



## Press Release

### **THE YEAR CLOSES WITH A POSITIVE SIGN FOR THE TRUCKS (+4.5%), HEAVY TRAILERS AND SEMI TRAILERS (+9%) AND BUSES (+20.3%) MARKETS, EVEN IF DECEMBER UNDERLINES A SLOWDOWN FOR ALL OF THEM**

**The extension of the super-depreciation and of the new Sabatini for 2018 should keep to support the market for the current year**

*Turin, January 16<sup>th</sup> 2018* - During December 2017, have been registered **2,784 new trucks** (-13.5% respect to December 2016) and **1,340 new heavy trailers and semitrailers**, with GVW over 3,500 kg (-23.5%), divided in 156 trailers (-37.1%) and 1,184 semitrailers (-21.3%).

Trucks and trailers and semitrailers markets close 2017 positively, even if it registers a slowdown in the second part of the year.

For both of them during the whole 2017 have been seen a positive trend with **24,373 new trucks**, the 4.5% more respect to 2016, and **16,142 new heavy trailers and semitrailers** (+9% respect to 2016), divided this way: 1,577 trailers (+14.1%) and 14,565 semitrailers (+8.5%).

The **24,400 vehicle transportation certificates** of new trucks released by the Ministry of Infrastructure and Transport during 2017 have been divided this way: 12,200 in the first six months (+21%) and 12,100 in the second part of the year (-8.3%). The average of the month in the first six months of 2017 has been of 2,042, against the average of the month from January to June 2016 of 1,684, while in the second part of 2017 the average of the month has been 2,020, against of 2,203 of the same period of 2016.

Registrations calculated based on the plates release could be available as soon as their own certificates will be included in the archive of vehicles in three months. In fact, according to ANFIA, the certificate for each plate belong to the vehicles sold every month is available in three months and this happen in the 20% of cases.

Looking at the market following the release date of the plate in the first nine months, the trend registered is the same: a good beginning in the first part of the year (+11%) and a slowdown in the second part (from July to September 2017 the slow down on the same period of 2016 is about 5%).

Going on with the analysis for each category of trucks, based on the certificates included in the Vehicles National Archive, arises how the market is fairly divided between cruisers, (in decrease respect to 2016) and trucks for semitrailers (in increasement). For the macro classes in terms of weight, medium trucks (from 3,501 to 15,999 kg) are the 20% of the market (-9% certificates released in one year), while the heavy trucks represent the 80% of the market (+8% certificates released in one year).

Regarding the geographic division, a quarter of the certificates have been released in the South of Italy the 17% in the Centre and the 57% in the North of the country.

According to ANFIA, **7,500 first registrations in Italy of vehicles with already a plate**, have been registered, especially coming from Germany (40%) and over 1,000 trucks comes from the new members countries of the European Union. **The 61% of the vehicles with plates coming**

National Association of Automotive Industry (ANFIA)

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from abroad and registered for the first time in Italy regarding trucks Euro V, the 7% Euro IV, and the 12% Euro III. An important volume arises and regards Euro VI, over 900 trucks (almost triplicated respect to 2016), which have been registered in 2014 and 2015 and coming from Germany.

In 2017 the trailers segment represents the 10% of the market which is lead by the National manufacturers with the 86% of new registrations.

The semitrailers segment represents the 90% of the market and National manufacturers represent the 35% of the market.

Regarding the geographic division, the 30% of the certificates have been released in the South of Italy, the 15% in the Centre and the 55% in the North of the country.

According to ANFIA, are 2,000 the first registrations of vehicles in Italy with already a plate, especially coming from France and Germany.

In the detail, the following:

### Goods transport sector

Trucks with GVW > 3500 kg  
according to weight classes

	December 2017	December 2016	% change	Jan-Dec 2017	Jan-Dec 2016	% change
Medium trucks >3500<16000 kg	494	710	-30,4	4.739	5.216	-9,1
Heavy trucks >=16000 kg	2.290	2.507	-8,7	19.634	18.105	8,4
<b>Total trucks with GVW&gt;3500 kg</b>	<b>2.784</b>	<b>3.217</b>	<b>-13,5</b>	<b>24.373</b>	<b>23.321</b>	<b>4,5</b>

	December 2017	December 2016	% change	Jan-Dec 2017	Jan-Dec 2016	% change
according to type						
Rigid trucks	1.382	1.895	-27,1	11.718	12.073	-2,9
Road tractors	1.402	1.322	6,1	12.655	11.248	12,5
<b>Total trucks with GVW&gt;3500 kg</b>	<b>2.784</b>	<b>3.217</b>	<b>-13,5</b>	<b>24.373</b>	<b>23.321</b>	<b>4,5</b>

Trailers & Semitrailers with GVW>3500 kg

	December 2017	December 2016	% change	Jan-Dec 2017	Jan-Dec 2016	% change
according to type						
Trailers	156	248	-37,1	1.577	1.382	14,1
Semitrailers	1.184	1.504	-21,3	14.565	13.425	8,5
<b>Total T&amp;S with GVW&gt;3500 kg</b>	<b>1.340</b>	<b>1.752</b>	<b>-23,5</b>	<b>16.142</b>	<b>14.807</b>	<b>9,0</b>

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According to the actions for the support of the market, have extended for one year by the National Budget Law of 2018 both the super depreciation for the purchase of the vehicles for the goods transport (with a reduction of 130% respect to the past years, which was 140%), and the new Sabatini for the purchase of goods by PMI. ANFIA hopes that also the fund for the investments could confirm in 2018 the important assignment in terms of human resources of last year, which was about 35M€.

## Passenger transport sector

Buses with GVW>3500 kg

according to type	December 2017	December 2016	% change	Jan-Dec 2017	Jan-Dec 2016	% change
Specific urban buses	77	61	26,2	564	407	38,6
Specific interurban buses	56	50	12,0	680	365	86,3
Specific tourist buses	32	52	-38,5	787	793	-0,8
Midibuses	19	17	11,8	206	125	64,8
Minibuses	57	63	-9,5	630	623	1,1
School buses	39	60	-35,0	490	478	2,5
<b>Total buses with GVW &gt;3500 kg</b>	<b>280</b>	<b>303</b>	<b>-7,6</b>	<b>3.357</b>	<b>2.791</b>	<b>20,3</b>

**Buses** market's with GVW over 3.500 kg registers, during December, 280 new units (-7,6%). Urban buses are positive instead (+26,2%), just like inter-urban buses (+12%) and midibuses (+11,8%) , while a slight slowdown is registered by the other fields: tourist (-38,5%), minibuses (-9,5%) and school buses (-35%).

In 2017, have been released 3,357 certificates against the 2,791 released in the same period of 2016 (+20.3%). All fields, with the only exception of tourist buses (-0.8%), close with a positive sign in the period from January to December and the best performances belong to specific inter-urban buses (+86,3%) and midibuses (+64,8%).

**Buses** market's is in slow down since the end of October 2017. It has to be said that the number of certificates released from October to December 2016 was pretty high, just like the one of the first three months of 2017. The market of buses is focused on the renewal of the fleet for public transportation (urban and inter-urban) and also on the renewal or the upgrade of the fleet for tourist transportation. The market is made of specific buses and mini buses coming from commercial vehicles, which can also transport local buses, or school buses. The market of 2017, has been lead, in particular, by urban and inter-urban buses, especially thanks to the purchase of Lazio, Lombardy, Emilia Romagna, Piedmont and Liguria.

It is confirmed the presence of buses already with a plate coming from abroad (755 certificates in 2017), especially from Germany, registered for the first time in Italy. The data given by ANFIA says these vehicles have already their plate and regarding especially buses Euro 5 and 3. It is worrisome that the 30% of these buses is over 10 years old (registered up to 2007); they are, mainly from German brands.

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The presence of these vehicles in the Italian market, a part of them *no high-performing* since their year of registration, it could be given by a scarce attention by who bought them but also by the environmental matter and by the safety of drivers and passengers.

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ANFIA - Italian Association of the Automotive Industry - is one of the leading Italian Trade Associations, members of CONFINDUSTRIA.

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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