Press release

ITALIAN CAR MARKET IN THE RED ONCE AGAIN IN OCTOBER: -35.7%

A structured effort is needed to support the growth of the market for low-emission cars and light commercial vehicles, as already emphasised by the government at the last meeting of the Automotive Round Table at the Ministry for Economic Development, when it spoke about a three-year measure, especially given the agreements that Italy will sign at the end of the COP26 summit currently being held in Glasgow

Turin, 2nd November 2021 – According to data published today by the Ministry of Infrastructure and Sustainable Mobility, in October 2021, the Italian car market registered 101,015 vehicles (-35.7%) compared to 157,188 units in October 2020.

The numbers registered in the first ten months of 2021 totalled 1,266,629 units, 12.7% more than the numbers reported in the same period of January-October 2020, which was marked by a significant drop in sales due to the effects of the measures to contain the pandemic. Compared to 2019, the January-October 2021 period was down 22%.

"Once again in October, the car market closed with a significant double-digit decline (-35.7%), which follows the severe downturns already recorded in the previous three months - declared **Paolo Scudieri, President of ANFIA**. *The negative performance in the tenth month of the year, which saw one fewer working day (21 days compared to 22) than in October 2020, is still being affected by the crisis in raw materials, especially semiconductors, which is causing delays of many months in vehicle production and delivery times.*

Additionally, the refinancing of €100 million from the Automotive Fund to purchase low-emission vehicles, provided for in the Italian fiscal decree of 21st October, became operational only from the 27th of October, thus having a very marginal impact on the performance of registrations for the month. This is further confirmation of the fact that continuous start-stop incentives are not helpful for the market. Moreover, the ecobonus fund for cars in the 0-60 g/km CO_2 range is already close to being exhausted, although refinancing is undoubtedly beneficial.

In this scenario, it is essential that the 2022 Budget Law, also given the commitments that Italy will make at the end of the COP26 currently underway in Glasgow, includes a measure of at least three years' duration to support the market for low-emission cars and light commercial vehicles, as part of a plan to accompany the energy and production transition of our sector.

As ANFIA, we are working to present our proposals to meet the prospects already announced by the government at the last meeting of the 'Market' working group of the Automotive Round Table of the Ministry for Economic Development, discussing a three-year structural measure".

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. In October, the percentage of non-rechargeable hybrid cars exceeded that of petrol cars for the fourth consecutive month and was the highest in the market.

Diesel cars, down 63.5% in October, accounted for 17.3% and 22.7% for the first ten months of 2021 (34.1% for the same period in 2020). Since the beginning of the year, diesel cars have seen their market shrink the most: -25%. The demand for petrol cars is also down, with a 47% drop and 26.1% share in October, and -12.3% in the first ten months, with 30.4% share (9 percentage points less than January-October 2020).

On the other hand, registration of alternatively fuel cars accounted for 56.6% in October 2021 and 46.9% in the first ten months. This decline was down 3.9%, however up 97.1% in the year. Electrified cars accounted for 47.4% of the October market and 37.6% in the first ten months. Of these, non-rechargeable hybrids fell by 8.2% in October to 35.3% share while growing 122% year-on-year to 28.7% share. Rechargeable cars, up 85.7% in the tenth month of the year, had a 12% share in October and 8.9% share in the first ten months (plug-in hybrids 5% in October and 4.6% in the year-to-date period, and electric cars 7% in October and 4.3% in the year-to-date period). Lastly, gas-powered vehicles accounted for 9.2% of the market in the tenth month of 2021 and 9.3% in the first ten months. Among these, LPG cars had a market share of 7.8% and 7.1% in the year-to-date period, and CNG cars 1.4% in the month and 2.2% in the first ten months. Sales of LPG vehicles fell in the month (-31.4%) and grew in the first ten months (+19.5%), while sales of natural gas vehicles fell by 44.3% in October and increased by 8% over the year as a whole.

The excellent performance of the Fiat Panda, Lancia Ypsilon and Fiat 500 hybrids continued, occupying, respectively, first, second and third place in the mild/full hybrid segment for the month and since the start of 2021. Furthermore, among PHEVs, the Jeep Compass is the best-selling model, both in October and in the first ten months, while the Fiat 500 is by far the best-selling electric model since the start of 2021.

Looking at the **market by segment**, in October, small and super-utility cars accounted for 41.9%, down 35.9%, while in the first ten months of this year, their share was 39.5%, up 16%. The best-selling model is still the Fiat Panda, with Fiat 500 and Lancia Ypsilon

[1] Provisional Data

10128 Turin - Corso Galileo Ferraris, 61 – Phone: +39 011 5546511 - E-mail: anfia@anfia.it -
00144 Rome - Viale Pasteur, 10 – Phone: +39 06 54221493 (4) - E-mail: anfia.roma@anfia.it
www.anfia.it

occupying second and third positions. Cars in the medium segments have a market share of 9.7% in October (-50.3%) and 11.3% in the first ten months of 2021 (-4.3%), with Fiat Tipo in the first place since the start of the year.

In October, SUVs had a 44.8% market share, down 32.2%, and accounted for 46.1% of the cumulative market, up 17.2%. In detail, small SUVs accounted for 19.8% of the market for the month, down 37% from October 2020, while growing 18% cumulatively. Compact SUVs accounted for 17.9%, down 30.8% and up 17.2% over the first ten months of 2021 (led by the Jeep Compass). With a 5.7% share, Medium SUVs dropped 19.8% and increased 14.4% cumulatively, while sales of large SUVs accounted for 1.4% (down 14.2% for the month and up 14.8% for the first ten months of 2021). Stellantis Group cars accounted for 22.9% of SUV sales.

MPVs accounted for 1.4% in October and 1.7% in the first ten months and were down both in the month (48.1%) and aggregate (-19.6%).

According to the ISTAT survey, in October[2], the consumer confidence index (base 2010=100) is estimated to decrease from 119.6 to 118.4, while the **composite index of business confidence** (Iesi) is calculated to increase from 113.7 to 115.

Concerning consumer confidence and durable goods, including automobiles, the index relating to the current opportunity to purchase is down compared to September 2021 (from -21.3 to -16.1).

According to preliminary ISTAT estimates, in October, the **national consumer price index** increased by 0.6% monthly and 2.9% annually (from +2.5% in the previous month). The further acceleration in inflation was mainly due to prices of energy goods (from +20.2% in September to +22.9%), both regulated components (from +34.3% to +37%) and prices of unregulated component (from +13.3% to +15%).

In the latter sector, looking at the trend in fuel prices, the prices of **Diesel** accelerated (from +17.9% to +23.5%; +3.6% on a monthly basis), those of **Petrol** (from +18.4% to +22.1%; +2.9% compared to the previous month), and the prices of **Other** fuels (from +17% to +33%; +13.6% compared to September).

Overall, the **Stellantis Group** registered 35,790 vehicles (-41.7%) for the month, with a market share of 35.4%.

In cumulative terms, since the beginning of 2021, the Group's total registrations stood at 483,032 units (+11.4%), with a market share of 38.1%.

[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.

10128 Turin - Corso Galileo Ferraris, 61 – Phone: +39 011 5546511 - E-mail: anfia@anfia.it -
00144 Rome - Viale Pasteur, 10 – Phone: +39 06 54221493 (4) - E-mail: anfia.roma@anfia.it
www.anfia.it

There are six Stellantis Group models in the **October top ten**, with Fiat Panda still leading the list (11,005 units), followed in second place by Lancia Ypsilon (3,012) and in third place by Fiat 500 (2,250), which re-entered the list. In fourth place is Citroen C3 (2,248), up six places from the September top ten, followed in sixth by Jeep Renegade (1,820) and seventh by Jeep Compass (1,805). Finally, Peugeot 2008 (1,801) came in eighth.

Finally, the **used car market** totalled 297,892 transfers of ownership before mini transfers to dealers in October 2021, 16.8% less than in October 2020. In the first ten months of 2021, there were 2,887,375 transfers of ownership, up 18% on 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
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 are 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.

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 6.2% of the Italian GDP
76.3 billion Euros of tax levy of motorisation

Comunicato Stampa

ANFIA
Associazione Nazionale Filiera Industria Automobilistica

ITALIA - IMMATRICOLAZIONI AUTOVETTURE

ITALY - NEW CAR REGISTRATIONS

dati provvisori/*provisional data*

	OTTOBRE *OCTOBER*				VAR. % *% CHG.*	GENNAIO/OTTOBRE *JANUARY/OCTOBER*				VAR. % *% CHG.*
MARCA/*MAKE*	2021	%	2020	%	*21/20*	2021	%	2020	%	*21/20*
STELLANTIS Group*	***35.790***	***35,4***	***61.371***	***39,0***	***-41,7***	***483.032***	***38,1***	***433.627***	***38,6***	***+11,4***
FIAT	17.116	16,9	25.400	16,2	-32,6	194.797	15,4	170.413	15,2	+14,3
PEUGEOT	4.438	4,4	8.654	5,5	-48,7	74.179	5,9	65.799	5,9	+12,7
CITROEN	3.739	3,7	7.944	5,1	-52,9	57.581	4,5	52.270	4,7	+10,2
JEEP	3.705	3,7	6.271	4,0	-40,9	55.563	4,4	47.113	4,2	+17,9
OPEL	2.496	2,5	6.141	3,9	-59,4	47.990	3,8	45.473	4,0	+5,5
LANCIA	3.012	3,0	4.717	3,0	-36,1	38.261	3,0	34.079	3,0	+12,3
ALFA ROMEO	757	0,7	1.600	1,0	-52,7	9.370	0,7	13.553	1,2	-30,9
DS	401	0,4	493	0,3	-18,7	3.912	0,3	3.887	0,3	+0,6
MASERATI	126	0,1	151	0,1	-16,6	1.379	0,1	1.040	0,1	+32,6
VW Group	***13.086***	***13,0***	***24.109***	***15,3***	***-45,7***	***205.033***	***16,2***	***187.522***	***16,7***	***+9,3***
VOLKSWAGEN	7.641	7,6	12.752	8,1	-40,1	109.804	8,7	103.662	9,2	+5,9
AUDI	2.986	3,0	5.619	3,6	-46,9	49.431	3,9	40.627	3,6	+21,7
SKODA	868	0,9	2.738	1,7	-68,3	22.286	1,8	20.633	1,8	+8,0
SEAT	975	1,0	2.344	1,5	-58,4	18.530	1,5	17.587	1,6	+5,4
PORSCHE	595	0,6	632	0,4	-5,9	4.709	0,4	4.769	0,4	-1,3
LAMBORGHINI	21	0,0	24	0,0	-12,5	273	0,0	244	0,0	+11,9
RENAULT Group	***10.924***	***10,8***	***14.700***	***9,4***	***-25,7***	***114.647***	***9,1***	***111.588***	***9,9***	***+2,7***
RENAULT	5.736	5,7	9.137	5,8	-37,2	63.949	5,0	67.932	6,0	-5,9
DACIA	5.188	5,1	5.563	3,5	-6,7	50.698	4,0	43.656	3,9	+16,1
TOYOTA Group	***6.194***	***6,1***	***8.753***	***5,6***	***-29,2***	***76.285***	***6,0***	***58.726***	***5,2***	***+29,9***
TOYOTA	5.793	5,7	8.312	5,3	-30,3	72.371	5,7	55.394	4,9	+30,6
LEXUS	401	0,4	441	0,3	-9,1	3.914	0,3	3.332	0,3	+17,5
FORD	***4.500***	***4,5***	***10.297***	***6,6***	***-56,3***	***72.436***	***5,7***	***74.485***	***6,6***	***-2,8***
HYUNDAI Group	***8.371***	***8,3***	***8.340***	***5,3***	***+0,4***	***76.712***	***6,1***	***59.754***	***5,3***	***+28,4***
HYUNDAI	4.362	4,3	4.069	2,6	+7,2	38.781	3,1	29.023	2,6	+33,6
KIA	4.009	4,0	4.271	2,7	-6,1	37.931	3,0	30.731	2,7	+23,4
BMW Group	***5.118***	***5,1***	***7.176***	***4,6***	***-28,7***	***59.460***	***4,7***	***50.932***	***4,5***	***+16,7***
BMW	3.838	3,8	5.293	3,4	-27,5	44.617	3,5	37.595	3,3	+18,7
MINI	1.280	1,3	1.883	1,2	-32,0	14.843	1,2	13.337	1,2	+11,3
DAIMLER Group	***4.346***	***4,3***	***6.415***	***4,1***	***-32,3***	***47.108***	***3,7***	***41.836***	***3,7***	***+12,6***
MERCEDES	3.664	3,6	5.733	3,6	-36,1	41.330	3,3	38.517	3,4	+7,3
SMART	682	0,7	682	0,4	+0,0	5.778	0,5	3.319	0,3	+74,1
SUZUKI	***3.393***	***3,4***	***4.951***	***3,1***	***-31,5***	***35.335***	***2,8***	***27.389***	***2,4***	***+29,0***
NISSAN	***2.132***	***2,1***	***3.472***	***2,2***	***-38,6***	***23.191***	***1,8***	***22.900***	***2,0***	***+1,3***
VOLVO	***1.398***	***1,4***	***1.897***	***1,2***	***-26,3***	***16.521***	***1,3***	***13.895***	***1,2***	***+18,9***
JAGUAR LAND ROVER Grou	***1.053***	***1,0***	***1.738***	***1,1***	***-39,4***	***14.343***	***1,1***	***12.697***	***1,1***	***+13,0***
LAND ROVER	863	0,9	1.379	0,9	-37,4	10.684	0,8	9.776	0,9	+9,3
JAGUAR	190	0,2	359	0,2	-47,1	3.659	0,3	2.921	0,3	+25,3
MAZDA	***1.217***	***1,2***	***1.308***	***0,8***	***-7,0***	***10.985***	***0,9***	***8.597***	***0,8***	***+27,8***
DR	***907***	***0,9***	***527***	***0,3***	***+72,1***	***6.411***	***0,5***	***2.709***	***0,2***	***+136,7***
HONDA	***704***	***0,7***	***1.003***	***0,6***	***-29,8***	***5.542***	***0,4***	***5.756***	***0,5***	***-3,7***
TESLA	***89***	***0,1***	***64***	***0,0***	***+39,1***	***4.971***	***0,4***	***2.618***	***0,2***	***+89,9***
MITSUBISHI	***329***	***0,3***	***400***	***0,3***	***-17,8***	***3.558***	***0,3***	***3.605***	***0,3***	***-1,3***
SUBARU	***223***	***0,2***	***280***	***0,2***	***-20,4***	***1.931***	***0,2***	***1.672***	***0,1***	***+15,5***
FERRARI	***55***	***0,1***	***44***	***0,0***	***+25,0***	***525***	***0,0***	***448***	***0,0***	***+17,2***
ALTRE	***1.186***	***1,2***	***343***	***0,2***	***+245,8***	***8.603***	***0,7***	***2.767***	***0,2***	***+210,9***
TOTALE MERCATO	**101.015**	**100,0**	**157.188**	**100,0**	**-35,7**	**1.266.629**	**100,0**	**1.123.523**	**100,0**	**+12,7**

Fonte: CED - Ministero delle Infrastrutture e della Mobilità sostenibili

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/10/2021

* 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*	OTTOBRE 2021[1] *OCTOBER 2021*
1	FIAT	PANDA	11.005
2	LANCIA	YPSILON	3.012
3	FIAT	500	2.250
4	CITROEN	C3	2.248
5	DACIA	SANDERO	1.870
6	JEEP	RENEGADE	1.820
7	JEEP	COMPASS	1.805
8	PEUGEOT	2008	1.801
9	VOLKSWAGEN	T-CROSS	1.798
10	VOLKSWAGEN	T-ROC	1.790

N.	MARCA *Make*	MODELLO *Model*	GEN/OTT 2021 *JAN/OCT 2021*
1	FIAT	PANDA	95.610
2	FIAT	500[2]	42.005
3	LANCIA	YPSILON	38.262
4	TOYOTA	YARIS	30.526
5	JEEP	RENEGADE	30.458
6	FIAT	500X	28.733
7	FORD	PUMA	26.065
8	CITROEN	C3	25.938
9	DACIA	SANDERO	24.863
10	VOLKSWAGEN	T-ROC	24.631

Fonte: CED - Ministero delle Infrastrutture e della Mobilità sostenibili

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/10/2021

[1] Fiat 500 non comprende versione Elettrica e marchio Abarth

[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