Press release

**SUMMER CONTINUES AT TWO SPEEDS FOR THE TRUCK MARKET (+9.9% IN JULY AND -7.7% IN AUGUST), WHILE THE TRAILED VEHICLES SECTOR CONTINUES THE RECOVERY TREND WITH DOUBLE-DIGIT GROWTHS IN BOTH MONTHS (+30.1% IN JULY AND +94.3% IN AUGUST), AS WELL AS THE BUS MARKET (+40% IN JULY AND +44% IN AUGUST)**

*Turin, 23rd September 2021* - For the truck sector, the summer is moving at two different speeds, confirming in July the positive trend of the first half of 2021 but reversing in August. On the other hand, towed vehicles continued their recovery trend for the first six months of the year in both July and August.

A **detailed analysis of the July 2021** market shows that **2,438 new truck** registration certificates were issued in the month (+9.9% compared to July 2020), and **1,386** registration certificates were issued for **new heavy trailers and semi-trailers**, i.e., with a gross vehicle weight of more than 3,500 kg (+30.1%), broken down into 135 trailers (-1.5%) and 1,251 semi-trailers (+34.8%).

In August, 1,262 **new truck** registration certificates were issued (-7.7%), while for **heavy trailers and semi-trailers** the number was 1,150 (+94.3%), divided into 104 trailers (+42.5%) and 1,046 semi-trailers (+101.5%).

Between January and August 2021, there were **17,282** registration certificates for **new lorries**, 35% more than in the same period in 2020, and **10,372** registration certificates for new **heavy trailers and semi-trailers** (+44.6% compared to January-August 2020), broken down as follows: 984 trailers (+45.3%) and 9,388 semi-trailers (+44.5%).

For trucks, in the period January-August 2021, all Italian geographic areas again recorded double-digit growth: +43.6% in the South and Islands, +38.6% in the North-East, +34.8% in the North-West, +18.4% in the Central regions.
By weight class, most segments recorded a positive result. Vehicles weighing 16 tonnes or more showed the most significant growth, +39.4%, in the first eight months of 2021. With 14,344 units sold in January-August of this year, this segment represents the most important weight class in terms of volume. It is followed in the ranking by trucks weighing more than six to eight tonnes (+35.5%) and those weighing more than 12 and less than 16 tonnes (+32.9%). On the other hand, the downturn recorded in June for trucks over 3.5 and up to 5 tons worsened, closing at -22.9%.
There was a more moderate drop for above five and up to six tonnes (-8.7%) and the segment above eight and up to 11.5 tonnes (-8.3%). However, there was a positive change for vehicles over 11.5 and up to 12 tonnes (+25%).

**Italian Association of Automotive Industry (ANFIA)**

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Rigid trucks were up 29.3% in January-August 2021, while road tractors closed the year at +41.6%. As a result, construction and road vehicles maintained double-digit growth rates in the 2021 year-to-date period, up 47.3% and 34%, respectively.

Analysing the market by fuel type, in the first eight months of 2021, the market share for gas-powered vehicles was 6.1% (5.4% in January-August 2020), totalling 1,055 units, while electric and hybrid diesel/electric trucks accounted for just 0.2% of the total (0.4% in January-August 2020).

In the first eight months of 2021, Towed vehicles also grew at double-digit rates in all geographical areas: +69.9% in the North-East, +53.7% in the Centre, +39.5% in the South and Islands, +22.2% in the North-West.
Foreign brands account for 5,914 registrations since the beginning of the year (+52.2%), while national brands, with 4,458 registrations, grew by 35.5%.

To support the gradual recovery of the freight transport sector and assist it in the ongoing technological transition, it is necessary to give continuity and further impetus to the measures for renewing the fleet in a green and safety-friendly way.

After the closure, on 14th August, of the second incentive period of the Road Transport Investment Decree 2020-2021 - whose resources, except for the ceiling for swap bodies, were exhausted in only a matter of days, with "booked" contributions exceeding the funds available - **we reiterate the need for immediate activation of the two measures in the pipeline at the MIMS to support investments and the ecological transition of the road transport sector.**

It is essential to maintain and accelerate the push for alternative fuels, giving companies significant economic support to direct them towards sustainable investments that contribute to the transport sector's decarbonisation roadmap.

**ANFIA's Delegate for Freight Transport, Luca Sra, said:** *"Overall, demand for trucks continues to show signs of recovery, especially in the natural gas vehicle segment, which continues to increase its share of market penetration. However, the new measures to stimulate demand currently under discussion at the Ministry of Infrastructure and Sustainable Mobility must be defined quickly"*.

In detail:

## Freight transport sector

**Trucks with GVW > 3500 kg**

**according to weight classes**

| | August 2021 | August 2020 | % change | Jan-Aug 2021 | Jan-Aug 2020 | % change |
|---|---|---|---|---|---|---|
| Medium trucks >3500<16000 kg | 257 | 316 | -18.7 | 2,938 | 2,518 | 16.7 |
| Heavy trucks >=16000 kg | 1,005 | 1,051 | -4.4 | 14,344 | 10,279 | 39.5 |
| **Total trucks with GVW>3500 kg** | **1,262** | **1,367** | **-7.7** | **17,282** | **12,797** | **35.0** |

**according to type**

| | | | | | | |
|---|---|---|---|---|---|---|
| Rigid trucks | 809 | 779 | 3.9 | 8,793 | 6,803 | 29.3 |
| Road tractors | 453 | 588 | -23.0 | 8,489 | 5,994 | 41.6 |
| **Total trucks with GVW>3500 kg** | **1,262** | **1,367** | **-7.7** | **17,282** | **12,797** | **35.0** |

**Trailers & Semitrailers with GVW>3500 kg**

| according to type | August 2021 | August 2020 | % change | Jan-Aug 2021 | Jan-Aug 2020 | % change |
|---|---|---|---|---|---|---|
| Trailers | 104 | 73 | 42.5 | 984 | 677 | 45.3 |
| Semitrailers | 1,046 | 519 | 101.5 | 9,388 | 6,497 | 44.5 |
| **Total T&S with GVW>3500 kg** | **1,150** | **592** | **94.3** | **10,372** | **7,174** | **44.6** |

## Passenger Transport Division

**Buses with GVW>3500 kg**

| according to type | August 2021 | August 2020 | % change | Jan-Aug 2021 | Jan-Aug 2020 | % change |
|---|---|---|---|---|---|---|
| Urban buses / midibuses | 74 | 41 | 80.5 | 787 | 459 | 71.5 |
| Interurban buses / midibuses | 71 | 68 | 4.4 | 565 | 666 | -15.2 |
| **Total buses used for TPL** | **145** | **109** | **33.0** | **1,352** | **1,125** | **20.2** |
| Tourist buses / midibuses | 16 | 18 | -11.1 | 263 | 282 | -6.7 |
| **Total specific buses** | **161** | **127** | **26.8** | **1,615** | **1,407** | **14.8** |
| Minibuses | 61 | 32 | 90.6 | 351 | 412 | -14.8 |
| School buses | 36 | 25 | 44.0 | 307 | 170 | 80.6 |
| **Total buses with GVW >3500 kg** | **258** | **184** | **40.2** | **2,273** | **1,989** | **14.3** |

The market for **buses and coaches** weighing more than 3,500 kg totalled **373** new units in July, **up 48.6%** compared to July 2020. In the seventh month of 2021, tourist buses and midi-buses (+59.3%) and school buses (+193.3%) showed double-digit growth, while LPT buses recorded a positive change of 34.8% (resulting from a 173% increase in the urban segment and a 29.1% decrease in the intercity segment). Minibuses are also growing, maintaining a marginal share of the market (+43.8%).

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In August, bus registrations totalled **258** units, **40.2%** more than in the same month of 2020. During the month, the only segment to report a double-digit contraction was tourist buses and midi-buses (-11.1%), while LPT buses recorded a double-digit increase of 33% (resulting from the growth of 80.5% in the urban segment and 4.4% in the intercity segment), as did minibuses (+90.6%) and school buses (+44%).

From January to August 2021, 2,273 bus registration certificates were issued (+14.3% compared to January to August 2020). However, tourist buses and midi-buses are still down (-6.7%) and minibuses (-14.8%). In comparison, LPT buses (+20.2%, although intercity buses fell by 15.2%) and school buses (+80.6%) closed the first eight months of the year positively.

*"August shows stabilisation of the positive trend recorded since the beginning of the year, especially for the urban market -* **says Giovanni De Filippis, President of the ANFIA Bus Section.** *However, there are no signs of recovery in the tourism and intercity sectors, which are still suffering from the difficulties caused by the pandemic. Therefore, it will be of fundamental importance in the coming months to implement the provisions of the PNRR to be able to say that we have come out of the tunnel and are on a solid path".*

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).

Lastly, at a territorial level, registrations in the eight months were still down double-digit figures in the North-West regions (-16.3%), while in the North-East, the contraction was much smaller (-1.3%). On the other hand, central areas (+22%) and the South and Islands (+42.1%) continued to show double-digit growth.

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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, unique 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