



Collapse of the Trucks Market and Road Freight Transport in Western Europe and in Italy, who's to blame? 2015 Report.

Cabotage, unfair competition, size of transport companies, low productivity, labor costs, taxes, moving abroad of operating locations.

Even the 2015 edition of the Study on the Global mobility of goods concludes stressing that something structural has gradually occurred in Western Europe and in Italy from 2006 onwards, leading to significant reductions in both the registration of trucks and transport volumes.

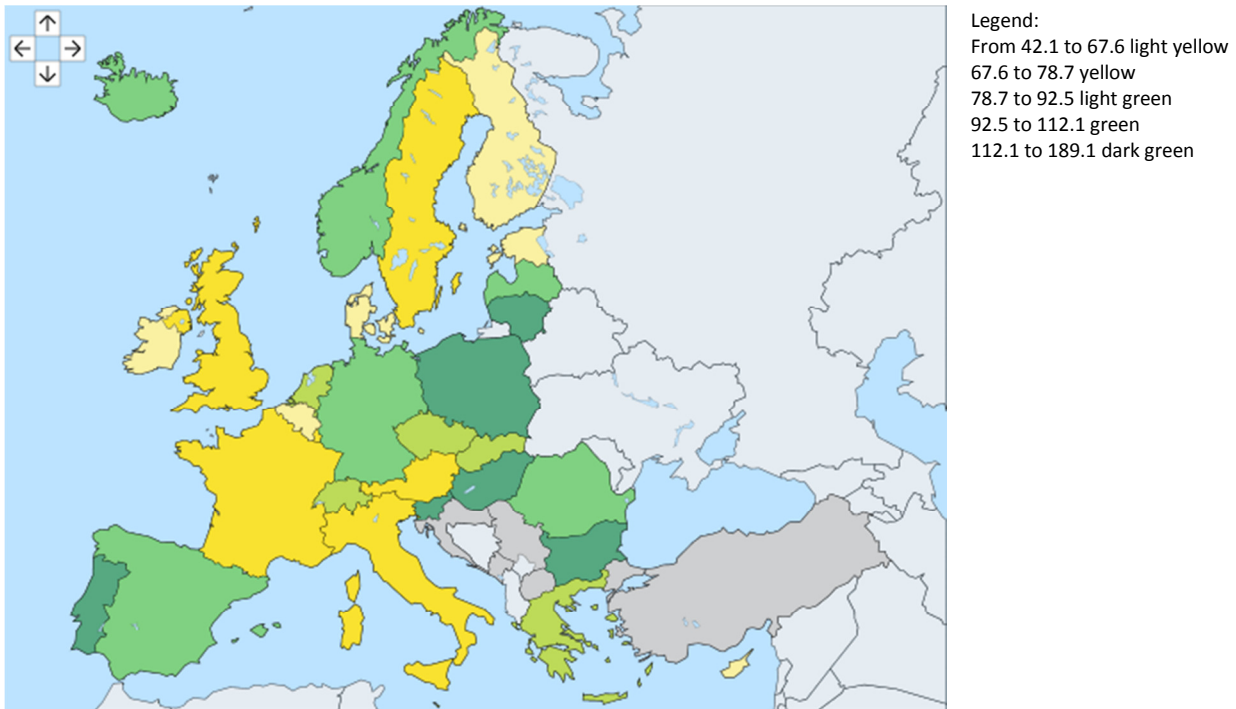
What follows is a brief analysis of the phenomenon to suggest some answers to the problem, starting with an analysis of the Truck Market in Eastern Europe in recent years.

Table 1 – Heavy trucks Registrations (>16 t) ESTERN Europe - Source ACEA

							Differences %	
	2009	2010	2011	2012	2013	2014	2014/13	2014/09
Bulgaria	495	908						
Romania	1542	1897	3388	2590	2978	3633	22	136
Hungary	1467	1965	3891	3783	4543	4438	-2,3	203
Poland	6324	8545	14555	14045	16733	15356	-8,2	143
Czech Rep.	2997	3996	6293	5585	6945	7463	7,5	149
Slovakia	1149	1865	3077	2937	3369	3185	-5,5	177
Slovenia	531	682	1209	939	1038	1343	29,4	153
Estonia	202	307	698	659	798	708	-11,3	250
Lithuania	414	1300	2638	2649	3228	2117	-34,4	411
Latvia	254	466	1407	1508	1340	979	-26,9	285
Total EU N.M	13908	21023	37215	34739	41476	40013	-3,5	188
Italy	11318	12235	13656	9763	10322	8.947*	-13,3	-20,9
Total EU 15	144039	152849	199153	178500	190619	177945	-6,6	23,5

* Unrae data

The graphical representation of the phenomenon, using the map below, published by Eurostat, makes it even more evident the above considerations.

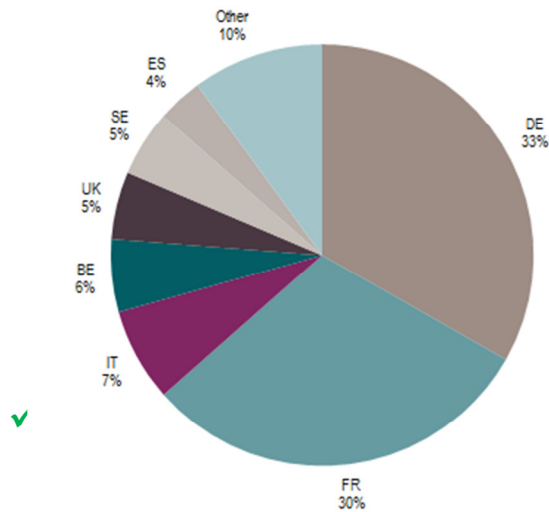


It seems to us quite obvious therefore that the substantial increases in the international transport and cabotage (against a reduction of the same in the rest of the EU) can not only be justified by the increase of production activities in those countries, where in fact the transport volumes increased much more than the gross domestic product (GDP) and national transport tends to fall or to stabilize.

Conclusions

All the latest available statistics (Eurostat and ACEA for Transport and trucks registrations and Unrae for registrations of trucks in Italy) show trends much more important for the new members of the EU than the EU as a whole, and Western Europe (EU15) and Italy in particular.

- Estonia, Latvia, Lithuania, Slovakia and Hungary have tripled registrations of heavy trucks in the five years from 2009 to 2013. But also Poland, Czech Republic and Slovenia increased by 2 and a half times. In the same period Italy has seen them fall by almost 21%.
- Compared to 2006, road freight transport in the EU in 2013 decreased by 7.4% while it increased in the new members of the community by 40.6%, with particularly high peaks in Bulgaria, Poland, Lithuania, Slovenia and Slovakia. Italy has lost 32%.
- In International Transport Italy has lost 52% of its volume of transport in favor of the Eastern Countries, increased between 2006 and 2013 by 55%. Countries with the largest increases were Bulgaria, Lithuania, Hungary, Poland, followed at some distance by Slovenia and Slovakia.
- While the total volume of freight transport in the EU has not yet recovered from the losses of the years of the global crisis, cabotage increased by 40% since 2004.



(1) Data exclude cabotage performed by UK.

- In terms of volumes in the countries in which cabotage takes place Italy, according to data from Eurostat, appeared to be in third place after Germany and France (see table alongside published by Eurostat). But these figures, especially for Italy, are conditioned by the volumes of cabotage reported by the national authorities, and therefore do not include what is done outside the rules laid down by Community legislation.

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