Press Release

ANOTHER SUCCESSFUL MONTH IN JUNE FOR THE TRUCK MARKET (+5.1%) AND TOWED VEHICLES (+22.7%), WHILE BUSES REPORTED A DOUBLE-DIGIT INCREASE AFTER FALLS IN MARCH, APRIL AND MAY

The first half of 2022 closed just below the levels of January-June 2021 for trucks (-1.1%), while towed vehicles were up in double figures (+13.4%) thanks to a positive trend in semi-trailers (+15.6%).
Over the same period, buses were down 10.5%.
The first incentive window for high-sustainability investments for freight vehicles opened on 1st July, with just over 40% of resources booked to date.
A significant initiative which, however, on its own will not be enough

Turin, 13th July 2022 – The truck and tow vehicles market remained positive in June, with a double-digit increase for heavy and semi-trailers. In addition, buses, after the heavy fall in May, returned to growth.

Analysing the **June 2022 market in detail**, 2,362 **new truck registration** certificates were issued in the month (+5.1% compared to June 2021), and **1,578** registration certificates were issued for new **heavy trailers and semi-trailers**, i.e., with a gVW of more than 3,500 kg (+22.7%), broken down into 138 trailers (+2.2%) and 1,440 semi-trailers (+25.1%).

In the first six months of 2022, there were **13,427** registration certificates for **new trucks**, 1.1% less than in the first six months of 2021, and **8,881** registration certificates for **new heavy trailers and semi-trailers** (+13.4% compared to January-June 2021), broken down as follows: 684 trailers (-7.9%) and 8,197 semi-trailers (+15.6%).

For trucks, in the first half of 2022, three out of four geographic areas show declines, albeit slight: -4.7% in the North-East, -2.8% in the Centre and -0.1% in the South and Islands. On the other hand, registrations in the North-West remained up (+2.5%).
By weight class, vehicles over 3.5 and up to five tonnes recorded the sharpest decrease (-37.6%), followed by vehicles over eight and up to 11.5 tonnes (-26.8%), vehicles over 11.5 and up to twelve tonnes (-17.2%) and the segment over six and up to eight tonnes.
(-15,7%). A minor contraction for the segment above 12 and below 16 t (-6.8%), while vehicles of 16 t and above remain stable. The only positive sign reported was for vehicles over five and up to six tonnes (+65.6%), as was the case in January-May.
Rigid trucks fell by 6.6% in January-June, while road tractors closed at +4.2%. Over the same period, construction vehicles maintained a positive trend (+2.5%), while road vehicles fell by 1.4%.

Analysing the market by fuel type, in January-June 2022, the market share of gas-powered vehicles was 3.6% (it was 6.7% in January-June 2021), with a total of 485 units, while electric and hybrid diesel/electric trucks represented just 0.2% of the total (as in the first six months of 2021).

Regarding towed vehicles, in the first six months of 2022, the regions of the North-East (+27.9%), the Centre (+24.4%), and the North-West (+18.5%) showed double-digit growth, while the area in the South and Islands recorded a drop of 6.5%.
International makes totalled 5,296 in circulation in the first six months of 2022 (+18.6%); there was also a positive change (+6.6%) for domestic makes, with 3,585 registrations.

The subsidies envisaged by MIMS for investments by haulage companies in highly sustainable vehicles (incentive window: 1st July - 16th August) play an essential role in supporting the choice of sustainable technologies at a time when the push towards decarbonisation of transport and logistics is counterbalanced by a general increase in TCO for the sector's operators. This is an issue which, primarily because of high fuel prices, is jeopardising the survival of many companies and, in the immediate future, is likely to bring road transport to a standstill.
This measure alone, however, is not enough. It is essential to put in place further initiatives, both direct and indirect, to continue to promote sustainable logistics and the modernisation of the vehicle fleet in terms of ecology - for example, by reshaping the current level of motorway toll reimbursement granted to companies in the sector according to a logic that rewards alternative fuels - while at the same time guaranteeing operating sustainability for companies.

In detail:

Freight Transport Sector

Trucks with GVW > 3500 kg

according to weight classes

	June 2022	June 2021	% change	Jan-Jun 2022	Jan-Jun 2021	% change
Medium trucks >3500<16000 kg	383	453	-15.5	2,085	2,236	-6.8
Heavy trucks >=16000 kg	1,979	1,795	10.3	11,342	11,341	0.0
Total trucks with GVW>3500 kg	**2,362**	**2,248**	**5.1**	**13,427**	**13,577**	**-1.1**

according to type

Rigid trucks	1,116	1,221	-8.6	6,205	6,647	-6.6
Road tractors	1,246	1,027	21.3	7,222	6,930	4.2
Total trucks with GVW>3500 kg	**2,362**	**2,248**	**5.1**	**13,427**	**13,577**	**-1.1**

Trailers & Semitrailers with GVW>3500 kg

according to type	June 2022	June 2021	% change	Jan-Jun 2022	Jan-Jun 2021	% change
Trailers	138	135	2.2	684	743	-7.9
Semitrailers	1,440	1151	25.1	8,197	7,088	15.6
Total T&S with GVW>3500 kg	**1,578**	**1,286**	**22.7**	**8,881**	**7,831**	**13.4**

Passenger Transport Sector

Buses with GVW>3500 kg

according to type	June 2022	June 2021	% change	Jan-Jun 2022	Jan-Jun 2021	% change
Urban buses / midibuses	47	61	-23.0	370	574	-35.5
Interurban buses / midibuses	98	20	390.0	501	416	20.4
Total buses used for TPL	**145**	**81**	**79.0**	**871**	**990**	**-12.0**
Tourist buses / midibuses	53	49	8.2	196	203	-3.4
Total specific buses	**198**	**130**	**52.3**	**1,067**	**1,193**	**-10.6**
Minibuses	38	35	8.6	199	220	-9.5
School buses	20	36	-44.4	201	226	-11.1
Total buses with GVW >3500 kg	**256**	**201**	**27.4**	**1,467**	**1,639**	**-10.5**

The market for **buses** with a gVW of over 3,500 kg totalled **256** new units in June 2022, an increase of **27.4%** compared to June 2021. In the sixth month of the year, school buses remained negative (-44.4%), while LPT buses (+79%), which recovered strongly compared to the previous month, tourist buses and midi-buses (+8.2%) and minibuses (+8.6%) closed the month with an increase.

In the first half of 2022, **1,467** bus registration certificates were issued (-10.5% compared to January-June 2021). All sectors showed negative signs: LPT buses (-12%), school buses (-11.1%) and minibuses (-9.5%) continued to fall, while the contraction was less for tourist buses and midi buses (-3.4%).

By type of fuel, the market share of gas-powered buses is 15.6% in January-June 2022 (compared to 4.5% in January-June 2021), while electric and hybrid diesel/electric represents 6.2% (9.9% in the first six months of 2021).

Finally, at a regional level, in the first six months of 2022, registrations grew in double figures in the North-West (+67.7%) and North-East (+33.7%) regions, while the South and Islands (-43.8%) and the Centre (-27.3%) continued to fall.

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ANFIA – Italian Association of the Automotive Industry
Born in March 1912, over these one hundred years, ANFIA 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, with regard to 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 one chaired by a President. Components: motor vehicle parts and components manufacturers; Car Coachbuilders and Designers: companies working in the sector of design, engineering and style of motor vehicles and/or parts and components for the automotive sector; 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
5,156 companies
268,300 employees (direct and indirect), more than 7% of the employees in the Italian manufacturing sector
92.7 billion Euros of turnover, which means 9.3% of the Italian manufacturing sector turnover and of 5.2% the Italian GDP
76.3 billion Euros of tax levy of motorization