

Italian automotive body ANFIA says Italy's truck aftermarket turnover up 3% YOY in 2025 amid uneven sector dynamics

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ANFIA's report highlights a 36% turnover increase from 2022, with mixed outcomes across three macro-families

Italy-based National Association of the Automotive Industry Supply Chain (ANFIA) announced that its Aftermarket Truck Barometer, an initiative of the Aftermarket section of ANFIA in collaboration with the Automotive section of ASAP Service Management Forum, showed that the aftermarket truck market's turnover grew 3% year over year in 2025. The turnover was up 36% compared to 2022 and up 18% compared to 2023.



Source: Getty

The quarterly performance slowed after the peak at the beginning of 2025. The first quarter stood out as the best-performing, marking the highest quarterly value of the entire analysis period. In the second and third quarters, there was a slowdown, but the levels, however, remained above the average of previous periods, the association said.

“The fourth quarter ended the year on values broadly in line with the previous quarter, confirming an overall market hold, but without further acceleration in the final part of the year,” an English-translated version of the Italian press release stated.

To carry out timely analysis, the study provided for the categorization of company codes in eight product families following a standardized nomenclature by ANFIA. The product families were divided in three macro-families (Motor & Transmission, Sopra-frame, and Sub-frame).

Throughout 2025, the Motor & Transmission product group saw one of the highest turnover volumes. After a positive first half of the year, the second half was marked by volatility, with a significant decline in the summer, a sharp recovery between September 2025 and November 2025, and a decline in December 2025. ANFIA observed that despite these swings, turnover levels remained higher than those of other product groups, confirming “structurally resilient” annual performance.

The Under-frame or Sub-frame (Sotto-Telaio) product group exhibited an irregular trend, characterized by frequent alternations between growth and decline phases throughout the year. The fluctuations were lower in the second half of 2025, and the trend of the final months allowed to limiting the contraction, highlighting a good resilience.

However, the trend of the Over-frame (Sopra-Telaio) product group was said to be critical in 2025, as it showed further signs of structural weakness, particularly in the second half of the year. After a first half during which the turnover was partly aligned with the Under-frame division, the second half was characterized by a “progressive and significant reduction in turnover, with obvious difficulties in recovering ground in the final months,” according to the ANFIA statement, which added that “the closing of the year at particularly low levels has strengthened the evidence of a negative trend, to be monitored in the coming months.”

Alessio Sitran, head of Truck & Bus Area at ANFIA Aftermarket, said in a statement that the 2025 data confirms the signs of contraction that were witnessed in the middle of the year.

"The trend of 2025 therefore leads to consider some risk flags that, even in an overall positive context, deserve timely monitoring in the coming months. In particular, the combination of slowing momentum in the second part of the year and divergent dynamics between product macro-families represents a signal of attention in the structure of market growth. We are not in the presence of a

crisis phase, but the risk flags emerged represent a useful early sign to interpret the evolution of the aftermarket truck in the short-medium term, in a framework of global economic uncertainty characterized by a still fragile resilience, low growth prospects, an uneven inflation return between the different geographical areas and monetary and trade policies that continue to influence the investment decisions of companies," Sitran said in an English-translated version of the original Italian statement.

According to ANFIA, what further adds to complexity is the slowdown in registrations recorded in 2025, especially in the medium and heavy segments linked to the introduction of European CO2 emissions standards for heavy-duty vehicles.

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