



The situation of small operators in the EU haulage industry

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LINK BETWEEN ROAD TRANSPORT AND ECONOMIC GROWTH

- Road transport accounts for more than 50% of all persons employed in the sector;
- 2/3 of the people working in road transport enterprises are active in transport of goods;
- Transport demand is closely linked to economic growth;
- Freight transport is **the backbone of the real economy**

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MAIN ECONOMIC INDICATORS / 1

1992 - 2010

Indicator	2000					2001					2002					2003					2004					2005					2006					2007					2008					2009					2010				
	Q1	Q2	Q3	Q4	YTD	Q1	Q2	Q3	Q4	YTD	Q1	Q2	Q3	Q4	YTD	Q1	Q2	Q3	Q4	YTD	Q1	Q2	Q3	Q4	YTD	Q1	Q2	Q3	Q4	YTD	Q1	Q2	Q3	Q4	YTD	Q1	Q2	Q3	Q4	YTD	Q1	Q2	Q3	Q4	YTD										
GDP	100	100	100	100	100	99.5	99.5	99.5	99.5	99.5	99.0	99.0	99.0	99.0	99.0	98.5	98.5	98.5	98.5	98.5	98.0	98.0	98.0	98.0	98.0	97.5	97.5	97.5	97.5	97.5	97.0	97.0	97.0	97.0	97.0	96.5	96.5	96.5	96.5	96.5	96.0	96.0	96.0	96.0	96.0	95.5	95.5	95.5	95.5	95.5					



Source: Eurostat (Jan 2009)

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MAIN ECONOMIC INDICATORS / 2

Indicator	2000					2001					2002					2003					2004					2005					2006					2007					2008					2009					2010				
	Q1	Q2	Q3	Q4	YTD	Q1	Q2	Q3	Q4	YTD	Q1	Q2	Q3	Q4	YTD	Q1	Q2	Q3	Q4	YTD	Q1	Q2	Q3	Q4	YTD	Q1	Q2	Q3	Q4	YTD	Q1	Q2	Q3	Q4	YTD	Q1	Q2	Q3	Q4	YTD	Q1	Q2	Q3	Q4	YTD										
GDP	100	100	100	100	100	99.5	99.5	99.5	99.5	99.5	99.0	99.0	99.0	99.0	99.0	98.5	98.5	98.5	98.5	98.5	98.0	98.0	98.0	98.0	98.0	97.5	97.5	97.5	97.5	97.5	97.0	97.0	97.0	97.0	97.0	96.5	96.5	96.5	96.5	96.5	96.0	96.0	96.0	96.0	96.0	95.5	95.5	95.5	95.5	95.5					



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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



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CHALLENGES

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



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ACTIONS

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

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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 hauliers undermining road safety and competitiveness
- ⇒ clause of **automatic revision of transport prices according to changes in fuel prices**



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ACTIONS

Commercial Diesel

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



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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)



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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



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



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” ?

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Thank you



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