



Market Observation

Brussels, 26 February 2009

Marc Billiet
Head EU Goods Transport







Evolution of IRU Membership

**Created
1948**

8 Founder States:



Belgium



Denmark



France



Netherlands



Norway



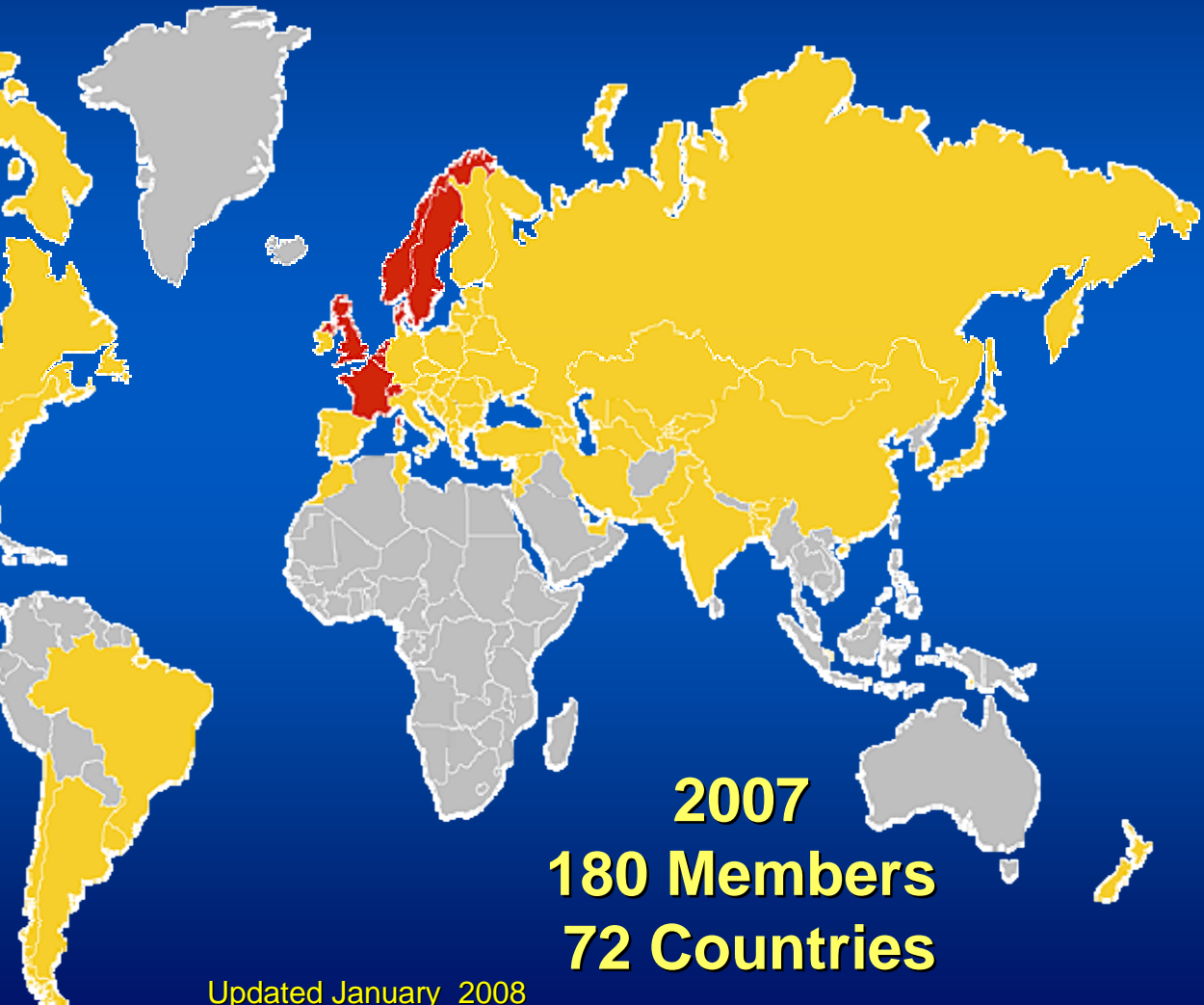
Sweden



UK



Switzerland



**2007
180 Members
72 Countries**

Updated January 2008



Evolution of IRU Structure

1948

IRU founded in Geneva



1973

IRU Permanent Delegation to the EU established in Brussels

1998

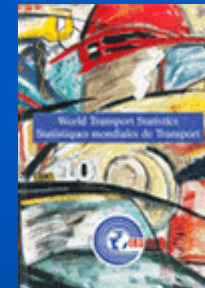
IRU Permanent Delegation to the CIS established in Moscow



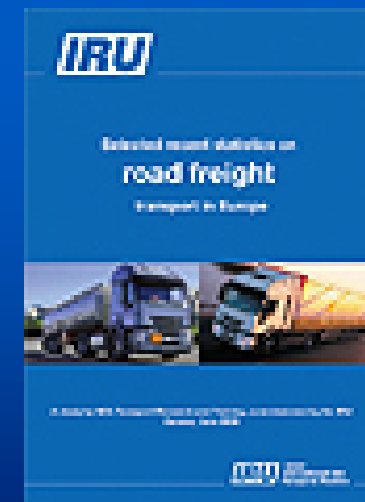
2005

IRU Permanent Delegation to the Middle East established in Istanbul

- IRU World Transport Statistics
 - 178 countries
 - Road and railway networks
 - Rolling stock
 - Number of vehicles
 - Employment
 - Modal share
- Other data sources (UN, ECMT, Eurostat)
- Specific studies



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- Specific studies



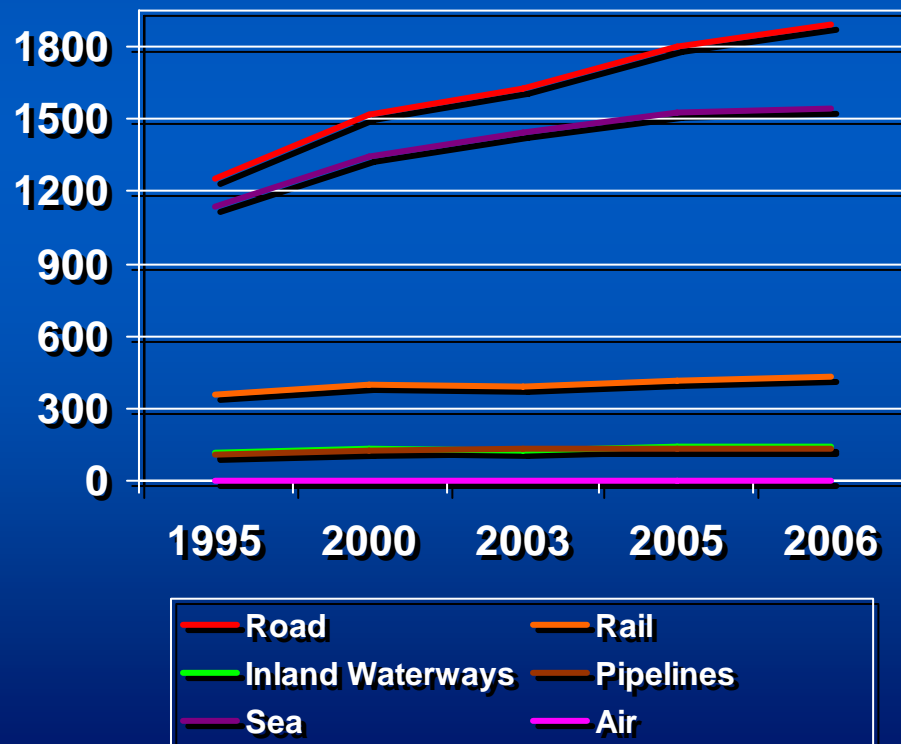
Eurostat

Statistical Pocketbook

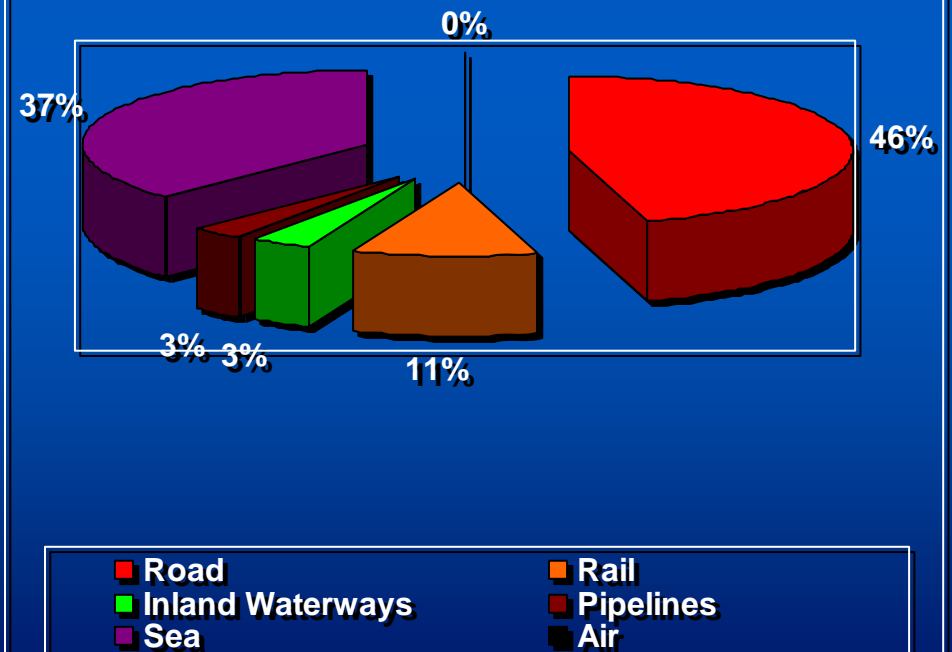
Trends in road freight transport 1999-2006

Evolution of freight transport in the EU

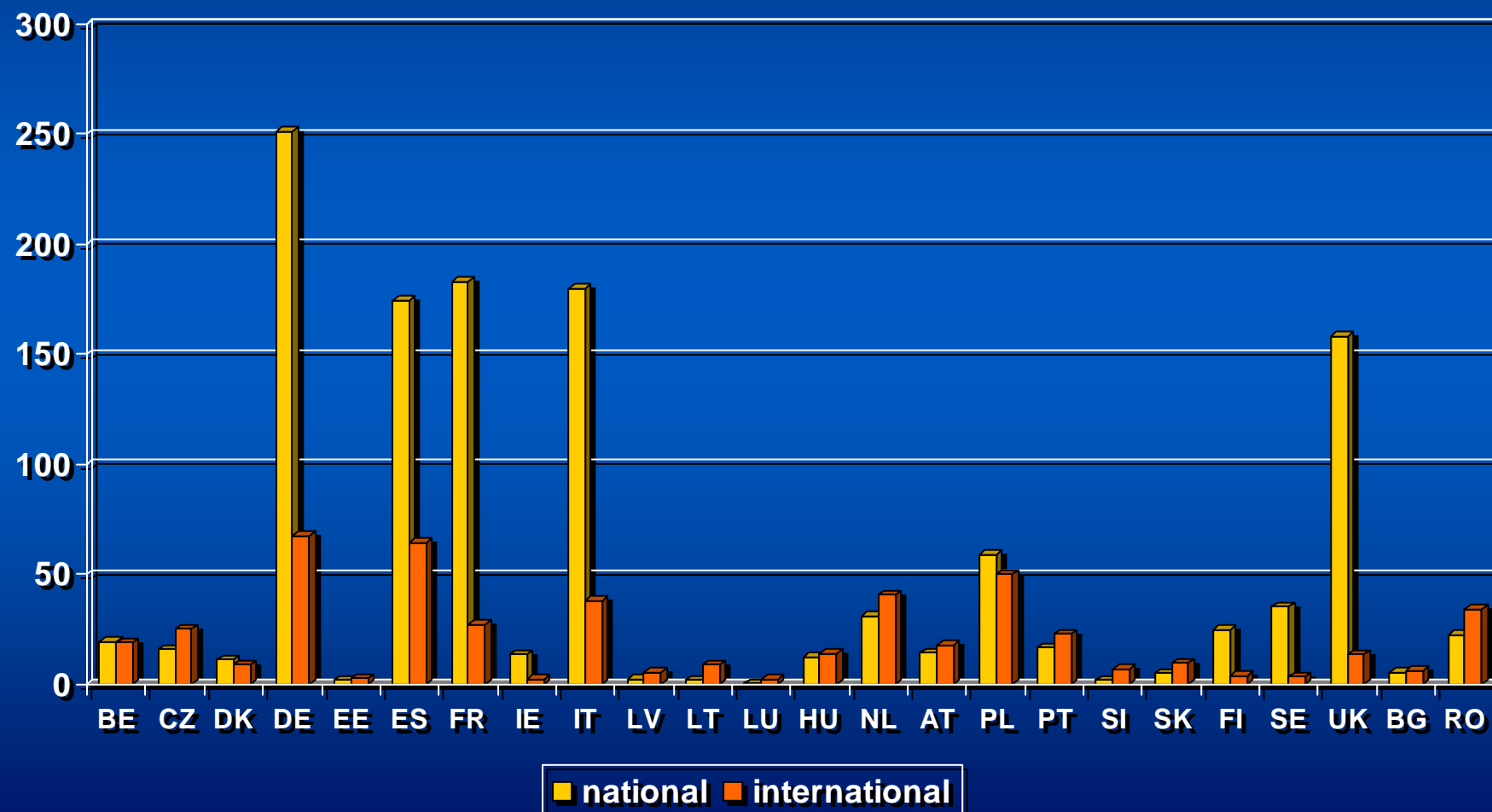
**Freight: Performance by Mode
(bio t/km)**



Modal split 2006 (%)

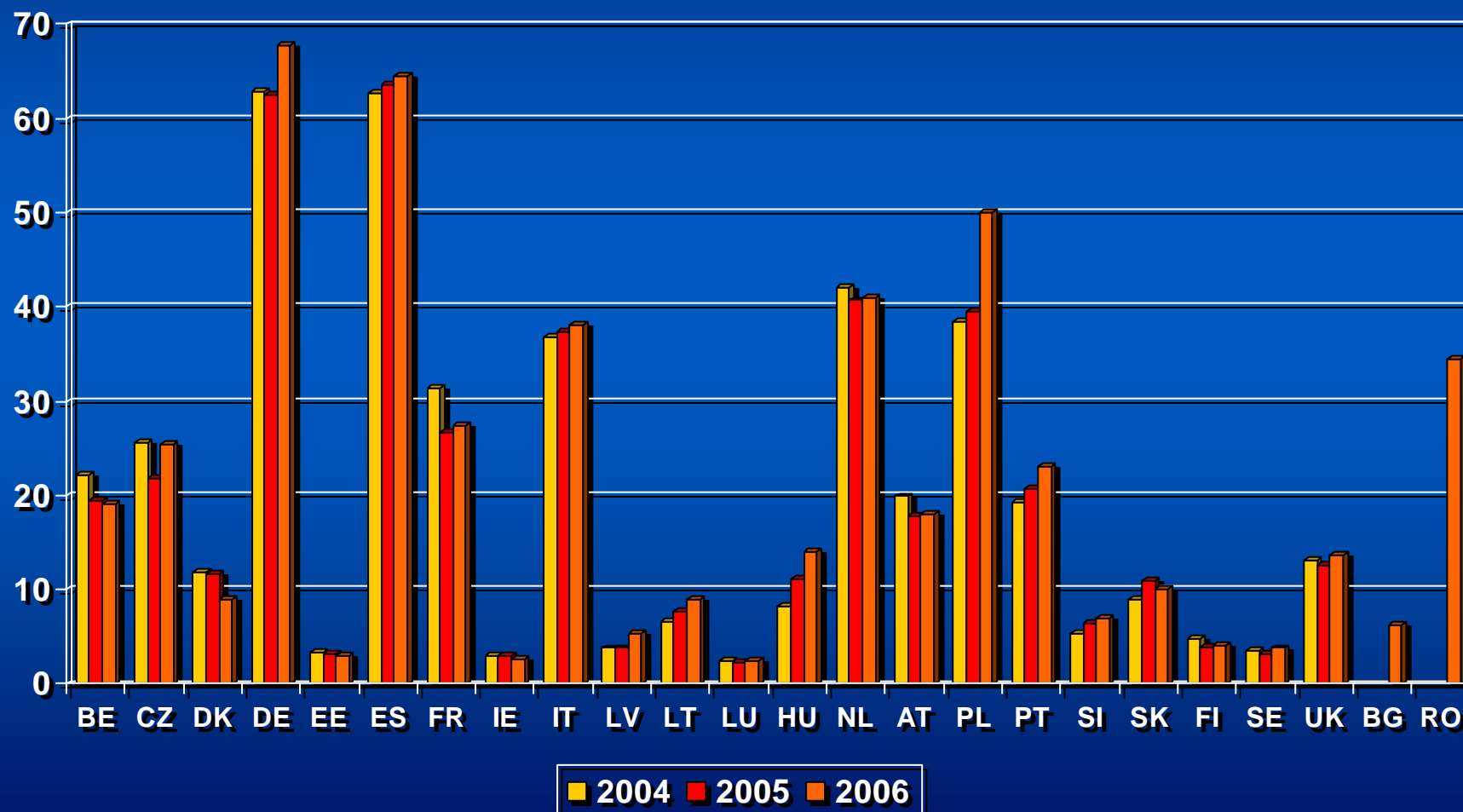


National- International road transport – billion t/km in 2006

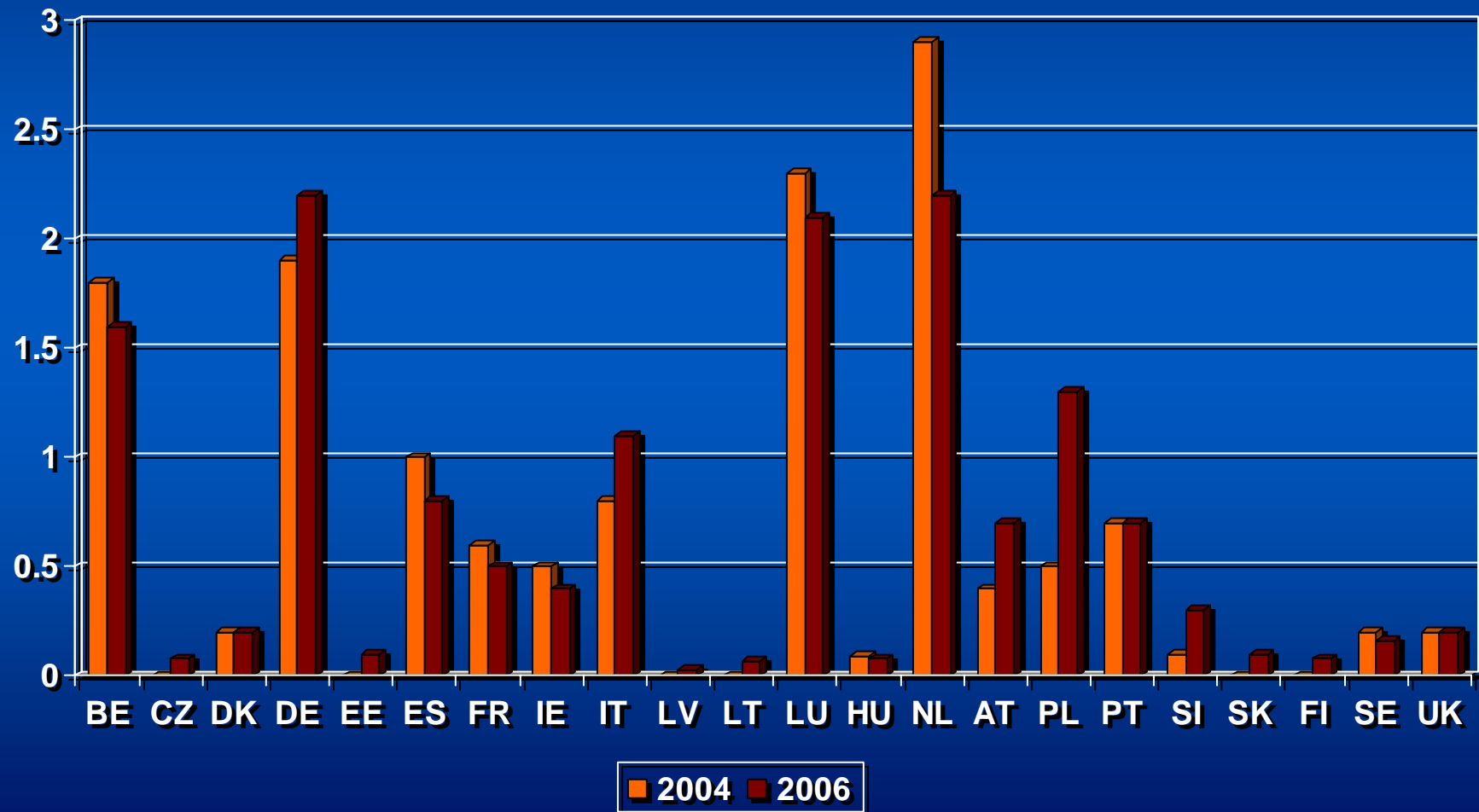




International road transport – billion t/km



Cabotage performed – billion t/km



“Selected road transport data in Europe” 2006

- Volume of international freight transport
- Industry structure
- Cost comparison
- Taxation levels (diesel, vehicle)
- Profitability
- Freight intensities

Industry Structure

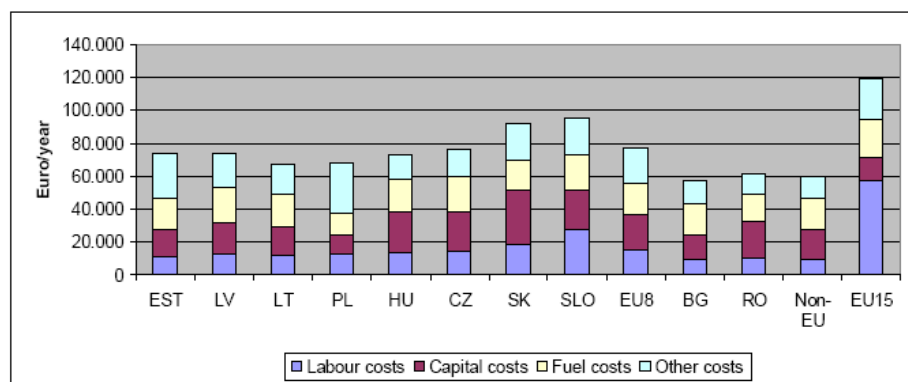
Countries			Number of vehicles						Total
	1	%	2-10	%	11-50	%	>50	%	
LT	960	29	1.908	57	422	13	38	1	3.328
SE	5.726	51	4.868	44	565	5	0	0	11.159
ES	82.210	54	54.064	35	15.871	10	421	0	152.566
DE	16.195	29	31.414	57	7.043	13	608	1	55.260
SK	3.836	37	5.760	56	633	6	58	1	10.287
NL	4.094	35	5.727	50	1.512	13	224	2	11.557
EST	143	19	452	61	141	19	6	1	742
LV	911	35	1.458	57	205	8	5	0	2.579
HU	4.500	18	16.250	65	4.000	16	250	1	25.000
PL	3.458	35	5.591	57	669	7	39	0	9.757
BG	2.229	32	4.268	61	457	7	17	0	6.971
BE	3.670	41	3.823	43	1.367	15	106	1	8.966
RO	3.862	22	5.801	33	6.416	36	1.571	9	17.650
CZ	20.738	44	23.186	50	2.635	6	141	0	46.700
RUS	892	33	1.164	43	577	21	60	2	2.693
Total	153.907	42	166.459	45	42.687	12	3.562	1	366.615
Average		34		51		13		1	

NB. PL and RUS and EST data refers to international transport only

Source: Questionnaire among IRU member associations and ministries of transport

Costs in international road freight 1998-2004

Figure 2.3.1: Costs and cost structures in international goods road transport, NEI, 1998



NB CEEC is the average of EST / LV / LT / PL / HU / CZ / SK / SLO / BG / RO

Figure 2.3.2: Total costs in international goods road transport, NEI, 1998, EU15=100

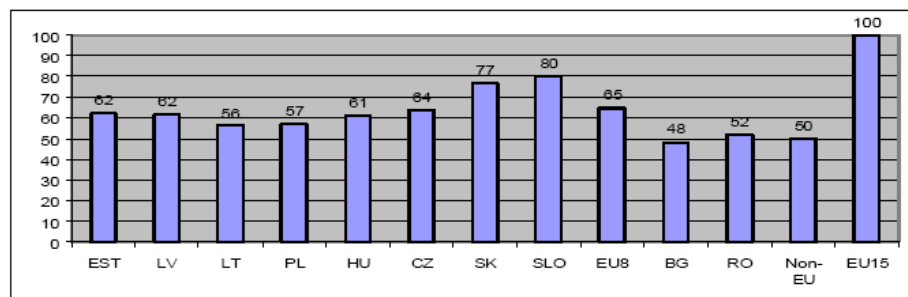
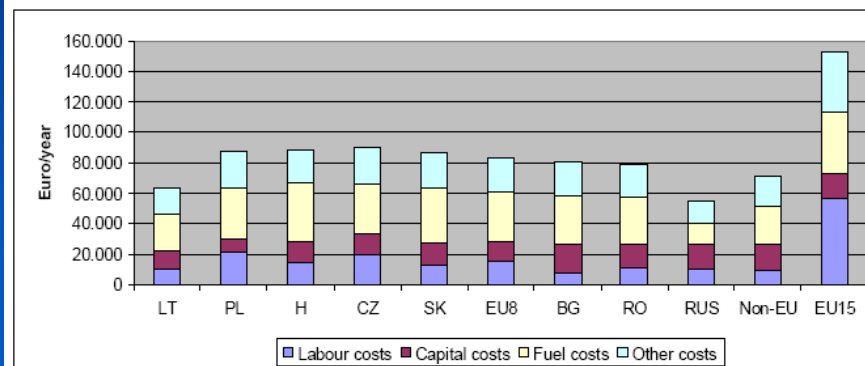
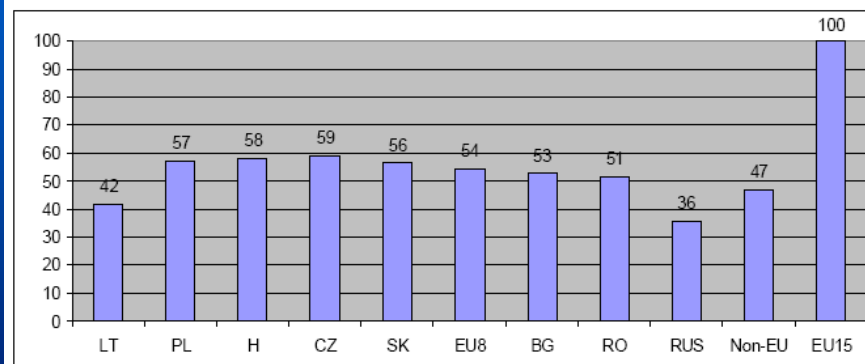


Figure 2.3.5: Costs and cost structures in international goods road transport, NEA, 2004



Source: Questionnaire among IRU members associations, Cost comparison and cost developments in the European road haulage sector, NEA Transport research and training, 2005.

Figure 2.3.6: Total costs in international road goods transport, NEA, 2004, EU15=100

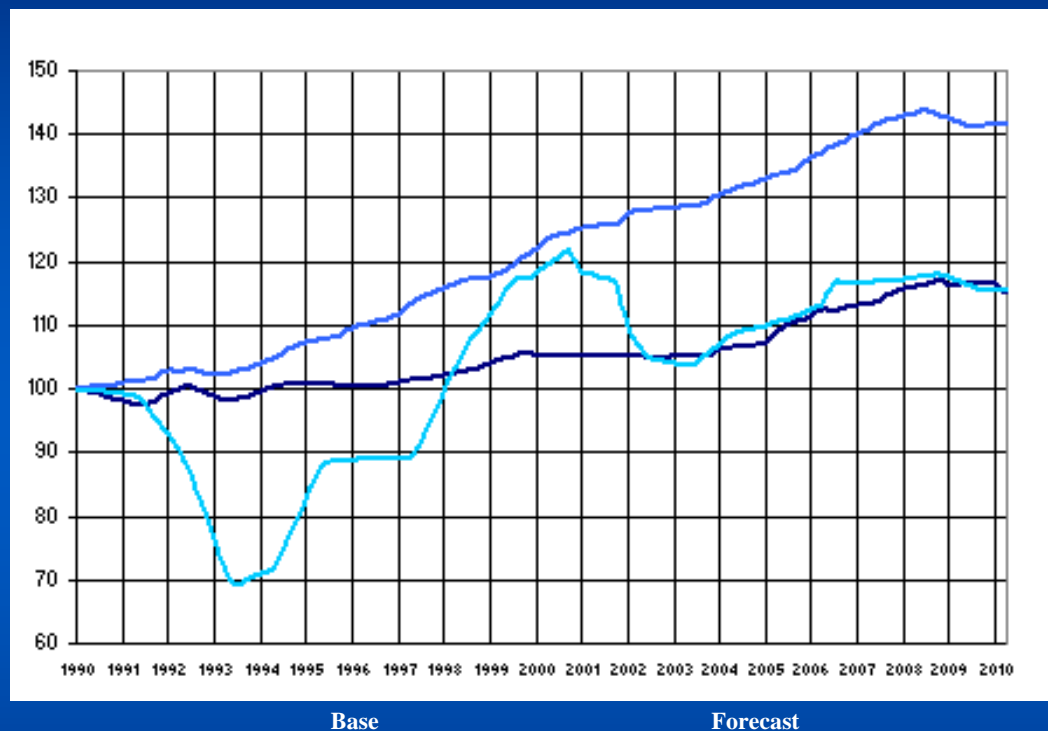


Source: Questionnaire among IRU members associations, Cost comparison and cost developments in the European road haulage sector, NEA Transport research and training, 2005.



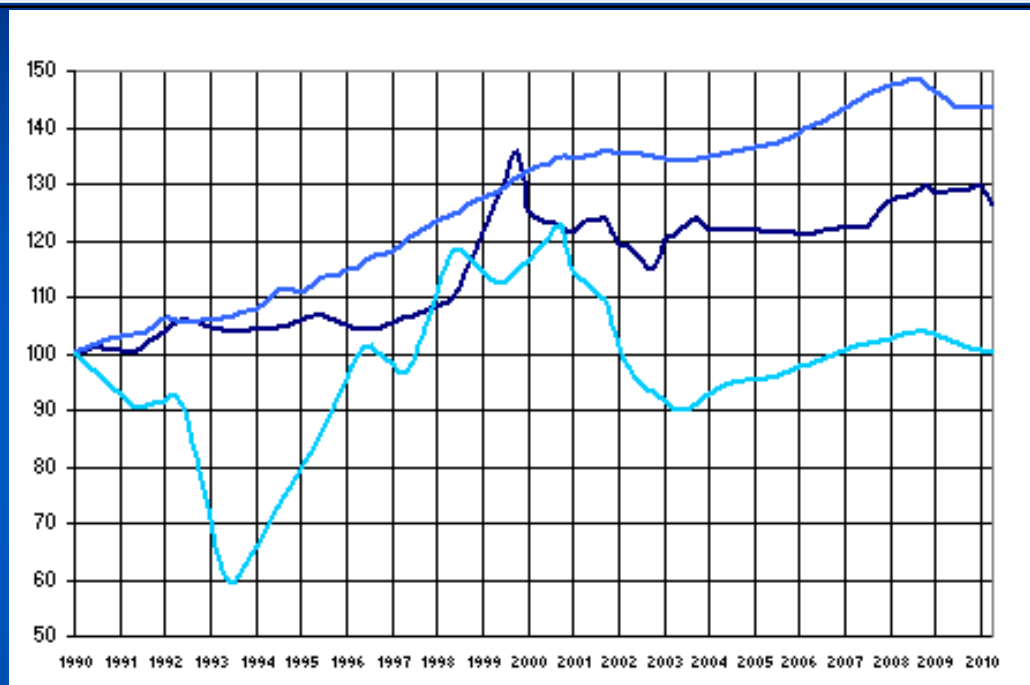
IRU Road Transport indices

[**http://www.iru.org/index/en_services_indices_index**](http://www.iru.org/index/en_services_indices_index)



Index Category	1990 - 1 st Quarter		2009 - 2 nd Quarter		2010 - 2 nd Quarter	
	Index	Value	Index	Value	Index	Value
Road Freight Transport (Million tonnes)	100.0	2795.2	116.5	3255.1	115.2	3220.0
GDP (\$ Billion)	100.0	1789.6	141.9	2539.2	141.8	2537.1
Truck Registration (Nb Registration)	100.00	77600	116.91	90723	115.34	89500

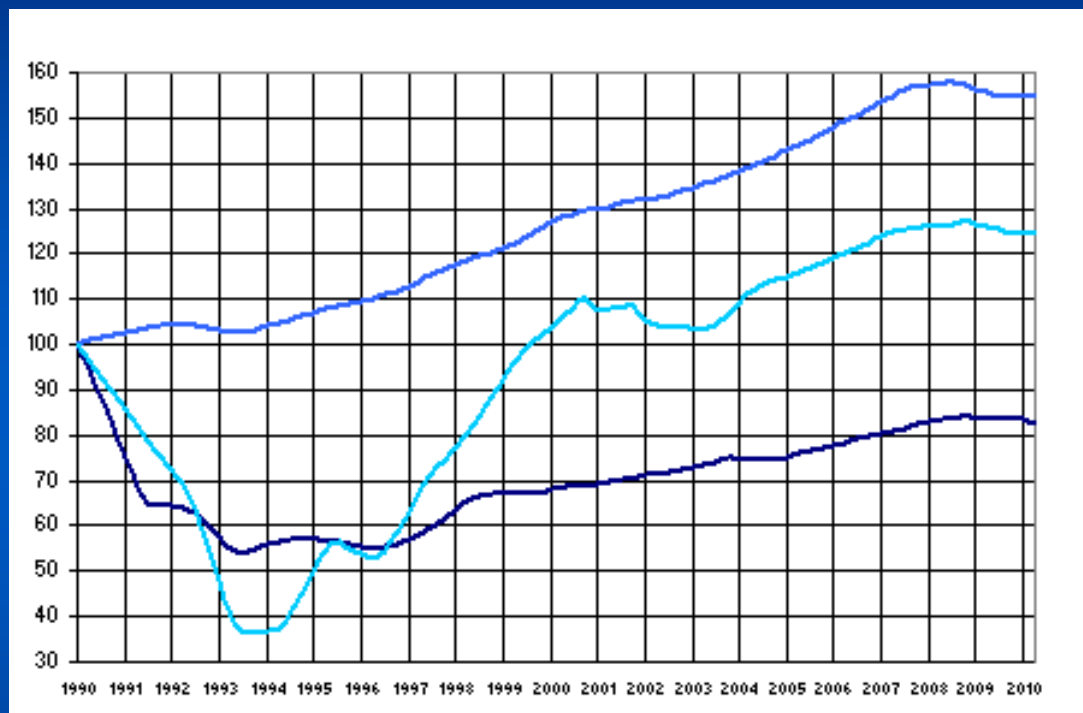
The Netherlands



Base

Forecast

Index Category	1990 - 1 st Quarter		2009 - 2 nd Quarter		2010 - 2 nd Quarter	
	Index	Value	Index	Value	Index	Value
Road Freight Transport (Million tonnes)	100.0	114.2	128.8	147.1	126.1	144.0
GDP (\$ Billion)	100.0	69.9	145.0	101.3	143.4	100.2
Truck Registration (Nb Registration)	100.00	3813	102.71	3916	100.40	3828



Base

Forecast

Index Category	1990 - 1 st Quarter		2009 - 2 nd Quarter		2010 - 2 nd Quarter	
	Index	Value	Index	Value	Index	Value
Road Freight Transport (Million tonnes)	100.0	268.8	83.6	224.6	82.5	221.8
GDP (\$ Billion)	100.0	121.6	155.7	189.4	154.7	188.1
Truck Registration (Nb Registration)	100.00	8267	125.92	10410	124.30	10276

- The challenge is to obtain reliable data very fast.
- This is almost an impossible task on a large scale.

- Some road freight transport data:
 - Volumes are down by up to 50% depending on country and sector.
 - Vehicle registrations have come to a standstill.
 - Prices are down with a minimum of 10-20%.
 - Bankruptcies have doubled.
 - Thousands of jobs have either been lost or are in danger.



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for a better future*



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