Press Release

Analysis of the Italian Car Market in December 2020

Turin, January 4th, 2021 – According to the data published today by the Minister of Infrastructures and Transport, in December the Italian car market reaches 119,454 registrations, the 15% less respect to the same month in 2019.

The final balance of 2020 counts 1,381.496 registrations, in slowdown of 27.9% respect to the volumes of 2019.

Analyzing **registrations by fueling** [1], in December keeps going on the slowdown of the traditional fuels supply, while is always positive the electrified cars market. During the month, diesel cars reduced of 38% and represent the 25% of the market, while in the 2020 overall, registrations are the 41% less respect to the ones registered in 2019, with a share of 33%, 7 percentage points less respect to the previous year. Petrol cars decrease of 42% during the month and of 39% in the whole year, representing the 33% of the December market and the 38% of the registered in 2020. Alternative powered cars registrations double also during December, +111%, reaching the 42% of share (it was the 17% in December 2019). Since the beginning of the year, alternative powered cars registrations register a growth of 35%, representing the 29% of the market, 13 percentage points more than 2019.

Both LPG and methane cars, strongly decrease both during the month and during 2020. In details, LPG cars slowdown of 24% during the month and of 31% in the cumulate; methane cars register, instead, a decrease of 12% in December and of 18% during the year.

Grow the segments of hybrids and of electrics cars, +271% during December and +122% during the year. Among these, mild and full hybrids cars grow during the month of 181%, with a market share of 21%, and of 102% during the whole year, with a market share of 16% (it was of 6% in 2019). Rechargeable cars sold in December 2020 are about 8 times the ones registered in December 2019, thanks to the strong positive variations both of the electrics (+758% and 6% of share), and of the plug-in hybrids (+849% and 6% of share). Together, the ECV represent the 12% of the market in the last month and the 4% since the beginning of the year. In the cumulate of 2020, the electrics and the rechargeable hybrids grow of 250% respect to 2019.

Keep to going on the good performance of Lancia Ypsilon, Fiat Panda and Fiat 500 in their hybrid versions, with over 60,000 cars registered during the year. Among PHEV, Jeep Compass and Jeep Renegade plug-in are still respectively at the second and at the

[1] Temporary Data

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fourth best sold model, with over 4,000 cars registered in the second semester, since their launch on the market.

Referring to the **market by segments**, in December slowdown the registrations of all segments with the only exception of the economy cars, +15% (at the second place Lancia Ypsilon) and of mediums, +10%. Super economy ones register a trend of decrease of 22% (Fiat Panda and Fiat 500 are still the best sold models and represent the 64% of the segment). Decrease also the volumes of the lower-medium cars (-17%) and of the higher ones (-37%). SUVs register a trend of decrease of 20% (the 19.5% of the SUVs registrations belong to FCA Group), with a market share of 40% in December. In details, small SUVs decrease of 3% (at the third place Fiat 500X while Jeep Renegade slides at the fourth place), Compacted SUV of 34% (Jeep Compass is still the best sold model during the month), Medium SUVs of 30% (at the first place Alfa Romeo Stelvio), and big SUVs of 28% (at the third place Maserati Levante). The variation is negative also for the monovolumes registrations, that reduce in December of 33%. In the end, slowdown of 42% sportive cars, while luxury ones lose the 37% respect to December 2019.

In the whole 2020, are in double digit slowdown all segments registrations.

According to ISTAT, in December 2020 is expected an increase both of the **consumer confidence index** (base 2010=100), which goes from 98.4 to 102.4, and of the **composite index of the company confidence climate (Iesi)**, which goes from 83.3 to 87.7.

Referring to the consumer confidence climate, regarding the purchase of the long lasting goods and among them there is the car, the balance regarding the current opportunity is growing (from -72.3 to -51.9).

According to preliminary ISTAT estimates, in November **the national consumer price index** registers a slowdown of 0.1% per month and of 0.2% per year (from -0,3% of October). The negative inflation, for the seventh month in row, is determined by the inflation of the energy prices (-8.6%, from -8.7% of the previous month).

National brands, in the overall, totalized during the month 31,875 registrations (+1.6%), with a market share of 26.7% (it was 22.3% in December 2019). From January to December 2020, the overall of the registrations reach 336,761 units (-26.6%), with a market share of 24.4%.

FCA brands (Maserati included) totalized in the overall 31,508 registrations during the month (+1.1%), with a market share of 26.4% (22.2% in December 2019). Positive trend for Fiat (+1%) and Lancia (+20.5%). Positive also for Ferrari (+30.8%) and Lamborghini (+12.5%).

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In the whole 2020, FCA brands totalize 332,478 cars registered, with a slowdown of 26.8%.

The Italian models in the **top ten of the best sold** are six, with Fiat Panda (8,978 units) which is still the best sold car during the month and in the whole 2020 followed at the third by Lancia Ypsilon (4,728) and at the fifth by Fiat 500 (3,155). At the sixth place there is Fiat 500X (2,943), followed at the seventh by Jeep Compass (2,725) and at the ninth by Jeep Renegade (2,619).

The **second-hand market** reached in December, 276,665 ownerships transfers, including the mini-transfer operations to car dealer, the 13.8% less respect to December 2019. In the whole 2020 are registered 3,018.301 units, with a contraction of 27.9% respect to January/December 2019.

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ANFIA – Italian Association of the Automotive Industry – is one of the leading Italian Trade Associations, members of CONFINDUSTRIA.
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.

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The Automotive Production Chain in Italy
5.529 companies
274.000 employees (direct and indirect), more than 7% of the employees in the Italian manufacturing sector
105.9 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*

	DICEMBRE *DECEMBER*				VAR. % *% CHG.*	GENNAIO/DICEMBRE *JANUARY/DECEMBER*				VAR. % *% CHG.*
MARCA/*MAKE*	2020	%	2019	%	20/19	2020	%	2019	%	20/19
FCA	31.508	26,38	31.182	22,20	1,05	332.478	24,07	454.189	23,69	-26,80
FIAT	19.519	16,34	19.329	13,76	0,98	211.297	15,29	285.945	14,92	-26,11
ALFA ROMEO	1.664	1,39	2.019	1,44	-17,58	17.202	1,25	25.879	1,35	-33,53
LANCIA	4.728	3,96	3.924	2,79	20,49	43.023	3,11	58.755	3,07	-26,78
JEEP	5.458	4,57	5.753	4,10	-5,13	59.598	4,31	81.526	4,25	-26,90
MASERATI	139	0,12	157	0,11	-11,46	1.358	0,10	2.084	0,11	-34,84
FERRARI	17	0,01	13	0,01	30,77	506	0,04	495	0,03	2,22
DR	341	0,29	156	0,11	118,59	3.476	0,25	3.793	0,20	-8,36
LAMBORGHINI	9	0,01	8	0,01	12,50	270	0,02	313	0,02	-13,74
ALTRE NAZIONALI	-	0,00	4	0,00	-	31	0,00	42	0,00	-26,19
TOT. MARCHE NAZ.	**31.875**	26,68	**31.363**	22,33	1,63	**336.761**	24,38	**458.832**	23,94	-26,60
AUDI	3.770	3,16	4.922	3,50	-23,41	49.833	3,61	64.462	3,36	-22,69
BMW	3.525	2,95	4.534	3,23	-22,25	46.011	3,33	58.139	3,03	-20,86
CITROEN/DS	5.636	4,72	5.739	4,09	-1,79	68.996	4,99	90.949	4,74	-24,14
DACIA	3.563	2,98	6.687	4,76	-46,72	53.407	3,87	84.104	4,39	-36,50
FORD	6.759	5,66	9.358	6,66	-27,77	89.558	6,48	122.567	6,39	-26,93
HONDA	362	0,30	591	0,42	-38,75	6.705	0,49	8.670	0,45	-22,66
HYUNDAI	1.699	1,42	4.100	2,92	-58,56	33.387	2,42	50.361	2,63	-33,70
JAGUAR	231	0,19	426	0,30	-45,77	3.534	0,26	8.065	0,42	-56,18
KIA	1.916	1,60	3.457	2,46	-44,58	35.454	2,57	47.762	2,49	-25,77
LAND ROVER	674	0,56	928	0,66	-27,37	11.319	0,82	16.425	0,86	-31,09
MAZDA	606	0,51	1.594	1,13	-61,98	10.096	0,73	13.405	0,70	-24,68
MERCEDES	3.142	2,63	6.271	4,46	-49,90	45.909	3,32	62.895	3,28	-27,01
MINI	1.193	1,00	1.332	0,95	-10,44	16.586	1,20	21.662	1,13	-23,43
MITSUBISHI	210	0,18	578	0,41	-63,67	4.032	0,29	7.902	0,41	-48,97
NISSAN	2.481	2,08	2.765	1,97	-10,27	28.353	2,05	43.133	2,25	-34,27
OPEL	3.597	3,01	3.309	2,36	8,70	53.880	3,90	96.570	5,04	-44,21
PEUGEOT	7.925	6,63	7.599	5,41	4,29	81.626	5,91	110.053	5,74	-25,83
PORSCHE	422	0,35	450	0,32	-6,22	5.688	0,41	6.727	0,35	-15,45
RENAULT	8.651	7,24	9.678	6,89	-10,61	85.893	6,22	113.954	5,94	-24,62
SEAT	2.408	2,02	1.982	1,41	21,49	22.138	1,60	26.828	1,40	-17,48
SKODA	1.742	1,46	1.794	1,28	-2,90	24.659	1,78	26.639	1,39	-7,43
SMART	527	0,44	7.551	5,38	-93,02	4.574	0,33	35.278	1,84	-87,03
SSANGYONG	79	0,07	117	0,08	-32,48	1.150	0,08	2.304	0,12	-50,09
SUBARU	220	0,18	405	0,29	-45,68	2.099	0,15	2.803	0,15	-25,12
SUZUKI	2.381	1,99	4.088	2,91	-41,76	33.455	2,42	38.282	2,00	-12,61
TESLA	923	0,77	367	0,26	151,50	3.804	0,28	2.453	0,13	55,08
TOYOTA	8.043	6,73	5.500	3,92	46,24	71.148	5,15	90.168	4,70	-21,09
LEXUS	353	0,30	695	0,49	-49,21	4.044	0,29	5.826	0,30	-30,59
VOLKSWAGEN	12.600	10,55	10.916	7,77	15,43	128.152	9,28	176.854	9,23	-27,54
VOLVO	1.643	1,38	1.214	0,86	35,34	17.053	1,23	20.897	1,09	-18,39
ALTRE	298	0,25	138	0,10	115,94	2.192	0,16	1.980	0,10	10,71
TOT.MARCHE EST.	**87.579**	73,32	**109.085**	77,67	-19,71	**1.044.735**	75,62	**1.458.117**	76,06	-28,35
TOT.MERCATO	**119.454**	100,00	**140.448**	100,00	-14,95	**1.381.496**	100,00	**1.916.949**	100,00	-27,93

Elaborazioni ANFIA su dati del Ministero dei Trasporti/*Prepared by Anfia from the data of Ministry of Transportations (Aut. Min. D07161/H4)*

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/12/2020

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ITALIA - IMMATRICOLAZIONI AUTOVETTURE - Top ten

ITALY - NEW CAR REGISTRATIONS - Top ten

dati provvisori/*provisional data*

TOP 10

N.	**MARCA** *Make*	**MODELLO** *Model*	**DICEMBRE 2020** *DECEMBER 2020*
1	FIAT	PANDA	8.978
2	TOYOTA	YARIS	4.885
3	LANCIA	YPSILON	4.728
4	VOLKSWAGEN	T-ROC	3.291
5	FIAT	500[1]	3.155
6	FIAT	500X	2.943
7	JEEP	COMPASS	2.725
8	DACIA	SANDERO	2.625
9	JEEP	RENEGADE	2.619
10	PEUGEOT	208	2.576

N.	**MARCA** *Make*	**MODELLO** *Model*	**GEN/DIC 2020** *JAN/DEC 2020*
1	FIAT	PANDA	109.841
2	LANCIA	YPSILON	43.025
3	FIAT	500[2]	34.329
4	FIAT	500X	31.603
5	RENAULT	CLIO	31.165
6	JEEP	RENEGADE	30.564
7	TOYOTA	YARIS	29.530
8	RENAULT	CAPTUR	28.934
9	CITROEN	C3	28.063
10	DACIA	SANDERO	27.510

Fonte: CED - Ministero dei Trasporti

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/12/2020

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

[2] Comprende versione Elettrica e marchio Abarth

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