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Economic Commission for Europe

Inland Transport Committee

Working Party on Transport Trends and Economics

Twenty-sixth session

Geneva, 10–12 September 2013

Item 8 (d) of the provisional agenda

**Review of the transport situation, transport trends
and economics in ECE region –**

Transport Trends and Challenges in the road sector

Development in the road transport market

Submitted by the International Road Transport Union



Development in the Road Transport Market

UNECE Working Party on
Transport Trends and Economics (WP.5)

Geneva, 10-12 September 2013

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Evolution of IRU Membership

2013: 170 Members
in 74 countries

...and 26 CRIPA
Members in 22
countries

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

1948 – IRU founded in **Geneva**



1973 – IRU Permanent Delegation to the European Union in **Brussels**

1998 – IRU Permanent Delegation to Eurasia in **Moscow**



2005 – IRU Permanent Delegation to the Middle East and Region in **Istanbul**

2012 – IRU Secretariat for Africa in **Geneva**



2013 – IRU Permanent Delegation to the United Nations in **New-York**



Data Source

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

Road Transport Indices

IRU Indices on road transport performance give country estimates of economic growth, truck registration and transport volumes in 58 countries.

The IRU Road Transport Indices are published on a quarterly basis and give stakeholders, such as the press, politicians and the public, a view on the performance of the road transport sector based on past performance and supplemented with a short-term forecast.

1st country: OECD, 2nd country: European Union, 3rd country: BRIC

IRU Road Transport Indices

OECD / European Union / BRIC
ODP / Road Freight / Truck Registration

Index (2005=100) vs Year (2005-2012)

- OECD GDP
- European Union GDP
- BRIC GDP
- OECD Road Freight
- European Union Road Freight
- BRIC Road Freight
- OECD Truck Reg
- European Union Truck Reg
- BRIC Truck Reg

IRU - IRU Forms - Response Summary

2.2 International Hauliers' Revenue Development - Estimated Change in Percentage: Jan - June 2010 compared to Jan - June 2009

Response	Response Percent	Response Count
+20 or more	5.4%	1
+10	61.2%	11
0	22.2%	4
-10	11.2%	2
-20 or less	0%	0

3.1 Domestic Road Freight Transport Output - Estimated Change in Percentage in tonne-km: Jan - June 2010 compared to Jan - June 2009

Response	Response Percent	Response Count
+20 or more	11.2%	2
+10	38.8%	7
0	27.8%	5
-10	22.2%	4
-20 or less	0%	0

3.2 International Road Freight Transport Output - Estimated Change in Percentage in tonne-km: Jan - June 2010 compared to Jan - June 2009

Response	Response Percent	Response Count
+20 or more	18.7%	3
+10	64.4%	8
0	16.7%	3
-10	16.7%	3
-20 or less	5.4%	1

4. Employment

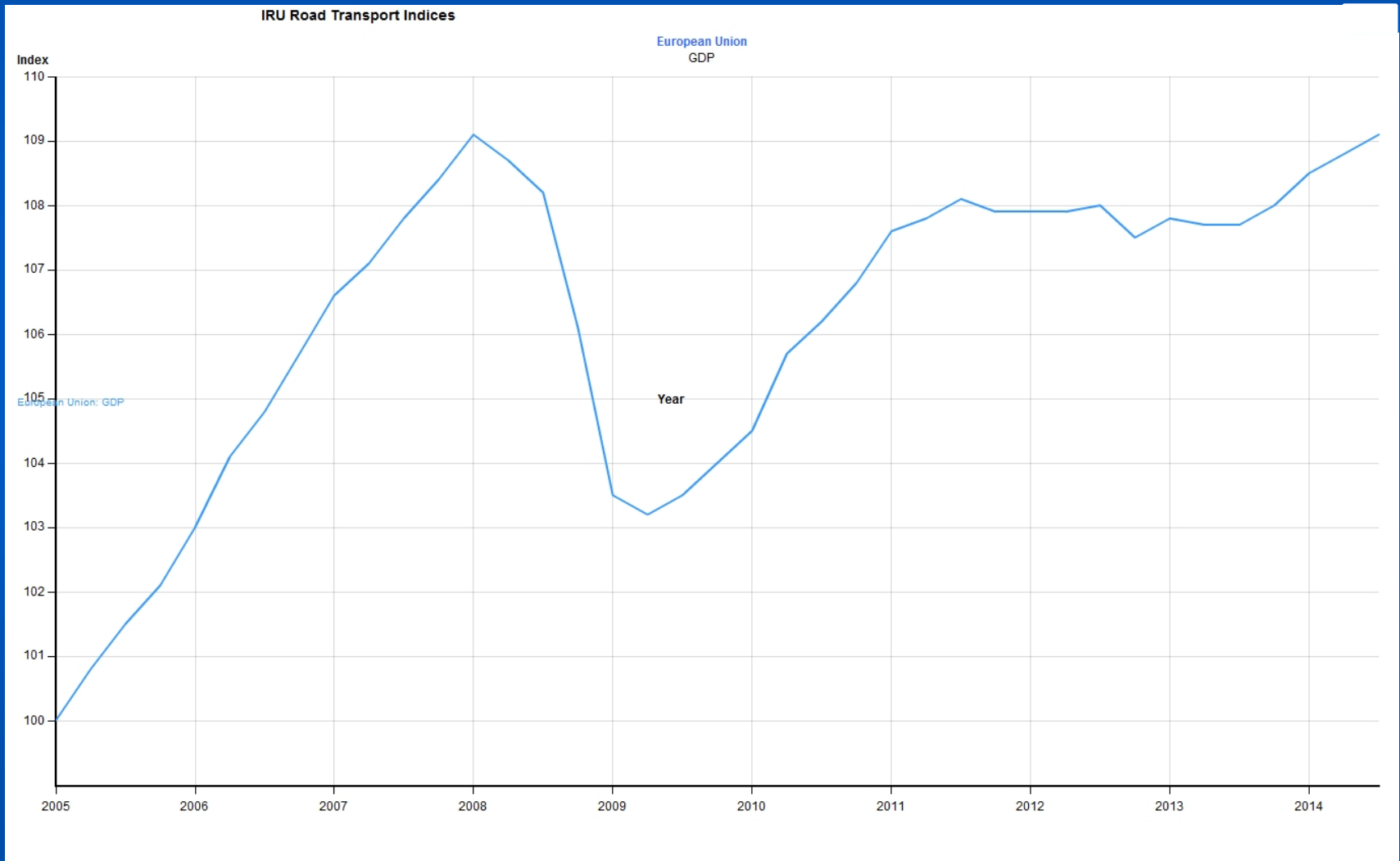
4.1 Driver Employment in Road Freight Transport - Estimated Change in Percentage: Jan - June 2010 compared to Jan - June 2009

Response	Response Percent	Response Count
+20 or more	0%	0
+10	22.2%	4
0	30%	6
-10	27.8%	5
-20 or less	0%	0

Survey of IRU Members



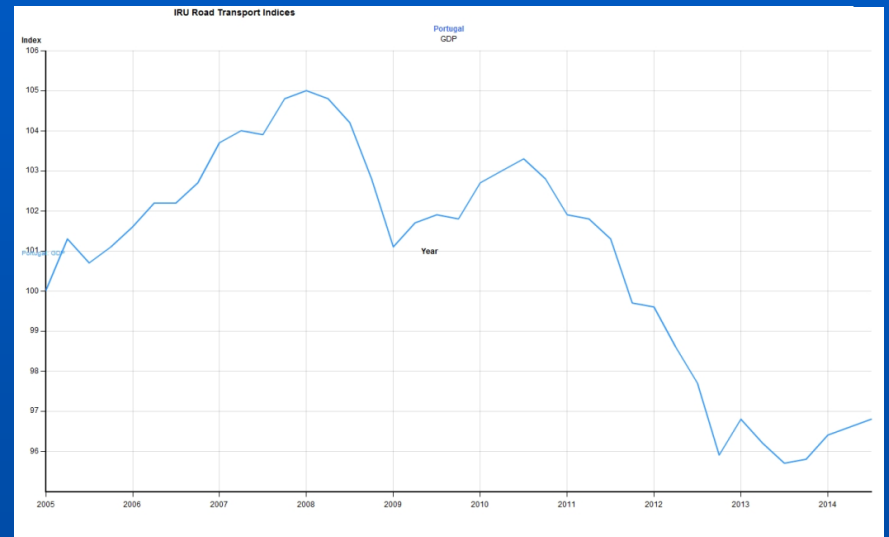
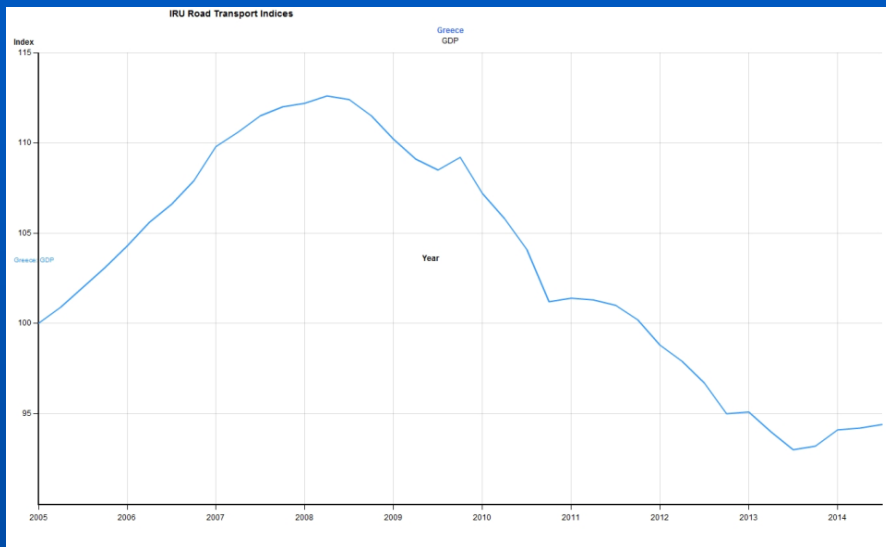
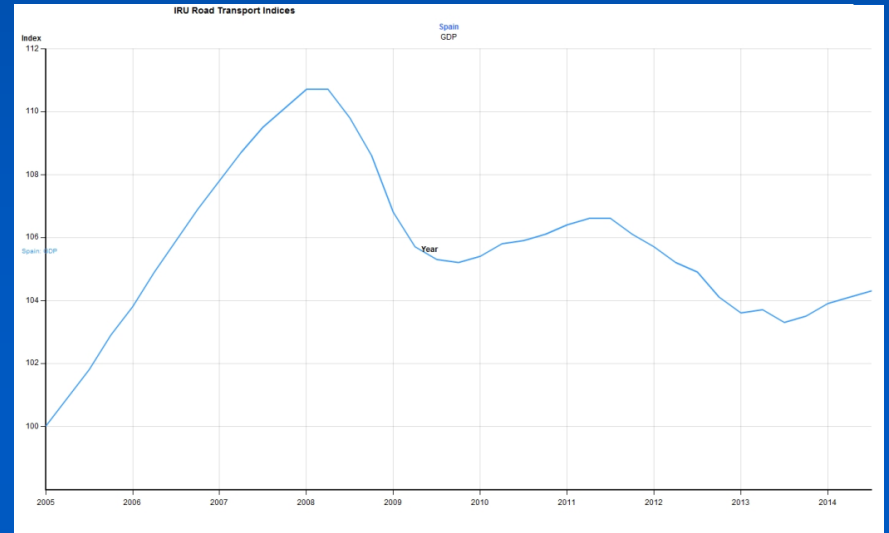
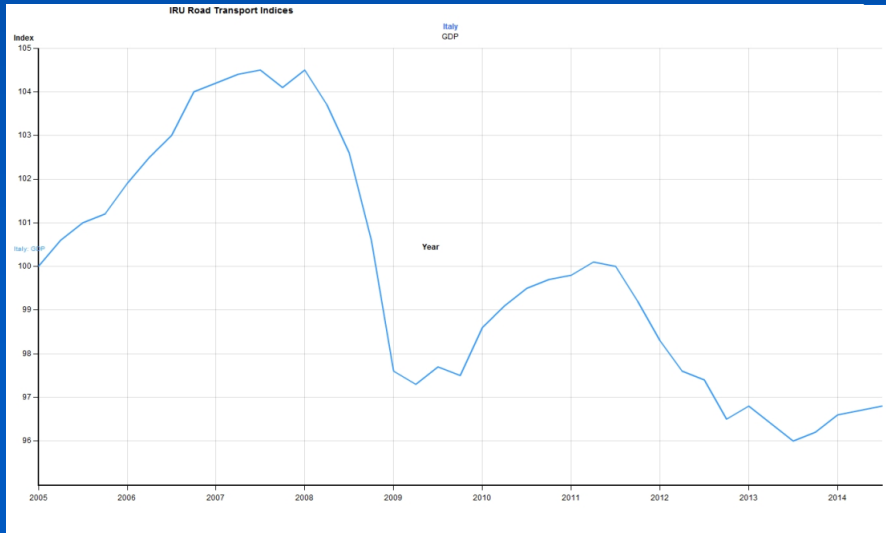
EU and OECD – double dip recession confirmed





North – South Divide

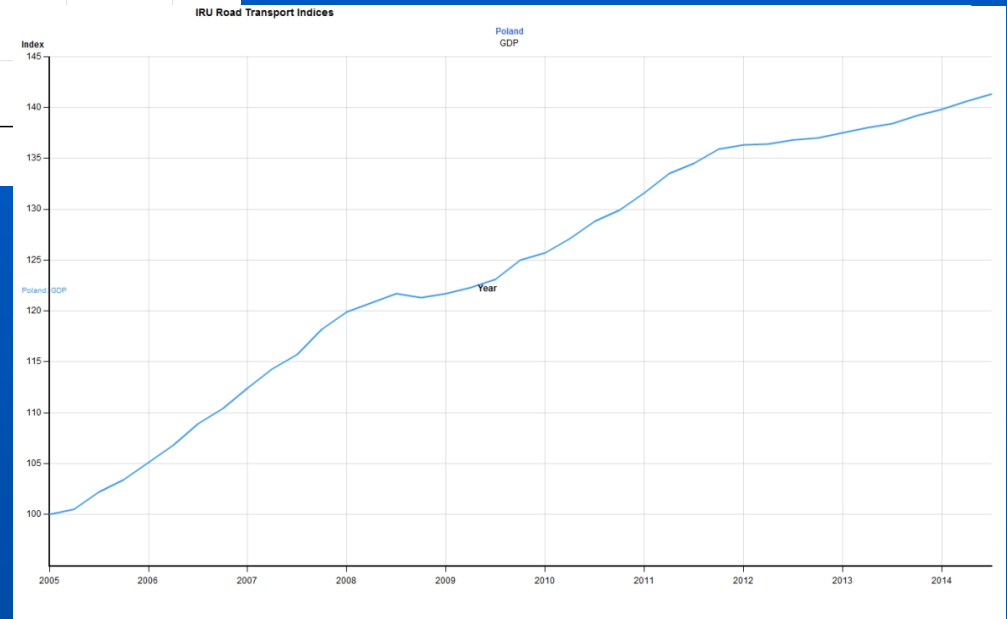
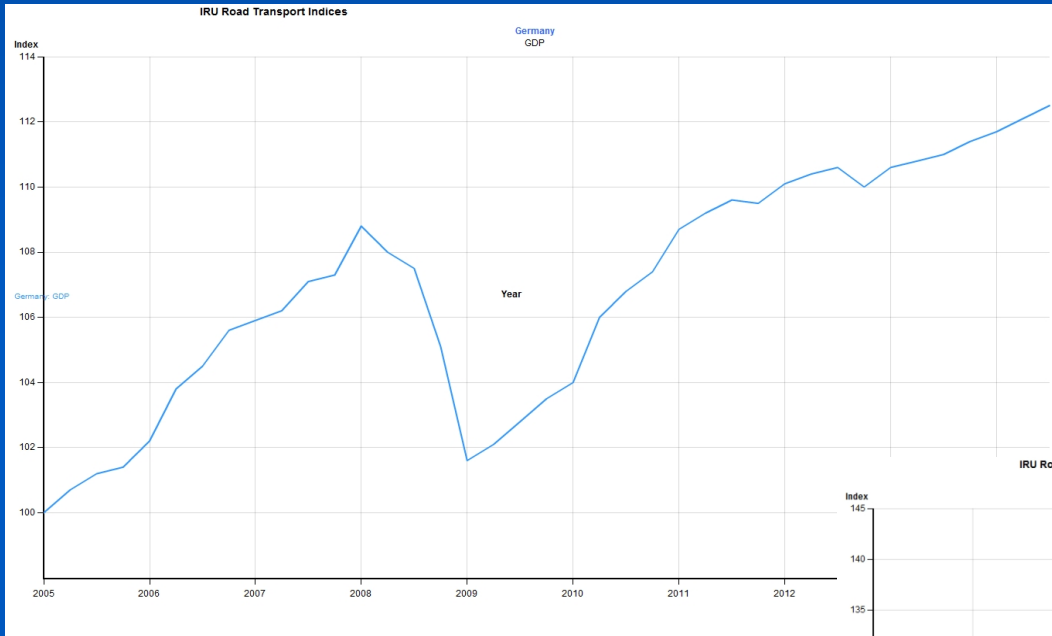
Deep recession in the South





North – South Divide

North ekes out growth

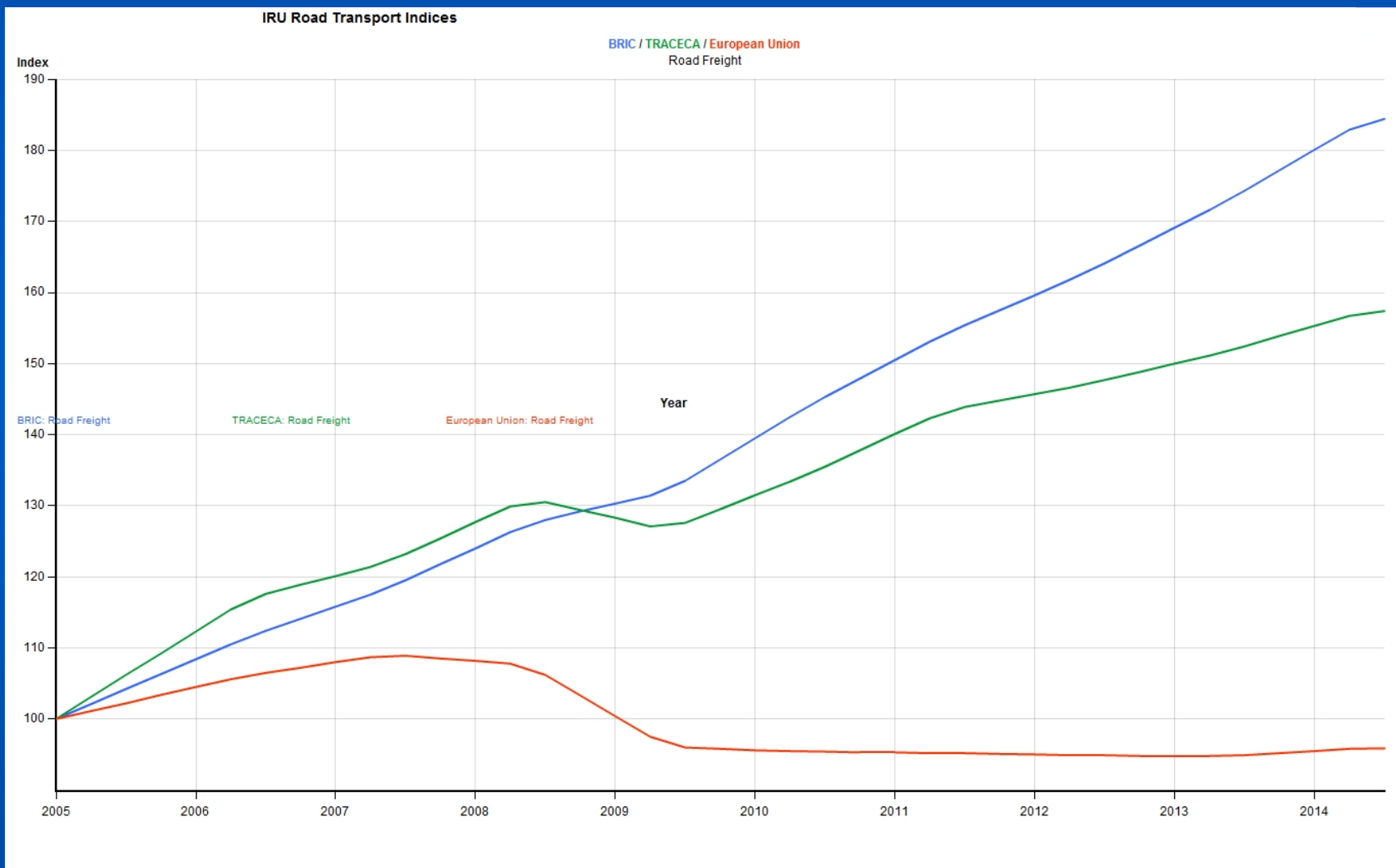




Transport Volume

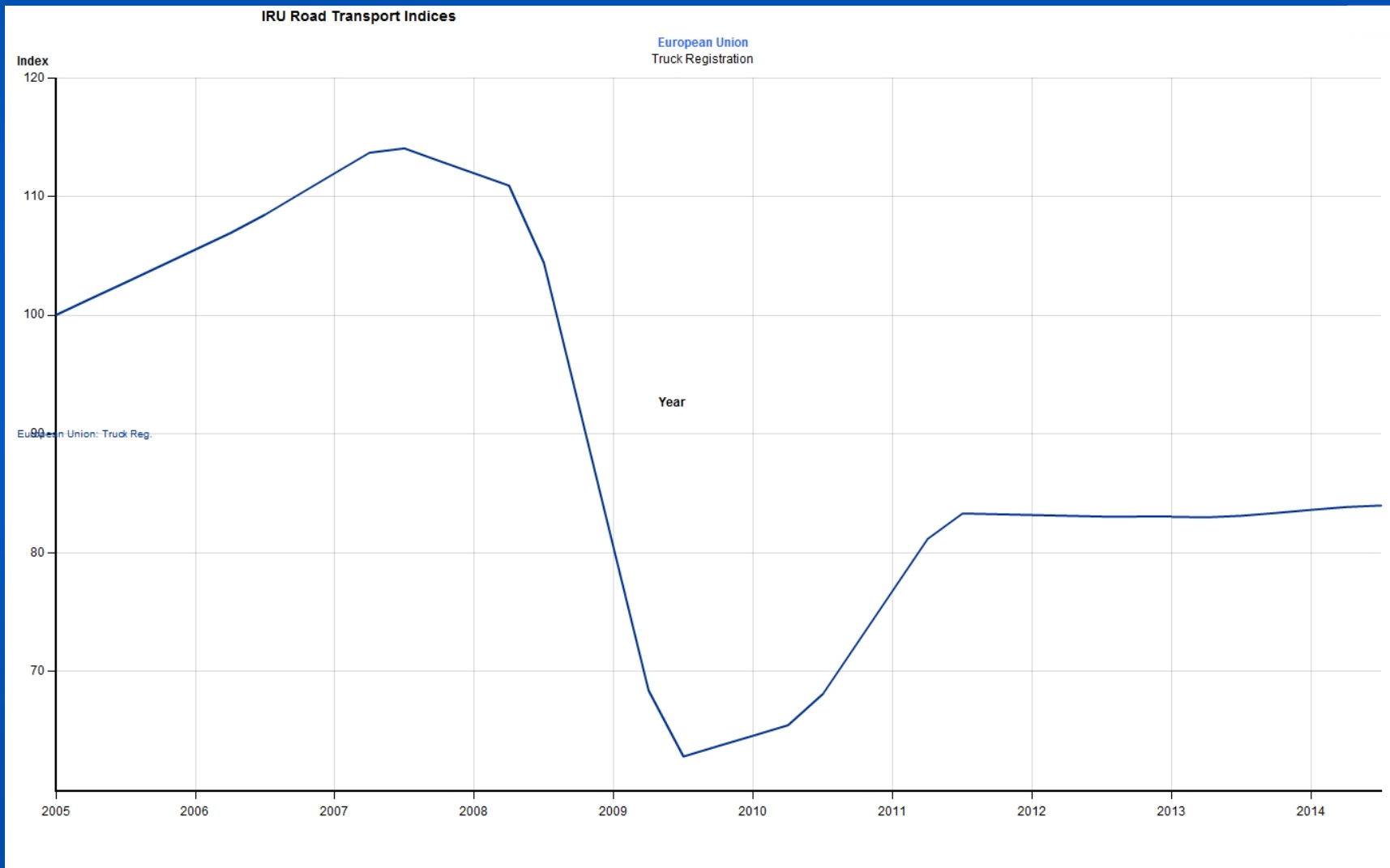
EU - below pre-crisis

BRIC & TRACECA - above pre-crisis





Not to mention vehicle sales in the EU...

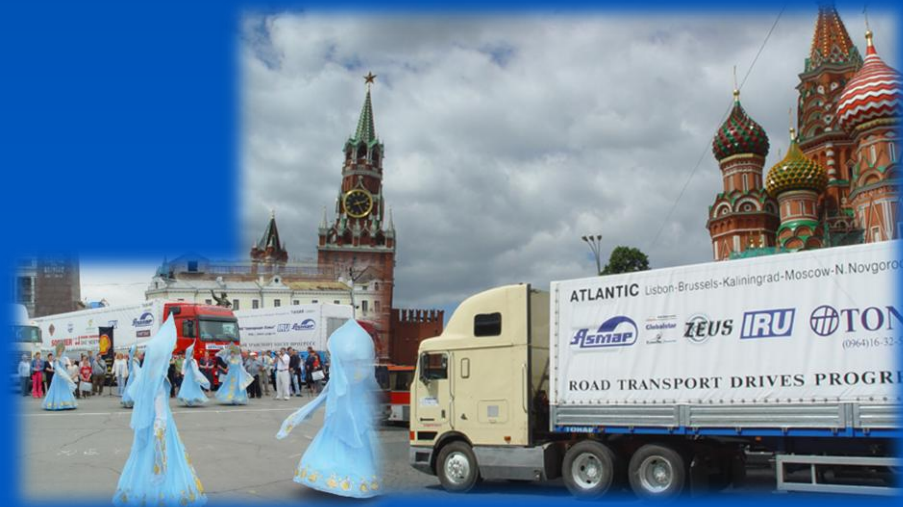




IRU Caravans concluded shocking results

The Lisbon-Vladivostok Caravan

The Beijing-Berlin-Brussels Caravan



Black Sea Highway Caravan

IRU-ECO Silk Road Truck Caravan





IRU Caravans demonstrated that adequate roads exist, but that there is little traffic!!





...until the trucks reached
border crossings!!





IRU New Eurasian Land Transport Initiative (NELTI)

- From September 2008 to date
- Monitoring of over 200,000 border crossings



ECO RMT

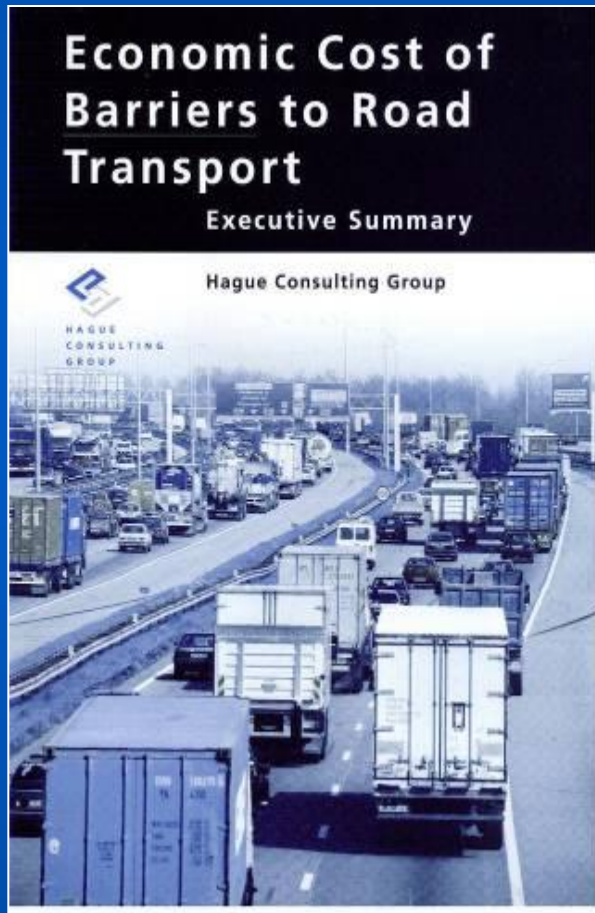


57% of transport time lost at **border crossings!**

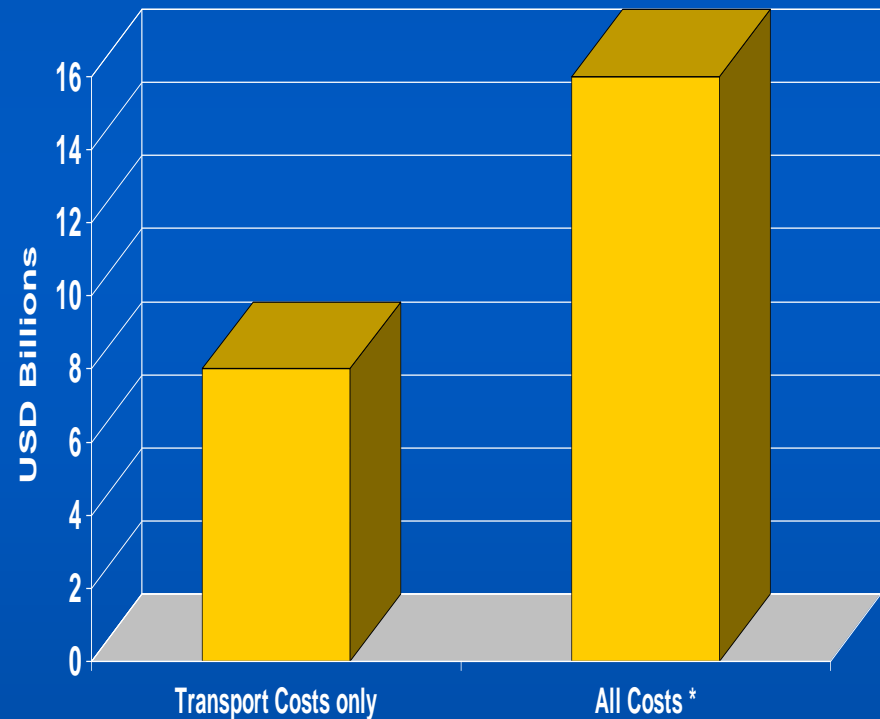
38% of transport costs due to **unofficial levies**



Any penalty on road transport is an even greater penalty on the economy as a whole!



Source: Hague Consulting Group



* Includes lost opportunities



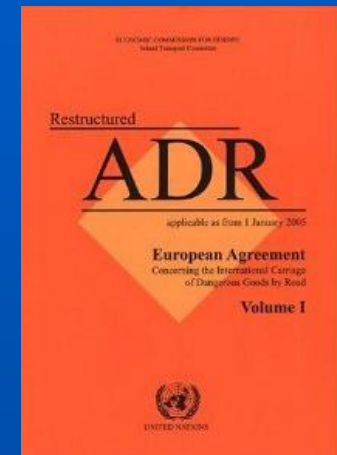
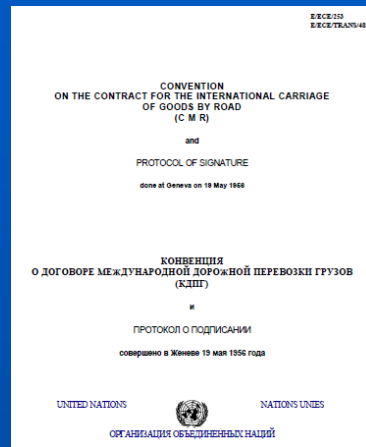
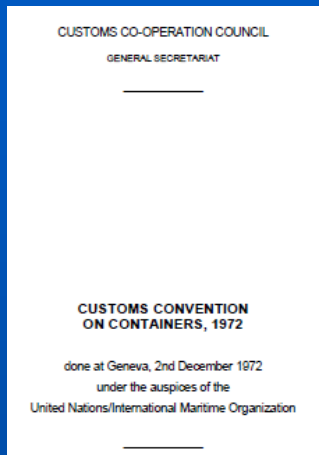
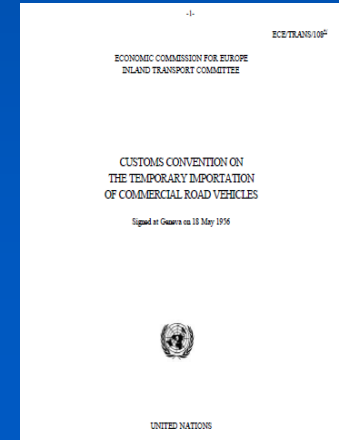
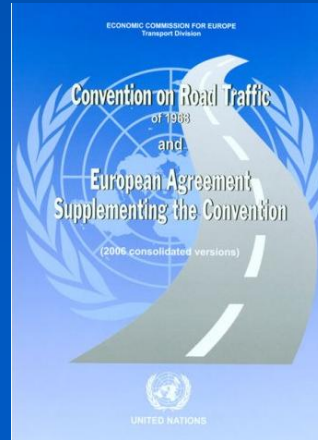
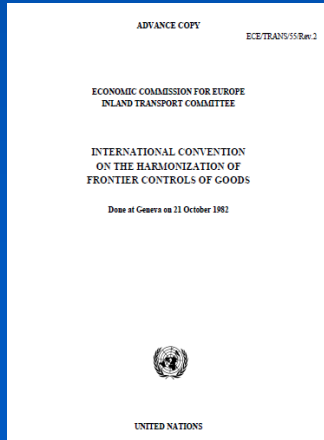
How can we change this view and let road transport drive trade, progress and prosperity?







Implement key UN Trade Facilitation Instruments to allow countries to be land-linked!





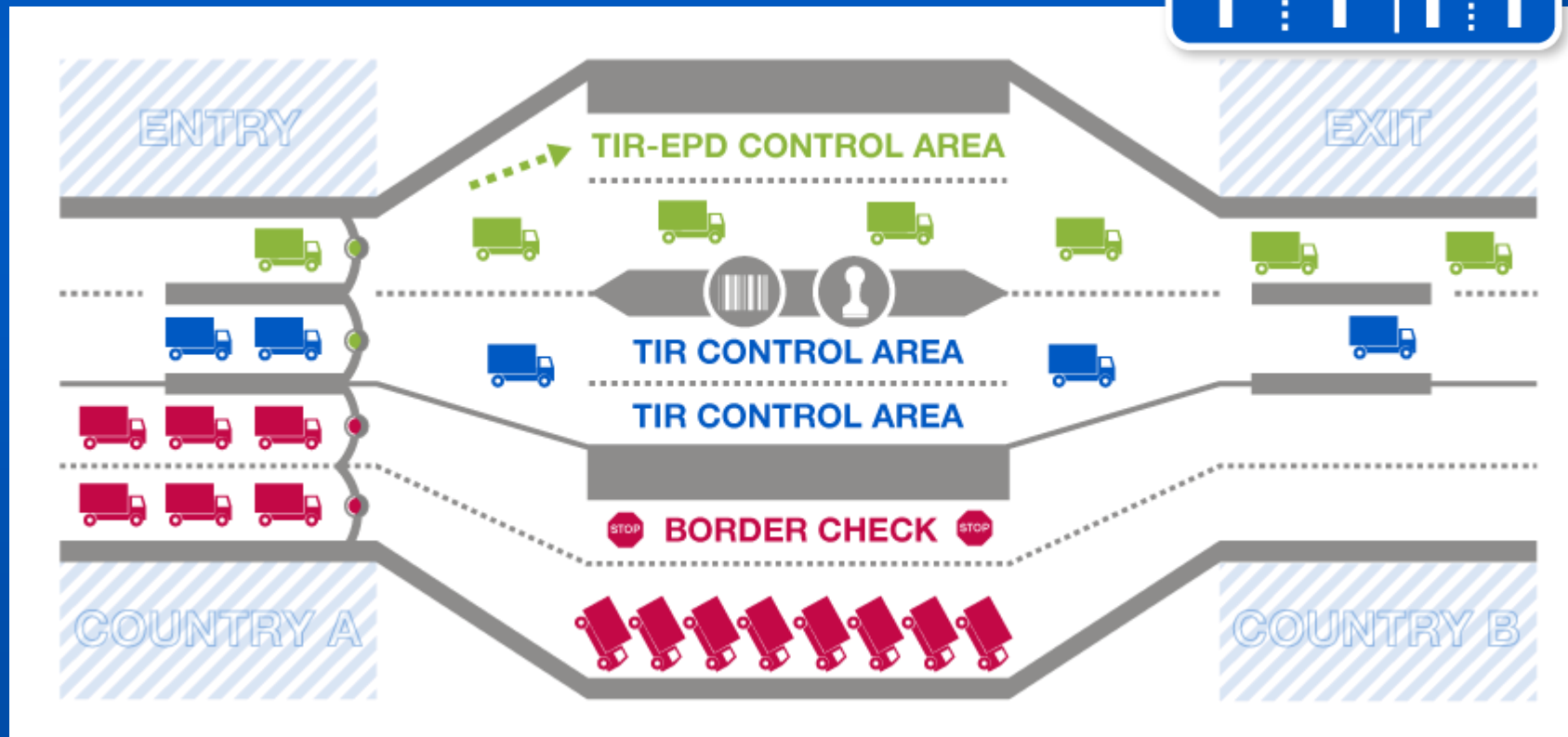
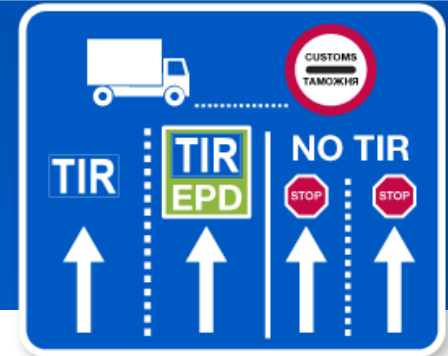
**Securing and facilitating trade
and international road transport**

TIR

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IRU since 1949**

Reduce border waiting times, facilitate trade, increase risk management efficiency, improve Customs controls, secure trade and transport!



We want to see this...







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for a better future*



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