

COVID-19

Market Update 03-04-2020

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Demand

VOLUME DEVELOPMENT (1)

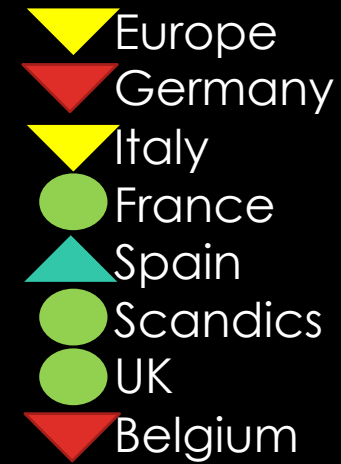


Supply

CAPAC DEVELOPMENT (2)

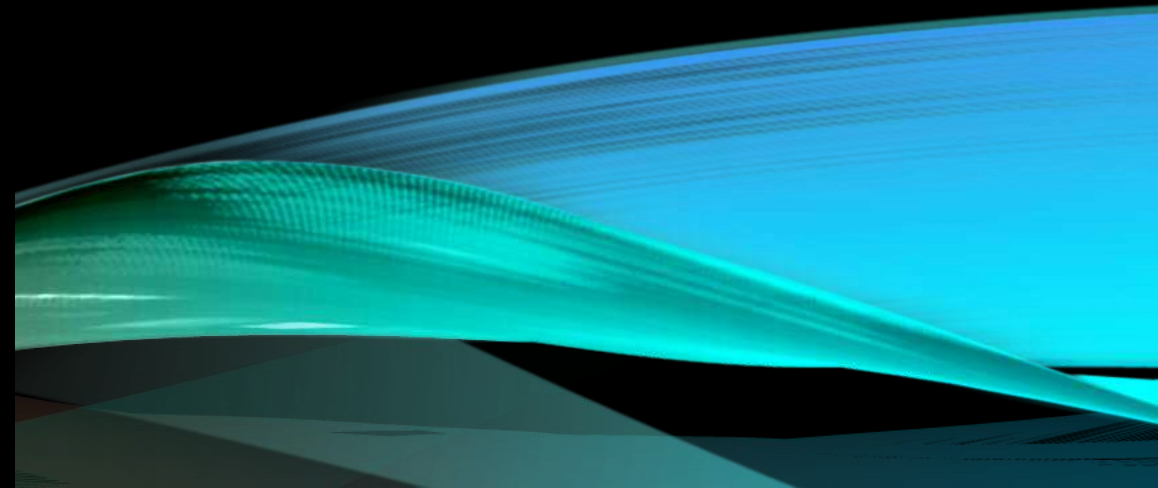


IMPACT ON COSTS (3)



WEEK 14

(1) SHIPMENTS AVAILABLE COMPARED TO PREVIOUS WEEK
(2) TRUCKS AVAILABLE COMPARED TO PREVIOUS WEEK
(3) COMPARED TO PREVIOUS WEEK



OTHER MARKET EFFECTS

Volume & Capacity

decrease in trucking capacity
in Europe:
-13% in average in EU

Rising rejection rates for
contracted shipments
+15% in average in EU

Industry output declines in all
European countries
Main affected: Italy, France, Spain,
BeNeLux

Industry Index

All industries affected by the
decline:

FMCG starts cooling down

Automotive declined by -40%

Construction & Steel stronger
decrease (shifting to spot market)

Wood & Timber constant slight
decrease in last two weeks
resulting in -20% (compared to
previous)

Corridor View

Domestic:

- Some remained stable (Germany)
- Strong decline in France, Italy and Spain
- Slight decrease in Austria and Romania

Cross-border:

- All corridors are affected by the **decrease in industry output**

MID TERM OUTLOOK - OPEN QUESTION

Transport (LSP)
costs increased
due to high
inefficiency

Lack of
demand
pushing prices
down
(sometimes
sharply)

Transport rates
reaching limit in
how some can
viably operate
in specific
corridors

How will those
with truck
capacity
react?
Hibernate or
collapse?

THANK YOU & SEE YOU

