Press Release

**THE ITALIAN CAR MARKET REMAINED STABLE DURING OCTOBER (-0.2%)**

**ANFIA is engaged in ministerial meetings to present the Italian automotive sector's proposals for the Recovery Plan, an opportunity not to be missed to support the sector during this difficult industrial transformation**

*Turin, 2nd November 2020* – According to data published today by the Department of Infrastructure and Transport, the Italian car sector registered 156,978 new cars in October, representing a 0.2% drop compared to the same month in 2019.

As a result, the final figures for the first ten months of 2020 show 1,123,194 registrations, a drop of 30.9% compared to the same period in 2019.

*"In October 2020, after growth in September of 9.5%, the Italian car sector remained relatively stable (-0.2%), accounting for one working day less than in October 2019 (22 days compared to 23)* – explained **Paolo Scudieri, President of ANFIA**.

*We are currently engaged in ministerial meetings to present the Italian automotive industries proposals for the Recovery Plan, an opportunity not to be missed to support our sector in this challenging industrial transformation, working on four key elements necessary to ensure our strategic repositioning and competitive advantage: measures to fund investment in research and development and initial production; fostering smart and mobility sharing projects; initiatives relating to human capital and finally financial support for businesses. We hope that these lines of action will be considered as priorities and given an adequate place in the final plan.*

*Concerning the current economic situation, we believe it would be appropriate to introduce measures to encourage businesses to invest in the renewal of their fleet of light commercial vehicles, to support both the market and, at the same time, meet the needs to improve air quality in urban areas, where delivery services are experiencing a period of growth. The idea is to provide a financial contribution based on the total groundmass of the vehicle, the type of power supply used and the scrapping of vehicles in the same class up to Euro 4/IV".*

Moving on to the analysis regarding **fuel types[1]**, in October, the drop in traditional fuel types continued, while the market for electrified cars continued to show growth.

[1] Provisional data

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

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Diesel vehicles during October fell by 14% and accounted for 30.5% of the market, however during the first ten months of 2020 registrations were 42% lower than in the same period in 2019. This figure represents 34%, almost 7% lower than in the same period in 2019. Petrol vehicles fell by 31% in October and 39% year to date, representing 32% of the market in October and 39% in total for the first ten months of 2020. Alternative fuelled cars doubled in October (+105%) and reached a market share of 38%, compared to 26.8% of the total since the beginning of 2020, representing an 11% increase compared to the same period in 2019, which had a growth of 20%.

LPG cars grew by 7% during the month but fell by 35% year to date, achieving a market share of 6.7%, both in October and in the first ten months of 2020. Methane cars continued to drop in October by 45%, achieving a combined market share of 1.6%. In the first ten months of 2020, the market share has fallen to 17%, with a quota of 2.3%.

By contrast, hybrid and electric vehicles have continued to grow, +233% in October and +93% since the beginning of 2020. Among these, both mild and full hybrids grew by 228% in October, representing a total market share of 25%, while in the first ten months of 2020 they have increased by 82%, showing a 15% quota (it was 6% in the same period of 2019). Rechargeable vehicles sold in October 2020 were 264% higher than in October 2019, thanks mainly to the strong performance of both electric cars (+202% and 1.8% share) and, above all, plug-in hybrids (+334% and 2.3% share). Both electrical and plug-in hybrids accounted for 4% of registrations in the month and 3% since the beginning of the year. In the first ten months of 2020, rechargeable electrical and plug-in hybrids increased by 169% compared to the same period in 2019.

Panda's hybrid version remains, once again in October, the best-selling model among all hybrid cars. The hybrid versions of Lancia Ypsilon and the Fiat 500 also performed well and finished in 3rd and 4th place, respectively. Jeep Compass and Jeep Renegade were both confirmed as the best-selling plug-in hybrid models during October.

Concerning the **market by segment**, registrations of super-utility vehicles grew in October by 5.5% (Fiat Panda and Fiat 500 were confirmed as the best-selling models during the month and accounted for 64%), and small cars by 10% (Lancia Ypsilon still ranked first). Medium-sized cars saw their market grow by 1.5%, with lower-medium vehicles up 2.6% and upper-medium cars down by 4%. SUVs registered a downward trend of 4% (16.5% of all SUV registrations were FCA Group cars) and accounted for 41% of the market in October. The registrations of small SUVs fell by 0.1% (Fiat 500X ranked second and Jeep Renegade ranked third), compact SUV registrations fell by 7.5% (Jeep Compass was the best-selling model during the month), medium-sized SUV by 2.3% (Alfa Romeo Stelvio ranked number one) and large SUV registrations by 17%. There was also a decrease in the number of new registrations of MPVs, which fell by 32.5% during October. Finally, registrations of premium cars fell by 25% and sports cars by 23%, while luxury cars rose by 32%.



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In the first ten months of 2020 there has been a double-digit fall in registrations in all segments.

According to ISTAT, in October 2020 **consumer confidence index** (base 2010=100) is expected to decrease from 103.3 to 102.0, while **business confidence** (Iesi) has increased from 91.3 to 92.9.

Also, concerning consumer confidence regarding durable goods, including vehicles, the current opportunity to buy is stable (-53.2, as in the previous month).

According to preliminary ISTAT estimates, in October, **the national consumer price index** increased by 0.2% monthly and decreased by 0.3% on an annual basis (from -0.6% in September). Negative inflation, for the sixth consecutive month, continued to be driven by lower energy prices (-9.5%).

In the non-regulated energy segment, which fell from -8.2% in September to -9.4%, looking at the trend in fuel prices, **diesel prices** fell from -11.8% to -13.9% in trend terms (-1.1% in economic terms) and **petrol** prices from -10.3% to -11.5% (-0.3% in financial terms).

Overall, **Italian manufacturers** registered 38,680 registrations during the month (+13.5%), with a market share of 24.6% (21.7% in October 2019). Since the beginning of 2020, total registrations have totalled 269,527 units (-31.4%), with a market share of 24%.

FCA makes (including Maserati) totalled 38,086 registrations in the month (+12.5%), with a market share of 24.3% (21.5% in October 2019). There was a positive trend for Fiat (+17.9%) and Jeep (+15.2%) brands. Ferrari (+18.9%) and Lamborghini (+100%) also performed well.

In the first ten months of 2020, FCA makes totalled 266,103 registered cars representing a decrease of 31.6%.

In October, there were five Italian models in the **top ten of sales**, with the Fiat Panda (14,949 units) still holding the first position - also steadily growing since the beginning of the year - followed in second place by Lancia Ypsilon (4,716) and, in fifth place, by Fiat 500 (3,548). In seventh place, we find the Fiat 500X (3,446), which gained three positions and followed in eighth place by the Jeep Renegade (3,369).

In October, the **used car market** recorded a total of 357,958 transfers of ownership before temporary transfers to dealers amounting to 9.8% less than in October



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2019. In the first ten months of 2020, there were 2,446,090 units transferred, down 30.7% compared to January-October 2019.

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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**
5.529 companies
274.000 employees (direct and indirect), more than 7% of the employees in the Italian manufacturing sector
105.9 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*

| | OTTOBRE *OCTOBER* | | | | VAR. % *% CHG.* | GENNAIO/OTTOBRE *JANUARY/OCTOBER* | | | | VAR. % *% CHG.* |
|---|---|---|---|---|---|---|---|---|---|---|
| **MARCA**/*MAKE* | **2020** | *%* | **2019** | *%* | *20/19* | **2020** | *%* | **2019** | *%* | *20/19* |
| FCA | 38.086 | *24,26* | 33.857 | *21,53* | *12,49* | 266.103 | *23,69* | 388.801 | *23,92* | *-31,56* |
| FIAT | 25.360 | *16,16* | 21.519 | *13,68* | *17,85* | 170.338 | *15,17* | 244.840 | *15,06* | *-30,43* |
| ALFA ROMEO | 1.598 | *1,02* | 1.899 | *1,21* | *-15,85* | 13.548 | *1,21* | 21.821 | *1,34* | *-37,91* |
| LANCIA | 4.716 | *3,00* | 4.847 | *3,08* | *-2,70* | 34.078 | *3,03* | 50.510 | *3,11* | *-32,53* |
| JEEP | 6.262 | *3,99* | 5.436 | *3,46* | *15,19* | 47.100 | *4,19* | 69.824 | *4,30* | *-32,54* |
| MASERATI | 150 | *0,10* | 156 | *0,10* | *-3,85* | 1.039 | *0,09* | 1.806 | *0,11* | *-42,47* |
| FERRARI | 44 | *0,03* | 37 | *0,02* | *18,92* | 448 | *0,04* | 460 | *0,03* | *-2,61* |
| DR | 521 | *0,33* | 185 | *0,12* | *181,62* | 2.701 | *0,24* | 3.453 | *0,21* | *-21,78* |
| LAMBORGHINI | 24 | *0,02* | 12 | *0,01* | *100,00* | 244 | *0,02* | 286 | *0,02* | *-14,69* |
| ALTRE NAZIONALI | 5 | *0,00* | 3 | *0,00* | *66,67* | 31 | *0,00* | 36 | *0,00* | *-13,89* |
| **TOT. MARCHE NAZ.** | **38.680** | *24,64* | **34.094** | *21,68* | *13,45* | **269.527** | *24,00* | **393.036** | *24,18* | *-31,42* |
| AUDI | 5.618 | *3,58* | 5.570 | *3,54* | *0,86* | 40.625 | *3,62* | 54.100 | *3,33* | *-24,91* |
| BMW | 5.291 | *3,37* | 5.169 | *3,29* | *2,36* | 37.589 | *3,35* | 48.841 | *3,00* | *-23,04* |
| CITROEN/DS | 8.423 | *5,37* | 7.390 | *4,70* | *13,98* | 56.141 | *5,00* | 78.419 | *4,82* | *-28,41* |
| DACIA | 5.557 | *3,54* | 5.142 | *3,27* | *8,07* | 43.644 | *3,89* | 71.526 | *4,40* | *-38,98* |
| FORD | 10.285 | *6,55* | 10.798 | *6,87* | *-4,75* | 74.468 | *6,63* | 103.190 | *6,35* | *-27,83* |
| HONDA | 1.000 | *0,64* | 738 | *0,47* | *35,50* | 5.752 | *0,51* | 7.348 | *0,45* | *-21,72* |
| HYUNDAI | 4.067 | *2,59* | 5.006 | *3,18* | *-18,76* | 29.020 | *2,58* | 41.541 | *2,56* | *-30,14* |
| JAGUAR | 359 | *0,23* | 783 | *0,50* | *-54,15* | 2.921 | *0,26* | 7.159 | *0,44* | *-59,20* |
| KIA | 4.262 | *2,72* | 4.587 | *2,92* | *-7,09* | 30.721 | *2,74* | 40.328 | *2,48* | *-23,82* |
| LAND ROVER | 1.377 | *0,88* | 1.586 | *1,01* | *-13,18* | 9.774 | *0,87* | 14.227 | *0,88* | *-31,30* |
| MAZDA | 1.307 | *0,83* | 1.403 | *0,89* | *-6,84* | 8.596 | *0,77* | 10.367 | *0,64* | *-17,08* |
| MERCEDES | 5.719 | *3,64* | 5.151 | *3,28* | *11,03* | 38.495 | *3,43* | 51.196 | *3,15* | *-24,81* |
| MINI | 1.883 | *1,20* | 1.985 | *1,26* | *-5,14* | 13.337 | *1,19* | 18.260 | *1,12* | *-26,96* |
| MITSUBISHI | 399 | *0,25* | 686 | *0,44* | *-41,84* | 3.604 | *0,32* | 6.692 | *0,41* | *-46,14* |
| NISSAN | 3.469 | *2,21* | 3.816 | *2,43* | *-9,09* | 22.896 | *2,04* | 37.473 | *2,31* | *-38,90* |
| OPEL | 6.136 | *3,91* | 5.930 | *3,77* | *3,47* | 45.463 | *4,05* | 87.701 | *5,40* | *-48,16* |
| PEUGEOT | 8.648 | *5,51* | 9.780 | *6,22* | *-11,57* | 65.790 | *5,86* | 94.420 | *5,81* | *-30,32* |
| PORSCHE | 630 | *0,40* | 770 | *0,49* | *-18,18* | 4.767 | *0,42* | 5.699 | *0,35* | *-16,35* |
| RENAULT | 9.124 | *5,81* | 8.378 | *5,33* | *8,90* | 67.914 | *6,05* | 95.791 | *5,89* | *-29,10* |
| SEAT | 2.339 | *1,49* | 2.166 | *1,38* | *7,99* | 17.582 | *1,57* | 22.654 | *1,39* | *-22,39* |
| SKODA | 2.733 | *1,74* | 2.046 | *1,30* | *33,58* | 20.627 | *1,84* | 22.741 | *1,40* | *-9,30* |
| SMART | 682 | *0,43* | 2.164 | *1,38* | *-68,48* | 3.319 | *0,30* | 22.117 | *1,36* | *-84,99* |
| SSANGYONG | 109 | *0,07* | 172 | *0,11* | *-36,63* | 998 | *0,09* | 2.050 | *0,13* | *-51,32* |
| SUBARU | 279 | *0,18* | 225 | *0,14* | *24,00* | 1.670 | *0,15* | 2.093 | *0,13* | *-20,21* |
| SUZUKI | 4.951 | *3,15* | 3.550 | *2,26* | *39,46* | 27.388 | *2,44* | 31.790 | *1,96* | *-13,85* |
| TESLA | 64 | *0,04* | 67 | *0,04* | *-4,48* | 2.618 | *0,23* | 1.950 | *0,12* | *34,26* |
| TOYOTA | 8.294 | *5,28* | 8.549 | *5,44* | *-2,98* | 55.366 | *4,93* | 76.945 | *4,73* | *-28,04* |
| LEXUS | 440 | *0,28* | 402 | *0,26* | *9,45* | 3.331 | *0,30* | 4.706 | *0,29* | *-29,22* |
| VOLKSWAGEN | 12.737 | *8,11* | 16.927 | *10,76* | *-24,75* | 103.642 | *9,23* | 151.878 | *9,34* | *-31,76* |
| VOLVO | 1.892 | *1,21* | 2.114 | *1,34* | *-10,50* | 13.889 | *1,24* | 17.537 | *1,08* | *-20,80* |
| ALTRE | 224 | *0,14* | 118 | *0,08* | *89,83* | 1.720 | *0,15* | 1.725 | *0,11* | *-0,29* |
| **TOT.MARCHE EST.** | **118.298** | *75,36* | **123.168** | *78,32* | *-3,95* | **853.667** | *76,00* | **1.232.464** | *75,82* | *-30,73* |
| **TOT.MERCATO** | **156.978** | *100,00* | **157.262** | *100,00* | *-0,18* | **1.123.194** | *100,00* | **1.625.500** | *100,00* | *-30,90* |

Elaborazioni ANFIA su dati del Ministero dei Trasporti/*Prepared by Anfia from the data of Ministry of Transportations (Aut. Min. D07161/H4)*

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/10/2020

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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* | OTTOBRE 2020 *OCTOBER 2020* |
|---|---|---|---|
| 1 | FIAT | PANDA | 14.949 |
| 2 | LANCIA | YPSILON | 4.716 |
| 3 | CITROEN | C3 | 4.644 |
| 4 | TOYOTA | YARIS | 4.246 |
| 5 | FIAT | 500 | 3.548 |
| 6 | RENAULT | CAPTUR | 3.535 |
| 7 | FIAT | 500X | 3.446 |
| 8 | JEEP | RENEGADE | 3.369 |
| 9 | OPEL | CORSA | 3.277 |
| 10 | FORD | PUMA | 3.094 |

| N. | MARCA *Make* | MODELLO *Model* | GEN/OTT 2020 *JAN/OCT 2020* |
|---|---|---|---|
| 1 | FIAT | PANDA | 90.032 |
| 2 | LANCIA | YPSILON | 34.080 |
| 3 | RENAULT | CLIO | 26.342 |
| 4 | FIAT | 500X | 25.628 |
| 5 | FIAT | 500[2] | 24.908 |
| 6 | JEEP | RENEGADE | 24.666 |
| 7 | CITROEN | C3 | 22.594 |
| 8 | DACIA | SANDERO | 21.198 |
| 9 | OPEL | CORSA | 20.718 |
| 10 | RENAULT | CAPTUR | 20.698 |

Fonte: CED - Ministero dei Trasporti

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/10/2020
[2] Comprende la versione Abarth

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