

## Press Release

**AGAIN A STRONG DECREASE IN NOVEMBER, FOR THE FOURTH MONTH IN ROW, THE PRODUCTION INDEX OF THE ITALIAN AUTOMOTIVE INDUSTRY: -13,7%. FIFTH DOUBLE-DIGIT DECREASE IN ROW FOR THE MOTOR VEHICLE MANUFACTURING SECTOR (-23.9%), WITH PASSENGER CARS AT -36.9% IN THE MONTH**

The index of the automotive production of parts and accessories reversed its trend in the month, showing a slowdown of 4.5%, with a contraction in turnover of 20.7%. Inexplicable the total absence, in the 2022 Budget Law, of measures to incentivize the purchase of zero and ultra-low emission cars and light commercial vehicles over a multi-year period, which are fundamental to support the sector and to drive consumers into the ecological transition

*Turin, January 13th 2022* - In November 2021, according to ISTAT data, the **Italian automotive production industry**<sup>1</sup> in the overall recorded a decrease of 13.7% respect to November 2020 (-5.3% respect to November 2019), while in the first eleven months of 2021 it increased by 21.6% (-9% respect to January-November 2019).

Looking at the **each manufacturing segments of the industry**, the index for motor vehicle manufacturing<sup>2</sup> (Ateco code 29.1) decreases of 23.9% in November 2021 and increases of 11.1% in the first eleven months of 2021 respect to the same period in 2020; the one related to the manufacture of bodies for motor vehicles, trailers and semi-trailers (Ateco code 29. 2) increases of 6.4% in the month and of 26.7% in the cumulative, and the one related to the manufacture of parts and accessories for motor vehicles and their engines<sup>3</sup> decreases of 4.5% in November (it was +0.7% in October 2020) and grows of 33.1% in the cumulative 2021.

According to preliminary data of ANFIA, **domestic production of cars** is, on the other hand, again in strong decrease: -36.9% in the month and -1.5% in the first eleven months of 2021 respect to the same period in 2020. Respect to 2019, cars produced are in slowdown of 10.4% in November and of 21.7% in the cumulative 2021.

The automotive manufacturing sector is in the context of the overall Italian industrial production in growth since March 2021, after 24 months with a minus sign: in November 2021, **the index of industrial production in the overall**<sup>4</sup> closed with +6.3% respect to

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<sup>1</sup>Ateco code 29: manufacture of motor vehicles, manufacture of bodywork for motor vehicles, trailers and semi-trailers and manufacture of parts and accessories for motor vehicles and their engines (excluding tyres).

<sup>2</sup> The term "motor vehicles" refers to passenger cars and light and heavy commercial vehicles.

<sup>3</sup> Ateco code 29.3, does not include tyres.

<sup>4</sup> Corrected for calendar effects: there were 21 working days in both November 2021 and November 2020 (excluding Construction). As of 2018, industrial production indices are published by ISTAT using the new reference base 2015=100 (until last month the base was 2010=100).

November 2020 (+1.9% respect to November 2019) and was in increase of 12.4% in the first eleven months of this year respect to the same period in 2020 (but in slowdown of 1.4% respect to January-November 2019).

The **turnover of the industry** (excluding the Manufacture sector) is in increase of 13.2% in October, the latest available data (+15.8% on the national market and +8.4% on foreign ones) and it closes the first ten months of 2021 with +23.2% (+25.2% the national market and +19.4% the foreign one).

*“In November, the index of Italian automotive production once again showed a negative sign (-13.7%), following the decreases already recorded in the previous three months - says Gianmarco Giorda, Director of ANFIA.*

*For the fifth month in row, the motor vehicle manufacturing index recorded a double-digit slowdown, -23.9%, and the index for the production of motor vehicle parts and accessories reversed the trend, closing November with -4.5%. Car production is also decrease, with the slowdown caused by the semiconductor shortage continuing to weigh on it.*

*In this context - with a car market that closed 2021 below the limit of 1.5 million registrations, with a December that shows a -27.5%, and in a period when measures for the carbon neutrality of mobility to 2030-2035 are being discussed at European level - it is inexplicable the total absence, in the Budget Law 2022, of measures to encourage the purchase of zero and ultra-low emission cars and light commercial vehicles over a multi-year period, which are essential to support the sector and to drive consumers in the ecological transition”.*

From January to September 2021 (latest available data), exports of motor vehicles (new cars and industrial vehicles) from Italy value 12 billion euros, while imports 18.3 billion. In terms of value, Germany is the leading destination country for exports of motor vehicles from Italy, with a 15.9% share, followed by France (15%) and the United States (14.6%).

In the same period, exports of automotive components valued 16.4 billion euros, with a positive balance of 4.4 billion euros.

**Turnover<sup>5</sup> in the automotive sector** in the overall shows a negative change of 20.6% in October (latest data available), with the domestic component in slowdown of 21.6% (foreign component in slowdown of 19.3%). In the cumulative from January to October 2021, turnover increased of 24.4% (national turnover +29.9% and foreign one +17.4%).

In the end, **the turnover from parts and accessories for motor vehicles and their engines** decreased of 20.7% in October (-22.8% for the domestic component and -18.7% for the foreign one). In the first ten months of 2021, the turnover index for this segment

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<sup>5</sup> Raw data. Updated data for November will be published by Istat on January 27, 2022.



shows an increase of 21.1%, with the domestic component growing of 24.8% (foreign of in growth of 18%).

*For more information:* ANFIA Press Office

Miriam Gangi - [m.gangi@anfia.it](mailto: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 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, unique 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

**Italian Association of Automotive Industry (ANFIA)**

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