Press release

SIGNIFICANT GROWTH AGAIN IN JUNE FOR THE TRUCK MARKET (+41.7%), DUE TO THE COMPARISON WITH JUNE 2020, WHICH WAS SIGNIFICANTLY DOWN COMPARED TO PREVIOUS YEARS, WHILE THE TOWED VEHICLES SEGMENT IMPROVED ITS ALREADY SLIGHTLY ENCOURAGING PERFORMANCE IN JUNE 2020 CLOSING AT +16.9%. ON THE OTHER HAND, THE BUS MARKET, WHICH HAD FALLEN SHARPLY IN JUNE 2020, WAS ALSO UP 23.3%

Both commercial vehicles and towed vehicles closed the first half of the year more than 40% up on the previous year, while buses were 6% higher than in January-June 2020

Turin, 16th July 2021 - In June 2021, the market for trucks and towed vehicles continued the positive trend of the first five months of the year, with a notable double-digit growth for trucks, thanks to the comparison with June 2020, still heavily down due to the Covid crisis. Towed vehicles, however, improved on the already tentatively positive performance of the same month last year.

Analysing the June 2021 market in detail, **2,258 new truck** registration certificates were issued in the month (+41.7% more than in June 2020), and 1,307 registration certificates were issued for new **heavy trailers and semi-trailers**, i.e., with a GVW of over 3,500 kg (+16.9%), broken down into 141 trailers (+45.4%) and 1,166 semi-trailers (+14.2%).

In the first half of 2021, there were **13,595** registration certificates for **new trucks**, 47.6% more than in the first half of 2020, and **7,857** registration certificates for **new heavy trailers and semi-trailers** (+42.4% compared to January-June 2020), broken down as follows: 749 trailers (+60.4%) and 7,108 semi-trailers (+40.8%).

In the case of trucks, between January and June 2021, all Italian regions once again recorded double-digit increases: +55.6% in the Northeast, +51% in the Northwest, +50.8% in the South and Islands, and +26.5% in the Centre.
By weight class, vehicles weighing 16 tonnes or more saw the most significant increase, +51.7%, in the first six months of 2021. With 11,356 units sold in the first half of the year, this segment represents the most significant weight class in terms of volume. It was followed by trucks weighing more than six and up to 8 tonnes (+49.4%) and trucks weighing more than 12 and less than 16 tonnes (+41.4%). The remaining classes also grew at double-digit rates, except for trucks weighing more than 3.5 and up to 5 tonnes (-6.6%) and vehicles weighing more than eight and up to 11.5 tonnes (-5.9%).

Rigid trucks were up 40.7% in the first six months of this year, while road tractors closed the year at +54.9%. Construction and on-road vehicles continued their double-digit growth in the first half of 2021, at +60.9% and +46.4%, respectively.
Analysing the market by fuel type, in January-June 2021, the market share of gas-powered vehicles was 6.7% (5.4% in January-June 2020), with a total of 911 units, while electric and hybrid diesel/electric trucks accounted for just 0.2% of the total (0.4% in January-June 2020).

In the first six months of 2021, Towed vehicles also grew at double-digit rates in all geographic areas: +65.2% in the North-East, +61.9% in the Centre, +37.1% in the South and Islands, and +19.8% in the North-West.
Foreign brands totalled 4,479 registrations since the beginning of the year (+46.9%), while national brands, with 3,378 registrations, grew by 36.9%.

In this phase of slow market recovery and challenging technological transition for the goods transport sector, policies to renew the circulating fleet toward greater environmental sustainability and vehicle safety must continue and be strengthened.

We hope, therefore, that the measures to support investments and the ecological transition of the road transport sector will be **activated immediately after the summer**. In fact, on 14th August, the second incentive period of the Road Transport Investment Decree 2020-2021 will close, whose resources, except for the ceiling for swap bodies, were exhausted in a few days, with "booked" subsidies exceeding availability.

At this time of transition, the priority must be to promote alternative fuels and optimise logistics flows by supporting the renewal of trailers and semi-trailers.

ANFIA's Delegate for freight transport, Luca Sra, said: *"To date, the market, after a period of challenges and major changes due to the health emergency, is growing, but there is still work to be done. The focus is on decarbonisation, a result that can be achieved through the use and contribution of all technologies, from clean diesel, with biofuels, but especially natural gas, as a bridge technology to hydrogen. By investing in resources that are today's solution to tomorrow's requirements, such as LNG and Bio-LNG, it is possible to support and drive development towards this energy transition. To do this, the supply chain also needs tangible support, starting with the efforts and energy put into renewing a vehicle fleet that is one of the most obsolete".*

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In detail:

Freight transport sector

Trucks with GVW > 3500 kg

according to weight classes

	June 2021	June 2020	% change	Jan-June 2021	Jan-June 2020	% change
Medium trucks >3500<16000 kg	456	382	19.4	2,239	1,727	29.6
Heavy trucks >=16000 kg	1,802	1,211	48.8	11,356	7,485	51.7
Total trucks with GVW>3500 kg	**2,258**	**1,593**	**41.7**	**13,595**	**9,212**	**47.6**

according to type

Rigid trucks	1,229	930	32.2	6,659	4,734	40.7
Road tractors	1,029	663	55.2	6,936	4,478	54.9
Total trucks with GVW>3500 kg	**2,258**	**1,593**	**41.7**	**13,595**	**9,212**	**47.6**

Trailers & Semitrailers with GVW>3500 kg

according to type	June 2021	June 2020	% change	Jan-June 2021	Jan-June 2020	% change
Trailers	141	97	45.4	749	467	60.4
Semitrailers	1,166	1021	14.2	7,108	5,050	40.8
Total T&S with GVW>3500 kg	**1,307**	**1,118**	**16.9**	**7,857**	**5,517**	**42.4**

Passenger Transport Division

Buses with GVW>3500 kg

according to type	June 2021	June 2020	% change	Jan-June 2021	Jan-June 2020	% change
Urban buses / midibuses	61	37	64.9	574	367	56.4
Interurban buses / midibuses	20	67	-70.1	416	488	-14.8
Total buses used for TPL	**81**	**104**	**-22.1**	**990**	**855**	**15.8**
Tourist buses / midibuses	49	16	206.3	204	237	-13.9
Total specific buses	**130**	**120**	**8.3**	**1,194**	**1,092**	**9.3**
Minibuses	40	40	0.0	225	332	-32.2
School buses	37	8	362.5	228	130	75.4
Total buses with GVW >3500 kg	**207**	**168**	**23.2**	**1,647**	**1,554**	**6.0**

The market for **buses and coaches** over 3,500 kg totalled **207** new units in the month, up **23.2%** compared to June 2020. In the sixth month of 2021, tourist buses and midi-buses (+206.3%) and school buses (+362.5%) reported double-digit growth, while LPT buses recorded a drop of 22.1% (resulting from a 64.9% increase in the urban segment and a 70.1% drop in the intercity segment) and minibuses remained at the same level as in June 2020.

In the first half of 2021, the number of bus registration certificates issued was **1,647** (+6% compared to January-June 2020). However, double-digit declines were recorded for tourist buses and midi-buses (-13.9%) and minibuses (-32.2%), while LPT buses (+15.8%, although intercity buses fell by 14.8%) and school buses (+75.4%) closed the first half of 2021 positively.

"In June, the improvement in the LPT sector continued, and the first signs of a recovery in the tourism sector could be seen - **commented Giovanni De Filippis, President of ANFIA's Bus Section**. *The actions taken to support demand will only allow a more robust market recovery in the final part of the year"*.

By fuel type, the market share of gas-fuelled buses is 4.4% in the first six months of 2021 (compared to 8.2% in January-June 2020), while electric and diesel/electric hybrids account for 9.9% (3.4% in January-June 2020).

Finally, at a territorial level, the most significant fall in the market in the first half of 2021 is in the North-West regions (-35.3%), followed by the contraction in the North-East (-30,7%). However, there is still a positive sign for the Central regions (+31.6%) and the South and Islands area (+50.5%).

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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 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.

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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