IRU

Selected recent statistics on road freight transport in Europe

A study by NEA Transport Research and Training, commissioned by the IRU
Geneva, June 2006

IRU Union Internationale des Transports Routiers

SELECTED ROAD TRANSPORT DATA

A study to update road transport statistics in Europe

Final report on goods road transport

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Introduction

Objective of the study

The International Road Transport Union has asked NEA Transport research and training to update a number of tables and figures in the 1999 IRU/NEI report on productivity in road transport. Beyond updating statistical information on goods road transport, as presented in the IRU/NEI 1999 study, NEA has been requested to add, to the extend possible and depending on the information available, similar information on passenger road transport by bus and coach (scheduled and unscheduled).

This report contains the results for goods road transport.

Methodology

Notwithstanding the fact of the increasingly integrating EU road transport market, timely, business friendly and comparable transport statistics at European level are not easy to collect, especially for road passenger transport. The obligation for EU Member States to collect statistics on goods road transport is covered by EU Directives, for road passenger transport such an EU obligation does not exist.

Furthermore, statistics on other related issues like size distribution of companies, profitability, bankruptcy and other indicators of the performance of the sector are missing on a European level.

Therefore in this study data is collected by surveys among IRU Member associations and national Ministries of Transport from ECMT member countries.

As far as bus and coach transport is concerned, additional data was collected by a short survey among participants of the 4th European Bus & Coach Forum, Kortrijk, Belgium, 21 October 2005, and by desk research. Sources checked include other NEA reports and studies, EUROSTAT, ACEA, ECMT, Central Statistical Bureau NL and ERF.

This report contains the results of the study for goods road transport. Where appropriate, the paragraphs first show the original table or figure from the IRU/NEI report, followed by an updated table/figure. In the tables and graphs as much as possible a distinction has been made between EU15 (the “old EU” countries), EU8 (the new Member States with the exception of Malta and Cyprus), and Non-EU countries (such as BG, RO, RUS, UA, SCG).

Questionnaire response

Table 1.3.1 shows the response of the survey among IRU Member Associations.

Table 1.3.1: *Survey response IRU members*

Goods transport		Passenger transport	
1	BE	1	BE
2	BG	2	BG
3	CZ	3	CZ
4	DE	4	DE
5	ES	5	HU
6	HU	6	LT
7	LT	7	MK
8	NL	8	RO
9	PL	9	TR
10	RO	10	UK
11	RUS	11	FIN
12	SE	12	AT
13	UK	13	CH
14	SCG	14	FR
15	UA		

Table 1.3.2 shows the response of the survey among Ministries of Transport in ECMT Member States.

Table 1.3.2: *Survey response ECMT Member States*

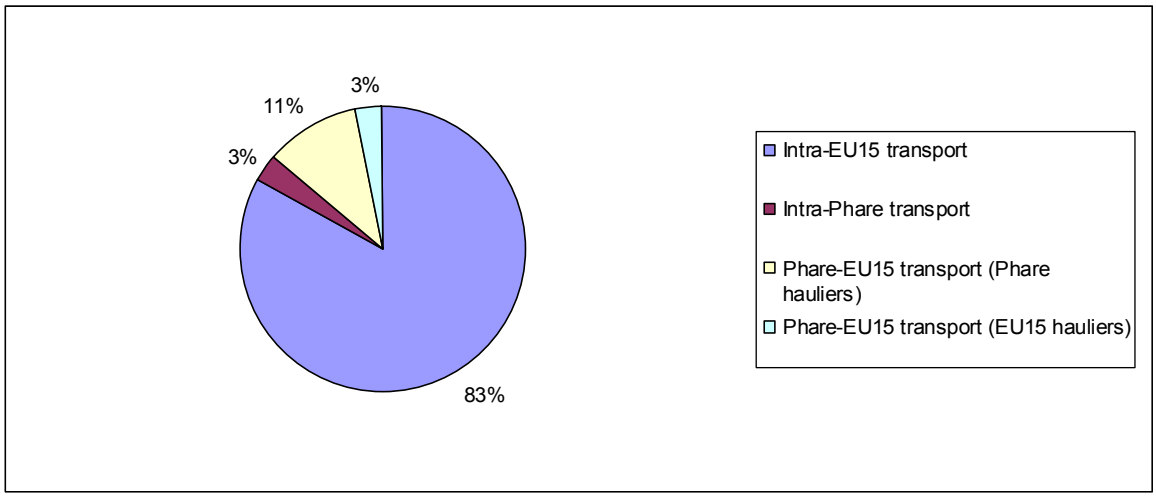
Goods and passenger transport	
1	ES
2	NL
3	SK
4	EST
5	HR
6	IS
7	LV
8	DE
9	UA
10	SE
11	LT

Goods road transport

Volume of international goods transport by road

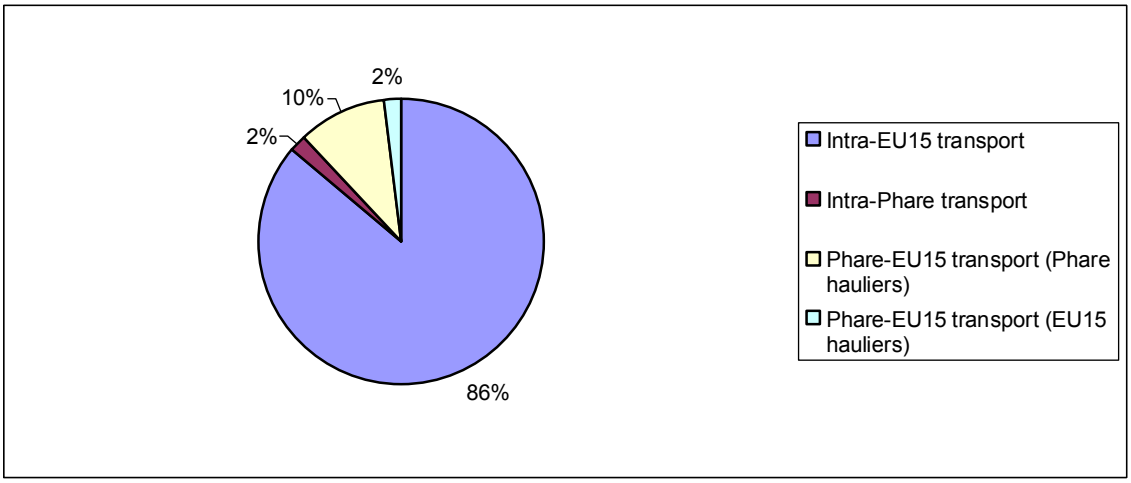
The following figures show where international road transport of goods takes place within Europe. Figure 2.1.1 shows the results of the IRU/NEI report, figure 2.1.2 the updated figures.

Figure 2.1.1: *Volume of international goods transport by road (tonnes), 1999 NEI*



NB: Phare countries include AL, BG, CZ, EST, HU, LV, LT, PL, RO, SK, SLO, MK.

Figure 2.1.2*: Volume of international goods transport by road (tonnes), 2005 NEA*



Source: The main features 2005-2015, TEN-STAC, NEA Transport research and training, 2005 / additional calculations NEA

NB: Phare countries include: EST, LV, LT, PL, CZ, SK, HU, SLO, BG, RO.

A comparison between the two graphs seems to indicate that the strongest growth was experienced in intra-EU15 transport. This however seems unlikely, because other sources indicate that especially transport between the EU15 and the new Member States showed strong growth figures. This seems to indicate that the figures used in 1999 were possibly not accurate[1].

Industry structure

Table 2.2.1 shows the size distribution of companies active in domestic and international goods road transport for hire and reward. The table shows the number of companies per size category, and the % share of the number of companies per size category in the total number of companies.

The last row of the table shows the average share per size category, which is also shown in figure 2.2.2.

Table 2.2.1 *Size distribution companies active in domestic and international goods road transport for hire and reward, 2004*

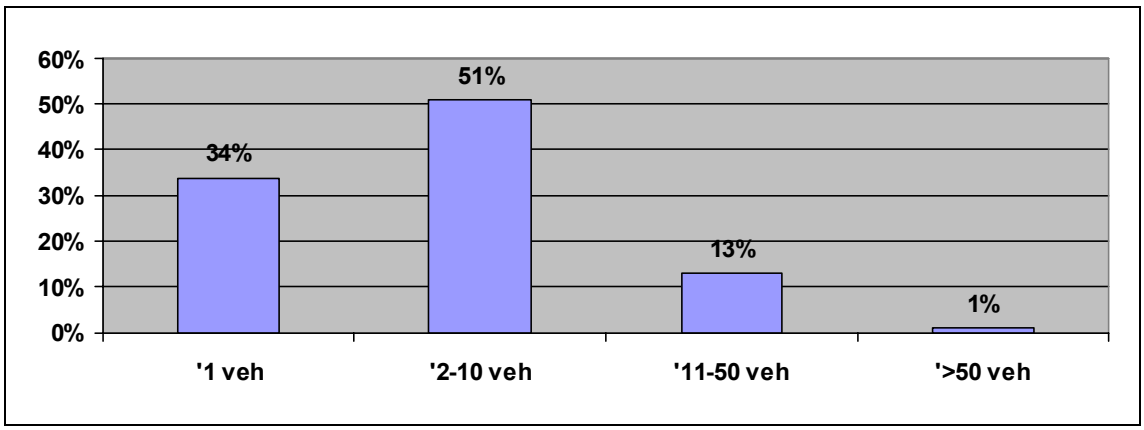
			Number of vehicles						
Countries	1	%	2-10	%	11-50	%	>50	%	Total
LT	960	29	1.908	57	422	13	38	1	3.328
SE	5.726	51	4.868	44	565	5	0	0	11.159
ES	82.210	54	54.064	35	15.871	10	421	0	152.566
DE	16.195	29	31.414	57	7.043	13	608	1	55.260
SK	3.836	37	5.760	56	633	6	58	1	10.287
NL	4.094	35	5.727	50	1.512	13	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

[1] Possibly the 1999 figures were taken from a pilot study in the Phare countries focused on collecting road goods transport data from hauliers.

Table 2.2.2 *Average size distribution in vehicles of companies active in domestic and international goods road transport for hire and reward, 2004*



Source: Questionnaire among IRU member associations and ministries of transport

Despite the fact that not all countries reported data on size distribution, the table gives a good indication of the industry structure. Overall some 34% of the companies have only one truck, 51% of the companies have 2 to 10 trucks, 13% has 11 to 50 trucks and 1% has more than 50 trucks.

Cost comparison EU8 / EU15 / CEE goods road transport

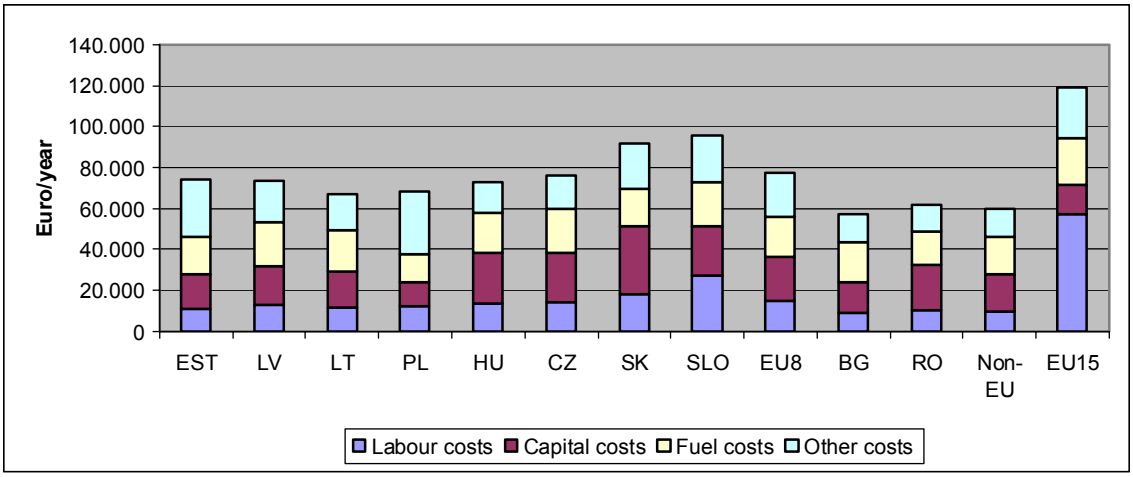
Figures 2.3.1 and 2.3.2 show the NEI results of a cost comparison between EU15 countries, EU8 countries (EU10 minus Cyprus and Malta) and Non-EU countries. The results of the NEI study were recalculated[2], using 4 categories:

- Labour costs (driver wages including social costs and reimbursed expenses)
- Capital costs (costs of depreciation and interest cost of vehicle)
- Fuel costs (including excise duties)
- Other costs (insurance, vehicle tax, repair and maintenance, tyres, overhead)

Figure 2.3.1 shows the total costs of a truck active in international transport per country, and the breakdown in cost categories.

[2] Some recalculations were made i.e. tolls/taxes were replaced by vehicle tax, overhead costs were included.

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*

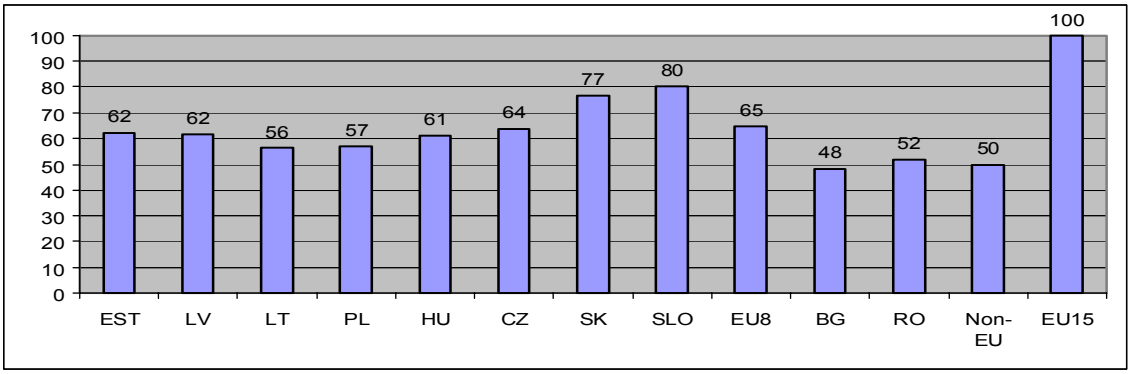


Figure 2.3.2 shows that average costs of EU8 hauliers were around 65% of costs of EU15 hauliers in 1998 according to NEI calculations. The costs of Non-EU hauliers (BG and RO) were 50% of the costs of EU15 hauliers. Driver costs are the main cause of cost differences.

To eliminate costs differences due to different mileages, figure 2.3.3 shows the total cost per kilometre in international goods road transport, and figure 2.3.4 shows the same with EU15=100.

Figure 2.3.3: *Total costs per kilometre in international goods road transport, NEI, 1998*

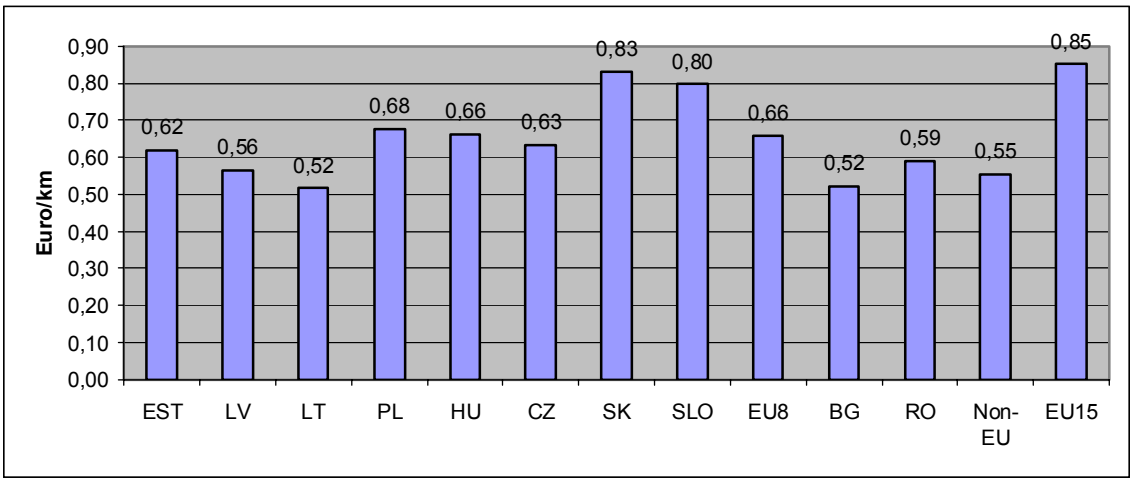
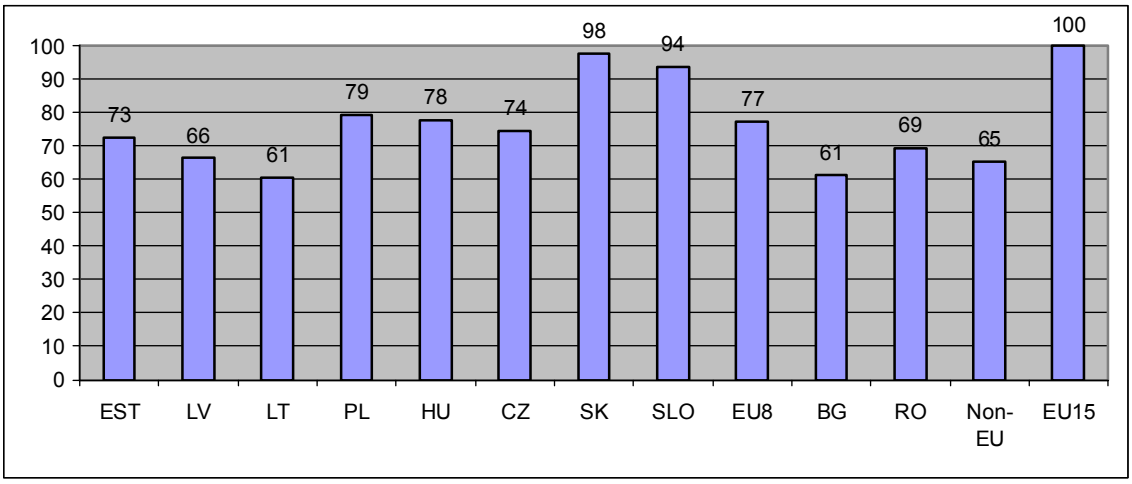


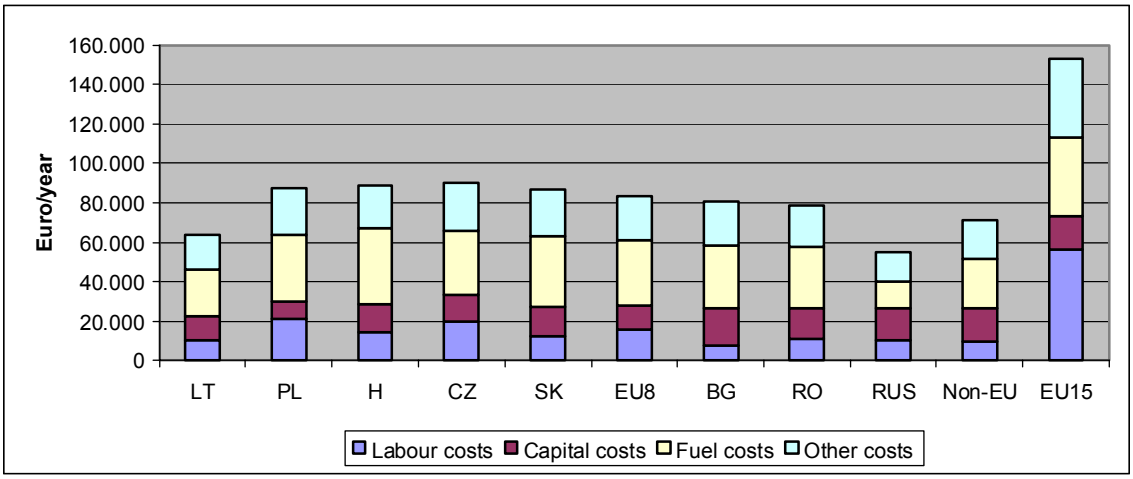
Figure 2.3.4: *Total costs per kilometre in international goods road transport, NEI, 1998, EU15=100*



Because on average the number of kilometres per year of EU15 hauliers is higher than the yearly mileage of EU8 and Non-EU hauliers, the cost difference becomes smaller when expressed in costs per kilometre (EU8=77% and Non-EU=65%). Remarkable are the high costs per kilometre in Slovakia. This NEI result does not seem very convincing.

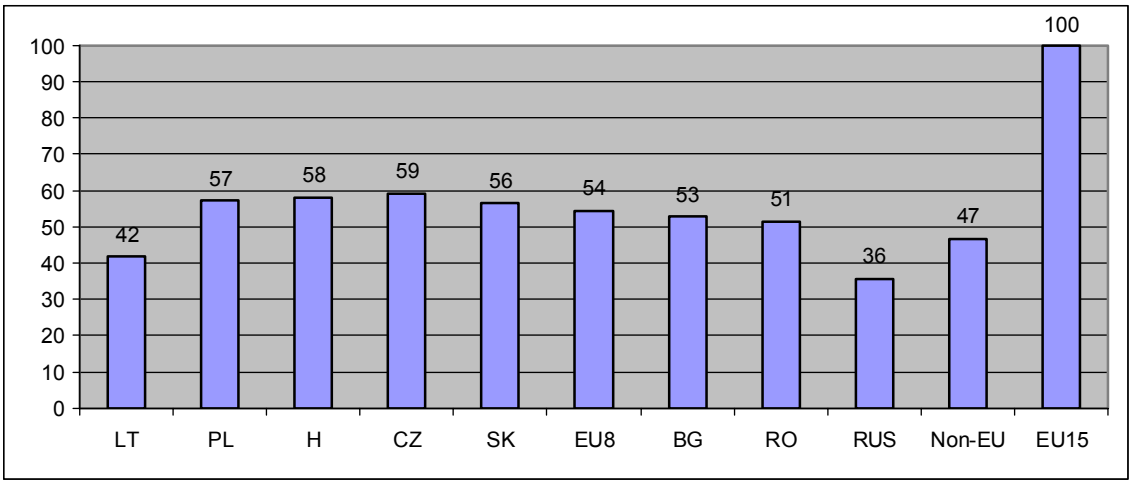
Figure 2.3.5 shows the results of the questionnaire sent to the relevant IRU Member associations. The data has been supplemented with data from other NEA studies on costs structures in European road transport. Figure 2.3.6 shows the same, but with EU15=100.

***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.

Figure 2.3.6 shows that average costs of EU8 hauliers were around 54% of costs of EU15 hauliers in 2004. A comparison with the situation in 1998 seems to indicate that the cost differences between EU15 hauliers and hauliers from the EU8 countries have increased.

Figure 2.3.7 shows the results expressed in total costs per kilometre, and figure 2.3.8 shows the same with EU15=100.

***Figure 2.3.7**: Total cost per kilometre in international goods road transport, NEA, 2004*

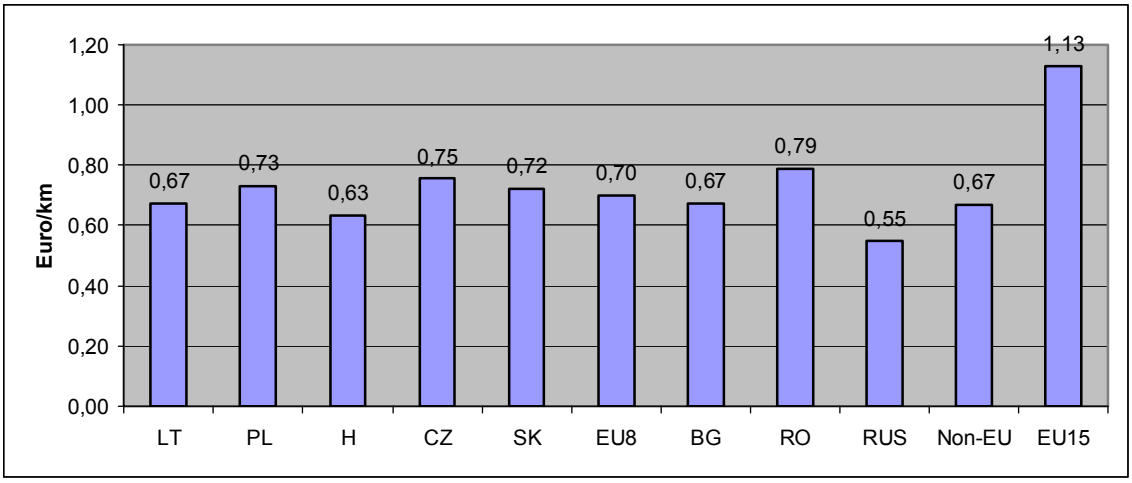
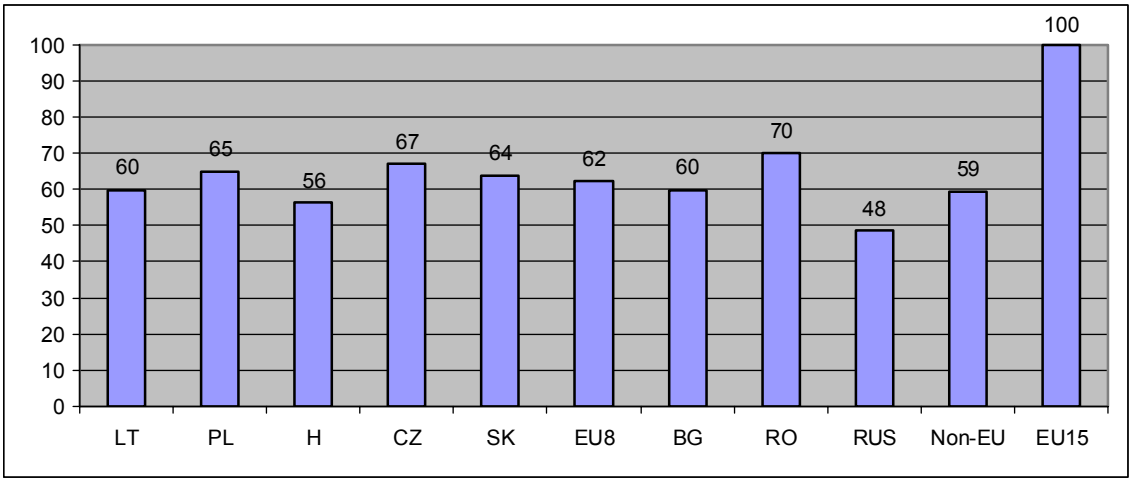


***Figure 2.3.8**: Total cost per kilometre in international goods road transport, NEA, 2004, EU15=100*



Expressed in costs per kilometre the costs of EU8 hauliers are 62% of the costs of EU15 hauliers. The costs of Non-EU hauliers (Russia included) are 59% of the costs of EU15 hauliers.

Remarkable is the position of Romania. This can be explained by the relatively low mileage of Romanian hauliers compared to other hauliers.

Developments 1998-2004

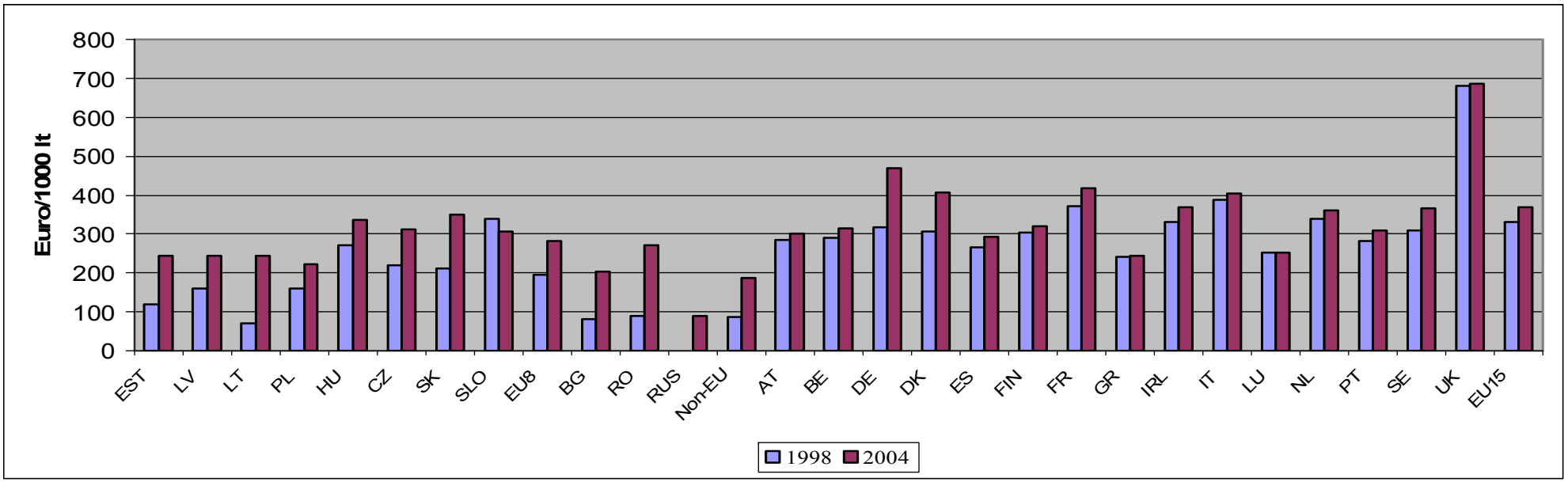
A comparison between the NEI results and the results of this study for 2004 learns that:

- Total costs of EU15 hauliers increased with more than 28%, mainly due to fuel costs.
- Total costs of EU8 hauliers increased with more than 11%, mainly caused by fuel costs. Cost savings were made in depreciation (-41%), interest (-47%), tyres (-22%) and overhead costs (-17%). Driver costs increased with 11%.
- Cost differences between EU15 and EU8 and Non-EU hauliers have increased.
- Total cost per kilometre of EU15 hauliers increased with 33%, while total cost per kilometre of EU8 hauliers increased with 6%, and total costs per kilometre of Non-EU hauliers increased with almost 22%.

Diesel fuel taxation levels

Figure 2.4.1 shows the excise duty on diesel in Euro/1000 litres taken from the NEI report 1998 (CEEC) supplemented with data on the EU15 countries on the basis of TLN[3] reports 1998, and data taken from ACEA[4] showing the situation in May 2004.

***Figure 2.4.1**: Excise duty on diesel, Euro/1000 litres, 1998 and 2004*



Source: NEI report, Questionnaire, ACEA, TLN

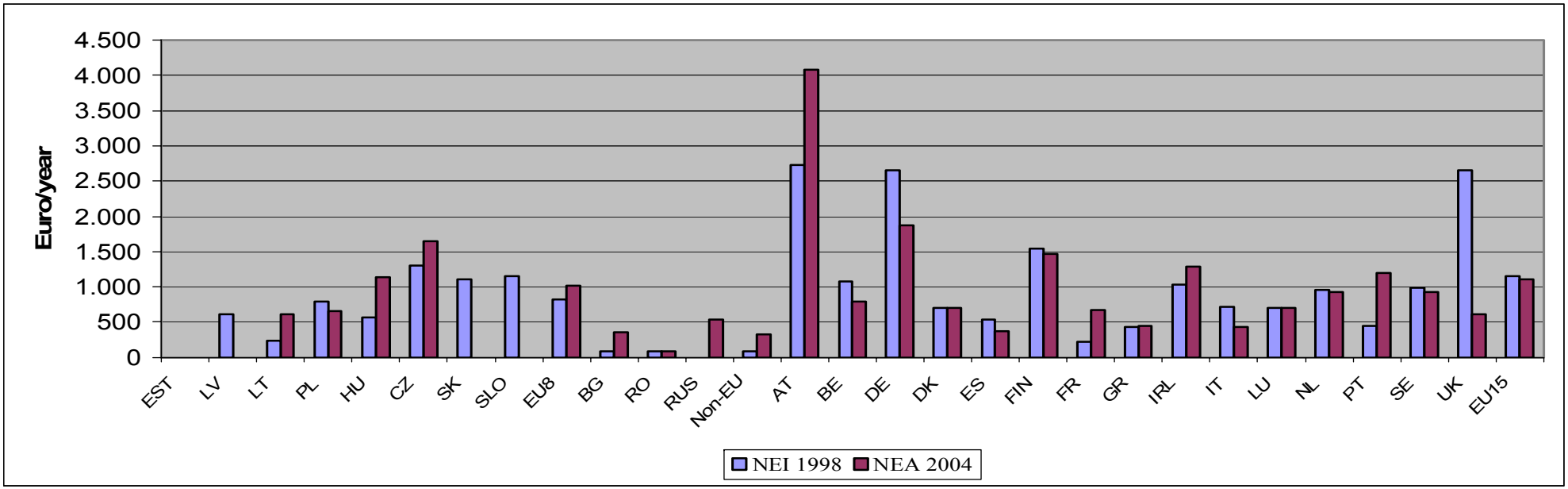
[3] Transport en Logistiek Nederland

[4] ACEA = European Automobile Manufacturers Association

Annual vehicle taxation

Figure 2.5.1 shows the results on vehicle taxation (taxation on ownership) in Euro per year for an articulated vehicle of 40 tonnes total weight. The graph shows the 1998 NEI results supplemented with data taken from TLN reports for 1998. Most of the updated results were taken from ACEA because of the low survey response.

***Figure 2.5.1**: Vehicle taxation, articulated NEI 1998 and NEA 2004*



Source: NEI report, ACEA, TLN.

Yearly kilometres in goods road transport

The following figures show yearly kilometres of trucks in international road goods transport. Figure 2.6.1 shows the NEI figures, and figure 2.6.2 shows the results of the NEA questionnaire

Figure 2.6.1: *Yearly kilometres per truck in international goods transport, NEI, 1998*

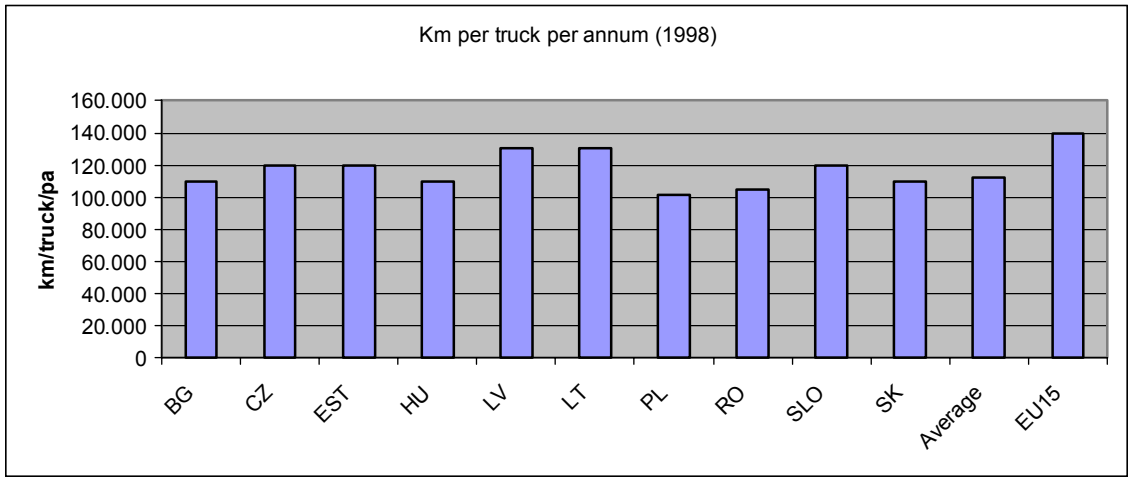
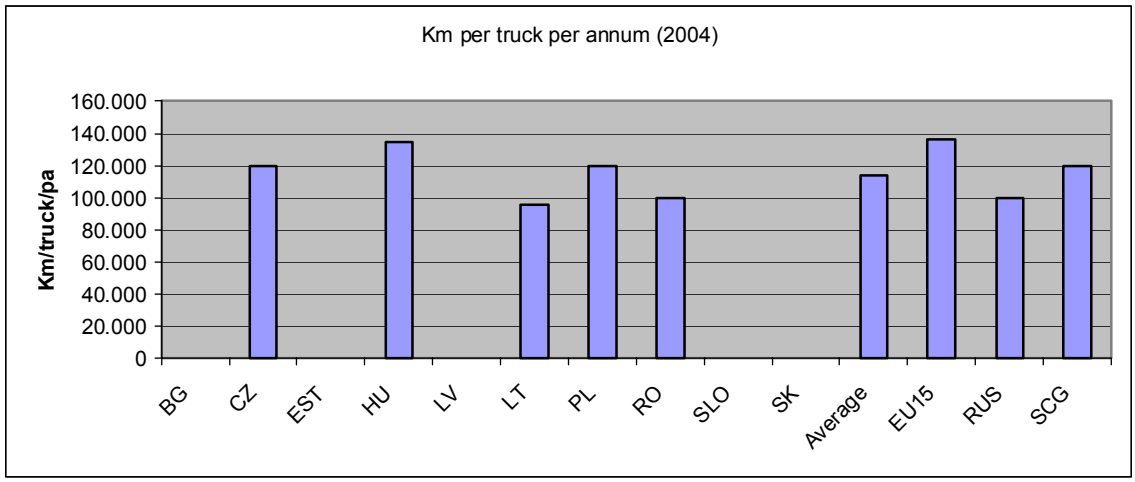


Figure 2.6.2*: Yearly kilometres per truck in international transport, NEA, 2004*



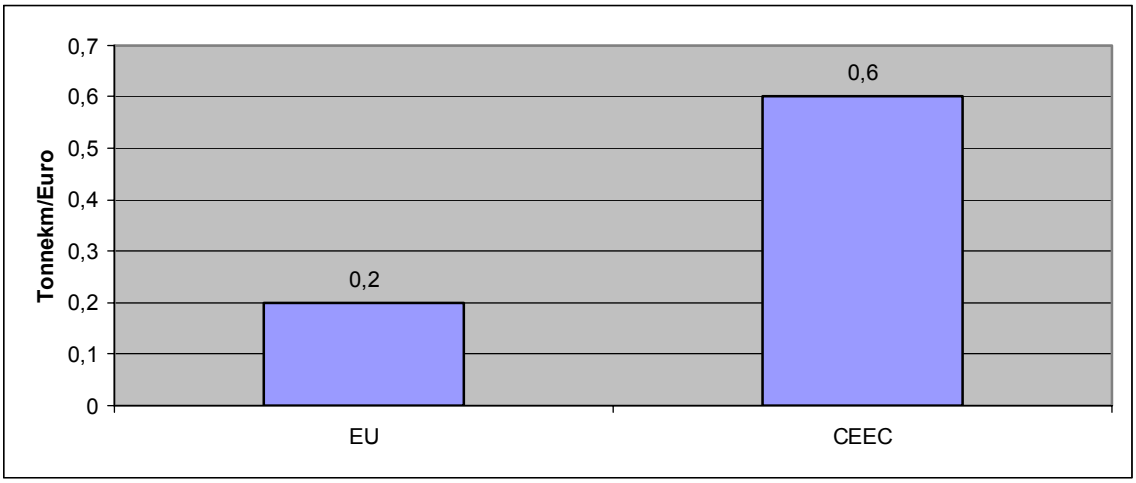
Source: Questionnaire among IRU members associations, Cost comparison and cost developments in the European road haulage sector, NEA Transport research and training, 2005.

Bearing in mind that the response rate on the question about yearly kilometres of trucks was rather low, the figures seems to indicate that the number of kilometres driven per year has only slightly changed. However, firm conclusions cannot be drawn because factors like the geographical market segments where trucks operate have a very big influence on the performance of trucks.

Freight intensities road transport

Freight transported is related to the level of economic development. This correlation can be seen, by analyzing the development of tonne-kilometres of freight transport and the level of Gross Domestic Product (GDP) in various countries. Figure 2.7.1 shows the results of the NEI study for road transport.

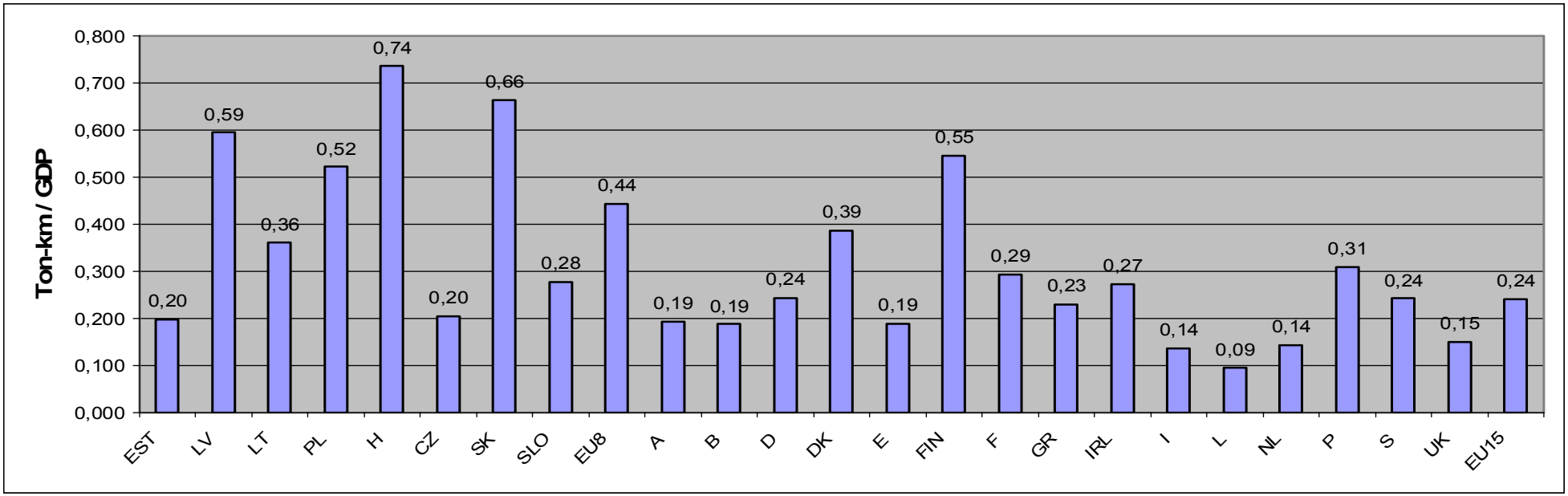
***Figure 2.7.1**: Freight transport intensities (road transport, tonne-km/GDP), NEI, 1995*



The CEEC ratio is significantly (three times) higher than that of the EU, suggesting still existing low-value and high-volume oriented trade and manufacturing processes, inefficient spatial production structures, and artificial low prices of formally planned economies.

On the next page the updated results are presented per country and group of countries. Tonne-kilometres are tonne-kilometres within the country.

Figure 2.7.2: *Freight transport intensities (road transport, tonne-km/GDP), NEA, 2002*



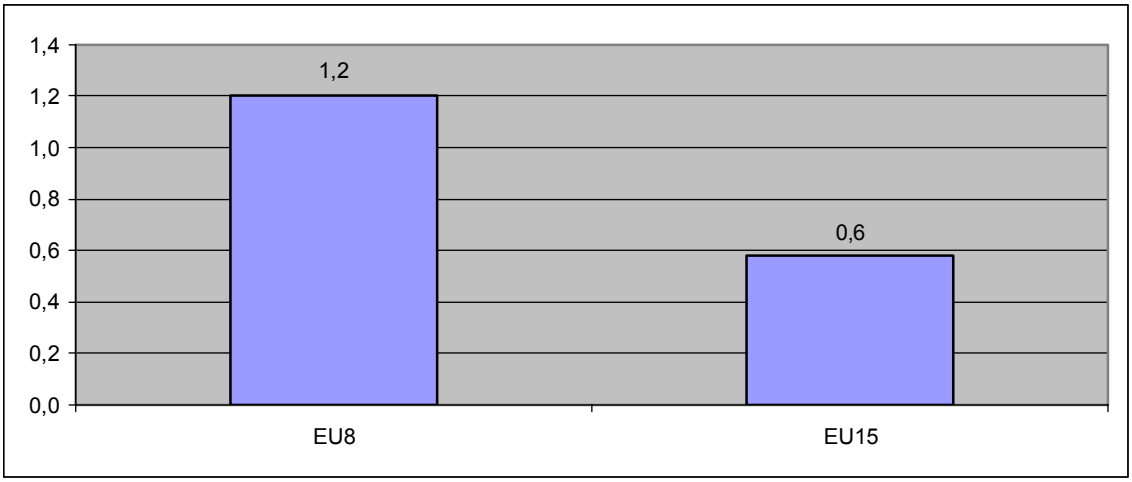
Source: NEA calculations based on the results of the TEN-STAC study and using the NEAC Model

The EU8 freight intensity in figure 2.7.2 in 2002 is 0.44. This level compared with the NEI figure of 0.6 in 1995 indicates the changing economic structure in the new EU Member States.

Average profitability goods road transport

Via the questionnaire sent to IRU member associations an attempt has been made to get an insight in the profitability of the sector. Figure 2.8.1 shows the results of the answers of 10 associations.

Figure 2.8.1: *Profitability in international goods road transport as a % of total turnover, 2004*



Source: Questionnaire among IRU member associations

The lowest profitability measured was found in The Netherlands, where NEA measured profits of -3,3% in international road goods transport.

Bankruptcies in goods road transport

Table 2.9.1*: Number of bankruptcies in goods road transport, 2004*[5]

Country	Number of bankruptcies
LT	16
D	1549
S	176
B	174
NL	106

Source: Questionnaire

The relatively low number of bankruptcies in The Netherlands in relation to the very low profitability can be explained as follows.

[5] Data on Sweden is from 2003.

Firstly, the profitability of -3,3% includes the costs of equity, the costs of family members working for but not included on the pay-list of the company, and it includes a standardized income for the owner/manager of the company based on the number of vehicles.

Therefore annual reports of companies might show a profit, while in reality, when all costs are included on the basis of sound business economic principles, the firm might have a loss.

Secondly, small road transport companies rarely go bankrupt because the owners/managers of such companies often take a relatively low salary - compared to the hours of work put in - and only need to worry about paying the lease each month. Earlier NEA research[6] has shown that self-employed drivers usually exit the market because of disappointing financial results and very rarely because of bankruptcy.

[6] The socio-economic position of the self-employed driver, NEA 1998

Profitability and bankruptcies in other industries

Additional to the update of the NEI figures, a small research was carried out regarding profitability and bankruptcies in other sectors compared to road goods transport. Because of the availability of data the research was focused on The Netherlands. Table 2.10.1 shows the results.

Table 2.10.1: *Profitability in other industries, profit as a percentage of total turnover, 2003*

Manufacturing, office machines	-3,17		Manufacturing, paper etc	5,05		Manufacturing, chemical products	7,28
Manufacturing, transport equipment..	1,36		Manufacturing, cars.	5,10		Architecture, engineering	7,51
Travel agencies	1,70		Retails, books	5,18		Hotels etc	7,84
Import passenger cars	1,73		Employment agencies	5,28		ICT	8,20
Fuels service stations	1,75		Local express / mail services	5,38		Retail, car parts	8,27
Air transport	2,02		Manufacturing, textiles	5,63		Other business services	9,24
Car dealer	2,61		Retail, furniture	5,77		Restaurants	9,92
Retail, household appliances	2,95		**Trams, buses & coaches**	**5,98**		**Taxi companies**	**10,35**
Super markets	3,11		Retail, other	6,04		Advertising agencies	11,69
Retail, food	4,00		Retail, cosmetics	6,09		Market survey	14,51
Sea transport	4,42		Construction / installation	6,19		Textile cleaning	17,07
Freight forwarding.	4,70		Retail, non-food	6,69		Accountancy	17,28
Manufacturing, metal	4,71		Retail, clothing	6,71		Telecommunication	18,62
Manufacturing, food	4,77		Manufacturing, furniture	6,71		Airports and related	18,75
Road goods transport hire & reward	**4,90**		Warehousing	7,08		Inland waterways	19,59

NB. NEA calculations show a profitability in 2003 in Dutch domestic road goods transport for hire and reward of – 0.5%, and in Dutch international road goods transport for hire and reward of -2.0%. The difference is caused by a different methodology (calculation of costs of equity, calculation of costs of personnel not included on the pay-list, recalculation of reward for entrepreneurship), and caused by a the fact that the official CBS figures include only larger companies.

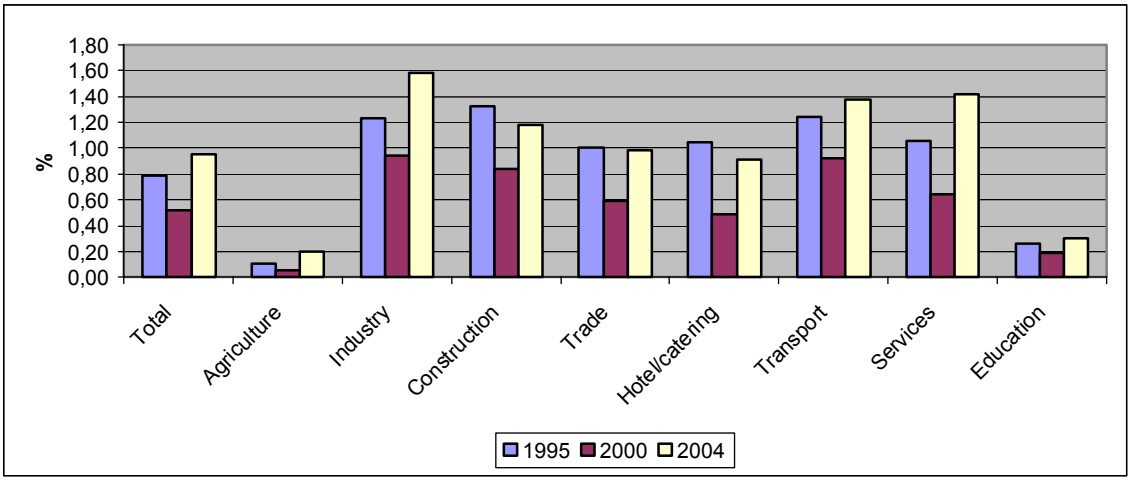
The table shows that the goods road transport sector is not very profitable compared to other industries but the situation does not seem to be dramatic.

An additional analysis was carried out comparing the developments in profitability in the period 2000 to 2003. The results show that the situation in road goods transport is not developing worse than in other industries.

Bankruptcies in other industries

Figure 2.10.2 shows the number of bankruptcies as a percentage of the total number of companies active in the corresponding sector.

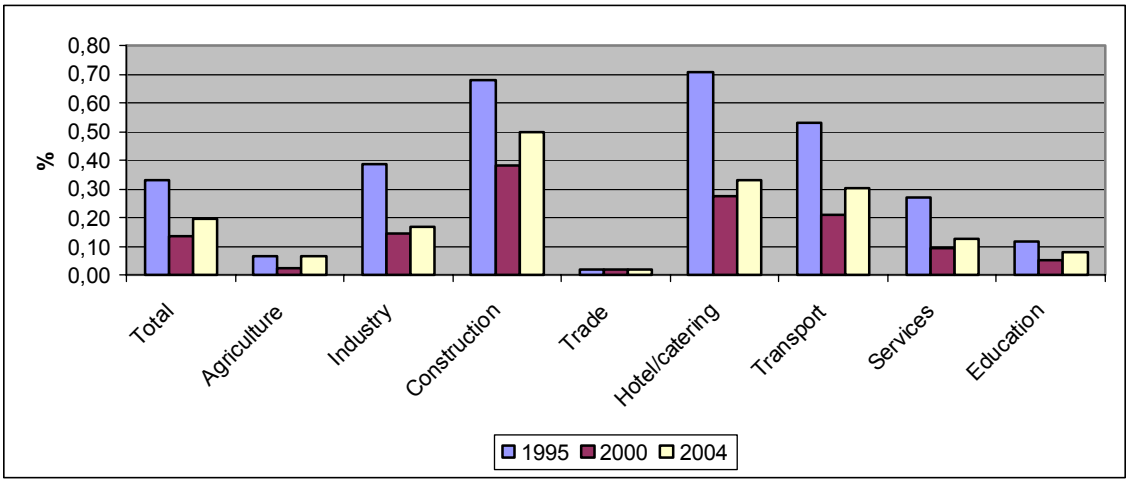
Figure 2.10.2 *Bankruptcies as a % of the total number of companies active in a sector, NL*



Source: CBS

Figure 2.10.2 shows that the number of bankruptcies in transport as a percentage of the total number of companies active in the sector is higher than the average, but in 2004 this figure was higher for the sectors Industry and Services.

Figure 2.10.3*: Bankruptcies of one-man businesses as a % of total companies active in the sector, NL*



Source: CBS

Figure 2.10.3 shows that the number of bankruptcies in transport as a percentage of the total number of companies active in the corresponding sector is relatively high, but lower than in the construction and the hotel/catering sector.

The comparison with other industries shows that profitability in transport is relatively low and bankruptcy relatively high, but the figures don't show that the economic situation in the sector is much worse than in other sectors.

ANNEX 1 Data source of tables and figures

Figure 2.1.1& Figure 2.1.2: *Volume of international goods transport by road (tonnes), 1999 and 2004*

	NEI 1999	NEA 2004
Intra-EU15 transport	83%	86%
Intra-Phare transport	3%	2%
Phare-EU15 transport (Phare hauliers)	11%	10%
Phare-EU15 transport (EU15 hauliers)	3%	2%
	100%	100%

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

Euro	EST	LV	LT	PL	HU	CZ	SK	SLO	EU8	BG	RO	Non-EU	EU15
Labour costs	11.097	12.797	11.755	12.300	13.600	14.600	18.000	27.000	15.144	8.820	10.100	9.460	57.040
Capital costs	16.624	19.171	17.609	11.900	25.000	23.600	33.200	24.300	21.426	14.996	22.700	18.848	14.560
Fuel costs	18.726	21.595	19.836	13.300	19.100	21.400	18.500	21.800	19.282	19.624	16.000	17.812	22.480
Other costs	27.649	19.806	17.862	30.690	15.060	16.400	21.820	22.650	21.492	13.750	13.180	13.465	25.100
Total	74.096	73.369	67.062	68.190	72.760	76.000	91.520	95.750	77.343	57.190	61.980	59.585	119.180

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

Euro	EST	LV	LT	PL	HU	CZ	SK	SLO	EU8	BG	RO	Non-EU	EU15
EU15=100	62	62	56	57	61	64	77	80	65	48	52	50	100

Figure 2.3.3: *Total costs per kilometre in international goods road transport, NEI, 1998*

Euro	EST	LV	LT	PL	HU	CZ	SK	SLO	EU8	BG	RO	Non-EU	EU15
Total/km	0,62	0,56	0,52	0,68	0,66	0,63	0,83	0,80	0,66	0,52	0,59	0,55	0,85

Figure 2.3.4: *Total costs per kilometre in international goods road transport, NEI, 1998, EU15=100*

Euro	EST	LV	LT	PL	HU	CZ	SK	SLO	EU8	BG	RO	Non-EU	EU15
EU15=100	73	66	61	79	78	74	98	94	77	61	69	65	100

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

	LT	PL	H	CZ	SK	EU8	BG	RO	RUS	Non-EU	EU15
Labour costs	10.574	20.910	14.700	19.677	12.200	15.612	7.860	10.750	10.480	9.697	56.208
Capital costs	11.701	9.274	13.710	13.559	15.096	12.668	18.489	15.792	16.062	16.781	17.150
Fuel costs	23.874	33.462	39.032	32.640	35.640	32.930	31.680	31.050	13.300	25.343	39.568
Other costs	17.864	23.998	21.418	24.666	23.439	22.277	22.775	21.140	14.782	19.566	40.311
Total	64.013	87.645	88.860	90.542	86.375	83.487	80.804	78.732	54.624	71.387	153.237

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

	LT	PL	H	CZ	SK	EU8	BG	RO	RUS	Non-EU	EU15
EU15=100	42	57	58	59	56	54	53	51	36	47	100

Figure 2.3.7*: Total cost per kilometre in international goods road transport, NEA, 2004*

	LT	PL	H	CZ	SK	EU8	BG	RO	RUS	Non-EU	EU15
Total/km	0,67	0,73	0,63	0,75	0,72	0,70	0,67	0,79	0,55	0,67	1,13

Figure 2.3.8*: Total cost per kilometre in international goods road transport, NEA, 2004, EU15=100*

	LT	PL	H	CZ	SK	EU8	BG	RO	RUS	Non-EU	EU15
EU15=100	60	65	56	67	64	62	60	70	48	59	100

***Figure 2.4.1**: Excise duty on diesel, Euro/1000 litres, 1998 and 2004*

	EST	LV	LT	PL	HU	CZ	SK	SLO	EU8	BG	RO	RUS	Non-E	AT	BE	DE	DK	ES	FIN	FR	GR	IRL	IT	LU	NL	PT	SE	UK	EU15
1998	120	160	70	160	270	220	210	340	194	80	90		85	283	290	317	307	266	304	372	240	330	388	253	340	282	308	680	331
2004	245	245	245	222	335	312	351	307	283	202	271	88	187	302	315	470	406	294	319	417	245	368	403	253	360	308	367	688	368

***Figure 2.5.1**: Vehicle taxation, articulated NEI 1998 and NEA 2004*

		EST	LV	LT	PL	HU	CZ	SK	SLO	EU8	BG	RO	RUS	Non-EU
Articul	NEI 1998		610	230	790	560	1.300	1.100	1.150	820	89	80		85
Articul	NEA 2004			609	660	1.140	1.645			1.014	353	83	535	324

AT	BE	DE	DK	ES	FIN	FR	GR	IRL	IT	LU	NL	PT	SE	UK	EU15
2.731	1.073	2.650	704	536	1.546	214	430	1.031	708	694	955	440	994	2.656	1.157
4.080	791	1.879	705	374	1.469	671	439	1.282	435	696	928	1.200	928	618	1.100

***Figure 2.6.1:** Yearly kilometres per truck in international goods transport, NEI, 1998*

Country	BG	CZ	EST	HU	LV	LT	PL	RO	SLO	SK	Average	EU15
Km per tru	110.000	120.000	120.000	110.000	130.000	130.000	101.000	105.000	120.000	110.000	112.300	140.000

***Figure 2.6.2**: Yearly kilometres per truck in international transport, NEA, 2004*

Country	BG	CZ	EST	HU	LV	LT	PL	RO	SLO	SK	Average	EU15	RUS	SCG
Km per truck per ann		120.000		135.000		95.191	120.000	100.000			114.038	136.000	100000	120000

Figure 2.10.2 *Bankruptcies as a % of the total number of companies active in a sector, NL*

	1995	2000	2004
Total	0,79	0,52	0,95
Agriculture	0,10	0,05	0,20
Industry	1,23	0,94	1,58
Construction	1,32	0,84	1,18
Trade	1,00	0,59	0,99
Hotel/catering	1,04	0,49	0,91
Transport	1,24	0,92	1,37
Services	1,06	0,64	1,42
Education	0,26	0,19	0,30

Figure 2.10.3*: Bankruptcies of one-man businesses as a % of total companies active in the sector, NL*

	1995	2000	2004
Total	0,33	0,14	0,20
Agriculture	0,06	0,02	0,06
Industry	0,39	0,14	0,17
Construction	0,68	0,38	0,50
Trade	0,02	0,02	0,02
Hotel/catering	0,71	0,27	0,33
Transport	0,53	0,21	0,30
Services	0,27	0,10	0,13
Education	0,12	0,05	0,08

ANNEX 2 Questionnaires

Questionnaire IRU Member associations

IRU QUESTIONNAIRE "UPDATING ROAD TRANSPORT DATA"

GOODS TRANSPORT

1 Objective of this IRU/NEA questionnaire is to update information on European road **goods** transport companies, and especially information on costs, cost structures, productivity and size distribution of these companies.

2 All questions refer to the year **2004**. If your information is from earlier years, please do fill in the tables and indicate the year the information refers to.

3 IRU and NEA realise that some questions are difficult to answer, especially questions about costs. A practical approach would be to send the tables about average number of kilometres, tonne-kilometres, profitability and costs to a selected sample of your members (a few small ones, middle sized and large companies) in order to receive an appropriate estimated average value.

Respondents are kindly asked to fill in the questionnaire and send it back to NEA BEFORE APRIL 30, 2005, preferably using email. The email address is : kwe@nea.nl. Alternatively, fax or send in by mail to the fax number / post address mentioned below.

For further information please contact:

- NEA Transport research and training, Mr Klaas Westerkamp, P.O.Box 1969, 2280 DZ Rijswijk, The Netherlands, tel +31 70 3988412, fax +31 70 3988426, email kwe@nea.nl
- IRU, Mr Peter Krausz, 3, Rue de Varembé, B.P. 44, CH – 1211 Geneva 20, tel +41 22 9182710, email peter.krausz@iru.org.

1. Contact details.

Name responding person	
Association name	
Email address	
Country	

2. Size distribution of road goods transport companies (domestic / international)

a Please indicate per size category the number of companies active in domestic / international transport, or at least the breakdown in % and the total number of companies.

b If you have information according to other size categories, please make an estimate according to the size categories in the table.

Size category (number of tractors and lorries)	Number of companies (licence holders)		% of companies		Number of vehicles		% of vehicles	
	Domestic	Inter-national	Domestic	Inter-national	Domestic	Inter-National	Domestic	Inter-National
1			%	%			%	%
2 – 10			%	%			%	%
11 – 50			%	%			%	%
>50			%	%			%	%
Total			100%	100%			100%	100%

4. Diesel fuel taxation in local currency and EURO

The diesel fuel taxation per litre is	Local currency	
	EURO	
Please indicate the date to which your answer refers	Date (dd/mm/yyyy)	

5. Vehicle taxation per vehicle per year in local currency and EURO

Rigid truck (40 tonnes)	Local currency	
	EURO	
Articulated truck (tractor + semi-trailer, 40 tonnes)	Local currency	
	EURO	
Please indicate the date to which your answer refers	Date (dd/mm/yyyy)	

6. Average number of kilometres per vehicle per year in international transport

What is the average number of kilometres per year of a 40 tonnes vehicle used in international transport?	

7. Average number of tonne-kilometres per vehicle per year in international transport

What is the average number of tonne-kilometres per year of a 40 tonnes vehicle used in international transport?	

8. Average profitability in international road goods transport

Please indicate an estimate of the profitability (total revenue minus total costs as a percentage of total costs). Example: if total revenue would be 110 and total cost 100, the profitability would be (110-100)/100 = 0.1 = 10%

We estimate the average profitability in international road goods transport at (%)	%

9. Number of bankruptcies in road goods transport

Please indicate, and preferably per size category, the number of companies that went bankrupt during the last year, or if you only have information from previous years the number of bankruptcies and the corresponding year. If you don't have these figures per size category, please indicate the total.

Size category (number of tractors and lorries)	Number of companies that went bankrupt
1	
2 – 10	
11 – 50	
> 50	
Total	

10. Data cost calculation

Please fill in the next table on the basis of a non-specialised 40 tonnes articulated vehicle (tractor and semi-trailer), being most used in international transport. Try to fill in average values for your country.

On the left side of the table please fill in the data for the tractor, and in the right side the data for the semi-trailer.

Tractor Data	EURO	Semi Trailer Data	EURO
New value tractor		New value semi-trailer	
Residual value		Residual value	
Nr of years in use		Nr of years in use	
Price per tyre (average)		Price per tyre (average)	
Total km per tyre (average)		Total km per tyre (average)	
Insurance costs per year		Insurance costs per year	
Repair & Maintenance costs per year		Repair & Maintenance costs per year	

Costs per year for vignette, road users charges, road tolls			
Fuel use per 100 km			
Average fuel price per litre			
Yearly kilometres			
Other costs per year (excluding indirect costs)			
General Data	**EURO**	**Driver Data**	**EURO**
Interest rate		Driver costs per year (wages, taxes, social charges excl. daily allowance)	
Overhead as a % of total costs (or fill in an amount below)		Daily allowance costs per year	
Overhead, amount per year		Other driver costs per year	

PLEASE SEND THE QUESTIONNAIRE VIA EMAIL TO kwe@nea.nl

OR FAX THE QUESTIONNAIRE TO +31 70 3988426

ON BEHALF OF IRU AND NEA, THANK YOU VERY MUCH FOR YOUR TIME AND INTEREST IN COMPLETING THE QUESTIONNAIRE.

Questionnaire ECMT

QUESTIONNAIRE ON ROAD GOODS AND PASSENGER TRANSPORT STATISTICS

Objective of this IRU questionnaire is to update information on European road **passenger** and **goods** transport companies with data preferably from **2004**.

Regarding passenger transport, the questions refer to domestic (interurban) and international scheduled and unscheduled commercial transport. It does not cover own account and urban public transport carried out by private or state/municipality owned companies.

In goods transport data should cover *both hire & reward and own-account* transport operators.

Respondents are kindly asked to fill in the questionnaire and send it back to NEA BEFORE 10th December 2005, by fax, by mail (to the fax number / post address mentioned below) or using email (kwe@nea.nl).

For further information, please contact:

- **NEA Transport research and training, Mr Klaas Westerkamp, P.O.Box 1969, 2280 DZ Rijswijk, The Netherlands, tel +31 70 3988412, fax +31 70 3988426, email kwe@nea.nl**
- IRU, Mr Oleg Kamberski (tel +32 2 743 25 80, fax +32 2 743 25 99, email oleg.kamberski@iru.org) – passenger transport by road
- IRU, Mr Peter Krausz (tel +41 22 918 27 00, fax +41 22 918 27 41, email peter.krausz@iru.org) – goods transport by road

1. Contact details.

Name of responding person	
Email address	
Country	

2. Size distribution of transport companies (domestic)

Size category (number of vehicles)	Number of companies active in domestic scheduled/interurban and unscheduled/tourist passenger transport	Number of companies active in domestic goods transport		
		Hire& reward	Own-account	Both
1				
2 – 10				
11 – 50				
> 50				
Total				

3. Size distribution of transport companies (<u>international</u>)

Size category (number of vehicles)	Number of companies active in international scheduled/interurban and unscheduled/tourist passenger transport	Number of companies active in international goods[7] transport		
		Hire& reward	Own-account	Both
1				
2 – 10				
11 – 50				
> 50				
Total				

4. Vehicle taxation per vehicle per year in local currency and EURO (average)

Annual vehicle tax 12 metre **coach**	Local currency	
	EURO	
Annual vehicle tax 40-tons road train (**tractor and semi-trailer)**	Local currency	
	EURO	
Please indicate the date to which your answer refers	Date (dd/mm/yyyy)	

5. Modal shares – Passenger Transport (in % of number of passengers carried)

Passenger Transport Mode	Share (in %)	
	Domestic	International
Bus and coach		
Private car		
Railways		
Air transport		

6. Modal shares – Goods Transport (in % of number of tonnes carried)

Goods Transport Mode	Share (in %)	
	Domestic	International
Truck		
Railways		
Inland waterway		
Pipeline		
Air transport		

[7] In case licences are issued separately for domestic and international transport

PLEASE FAX THE QUESTIONNAIRE TO +31 70 3988426 OR SEND THE QUESTIONNAIRE VIA EMAIL TO **kwe@nea.nl**

Working together for a better future

IRU

since 1948

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