

Press release

**SLUMP IN OCTOBER FOR TRUCKS (-18.3%), TOWED VEHICLES (-15.7%)  
AND BUSES (-48.7%)**

The industrial vehicle sector was hit by the raw materials crisis, in particular the shortage of semiconductors, which is causing delays of many months in the production and delivery of vehicles, and the increase in the price of gas, which is translating into persistent increases in the pump price of CNG and LNG and AdBlue, threatening to slow down investments by operators in these technologies

*Turin, 17<sup>th</sup> November 2021* - In October, the truck market, after a favourable period in September, recorded a double-digit drop, as did towed vehicles, which interrupted the positive trend of previous months due to a significant decrease in the semi-trailer segment, while trailers were already down in September.

A detailed analysis of the October 2021 market shows that **1,479** vehicle registration certificates for **new trucks** were issued in the month (-18.3% compared to October 2020) and **892** certificates for new **heavy trailers and semi-trailers**, i.e., with a weight capacity of more than 3,500 kg (-15.7%), broken down into 92 trailers (-21.4%) and 800 semi-trailers (-15%).

In the first ten months of 2021, there were **20,527** registration certificates for **new trucks**, 26.8% more than in the same period of 2020, and **12,432** registration certificates for new **heavy trailers and semi-trailers** (+37.2% compared to January-October 2020), broken down as follows: 1,170 trailers (+29.9%) and 11,262 semi-trailers (+38%).

In the case of trucks, all Italian regions once again recorded double-digit increases in January-October 2021. In addition, the South and Islands grew by 31.2%, the Northwest by 30.2%, the Northeast by 29.1%, and the Central regions by 12%.

By weight class, vehicles weighing 16 tonnes or more show the most significant growth, +30.5%, in the first ten months of 2021. Next in the ranking are trucks weighing more than six and up to eight tonnes (+29.9%) and those over 12 and under 16 tonnes (+28.4%). On the other hand, lorries over 3.5 and up to 5 tonnes fell by double digits to -23.5%. A smaller drop was seen in the 8 to 11.5-tonne segment (-11.5%) and in the 5 to 6-tonne segment (-7.6%). However, for vehicles over 11.5 and up to 12 tonnes, the change was positive (+9.6%).

Rigid trucks were up 23.9% in the January-October 2021 period, while road tractors closed the year at +30%. As a result, construction and road vehicles maintained a double-digit growth trend over the 2021 period, at +40% and +25.6%, respectively.

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Analysing the market by fuel type, in the first ten months of 2021, the market share of gas-powered vehicles was 5.9% (5.2% in January-October 2020), for a total of 1,215 units, while electric and hybrid diesel/electric trucks accounted for just 0.2% of the total (0.3% in January-October 2020).

In the first ten months of 2021, towed vehicles also grew at double-digit rates in all geographical areas: +66.7% in the North-East, +36.2% in the Central regions, +29.2% in the South and islands, +20% in the North-West.

Foreign brands totalled 7,073 registration certificates since the beginning of the year (+45.7%), while national brands, with 5,359 registration certificates, grew by 27.4%.

As in the case of cars, the industrial vehicle sector is also suffering the consequences of the raw materials crisis, particularly the shortage of semiconductors, with delays of many months in vehicle production and delivery times, further slowing down the pace of renewal of the vehicle fleet. This situation is compounded by the continuing increase in the pump price of CNG, LNG and AdBlue due to the rise in the price of raw materials, which ultimately slows down the use of natural gas vehicles and the latest-generation Euro VI vehicles, encouraging the circulation of more polluting vehicles.

**ANFIA's Delegate for freight transport Luca Sra said:** *"To make up for this negative economic situation and not to slow down the energy transition of freight transport, it will be essential to adopt the extension in the budget law 2022 of the deadlines for the delivery of company vehicles. And the adoption of a measure to make the operating costs of road haulage companies using LNG or Bio-LNG powered vehicles more sustainable. At the same time, we expect the institutions to activate the new funds to renew the vehicle fleet as soon as possible".*

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In detail:

## Freight transport sector

Trucks with GVW > 3500 kg  
according to weight classes

	October 2021	October 2020	% change	Jan-Oct 2021	Jan-Oct 2020	% change
Medium trucks >3500<16000 kg	224	262	-14.5	3,440	3,094	11.2
Heavy trucks >=16000 kg	1,255	1,549	-19.0	17,087	13,093	30.5
<b>Total trucks with GVW&gt;3500 kg</b>	<b>1,479</b>	<b>1,811</b>	<b>-18.3</b>	<b>20,527</b>	<b>16,187</b>	<b>26.8</b>

according to type

	October 2021	October 2020	% change	Jan-Oct 2021	Jan-Oct 2020	% change
Rigid trucks	770	776	-0.8	10,413	8,407	23.9
Road tractors	709	1,035	-31.5	10,114	7,780	30.0
<b>Total trucks with GVW&gt;3500 kg</b>	<b>1,479</b>	<b>1,811</b>	<b>-18.3</b>	<b>20,527</b>	<b>16,187</b>	<b>26.8</b>

Trailers & Semitrailers with GVW>3500 kg

	October 2021	October 2020	% change	Jan-Oct 2021	Jan-Oct 2020	% change
Trailers	92	117	-21.4	1,170	901	29.9
Semitrailers	800	941	-15.0	11,262	8,158	38.0
<b>Total T&amp;S with GVW&gt;3500 kg</b>	<b>892</b>	<b>1,058</b>	<b>-15.7</b>	<b>12,432</b>	<b>9,059</b>	<b>37.2</b>

## Passenger Transport Division

Buses with GVW>3500 kg  
according to type

	October 2021	October 2020	% change	Jan-Oct 2021	Jan-Oct 2020	% change
Urban buses / midibuses	72	186	-61.3	924	708	30.5
Interurban buses / midibuses	16	22	-27.3	659	749	-12.0
<b>Total buses used for TPL</b>	<b>88</b>	<b>208</b>	<b>-57.7</b>	<b>1,583</b>	<b>1,457</b>	<b>8.6</b>
Tourist buses / midibuses	15	16	-6.3	301	304	-1.0
<b>Total specific buses</b>	<b>103</b>	<b>224</b>	<b>-54.0</b>	<b>1,884</b>	<b>1,761</b>	<b>7.0</b>
Minibuses	36	49	-26.5	428	495	-13.5
School buses	45	86	-47.7	490	322	52.2
<b>Total buses with GVW &gt;3500 kg</b>	<b>184</b>	<b>359</b>	<b>-48.7</b>	<b>2,802</b>	<b>2,578</b>	<b>8.7</b>

In October, the market for **buses and coaches** weighing more than 3,500 kg totalled **184** new units, **down 48.7%** compared to October 2020. In the tenth month of 2021, after double- and triple-digit increases in September, all sectors reported negative figures: -57.7% for LPT buses, -6.3% for tourist buses and midi-buses, -26.5% for minibuses, and -47.7% for school buses.

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Between January and October 2021, 2,802 bus registration certificates were issued (+8.7% compared to January-October 2020). Tourist buses and midi-buses are down (-1%) and minibuses (-13.5%), while LPT buses (+8.6%, although intercity buses fell by 12%) and school buses (+52.2%) closed the first ten months of the year in a favourable position.

**Giovanni De Filippis, President of ANFIA's Bus Section, commented:** *"In October, there was a severe setback in the bus sector in all segments, from urban to intercity and tourism, due to the dual effect of a lack of raw materials and electronic components, as well as the continuing difficulties of LPT companies, which are still waiting for the full availability of funds to replace their fleets given the ecological transition. Against this backdrop, the provisions of the National Reform Programme must be implemented swiftly to boost recovery and avert the possibility of losing this critical opportunity.*

By fuel type, the market share of gas-fuelled buses is 6.7% in the first ten months of 2021 (compared to 8% in January-October 2020), while electric and diesel/electric hybrids account for 9.2% (5.7% in January-October 2020).

Finally, in terms of geographical area, registrations in January-October 2021 were still down, with a more pronounced drop compared to the previous month in the North-West regions (-16.4%), while they continued to grow in all other areas: South and islands +29.2%, North-East +11.8% and Centre +3%.

*For more information:* ANFIA Press Office

Miriam Gangi - [m.gangi@anfia.it](mailto: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 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

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

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

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

[www.anfia.it](http://www.anfia.it)