The situation of small operators in the haulage industry

Impact of the economic recession on the road transport market

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MAIN ECONOMIC INDICATORS / 1

1992 - 2010

(a) GDP at constant prices (annual % change)

	5-year averages 1992-96	1997-01	2002-06	2004	2005	2006	2007	Estimates 2008	Forecasts 2009	Scenario unchanged policies 2010	
BE	1.5	2.6	2.1	3.0	1.8	3.0	2.8	1.3	-1.9	0.3	BE
DE	1.4	2.1	0.9	1.2	0.8	3.0	2.5	1.3	-2.3	0.7	DE
IE	5.9	9.1	5.5	4.7	6.4	5.7	6.0	-2.0	-5.0	0.0	IE
EL	1.1	3.8	4.3	4.9	2.9	4.5	4.0	2.9	0.2	0.7	EL
ES	1.5	4.4	3.3	3.3	3.6	3.9	3.7	1.2	-2.0	-0.2	ES
FR	1.2	3.0	1.7	2.5	1.9	2.2	2.2	0.7	-1.8	0.4	FR
IT	1.2	2.0	0.9	1.5	0.6	1.8	1.5	-0.6	-2.0	0.3	IT
CY	3.5	4.2	3.3	4.2	3.9	4.1	4.4	3.6	1.1	2.0	CY
LU	2.6	6.3	4.4	4.5	5.2	6.4	5.2	1.0	-0.9	1.4	LU
MT	5.0	3.4	2.0	1.2	3.5	3.2	3.9	2.1	0.7	1.3	MT
NL	2.5	3.7	1.6	2.2	2.0	3.4	3.5	1.9	-2.0	0.2	NL
AT	1.8	2.6	2.2	2.5	2.9	3.4	3.1	1.7	-1.2	0.6	AT
PT	1.6	3.7	0.7	1.5	0.9	1.4	1.9	0.2	-1.6	-0.2	PT
SI	2.0	4.2	4.3	4.3	4.3	5.9	6.8	4.0	0.6	2.3	SI
SK	-	2.7	5.9	5.2	6.5	8.5	10.4	7.1	2.7	3.1	SK
FI	1.3	4.6	3.0	3.7	2.8	4.9	4.5	1.5	-1.2	1.2	FI
€ area	1.5	2.8	1.7	2.2	1.7	2.9	2.7	0.9	-1.9	0.4	€ area
BG	-2.8	2.0	5.7	6.6	6.2	6.3	6.2	6.4	1.8	2.5	BG
CZ	2.3	1.1	4.6	4.5	6.3	6.8	6.0	4.2	1.7	2.3	CZ
DK	2.6	2.4	1.8	2.3	2.4	3.3	1.6	-0.6	-1.0	0.6	DK
EE	-	6.6	8.4	7.5	9.2	10.4	6.3	-2.4	-4.7	1.2	EE
LV	-8.7	6.3	9.0	8.7	10.6	12.2	10.3	-2.3	-6.9	-2.4	LV
LT	-8.4	5.0	8.0	7.4	7.8	7.8	8.9	3.4	-4.0	-2.6	LT
HU	0.6	4.6	4.3	4.8	4.0	4.1	1.1	0.9	-1.6	1.0	HU
PL	4.9	4.4	4.1	5.3	3.6	6.2	6.7	5.0	2.0	2.4	PL
RO	1.4	-0.9	6.2	8.5	4.2	7.9	6.2	7.8	1.8	2.5	RO
SE	1.2	3.3	3.2	4.1	3.3	4.2	2.5	0.5	-1.4	1.2	SE
UK	2.5	3.4	2.5	2.8	2.1	2.8	3.0	0.7	-2.8	0.2	UK
EU	1.4	2.9	2.0	2.5	2.0	3.1	2.9	1.0	-1.8	0.5	EU
US	3.3	3.3	2.7	3.6	2.9	2.8	2.0	1.2	-1.6	1.7	US
JP	1.4	0.5	1.7	2.7	1.9	2.0	2.4	-0.1	-2.4	-0.2	JP

Source: Eurostat (Jan 2009)

MAIN ECONOMIC INDICATORS / 2

(b) Gross fixed capital formation in equipment (annual % change)

	5-year averages 1992-96	1997-01	2002-06	2004	2005	2006	2007	Estimates 2008	Forecasts 2009	Scenario unchanged policies 2010	
BE	-0.5	6.2	2.0	7.5	5.4	5.1	8.2	6.4	-4.2	0.3	BE
DE	-2.9	6.3	2.9	4.6	6.0	11.1	6.9	5.6	-10.0	-1.1	DE
IE	8.9	10.0	5.6	9.5	21.7	-4.5	14.1	-10.0	-20.0	3.0	IE
EL	7.4	10.9	10.7	12.7	-1.0	14.2	9.1	4.3	-1.4	0.5	EL
ES	-0.1	9.1	5.1	5.1	9.2	10.2	10.0	0.1	-12.7	-4.5	ES
FR	0.8	7.6	1.2	2.3	3.2	2.8	5.8	1.3	-7.8	-0.4	FR
IT	0.1	5.2	0.9	3.0	1.3	3.5	-0.1	-2.9	-10.2	0.3	IT
CY	-	5.3	4.5	16.1	-5.6	15.5	4.9	5.0	1.2	1.2	CY
LU	-4.2	11.0	2.2	20.8	4.6	2.5	22.2	-10.0	-8.0	2.0	LU
MT	-	-	-	-	-	-	-	-	-	-	MT
NL	5.6	6.1	2.8	-2.5	3.2	14.1	8.7	9.7	-5.6	-0.1	NL
AT	2.9	2.9	0.5	-1.8	6.9	-0.8	5.9	2.4	-6.1	-0.7	AT
PT	1.1	9.1	-0.1	3.2	1.0	7.3	8.2	3.7	-11.0	-3.0	PT
SI	9.7	11.8	8.0	9.0	5.4	15.2	9.3	5.8	-2.1	4.4	SI
SK	-	1.8	4.4	3.5	22.0	-6.3	4.2	7.2	2.3	2.5	SK
FI	-1.4	6.7	1.2	0.4	-0.2	4.1	11.5	2.3	-6.5	0.6	FI
€ area	-	6.9	2.5	3.6	4.7	7.0	6.3	2.2	-9.2	-0.8	€ area
BG	-	-	-	-	-	-	-	-	-	-	BG
CZ	17.0	5.6	3.2	5.2	1.2	8.1	5.2	4.0	1.7	1.7	CZ
DK	3.4	6.2	2.8	3.2	1.6	13.2	5.4	-0.2	-3.2	-0.1	DK
EE	-	-	-	-	-	-	-	-7.0	-15.0	1.0	EE
LV	-	-	-	-	-	-	-	-	-	-	LV
LT	-	13.5	15.2	32.1	11.5	16.8	18.3	-5.3	-9.4	-2.1	LT
HU	-	-	-	-	-	-	-	2.0	-4.0	1.5	HU
PL	-	7.1	4.8	9.0	9.9	17.1	33.3	8.1	-4.9	-1.0	PL
RO	6.2	9.3	14.7	8.9	18.9	23.5	27.1	18.0	0.7	2.2	RO
SE	5.1	5.9	5.2	3.9	12.3	9.3	10.1	4.0	-6.2	-2.0	SE
UK	4.6	8.1	2.3	7.9	1.7	4.0	9.0	-2.6	-11.1	-2.8	UK
EU	-	-	-	-	-	-	-	-	-	-	EU

Note : - As usual, the forecasts are conditioned upon, inter alia, the technical assumption of 'no policy change'. This means that specific policy measures, especially in the budgetary field, which have not yet been disclosed are not taken

IMPACT OF THE CRISIS ON ROAD TRANSPORT → THE REAL ECONOMY

- Falling Demand
- Companies significantly decreasing vehicle fleet
- Restructuring
- Haulage tariffs in decline
- From 2008 thousands of companies closed

- Commercial vehicles registrations down 38.7% in January 2009
- A decrease in circulation of goods
- In the last quarter of 2008 GDP fell by -1.6 %
- Increase in unemployment

CHALLENGES

- Full transportation costs
- Haulage tariffs
- Weak contractual power
- Structural weakness
- Lack of access to credit
  / Taxes and charges

ACTIONS

- Minimum rate for transport services
  → fuel surcharge
- Commercial diesel
- 30-day payment
- Access to finance
  / Delay collection of taxes

ACTIONS

Covering full transport costs

- To establish a European observatory on transport costs to monitor developments and rates
  - Thus putting in place a mechanism allowing rates calculated on the basis of **the actual cost of the service** and against unfair conditions imposed to road haulers undermining road safety and competitiveness

⇨ clause of **automatic revision of transport prices according to changes in fuel prices**

ACTIONS

Commercial Diesel

- To introduce at EU level a system of total reimbursement of excise duty and the implementation of an effective commercial diesel

ACTIONS

30-day payment

- To modify Directive 2000/35 on combating late payment in commercial transactions
  - A compulsory and effective mechanism fixing a period of payment of ***30 days***
  - An enforcement system in case of late payment in commercial transactions in transport sector
  - Private sector (*not only public)*

ACTIONS

Access to finance

➢ *providing credit lines to finance investments and operations;*

→ an extension of credit guarantee systems with a special focus on micro-lending

➢ introducing a moratorium on interest on debts and leasing contracts;

➢ Providing incentives / fundings to comply with EU environmental law

delay collection of taxes (e. g. Social Security Tax)

UETR

CONCLUSIONS

PERFORMANCE

GDP growth rate: **1 %**

Road transport growth rate: ***1,5 %***

Re-think the role

service sector or

“the backbone of the real economy” ?

Thank you

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