

Press Release

**ITALIAN CAR MARKET SLIGHTLY OVER 1.3 MILLION OF UNITS IN 2022 (-9.7%),
WITH DECEMBER IN DOUBLE-DIGIT GROWTH (+21%) FOR THE THIRD MONTH IN ROW,
IN COMPARISON WITH THE STRONG SLOWDOWN OF DECEMBER 2021 (-27.5%)**

In continuity with the planning of the Automotive Fund born in 2022, are available since today the 2023 incentives on the purchase of new zero and low-emission cars, 575 million of Euro this way divided: 0-20, 21-60 and 61-135 g/km of CO₂, bookable from January 10th - the hope is that they could push the green vehicles since the beginning of the year. An essential factor in the spread of electric mobility among private individuals, however, is the quickly implementation of the measure to incentivize the purchase of wall-boxes and domestic electric charging stations, introduced last August and extended to 2023 and 2024, with a specific annual allocation, through the Decreto Milleproroghe, but not yet operational

Turin, January 2nd 2023 - According to data published today by the Ministry of Infrastructure and Sustainable Mobility, in December 2022 the Italian car market registered 104,915 registrations (+21%) against 86,718 units registered in December 2021.

In the whole 2022 the overall volumes registered 1,316.702 units, against 1,458.032 registered from January to December 2021, with a slowdown of 9.7%.

"In December 2022, for the third month in row, the car market registered a double digit growth (+21%), in comparison with the strong slowdown of the same month in 2021 (-27.5%) - says Paolo Scudieri, President of ANFIA.

The year just ended, in line with prevision, sees the volumes of registrations slightly over 1.3 million of units, which means the 9.7% less respect to 2021.

In 2022, the context in which the automotive supply chain operated, already marked by the crisis in semiconductors, raw materials and logistics, worsened further as a result of the repercussions of the conflict in Ukraine, which triggered a serious energy crisis and further bottlenecks in European and global supply chains. But it was also the year when, at last, a specific Automotive Fund with a multi-year planning, until 2030, of the resources allocated, both for demand support measures, for the diffusion of zero and ultra-low emission technologies, and for accompanying tools for the productive reconversion of the supply chain, could be counted on.

In continuity with this planning of low emissions: an allocation of 575 million of Euro divided into the incentive brackets 0-20 g/km of CO₂ (electric vehicles), 21-60 g/km of CO₂ (hybrid plug-in vehicles) and 61-135 g/km di CO₂ (traditional hybrid and

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endothermic low emissions vehicles, with the obligation scrapping the old car), the first two available, thanks also to car rental, from January 10th. The hope is that this measure could push the green vehicles since the beginning of the year. The hope for however, is that the 250-260 millions of euro we estimated as the 2022 incentive 'surplus' will be reallocated, for 2023, to the 0-20 e 61-135 g/km of CO₂ incentive brackets.

We welcome the news of the extension to 2023 and 2024, with a specific annual appropriation, through the Decreto Milleproroghe, of the incentive measure for the purchase of wall-boxes and domestic electric charging stations, already introduced, for 2022, last August, but not yet operational. We expect its quick implementation since it is an essential factor in the spread of electric mobility in the private sales channel.

Finally, we trust in a forthcoming recalibration of the funds already allocated for investments in the automotive supply chain (€14 billion between the Automotive Fund and PNRR) and a reshaping of the innovation agreements and development contracts currently in force - the latter refinanced until 2037 with the Budget Law”.

Analysing **registrations by fuel type** in detail ¹, petrol cars saw their market of December grow of 18.6%, with a market share of 26.1%, while diesel cars grow of 23.2% respect to the same month of 2021, with a market share of 20.1%. In the twelve months, petrol cars registered decrease of 16.3% (share: 27.8%) and diesel ones of 20.1% (share: 19.6%).

Alternative-fuel car registrations represent the 53.8% of registrations of only December, in growth of 21.4%, and of 52.6% in the whole 2022, in slowdown of 0.7%. Electrified cars represent the 43.8% of the market in December, in growth of 21.6%, while in the whole 2022, with a share of 42.9% in growth of 0.8%. Among them, non-rechargeables hybrids grow of 39.2% during the month, reaching a market share of 34.3% while, during the twelve months grow of 6.8%, with a market share of 34%. Rechargeables cars registrations decrease of 16.6% in December representing the 9.5% of the market (-17.1% and 8.9% of share in the whole 2022). Among them, the market share of electric cars is of 4.3% and decrease of 26.5%, while hybrids-plug decrease of 6% and represent the 5.2% of the December registrations. From January to December 2022, BEV and PHEV both decrease, respectively of 26.9% and of 8.1%.

In the end, gas-powered cars represent the 10% of the registrations of December, among them the 9.5% is represented by LPG cars (+40.5%) and of 0.5% by CNG cars (-67%). Since the beginning of 2022, LPG cars are in growth of 10.5% and CNG ones in slowdown of 65.9%.

¹ Temporary Data

In 2022, Fiat Panda, Lancia Ypsilon and Fiat 500 hybrids are, respectively at the first, the second and the fourth place in the mild/full hybrid segment. Among PHEV, Jeep Compass is the best sold model in 2022, followed by Jeep Renegade. Among electric cars, Fiat 500 is again the best sold model since the beginning of the year.

DR Automobiles triple the sales of its models on the Italian market, with a growth respect to 2021 of 192.8%.

Referring to the **market by segments**, during December, utility and super utility cars represent the 31.5% of the market, in growth of 10.4%. The best sold model is always Fiat Panda. The market share for cars in the middle segment is 11.1% in December, with a market in growth of 32.6% respect to the last month of 2021.

The SUVs market share is of 54.5% during the month, in growth of 26.6%. In detail, small SUVs represent the 25.1% of the market during the month (+20.3% respect to December 2021), compact SUVs represent the 21.2% (+30.4%), the market share of medium SUVs is 6.4%, (+34.3%), while the sales of large SUVs of 1.7% of the overall (+58.6%). The 22.6% of the SUVs sold belong to Stellantis Group.

MVPs represent the 1.1% of the December market and lose the 45,8% of volumes respect to December 2021.

Since the beginning of 2022 , utility and super-utility got a share of 35.6% (-17.7% respect to 2021), medium of 10% (-18.1%), SUVs of 51.6% (-0.7%) and MVPs of 1.8% (-24.9%).

According to the ISTAT survey, in December is estimated an increase both for **consumer confidence index** (base 2010=100), which goes from 98.1 to 102.5, and for **composite index of business confidence** (lesi), from 106.5 to 107.8, for the second month in row.

Referring to consumer confidence, moreover, the index improve in all sectors except for manufacture, where it worse, going from 102.5 to 101.4.

According to the latest available ISTAT data, in November the **national consumer price index** registered a growth of 0.5% per month and of 11.8% per year (like in the previous month, confirming the preliminary prevision). The trend of inflation which remains stable is largely due to, the contrasting trends in some expenditure aggregates: on one side non-regulated energy goods (from +79.4% to +69.9%), of unprocessed foodstuffs and of transport-related services prices (from +7.2% to +6.8 %) decrease; on the other, regulated energy goods (from +51.6% to +57.9%), food goods and to recreational and cultural services and for the selfcare prices accelerate.

The trend of the prices of non-regulated energy goods is due to decrease of the free market electricity prices (from +329% to +239%; +6.1% respect to October) and to lesser

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extent, of heating diesel (from +36.4% to +32%; -0.3% per month), of Diesel fuel for means of transport (from +16.8% to +13.4%; zero change the trend respect to October), of other fuels (from +27.2% to +5.2%; -9% the trend) and of petrol (from -2.2% to -3.2%; +1.2% during the month); gas prices of the cities and of free market natural gas register a trend of growth of 0.5%.

Stellantis Group, in the overall, reached during the month 32,952 registrations (+3.5%), with a market share of 31.3%.

In the whole 2022, the overall of registrations reached 463,804 units (-15.9%), with a market share of 35.2%.

Four models belong to the **Stellantis Group** are still in the **top ten of December**, with Fiat Panda always stable at the top of the chart (8,533 units), followed, at the second place, by Jeep Renegade (3,299), which gains four places respect to the previous month, and at the fourth place by Lancia Ypsilon (2,586). At the ninth place, in the end, Fiat Tipo (1,752). Stellantis Group win also the podium of the **2022 top ten**: at the first place always Fiat Panda (103,835 units), at the second Lancia Ypsilon (40,949) and at the third Fiat 500 (35,995).

In the end, the **second hand car market** reached 402,769 transfers of ownership before mini-transfers to dealerships in December 2022, the 46.5% more respect to December 2021. In the whole 2022, transfers of ownership have been 4,645.339, in growth of 34,5% respect to 2021.

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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

5,156 companies

268,300 employees (direct and indirect), more than 7% of the employees in the Italian manufacturing sector

92,7 billion Euros of turnover which means 9.3% of the Italian manufacturing sector turnover and of 5,2% of the Italian GDP

76,3 billion Euros of tax levy of motorization

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