

# Show Report

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## FENATRAN 2022



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As part of our ongoing effort to collect industry intelligence and information on new products, analysts from Power Systems Research regularly attend major trade shows around the world. We share our findings with you in these Show Reports.

## FENATRAN Returns Bigger than in 2019

SAO PAULO-- The 23rd edition of FENATRAN, International Road Cargo Transport Trade Show, brought together more than 500 brands in the exhibition pavilion of São Paulo Expo, Nov. 7-11, and generated total revenue of about USD 2 billion, more than USD 200 million than the last edition of FENATRAN, held in 2019.

The visitor count reached 66,000, higher than the 65,000 for the last show.

This year's exhibition area was expanded by 20%, and totaled 100,000 m<sup>2</sup>, which was completely occupied by the exhibitors' stands five months before the gates opened.

FENATRAN is one of the most important transport trade shows in the world and each new edition presents the latest products and services to the market. Power Systems Research representatives Carlos Briganti, Amaury Rossi and Heitor Aguiar visited FENATRAN to see new trends and the latest in products .

Despite the presentations of several electric power train solutions at FENATRAN, it is difficult to believe that electrics will be a good solution for Brazil. Price, and lack of infrastructure are the main barriers to growth for electric applications.



On the other hand, Brazil is in an excellent position to produce BioGas; production of NG is increasing, and it can be the largest source of Hydrogen in the world. Ethanol and NG both can generate Hydrogen.

Based on this the applications of BE CV in Brazil will be limited to last mile delivery or LDT for urban applications.

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There is no probability of success for HD or long-haul transportation.

FENATRAN 2022 was marked by the launch of several new technologies by truck manufacturers, OEMs suppliers and companies in the logistics and implements sectors.

At FENATRAN, 18 demonstration models were available by automakers, and 2,500 test-drives were made during the 5-day event.

CV OEMs at FENATRAN 2022 presented their Euro VI new lineups.

According to our conversations with OEMs the 2022 production volume in Brazil will be in the range of 185,000, which is aligned with our forecast. They are not perceiving any pre-buy due Euro VI introduction since they are working at full capacity to produce Euro V units, which can be sold until Q1 2023.

For 2023, OEMs are expecting volume from 5% to 10% lower than 2022. They also expect problems in Q1 2023 due to the introduction of Euro VI production, which requires more electronics components. The OEMs are pricing Euro VI models 15% to 20% higher than current Euro V models. They are also advertising 5% fuel economy and an increase of load capacity for LDT and MDT.

We visited several OEMs as well their suppliers to review their new products. Here is a sample of what we saw.

**BUSINESS MODEL:** OEMs are offering rental model as business alternative. SCANIA is offering logistics services thru their new company LOTS. It means that OEMs are seeking out for more value in their business to overcome new technologies expenses.

**IVECO** showed their NG/Biogas line, which is being launched for MD, but it will be completed with the HD version. For short distances, IVECO launched the electric version of the LDT Daily.

**DAF** showed the new CF line which is now being produced in Brazil. They also showed electric trucks, but it said it has no plans to produce this product in Brazil at this time.

**MERCEDES BENZ** showed their MD autonomous vehicle for operation in closed circuit. The HD Electric



version (Actros) was also displayed. We assume that is the same platform that they are using in the bid for buses in Sao Paulo city. The batteries are Borg Warner from Germany.

**SCANIA** showed their NG/Biogas truck, which they already are selling it in the Brazilian market. The main applications for this unit are in sugar cane and garbage plants. They also showed the new S-770, which is the most powerful truck produced in high volumes in the world. Power 770 Hp, Torque 377.5 mKgf

The S-770 unit in the stand was priced at R\$ 1.6 million (USD 320,000).

There were no electric models at FENATRAN, but we were told that they are testing a unit in the Sao Paulo Trans urban bus program.

**VW Trucks & Bus** had the largest stand at FENATRAN. The company's HD Meteor has an autonomous option. The potential application for this unit is in the agricultural segment.

Plans to increase the electric lineup to 13 tons. Current e-Delivery is up to 11 tons. The plan is to keep electric vehicles in short distances applications. The company said it has no plans for long haul or HD.

**VOLVO.** Volvo showed its FM line with electrical power train. The FM IC uses the I-Shift transmission, but 10% of vehicles sold are still 9-speed synchromesh from ZF.

**CUMMINS.** Cummins is now offering a complete power train solution: Engine + transmission + cardan shaft + rear axle

The 15 liter IC engine can use different fuels such as Diesel fossil, Biodiesel, NG and Hydrogen using the same block. The cylinder head must be adapted to be compatible with the fuel.

Automatized transmissions made with Eaton JV are used. They are producing 100,000 units per year (Endurance). The volume can reach 200K/year in the coming years including China's operation.

Electric axles made by Meritor are used. Meritor is now a Cummins company.

**ARROW** is a startup operation to produce Electrical Vans. The company says it already has sold a few units this year.

**VIBRA** acquired the Petrobras gas station distribution system. They kept the name Petrobras BR for marketing purposes.

A new product is the Renewable Vibra Diesel, which has a content of 85% Diesel Fossil, 5% HVO and 10% Biodiesel from esterification of soybean. They are producing HVO in low scale, so the price is still high: R\$ 15.00/liter.

Diesel B-10 (Diesel fossil + 10% of Biodiesel) is priced at R\$ 6.90/liter.

**JAC's** new Electric vehicles line is imported from China. It includes delivery trucks (last mile) and vans.

The company sold 600 units in 2021 and expects to sell the same volume in 2022. For 2023 they will expand the line up to include a 13 ton model.

**MOURA.** Battery sets are supplied by Moura to VW for its e-Delivery truck. Currently, the Li batteries are imported from CATL China.

**WEG.** This is a Brazilian company with a global presence. It produces motors, inverters and electronic components. At FENATRAN, they showed their power train (motor+inverter) for electric vehicles.

They are supplying Li batteries imported from China for Electric Buses.

**RANDON/SUSPENSYS** produces electric axles for trailers and is offering this solution for their trailer line. They are also offering refrigerated trailer with photovoltaic panels as auxiliary power to the e-axle. Potential fuel economy is 1,800 liter of Diesel per year. **PSR**





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## About Power Systems Research

Power Systems Research (PSR), established in 1976, is the leading source of data, analysis and forecasting on the global production of engines and engine-powered equipment, including class 8 vehicles. One of its databases, EnginLink,™ includes production figures down to the model level for OEMs in key market segments, such as commercial vehicles. PSR's global research network includes eight offices and stretches across 200 countries and four continents.



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