Transport Trends and Challenges in the Road Sector

UNECE Working Party on Transport Trends and Economics
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This is the IRU
IRU Road Transport Indices
(GDP, transported t., vehicle registrations)

Survey of IRU Members

Data Source
BRIC Countries

Continuous growth through and after crisis

In 2010: +8.2% increase in transported tonnes
In 2010: +13.7% increase in registered vehicles
Continuous growth through and after crisis (+4.8% transported t.). New vehicle registrations rising again (+4.9%). Overall growth rate is lower than in BRIC.
OECD Countries

Reaching pre-crisis levels (transported t.)
Dramatic drop in new vehicle registrations
=> Transporting the same amount but with an older fleet
EU Countries

Recovering but still below pre-crisis levels

Pre/post crisis comparison (2008-11): -10.4% in transported t. and 42.4% in new vehicle registrations

=> Transporting less with an older fleet
In focus: Greece

Not recovering and below pre-crisis levels

**In focus: Greece**

Not recovering and below pre-crisis levels
Transport licence was necessary:
Investments of ~100,000 € (Licences were limited to 33,000. No additional licenses issued since 1970!)

Financial crisis and economic slowdown made it hard to repay loan

Since 2010: Liberalisation of road transport market lead to increase of competition and decrease value of licenses
In Focus: Greece
Challenges and Opportunities

Austerity measures lead to increased taxes
Increased fuel price

Fuel Prices - Greece

Price is in EUR
In Focus: Greece
Challenges and Opportunities

Economic decline and decrease in purchase power lead to less international transport of goods (import and export)

Privatisation of state companies (railways, harbours, logistic centres, etc.) opens new investment and transport opportunities
Key cost and efficiency drivers in the road transport sector

Key cost drivers in 2011 are fuel price, vehicle costs and labour costs

Business Drivers 2011

Recommendation to Transport Operators:
Transport only if you can make profit!

Source: Capgemini 2011
IRU Resolution –
Strategy for Governments

- Road transport is a production tool
- Stop penalising road transport with new regulatory burdens and new fiscalities
- Facilitate trade and road transport
Save the date!

7th Euro-Asian Road Transport Conference & Ministerial Meeting

Amman, 13-14 June 2013