Press release

SEPTEMBER SAW INCREASED DEMAND FOR TRUCKS (+13.7%), TOWED VEHICLES (+43.3%) AND BUSES (+63%)

Turin, 20 October 2021 - In September, the truck market returned to double-digit growth after the negative performance recorded in August, while towed vehicles continued the recovery trend of previous months thanks to good results in the semi-trailer segment. On the other hand, Trailers reported a double-digit decline for the month.

Analysing the **September 2021 market in detail**, **1,796** registration certificates for **new trucks** (+13.7% compared to September 2020) and 1,185 registration certificates for **new heavy trailers and semi-trailers**, i.e., with a gross vehicle weight of more than 3,500 kg (+43.3%), were issued in the month, broken down into 95 trailers (-11.2%) and 1,090 semi-trailers (+51.4%).

In the first nine months of 2021, there were **19,061** registration certificates for **new trucks**, 32.6% more than in the same period of 2020, and **11,546** registration certificates for **new heavy trailers and semi-trailers** (+44.3% compared to January-September 2020), broken down as follows: 1,078 trailers (+37.5%) and 10,468 semi-trailers (+45%).

In the case of trucks, in January-September 2021, all Italian geographic areas again recorded double-digit increases: +42.1% in the South and Islands, +36.2% in the Northeast, +31.3% in the Northwest, and +16% in the Central regions.
By weight class, most segments recorded a positive result. Vehicles weighing 16 tonnes or more showed the most significant growth, +37.2%, in the first nine months of 2021. With 15,839 units sold in January-September this year, this segment is the most prominent weight class in terms of volume. It is followed in the ranking by trucks weighing more than six and up to 8 tonnes (+31.5%) and those weighing more than 12 and less than 16 tonnes (+30%). On the other hand, the downturn already recorded in the summer months for trucks over 3.5 and up to 5 tonnes worsened to -23.1%. There was a smaller drop for vehicles over eight and up to 11.5 tonnes (-10.8%) and vehicles over 5 to 6 tonnes (-9.4%). However, for vehicles over 11.5 and up to 12 tonnes, the change was positive (+20%).
Rigid trucks were up 26.5% in the January-September 2021 period, while road tractors closed the year at +39.5%. As a result, construction and road vehicles maintained double-digit growth rates in 2021, at +43.7% and +31.6%, respectively.
Analysing the market by fuel type, in the first nine months of 2021, the market share of gas-powered vehicles was 6% (5.2% in January-September 2020), for a total of 1,143 units, while electric and hybrid diesel/electric trucks accounted for just 0.2% of the total (0.3% in January-September 2020).

In the first nine months of 2021, Towed vehicles also grew at double-digit rates in all geographical areas: +71.8% in the North-East, +49.3% in the Centre, +34.6% in the South and Islands, and +28% in the North-West.
Foreign brands totalled 6,549 registration certificates since the beginning of the year (+52.3%), while national brands, with 4,997 registrations, grew by 35%.

The freight transport sector is gradually recovering after the impact of the Covid-19 crisis, but the challenge of a technological transition that it faces requires an ongoing process. Therefore, it is essential to give continuity and more significant weight to measures to renew the circulating fleet, pushing towards a green freight mobility model characterised by increasingly high safety standards, accelerating the spread of alternative fuels and providing companies with concrete economic support to help them direct their investments towards increasing sustainability.

It is, therefore, a priority for MIMS to speed up the adoption of the High Sustainability Investment Decree and the Road Transport Investment Decree. It will also be essential to address the issue of "high prices", especially for CNG and LNG. The tripling of the cost of refuelling them risks holding entrepreneurs from investing in these technologies, which are necessary to tackle the energy transition in the freight transport sector.

Luca Sra, ANFIA's Delegate for goods transport, said: *"The evolution of the regulatory framework has accelerated the technological transition affecting the industrial vehicle sector, but the speed of change and the range of new technologies that the industrial supply chain is committed to offering to the market are counterbalanced by the need to speed up the ageing of the circulating fleet - think that, at the end of 2020, 51% of the lorry fleet and 34% of the road tractors circulating in Italy will be pre-Euro 4. To give a boost to the market, which is seeing a gradual increase in the penetration of alternative fuels, and in particular, the share of vehicles powered by natural gas, measures to support the development of biomethane, in terms of its availability and investments by road haulage companies play a key role".*

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In detail:

Freight transport sector

Trucks with GVW > 3500 kg

according to weight classes

	September 2021	September 2020	% change	Jan-Sep 2021	Jan-Sep 2020	% change
Medium trucks >3500<16000 kg	286	315	-9.2	3,222	2,833	13.7
Heavy trucks >=16000 kg	1,510	1,265	19.4	15,839	11,544	37.2
Total trucks with GVW>3500 kg	**1,796**	**1,580**	**13.7**	**19,061**	**14,377**	**32.6**

according to type

Rigid trucks	874	829	5.4	9,653	7,632	26.5
Road tractors	922	751	22.8	9,408	6,745	39.5
Total trucks with GVW>3500 kg	**1,796**	**1,580**	**13.7**	**19,061**	**14,377**	**32.6**

Trailers & Semitrailers with GVW>3500 kg

according to type	September 2021	September 2020	% change	Jan-Sep 2021	Jan-Sep 2020	% change
Trailers	95	107	-11.2	1,078	784	37.5
Semitrailers	1,090	720	51.4	10,468	7,217	45.0
Total T&S with GVW>3500 kg	**1,185**	**827**	**43.3**	**11,546**	**8,001**	**44.3**

Passenger Transport Division

Buses with GVW>3500 kg

according to type	September 2021	September 2020	% change	Jan-Sep 2021	Jan-Sep 2020	% change
Urban buses / midibuses	83	63	31.7	852	522	63.2
Interurban buses / midibuses	79	60	31.7	644	727	-11.4
Total buses used for TPL	**162**	**123**	**31.7**	**1,496**	**1,249**	**19.8**
Tourist buses / midibuses	26	7	271.4	286	288	-0.7
Total specific buses	**188**	**130**	**44.6**	**1,782**	**1,537**	**15.9**
Minibuses	47	34	38.2	393	446	-11.9
School buses	140	66	112.1	448	236	89.8
Total buses with GVW >3500 kg	**375**	**230**	**63.0**	**2,623**	**2,219**	**18.2**

The market for **buses and coaches** over 3,500 kg totalled **375** new units in September, increasing **63%** compared to September 2020. In the ninth month of 2021, tourist buses and midi-buses (+271.4%) and school buses (+112.1%) recorded triple-digit growth, while LPT buses increased by 31.7% (resulting from a growth of 31.7% in both the urban and intercity segments). Minibuses also grew (+38.2%).

In the period January to September 2021, a total of **2,623** bus registration certificates were issued (+18.2% compared to January to September 2020). Tourist buses and midi-buses (-0.7%) and minibuses (-11.9%) continued to decline slightly, while LPT buses (+19.8%, although intercity buses fell by 11.4%) and school buses (+89.8%) closed the first nine months of the year positively.

Giovanni De Filippis, President of ANFIA's Bus Section, commented: *"The recovery of the bus sector is strengthening, with positive signs also coming from the intercity and tourist segments, recovering from the difficulties caused by the pandemic. Therefore, it will be of vital importance to quickly implement, in the coming months, the provisions of the PNRR to consolidate the trend".*

By fuel type, the market share of gas-powered buses is 5.9% in the first nine months of 2021 (compared to 7.8% in January-September 2020), while electric and diesel/electric hybrids account for 9.2% (4% in January-September 2020).

Finally, at a geographical level, registrations in January-September 2021 were still down in the North-West (-8.2% compared to the previous month), while registrations increased in all other areas: North-East +11.2%, Centre +17% and South and Islands +44.2%.

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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