Press Release

2018 HAS BEEN POSITIVE FOR THE TRUCKS MARKET (+5.1%) AND FOR THE BUSES ONE (+36.7%), WHILE THE TOWED VEHICLES REGISTER A SLOWDOWN OF 1.9%

The alternative powered trucks double their yearly volumes (+105% with a market share of 4.5%), but what is alarming is the shortage and the lack of homogeneity of the infrastructural network in Europe, on the eve of the final decision about the reduction of CO_2 targets

Turin, January 18th 2019 – During December 2018, have been released **2,263** certificates of **new trucks** (-18.1% respect to December 2017) and **1,288** certificates of **new heavy trailers and semitrailers**, with GVW over 3,500 kg (-2.9%), divided 86 trailers (-44,5%) and 1,202 semitrailers (+2.6%).

Trucks confirm the positive trend in 2018: 25,582 certificates**,** the 5.1% more than 2017. Negative sign, instead, for the towed vehicles during the past year: 15,803 certificates of new **heavy trailers and semitrailers**, the 1.9% less than the period from January to December 2017, divided this way: 1,443 trailers (-8.2%) and 14,360 semitrailers (-1.2%).

In the trucks market, for the weight classes of 2018, it is showed how medium-heavy vehicles registered a positive trend from January to August, with a slowdown during September, (-5.4%), an increase during October (+10.3%) and a new stop during November (-10.2%) and December (-18.1%). Trucks with GVW over 16,000 kg, with 20,600 units, close the year with a trend of growth of 5%.

The sales of rigid trucks show an increase of 8% during 2018 and the ones of the road tractors show a growth of 2%. Trucks for the road works grow of 18% instead (1,600 units).

About fuels, during 2018 the alternative powered trucks volumes double (+105%), that with 1,157 units, reached a market share of 4.5% (it was 2.3% in 2017), thanks to 1,016 natural gas powered trucks. Among these last ones, a good trend on the market has been showed by GNL vehicles (699 units, +131%), belonging exclusively to Iveco.

Iveco leads the trucks markets with 36% of the overall of sales, followed, respectively, by: Scania, Volvo, Mercedes and DAF.

Looking at the trucks market following their geographical areas, the 57% of sales is represented by the North of Italy, with on top Lombardy (18% of market share), followed by Veneto (11%) and Emilia Romagna (10%); the region Campania is located at the fourth place with a market share of 9.4%.

National Association of Automotive Industry (ANFIA)

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Talking about the market of heavy trailers and semitrailers, during 2018 have been released 303 certificates less respect 2017. Since May, this sector show a slowdown in the monthly volumes. This slowdown has been determined especially because of a contraction among the regions of the center of Italy (-12.7%), which means there have been 299 less vehicles sold. The only area with an increase of volumes is the North West (+1.3%). The contraction of the sales regards especially the international brands (-2.6%), which are the 60% of the market. The 9% of the towed vehicles sold was about trailers.

One of biggest challenges of the industrial vehicles sector in this especially period is the definition of the European targets of the CO_2 reduction, which will be applied for the first time also to this sector. About this, it is scheduled for the next week a final meeting for the definition of the new regulation. ANFIA, which is in the negotiation among the different positions, - non only for the increasement – for the 2030 targets, are involved prices for electric buses, and the decrease of penalties, which are out of proportion respect to the other sectors, considering also the industrial vehicles sector is among the most efficient and innovative.

The reaching of the ambitious target of the CO_2 reduction it will possible only thanks to a quickly spread on the market of trucks with zero emissions. It will necessary keeps going on with an homogeneous development in the whole Europe of the alternative power infrastructures, especially for the recharge network of CNG and LNG industrial and for high voltage recharge points for the electric trucks in a long-range.

In details:

Goods transport sector

Trucks with GVW >3500 kg

according to weight classes

	December 2018	December 2017	var.%	Jan-Dec 2018	Jan-Dec 2017	var.%
Medium trucks >3500<16000 kg	507	490	3,5	4.988	4.733	5,4
Heavy trucks >=16000 kg	1.756	2.274	-22,8	20.594	19.614	5,0
Total trucks with GVW >3500 kg	**2.263**	**2.764**	**-18,1**	**25.582**	**24.347**	**5,1**

According to the type

Rigid trucks	1.185	1.372	-13,6	12.634	11.703	8,0
Road tractors	1.078	1.392	-22,6	12.948	12.644	2,4
Total trucks with GVW >3500 kg	**2.263**	**2.764**	**-18,1**	**25.582**	**24.347**	**5,1**

Trailers and Semitrailers with GVW >3500 kg

According to the type	December 2018	December 2017	var.%	Jan-Dec 2018	Jan-Dec 2017	var.%
Trailers	86	155	-44,5	1.443	1.572	-8,2
Semitrailers	1.202	1.172	2,6	14.360	14.534	-1,2
Total R & S with GVW >3500 kg	**1.288**	**1.327**	**-2,9**	**15.803**	**16.106**	**-1,9**

The **autobus** market, with GVW over 3,500 kg, during December registers 293 new units, with an increasement of 5%. During the month, it is also registered a growth for TPL buses (+7.5%) and for tourist buses and midibuses (+64.9%), while are in slowdown minibuses (-28.6%) and schoolbuses (-12.8%).

During 2018, have been released 4,584 buses certificates against the 3,353 of 2017 (+36.7%). All the sectors got a positive sign, with the only exception of minibuses, in decrease (-3.2%): +85.3% for TPL buses, +4.3% for tourist buses and midibuses, and +9.4% for schoolbuses respect to 2017.

During 2018, the 29% of buses has been sold in the South of Italy and in the islands and only the regions of the Center with the 21% of the market, show a decrease of volumes, (-4.8%). The 55% of the certificates released regarded the urban and interurban buses, the 20% for tourist buses, the 13% for minibuses and the 12% for schoolbuses. The urban buses, Urban buses, which had during 2017 a share of 19%, in 2018 got the 32% of the market. Iveco leads the market, followed by Evobus and by Industria Italiana Autobus.

Passengers transport sector

Buses with GVW >3500 kg

According to the type	December 2018	December 2017	var.%	Jan-Dec 2018	Jan-Dec 2017	var.%
Urban buses/midibuses	115	79	45,6	1.485	632	135,0
Inter urban buses/midibuses	43	68	-36,8	1.053	738	42,7
total TPL buses	**158**	**147**	**7,5**	**2.538**	**1.370**	**85,3**
Tourist buses/midibuses	61	37	64,9	903	866	4,3
Total specific buses	**219**	**184**	**19,0**	**3.441**	**2.236**	**53,9**
minibuses	40	56	-28,6	609	629	-3,2
schoolbuses	34	39	-12,8	534	488	9,4
Total buses with GVW >3500 kg	**293**	**279**	**5,0**	**4.584**	**3.353**	**36,7**

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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.