Press Release

THE CAR MARKET IN ITALY HAD A POSITIVE PERFORMANCE IN JUNE, BUT THE GROWTH RATE SLOWED DOWN TO +9.2%. DESPITE THIS IMPROVEMENT, THERE IS A SIGNIFICANT NEGATIVE CONTRAST OF -19% WHEN COMPARED TO 2019. SALES FOR THE FIRST HALF OF 2023 HAVE SURGED BY 23% COMPARED TO 2022

During the summer months, vehicle registrations tend to decrease naturally. As a result, potential buyers often wait for redesigned incentives to be introduced to support the demand for low-emission vehicles. The development of charging infrastructure for electric cars faces numerous obstacles, ranging from technical and bureaucratic hurdles to a need for implementing decrees

Turin, 3rd July 2023 – According to data published today by the Ministry of Infrastructure and Transport, in June 2023, the Italian car market recorded 138,927 registrations (+9.2%), compared to 127,232 units in June 2022.

In the first half of 2023, the total volume amounted to 841,343 units, an increase of 23% compared to January-June 2022.

Roberto Vavassori, President of ANFIA, reported that *"the Italian car market showed modest growth in June 2023, with an increase of 9.2% compared to a drastic drop of 15% in June 2022. However, the figure for 2019, the last almost average year for sales in the sector, still needs to be revised, with more than 19% of sales still to be recovered.*

In the summer months, car registrations usually follow a natural downward trend. Additionally, potential buyers are waiting for the revision of incentives currently in place to purchase ultra-low and zero-emission vehicles. These incentives need to be implemented as soon as possible to stimulate demand and accelerate the renewal of the circulating fleet from a green perspective.

Various tools and technologies are required to make this transition viable and sustainable. The industry and policymakers must work together based on open and fair dialogue.

The supply chain is optimistic about the hypothetical 'Agreement for the Transition and Industrial Re-launch of the Automotive Supply Chain' being developed by the government in collaboration with various ministries and coordinated by the Ministry of Enterprise and Made in Italy.

One of the crucial issues in this dialogue is the development of recharging infrastructures. Italy still needs to catch up in this regard, even though it is a priority element in the transition to electrification. Unfortunately, some of the tools that the government is using to support the charging network are struggling to get off the ground. The *implementing decree for the incentive measure to purchase wall boxes and home charging stations for private charging is still pending. Additionally, a significant portion of the PNRR funds from the first call for proposals to finance the installation of charging stations on motorways (major suburban roads) have yet to be used. The short deadline for operator applications and various technical and bureaucratic hurdles have resulted in a partial outcome. ANFIA hopes that the unused contributions can be reused".*

Analysing registrations by **fuel type** in detail[1] petrol cars increased by 6.7% in June, with a market share of 28.7%, while diesel cars decreased by 2.4% in the same month in 2022, with a market share of 18.3%. In the first six months of 2023, registrations of petrol cars increased by 24.2% and diesel cars by 17.1%, with market shares of 28.1% and 19.1% respectively.

In June alone, alternative fuel cars accounted for more than half of the market (53%), with a 15.5% increase compared to June 2022. Cumulatively, they grew by 24.5%, with a share of 52.7%. Of these, electrified cars accounted for 44.4% of the market in June and 43.8% cumulatively, up 23.3% for the month and 27.6% for the six months.

Specifically, non-rechargeable hybrids grew by 30.5% in the month with 34.6%; cumulatively, they grew by 30.9% with a share of 35.2%.

Registrations of rechargeable cars increased by 3.1% in June and accounted for 9.8% of the market in the month (10.3% in June 2022); in the first six months, they grew by 15.7% and had a share of 8.5% (0.5 p.p. less than in the first six months of 2022).

Electric cars have a share of 4.4% in the month and 3.9% in the first six months, up 0.7% in June and 31.2% cumulatively. Plug-in hybrids rose by 5.3% in June and maintained a positive cumulative change (+5.2% over six months), accounting for 5.3% of monthly registrations and 4.6% of the total since the beginning of the year.

Finally, gas-powered cars accounted for 8.6% of registrations in June, almost exclusively LPG cars (-4.7% in the month). A marginal 0.1% was accounted for by natural gas cars, which fell by 91.5% in the month. Cumulatively, CNG fell by 86.4%, and LPG rose by 23.8%; since the beginning of the year, the two fuels together account for around 8.9% of the market (of which only 0.1% is CNG).

For the month, the Fiat Panda, Lancia Ypsilon, and Fiat 500 hybrids were the first, second and fifth most popular mild/full hybrid cars, respectively. The Jeep Compass is the best-selling model among PHEVs, while the Jeep Renegade is fourth. The Alfa Romeo Tonale is in seventh place. Among electric cars, the Fiat 500 is the third best-selling model of the month after the Tesla Model Y and Model 3, while the Peugeot 208 is in eighth place.

[1] Provisional Data

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DR Automobiles' market is still growing, with its DR, EVO and Sportequipe brands up 11.7% year-on-year and 70.1% in the first half of 2022. The Molise manufacturer gained 1.8% market share in the month and 2% overall.

Looking at the **market by segment**, in June the small car and light commercial vehicle market share was 29.3%, a decrease of 8.0% compared to the previous period. The Fiat Panda remained the best-selling model in this category, with the Lancia Ypsilon and the Fiat 500 among the top ten.

The mid-size car market share for June was 12.2%, and the market increased by 25% compared to June 2022.

SUVs had a 55.9% market share in June, which is an increase of 18.6%. Small SUVs accounted for 8.4% of the market (+36.3% compared to June 2022), compact SUVs 32.4% (+5.8%), medium SUVs 10.9% (+54.8%), and large SUVs accounted for 4.2% of the total sales (+26.7%). Of the SUVs sold in June, 27.5% were from a Stellantis Group brand.

Since the beginning of 2023, the market share of small cars and MPVs has been 31.1%, an increase of 5.8% compared to the first six months of 2022. The market share of medium-sized vehicles was 11.6%, an increase of 45.0%. The market share of SUVs was 55.0%, an increase of 32.1%. On the other hand, the share of vans and MPVs is becoming increasingly marginal (1.3% over the year, -14.8%).

Based on the ISTAT survey, the **consumer confidence index** (with the base year being 2010) is expected to increase from 105.1 to 108.6 in June. However, the **composite business confidence index** (Iesi) will likely decrease from 108.6 to 108.3.

Regarding consumer confidence, the index that measures the current ability to purchase durable goods, including cars, has improved from -81.6 to -77 compared to May, the previous month.

According to the initial estimates by ISTAT, there was no change in the **national consumer price index** on a monthly basis. However, there was an increase of 6.4% on an annual basis in June, which is a slowdown when compared to the previous month's growth of 7.6%. The decrease in the inflation rate can be attributed to the drop in the prices of non-regulated energy goods (from +20.3% to +8.4%) and, to some extent, processed food, transport services (from +5.6% to +3.8%), other goods, and recreational, cultural, and personal services.

The prices of gas, natural gas, and electricity on the free market decreased (from +50.8% to +28.8% and from +40.4% to +18.7%, respectively). The **petrol** prices decreased (from -1.3% to -9.6%, with a cyclical increase of 0.5%) as did the **diesel** prices for transport (from -8.7% to -14.4%, which was not cyclical). The prices of other solid fuels decreased from

+18.5% to +16.4%, the prices of heating oil decreased from -16.5% to -21.6%, and the prices of **other fuels** decreased from -9.3% to -10.2%, with a cyclical decrease of 4.0%.

The **Stellantis Group** had a total of 43,458 registrations in June, which is a decrease of 10.8%. Their market share was 31.3%. However, in the first half of 2023, they had 281,243 registrations, an increase of 10.3%. Their market share in this period was 33.4%.

Four of the **top ten models in June** were from the Stellantis Group. The Fiat Panda remained at the top with 6,705 units. The Lancia Ypsilon came in third with 4,344 units, while the Fiat 500X moved up one position to seventh place with 2,766 units. The Alfa Romeo Tonale came in tenth place with 2,294 units.

The **used car market** had 417,251 ownership transfers before mini-transfers to dealers in June 2023, a 12.5% increase compared to June 2022. In the first six months of 2023, there were 2,531,385 transfers of ownership, which is an 8.3% increase compared to 2022.

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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
5,528 companies
274,600 employees (direct and indirect), more than 7% of the employees in the Italian manufacturing sector
86,2 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

Comunicato Stampa

ITALIA - IMMATRICOLAZIONI AUTOVETTURE
ITALY - NEW CAR REGISTRATIONS

dati provvisori/*provisional data*

	GIUGNO *JUNE*				VAR. % *% CHG.*	GENNAIO/GIUGNO *JANUARY/JUNE*				VAR. % *% CHG.*
MARCA/MAKE	2023	%	2022	%	*23/22*	2023	%	2022	%	*23/22*
STELLANTIS Group*	***43.458***	***31,3***	***48.697***	***38,3***	***-10,8***	***281.243***	***33,4***	***255.069***	***37,3***	***+10,3***
FIAT	13.012	9,4	16.809	13,2	-22,6	93.697	11,1	98.650	14,4	-5,0
PEUGEOT	7.583	5,5	9.560	7,5	-20,7	48.161	5,7	40.506	5,9	+18,9
CITROEN	4.147	3,0	5.899	4,6	-29,7	27.721	3,3	30.056	4,4	-7,8
JEEP	6.206	4,5	5.124	4,0	+21,1	39.952	4,7	28.582	4,2	+39,8
OPEL	3.989	2,9	5.227	4,1	-23,7	26.621	3,2	26.018	3,8	+2,3
LANCIA	4.345	3,1	3.717	2,9	+16,9	23.865	2,8	21.484	3,1	+11,1
ALFA ROMEO	3.019	2,2	1.434	1,1	+110,5	14.611	1,7	5.683	0,8	+157,1
DS	682	0,5	653	0,5	+4,4	4.392	0,5	3.210	0,5	+36,8
MASERATI	475	0,3	274	0,2	+73,4	2.223	0,3	880	0,1	+152,6
VW Group	***24.492***	***17,6***	***20.857***	***16,4***	***+17,4***	***141.129***	***16,8***	***109.864***	***16,1***	***+28,5***
VOLKSWAGEN	11.414	8,2	10.253	8,1	+11,3	68.257	8,1	53.901	7,9	+26,6
AUDI	6.532	4,7	4.409	3,5	+48,2	36.420	4,3	26.284	3,8	+38,6
SKODA	3.105	2,2	2.325	1,8	+33,5	17.451	2,1	12.341	1,8	+41,4
SEAT	1.275	0,9	1.533	1,2	-16,8	6.913	0,8	7.923	1,2	-12,7
CUPRA	1.634	1,2	1.721	1,4	-5,1	8.005	1,0	5.995	0,9	+33,5
PORSCHE	491	0,4	581	0,5	-15,5	3.849	0,5	3.230	0,5	+19,2
LAMBORGHINI	41	0,0	35	0,0	+17,1	234	0,0	190	0,0	+23,2
RENAULT Group	***15.300***	***11,0***	***15.056***	***11,8***	***+1,6***	***88.242***	***10,5***	***66.444***	***9,7***	***+32,8***
DACIA	7.801	5,6	9.301	7,3	-16,1	46.678	5,5	37.432	5,5	+24,7
RENAULT	7.499	5,4	5.755	4,5	+30,3	41.564	4,9	29.012	4,2	+43,3
TOYOTA Group	***8.232***	***5,9***	***8.580***	***6,7***	***-4,1***	***54.272***	***6,5***	***46.770***	***6,8***	***+16,0***
TOYOTA	7.837	5,6	8.393	6,6	-6,6	52.316	6,2	44.966	6,6	+16,3
LEXUS	395	0,3	187	0,1	+111,2	1.956	0,2	1.804	0,3	+8,4
HYUNDAI Group	***8.803***	***6,3***	***7.532***	***5,9***	***+16,9***	***50.597***	***6,0***	***41.961***	***6,1***	***+20,6***
KIA	4.081	2,9	3.614	2,8	+12,9	25.228	3,0	21.639	3,2	+16,6
HYUNDAI	4.722	3,4	3.918	3,1	+20,5	25.369	3,0	20.322	3,0	+24,8
FORD	***7.494***	***5,4***	***4.028***	***3,2***	***+86,0***	***46.979***	***5,6***	***40.416***	***5,9***	***+16,2***
BMW Group	***6.904***	***5,0***	***5.136***	***4,0***	***+34,4***	***41.052***	***4,9***	***33.015***	***4,8***	***+24,3***
BMW	5.257	3,8	4.061	3,2	+29,5	30.618	3,6	24.925	3,6	+22,8
MINI	1.647	1,2	1.075	0,8	+53,2	10.434	1,2	8.090	1,2	+29,0
DAIMLER Group	***4.493***	***3,2***	***4.696***	***3,7***	***-4,3***	***28.331***	***3,4***	***24.657***	***3,6***	***+14,9***
MERCEDES	4.128	3,0	3.942	3,1	+4,7	25.863	3,1	22.039	3,2	+17,4
SMART	365	0,3	754	0,6	-51,6	2.468	0,3	2.618	0,4	-5,7
NISSAN	***3.007***	***2,2***	***2.952***	***2,3***	***+1,9***	***17.830***	***2,1***	***14.053***	***2,1***	***+26,9***
MG	***3.371***	***2,4***	***619***	***0,5***	***+444,6***	***14.226***	***1,7***	***2.656***	***0,4***	***+435,6***
LYNK&CO	***323***	***0,2***	***376***	***0,3***	***-14,1***	***2.985***	***0,4***	***1.481***	***0,2***	***+101,6***
DR	***2.455***	***1,8***	***2.198***	***1,7***	***+11,7***	***16.666***	***2,0***	***9.796***	***1,4***	***+70,1***
SUZUKI	***3.128***	***2,3***	***1.509***	***1,2***	***+107,3***	***18.141***	***2,2***	***11.021***	***1,6***	***+64,6***
VOLVO	***1.818***	***1,3***	***1.080***	***0,8***	***+68,3***	***9.503***	***1,1***	***6.765***	***1,0***	***+40,5***
JAGUAR LAND ROVER Group	***1.383***	***1,0***	***1.011***	***0,8***	***+36,8***	***5.959***	***0,7***	***5.270***	***0,8***	***+13,1***
LAND ROVER	1.128	0,8	804	0,6	+40,3	5.004	0,6	3.972	0,6	+26,0
JAGUAR	255	0,2	207	0,2	+23,2	955	0,1	1.298	0,2	-26,4
MAZDA	***1.159***	***0,8***	***534***	***0,4***	***+117,0***	***8.116***	***1,0***	***4.688***	***0,7***	***+73,1***
HONDA	***476***	***0,3***	***590***	***0,5***	***-19,3***	***2.854***	***0,3***	***4.323***	***0,6***	***-34,0***
TESLA	***1.751***	***1,3***	***1.143***	***0,9***	***+53,2***	***8.518***	***1,0***	***2.551***	***0,4***	***+233,9***
MITSUBISHI	***80***	***0,1***	***168***	***0,1***	***-52,4***	***736***	***0,1***	***1.225***	***0,2***	***-39,9***
SUBARU	***288***	***0,2***	***146***	***0,1***	***+97,3***	***1.464***	***0,2***	***880***	***0,1***	***+66,4***
FERRARI	***54***	***0,0***	***66***	***0,1***	***-18,2***	***393***	***0,0***	***398***	***0,1***	***-1,3***
ALTRE	***458***	***0,3***	***258***	***0,2***	***+77,5***	***2.107***	***0,3***	***959***	***0,1***	***+119,7***
TOTALE MERCATO	138.927	100,0	127.232	100,0	+9,2	841.343	100,0	684.262	100,0	+23,0

Fonte: CED - Ministero delle Infrastrutture e della Mobilità sostenibili

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 30/06/2023

* 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*

maggio/May

TOP 10

N.	MARCA *Make*	MODELLO *Model*	GIUGNO 2023 *JUNE 2023*
1	FIAT	PANDA	6.705
2	DACIA	SANDERO	4.500
3	LANCIA	YPSILON	4.344
4	FORD	PUMA	3.161
5	TOYOTA	TOYOTA YARIS CROSS	2.901
6	VOLKSWAGEN	T-ROC	2.834
7	FIAT	500X	2.766
8	DACIA	DUSTER	2.448
9	MG	MG ZS	2.351
10	ALFA ROMEO	TONALE	2.294

N.	MARCA *Make*	MODELLO *Model*	GEN/GIU 2023 *JAN/JUN 2023*
1	FIAT	PANDA	50.143
2	DACIA	SANDERO	25.882
3	LANCIA	YPSILON	23.699
4	FIAT	500	20.618
5	TOYOTA	YARIS CROSS	19.523
6	JEEP	RENEGADE	18.716
7	VOLKSWAGEN	T-ROC	17.797
8	FIAT	500X	16.549
9	RENAULT	CAPTUR	16.186
10	FORD	PUMA	16.141

Fonte: CED - Ministero delle Infrastrutture e della Mobilità sostenibili

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 30/06/2023

1 Comprende versione Elettrica e marchio Abarth

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