Press Release

2021 CAR MARKET WITH LESS THAN 1.5 MILLION REGISTRATIONS, IN DECEMBER -27.5%, THE SIXTH CONSECUTIVE DOUBLE-DIGIT MONTHLY DECREASE, ON WHICH THE CHIP SHORTAGE AND CONSEQUENT DELAYS IN THE DELIVERY OF NEW VEHICLES CONTINUE TO WEIGH HEAVILY

Inexplicably, the 2022 Budget Law approved on 30 December last year does not imagine any multi-year incentive measures for the purchase of zero and ultra-low emission cars, nor any other measures to support the gradual recovery of the sector and, above all, the ecological and energy transition it is facing.
ANFIA will continue its dialogue with the institutions to urgently activate a structural plan to accompany the transition that includes three-year incentives for electrified cars and light commercial vehicles, together with industrial policy instruments that help companies

Turin, January 3rd 2022 – According to data published today by the Ministry of sustainable infrastructures and mobility, in December 2021 the Italian car market reached 86,679 registrations (-27.5%) respect to 119,620 units recorded in December 2020.

Volumes registered in the whole 2021 reached 1,457,952 units, 5.5% more than the ones in the January-December 2020 period. Respect to 2019, the January-December 2021 period is in decrease of 23.9%.

"In December the car market recorded, for the sixth consecutive month, a heavy double-digit decrease (-27.5%), despite one more working day in December 2021 respect to December 2020 (22 days against 21) - says **Paolo Scudieri, ANFIA President**.

2021 – a difficult year, without doubt, for the automotive market, which opened in the middle of a pandemic and was obstructed by supply problems and rising raw material prices, together with a worrying logistics crisis and, more recently, a surge in energy costs - closes with just under 1.5 million registered units, recovering respect to 2020 (+5.5%), but still a long way from the pre-covid levels of 2019 (-23.9%). Regarding the 2022 outlook for raw materials, if for steel the situation is likely to improve over the next few months, for microchips we will have to wait at least until 2023 and even on the logistics front we will not see a return to normality so quickly.

Unfortunately, inexplicably, the Budget Law 2022, approved on 30 December, does not include any multi-year incentive measure for the purchase of zero and ultra-low emission cars, nor any other measure to support the gradual recovery of the sector and, above all, the ecological and energy transition it is facing. On the other hand, the benefits of the 2021 incentives on the Italian automotive supply chain speak for *themselves: 21% of the incentivized cars in the 61-135 g/km CO_2 range, 23% of BEVs and PHEVs and just under 20% of light commercial vehicles were produced in Italian plants, with a turnover generated by Italian components of 280 million euros - in fact, for every car made in Italy, there are about 5. 500 euros of components made here, while there is a positive impact of 1,000 euros per car, for the Italian supply chain, for cars not produced in Italy[1].*

Our dialogue with the institutions will go on in order to urgently activate a structural plan to help the transition that includes three-year incentives for electrified cars and light commercial vehicles, together with industrial policy tools to support companies to convert and diversify their production, focusing on research and development and professional updating of personnel.

Until now, we are the only major European country not to have an incentive plan for the diffusion of new technologies in order to update the vehicle fleet. Moreover, the absence of a transition plan will have a heavy social impact on the sector, putting more than 70,000 jobs at risk in our country".

A detailed analysis of **registrations by fuel [2]**, the decrease of both diesel and petrol cars go on, with their market share steadily shrinking in favor of hybrid and electric ones. In December, the share of non-rechargeable hybrid cars is again the highest in the market.

Diesel cars, in slowdown of 43% in December, represent the 19.7% of the month's market and 22.2% of the whole market of 2021 (it was 32.7% in 2020). Since the beginning of the year, diesel cars show the biggest decrease, with registrations down of 28.6%. The market for petrol cars also decrease -42.1% with the 26.6% of share in December and -16.4% for the year, with a 30% share (-7.8 percentage points respect to 2020).

Alternative-fuel car registrations, on the other hand, represent the 53.7% of the December market and the 47.9% in the whole 2021, in slowdown of 5.9% in the month and in growth of 71.6% since the beginning of the year. Electrified cars represent the 43.6% of the December market and the 38.4% in the whole 2021. Among these, non-rechargeable hybrids increased of 0.2% in December with a 29.6% of share, while growing of 90.3% since the beginning of the year with a share of 29%. Rechargeables, in slowdown of 10.9% in the last month of the year, represent the 14% of the December market and the 9.4% of the whole year's one (in particular, plug-in hybrids represent the 6.9% of the month's market and the 4.8% in the cumulative, and electrics the 7.1% in the month and the 4.6% in the cumulative). In the end, gas-powered vehicles represent the 10.1% of the December market and the 9.5% of the year-over-year market; among these, LPG vehicles had a market share of 8.2% in the month and 7.3% in the cumulative period, and CNG vehicles 1.9% in the month and 2.2% in the cumulative period.

[1] Detailed analysis drafted by ANFIA on the Invitalia data of cars and light commercial vehicles subsidized by the 2021 Budget Law

[2] Temporary Data

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The excellent performance of Fiat Panda, Lancia Ypsilon and Fiat 500 hybrids still go on, which occupy, respectively, first, third and fourth place in the mild/full hybrid segment in the month and the top three positions from the beginning of 2021. Among PHEVs, Jeep Renegade and Compass are the best-selling models, both in December and for the year, followed by Peugeot 3008; while Fiat 500 is the absolute best-selling electric model in December and since the beginning of 2021.

Referring to the **market by segments**, in December, utility and super-utility cars represent the 34.8% of the market, in slowdown of 39.5%, while for the whole of 2021 their share was 39.2%, in growth of 6%. The best-selling model is still Fiat Panda, with Fiat 500 and Lancia Ypsilon at the second and at the third position. Cars in the middle segments have a market share of 10.1% in December (-42.9%) and of 11.1% in 2021 (-11.1%), with Fiat Tipo in first place since the beginning of the year.

SUVs with 51.7% market share in December, are in slowdown of 10.6%, and represent the 46.8% of the market in the cumulative, in increase of 12%. In detail, small SUVs represent the 24.8% of the market for the month and in decrease of 19.7% from December 2020, while grow 10.9% in the cumulative. Compact SUVs represent the 19.9%, in increase of 0.2% in the month and of 13.6% in the year. Medium SUVs, with a 5.8% share, decrease of 0.7% in the month and grow of 11.1% in the cumulative, while large SUV sales are 1.3% of the overall (in decrease of 6.6% in the month and grow of 11.8% in the whole 2021). 28.4% of SUV sales involve Stellantis Group passenger cars.

MPVs represent the 2.5% of the December market and 2.1% over the twelve months, in decrease both in the month (-22.2%) and in the cumulative (-21.5%).

According to the ISTAT survey, in December[3] there was a slight increase in the **consumer confidence index** (base 2010=100), which rose from 117.5 to 117.7, while the **composite index of business confidence** (Iesi) decrease from 114.8 to 113.1.

Referring to consumer confidence, moreover, with regard to durable goods, including motor vehicles, the index relating to the current opportunity to purchase increased respect to November 2021 (from -25.8 to -22.4).

According to the latest available ISTAT data, in November the **national consumer price index** registered an increase of 0.6% on a monthly basis and 3.7% on an annual basis (in increase from +3% in the previous month). The further acceleration in inflation is largely due to the prices of energy goods (in growth from +24.9% of October to +30.7%) and, in

[3] Starting from January 2021, Istat changes the methodology for estimating consumer survey variables. Time series of response percentage frequencies, balances, and climates have been calculated with the new estimator by calibration and are made available beginning January 1998.

particular, those of the non-regulated component (in growth from +15% to +24.3%), while the regulated component slowed slightly (from +42.3% to +41.8%).

In the non-regulated energy goods segment, looking at fuel price trend, the prices of **Diesel** accelerated (from +23.5% to +27.9%; in growth of 3% on the previous month), those of **Petrol** (from +22.1% to +25.3%; in growth of 2.2% on the previous month), and the prices of **Other fuels** (in growth of 33% to +45.8%; up 10% on October).

The **Stellantis Group**, in the overall registered 31,833 vehicles in the month (-34.7%), with a market share of 36.7%.

In cumulative terms since the beginning of 2021, the Group's total registrations reached 551,421 units (+2.7%), with a market share of 37.8%.

There are seven models of the Stellantis Group in the **top ten in December**, with Fiat Panda always leading the ranking (6,524 units), followed in fourth place by Lancia Ypsilon (2,210) and in fifth place by Fiat 500X (2,095). In sixth position Jeep Renegade (2,074), followed, in seventh place, by Fiat 500 (1,751), and, in eighth place, by Jeep Compass (1,680), while, in ninth, stands Peugeot 3008 (1,619).

In the end, the **second hand car market** reached 274,998 transfers of ownership before mini-transfers to dealerships in December 2021, 0.6% less than in December 2020. In the whole 2021, there are 3,452,755 ownership transfers, in growth 14.4% respect to 2020.

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ANFIA – Italian Association of the Automotive Industry
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
5,546 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 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	2021	*%*	2020	*%*	*21/20*	2021	*%*	2020	*%*	*21/20*
STELLANTIS Group*	***31.833***	***36,7***	***48.728***	***40,7***	***-34,7***	***551.421***	***37,8***	***537.071***	***38,9***	***+2,7***
FIAT	13.503	15,6	19.547	16,3	-30,9	223.567	15,3	211.345	15,3	+5,8
PEUGEOT	5.418	6,3	7.935	6,6	-31,7	84.263	5,8	81.637	5,9	+3,2
CITROEN	2.911	3,4	5.255	4,4	-44,6	64.867	4,4	64.374	4,7	+0,8
JEEP	3.840	4,4	5.461	4,6	-29,7	63.629	4,4	59.602	4,3	+6,8
OPEL	2.312	2,7	3.596	3,0	-35,7	53.660	3,7	53.883	3,9	-0,4
LANCIA	2.210	2,5	4.728	4,0	-53,3	43.679	3,0	43.024	3,1	+1,5
ALFA ROMEO	973	1,1	1.676	1,4	-41,9	11.300	0,8	17.214	1,2	-34,4
DS	520	0,6	391	0,3	+33,0	4.810	0,3	4.633	0,3	+3,8
MASERATI	146	0,2	139	0,1	+5,0	1.646	0,1	1.359	0,1	+21,1
VW Group	***14.019***	***16,2***	***20.969***	***17,5***	***-33,1***	***234.583***	***16,1***	***230.766***	***16,7***	***+1,7***
VOLKSWAGEN	7.555	8,7	12.612	10,5	-40,1	126.092	8,6	128.169	9,3	-1,6
AUDI	2.998	3,5	3.773	3,2	-20,5	55.719	3,8	49.837	3,6	+11,8
SKODA	1.331	1,5	1.744	1,5	-23,7	24.965	1,7	24.661	1,8	+1,2
SEAT	1.258	1,5	2.409	2,0	-47,8	21.264	1,5	22.140	1,6	-4,0
PORSCHE	867	1,0	422	0,4	+105,5	6.245	0,4	5.689	0,4	+9,8
LAMBORGHINI	10	0,0	9	0,0	+11,1	298	0,0	270	0,0	+10,4
RENAULT Group	***9.404***	***10,8***	***12.222***	***10,2***	***-23,1***	***136.240***	***9,3***	***139.310***	***10,1***	***-2,2***
RENAULT	4.760	5,5	8.656	7,2	-45,0	74.544	5,1	85.899	6,2	-13,2
DACIA	4.644	5,4	3.566	3,0	+30,2	61.696	4,2	53.411	3,9	+15,5
TOYOTA Group	***6.364***	***7,3***	***8.410***	***7,0***	***-24,3***	***89.549***	***6,1***	***75.218***	***5,4***	***+19,1***
TOYOTA	6.029	7,0	8.057	6,7	-25,2	84.850	5,8	71.174	5,2	+19,2
LEXUS	335	0,4	353	0,3	-5,1	4.699	0,3	4.044	0,3	+16,2
FORD	***3.715***	***4,3***	***6.766***	***5,7***	***-45,1***	***80.989***	***5,6***	***89.573***	***6,5***	***-9,6***
HYUNDAI Group	***4.456***	***5,1***	***3.619***	***3,0***	***+23,1***	***88.892***	***6,1***	***68.847***	***5,0***	***+29,1***
HYUNDAI	2.376	2,7	1.700	1,4	+39,8	45.001	3,1	33.389	2,4	+34,8
KIA	2.080	2,4	1.919	1,6	+8,4	43.891	3,0	35.458	2,6	+23,8
BMW Group	***4.967***	***5,7***	***4.731***	***4,0***	***+5,0***	***69.591***	***4,8***	***62.612***	***4,5***	***+11,1***
BMW	3.138	3,6	3.534	3,0	-11,2	51.276	3,5	46.022	3,3	+11,4
MINI	1.829	2,1	1.197	1,0	+52,8	18.315	1,3	16.590	1,2	+10,4
DAIMLER Group	***3.225***	***3,7***	***3.680***	***3,1***	***-12,4***	***54.203***	***3,7***	***50.501***	***3,7***	***+7,3***
MERCEDES	2.749	3,2	3.153	2,6	-12,8	47.325	3,2	45.927	3,3	+3,0
SMART	476	0,5	527	0,4	-9,7	6.878	0,5	4.574	0,3	+50,4
SUZUKI	***1.482***	***1,7***	***2.382***	***2,0***	***-37,8***	***39.317***	***2,7***	***33.459***	***2,4***	***+17,5***
NISSAN	***1.666***	***1,9***	***2.481***	***2,1***	***-32,8***	***27.211***	***1,9***	***28.356***	***2,1***	***-4,0***
VOLVO	***802***	***0,9***	***1.646***	***1,4***	***-51,3***	***18.744***	***1,3***	***17.058***	***1,2***	***+9,9***
JAGUAR LAND ROVER Grou	***628***	***0,7***	***906***	***0,8***	***-30,7***	***15.774***	***1,1***	***14.856***	***1,1***	***+6,2***
LAND ROVER	487	0,6	674	0,6	-27,7	11.756	0,8	11.321	0,8	+3,8
JAGUAR	141	0,2	232	0,2	-39,2	4.018	0,3	3.535	0,3	+13,7
MAZDA	***538***	***0,6***	***607***	***0,5***	***-11,4***	***12.396***	***0,9***	***10.097***	***0,7***	***+22,8***
DR	***829***	***1,0***	***348***	***0,3***	***+138,2***	***8.362***	***0,6***	***3.485***	***0,3***	***+139,9***
HONDA	***321***	***0,4***	***362***	***0,3***	***-11,3***	***6.402***	***0,4***	***6.705***	***0,5***	***-4,5***
TESLA	***633***	***0,7***	***924***	***0,8***	***-31,5***	***6.045***	***0,4***	***3.805***	***0,3***	***+58,9***
MITSUBISHI	***157***	***0,2***	***213***	***0,2***	***-26,3***	***3.928***	***0,3***	***4.035***	***0,3***	***-2,7***
SUBARU	***251***	***0,3***	***220***	***0,2***	***+14,1***	***2.404***	***0,2***	***2.099***	***0,2***	***+14,5***
FERRARI	***10***	***0,0***	***17***	***0,0***	***-41,2***	***579***	***0,0***	***506***	***0,0***	***+14,4***
ALTRE	***1.379***	***1,6***	***389***	***0,3***	***+254,5***	***11.322***	***0,8***	***3.397***	***0,2***	***+233,3***
	0		0							
TOTALE MERCATO	86.679	100,0	119.620	100,0	-27,5	1.457.952	100,0	1.381.756	100,0	+5,5

Fonte: CED - Ministero delle Infrastrutture e della Mobilità sostenibili

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/12/2021

* Fino al 2020 Alfa Romeo, Fiat, Jeep e Lancia erano conteggiati nel Gruppo FCA, Citroen, DS, Opel e Peugeot nel Gruppo PSA

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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 2021[1] *DECEMBER 2021*
1	FIAT	PANDA	6.524
2	DACIA	DUSTER	2.713
3	TOYOTA	YARIS CROSS	2.389
4	LANCIA	YPSILON	2.210
5	FIAT	500X	2.095
6	JEEP	RENEGADE	2.074
7	FIAT	500	1.751
8	JEEP	COMPASS	1.680
9	PEUGEOT	3008	1.619
10	VOLKSWAGEN	POLO	1.546

N.	MARCA *Make*	MODELLO *Model*	GEN/DIC 2021 *JAN/DIC 2021*
1	FIAT	PANDA	110.889
2	FIAT	500[2]	47.982
3	LANCIA	YPSILON	43.692
4	JEEP	RENEGADE	34.591
5	TOYOTA	YARIS	32.498
6	FIAT	500X	31.830
7	CITROEN	C3	29.498
8	DACIA	SANDERO	28.965
9	VOLKSWAGEN	T-ROC	28.342
10	FORD	PUMA	28.335

Fonte: CED - Ministero delle Infrastrutture e della Mobilità sostenibili

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/12/2021

[1] Fiat 500 non comprende versione Elettrica e marchio Abarth, con le quali raggiungerebbe la seconda posizione

[2] Comprende versione Elettrica e marchio Abarth

Associazione Nazionale Filiera Industria Automobilistica

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