

Press release

APRIL CONTINUES TO SHOW STRONG GROWTH FOR THE TRUCK AND TRAILER MARKET, WHICH CONTRASTS THE NEGATIVE TREND RECORDED IN THE FOURTH MONTH OF COVID. BUSES STRENGTHENED THE POSITIVE RESULT IN MARCH, CLOSING AT +25%

The second period for submitting incentive applications under the Road Transport Investment Decree 2020/2021, recently extended to 14th August, opened on 14th May. Concerning the funds allocated for 2021/ 22, ANFIA reiterates the need to increase the expenditure ceiling to €700,000, so that road haulage companies wishing to invest in sustainability do not have the same limitations as those in 2020.

Turin, 19th May 2021 - After a positive end to the first quarter, in April, the market for trucks and trailer vehicles was again up sharply, as in the previous month of March. Once again, the overall numbers for the fourth month of the current year are compared to the lowest levels ever recorded, namely in April 2020, at the height of the Covid crisis (-61.7% for trucks and -70.7% for towed vehicles). This was followed by production and business stoppages at provincial motorisation offices and the closure of dealers and sales networks until 3rd May 2020.

Analysing the **April 2021 market in detail**, **2,428** registration certificates for **new trucks** were issued in the month compared to 897 certificates in April 2020 and **1,499** registration certificates for new **heavy trailers and semi-trailers**, i.e., with a gVW of more than 3,500 kg (compared to 569 in April 2020) - broken down into 139 trailers and 1,360 semi-trailers.

In the first four months of 2021, there were 9,163 registration certificates for **new trucks**, 46% more than in the first four months of 2020, and **5,338** registration certificates for new **heavy trailers and semi-trailers** (+54.1% compared to January-April 2020), broken down as follows: 488 trailers (+73%) and 4,850 semi-trailers (+52.4%).

For trucks, in the period January to April 2021, as in the first quarter of the year, all Italian geographic areas reported double-digit market increases: +59.2% in the Northwest, +53.1% in the Northeast, +43.8% in the South and Islands, and +21.7% in the Centre. By weight class, vehicles weighing more than 12 and less than 16 tonnes reported the most significant increase in registrations, +63% in the first four months of 2021 compared to the same period in 2020, followed by trucks over 3.5 and under 5 tonnes (+58.8%) and those over 16 tonnes (+49.1%) which, with 7,795 units sold in January-April 2021, represent the most significant category in terms of sales volumes. The remaining classes also grew at double-digit rates, except trucks over 8 tonnes and up to 11.5 tonnes, which fell slightly (-0.6%).

Italian Association of Automotive Industry (ANFIA)

Rigid trucks were up 38.6% in the first four months of this year, while road tractors closed the four months at +52.9%. Construction and road vehicles continued their double-digit growth in January-April 2021, at +58.6% and +44.9%, respectively. Looking at fuel types, in the first four months of the year, the market share of gas-powered vehicles was 7.7% (6.1% in January-April 2020), with a total of 706 units, while electric and hybrid diesel/electric trucks accounted for just 0.2% of the total (0.3% in January-April 2020).

In the four months, double-digit growth was also recorded for towed vehicles in all geographical areas: +69.2% in the North-East, +54.6% in the South and islands, +53.5% in the Central regions and +37.2% in the North-West. Foreign brands account for 3,153 registrations since the beginning of the year (+65.5%), while national brands, with 2,185 registrations, grew by 40.1%.

To benefit the sector's recovery and the fleet's renewal to ensure increasingly greener and safer freight mobility, **on 14th May, the second period for submitting incentive applications under the Road Transport Investment Decree 2020/2021 began.** The Ministry for Infrastructure and Sustainable Mobility extended this period until 14th August 2021 with a directorial decree on 26th April. In addition, the same legislation also extended the deadline for reporting, both about the first incentive period of last year, moving it from 30th April to 30th July 2021, and the second incentive period, setting it for 4th March 2022, the latter possibly being too long.

Concerning the funds allocated for 2021-22, ANFIA reiterates the need to increase the expenditure ceiling to €700,000, so haulage companies that want to invest in sustainability do not have apparent limitations as happened in 2020, where funds were leftover because of this restriction. In addition, it is essential that the ceiling reserved for alternative fuel commercial vehicles shows a trend of steady and continuous growth compared to the previous year's fund. The difference in incentives between alternative and traditional fuels is that they can drive sustainable purchases.

As is the case in Germany, trailers and semi-trailers would be in line with environmental and road safety policies if the scrapping of trailers over ten years old takes place.

Italian Association of Automotive Industry (ANFIA)

In detail

Freight transport sector

Trucks with GVW > 3500 kg according to weight classes

	April 2021	April 2020	% change	Jan-Apr 2021	Jan-Apr 2020	% change
Medium trucks >3500<16000 kg	359	168	113.7	1,368	1,050	30.3
Heavy trucks >=16000 kg	2,069	729	183.8	7,795	5,227	49.1
Total trucks with GVW>3500 kg	2,428	897	170.7	9,163	6,277	46.0

according to type

	April 2021	April 2020	% change	Jan-Apr 2021	Jan-Apr 2020	% change
Rigid trucks	1,129	476	137.2	4,235	3,055	38.6
Road tractors	1,299	421	208.6	4,928	3,222	52.9
Total trucks with GVW>3500 kg	2,428	897	170.7	9,163	6,277	46.0

Trailers & Semitrailers with GVW>3500 kg

	April 2021	April 2020	% change	Jan-Apr 2021	Jan-Apr 2020	% change
Trailers	139	39	256.4	488	282	73.0
Semitrailers	1,360	530	156.6	4,850	3,183	52.4
Total T&S with GVW>3500 kg	1,499	569	163.4	5,338	3,465	54.1

Passenger Transport Sector

Buses with GVW>3500 kg

	April 2021	April 2020	% change	Jan-Apr 2021	Jan-Apr 2020	% change
Urban buses / midibuses	34	43	-20.9	401	302	32.8
Interurban buses / midibuses	40	46	-13.0	318	396	-19.7
Total buses used for TPL	74	89	-16.9	719	698	3.0
Tourist buses / midibuses	42	19	121.1	115	208	-44.7
Total specific buses	116	108	7.4	834	906	-7.9
Minibuses	39	34	14.7	162	272	-40.4
School buses	35	10	250.0	165	108	52.8
Total buses with GVW >3500 kg	190	152	25.0	1,161	1,286	-9.7

Italian Association of Automotive Industry (ANFIA)

During the month, the **bus and coach market** with a gross vehicle weight of over 3,500 kg registered **190** new units, up **25%** compared to April 2020. In the fourth month of 2021, all sectors, except LPT buses (-16.9%), recorded growth, with triple-digit increases for tourist buses and midi-buses (+121.1%); school buses (+250%); and double-digit increases for minibuses (+14.7%).

During the first four months of 2021, the number of bus registrations issued was **1,161** (-9.7%, compared to January-April 2020). Tourist buses and midi-buses fell by two digits (-44.7%) and minibuses (-40.4%), while LPT buses (+3%; although intercity buses fell by 19.7%) and school buses (+52.8%) closed the four months positively.

“April still shows weak signs of recovery,” commented Giovanni De Filippis, President of ANFIA's Bus Section. The tenders currently underway will only produce effects in the second half of the year.

It will be vital for the sector's recovery that the measures envisaged to support the environmental transition are implemented rapidly”.

By fuel type, the market share of gas-fuelled buses is 4.9% in the first four months of 2021 (compared to 8.9% in the first four months of 2020), while electric and diesel/electric hybrids account for 6.9% (2.2% in January-April 2020).

Finally, at a territorial level, the most significant drop in the bus market in the first four months of 2021 was recorded in the North-West regions (-51.4%), followed by the decline in the North-East areas (-43.2%). On the other hand, the areas of the Centre (+16.6%) and the South and Islands (+35.9%) maintained a positive trend.

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

Founded in March 1912, over its hundred years, ANFIA's 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, regarding 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 are working in the sector of design, engineering, and style of motor vehicles and parts and components for the automotive industry; Motor vehicles: motor vehicles manufacturers in general, including trucks, trailers, camper vans, special means of transport.

Italian Association of Automotive Industry (ANFIA)



www.anfia.it/it/

twitter.com/ANFIA_it

www.linkedin.com/company/anfia-it/

The Automotive Production Chain in Italy

5,546 companies

278,000 employees (direct and indirect), more than 7% of the employees in the Italian manufacturing sector

106.1 billion Euros of turnover, which means 11% of the Italian manufacturing sector turnover and 6.2% of the Italian GDP

76.3 billion Euros of tax levy of motorisation

Italian Association of Automotive Industry (ANFIA)

10128 Turin - Corso Galileo Ferraris, 61 - Phone: +39 011 5546511 - E-mail: anfia@anfia.it -

00144 Rome - Viale Pasteur, 10 - Phone: +39 06 54221493 (4) - E-mail: anfia.roma@anfia.it

www.anfia.it