

# Fleet Dynamics in European Road Transport

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## Abstracts

This report focuses on the characteristics of road transport fleets across Europe, including vital information on vehicle replacement cycles, marque selection criteria and other key features of vehicle fleets, such as tyres and technology. Analytiqa interviewed in excess of one hundred fleet operators throughout Eastern Europe, Western Europe and Scandinavia to complete this research.

What is the most popular method of purchasing a vehicle, contract hire or outright purchase? There has been a shift away from the 'drive til they drop' policies previously employed by fleet operators. An important reason for this change in purchasing policy is that purchase agreements often come with attractive maintenance packages and as a result regularly changing vehicles makes good financial sense. How has this affected time scales for vehicle replacement?

Over half of fleet operators choose to outsource their vehicle maintenance to third party providers, largely because purchase deals often include maintenance provision. Significant numbers of fleet operators however undertake at least some of their maintenance in-house.

What percentage perform their maintenance in-house?

What percentage use a combination of in-house and outsourced labour to maintain their fleets?

What are the reasons underlying these trends in the market?

Are these trends likely to continue and to what extent?

How could this affect the growth opportunities for service providers into this

sector?

All these questions are comprehensively answered within this report.

Effective tyre management has increased in importance over recent years since it has been shown that tyre maintenance can substantially reduce vehicle fuel consumption and fleet running costs. Some of the new purchase arrangements have led to some painful learning curves however for both tyre manufacturers and fleet operators. What are the key reasons for these unforeseen consequences and how has this impacted on the bottom line?

Given the challenging nature of 2005 this report is designed to help answer key questions facing road transport professionals in 2006, questions such as:

How do your practices compare to those of other fleet operators?

To what extent should you be considering outsourcing?

What returns can you realistically expect from technology solutions?

Where can you recognise further efficiencies within your operation?

What do fleet operators require most from technology solutions?

How are your competitors planning to achieve cost efficiency?

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