

Press release

MAY CONTINUES WITH THE POSITIVE TREND OF THE FIRST FOUR MONTHS FOR THE TRUCK AND TOWED VEHICLES MARKET, THANKS TO ITS COMPARISON WITH A SEVERELY REDUCED MAY 2020. THERE WAS ALSO POSITIVE NEWS FOR THE BUS MARKET IN MAY, WHICH CLOSED THE FIRST QUARTER AT -9.7%.

The second round of incentives under the Road Transport Investment Decree 2020/2021: the amounts booked exceed 100% of the ceiling for all types of investment except swap bodies

Turin, 16th June 2021 - In May 2021, the market for trucks and towed vehicles continued the positive trend of the first four months, with double-digit increases for both trucks and towed vehicles, mainly due to the comparison with May 2020 still heavily down due to the Covid-19 emergency.

Analysing the May 2021 market in detail, 2,227 new truck registration certificates were issued in the month (+65.9% compared to May 2020), and 1,242 registration certificates were issued for new heavy trailers and semi-trailers, i.e., with a gross vehicle weight of more than 3,500 kg (+32.8%), broken down into 123 trailers (+39.8%) and 1,119 semi-trailers (+32.1%).

In the first five months of 2021, there were **11,363** registration certificates for **new trucks**, 49.1% more than in the first five months of 2020, and **6,562** registration certificates for **new heavy trailers and semi-trailers** (+49.2% compared to January-May 2020), broken down as follows: 608 trailers (+64.3%) and 5,954 semi-trailers (+47.8%).

From January to May 2021, all Italian geographic regions recorded double-digit market increases: +59.4% in the North-East, +55.7% in the North-West, +47.1% in the South and Islands, and +28.3% in the Centre.

By weight class, vehicles weighing more than 12 and less than 16 tonnes reported the most significant increase in registrations, +58.3% in the first five months of 2021 compared to the same period in 2020, followed by trucks over 16 tonnes (+52.6%) which, with 9,577 units sold in January-May 2021, represent the most important weight class in terms of volumes, and those over six and under eight tonnes (+47.5%). The remaining classes grew at double-digit rates, except for trucks over 8 tonnes and up to 11.5 tonnes, which only increased by 5.8%.

Rigid trucks are up 43% for the first five months of this year, while road tractors are up 55.3%. Construction and road vehicles continued their double-digit growth in January-May 2021, at +65.2% and +47.8%, respectively.

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Looking at fuel mix, in the first five months of the year, the market share of gas-powered vehicles was 7.3% (5.8% in January-May 2020), for a total of 824 units, while electric and hybrid diesel/electric trucks accounted for just 0.2% of the total (0.3% in January-May 2020).

Towed vehicles also recorded double-digit growth in the first five months of 2021 in all geographical areas: +68.6% in the North-East, +59.4% in the Central regions, +46.5% in the South and Islands, and +28.5% in the North-West.

Foreign brands totalled 3,086 registrations since the beginning of the year (+56.3%), while national brands, with 2,756 registrations, grew by 40.3%.

For the market to get going again from a green perspective and in favour of increased safety standards, the contribution of policies to support fleet renewal remains fundamental, starting with the **2020/2021 Road Transport Investment Decree**, whose second incentive window opened approximately one month ago, on 14th May, and will close again on 14th August.

According to the figures published by the Ministry of Infrastructure and Sustainable Mobility, except for the ceiling for swap bodies, the funds were exhausted in just a few days, and the "booked" contributions are beyond availability.

Introducing the latest generation of alternative fuelled vehicles on the market is essential to meet the **EU's CO₂ emission reduction targets**. The European Commission has recently published an enforcement decision setting out the benchmarks against which European heavy-duty vehicle manufacturers will have to calculate the reduction in emission levels under Regulation EU/2019/1242. For the reference period 2019 and for each manufacturer, it sets out the average specific CO₂ emissions, the factor for zero-low emissions, the CO₂ emission reduction trajectory, and the emission credits. As a reminder, according to Regulation EU/2019/1242, the average CO₂ emissions of the fleet of new commercial vehicles sold will have to be reduced by 15% by 2025 and 30% by 2030 compared to 2019 levels.

"The trucks and towed vehicles sector recorded a positive performance in May, continuing the trend of the first four months of the year. A significant growth compared to the same period last year, which was still strongly marked by the consequences of Covid-19," commented Luca Sra, ANFIA Delegate for Freight Transport. Finally, an essential factor, particularly as regards alternative fuels, is the support for demand from the Road Transport Investment Fund, which we hope will be renewed and reactivated by the end of the year".

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In detail

Freight transport sector

Trucks with GVW > 3500 kg
according to weight classes

	May 2021	May 2020	% change	Jan-May 2021	Jan-May 2020	% change
Medium trucks >3500<16000 kg	421	295	42.7	1,786	1,345	32.8
Heavy trucks >=16000 kg	1,806	1,047	72.5	9,577	6,274	52.6
Total trucks with GVW>3500 kg	2,227	1,342	65.9	11,363	7,619	49.1

according to type

	May 2021	May 2020	% change	Jan-May 2021	Jan-May 2020	% change
Rigid trucks	1,222	749	63.2	5,439	3,804	43.0
Road tractors	1,005	593	69.5	5,924	3,815	55.3
Total trucks with GVW>3500 kg	2,227	1,342	65.9	11,363	7,619	49.1

Trailers & Semitrailers with GVW>3500 kg

	May 2021	May 2020	% change	Jan-May 2021	Jan-May 2020	% change
Trailers	123	88	39.8	608	370	64.3
Semitrailers	1,119	847	32.1	5,954	4,029	47.8
Total T&S with GVW>3500 kg	1,242	935	32.8	6,562	4,399	49.2

Passenger Transport Division

Buses with GVW>3500 kg

	May 2021	May 2020	% change	Jan-May 2021	Jan-May 2020	% change
Urban buses / midibuses	112	28	300.0	513	330	55.5
Interurban buses / midibuses	49	25	96.0	367	421	-12.8
Total buses used for TPL	161	53	203.8	880	751	17.2
Tourist buses / midibuses	72	13	453.8	186	221	-15.8
Total specific buses	233	66	253.0	1,066	972	9.7
Minibuses	28	20	40.0	188	293	-35.8
School buses	28	14	100.0	193	122	58.2
Total buses with GVW >3500 kg	289	100	189.0	1,447	1,387	4.3

The market for **buses and coaches** over 3,500 kg registered **289** new units in the month, increasing **189%** compared to May 2020. In the fifth month of 2021, all sectors recorded a positive change with triple-digit increases, except for minibuses, which grew in double digits (+40%): LPT buses +203.8%, tourist buses and midi-buses +453.8% and school buses +100%.

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In the first five months of 2021, 1,447 bus registration certificates were issued (+4.3% compared to January-May 2020). Double-digit declines were recorded for tourist buses and midi-buses (-15.8%) and minibuses (-35.8%), while LPT buses (+17.2%, although intercity buses fell by 12.8%) and school buses (+58.2%) closed the first five months of 2021 positively.

May marks an improvement in the LPT sector, mainly due to the 'balance' of previous tenders," commented Giovanni De Filippis, President of ANFIA's Bus Section. However, there is a concern for the Tourism sector, which still suffers most from the failure to implement the measures envisaged for new investments. Only the full implementation of support measures will allow for a stable recovery".

By fuel type, the market share of gas-fuelled buses is 4.4% in the first five months of 2021 (compared to 8.3% in January-May 2020), while electric and diesel/electric hybrids account for 9.9% (3% in January-May 2020).

Finally, at a territorial level, the most significant drop in the bus market in the first five months of 2021 was recorded in the North-West regions (-40.2%), followed by a decline in the North-East areas (-38.9%). On the other hand, Central (+41.3%) and Southern regions and islands (+52%) maintained a positive trend.

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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

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