

## Ti & Upply publish the European Road Freight Rate Benchmark Q4 2019

The second edition of this joint report shows that Q4 2019 road freight rates remained basically flat, with just 0.1% growth from Q3, despite the influence of peak season volumes.

- Q4 2019 average international European road freight rate steady at €1,102 up by just 0.1% from Q3, in spite of peak season volumes
- Average Q4 2019 rate €1.64/km
- With prices on just 14 of the 36 lanes measured growing it's clear that the European averages mask underlying volatility
- Largest q-o-q increase: Milan-Warsaw lane +8.8%
- Largest q-o-q decrease: Lille-Rotterdam and Lille-Antwerp both fell by 4.0%.

Transport Intelligence (Ti) & Upply have published the European Road Freight Rate Benchmark Q4 2019. The Q4 benchmark shows that **average European freight rates have increased by just 0.1% since Q3 2019**, reflecting a more moderate peak season and the status of rates at near historic heights.

**William Béguerie, Road Transport Expert at Upply, explains:**

*"Road haulage capacity has increased, provoking a demotivation in haulers' routine."*

With the European economy experiencing very limited growth in Q4 2019, retail and peak season consumption were expected to support demand and sustain road freight prices. In the event, rates remained basically flat, lowering expectations for Q1 2020 rates which will be without peak season volumes.

**Andy Ralls, Quantitative Analyst at Ti, says:**

*"Private consumption levels appear to be propping up Europe's economic growth, although in Q4, the retail sector does not appear to have done much to increase freight rates. Consequently, there is little evidence to show that the peak season provided a boost to road freight rates."*

Although the region-wide picture is fairly stable, the data also reveals **mixed experiences on individual lanes in Q4**.

- The Milan to Warsaw lane saw prices increase by 8.8% from Q3, as consumption growth in Poland accelerated through December to 5.7% year-on-year. Similarly the Paris to Warsaw lane also grew rapidly with an increase of 6.2% for the year.
- While lanes driven by domestic consumption saw price increases in 2019, the Q4 data highlights decreasing prices on export orientated lanes. For instance, prices from Lille to Rotterdam and Lille to Antwerp both declined by 4% from Q3.

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# Price transparency for shippers and carriers

The European Road Freight Rate Report is part of a collaboration between Ti and Upply. The partners aim to increase price transparency in the road freight market by providing benchmarking data for 36 key international European road freight lanes. The report data starts from Q1 2017 and provides weekly rates to track change in the market.

**Thomas Larrieu, Chief Data and Research Officer at Upply explains:**

*"The Ti/Upply quarterly report is market-driven. Following our readers' comments after the release of the first report, we have decided to share a new type of data: the average rate in €/km."*

Shippers paid an average rate of €1.64/km for road freight services in Q4 2019. The variation in this cost between different lanes is largely dependent on the length of the lane.

Upply, the freight marketplace for professionals, offers weekly data on road freight rates across Europe. The data analysis is provided by Ti's expert road freight analysts. Ti and Upply will continue to publish quarterly reports to help shippers and carriers benchmark their freight rates.

## About Upply

In keeping with our vision of a world where the supply chain is simple and fluid, Upply's mission is to reset the fundamentals of the supply chain market to help each player unleash their potential. Upply enables professionals to overcome the volatility and inefficiency of the market. To develop this unique solution, Upply employs data scientists, logistics and IT professionals, and digital experts. Launched in November 2018, Upply is based in Paris, and will soon be opening an office in Chicago to anticipate its expansion into the United States.

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## About Transport Intelligence (Ti)

Ti is the world's leading source of market intelligence for the logistics and road freight industry, providing data and analysis through its European Road Freight Transport report series, Global Supply Chain intelligence (GSCi) database and expert consultancy services.

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