



Press Release

IN JUNE TRUCKS MARKET STRONGLY DECREASE IN DOUBLE-DIGIT (-48.3%) AND THE SLOWDOWN IS MEANFUL ALSO FOR BUSES (-53.2%), WHILE TOWED VEHICLES REGISTER THE FIRST POSITIVE SIGN SINCE THE BEGINNING OF THE YEAR (+6.2%) WHICH FACES OFF WITH A NEGATIVE JUNE 2019

Support must be given to the market by encouraging fleet renewal, both for the benefit of producers committed to investing in the latest generation products and for truckdrivers and, last but not least, road safety

Turin, July 15th 2020 - The freight transport vehicles sector shows even more difficulties in the restarting of sale and in the pre-crisis production levels. In June, in fact, the trucks market strongly decreases in double-digit respect to the previous month. Towed vehicles, instead, register the first positive sign since the beginning of 2020, which faces off with a negative June in 2019 (-2.8%). For both sectors, the first six months of 2020 closes with a strong slowdown in double digit.

The scenario in which Italian operators in the sector are moving is still critical, and even if the first signs of a recovery in the Business confidence climate appear - according to ISTAT estimates made with data collected in June 2020, the confidence index for the manufacturing sector rises from 71.5 to 79.8 and in construction grows from 108.4 to 124.0, while the services index grows both in market services (from 38.9 to 51.7) and retail trade (the index passes from 68.0 to 79.1) - the levels reached are still low.

The road transportation companies, disorientated by an unprecedented crisis from which they will slowly and not without difficulties, are delaying investments while waiting for the implementation of the measures - known for some time - to encourage the renewal of the fleets provided for by the Fiscal Law and the 2019 Budget Law, thus also making it difficult to restart the production chain. It is necessary to speed up the time needed to support the market and, given the considerable resources, to evaluate the introduction of the new measures on several occasions, in order to avoid the "click day" effect of last year, which was in fact responsible for distorting the market.

Another possible form of indirect incentive to renew the fleet, with a view to implementing the PNIEC and geared towards the carbon neutrality of freight transport, could be the adoption, by motorway concessionaire companies, of pricing policies in favour of the use of alternative powered commercial vehicles (LNG, Bio-LNG, CNG, Bio-CNG, Hydrogen, Full Electric) compared to traditional ones, as is already happening in Germany and as is being tested on the Lombardy Region's motorway network, i.e. the A35 and A58, by Bre.Be.Mi. and TEEM.

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Analyzing numbers, in June 2020 have been released **1,619** certifications of **new trucks** (-48.3% respect to June 2019) and **1,138** certification of **heavy trailers and semitrailers**, with GVW over 3,500 kg (+6.2%), divided this way: 98 trailers (-38%) and 1,040 semitrailers (+13.8%).

In the first six months of the year are registered 9,250 certification of **new trucks**, the 33.7% less respect the period from January to June 2019, and 5,549 certifications of **heavy trailers and semitrailers** (-36.1% respect the period from January to June 2019), divided this way: 469 trailers (-42.5%) and 5,080 semitrailers (-35.5%).

In details:

Freight Transport Sector

Trucks with GVW > 3500 kg
according to weight classes

	June 2020	June 2019	var. %	Jan-June 2020	Jan-June 2019	var. %
Medium trucks >3500<16000 kg	390	581	-32,9	1.743	2.542	-31,4
Heavy trucks >=16000 kg	1.229	2.552	-51,8	7.507	11.407	-34,2
Total trucks with GVW>3500 kg	1.619	3.133	-48,3	9.250	13.949	-33,7

according to type

Rigid trucks	952	1.813	-47,5	4.767	7.160	-33,4
Road tractors	667	1.320	-49,5	4.483	6.789	-34,0
Total trucks with GVW>3500 kg	1.619	3.133	-48,3	9.250	13.949	-33,7

Trailers & Semitrailers with GVW>3500 kg

according to type

	June 2020	June 2019	var. %	Jan-June 2020	Jan-June 2019	var. %
Trailers	98	158	-38,0	469	816	-42,5
Semitrailers	1.040	914	13,8	5.080	7.873	-35,5
Total T&S with GVW>3500 kg	1.138	1.072	6,2	5.549	8.689	-36,1

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Passengers transport sector

Buses with GVW>3500 kg

according to type

	June 2020	June 2019	var. %	Jan-June 2020	Jan-June 2019	var. %
urban buses/midibuses	25	104	-76,0	351	563	-37,7
inter urban buses/midibuses	57	49	16,3	314	322	-2,5
total LPT buses	82	153	-46,4	665	885	-24,9
tourist buses/midibuses	40	123	-67,5	433	562	-23,0
Total specific buses	122	276	-55,8	1.098	1.447	-24,1
minibuses	40	64	-37,5	337	294	14,6
schoolbuses	8	23	-65,2	130	247	-47,4
Total buses with GVW >3500 kg	170	363	-53,2	1.565	1.988	-21,3

Buses market with GVW over a 3,500 kg in June registers **170** new units, with a decrease of **53.2%**. All sectors close the month with a double-digit slowdown: -46.4% for LPT buses, -67.5% for the tourist buses and midibuses, -37.5% for minibuses and -65.2% for schoolbuses.

In the first six months of 2020, have been released 1,565 buses certifications against the 1,988 from January to June 2019 (-21.3%). As happened also in May, only minibuses keep the positive (+14.6%), while LPT buses (-24.9%), tourist buses and midibuses (-23%) and schoolbuses (-47.4%) are in slowdown.

The public investments in the short to medium term for the renewal of the LPT fleets, in the presence of a fleet (public and private) that is not very efficient from an environmental and safety point of view, as well as inadequate for the need of modern and alternative services to private transport, are useful prerequisites to support a recovery of the national production chain, which boasts advanced technological skills in environmental matters.

Today, the difficult context caused by the still necessary physical distancing in indoor spaces limits the presence of travellers on buses and bus operators are forced to use more means to guarantee an adequate service both from a health and from the frequency of passages point of view.

In the next months, with the activities restart in the workplaces or, in any case, with less use of smart working, the supply of public transport will once again have to be adapted to demand and guarantee the necessary journeys, providing an alternative to the use of private transport to avoid an increase in city traffic congestion.

This situation will make it necessary to carry out technical tests of mobility, which are essential, moreover, to rethink and reorganize, in a flexible manner, weekday travel in order to avoid or withstand any future shocks similar to the one created by the Covid-19 pandemic.

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For more information: ANFIA Press Office

Miriam Gangi - m.gangi@anfia.it

Ph. +39 011 5546502

Mob. +39 338 7303167

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 Supply 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 billions of Euro of income, which means 11% of the total of the production in Italy and of 6.2% of the Italian GDP

76.3 billions of Euro of tax levy of motorization

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10128 Turin - Corso Galileo Ferraris, 61 - Phone: +39 011 5546511 - Fax: +39 011 545464 - E-mail: anfia@anfia.it -
00144 Rome - Viale Pasteur, 10 - Phone: +39 06 54221493 (4) - Fax: +39 06 54221418- E-mail: anfia.roma@anfia.it
www.anfia.it