Press release

SEPTEMBER WORSE THAN EXPECTED FOR ITALY'S CAR INDUSTRY: -32.7%

The downward trend of July and August continued due to the continuing microchip crisis and the discontinuity concerning the ecobonus. It is essential, for the future, to define a programme of measures to support demand in line with an overall strategic plan to accompany the sector in its ecological transition over several years. In the meantime, ANFIA has revised its forecasts for the end of the year downwards to approximately 1,500,000 registrations: +8.5% compared to 2020 and -21.8% compared to 2019

Turin, 1st October 2021 – According to data published today by the Ministry of Infrastructure and Sustainable Mobility, in September 2021 the Italian car market registered 105,175 new vehicles (-32.7%) compared to 156,357 units in September 2020.

The volumes registered in the first nine months of 2021 thus amounted to 1,165,491 units, 20.6% more than the volumes for January-September 2020.

"The September car market ended worse than expected (-32.7%), carrying on and accentuating the downward trend of July (-19.2%) and August (-27.3%), a quarter undoubtedly influenced by the continuing crisis in semiconductors, responsible for slowdowns and production stoppages and delays in the delivery of new cars - commented **Paolo Scudieri, President of ANFIA**. *This is why we have requested and obtained an amendment to the infrastructure and Sustainable Mobility Decree approved at the beginning of September, an extension of the timeframe within which sellers are required to confirm the sale of vehicles with ecobonus incentives.*

About the ecobonus, the rapid depletion of resources just a few days after the refinancing at the beginning of September demonstrates the 'wait and see' effect of the new incentives, and their 'hiccup' disbursement is detrimental to both demand and the sales network.

We hope that, in the future, demand support measures will be planned in line with an overall strategic plan to accompany the sector in the ecological transition and over several years to ensure greater continuity for the market.

In the meantime, based on current results, ANFIA has revised downwards its forecasts for the end of the year to approximately 1,500,000 registrations, 8.5% more than in 2020 and 21.8% less than in 2019".

Looking at registrations by **fuel type** in detail[1], diesel and petrol cars continue to shrink, and hybrids and electric vehicles are gradually replacing their share of the market. In September, the percentage of non-rechargeable hybrid cars exceeded that of petrol cars for the third consecutive month and was the highest share of the market.

Diesel cars, down 61% in September, accounted for 18.8% of the market share for the month and 23% for the first nine months of 2021 (it was 34.6% for the same period in 2020). Since the beginning of the year, diesel cars have seen the most significant drop in the market (-19.5%). The petrol car market is also down, with -48.6% and 25.2% share in September and -7.8% in the first nine months, with 30.8% share (10 percentage points less than January-September 2020).

On the other hand, registration of alternatively fuelled cars accounted for 56% in September 2021 and 46.1% in the first nine months, up 8.2% and 121.9% year to date. Electrified vehicles accounted for 44.5% of the September market and 36.8% in the first nine months. Among these, non-rechargeable hybrids were up 2.7% in September to 31% share (for the eighth consecutive month, a higher percentage than diesel and for the third time also higher than petrol cars), while they grew 162% year-on-year to 28.2% share. Rechargeable vehicles, up 99.2% in September, had a 13.2% share and 8.6% for the first nine months (plug-in hybrids 5.2% and 4.6% for the year to date, and electric vehicles 8.1% for the month and 4% for the year to date). Finally, gas-powered cars accounted for 11.5% of the market in September 2021 and 9.3% in the first nine months, with LPG cars accounting for 9.4% and 7% in the year to date, and CNG cars for 2.1% in the month and 2.3% in the first nine months. Sales of LPG vehicles declined in the month (-16.8%) and have increased since the beginning of the year (+28.6%), while sales of CNG vehicles decreased by 38.1% in September and increased by 13.7% in the first nine months.

The excellent performance of Fiat Panda, Lancia Ypsilon and Fiat 500 hybrids continued, taking first, second and fourth place respectively in the mild/full hybrid segment. Among PHEVs, Jeep Compass and Jeep Renegade took the top two sales positions in September and the first nine months, while Fiat 500 is by far the best-selling electric model since the start of the year 2021.

Looking at the **market by segment**, small and super-utility cars accounted for 39% of the market in September, down 36.5%, while their share was 39.3% (+25.3%) in the first nine months of this year. 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 11.3% in September (-41%) and 11.4% in the first nine months of 2021 (+2.4%), with Fiat Tipo in the first place since the start of the year.

[1] Provisional data

In September, SUVs had a 46.1% market share, down 27.4%, and accounted for 46.2% of the cumulative market, up 24.7%. In detail, small SUVs accounted for 20.8% of the need for the month and were down 30.9% compared to September 2020 while growing 26.4% cumulatively. Jeep Renegade takes top position in the segment, both in the month and since the beginning of the year. Compact SUVs account for 18.2%, down 28% and up 24.6% for the first nine months of 2021 (led by the Jeep Compass). With a 5.6% share, Medium SUVs declined 15.3% for the month and increased 18.8% cumulatively, while large SUV sales accounted for 1.5% of the total (-1.8% for the month and +18.2% for the first nine months of 2021). Stellantis Group cars accounted for 24.4% of SUV sales.

MPVs accounted for 1.3% of the September market and 1.7% for the first nine months and were down month-on-month (49.4%) and cumulative (-16.5%).

According to the Italian National Institute of Statistics (ISTAT) survey, in September, the **index for consumer confidence** (base 2010=100) is estimated to have increased from 116.2 to 119.6, while the **composite index for business confidence** (Iesi) is estimated to have decreased slightly from 114.0 to 113.8.

In addition, concerning consumer confidence, for durable goods, including cars, the index of current purchasing opportunities is estimated to increase slightly compared to August 2021 (from -16.3 to -16.1).

According to preliminary ISTAT estimates, in September, the **national consumer price index** recorded a 0.1% decrease and a 2.6% increase on an annual basis (from +2.0% in the previous month). Inflation continued to be supported by growth in the price of energy goods (+19.8% in August to +20.2%), both regulated components (from +34.4% to +34.3%), and prices of non-regulated components (from +12.8% to +13.3%).

Looking at the trend in fuel prices in the latter segment, **diesel prices** accelerated (from +17% to +17.9%; -0.1% on a monthly basis), as did **petrol prices** (from +17.6% to +18.4%; +0.3% compared to the previous month), and **other fuel prices** (from +15.3% to +17.0%; +1.4% compared to August).

Overall, the **Stellantis Group** registered 33,465 vehicles (-41.5%) in the month, with a market share of 31.8%.

In cumulative terms, since the beginning of 2021, the Group's total registrations amounted to 447,210 units (+20.1%), with a market share of 38.4%.

There are five Stellantis Group models in the **September top ten**, with Fiat Panda still leading the list (7,285 units), followed in second place by Lancia Ypsilon (2,944), which is up one place on the August list, and in fifth place, Jeep Renegade (2,483). In

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sixth place was Jeep Compass (2,373), which climbed one position, followed in tenth place by Citroen C3 (1,811).

Finally, the **used car market** totalled 300,654 transfers of ownership before mini transfers to dealers in September 2021, 17.1% less than in September 2020. In the first nine months of 2021, there were 2,589,483 transfers of ownership, up 24% 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 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.

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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 motorisation

Comunicato Stampa

ITALIA - IMMATRICOLAZIONI AUTOVETTURE
ITALY - NEW CAR REGISTRATIONS

dati provvisori/*provisional data*

	SETTEMBRE SEPTEMBER				VAR. % % CHG.	GENNAIO/SETTEMBRE JANUARY/SEPTEMBER				VAR. % % CHG.
MARCA/MAKE	2021	%	2020	%	21/20	2021	%	2020	%	21/20
STELLANTIS Group*	33.465	31,8	57.207	36,6	-41,5	447.210	38,4	372.256	38,5	+20,1
FIAT	13.169	12,5	23.187	14,8	-43,2	177.671	15,2	145.013	15,0	+22,5
PEUGEOT	4.112	3,9	8.214	5,3	-49,9	69.738	6,0	57.145	5,9	+22,0
CITROEN	3.499	3,3	6.314	4,0	-44,6	53.836	4,6	44.326	4,6	+21,5
JEEP	4.960	4,7	7.091	4,5	-30,1	51.851	4,4	40.842	4,2	+27,0
OPEL	3.284	3,1	4.970	3,2	-33,9	45.492	3,9	39.332	4,1	+15,7
LANCIA	2.944	2,8	4.689	3,0	-37,2	35.248	3,0	29.362	3,0	+20,0
ALFA ROMEO	939	0,9	2.074	1,3	-54,7	8.610	0,7	11.953	1,2	-28,0
DS	423	0,4	499	0,3	-15,2	3.511	0,3	3.394	0,4	+3,4
MASERATI	135	0,1	169	0,1	-20,1	1.253	0,1	889	0,1	+40,9
VW Group	15.311	14,6	22.820	14,6	-32,9	191.934	16,5	163.413	16,9	+17,5
VOLKSWAGEN	9.446	9,0	13.594	8,7	-30,5	102.157	8,8	90.910	9,4	+12,4
AUDI	3.096	2,9	4.009	2,6	-22,8	46.443	4,0	35.008	3,6	+32,7
SKODA	1.151	1,1	2.940	1,9	-60,9	21.414	1,8	17.895	1,9	+19,7
SEAT	1.352	1,3	1.972	1,3	-31,4	17.554	1,5	15.243	1,6	+15,2
PORSCHE	236	0,2	285	0,2	-17,2	4.114	0,4	4.137	0,4	-0,6
LAMBORGHINI	30	0,0	20	0,0	+50,0	252	0,0	220	0,0	+14,5
RENAULT Group	13.623	13,0	18.052	11,5	-24,5	103.712	8,9	96.888	10,0	+7,0
RENAULT	6.404	6,1	11.020	7,0	-41,9	58.208	5,0	58.795	6,1	-1,0
DACIA	7.219	6,9	7.032	4,5	+2,7	45.504	3,9	38.093	3,9	+19,5
TOYOTA Group	5.893	5,6	9.374	6,0	-37,1	70.072	6,0	49.973	5,2	+40,2
TOYOTA	5.555	5,3	8.985	5,7	-38,2	66.559	5,7	47.082	4,9	+41,4
LEXUS	338	0,3	389	0,2	-13,1	3.513	0,3	2.891	0,3	+21,5
FORD	5.856	5,6	10.666	6,8	-45,1	67.929	5,8	64.188	6,6	+5,8
HYUNDAI Group	8.937	8,5	8.498	5,4	+5,2	68.332	5,9	51.414	5,3	+32,9
HYUNDAI	4.169	4,0	4.065	2,6	+2,6	34.414	3,0	24.954	2,6	+37,9
KIA	4.768	4,5	4.433	2,8	+7,6	33.918	2,9	26.460	2,7	+28,2
BMW Group	4.285	4,1	6.835	4,4	-37,3	54.342	4,7	43.756	4,5	+24,2
BMW	3.461	3,3	4.827	3,1	-28,3	40.779	3,5	32.302	3,3	+26,2
MINI	824	0,8	2.008	1,3	-59,0	13.563	1,2	11.454	1,2	+18,4
DAIMLER Group	3.625	3,4	6.133	3,9	-40,9	42.750	3,7	35.421	3,7	+20,7
MERCEDES	3.080	2,9	5.579	3,6	-44,8	37.654	3,2	32.784	3,4	+14,9
SMART	545	0,5	554	0,4	-1,6	5.096	0,4	2.637	0,3	+93,2
SUZUKI	3.669	3,5	4.970	3,2	-26,2	31.938	2,7	22.438	2,3	+42,3
NISSAN	2.308	2,2	3.599	2,3	-35,9	21.057	1,8	19.428	2,0	+8,4
VOLVO	1.002	1,0	1.767	1,1	-43,3	15.122	1,3	11.998	1,2	+26,0
JAGUAR LAND ROVER Grou	1.490	1,4	1.385	0,9	+7,6	13.289	1,1	10.959	1,1	+21,3
LAND ROVER	1.175	1,1	1.021	0,7	+15,1	9.821	0,8	8.397	0,9	+17,0
JAGUAR	315	0,3	364	0,2	-13,5	3.468	0,3	2.562	0,3	+35,4
MAZDA	1.306	1,2	1.453	0,9	-10,1	9.768	0,8	7.289	0,8	+34,0
DR	788	0,7	489	0,3	+61,1	5.503	0,5	2.182	0,2	+152,2
TESLA	1.429	1,4	956	0,6	+49,5	4.882	0,4	2.554	0,3	+91,2
HONDA	656	0,6	1.003	0,6	-34,6	4.836	0,4	4.753	0,5	+1,7
MITSUBISHI	361	0,3	594	0,4	-39,2	3.229	0,3	3.205	0,3	+0,7
SUBARU	176	0,2	197	0,1	-10,7	1.707	0,1	1.392	0,1	+22,6
FERRARI	35	0,0	27	0,0	+29,6	470	0,0	404	0,0	+16,3
ALTRE	960	0,9	332	0,2	+189,2	7.409	0,6	2.424	0,3	+205,7
TOTALE MERCATO	105.175	100,0	156.357	100,0	-32,7	1.165.491	100,0	966.335	100,0	+20,6

Fonte: CED - Ministero delle Infrastrutture e della Mobilità sostenibili

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 30/09/2021

* 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*	SETTEMBRE 2021[1] *SEPTEMBER 2021*
1	FIAT	PANDA	7.285
2	LANCIA	YPSILON	2.944
3	DACIA	SANDERO	2.732
4	DACIA	DUSTER	2.543
5	JEEP	RENEGADE	2.483
6	JEEP	COMPASS	2.373
7	VOLKSWAGEN	T-CROSS	2.226
8	RENAULT	CLIO	2.143
9	DACIA	SPRING	1.876
10	CITROEN	C3	1.811

N.	MARCA *Make*	MODELLO *Model*	GEN/SET 2021 *JAN/SEP 2021*
1	FIAT	PANDA	84.604
2	FIAT	500[2]	38.427
3	LANCIA	YPSILON	35.249
4	TOYOTA	YARIS	29.519
5	JEEP	RENEGADE	28.627
6	FIAT	500X	28.057
7	FORD	PUMA	25.751
8	CITROEN	C3	23.729
9	DACIA	SANDERO	23.006
10	VOLKSWAGEN	T-ROC	22.846

Fonte: CED - Ministero delle Infrastrutture e della Mobilità sostenibili

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 30/09/2021

[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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