



Informal document No. 5
Agenda item 6 (c)

Transport Trends and Challenges in the Road Sector

UNECE Working Party on
Transport Trends and Economics
Geneva, 6-7 September 2011

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This is the IRU





Evolution of IRU Membership

**Created
in 1948**

**National Associations
from 8 founding countries**



Belgium



Denmark



France



Netherlands



Norway



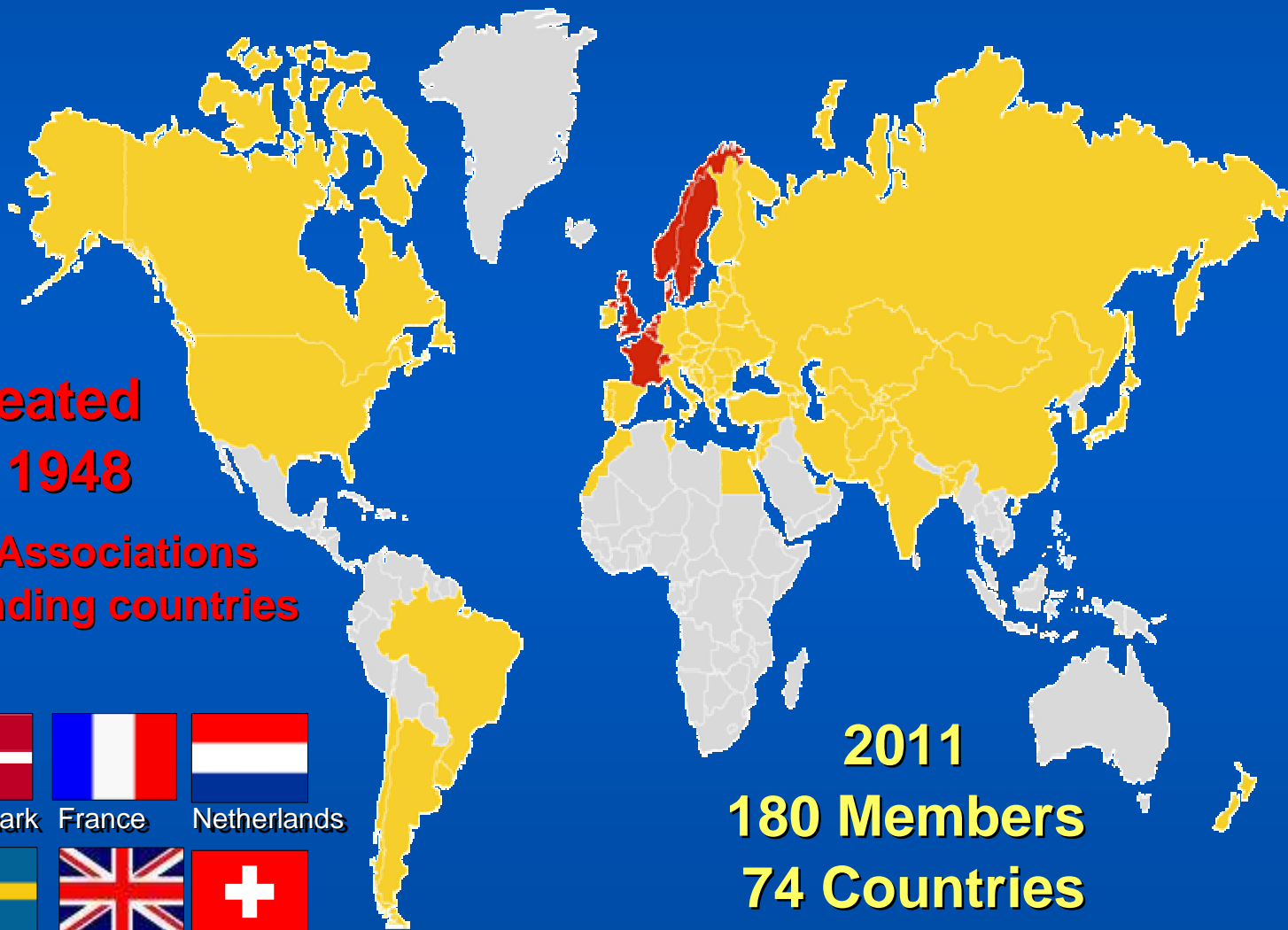
Sweden



UK



Switzerland

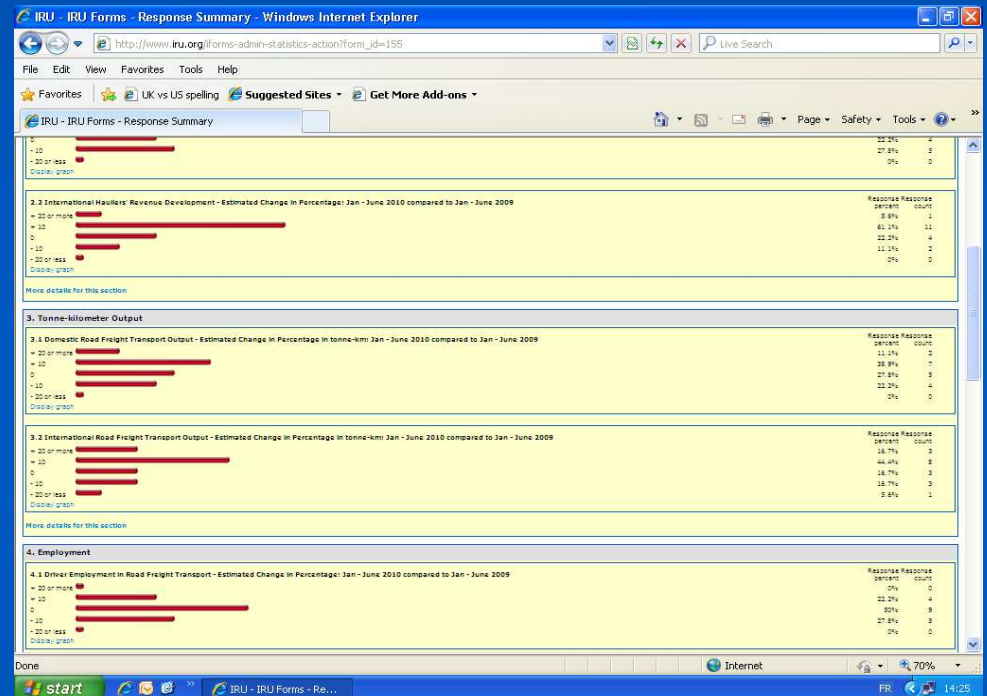
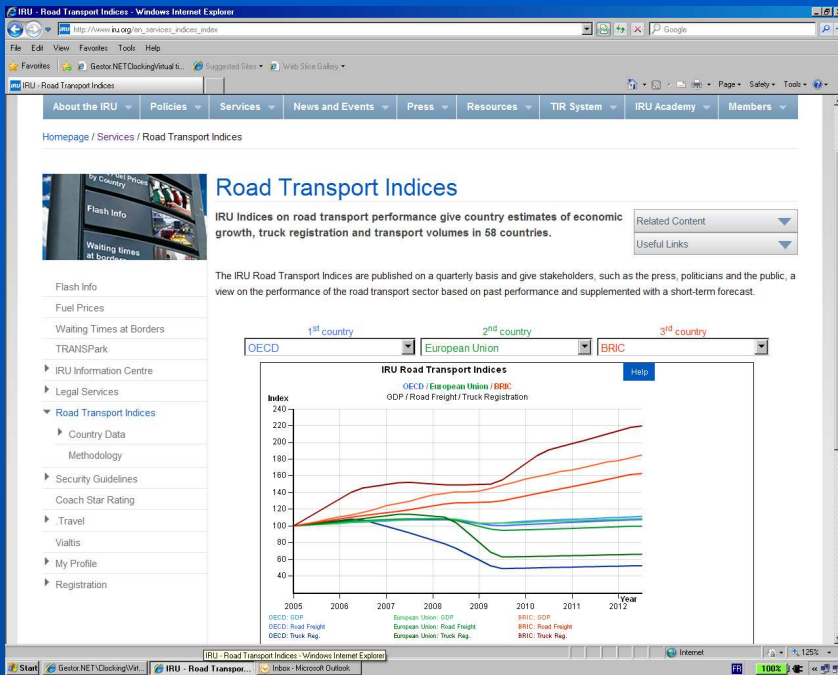


**2011
180 Members
74 Countries**



Data Source

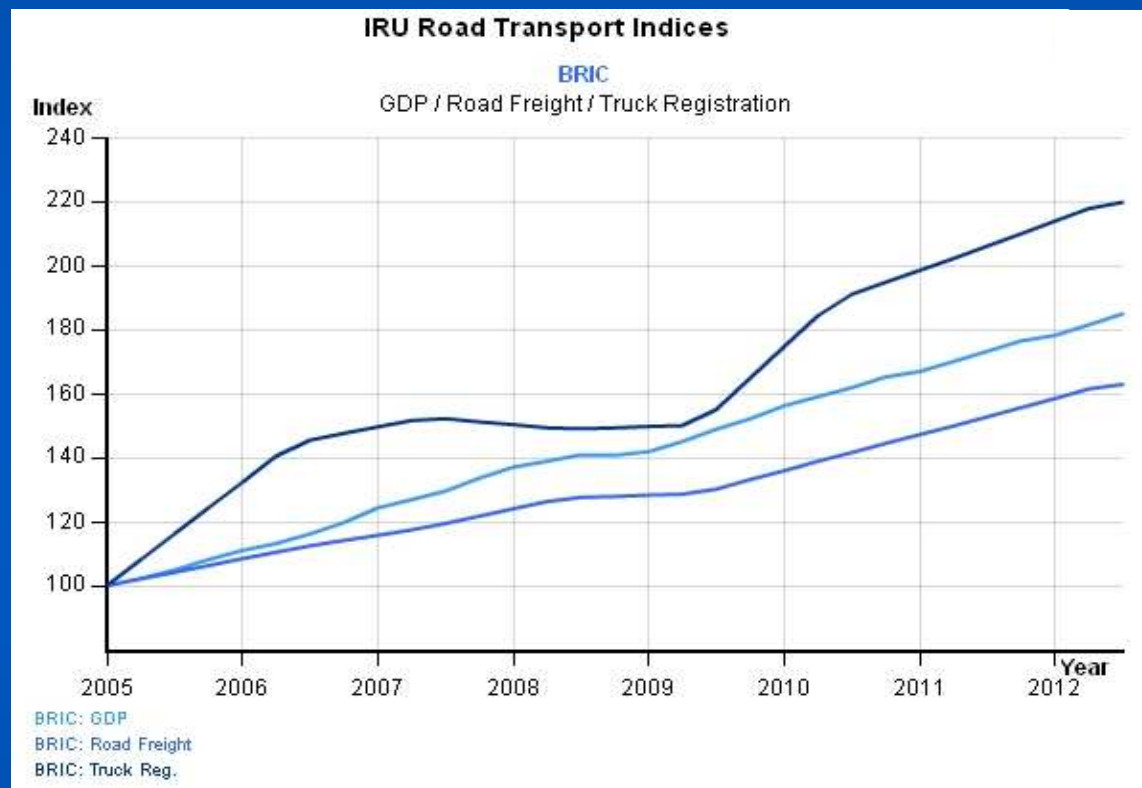
IRU Road Transport Indices (GDP, transported t., vehicle registrations)



Survey of IRU Members



BRIC Countries



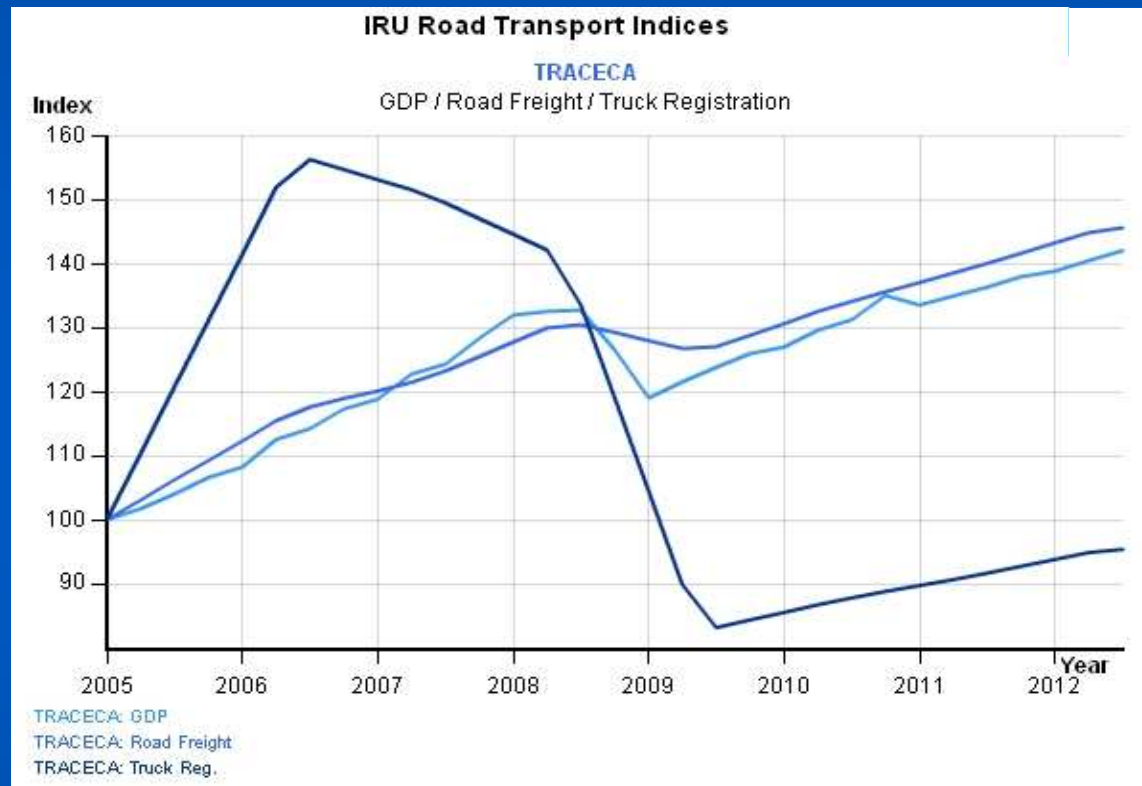
Continuous growth through and after crisis

In 2010: + 8.2% increase in transported tonnes

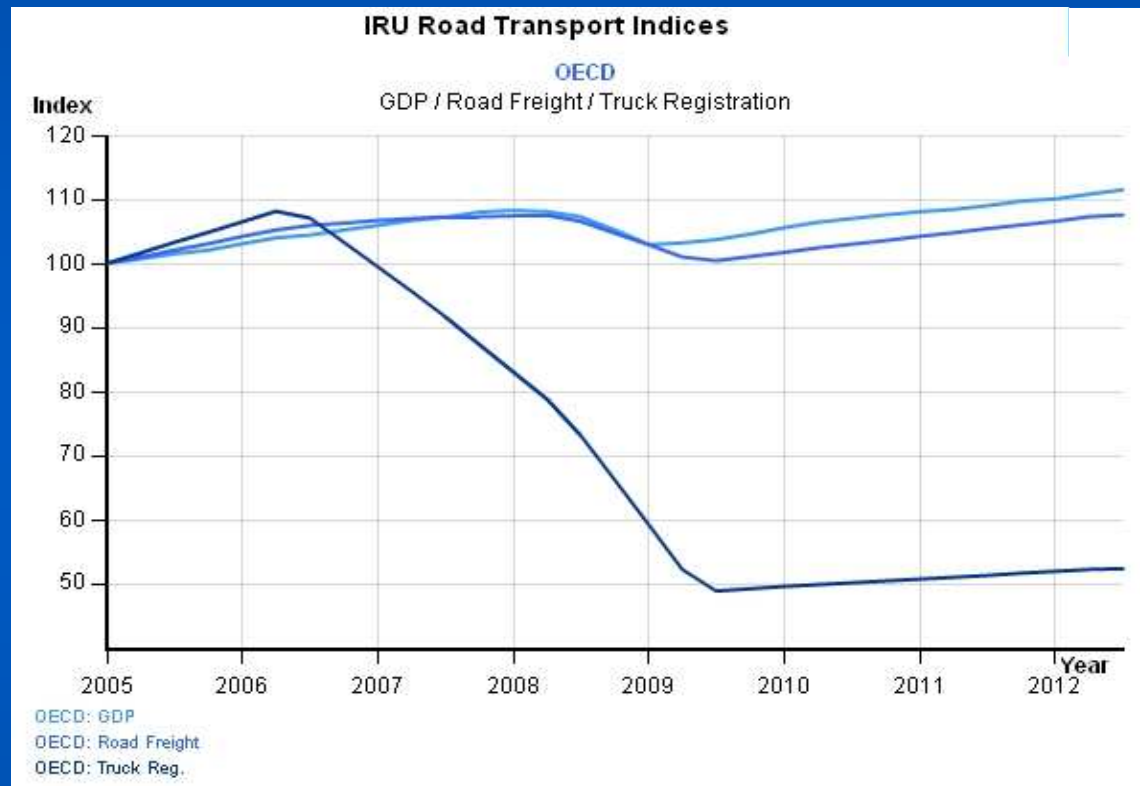
In 2010: +13.7% increase in registered vehicles



TRACECA Countries



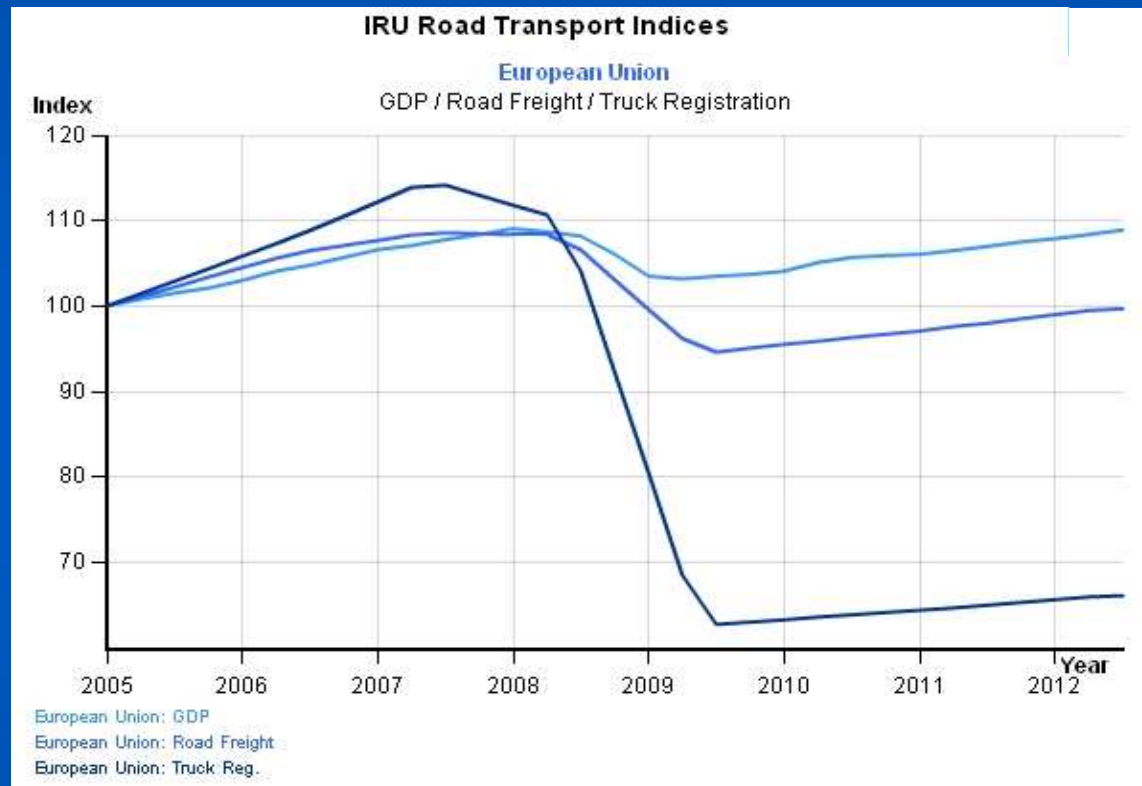
Continuous growth through and after crisis (+4.8% transported t.). New vehicle registrations rising again (+4.9%). Overall growth rate is lower than in BRIC



Reaching pre-crisis levels (transported t.)

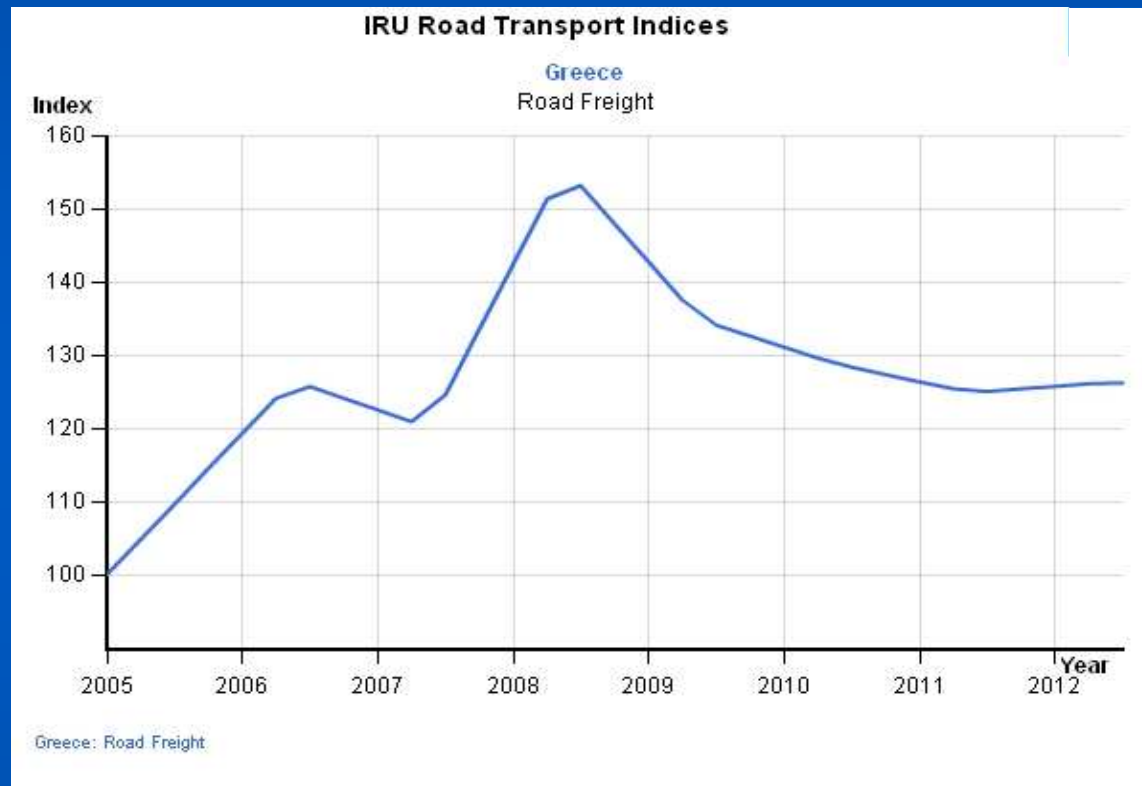
Dramatic drop in new vehicle registrations

=>Transporting the same amount but with an older fleet



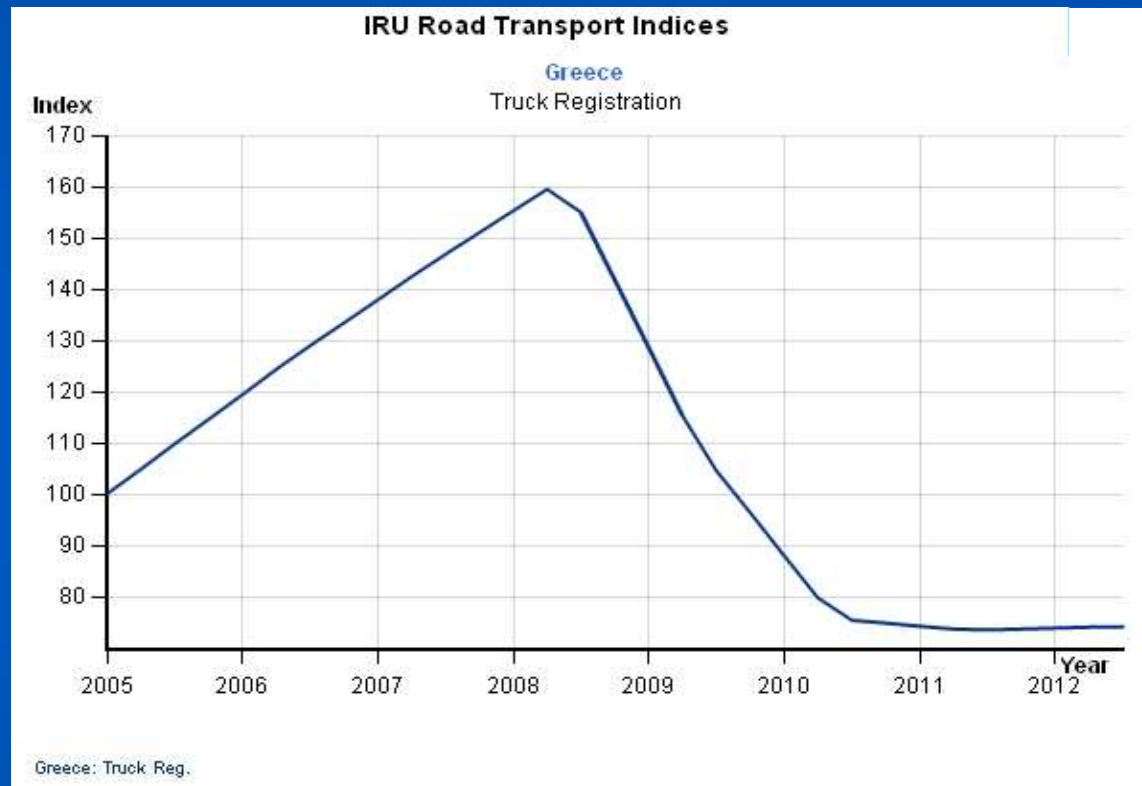
Recovering but still below pre-crisis levels

Pre/post crisis comparison (2008-11): -10.4% in transported t. and
42.4% in new vehicle registrations
=>Transporting less with an older fleet



Not recovering and below pre-crisis levels

Pre/Post crisis comparison (2008–11): -18% in transported t. In 2010: -3.6% decrease in transported t.



Not recovering and below pre-crisis levels

Pre/Post crisis comparison (2008–11): -53.8% in new vehicle registrations. In 2010: -15% decrease in new vehicle registrations



In Focus: Greece Challenges and Opportunities

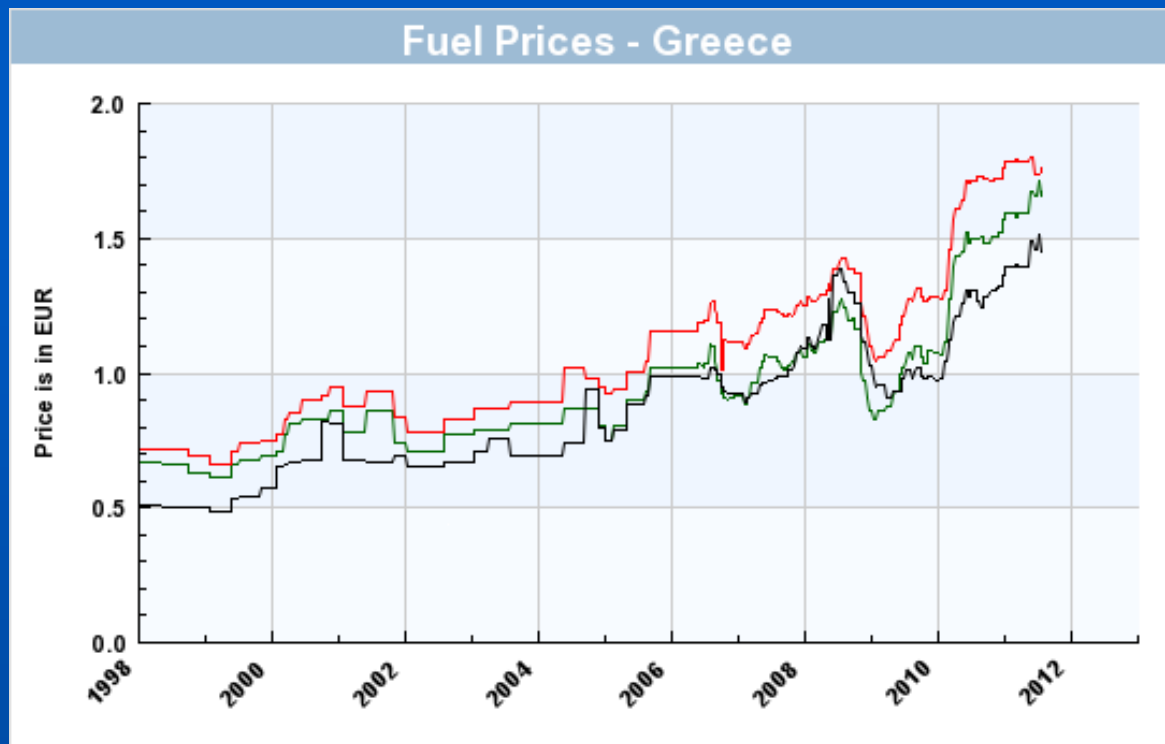
- ➔ Transport licence was necessary:
Investments of ~100,000 € (Licences were limited to 33,000. No additional licenses issued since 1970!)
- ➔ Financial crisis and economic slowdown made it hard to repay loan
- ➔ Since 2010: Liberalisation of road transport market lead to increase of competition and decrease value of licenses



In Focus: Greece


Challenges and Opportunities

- ➔ Austerity measures lead to increased taxes
- ➔ Increased fuel price





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

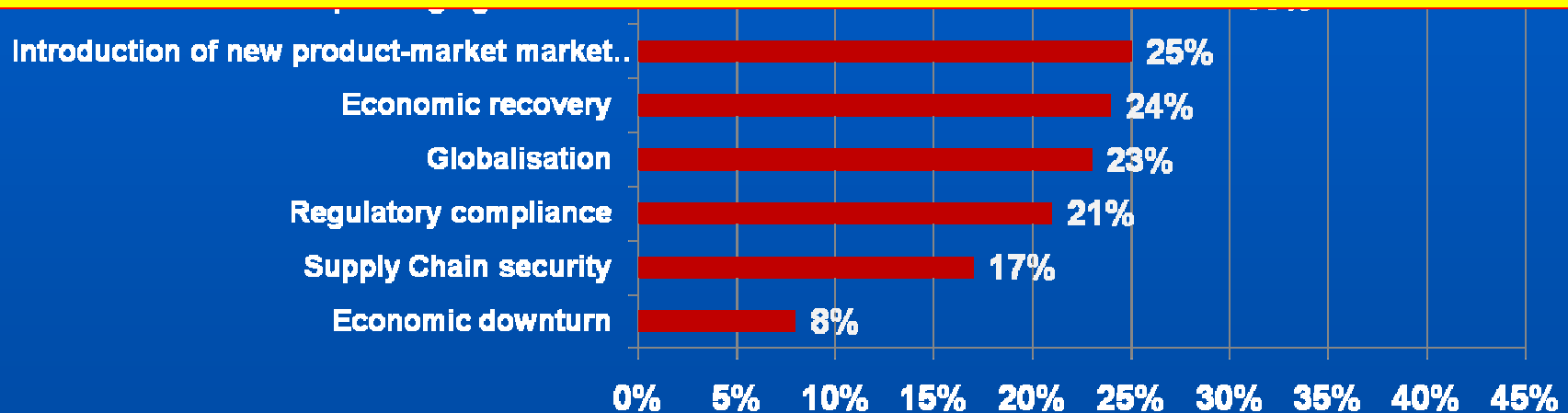
Key cost drivers in 2011 are fuel price, vehicle costs and labour costs

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Business Drivers 2011

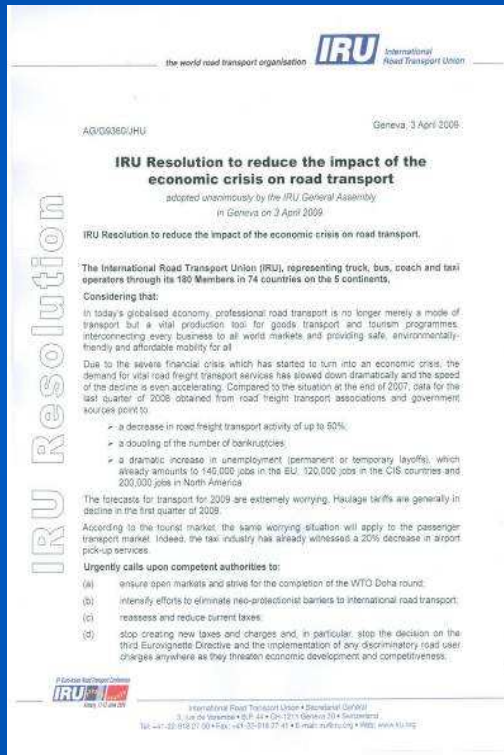
Market/Demand volatility 40%

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





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





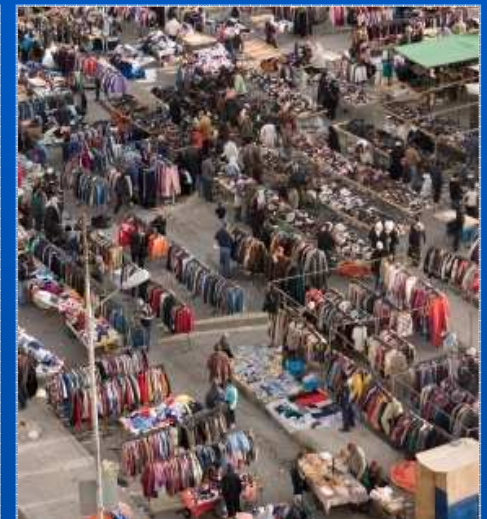
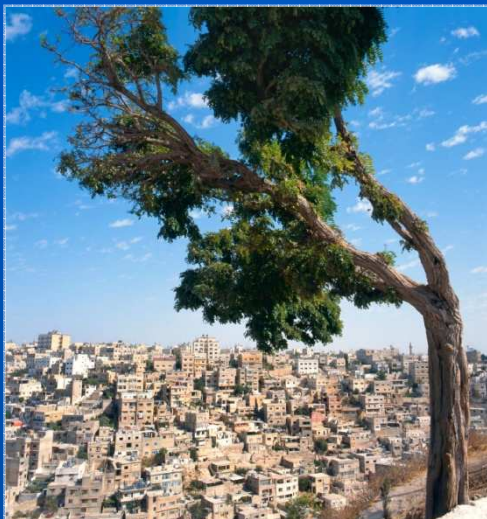
Save the date!



7th Euro-Asian Road Transport Conference & Ministerial Meeting



Amman, 13-14 June 2013





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*Working together
for a better future*



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