10	FORD	PUMA	2.518

N.	MARCA *Make*	MODELLO *Model*	GEN/LUG 2021 *JAN/LUG 2021*
1	FIAT	PANDA	74.303
2	FIAT	500[2]	32.230
3	LANCIA	YPSILON	30.247
4	TOYOTA	YARIS	26.100
5	FIAT	500X	25.656
6	JEEP	RENEGADE	24.402
7	FORD	PUMA	22.401
8	CITROEN	C3	21.373
9	VOLKSWAGEN	T-ROC	19.832
10	OPEL	CORSA	19.624

Fonte: CED - Ministero delle Infrastrutture e della Mobilità sostenibili

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/07/2021

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

[2] Comprende versione Elettrica e marchio Abarth

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