Press Release

MICROCHIPS CRISIS FORCED THE ITALIAN CAR MARKET TO A NEW DOUBLE-DIGIT DECREASE: -24.6% IN NOVEMBER

It is essential to imagine a structural plan with an appropriate budget to prevent Italy, in this delicate phase in which market policies are fundamental, from being the only European country not to guide and support consumers in the purchase of zero and ultra-low emission cars.
ANFIA welcomes the presentation, by various political forces, of amendments to the Budget Law to refine its approach to the market, of amendments to the Budget Law to refinance the incentives, currently exhausted, to support the demand for cars and light commercial vehicles with low environmental impact

Turin, December 1st 2021 – According to data published today by the Ministry of sustainable infrastructures and mobility, in November 2021 the Italian car market reached 104,478 registrations (-24.6%) respect to 138,612 units recorded in November 2020.

Volumes registered in the first eleven months of 2021 reached 1,371,166 units, 8.6% more than the volumes in the period January-November 2020. Respect to 2019, the January-November 2021 period decrease of 22.8%.

"In November the car market shows a double-digit slowdown (-24.6%), even if to a lesser extent than the one registered in October (-35.7%) thanks to an extra working day in November 2021 respect to November 2020 (22 days against 21) - says **Paolo Scudieri**, **ANFIA President**.

In addition to the extension of the semiconductor crisis, there is great concern about the total lack, in the current text of the Budget Law 2022, of measures to address the ecological and energy transition of the sector, since no funds have been allocated to support either demand or supply. It is essential to imagine a structural plan at least over three years and with an appropriate budget to prevent Italy, in this delicate phase in which market policies are fundamental, from being the only European country not to guide and support consumers in the purchase of zero and ultra-low emission cars. We therefore welcome the presentation, by various political forces, of amendments to the Budget Law proposing the refinancing of incentives, currently exhausted, to support the demand for cars and light commercial vehicles with low environmental impact.

Aware of the need to respect the mobility carbon neutrality started by the EU, the timing of the proposed revision of the regulation on the reduction of CO_2 emissions contained in the 'Fit for 55' regulatory package is not in line with the adjustment times of the industry, which also needs to be accompanied in the transition by ad hoc *industrial policies that favor and support investments in production reconversion and to be able to count on the restoration of the principle of technological neutrality.*

With this in mind, ANFIA, together with FEDERAUTO and UNRAE, sent a letter to the Presidency of the Council of Ministers requesting a meeting to show its proposals for the reconversion of the industrial chain, market support and infrastructural development for new technologies".

A detailed analysis of **registrations by fuel**[1] shows that diesel and petrol cars continue to slowdown, with their share of the market gradually decreasing in favor of hybrid and electric cars. In November, the share of non-rechargeable hybrid cars was the highest on the market.

Diesel cars, in slowdown of 52% in November, represent the 18.1% of the month's market and 22.3% of the one in the first eleven months of 2021 (it was 33.4% in the same period of 2020). Since the beginning of the year, diesel cars market decrease the most, with registrations down b 27.5%. The Petrol car market is also in slowdown, with -34.4% and 27.3% of share in November and -14.3% in the first eleven months, with 30.2% share.

Alternative-fuel car registrations, on the other hand, represent the 54.6% of the November 2021 market and the 47.5% in the first eleven months, in growth of 2.5% for the month and of 82.4% since the beginning of the year. Electrified cars represent the 43.4% of the November market and the 38.1% in the first eleven months. Among these, non-rechargeable hybrids increased of 2.7% in November reaching the 31.6% of share, while grow of 102% in the cumulate with the 28.9% of share. Rechargeable, increase of 171% in the eleventh month of the year, reaching the 11.8% of share in November and the 9.1% in the first eleven months (plug-in hybrids 5.2% in the month and 4.7% in the cumulative, and electrics 6.6% in the month and 4.5% in the cumulative). In the end, petrol cars represent the 11.2% of the market in the eleventh month of 2021 and the 9.5% of the market in the first eleven months and, among these, LPG cars had a market share of 9.4% in the month and 7.3% in the cumulative and CNG cars had 1.8%, in the month and 2.2% in the first eleven months. Sales of LPG cars decreased in the month (-11.3%), and have grown since the beginning of the year (+15.6%), while CNG cars decreased 31% in November and increased 4.2% in the cumulative period.

The excellent performance of Fiat Panda, Lancia Ypsilon and Fiat 500 hybrids continues, occupying, respectively, first, second and fourth place in the mild/full hybrid segment in the month and the first three positions since the beginning of 2021. Among PHEVs, Jeep Compass is the best-selling model, both in November and in the first eleven months, while Fiat 500 is the best-selling electric model in November and since the beginning of 2021.

[1] Temporary Data

Referring to the **market by segments**, in November, utility and super-utility cars represent the 38.4% of the market, in slowdown of 29.9%, while in the first eleven months of this year their share was 39.4%, in growth of 10.6%. The best-selling model is still Fiat Panda, with Lancia Ypsilon and Fiat 500 occupying second and third positions. Cars in the middle segments have a market share of 8.3% in November (-48.3%) and 11.1% in the first eleven months of 2021 (-8.6%), with Fiat Tipo in first place in the month and since the beginning of the year.

SUVs reached a market share of 48.1% in November, in slowdown of 16.6%, and represent the 46.4% of the market in the cumulative, in growth of 13.7%. In detail, small SUVs represent the 22.1% of the market for the month, in slowdown of 21.3% from November 2020, while growing 13.8% in the cumulative. Compact SUVs represent the 19.8%, in slowdown of 10.4% for the month and in growth of 14.4% over the first eleven months of 2021. Medium SUVs, with a 5% share, decrease of 18.3% in the month, growing of 11.4% in the cumulative, while large SUV sales are 1.2% of the total (in decrease of 11.3% in the month and in growth of 12.7% in the first eleven months of 2021). Stellantis Group passenger cars represent the 22.7% of SUV sales.

MPVs accounted for 1.9% in November and 2.1% in the first eleven months and were down both in the month (-38.3%) and aggregate (-22%).

According to the ISTAT survey, in November[2] the **consumer confidence index** (base 2010=100) is estimated to decrease from 118.4 to 117.5, while the **composite index of business confidence (Iesi)** remains substantially stable (from 115.0 to 115.1).

Referring to the consumer confidence, moreover, with regard to durable goods, including automobiles, the index relating to the current opportunity to purchase is in slowdown in respect to October 2021 (from -21.3 to -25.8).

According to preliminary ISTAT estimates, in November **the national consumer price index** grow of 0.7% on a monthly basis and 3.8% on an annual basis (in increase from +3% of the previous month). The further acceleration in inflation is largely due to the prices of energy goods (in growth from +24.9% in October to +30.7%) and, in particular, those of the non-regulated component (in increase from +15.0% to +24.3%), while the regulated component slowed slightly (from +42.3% to +41.8%).

In the sector of unregulated energy goods, looking at the trend in fuel prices, **diesel** prices accelerated (from +23.5% to +27.9%; in growth of 3.0% on the previous month), as did those of **petrol** (from +22.1% to +25.3%; up 2.2% on the previous month), and prices of **other fuels** (from +33.0% to +45.8%; up 10.0% on October).

[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.

The **Stellantis Group**, in the overall, reached 36,482 registrations in the month (-33.3%), with a market share of 34.9%.

In cumulative terms since the beginning of 2021, the Group's total registrations reached 519,525 units (+6.4%), with a market share of 37.9%.

There are five Stellantis Group models in the **November top ten**, with Fiat Panda always leading the ranking (8,737 units), followed, in second place, by Lancia Ypsilon (3,207) and, in seventh place, by Citroen C3 (2,396). In eighth place is the Jeep Compass (2,108), while, in tenth place, is the Jeep Renegade (2,004).

In the end, the **second-hand car market** reached 290,382 transfers of ownership before mini-transfers to dealers as of November 2021, 1.8% lower than November 2020. In the first eleven months of 2021, there are 3,177,757 ownership transfers, in growth of 15.9% respect the same period in 2020.

For more information: ANFIA Press Office
Miriam Gangi – m.gangi@anfia.it
Ph. +39 011 5546502
Mob. +39 338 7303167

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.

www.anfia.it/it/

twitter.com/ANFIA_it

www.linkedin.com/company/anfia-it/

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*

	NOVEMBRE *NOVEMBER*				VAR. % *% CHG.*	GENNAIO/NOVEMBRE *JANUARY/NOVEMBER*				VAR. % *% CHG.*
MARCA/MAKE	2021	*%*	2020	*%*	*21/20*	2021	*%*	2020	*%*	*21/20*
STELLANTIS Group*	***36.482***	***34,9***	***54.716***	***39,5***	***-33,3***	***519.525***	***37,9***	***488.343***	***38,7***	***+6,4***
FIAT	15.251	14,6	21.385	15,4	-28,7	210.053	15,3	191.798	15,2	+9,5
PEUGEOT	4.657	4,5	7.903	5,7	-41,1	78.838	5,7	73.702	5,8	+7,0
CITROEN	4.383	4,2	6.849	4,9	-36,0	61.962	4,5	59.119	4,7	+4,8
JEEP	4.182	4,0	7.028	5,1	-40,5	59.747	4,4	54.141	4,3	+10,4
OPEL	3.356	3,2	4.814	3,5	-30,3	51.347	3,7	50.287	4,0	+2,1
LANCIA	3.207	3,1	4.217	3,0	-24,0	41.469	3,0	38.296	3,0	+8,3
ALFA ROMEO	954	0,9	1.985	1,4	-51,9	10.326	0,8	15.538	1,2	-33,5
DS	371	0,4	355	0,3	+4,5	4.283	0,3	4.242	0,3	+1,0
MASERATI	121	0,1	180	0,1	-32,8	1.500	0,1	1.220	0,1	+23,0
VW Group	***15.521***	***14,9***	***22.275***	***16,1***	***-30,3***	***220.559***	***16,1***	***209.797***	***16,6***	***+5,1***
VOLKSWAGEN	8.723	8,3	11.895	8,6	-26,7	118.532	8,6	115.557	9,2	+2,6
AUDI	3.290	3,1	5.437	3,9	-39,5	52.721	3,8	46.064	3,6	+14,5
SKODA	1.348	1,3	2.284	1,6	-41,0	23.634	1,7	22.917	1,8	+3,1
SEAT	1.476	1,4	2.144	1,5	-31,2	20.006	1,5	19.731	1,6	+1,4
PORSCHE	669	0,6	498	0,4	+34,3	5.378	0,4	5.267	0,4	+2,1
LAMBORGHINI	15	0,0	17	0,0	-11,8	288	0,0	261	0,0	+10,3
RENAULT Group	***12.180***	***11,7***	***15.500***	***11,2***	***-21,4***	***126.833***	***9,3***	***127.088***	***10,1***	***-0,2***
RENAULT	5.842	5,6	9.311	6,7	-37,3	69.794	5,1	77.243	6,1	-9,6
DACIA	6.338	6,1	6.189	4,5	+2,4	57.039	4,2	49.845	3,9	+14,4
TOYOTA Group	***6.887***	***6,6***	***8.082***	***5,8***	***-14,8***	***83.176***	***6,1***	***66.808***	***5,3***	***+24,5***
TOYOTA	6.437	6,2	7.723	5,6	-16,7	78.812	5,7	63.117	5,0	+24,9
LEXUS	450	0,4	359	0,3	+25,3	4.364	0,3	3.691	0,3	+18,2
FORD	***4.832***	***4,6***	***8.322***	***6,0***	***-41,9***	***77.271***	***5,6***	***82.807***	***6,6***	***-6,7***
HYUNDAI Group	***7.714***	***7,4***	***5.474***	***3,9***	***+40,9***	***84.433***	***6,2***	***65.228***	***5,2***	***+29,4***
HYUNDAI	3.842	3,7	2.666	1,9	+44,1	42.625	3,1	31.689	2,5	+34,5
KIA	3.872	3,7	2.808	2,0	+37,9	41.808	3,0	33.539	2,7	+24,7
BMW Group	***5.162***	***4,9***	***6.949***	***5,0***	***-25,7***	***64.624***	***4,7***	***57.881***	***4,6***	***+11,6***
BMW	3.519	3,4	4.893	3,5	-28,1	48.138	3,5	42.488	3,4	+13,3
MINI	1.643	1,6	2.056	1,5	-20,1	16.486	1,2	15.393	1,2	+7,1
DAIMLER Group	***3.856***	***3,7***	***4.985***	***3,6***	***-22,6***	***50.971***	***3,7***	***46.821***	***3,7***	***+8,9***
MERCEDES	3.232	3,1	4.257	3,1	-24,1	44.569	3,3	42.774	3,4	+4,2
SMART	624	0,6	728	0,5	-14,3	6.402	0,5	4.047	0,3	+58,2
SUZUKI	***2.497***	***2,4***	***3.688***	***2,7***	***-32,3***	***37.833***	***2,8***	***31.077***	***2,5***	***+21,7***
NISSAN	***2.350***	***2,2***	***2.975***	***2,1***	***-21,0***	***25.545***	***1,9***	***25.875***	***2,1***	***-1,3***
VOLVO	***1.420***	***1,4***	***1.517***	***1,1***	***-6,4***	***17.942***	***1,3***	***15.412***	***1,2***	***+16,4***
JAGUAR LAND ROVER Grou	***802***	***0,8***	***1.253***	***0,9***	***-36,0***	***15.146***	***1,1***	***13.950***	***1,1***	***+8,6***
LAND ROVER	583	0,6	871	0,6	-33,1	11.269	0,8	10.647	0,8	+5,8
JAGUAR	219	0,2	382	0,3	-42,7	3.877	0,3	3.303	0,3	+17,4
MAZDA	***873***	***0,8***	***893***	***0,6***	***-2,2***	***11.858***	***0,9***	***9.490***	***0,8***	***+25,0***
DR	***1.121***	***1,1***	***428***	***0,3***	***+161,9***	***7.533***	***0,5***	***3.137***	***0,2***	***+140,1***
HONDA	***538***	***0,5***	***587***	***0,4***	***-8,3***	***6.080***	***0,4***	***6.343***	***0,5***	***-4,1***
TESLA	***438***	***0,4***	***263***	***0,2***	***+66,5***	***5.411***	***0,4***	***2.881***	***0,2***	***+87,8***
MITSUBISHI	***213***	***0,2***	***217***	***0,2***	***-1,8***	***3.771***	***0,3***	***3.822***	***0,3***	***-1,3***
SUBARU	***222***	***0,2***	***207***	***0,1***	***+7,2***	***2.153***	***0,2***	***1.879***	***0,1***	***+14,6***
FERRARI	***43***	***0,0***	***41***	***0,0***	***+4,9***	***569***	***0,0***	***489***	***0,0***	***+16,4***
ALTRE	***1.327***	***1,3***	***240***	***0,2***	***+452,9***	***9.933***	***0,7***	***3.008***	***0,2***	***+230,2***
TOTALE MERCATO	104.478	100,0	138.612	100,0	-24,6	1.371.166	100,0	1.262.136	100,0	+8,6

Fonte: CED - Ministero delle Infrastrutture e della Mobilità sostenibili

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 30/11/2021

* 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*	NOVEMBRE 2021[1] *NOVEMBER 2021*
1	FIAT	PANDA	8.737
2	LANCIA	YPSILON	3.207
3	DACIA	SANDERO	2.969
4	DACIA	DUSTER	2.929
5	TOYOTA	YARIS CROSS	2.655
6	VOLKSWAGEN	T-ROC	2.421
7	CITROEN	C3	2.396
8	JEEP	COMPASS	2.108
9	FORD	ECOSPORT	2.010
10	JEEP	RENEGADE	2.004

N.	MARCA *Make*	MODELLO *Model*	GEN/NOV 2021 *JAN/NOV 2021*
1	FIAT	PANDA	104.354
2	FIAT	500[2]	45.138
3	LANCIA	YPSILON	41.470
4	JEEP	RENEGADE	32.465
5	TOYOTA	YARIS	30.982
6	FIAT	500X	29.734
7	CITROEN	C3	28.364
8	DACIA	SANDERO	27.846
9	FORD	PUMA	27.109
10	VOLKSWAGEN	T-ROC	27.052

Fonte: CED - Ministero delle Infrastrutture e della Mobilità sostenibili

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 30/11/2021

[1] Fiat 500 non comprende versione Elettrica e marchio Abarth, con le quali raggiungerebbe la terza posizione

[2] Comprende versione Elettrica e marchio Abarth

Associazione Nazionale Filiera Industria Automobilistica

Sede di Torino: 10128 - Corso Galileo Ferraris, 61 – Tel. +39 011 5546511 – Fax +39 011 545464
Dir. Studi e Ricerche: Tel. +39 0115546524 – E-mail: studi.ricerche@anfia.it – www.anfia.it
Sede di Roma: 00144 - Viale Pasteur, 10 – Tel. +39 06 54221493 (4) – Fax +39 06 54221418 – E-mail: anfia.roma@anfia.it