Press release

ANOTHER SLOWDOWN, IN NOVEMBER, FOR TRUCKS DEMAND (-9.3%), WHILE TOWED VEHICLES ARE STABLE ON THE LEVELS OF LAST YEAR (+0.3%) AND BUSES ARE IN A STRONG SLOWDOWN (-31.8%). ALL THE THREE SECTORS CLOSE WITH A NEGATIVE SIGN THE 2019 PROGRESSIVE

For 2020, ANFIA hopes that, thanks to new resources aim to the renewal of the fleet of towed and industrial vehicles, the trend could be inverted, supporting the share of the alternative tractions and of inter mobility, in line with the objectives of the Green New Deal announced by Government

Turin, December 18th 2019 – In November 2019, have been released **1,794** certificates of **new trucks** (-9.3% respect to November 2019) and **1,143** certificates of new **heavy trailers and semitrailers**, with GVW over 3,500 kg (+0.3%), divided this way 100 trailers (+4.2%) and 1,043 semitrailers (-0.1%).

Both sectors confirm the negative trend of the first eleven months of 2019: 21,654 certificates of **new truck**, the 7.1% less than the period from January to November 2018, and 13,447 certificates of new **heavy trailers and semitrailers** (-7.2% respect to the period January to November 2018), divided this way: 1,277 trailers (-5.8%) and 12,170 semitrailers (-7.2%).

These market slowdown arise in a background where the fleet is slowly renewal, both in Italy and in Europe. According to the 2019 of ACEA[1] about the European fleet from 2014 to 2018, on the EU roads circulating about 6.6 milions of trucks. With over 1.1 milions of trucks, Poland has the largest fleet, followed by Germany (946,541) and Italy (904,308). **The average age of the EU trucks is about 12.4 years and it grew respect to 2013, when it was about 11.7 years.** Among the five main markets, **Spain has the eldest fleet (14.4 years), followed by Italy (14 years).**

Regarding fuels, the Report underlines how in 2018 the 98.3% of all EU trucks are diesel, while petrol ones are only the 1%. Recharging vehicles represent a unimportant share (0.01%, which means 1 every 10,000 vehicles), while the 0.4% of all trucks in the EU is powered by natural gas.

About fuels, it keeps growing the network of LNG stations in Italy, with the opening, last November 26th, of the new refueling point of Lastra a Signa (Florence), which is 59th LNG liquified methane filling station opened.

[1] This data includes all the 25 EU countries (are missing Malta, Cyprus and Bulgaria data), 2 EFTA countries (Iceland is missing) and Turkey and Russia.

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Two more LNG stations will be opened and they are addressed to refuel heavy transportations, on A2 of the Mediterranean road, in the stations of West Cosenza, in the direction of Reggio Calabria, and of East Rosarno, in direction of Salerno. A third station, in the station of East Cosenza, will refuel only CNG for light vehicles. The new stations will be opened in 2021 and will contribute to expand the methane offering in Calabria, where there are 13 CNG stations opened for 38.000 vehicles on road, and it will bring for the first time the liquified methane in the region[2].

At national level, in terms of infrastructural development for 2020, is scheduled the opening of 41 LNG refueling station in total.

For 2020, we hope, thanks to the new resources for the renewal of the industrial and towed vehicles fleet, this trend could be inverted, after the critical aspects arose from the **Investments Law 2019/2020,** where the method used for these incentives forbid to give an ongoing support to the market, since the depletion in few days of the available ceiling.

For the new year, which is upcoming, the Investment Law, definitely approved yesterday, underlines that almost 13 bilions of Euro will be invested for the renewal of the industrial vehicles fleet, both alternative powered and diesel euro VI standards. In the 2020 Budget Law, there are also, more resources for the renewal of the fleet for the goods transportation on behalf of third parties for 2020-2022. Both these actions will be in line with the Green New Deal which has been announced by Government, only if applied favoring companies investments for alternative powered transportation for the intermodals combinations.

[2] Federmetano Data.

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In details:

Goods transport sector

Trucks with GVW >3500 kg

according to weight classes

	November 2019	November 2018	var.%	Jan-Nov 2019	Jan-Nov 2018	var.%
Medium trucks >3500<16000 kg	360	402	-10,4	4.236	4.481	-5,5
Heavy trucks >=16000 kg	1.491	1.704	-12,5	15.990	17.252	-7,3
Total trucks with GVW >3500 kg	**1.794**	**1.977**	**-9,3**	**21.654**	**23.308**	**-7,1**

According to the type

Rigid trucks	975	967	0,8	11.546	11.444	0,9
Road tractors	819	1.010	-18,9	10.108	11.864	-14,8
Total trucks with GVW >3500 kg	**1.794**	**1.977**	**-9,3**	**21.654**	**23.308**	**-7,1**

Trailers and Semitrailers with GVW >3500 kg

According to the type	November 2019	November 2018	var.%	Jan-Nov 2019	Jan-Nov 2018	var.%
Trailers	100	96	4,2	1.277	1.355	-5,8
Semitrailers	1.043	1.044	-0,1	12.170	13.139	-7,4
Total R & S with GVW >3500 kg	**1.143**	**1.140**	**0,3**	**13.447**	**14.494**	**-7,2**

Passengers transport sector

Buses with GVW >3500 kg

According to the type	November 2019	November 2018	var.%	Jan-Nov 2019	Jan-Nov 2018	var.%
Urban buses/midibuses	81	160	-49,4	1.327	1.364	-2,7
Inter urban buses/midibuses	31	82	-62,2	694	1.010	-31,3
total TPL buses	**112**	**242**	**-53,7**	**2.021**	**2.374**	**-14,9**
Tourist buses/midibuses	28	29	-3,4	831	842	-1,3
Total specific buses	**140**	**271**	**-48,3**	**2.852**	**3.216**	**-11,3**
minibuses	50	38	31,6	573	567	1,1
schoolbuses	48	40	20,0	544	501	8,6
Total buses with GVW >3500 kg	**238**	**349**	**-31,8**	**3.969**	**4.284**	**-7,4**

During November, **buses** market with GVW over 3.500 kg registers 238 new units, showing a decrease of 31.8%. During the month, grow in double figures minibuses (+31.6%) and schoolbuses (+20%), while the other sectors are in slowdown: -53.7% for TPL buses and -3.4% for tourist buses an midibuses. In the first eleven months of 2019, have been released 3,969 buses certifications against the 4,284 of the period from January to November 2018, with a trend of slowdown of 7.4%.

Keep a positive sign minibuses (+1.1%) and schoolbuse (+8.6%), while close in slowdown respect to the first eleven months of 2018 for TPL buses (-14.9%) for tourist buses and midibuses (-1.3%).

The positive sign for the schoolbuses market should surely carried on if the Environment Law, that allocated 20 milion of euro for 2020/2021, would not give only the chance to buy hybrid and electric vehicles, not, at the moment, on the market. The risk is that these funds could be used only for the revamping of old vehicles instead of renewing the fleet and instead of to invest in safety, in the environmental safeguard and in the students health.

Also for the buses sector, the market slowdown contribute in the worsening the renewing of the Italian fleet, which the average age is higher of the European average.

The 2019 ACEA report about the European fleet from 2014 to 2018 included 770,000 buses in the 'UE, the 30% of them belong to Poland and Italy. It has to be underlined that included in the Italian fleet there also are, vehicles still in deposit or without necessary conditions to be on the road (car tax and inspection). The average age of the European buses is of 11.4 years: The eldest buses are in Greece (20.4 years), the youngest are in Austria (5.4 years), while in Italy is about 12.5 years.

ANFIA hopes that for the new year, could be applied the plan for the sustainable mobility, necessary for the definition of the sustainable investments for TPL companies.

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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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