Press Release

THE ITALIAN CAR MARKET CONTINUED TO GROW IN JULY (+8.8%), BUT THE SLOWDOWN IN GROWTH SEEN IN THE PREVIOUS MONTH CONTINUED. THE VOLUME RECORDED WAS 22.3% LOWER THAN IN JULY 2019

While the summer will bring a natural slowdown in sales, the oft-repeated revision of incentives for purchasing green cars is awaited

Turin, 1st August 2023 – According to data published today by the Ministry of Infrastructure and Transport, in July 2023, the Italian car market recorded 119,207 registrations (+8.8%), compared to 109,611 units in July 2022.

In January-July 2023, the total volume amounted to 960,765 units, an increase of 21% compared to January-July 2022.

Roberto Vavassori, President of ANFIA, reports that *"in July 2023, the Italian car market saw a slight increase in growth compared to the previous month. However, it still shows a slowdown compared to July 2022, which decreased by 0.8%. However, the car market still has a gap of 22.3% to close with the pre-pandemic period of July 2019.*

As the summer typically brings a dip in sales, the industry is eagerly awaiting the announcement of new incentives to encourage the purchase of eco-friendly cars. These incentives will help promote the use of low and zero-emission vehicles and ultimately support the European Green Deal's goal of decarbonising mobility".

Analysing registrations by **fuel type** in detail[1], petrol car registrations increased by 5% in July, reaching a market share of 28.9%. On the other hand, diesel car registrations decreased by 5.6% compared to the same month in 2022, with a market share of 17.7%. In the first seven months of 2023, the registrations of petrol cars increased by 21.4%, while diesel cars increased by 13.9%, with market shares of 28.2% and 19%, respectively.

In July, alternative fuel cars were the most popular, accounting for over half of the market (53.4%), with a 17.4% increase compared to July 2022. Cumulatively, they grew by 23.6%, with a market share of 52.8%. Out of these, electrified cars made up 43.5% of the market in July and 43.7% cumulatively, up 15.6% for the month and 26% for the seven months.

Regarding non-rechargeable hybrids, their registrations grew by 17.3% in July, making up 35.6% of the market. Cumulatively, they grew by 29.1%, accounting for 35.3% of the market.

[1] Provisional Data

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Registrations of rechargeable cars (BEVs and PHEVs) increased by 8.6% in July, making up 7.9% of the market in the month, the same share as in July 2022. Cumulatively, they grew by 14.8% and had a share of 8.4%, down 0.5 percentage points compared to the first seven months of 2022.

Electric cars comprised 3.4% of the market in July and 3.8% cumulatively, with sales increasing by 14.5% in July and 29.1% cumulatively. Plug-in hybrids rose 4.3% in July and maintained a positive cumulative change (+5.1%). They accounted for 4.4% of the monthly registrations and 4.6% of the year-to-date total.

Gas-powered cars made up 9.9% of new registrations in July, with LPG cars accounting for almost all of them (up 34.6% over the month). A marginal 0.1% was accounted for by CNG cars, which fell by 83.4% over the month. Over the month, CNG cars fell by 86.2%, and LPG cars rose by 25.1%. Since the beginning of the year, the two fuels account for around 9.1% of the market (of which only 0.1% is CNG).

In January-July 2023, the Fiat Panda, Lancia Ypsilon, and Fiat 500 hybrids were the first, second and fifth most popular mild/full hybrids. Among PHEVs, the Jeep Compass was the best-selling model, while the Jeep Renegade ranked fourth and the Alfa Romeo Tonale ranked ninth. Among electric cars, the Fiat 500 was the third best-selling model after the Tesla Model Y and Model 3, while the Peugeot 208 ranked seventh.

Looking at the **market by segment**, in July the market share of small and super-utilities combined was 32.6%, almost similar to last year's figures, with only a slight increase of 0.1%.

The medium segment cars had a market share of 11.4%, a significant increase of 21.3% compared to July 2022.

SUVs had a market share of 53.5% in July, showing a rise of 13.2%. Small SUVs had a market share of 7.1%, a decline of 4.5% compared to last year. Compact SUVs had a market share of 32.8%, an increase of 14.6%. Medium SUVs had a market share of 9.7%, a rise of 18.1%, while the sales of large SUVs accounted for 3.9% of the total, an increase of 30.6%. Stellantis Group brand contributed 25% of the total SUV sales in July.

Small cars and superminis had a market share of 31.3% since the beginning of 2023, an increase of 5.1% compared to the first seven months of 2022. The Fiat Panda remains the best-selling model in this category. The Lancia Ypsilon and Fiat 500 are in third and fourth place, respectively. The Opel Corsa and Citroen C3 follow in fifth and sixth place, with the Peugeot 208 in eighth place.

Medium cars belonging to segments C, D, and E had a market share of 11.6%, a 41.6% increase. In July's top ten, the Stellantis group's Fiat Tipo and Peugeot 308 were ranked fourth and sixth, respectively.

SUVs accounted for 54.8% of cumulative sales, representing a 29.5% increase. The newly launched Jeep Avenger has performed exceptionally well, securing the third position among the top ten small SUVs, with almost 10,000 units registered since April 2023. It is also leading the monthly top ten in its category. The Evo 3 has also performed well among small SUVs, ranking ninth in the cumulative and monthly rankings, while the DR 3.0 stood tenth in its category for July registrations.

The share of MPVs and vans was increasingly marginal, accounting for 1.3% of sales for the month, a 14.8% decrease.

According to the ISTAT survey, the **consumer confidence index** (base 2010=100) decreased in July, going down from 108.6 to 106.7. However, the **composite business confidence index** (Iesi) has increased from 108.2 to 109.1.

Regarding consumer confidence, the index related to the current ability to purchase durable goods, including cars, fell again in July (from -77 to -80) after recovering in June.

According to preliminary estimates by ISTAT, the **national consumer price index** has risen by 0.1% monthly and 6% annually in July (after +6.4% in the previous month). The deceleration in the inflation rate was mainly due to a fall in the trend prices of transport services (from +4.7% to +2.4%), unregulated energy goods (from +8.4% to +7.0%) and, to a lesser extent, processed food (from +11.5% to +10.9%), other goods (from +4.8% to +4.6%), miscellaneous services (from +2.9% to +2.7%) and tobacco (from +2.5% to +1.9%). These effects were only partly offset by price increases for unprocessed food (+9.4% to +10.4%) and dwelling services (+3.5% to +3.6%).

Within non-regulated energy, the most significant declines in the aggregate were recorded for the prices of electricity on the free market (from +18.7% to +11.3%; -5.0% cyclically adjusted), **other fuels** (from -10.2% to -15.4%; -3.5% in June), town gas, and natural gas on the free market (from +28.8% to +28.3%; -5.1% month-on-month) and **transport diesel** (with a more marked fall from -14.4% to -14.7%; +1.2% month-on-month). On the other hand, **petrol** prices decreased less (from -9.6% to -8.8%; +0.9% compared to June).

The **Stellantis Group** recorded 38,528 registrations in July, a decrease of 0.5%, with a market share of 32.3%.

However, the total registrations for the first seven months of 2023 amounted to 319,955 units, showing an increase of 8.9%, with a market share of 33.3%.

In July, six models from the Stellantis Group were among the **top ten**, with the Fiat Panda remaining the most popular, with 8,824 units sold. Lancia Ypsilon was in third place with 3,352 units sold, followed by the Fiat 500X with 2,410 units sold, up one spot from the previous month. The Citroen/DS C3 was in seventh place with 2,333 units sold, and the Jeep Avenger, a newcomer, was in ninth place with 2,053 units sold. The Peugeot 208 was in tenth place with 2,029 units sold.

DR automobiles in the marketplace are on the rise, with DR, EVO, Sportequipe and Icks brands showing an increase of 83.1% in July 2023 and 72.1% cumulatively in 2023. The Molise manufacturer accounted for 2.7% of the market in July and 2.1% over the first seven months of 2023.

In July 2023, the **second-hand market** recorded 498,970 ownership transfers before mini-transfers to dealers, showing a considerable increase of 32.4% from July 2022. In the first seven months of 2023, there were 3,030,355 transfers of ownership, which revealed a rise of 11.6% compared to the same period in 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

ANFIA Associazione Nazionale Filiera Industria Automobilistica

ITALIA - IMMATRICOLAZIONI AUTOVETTURE
ITALY - NEW CAR REGISTRATIONS

dati provvisori/*provisional data*

	LUGLIO *JULY*				VAR. % *% CHG.*	GENNAIO/LUGLIO *JANUARY/JULY*				VAR. % *% CHG.*
MARCA/*MAKE*	**2023**	**%**	**2022**	**%**	***23/22***	**2023**	**%**	**2022**	**%**	***23/22***
STELLANTIS Group*	***38.528***	***32,3***	***38.711***	***35,3***	***-0,5***	***319.955***	***33,3***	***293.780***	***37,0***	***+8,9***
FIAT	14.341	12,0	15.306	14,0	-6,3	108.038	11,2	113.956	14,4	-5,2
PEUGEOT	5.530	4,6	5.258	4,8	+5,2	53.695	5,6	45.764	5,8	+17,3
CITROEN	3.772	3,2	5.120	4,7	-26,3	31.514	3,3	35.178	4,4	-10,4
JEEP	5.466	4,6	4.125	3,8	+32,5	45.417	4,7	32.707	4,1	+38,9
OPEL	2.914	2,4	3.615	3,3	-19,4	29.535	3,1	29.633	3,7	-0,3
LANCIA	3.352	2,8	3.100	2,8	+8,1	27.377	2,8	24.584	3,1	+11,4
ALFA ROMEO	2.264	1,9	1.448	1,3	+56,4	16.875	1,8	7.131	0,9	+136,6
DS	555	0,5	429	0,4	+29,4	4.947	0,5	3.637	0,5	+36,0
MASERATI	334	0,3	310	0,3	+7,7	2.557	0,3	1.190	0,1	+114,9
VW Group	***21.381***	***17,9***	***19.592***	***17,9***	***+9,1***	***162.513***	***16,9***	***129.456***	***16,3***	***+25,5***
VOLKSWAGEN	9.229	7,7	9.651	8,8	-4,4	77.488	8,1	63.552	8,0	+21,9
AUDI	5.932	5,0	4.650	4,2	+27,6	42.353	4,4	30.934	3,9	+36,9
SKODA	2.898	2,4	2.314	2,1	+25,2	20.349	2,1	14.655	1,8	+38,9
SEAT	1.024	0,9	1.366	1,2	-25,0	7.937	0,8	9.289	1,2	-14,6
CUPRA	1.640	1,4	907	0,8	+80,8	9.645	1,0	6.902	0,9	+39,7
PORSCHE	624	0,5	669	0,6	-6,7	4.473	0,5	3.899	0,5	+14,7
LAMBORGHINI	34	0,0	35	0,0	-2,9	268	0,0	225	0,0	+19,1
RENAULT Group	***12.985***	***10,9***	***11.291***	***10,3***	***+15,0***	***101.233***	***10,5***	***77.735***	***9,8***	***+30,2***
DACIA	7.108	6,0	5.156	4,7	+37,9	53.787	5,6	42.588	5,4	+26,3
RENAULT	5.877	4,9	6.135	5,6	-4,2	47.446	4,9	35.147	4,4	+35,0
TOYOTA Group	***4.212***	***3,5***	***8.264***	***7,5***	***-49,0***	***58.490***	***6,1***	***55.034***	***6,9***	***+6,3***
TOYOTA	3.996	3,4	8.122	7,4	-50,8	56.318	5,9	53.089	6,7	+6,1
LEXUS	216	0,2	142	0,1	+52,1	2.172	0,2	1.945	0,2	+11,7
HYUNDAI Group	***7.767***	***6,5***	***7.004***	***6,4***	***+10,9***	***58.365***	***6,1***	***48.965***	***6,2***	***+19,2***
KIA	3.886	3,3	3.443	3,1	+12,9	29.114	3,0	25.082	3,2	+16,1
HYUNDAI	3.881	3,3	3.561	3,2	+9,0	29.251	3,0	23.883	3,0	+22,5
FORD	***5.613***	***4,7***	***5.535***	***5,0***	***+1,4***	***52.593***	***5,5***	***45.951***	***5,8***	***+14,5***
BMW Group	***7.077***	***5,9***	***4.406***	***4,0***	***+60,6***	***48.131***	***5,0***	***37.421***	***4,7***	***+28,6***
BMW	5.161	4,3	3.164	2,9	+63,1	35.781	3,7	28.089	3,5	+27,4
MINI	1.916	1,6	1.242	1,1	+54,3	12.350	1,3	9.332	1,2	+32,3
DAIMLER Group	***4.345***	***3,6***	***4.144***	***3,8***	***+4,9***	***32.681***	***3,4***	***28.801***	***3,6***	***+13,5***
MERCEDES	3.970	3,3	3.833	3,5	+3,6	29.838	3,1	25.872	3,3	+15,3
SMART	375	0,3	311	0,3	+20,6	2.843	0,3	2.929	0,4	-2,9
NISSAN	***2.816***	***2,4***	***1.958***	***1,8***	***+43,8***	***20.645***	***2,1***	***16.011***	***2,0***	***+28,9***
MG	***2.468***	***2,1***	***519***	***0,5***	***+375,5***	***16.694***	***1,7***	***3.175***	***0,4***	***+425,8***
LYNK&CO	***175***	***0,1***	***377***	***0,3***	***-53,6***	***3.160***	***0,3***	***1.858***	***0,2***	***+70,1***
DR	***3.266***	***2,7***	***1.784***	***1,6***	***+83,1***	***19.934***	***2,1***	***11.580***	***1,5***	***+72,1***
SUZUKI	***2.977***	***2,5***	***1.311***	***1,2***	***+127,1***	***21.119***	***2,2***	***12.332***	***1,6***	***+71,3***
VOLVO	***1.475***	***1,2***	***1.287***	***1,2***	***+14,6***	***10.977***	***1,1***	***8.052***	***1,0***	***+36,3***
JAGUAR LAND ROVER Group	***1.123***	***0,9***	***1.016***	***0,9***	***+10,5***	***7.082***	***0,7***	***6.286***	***0,8***	***+12,7***
LAND ROVER	942	0,8	836	0,8	+12,7	5.946	0,6	4.808	0,6	+23,7
JAGUAR	181	0,2	180	0,2	+0,6	1.136	0,1	1.478	0,2	-23,1
MAZDA	***1.316***	***1,1***	***571***	***0,5***	***+130,5***	***9.432***	***1,0***	***5.259***	***0,7***	***+79,3***
HONDA	***481***	***0,4***	***534***	***0,5***	***-9,9***	***3.335***	***0,3***	***4.857***	***0,6***	***-31,3***
TESLA	***478***	***0,4***	***37***	***0,0***	***+1191,9***	***8.996***	***0,9***	***2.588***	***0,3***	***+247,6***
MITSUBISHI	***77***	***0,1***	***394***	***0,4***	***-80,5***	***813***	***0,1***	***1.619***	***0,2***	***-49,8***
SUBARU	***238***	***0,2***	***116***	***0,1***	***+105,2***	***1.703***	***0,2***	***996***	***0,1***	***+71,0***
FERRARI	***61***	***0,1***	***66***	***0,1***	***-7,6***	***455***	***0,0***	***463***	***0,1***	***-1,7***
ALTRE	***348***	***0,3***	***694***	***0,6***	***-49,9***	***2.459***	***0,3***	***1.654***	***0,2***	***+48,7***
TOTALE MERCATO	**119.207**	**100,0**	**109.611**	**100,0**	**+8,8**	**960.765**	**100,0**	**793.873**	**100,0**	**+21,0**

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*

luglio/July

TOP 10

N.	MARCA *Make*	MODELLO *Model*	LUGLIO 2023 *JULY 2023*
1	FIAT	PANDA	8.824
2	DACIA	SANDERO	3.436
3	LANCIA	YPSILON	3.352
4	DACIA	DUSTER	2.893
5	VOLKSWAGEN	T-ROC	2.838
6	FIAT	500X	2.410
7	CITROEN/DS	C3	2.333
8	FORD	PUMA	2.222
9	CHRYSLER7JEEP/DO	AVENGER	2.053
10	PEUGEOT	208	2.029

N.	MARCA *Make*	MODELLO *Model*	GEN/LUG 2023 *JAN/JUL 2023*
1	FIAT	PANDA	58.957
2	DACIA	SANDERO	29.314
3	LANCIA	YPSILON	27.208
4	FIAT	500	22.949
5	VOLKSWAGEN	T-ROC	20.633
6	TOYOTA	YARIS CROSS	20.566
7	JEEP	RENEGADE	20.465
8	FIAT	500X	18.958
9	DACIA	DUSTER	18.747
10	FORD	PUMA	18.362

Fonte: CED - Ministero delle Infrastrutture e della Mobilità sostenibili

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/07/2023

1 Comprende versione Elettrica e marchio Abarth

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