

Italian Automotive Industry: Key Trends, Challenges, and the Road to Zero Emissions

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11 December 2025



Summary

-  ANFIA and the Italian Automotive Supply Chain
-  Italian Automotive Industry and Market
-  The Electric Transition
-  The Italian Supply Chain reaction

Who we are



Components

Motor Vehicles

Car Design & Engineering

470 associate members - 3 product groups

ANFIA represents the interests of its associate members towards public and private, national and international institutions

ANFIA provides for studying and resolving all technical, economic, fiscal, legal, statistical and quality-related issues referred to the automotive sector

110 years of history

Vision

Creating value for the automotive and mobility world

Main activities

- Institutional Relations
- Regulatory Affairs and Technical Legislation
- Studies and Statistics
- Business, Financial and Legal Issues
- Internationalization and Trade
- Events
- Consulting and Training



Who we represent: the Italian automotive sector in figures

Automotive Industry¹

(manufacturing and production)



5,451
Companies



273,000
Production
employees



113.3 Bn€
Turnover
9% of
manufacturing
sector
5.8% of GDP



The industrial
sector with **the**
highest value
added multiplier

Automotive Sector¹

(manufacturing and production + service industry)



1.02 million
employees

20.5 Bn€
wages



380.1 Bn€
Turnover
19.5% of GDP

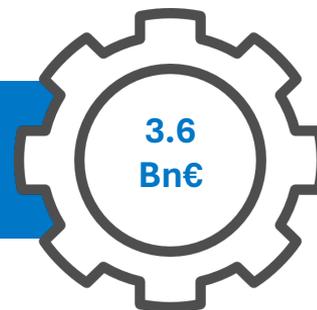


71 Bn€
2022 Fiscal burden

- ✓ **55.3 Bn€ Use**
- ✓ **8.6 Bn€ Purchase**
- ✓ **7.2 Bn€ Ownership**

Components Sector²: 2,134 companies
168 k employees
55.5 Bn€ turnover

H1 2025
Trade
Balance



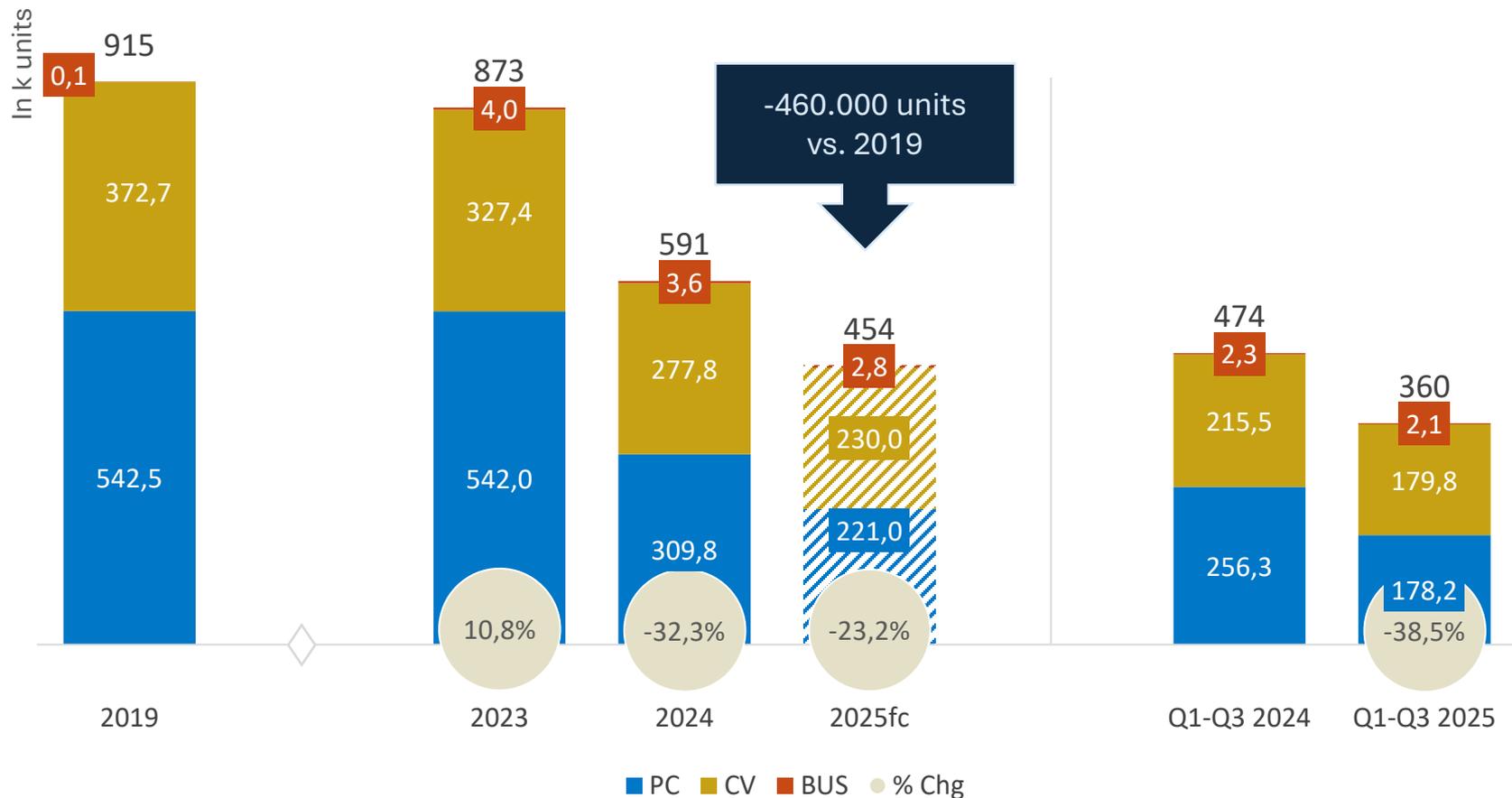
3.6
Bn€

¹ Source: ISTAT data update 2022

² Source: Osservatorio della Componentistica automotive italiana e servizi per la mobilità - 2025 Ed.

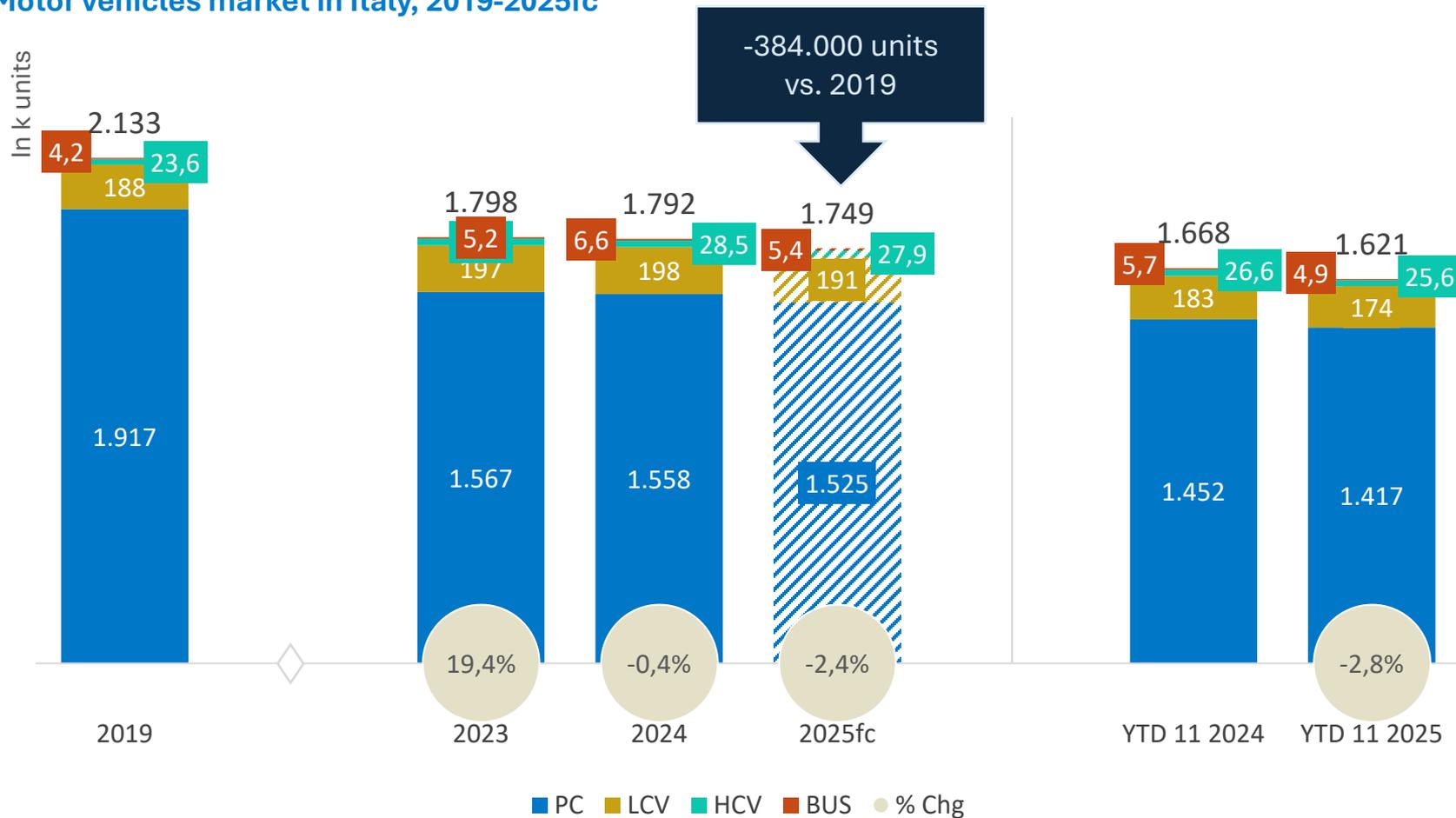
A unique and complete supply chain: from concept to car

Motor vehicles production in Italy, 2019-2025fc



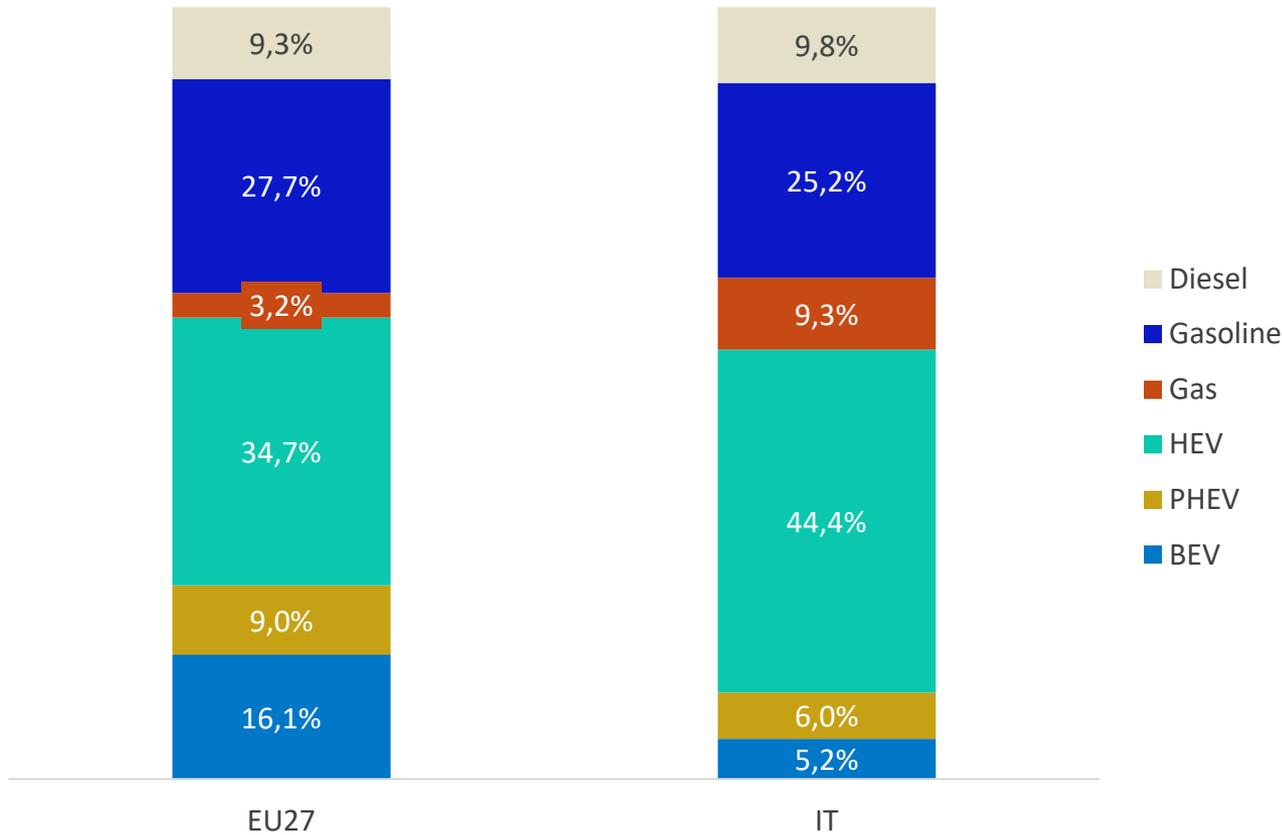
Source: Italian OEMs, 2025fc ANFIA

Motor vehicles market in Italy, 2019-2025fc



Source: ANFIA BI - Ministry of Infrastructures and Transport (Aut.Min. D07161/H4), 2025fc ANFIA

EU27 vs. Italy Passenger Car Market by Fuel Type – YTD 9 2025



Diesel MS is still higher than the EU average, but stable at ~10%

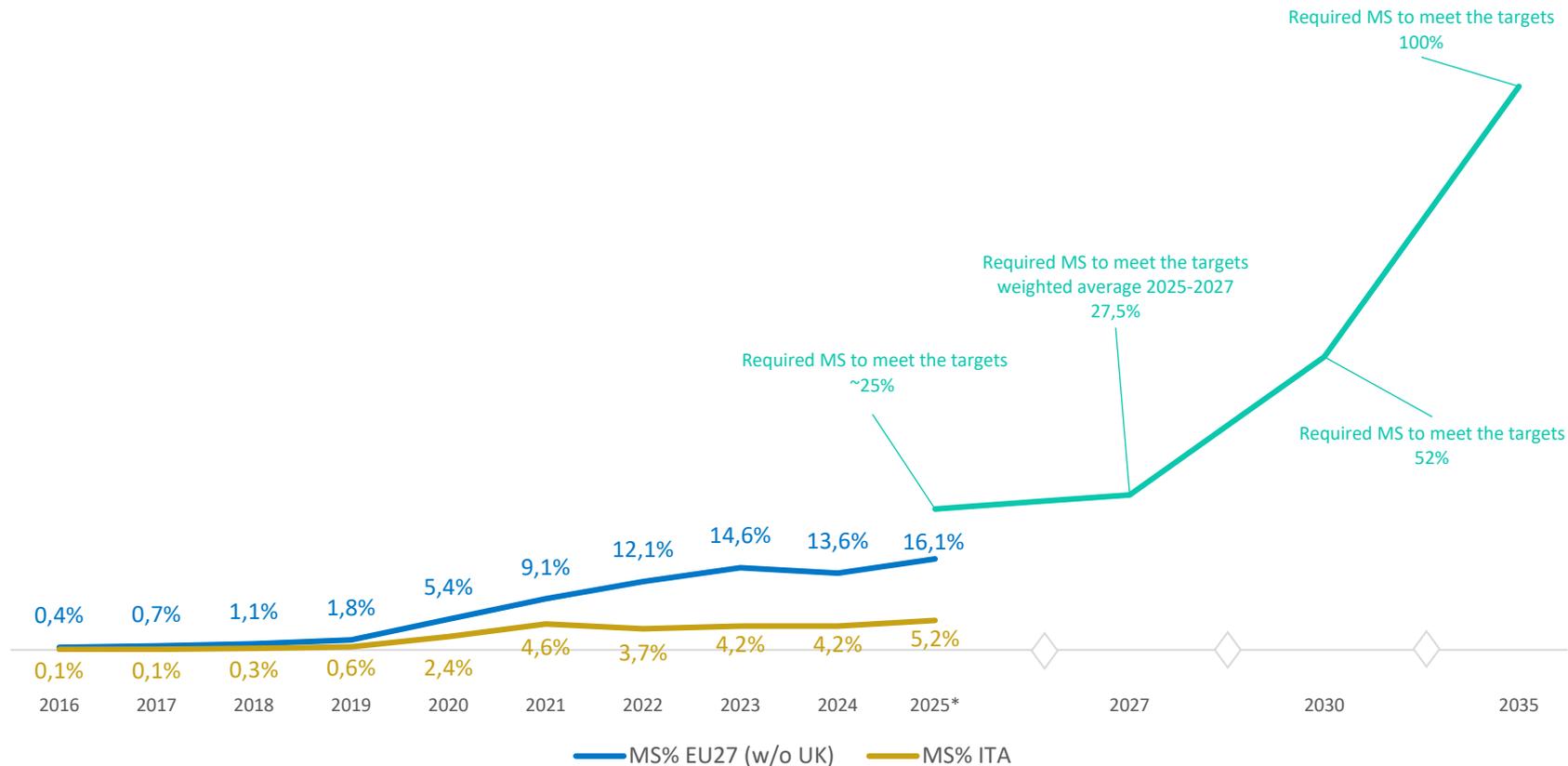
Gasoline MS is rapidly declining amid the various HEV models launched on the market in the last decade

Italy is first in Europe for GPL vehicles registrations

Compared to the other major markets, HEV vehicles are stronger in Italy (third for registrations in 2025 after Germany and France)

Italy has one of the lowest MS for BEV in Europe

EU27 vs. Italy BEV Market trend from 2016, towards 2035



*YTD 9 2025

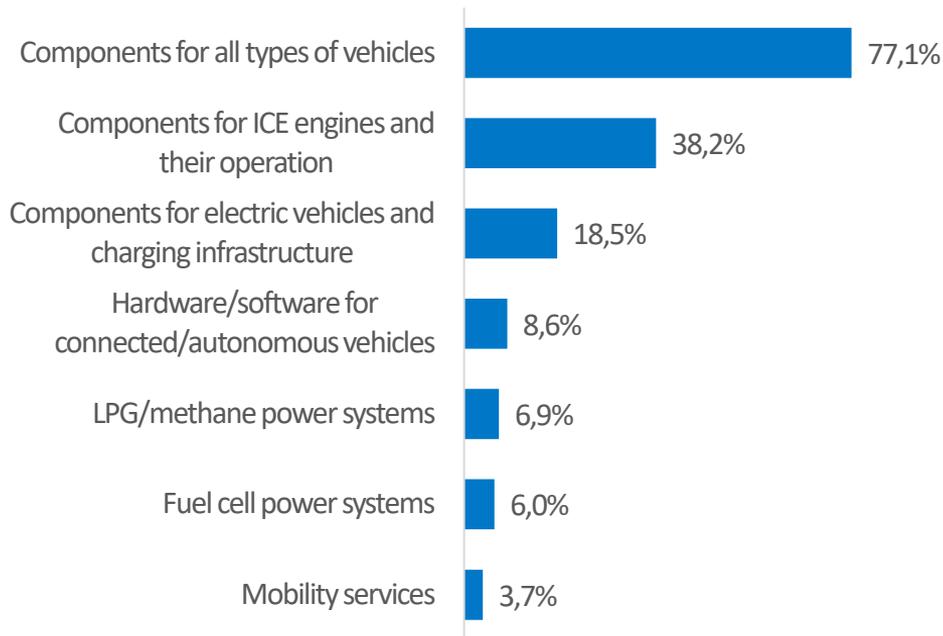
Source: ANFIA BI - Ministry of Infrastructures and Transport (Aut.Min. D07161/H4), ACEA

The electric transition: a jigsaw still incomplete



- Weak market
 - Chinese competitors
- Batteries
 - Costs of energy
- Infrastructures
 - Local content
- Measures to support R&D
 - Preserve competitiveness
- Rapidly evolving technology

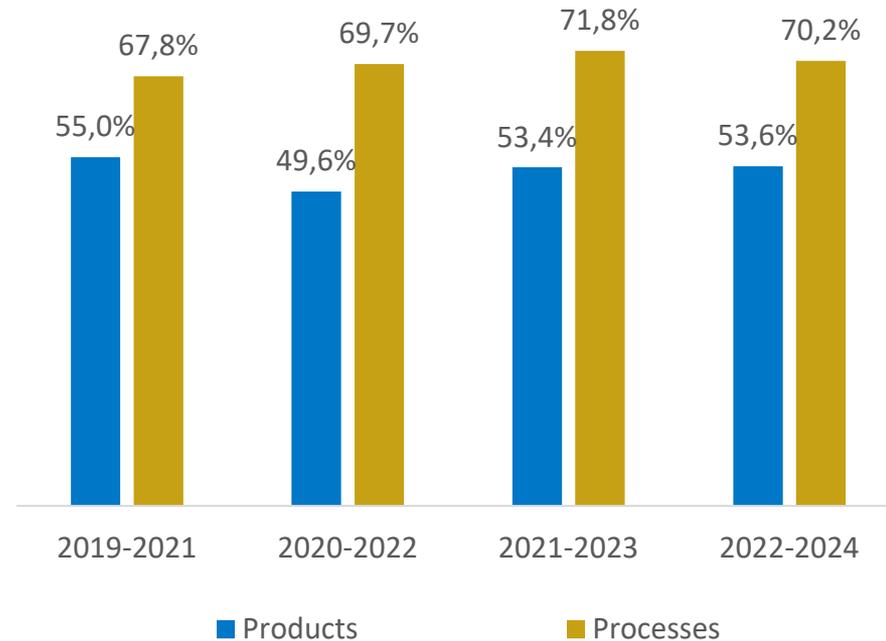
TECHNOLOGICAL AREAS OF ACTIVITY (% OF COMPANIES; MULTIPLE RESPONSES)



- Strong focus on the production of components for **all types of vehicles**, regardless of fuel type
- Still a significant presence in the **internal combustion engine** supply chain
- **Electric mobility and charging infrastructure** and digital technologies for **connected and autonomous vehicles** are growing
- Four out of five companies are positioned in the **petrol and diesel engine vehicle** market, with 64% having a **medium-high degree** of positioning
- 29% have a strong position in the **electric and hybrid vehicle market**

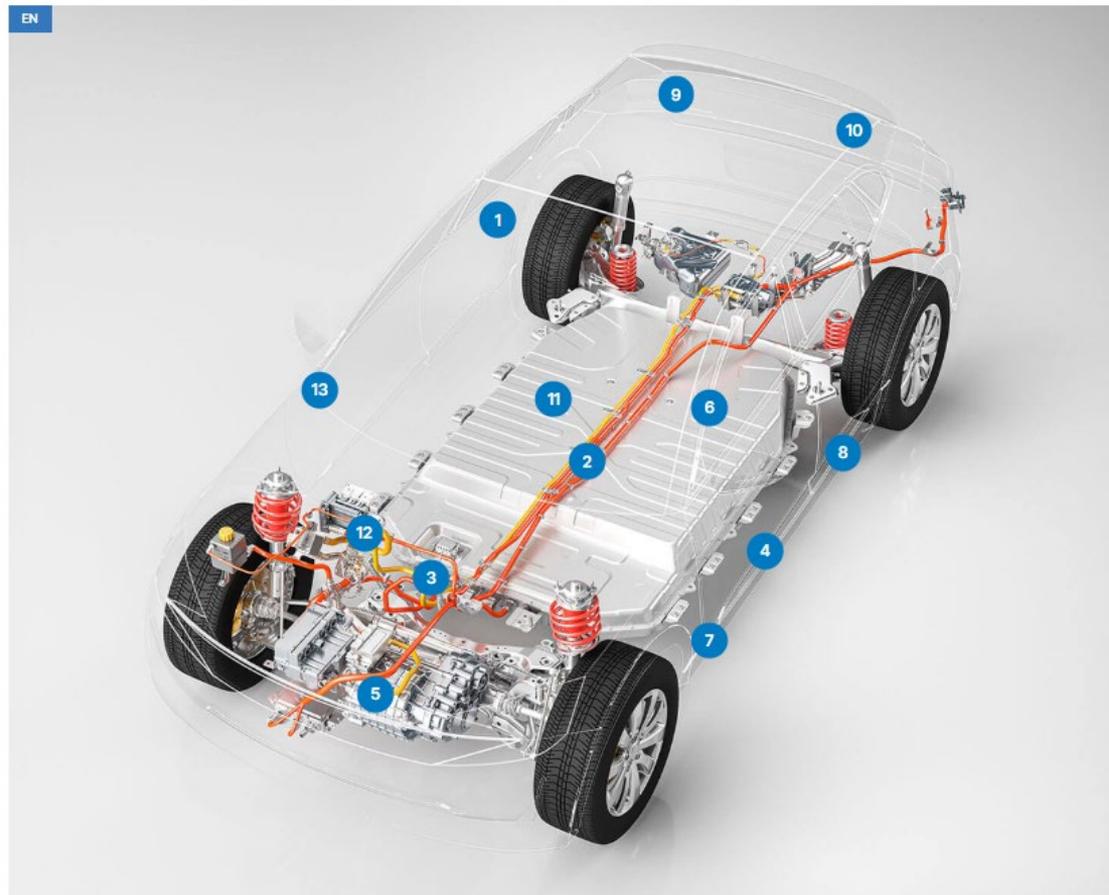
- In 2024, there was a **slight decline** in the proportion of companies that directed **investments** (64%) and **employed staff in R&D activities** (66%)
- The number of companies that **filed patents** (19%) consolidated
- Innovation is mainly carried out **in-house**, and **collaborations with other companies** mainly concern process innovations
- Collaborations with other **institutions** (e.g. universities) are still residual
- In the next three years 2025-2027, 24% of companies plan to **introduce brand new products**, while 30% plan to introduce products that are significantly renewed in terms of design and technological content, both percentages being down

SHARE OF COMPANIES THAT INNOVATED



BEV parts production in Italy

- 1 ADAS
- 2 WIRING
- 3 ELECTRIC/ELECTRONIC PARTS
- 4 TESTING
- 5 E-MOTOR
- 6 BATTERY PACK & MANAGEMENT
- 7 CHASSIS
- 8 DESIGN
- 9 ENGINEERING
- 10 CERTIFICATION
- 11 COOLING SYSTEM
- 12 COOLING SYSTEM HVAC
- 13 SOFTWARE



THANK YOU!

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