Press Release

OCTOBER STRAINS THE RECOVERY OF THE TRUCKS (-3.2%) AND OF THE TOWED VEHICLES (-1.4%) MARKETS, WHILE BUSES ARE AGAIN IN STRONG DECREASE, WITH A NEW DOUBLE-DIGIT SLOWDOWN (-18.5%)

Turin, November 26th 2020 – After the third trimester in strong recovery (+29% respect to July-September 2019), in October the trucks market shows a contraction of 3.2%. Heavy trailers and semitrailers – which in September showed a double digit positive variation (+19.1%) after two critical months, close the third trimester of 2020 at the same both at the trend level -5% and both the economic situation – the slowdown in October is contained to 1.4%. For both sectors, the closing of the first ten months of the year stays strongly negative.

The positive effects of the incentives of the Incentives Law – available from last July 29th, with a first window for the submission of the applications from October 1st to November 16th – seem to be attenuating.

Looking at the numbers, in October 2020 have been released **1,826** certifications of **new trucks** (-3.2% respect to October 2019) and **1,090** certification of new **heavy trailers and semitrailers**, with GVW over 3,500 kg (+20.4%), divided this way: 118 trailers (+16.8%) and 972 semitrailers (-3.3%).

From January to October 2020 have been released **16,212** certifications of **new trucks**, the 18.3% less respect to the same period of January-October 2019, and **9,115** certifications of new **heavy trailers and semitrailers** (-25.8% respect to January-October 2019), this way divided: 903 trailers (-23.2%) and 8,212 semitrailers (-26.1%).

Looking at the fuels, the market share of gas powered trucks from January to October 2020, is stable at 5.2%, for an overall of 841 vehicles. At mid November, the numbers of fuel pumps on roads and on highways of liquid methane and biomethane have been opened on the national territory reaching 84 units, while other 35 are already scheduled to open[1].

At the territory level, in the cumulate since the beginning of the year, the slowdown of the trucks market is stronger in the north Italy regions: -23%, while in the Center and in the South the contraction has been, respectively, of 7% and of 14%.
Referring to the weight classes, trucks with GVW between 8,000 and 12,000 kg (+0.7% respect to January-October 2019) held better. The new heavy trucks (with GVW>16,000 kg) are in slowdown instead of 18% since the beginning of the year.

[1] Source: Federmetano

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For the towed vehicles, the biggest contraction in the progressive of 2020 has been registered in the North-East market (-31%), while in the North West sales decreased of 17%.
International brands lose the 31% of the market, while national ones contain the loss with -18%.

In details:

Freight Transport Sector

Trucks with GVW > 3500 kg
according to weight classes

	October 2020	October 2019	var.%	Jan-Oct 2020	Jan-Oct 2019	var.%
Medium trucks >3500<16000 kg	268	410	-34,6	3.104	3.875	-19,9
Heavy trucks >=16000 kg	1.558	1.477	5,5	13.108	15.967	-17,9
Total trucks with GVW>3500 kg	**1.826**	**1.887**	**-3,2**	**16.212**	**19.842**	**-18,3**

according to type

Rigid trucks	790	1.039	-24,0	8.429	10.557	-20,2
Road tractors	1.036	848	22,2	7.783	9.285	-16,2
Total trucks with GVW>3500 kg	**1.826**	**1.887**	**-3,2**	**16.212**	**19.842**	**-18,3**

Trailers & Semitrailers with GVW>3500 kg

according to type	October 2020	October 2019	var.%	Jan-Oct 2020	Jan-Oct 2019	var.%
Trailers	118	101	16,8	903	1.176	-23,2
Semitrailers	972	1.005	-3,3	8.212	11.115	-26,1
Total T&S with GVW>3500 kg	**1.090**	**1.106**	**-1,4**	**9.115**	**12.291**	**-25,8**

Passengers Transport Sector

Buses with GVW>3500 kg

according to type	October 2020	October 2019	var.%	Jan-Oct 2020	Jan-Oct 2019	var.%
Urban buses / midibuses	166	170	-2,4	671	1.239	-45,8
Interurban buses / midibuses	5	65	-92,3	439	666	-34,1
Total buses used for TPL	**171**	**235**	**-27,2**	**1.110**	**1.905**	**-41,7**
Tourist buses / midibuses	54	51	5,9	653	803	-18,7
Total specific buses	**225**	**286**	**-21,3**	**1.763**	**2.708**	**-34,9**
Minibuses	50	65	-23,1	498	521	-4,4
School buses	86	92	-6,5	322	496	-35,1
Total buses with GVW >3500 kg	**361**	**443**	**-18,5**	**2.583**	**3.725**	**-30,7**

Buses market with GVW over 3,500 kg in October registers **361** new units, with a slowdown of **18.5%** (after a closing of the third trimester of 2020 with -49%). All the sectors close the month with a negative sign, except, as happened already in

September, tourist buses and midibuses (+5.9%): -27.2% for LPT buses, -23.1% for minibuses and -6.5% for schoolbuses.

In the first ten months of 2020, buses certifications released have been **2,583** (-30.7%, respect to January to October 2019). The double-digit slowdown is confirmed for the LPT buses (-41.7%), tourist buses and midibuses (-18.7%), and schoolbuses (-35.1%), while minibuses contain the slowdown with 4.4%. In the progressive of 2020 are the North East regions which decrease less: -13%.

In spite of the crisis of the market and of clients, the national automotive industry, with the upcoming publishing of the Invitalia announcement, will have the chance to take advantage of 100 million of Euro for the support of the productive investments and of the research activities, innovation and development of new technologies, with the goal that they could reinforce the national and the international competitiveness of the Italian companies.

The Italian buses industry, after difficult years, today is ready to pick and facing off the new technological challenges of the sustainable mobility, giving this way, the right contribution for the application of the National strategical plan of the sustainable mobility.

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ANFIA – Italian Association of the Automotive Industry
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