Press note

Analysis of the structure of the Italian car market in May 2021

Turin, 1st June 2021 – According to data published today by the Ministry of Infrastructure and Sustainable Mobility, in May 2021 the Italian car market totalled 142,730 registrations (+43%), compared to 99,842 units recorded in May 2020, which closed at -49.6%. If we compare the market with May 2019, the number of new cars fell by 27.9%.

The volumes registered in the first five months of 2021 totalled 735,125 units, 62.8% more than the volumes for January-May 2020 (-19.3% compared to January-May 2019).

Looking at the **market by fuel type**[1], the decline of diesel and petrol cars continues, with their share of the market gradually shrinking in favour of hybrids and electric vehicles.

Diesel cars, the only category to decline in May, failed to exceed the 25% share threshold for the fourth consecutive month, accounting for 23.1% of the May market and 24.2% of the market in the first five months of 2021. On the other hand, the share of petrol-powered vehicles fell slightly compared to April: 31.2% and 32.7% in the first five months.

Registrations of alternative fuels, on the other hand, reached 45.7% in May 2021 and 43.2% in the first five months. Electrified cars accounted for more than a third of the market (37% for the month and 34.8% overall). Of these, non-rechargeable hybrids accounted for 28.1% of the market in May (a higher share than diesel for the fourth consecutive month) and 27.4% overall. On the other hand, rechargeable hybrids accounted for 9% of the May market share (plug-in hybrids 5.4% for the month and 4.2% for the year-to-date, and pure electrics 3.6% for the month 3.2% for the year-to-date). Lastly, gas-powered vehicles accounted for 8.6% of the market in the fifth month of 2021 and 8.3% in the first five months of the year: LPG vehicles had a market share of 6.4% in the month and 6% in the year-to-date period, and CNG vehicles 2.2% in the month and 2.3% in the first five months of the year.

The excellent performance of Fiat Panda, Fiat 500 and Lancia Ypsilon hybrids, which occupy the top three places in the mild/full hybrid segment, continued. Jeep Compass topped the sales charts among PHEVs, while Fiat 500 was the best-selling electric vehicle, both in the month and year-to-date.

In terms of **market share by segment**, small and super-utility cars accounted for 37.8% of the market in May, while in the first five months of this year, their share was

[1] Provisional Data

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39.8%. The three best-selling models are Fiat Panda, Fiat 500 (both super-utility cars) and Lancia Ypsilon (small car). Cars in the medium segments have a market share of 11.2% in May and 10.6% in the first five months of 2021, with Fiat Tipo in first place since the start of the year.

SUVs had a market share of 43.2% in May and 43.4% for the year-to-date. In detail, small SUVs accounted for 19.7% of the month's market (Fiat 500X the best-selling model, with Jeep Renegade in fourth place and Peugeot 2008 in fifth), compact SUVs 17.7% (Jeep Compass in first place and Peugeot 3008 in third place), medium SUVs 4.6%, while sales of large SUVs accounted for 1.1% of the total. Stellantis Group cars account for 28.5% of SUV sales.

MPVs accounted for 3.9% in both the May and the first five months of 2021 markets. Finally, sports, premium, and luxury cars have a 1% share, both monthly and cumulatively.

According to the ISTAT survey, in May [2] the **consumer confidence index** (base 2010=100) is estimated to have increased markedly from 102.3 to 110.6 and the **composite business confidence index** (Iesi) from 97.9 to 106.3.

In addition, with regard to consumer confidence in durable goods, including cars, the index of current purchasing opportunities increased significantly compared to April 2021 (from -43.7 to -23.4).

According to the latest available ISTAT data, in May, the **national consumer price index** recorded a zero change monthly and an increase of 1.3% annually (from +1.1% in the previous month). The acceleration of inflation is mainly due to prices of energy goods, whose growth goes from +9.8% in April to +13.8% due to prices of unregulated component (which accelerate from +6.6% to +12.6%), while those of the regulated component continues to record a substantial increase, but stable (+16.8% as in April).

In the sector of unregulated energy goods, looking at the trend in fuel prices, **petrol** prices increased (from +9.6% in April to +16.1% in May; +1% compared to the previous month), **diesel** prices (from +8.3% to +15.1%; +0.8% on a monthly basis), and the prices of **other fuels** (from +7.3% to +9.2%; -0.2% compared to April).

The **Stellantis Group** as a whole registered 56,296 vehicles (+49.5%) in the month, with a market share of 39.4%.

[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.

Italian Association of Automotive Industry (ANFIA)

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In cumulative terms, since the beginning of 2021, the Group's total registrations amounted to 295,346 units (+60.8%), with a market share of 40.2%.

There are six Stellantis Group models in the **May top ten**, with Fiat Panda still leading the list (9,725 units), followed in second place by Lancia Ypsilon (4,611) and in third place by Fiat 500 (4,413). In fourth place was the Fiat 500X (4,316), followed in sixth place by the Jeep Compass (3,168) and in ninth place the Citroen C3 (2,992).

The **used car market** totalled 292,258 transfers of ownership before mini-transfers to dealers in May 2021, 41.2% more than in May 2020. In the first five months of 2021, there were 1,467,810 transfers of ownership, up 40% 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*

MARCA/MAKE	MAGGIO *MAY* 2021	%	2020	%	VAR. % *% CHG.* *21/20*	GENNAIO/MAGGIO *JANUARY/MAY* 2021	%	2020	%	VAR. % *% CHG.* *21/20*
STELLANTIS Group*	***56.296***	***39,4***	***37.657***	***37,7***	***+49,5***	***295.346***	***40,2***	***183.729***	***40,7***	***+60,8***
FIAT	23.798	16,7	13.981	14,0	+70,2	116.500	15,8	71.435	15,8	+63,1
PEUGEOT	8.093	5,7	6.263	6,3	+29,2	48.470	6,6	28.932	6,4	+67,5
CITROEN	6.594	4,6	4.776	4,8	+38,1	37.918	5,2	22.968	5,1	+65,1
OPEL	5.475	3,8	3.995	4,0	+37,0	31.016	4,2	19.933	4,4	+55,6
JEEP	6.020	4,2	4.611	4,6	+30,6	30.883	4,2	17.728	3,9	+74,2
LANCIA	4.611	3,2	2.438	2,4	+89,1	22.770	3,1	15.262	3,4	+49,2
ALFA ROMEO	1.113	0,8	1.173	1,2	-5,1	5.132	0,7	5.295	1,2	-3,1
DS	444	0,3	332	0,3	+33,7	1.934	0,3	1.768	0,4	+9,4
MASERATI	148	0,1	88	0,1	+68,2	723	0,1	408	0,1	+77,2
VW Group	***24.778***	***17,4***	***16.848***	***16,9***	***+47,1***	***119.808***	***16,3***	***75.812***	***16,8***	***+58,0***
VOLKSWAGEN	13.127	9,2	8.925	8,9	+47,1	62.695	8,5	42.630	9,4	+47,1
AUDI	6.171	4,3	3.845	3,9	+60,5	29.363	4,0	15.992	3,5	+83,6
SKODA	2.851	2,0	1.911	1,9	+49,2	14.063	1,9	8.124	1,8	+73,1
SEAT	2.070	1,5	1.602	1,6	+29,2	10.733	1,5	6.923	1,5	+55,0
PORSCHE	522	0,4	549	0,5	-4,9	2.805	0,4	2.037	0,5	+37,7
LAMBORGHINI	37	0,0	16	0,0	+131,3	149	0,0	106	0,0	+40,6
RENAULT Group	***10.235***	***7,2***	***10.770***	***10,8***	***-5,0***	***57.474***	***7,8***	***41.467***	***9,2***	***+38,6***
RENAULT	5.680	4,0	6.232	6,2	-8,9	33.324	4,5	25.707	5,7	+29,6
DACIA	4.555	3,2	4.538	4,5	+0,4	24.150	3,3	15.760	3,5	+53,2
FORD	***7.695***	***5,4***	***6.878***	***6,9***	***+11,9***	***46.036***	***6,3***	***28.780***	***6,4***	***+60,0***
TOYOTA Group	***8.989***	***6,3***	***4.671***	***4,7***	***+92,4***	***44.255***	***6,0***	***21.673***	***4,8***	***+104,2***
TOYOTA	8.618	6,0	4.334	4,3	+98,8	42.069	5,7	20.314	4,5	+107,1
LEXUS	371	0,3	337	0,3	+10,1	2.186	0,3	1.359	0,3	+60,9
HYUNDAI Group	***7.722***	***5,4***	***4.810***	***4,8***	***+60,5***	***37.642***	***5,1***	***23.552***	***5,2***	***+59,8***
HYUNDAI	3.922	2,7	2.359	2,4	+66,3	18.988	2,6	10.430	2,3	+82,1
KIA	3.800	2,7	2.451	2,5	+55,0	18.654	2,5	13.122	2,9	+42,2
BMW Group	***6.794***	***4,8***	***4.980***	***5,0***	***+36,4***	***34.975***	***4,8***	***20.051***	***4,4***	***+74,4***
BMW	4.986	3,5	3.812	3,8	+30,8	26.104	3,6	15.130	3,4	+72,5
MINI	1.808	1,3	1.168	1,2	+54,8	8.871	1,2	4.921	1,1	+80,3
DAIMLER Group	***5.716***	***4,0***	***3.930***	***3,9***	***+45,4***	***27.599***	***3,8***	***15.356***	***3,4***	***+79,7***
MERCEDES	5.016	3,5	3.568	3,6	+40,6	24.352	3,3	14.194	3,1	+71,6
SMART	700	0,5	362	0,4	+93,4	3.247	0,4	1.162	0,3	+179,4
SUZUKI	***3.631***	***2,5***	***2.866***	***2,9***	***+26,7***	***20.093***	***2,7***	***10.163***	***2,3***	***+97,7***
NISSAN	***2.314***	***1,6***	***1.646***	***1,6***	***+40,6***	***13.085***	***1,8***	***9.394***	***2,1***	***+39,3***
VOLVO	***2.231***	***1,6***	***1.540***	***1,5***	***+44,9***	***9.468***	***1,3***	***5.091***	***1,1***	***+86,0***
JAGUAR LAND ROVER Grou	***1.715***	***1,2***	***1.201***	***1,2***	***+42,8***	***8.580***	***1,2***	***5.940***	***1,3***	***+44,4***
LAND ROVER	1.230	0,9	985	1,0	+24,9	6.379	0,9	4.514	1,0	+41,3
JAGUAR	485	0,3	216	0,2	+124,5	2.201	0,3	1.426	0,3	+54,3
MAZDA	***996***	***0,7***	***713***	***0,7***	***+39,7***	***5.759***	***0,8***	***3.136***	***0,7***	***+83,6***
HONDA	***605***	***0,4***	***389***	***0,4***	***+55,5***	***2.882***	***0,4***	***2.051***	***0,5***	***+40,5***
DR	***699***	***0,5***	***186***	***0,2***	***+275,8***	***2.875***	***0,4***	***794***	***0,2***	***+262,1***
TESLA	***426***	***0,3***	***80***	***0,1***	***+432,5***	***2.152***	***0,3***	***966***	***0,2***	***+122,8***
MITSUBISHI	***499***	***0,3***	***238***	***0,2***	***+109,7***	***1.986***	***0,3***	***1.611***	***0,4***	***+23,3***
SUBARU	***217***	***0,2***	***173***	***0,2***	***+25,4***	***1.041***	***0,1***	***690***	***0,2***	***+50,9***
FERRARI	***40***	***0,0***	***62***	***0,1***	***-35,5***	***276***	***0,0***	***198***	***0,0***	***+39,4***
ALTRE	***1.132***	***0,8***	***204***	***0,2***	***+454,9***	***3.793***	***0,5***	***1.091***	***0,2***	***+247,7***
TOTALE MERCATO	142.730	100,0	99.842	100,0	+43,0	735.125	100,0	451.545	100,0	+62,8

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/05/2021

* 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*	MAGGIO 2021[1] *MAY 2021*
1	FIAT	PANDA	9.725
2	LANCIA	YPSILON	4.611
3	FIAT	500	4.413
4	FIAT	500X	4.316
5	FORD	PUMA	3.508
6	JEEP	COMPASS	3.168
7	VOLKSWAGEN	T-ROC	3.107
8	TOYOTA	YARIS	3.047
9	CITROEN	C3	2.992
10	DACIA	SANDERO	2.724

N.	MARCA *Make*	MODELLO *Model*	GEN/MAG 2021 *JAN/MAY 2021*
1	FIAT	PANDA	56.258
2	FIAT	500[2]	24.403
3	LANCIA	YPSILON	22.771
4	TOYOTA	YARIS	19.788
5	FIAT	500X	19.372
6	JEEP	RENEGADE	18.964
7	CITROEN	C3	17.295
8	FORD	PUMA	17.210
9	OPEL	CORSA	14.831
10	VOLKSWAGEN	T-ROC	14.728

Fonte: CED - Ministero delle Infrastrutture e della Mobilità sostenibili

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/05/2021

[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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