



Development in the Road Transport Market

UNECE WP on Transport Trends and Economics

Geneva, 3–5 September 2012

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Evolution of IRU Membership

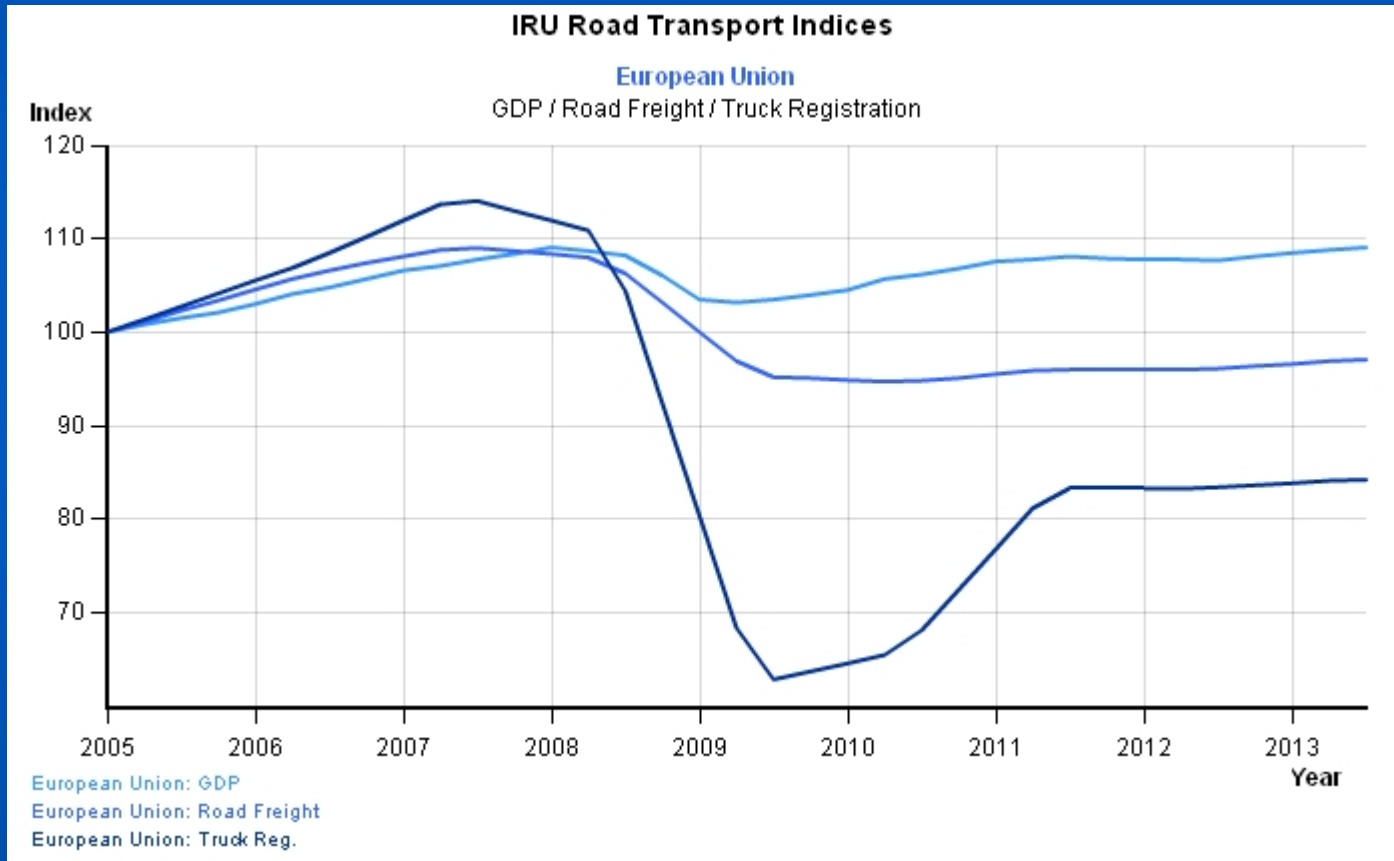
2012: 170 Members
in 73 countries

2012: 22
CRIPA
Members

-  IRU Founding Member Countries
-  IRU Member Countries
-  IRU Regional Committee for Africa Member Countries



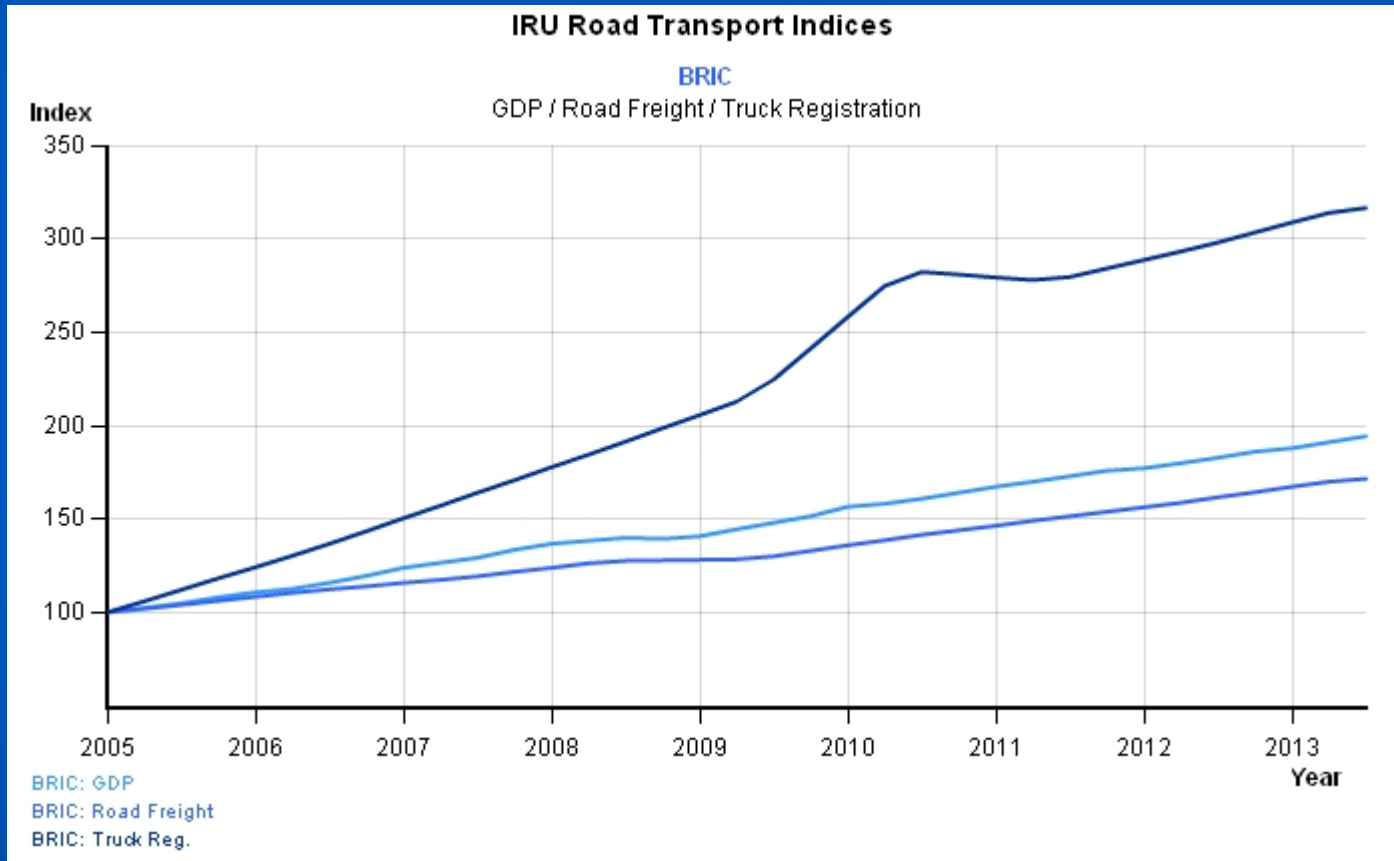
EU and OECD - double dip recession ahead





BRIC countries forge ahead

Right focus on SMEs





Investments by Road Transport Operators

Capacity Increase

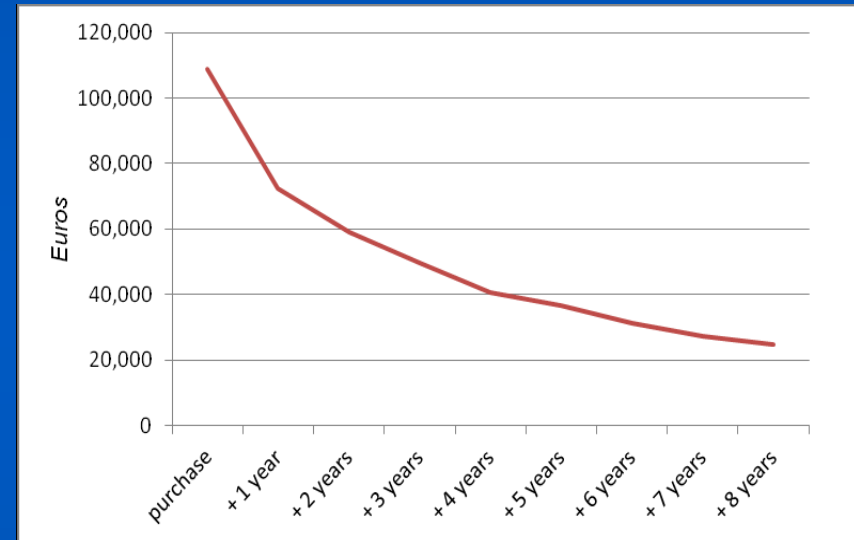
vs.

Replacement of Vehicles

- 2011 – focus on replacement investments (lack of adequate capital reserves of transport operators)
- expansion investments have been rare (some catch-up effects, investments mainly by large logistics providers)

General trend:

- The economic crisis led in many countries to an oversupply of transport capacity and thus a decrease in the price of second-hand vehicles
- Vehicle manufacturers offered considerable rebates for new vehicles during the years 2009 and 2010, which in turn put added pressure on the second-hand market





Economic crisis and the second-hand market

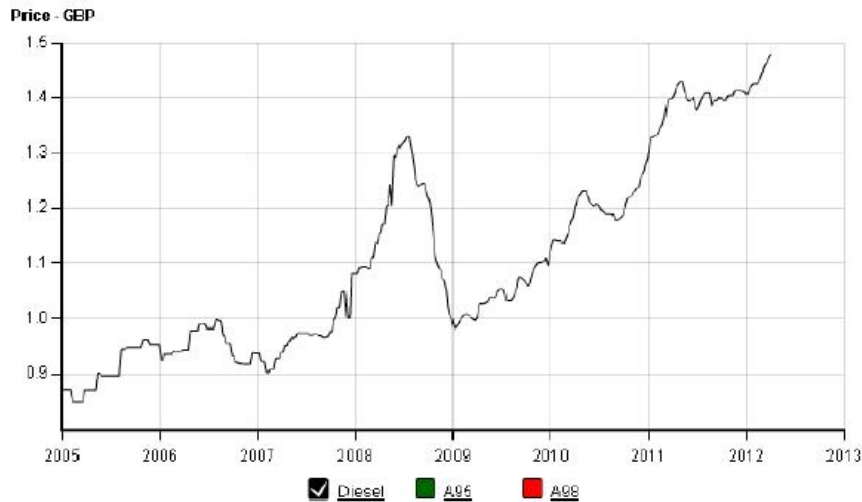
Regional trend:

- Many vehicles bought in Northern and Central Europe were traditionally sold on the second-hand markets of Southern and Eastern Europe
- The ongoing economic crisis has hit southern countries unproportionally hard and transport operators in these countries do not have the means to purchase vehicles anymore
- This has led to an increase of second-hand vehicles in northern countries, and thus a rapid depreciation of existing assets

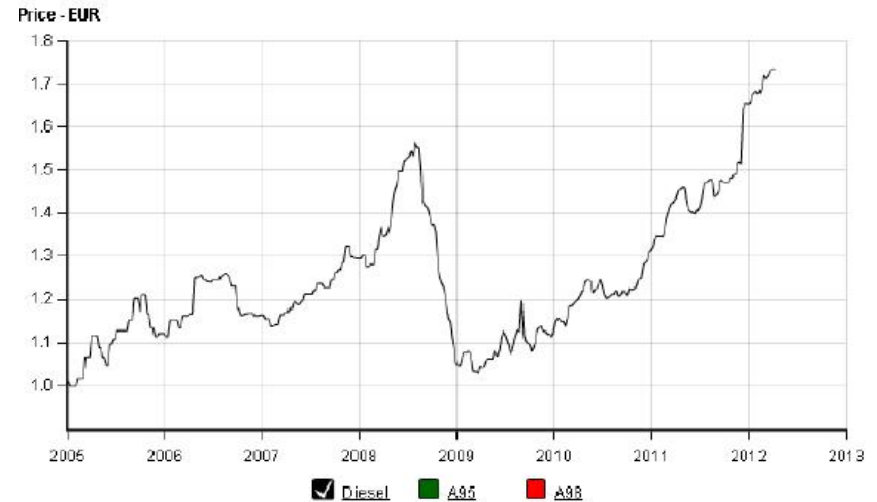


Dramatic Fuel Price Increase!

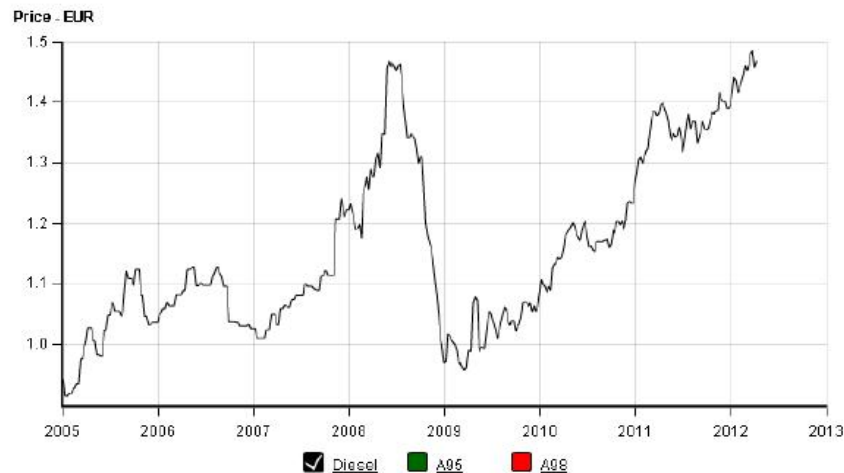
Fuel Prices - United Kingdom



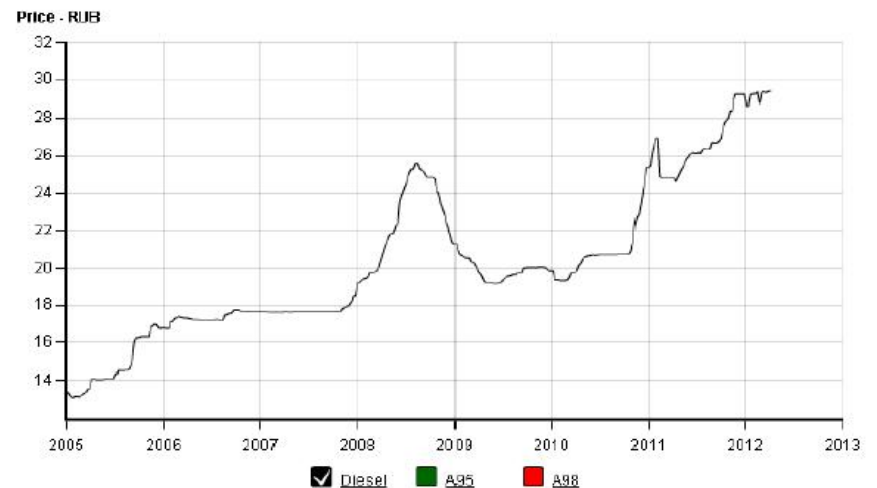
Fuel Prices - Italy



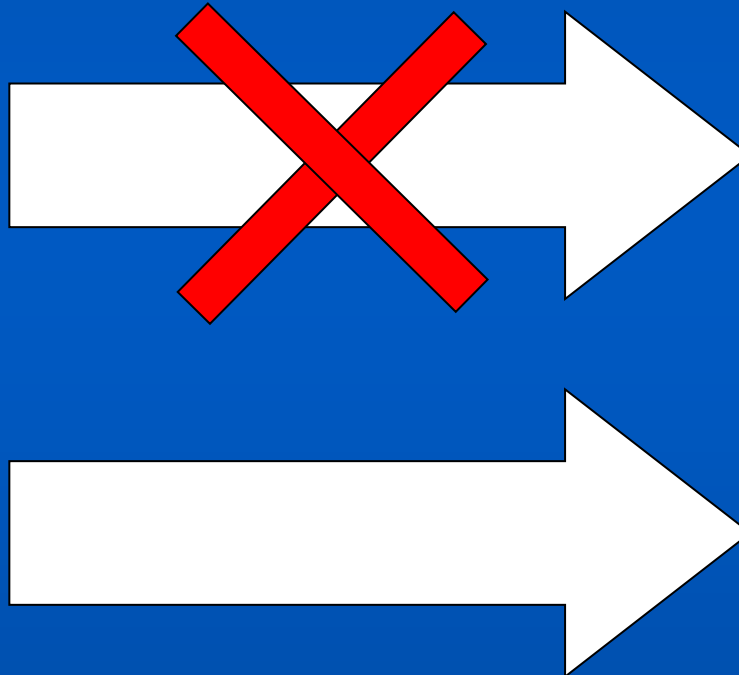
Fuel Prices - France



Fuel Prices - Russian Federation



Need to diversify the energy market

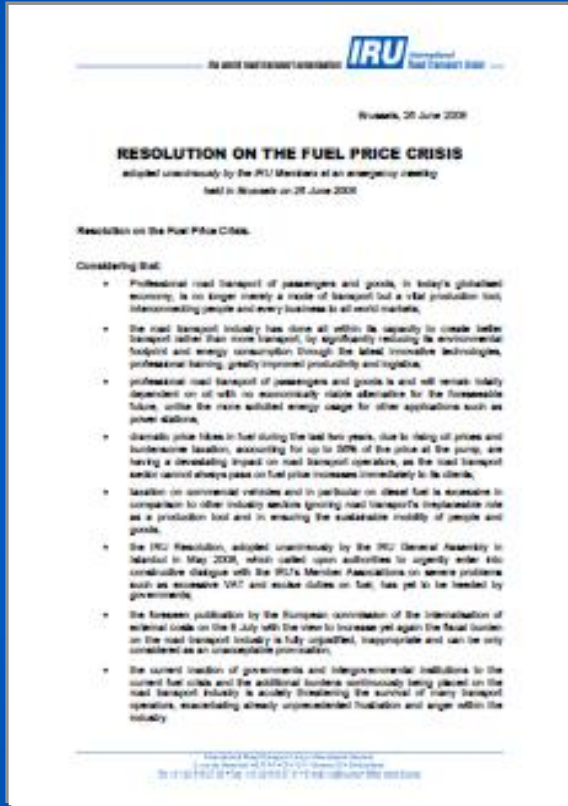


Biofuels are not the solution!





IRU Resolution on Fuel Price Strategy for Governments



Calls on Governments to:

- Introduce a “professional fuel”
- With the same tax as other modes





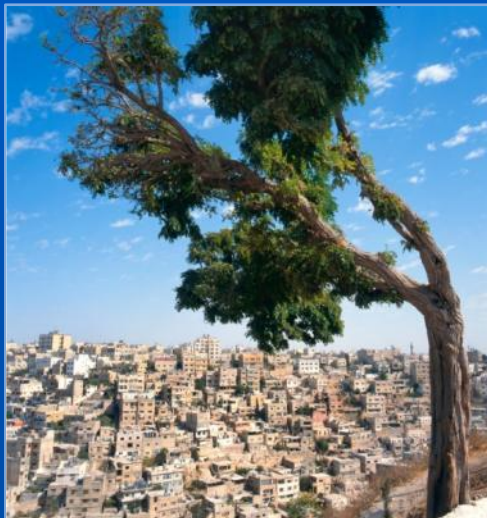
Save the date!



7th Euro-Asian Road Transport Conference & Ministerial Meeting



Amman, 12-13 June 2013





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