

Press Release

IN OCTOBER, ANOTHER DOUBLE-DIGIT SLOWDOWN FOR TRUCKS (-10.2%) AND TOWED VEHICLES (-11.8%), WHILE IT STAYS POSITIVE THE BUSES SECTOR (+3.6%)

On the trucks and on the towed vehicles negative signs weigh the uncertainty of the new methodology for the use of the incentives provided in the Investment Law 2019/2020

Turin, November 22nd 2019 - In October 2019, have been released **1,901** certifications of **new trucks** (-10.2% respect to October 2019) and **1,118** certifications of **new heavy trailers and semitrailers**, with GVW over 3,500 kg (-11.8%), divided this way: 104 trailers (-1.9%) and 1,014 semitrailers (-12.7%).

Both sectors confirm a negative trend in the first ten months of: 19,866 certifications of **new trucks**, the 6.9% less than the period from January to October 2018, and 12,314 certifications of **new heavy trailers and semitrailers** (-7.8% respect to January-October 2018), divided this way: 1,179 trailers (-6.4%) and 11,135 semitrailers (-7.9%)

Since the beginning of the year, the decrease of the national production and of the industrial vehicles registrations reflect on the low growth of the economy, in line with the contraction of the Italian manufacturing in its overall, that in September show the seventh trend of decrease in row¹. The, **highway traffic of the heavy vehicles** in million of vehicles/km is in growth in the first eight months of 2019: +2% respect to last year, which it could mean a restarting signal for the freight transportation. Looking at the manufacturing production of the sector - field whose performance has an impact on the freight transportation sector - in the average of the first eight months of 2019, the index corrected for the calendar effect shows a trend of growth of 3.1%, even if based on the three months period is showed a decrease of the situation².

In this economic context, from January to September 2019 the national production of trucks decrease of 4.1% respect to last year. After the decreases from July to September over the 20% - following the peak of June with +37% - in October, as already showed, the trucks sales contain the decrease of 10.2%. In the North-West and in the North-East regions have been released the 58% of the certifications of January/October, the 4% less respect to the previous year, while in the regions of the Center and of the South/Islands which weigh for the 42%, the contraction has been over the 10%. Positive the trend of

¹ ISTAT Data, Index of the industrial production corrected by the calendar effects

² Sources: ISTAT

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the trend of rigid trucks market (+1% on January-October 2018) and of the segment of e lorries yard (+20%).

According to weight classes, since the beginning of the year are registered volumes in growth for trucks over 5,000 kg until 8.000 kg (+5%). What is important, instead, the decrease of road tractors: -14% in the first ten months of 2019. Since the beginning of the year have been released 823 **LNG** trucks certifications and 347 **CNG** ones.

For the towed vehicles, from January to October 2019, the decrease has been more contained respect to the national brands (-4.9%) and more significant for the international brands (-9.7%). On the other hand trucks, trailers and semitrailers register volumes in decrease in the North of Italy region (-16%) and volumes in increase in the South of Italy and in the Islands (+3.6%).

In our opinion, the negative trend of trucks and towed vehicles is weighed down by the chaos created by the new method of taking advantage of the incentives provided for in the **Investment Law 2019/2020**. The measure, which in past years also gave support and continuity to the market in the months in which it was in force, this year ran out of resources in just a few days, creating quite a few distorting effects both before publication, with the market standing still and, probably, after publication.

Considering the Fiscal Law or additional resources for the renewal of the fleet, the hope is that the implementing regulation will simplify the procedure, while it is essential to keep the same categories of incentive vehicles with and without scrapping, and, above all, the division of ceilings between alternative and traditional fuels, not to disregard the Green New Deal announced by the Government.

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In Detail:

Freight Transport Sector

Trucks with GVW > 3500 kg

according to weight classes

| | October 2019 | October 2018 | var.% | Jan-Oct 2019 | Jan-Oct 2018 | var.% |
|---|--------------|--------------|--------------|---------------|---------------|-------------|
| Medium trucks >3500 | 410 | 413 | -0,7 | 3.876 | 4.079 | -5,0 |
| Heavy trucks >=16000 kg | 1.491 | 1.704 | -12,5 | 15.990 | 17.252 | -7,3 |
| Total trucks with GVW>3500 kg | 1.901 | 2.117 | -10,2 | 19.866 | 21.331 | -6,9 |

according to type

| | October 2019 | October 2018 | var.% | Jan-Oct 2019 | Jan-Oct 2018 | var.% |
|---|--------------|--------------|--------------|---------------|---------------|-------------|
| Rigid trucks | 1.051 | 1.024 | 2,6 | 10.577 | 10.477 | 1,0 |
| Road tractors | 850 | 1.093 | -22,2 | 9.289 | 10.854 | -14,4 |
| Total trucks with GVW>3500 kg | 1.901 | 2.117 | -10,2 | 19.866 | 21.331 | -6,9 |

Trailers & Semitrailers with GVW>3500 kg

according to type

| | October 2019 | October 2018 | var.% | Jan-Oct 2019 | Jan-Oct 2018 | var.% |
|--|--------------|--------------|--------------|---------------|---------------|-------------|
| Trailers | 104 | 106 | -1,9 | 1.179 | 1.259 | -6,4 |
| Semitrailers | 1.014 | 1.161 | -12,7 | 11.135 | 12.095 | -7,9 |
| Total T&S with GVW>3500 kg | 1.118 | 1.267 | -11,8 | 12.314 | 13.354 | -7,8 |

Passengers transport sector

Buses with GVW>3500 kg

according to type

| | October 2019 | October 2018 | var.% | Jan-Oct 2019 | Jan-Oct 2018 | var.% |
|---|--------------|--------------|-------------|--------------|--------------|-------------|
| urban buses/midibuses | 184 | 126 | 46,0 | 1.263 | 1.204 | 4,9 |
| inter urban buses/midibuses | 66 | 135 | -51,1 | 664 | 928 | -28,4 |
| total LPT buses | 250 | 261 | -4,2 | 1.927 | 2.132 | -9,6 |
| tourist buses/midibuses | 51 | 30 | 70,0 | 803 | 813 | -1,2 |
| Total specific buses | 301 | 291 | 3,4 | 2.730 | 2.945 | -7,3 |
| minibuses | 67 | 49 | 36,7 | 524 | 530 | -1,1 |
| schoolbuses | 92 | 104 | -11,5 | 496 | 460 | 7,8 |
| Total buses with GVW >3500 kg | 460 | 444 | 3,6 | 3.750 | 3.935 | -4,7 |

During October, **buses** market with GVW 3,500 kg registers 460 new units, bringing an increasement of 3.6%. During the month, grow in double-digit tourist buses and midibuses (+70%) and minibuses (+36.7%), while decreases are registered in other sectors, this way divided: -4.2% LPT buses and -11.5% schoolbuses. In the first ten months of 2019, have been released 3,750 buses certifications against the 3,935 of January/October 2018, with a trend of decrease of 4.7%.

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Keep a positive sign only schoolbuses (+7.8%), while close in slowdown respect to the first ten months of 2018 LPT buses (-9.6%), tourist buses and midibuses (-1.2%) and minibuses (-1.1%).

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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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