Press Release

NEGATIVE SPIKE, IN APRIL, BOTH FOR THE TRUCKS (-61.7%) AND THE TOWED VEHICLES MARKETS (-70.7%) STRONGLY HIT BY THE COVID-19 EMERGENCY

-32%, during the month, for the market of buses, for which the changes in the mobility of citizens given by the phase of coexistence with the virus could provide an opportunity to relaunch the industrial passenger transport supply chain

Turin, May 21st 2020 – The crisis caused by the containment measures due to the COVID-19 pandemic, in April, reached a negative spike, both for the **trucks and towed vehicles markets**, already strongly affected during March (the first three months closed with -12.3% for trucks and with -36.7% for towed vehicles).

The emergency caused serious difficulties to the **autotransportation companies** in different ways, among them**,** more in general, a strong contraction of the demand and of the volumes of freights transported. Difficulties could stay also in the current Phase 2 considering, for example, that **retail** has been affected strongly in the last months. Istat estimates, for March respect to February, a slowdown of 20.5% in terms of value and of 21.3% in terms of volume, which interested mostly the sales of non-food products. What is expected is a slow recovery, due to the Government measures that are still limiting, both because of the consumer sentiment which is strongly in decrease and both because of the changes of consumers in their style to do it.

Obviously this crisis put to test also the **production of the industrial vehicles supply chain,** which restarted with all the activities last May 4th, in concomitance with the reopening of delearships and of the networks sales of the whole country and of the restarting of the provincial authorities for motor vehicles activities. The productive stop will affect on the vehicles delivering expectations. The “Relaunch Law” establishes an extension until December 31st for assets purchased with the benefits of the superamortization, while the “Take Care” Law and the “Liquidity” Law, in the extension previsions of the administrative deeds terms, will be applied to quantify the delivering extension for the autotransportation resources.

The last data available given by ACEA, the European Automobile Manufacturers’ Association, last May 11th, refers to a loss of production of 2.4 million of cars (all kinds) in the E.U. (U.K. included) – among them 159,000 in Italy – for effect of the closing of the European production plants in average for 29 working days (41 in Italy).

To keep the productive system in the next months, a key role will be played by the immediately start of the incentives measures for the autotransportation companies. The hope is that the huge resources of the “Tax Law” and of the “Budget Law” of 2019 could enter into force before summer, calling for a demands managing to solve the many critical issues arose with the new system adopted last year.

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Speaking of numbers, in this April, have been released **905** certifications of **new trucks** (-61.7% respect to April 2019) and **581** certifications of new **heavy trailers and semitrailers**, with GVW over 3,500 kg (-70.7%), divided this way: 39 trailers (-69.5%) and 542 semitrailers (-70.7%).

In the first four months of the year have been released 6,294 certifications of **new trucks**, the 26% less than the period from January to April 2019, and 3,492 certifications of new **heavy** divided this way: 285 trailers (-45.5%) and 3.207 semitrailers (-47.1%).

In details, for trucks sales in the first four months, the biggest slowdown has been reported in the North-West (-39%) and in the North-East areas (-32%), while in the Center and in the South the decrease has been contained, -12%.

Trailers instead, in the first four months of 2020, foreign brands lost the 54% of the market while national ones, register a loss of 36%.

In Details:

Freight Transport Sector

Trucks with GVW >3500 kg

according to weight classes

	april 2020	april 2019	var.%	Jan-Apr 2020	Jan-Apr 2019	var.%
Medium trucks >3500<16000 kg	169	431	-60,8	1.060	1.468	-27,8
Heavy trucks >=16000 kg	736	1.934	-61,9	5.234	7.043	-25,7
Total trucks with GVW >3500 kg	**905**	**2.365**	**-61,7**	**6.294**	**8.511**	**-26,0**

According to the type

Rigid trucks	482	1.134	-57,5	3.070	4.126	-25,6
Road tructors	423	1.231	-65,6	3.224	4.385	-26,5
Total trucks with GVW >3500 kg	**905**	**2.365**	**-61,7**	**6.294**	**8.511**	**-26,0**

Trailers and Semitrailers with GVW >3500 kg

According to the type	april 2020	april 2019	var.%	Jan-Apr 2020	Jan-Apr 2019	var.%
Trailers	39	128	-69,5	285	523	-45,5
Semitrailers	542	1.852	-70,7	3.207	6.064	-47,1
Total R & S with GVW >3500 kg	**581**	**1.980**	**-70,7**	**3.492**	**6.587**	**-47,0**

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Passengers transport sector

Buses with GVW >3500 kg

According to the type	april 2020	april 2019	var.%	Jan-Apr 2020	Jan-Apr 2019	var.%
Urban buses/midibuses	43	53	-18,9	298	390	-23,6
Inter urban buses/midibuses	26	53	-50,9	241	222	8,6
Total LPT buses	**69**	**106**	**-34,9**	**539**	**612**	**-11,9**
Tourist buses/midibuses	42	80	-47,5	375	313	19,8
Total specific buses	**111**	**186**	**-40,3**	**914**	**925**	**-1,2**
minibuses	35	22	59,1	277	174	59,2
schoolbuses	11	23	-52,2	111	185	-40,0
Total buses with GVW >3500 kg	**157**	**231**	**-32,0**	**1.302**	**1.284**	**1,4**

Buses with GVW over 3,500 kg market, in April registers 157 new units, with a decrease of 32%. During the month, a growth is registered only for minibuses (+59.1%), while close the months in double slowdown TPL buses (-34.9%), tourist buses and midibuses (-47.5%) and schoolbuses (-52.2%).

In the first four months of 2020, have been released 1,302 buses certifications against the 1,284 of the period from January to April 2019 (+1.4%). A positive sign has been registered for tourist buses and midibuses (+19.8%) and for minibuses (+59.2%), while a slowdown is registered for TPL buses (-11.9%) and for schoolbuses (-40%).

According to the geographical distribution, an increasement of 53% is registered for the North-East certifications while decrease: -2% in the North-West, -13% in the Center and -12% in the South-Islands.

What the “Relaunch Law” expects, suspending until 2024, for the beneficiaries of public resources, the obligation of co-financing for the purchase of buses, will certainly give a boost to the market, given by the health, social and economic crisis caused by Covid-19 outbreak, where LPT companies are located.

The pandemic will change in an important way citizen mobility and the ways the will use public transportation. The hope is to take the opportunity to redesign the future of mobility focusing on the innovative capacity of the Italian passenger transport supply chain, as well as contribute to a progressive increase in the national production and the competitive re location of the Italian supply chain. All this, creating work and offering new stimulus for the production of means and mobility solutions able to offer a modern and efficient service to 3 million users, who daily used it in 2019.

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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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The Automotive Production Chain in Italy
5.529 companies
274.000 employees (direct and indirect), more than 7% of the employees in the Italian manufacturing sector
105.9 billion Euros of turnover, which means 11% of the Italian manufacturing sector turnover and of 6.2% of the Italian GDP
76.3 billion Euros of tax levy of motorization