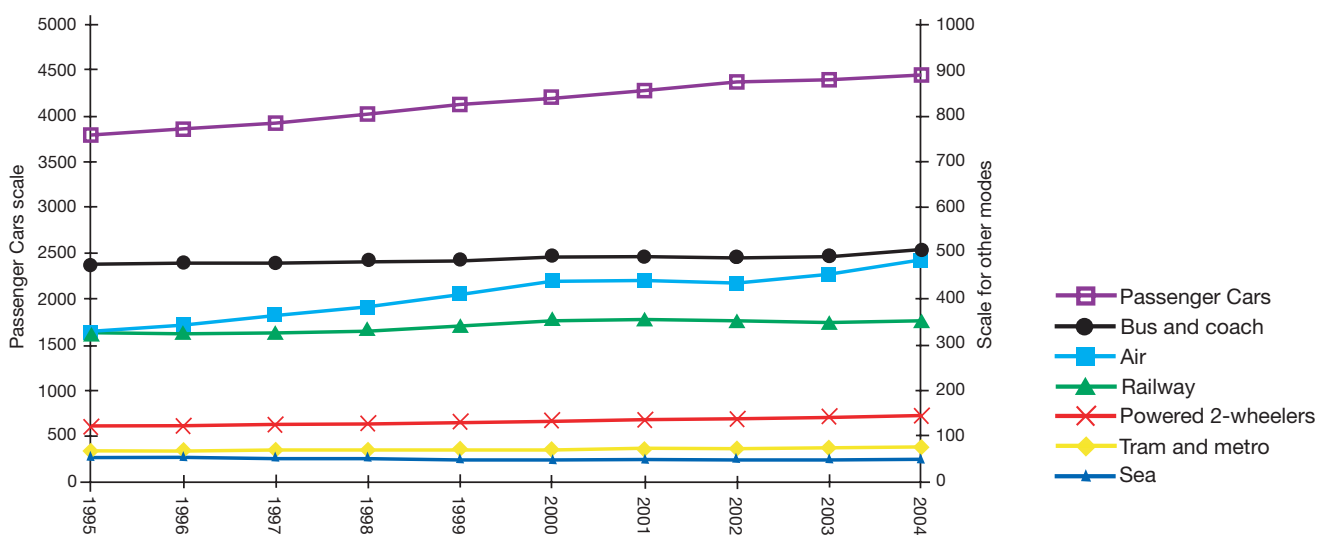


EU Bus and coach transport in figures (2006)¹

Comparable and Europe-wide statistics on bus and coach transport are almost inexistent. However, available data show that:

Bus and coach transport is the largest collective passenger mode in the EU-25: Over the last 10 years, the market share of bus and coach transport in Europe has stabilised at around 10%, with however a lower growth rate than in other transport modes. Nevertheless, bus and coach remains the most important mode of collective passenger transport in Europe, before rail.

EU-25 Performance by Mode for Passenger Transport, 1995-2004² billion passenger - kilometres



Competitors: Apart from the private car, the main market competitor for bus and coach operators is low cost airlines. This situation can largely be explained by the existing distortions of competition in terms of VAT, mineral oil taxation and various types of public subsidies that other modes enjoy.

Taxation: Diesel and vehicle taxation rates in Europe diverge substantially between countries, with a convergence trend towards a higher level inside the EU.

Role & position: Recent studies on the role of buses and coaches seem to confirm the already excellent safety, environmental and social record of bus and coach transport.

Typical company structure: The typical bus and coach transport company in Europe (50% of all companies) is a micro-company, owing 2 to 10 vehicles (the structure is similar to that in the USA). There are as many larger companies of up to 50 vehicles (20%) as one-man companies (26%). 4% operate more than 50 vehicles.

Profitability: Profitability ratios differ significantly. As a rule, EU operators display a profitability rate of between 0-5% (1-2% in the USA), whilst third country operators report substantially higher rates.

Bankruptcy: Available data on bankruptcy rates show no particularities specific to road transport.

¹ Source: Selected statistics on bus and coach transport in Europe, IRU, 2006 (Available on the IRU's bookshop, www.iru.org)

² Source: Energy & Transport in Figures 2006, European Commission