Development in the Road Transport Market

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Evolution of IRU Membership

2012: 170 Members in 73 countries

2012: 22 CRIPA Members
EU and OECD - double dip recession ahead

Source: IRU Road Transport Indices, 2012
BRIC countries forge ahead
Right focus on SMEs

Source: IRU Road Transport Indices, 2012
Investments by Road Transport Operators

Capacity Increase vs. Replacement of Vehicles

- 2011 – focus on replacement investments (lack of adequate capital reserves of transport operators)
- Expansion investments have been rare (some catch-up effects, investments mainly by large logistics providers)
Economic crisis and the second-hand market

General trend:

- The economic crisis led in many countries to an oversupply of transport capacity and thus a decrease in the price of second-hand vehicles.

- Vehicle manufacturers offered considerable rebates for new vehicles during the years 2009 and 2010, which in turn put added pressure on the second-hand market.
Economic crisis and the second-hand market

Regional trend:

- Many vehicles bought in Northern and Central Europe were traditionally sold on the second-hand markets of Southern and Eastern Europe.

- The ongoing economic crisis has hit southern countries unproportionally hard and transport operators in these countries do not have the means to purchase vehicles anymore.

- This has led to an increase of second-hand vehicles in northern countries, and thus a rapid depreciation of existing assets.
Dramatic Fuel Price Increase!

Fuel Prices - United Kingdom

Fuel Prices - Italy

Fuel Prices - France

Fuel Prices - Russian Federation
Need to diversify the energy market
Biofuels are not the solution!
IRU Resolution on Fuel Price Strategy for Governments

Calls on Governments to:

• Introduce a “professional fuel”
• With the same tax as other modes
Save the date!

7th Euro-Asian Road Transport Conference & Ministerial Meeting

Amman, 12-13 June 2013
Working together for a better future