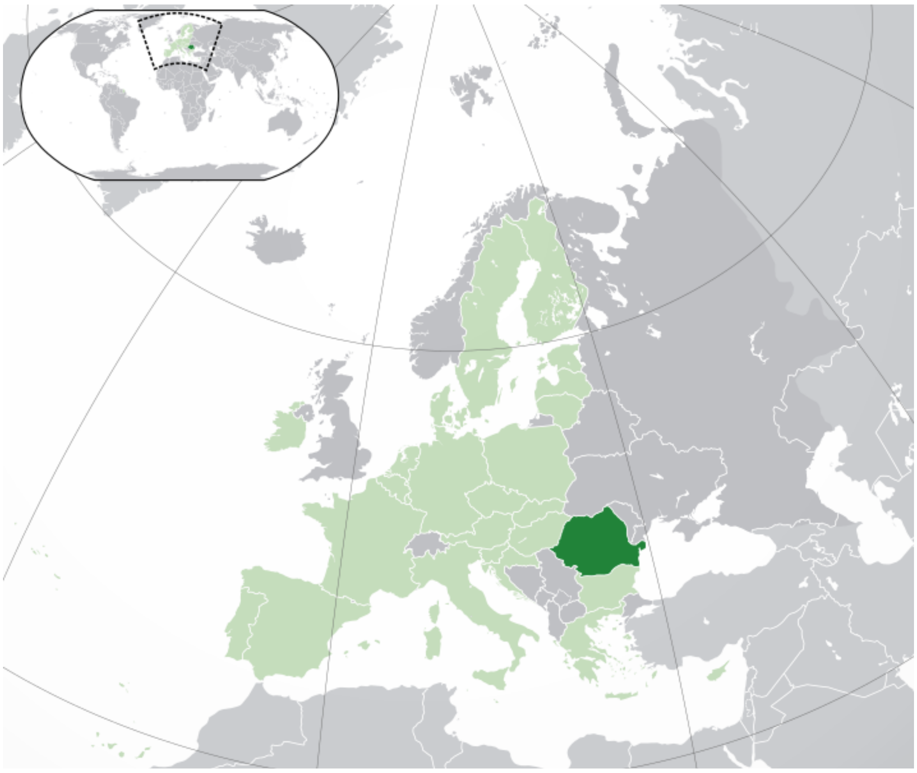
Comité National Routier

EUROPEAN STUDIES

Road freight transport in Romania in 2024



Comité national routier (CNR)

in collaboration with the Romanian Federation of Road Hauliers, UNTRR (Uniunea Nationala a Transportatorilor Rutieri din Romania)

EUROPEAN STUDIES

ROAD FREIGHT TRANSPORT IN ROMANIA

2024 study

Comité National Routier – Paris

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WARNING

Following on from the 2020 survey of the Romanian RFT sector, this study, which was conducted in 2023 and 2024, is intended to provide up-to-date figures on the sector's activities, as well as on the typical operating conditions and costs of a 40-tonne HGV operating internationally.

Some data have been updated with available figures for 2026. The standard profiles drawn up are nevertheless based on the economic conditions prevailing in 2023.

As the exchange rate of the Romanian leu fluctuated between 4.98 and 5.01 to the euro during the period covered by the study, an average exchange rate of 5 lei to the euro will be used throughout this study.

SUMMARY

Long regarded as one of the least developed countries in the European Union, Romania is now experiencing rapid development and is closing the gap with other European nations. This process of development continues to gain momentum, and its effects are evident on both the social and economic fronts.

The Romanian minimum wage rose from 115€ per month on 1 January 2007—the date the country became a member of the European Union—to 663€ at the beginning of 2024, and to over 800€ in 2025, a sevenfold increase in 18 years. Over the same period, driver travel allowances more than doubled. These significant increases are intended to stem the outflow of the country's workforce to Western European countries across all sectors.

Meanwhile, EU regulations relating to road haulage are now being applied more rigorously. In the face of inspections and criticism from its Western counterparts, Romania is ensuring that EU regulations are enforced, thereby bringing working conditions into compliance with statutory requirements. Costs are rising, but the Romanian haulage sector is becoming more efficient and its image is improving.

As far as infrastructure is concerned, the road network is expanding. Although often a politically charged issue, the expansion of the motorway network finally seems to be gathering pace. The railway lines have been electrified and the country's main towns and cities are now connected.

Regarding the evolution of costs in the road freight transport sector in recent years, two major events stand out. Firstly, the war in Ukraine, which has exacerbated labour market tensions due to the exodus of hundreds of Ukrainian drivers, sent fuel costs soaring, and has driven up the cost of vehicles. Secondly, changes to local labour legislation and the implementation of European driving regulations are leading to a reorganisation of working practices, resulting in a fall in hourly productivity and a rise in driver costs. According to the CNR's calculations, the hourly driving costs have risen by 14% over three years. The cost of fuel has risen by 49% and the cost of owning a vehicle by 56%.

All in all, the per-kilometre cost in the Romanian sector stands at 1.08€, up by more than 30% in the space of just a few years.

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1. ECONOMIC, LABOUR AND ENVIRONMENTAL CONDITIONS IN THE ROMANIAN RFT SECTOR

1.1. ROMANIA AT A GLANCE

Capital	Bucharest
Area	238,398 km^2
Population	19,036,031 inhabitants (2025)
Official EU language(s)	Romanian
Political system	Parliamentary Republic
President of the Republic	Nicușor Dan, since 26 May 2025
Prime Minister	Ilie Bolijan, since 23 June 2025
Minister for Transport	Ciprian Șerban, since 23 June 2025
Date of EU membership	1 January 2007
Date of joining the euro	Non-member of the Euro zone 1€ = 5 Romanian lei (RON)
Seats in the European Parliament	33 seats
European Commissioner	Roxana Mînzatu, Commissioner for Education, Quality Jobs and Social Rights, since 1 December 2024
Real GDP growth (%)	0.7% (Eurostat, 2025)
Inflation – CPI (%)	7.3% (Eurostat, 2025)
Unemployment rate (% of working population)	2.6% (Eurostat, 2024)
Balance of trade	-20.2 billion euros (European Commission, 2025)
Minimum gross monthly wage	4,050 lei, i.e. approximately 810€, as of 1 January 2026
Greenhouse gas emissions	4.03 tonnes per capita (2025)

1.2. ROAD FREIGHT TRANSPORT IN ROMANIA

1.2.1. TRANSPORT POLICY AND INFRASTRUCTURE

Transport policy

Transport policy in Romania is based primarily on the General Transport Master Plan (Master Planul General de Transport al României), adopted in 2016 and updated in 2021 to cover the period 2021–2030, as well as on the National Recovery and Resilience Plan (PNRR) and the Transport Programme 2021–2027, which form the strategic framework for the country's infrastructural development. All these documents are part of the process of integrating the Romanian network into the Trans-European Transport Network (TEN-T) and of bringing about the sector's environmental transition.[1]

The main objectives of this policy are:

- To develop a modern intermodal transport system that is safe, efficient and capable of promoting economic competitiveness and national cohesion.
- Complete the main corridors of the Trans-European Transport Network (TEN-T) in order to strengthen links with neighbouring countries, Black Sea ports and key European markets.
- To promote a shift from road to rail and inland waterways, in order to reduce greenhouse gas emissions and the environmental costs of transport.
- To accelerate the decarbonisation of the transport sector through the development of alternative fuels, electromobility and the digitalisation of infrastructure.
- To improve road safety, infrastructure resilience and the governance of public investment in transport.

As regards road transport, priority is being given to the expansion of the motorway network in order to address deficiencies in connectivity between the country's various regions. Investments are focused in particular on the A7 motorway (Moldavia Motorway), linking Bucharest to the north-east of the country, and the A8 motorway (Union Motorway), intended to improve the link between Transylvania and Moldavia. These infrastructure projects also constitute strategic routes within the TEN-T network and receive substantial European funding.[2]

Romania also attaches great importance to the modernisation of its rail network. Investments are aimed at upgrading the main European rail corridors, electrifying new lines, increasing

[1] Government of Romania, **Master Planul General de Transport al României** (adopted by Government Decision No. 666/2016; investment programme updated by Government Decision No. 1312/2021).

[2] European Commission, **Romania's Recovery and Resilience Plan – Component 4: Sustainable Transport** (PNRR)

commercial speeds, modernising stations and replacing rolling stock. The authorities wish to boost the competitiveness of both passenger and freight rail transport and to promote its integration with other modes of transport. [2]

Port and inland waterway infrastructure is another key focus of national policy. The modernisation of the port of Constanța, the main port on the Black Sea, together with the development of shipping on the Danube and multimodal logistics hubs, aim to strengthen Romania's role as a gateway for trade between Central Europe, the Balkans and the Black Sea region.

Finally, Romania's transport policy is fully in line with the European objectives regarding climate neutrality. The government plans to develop national charging infrastructure for electric vehicles and refuelling stations for alternative fuels, to implement the 'polluter pays' principle, the continued digitalisation of networks, and support for low-emission technologies – in particular rail and the use of hydrogen in heavy goods transport.[3]

Transport infrastructure and use

Modal split of freight transport in % (based on t-km)

2024	Road	Rail	Inland waterways
European Union	78.2%	16.6%	5.2%
Romania	55.4%	21.2%	23.4%

Source : Eurostat

Situated at the crossroads of Central and Eastern Europe and the Balkans, Romania is a strategic gateway between the European Union, the Black Sea region and the countries of the Caucasus and Central Asia. It shares borders with Hungary, Bulgaria, Serbia, Ukraine and the Republic of Moldova, which means it occupies a critical position in the European transport network. Transport infrastructure is mainly concentrated around Bucharest, but is also well developed around the regional centres of Cluj-Napoca, Timișoara, Iași, Brașov, Craiova and Constanța. However, the mountainous terrain of the Carpathians poses a significant obstacle to the development of transport infrastructure, particularly in terms of links between Transylvania and the eastern and southern parts of the country.[1]

The main transport corridors run along two major routes within the Trans-European Transport Network (TEN-T):

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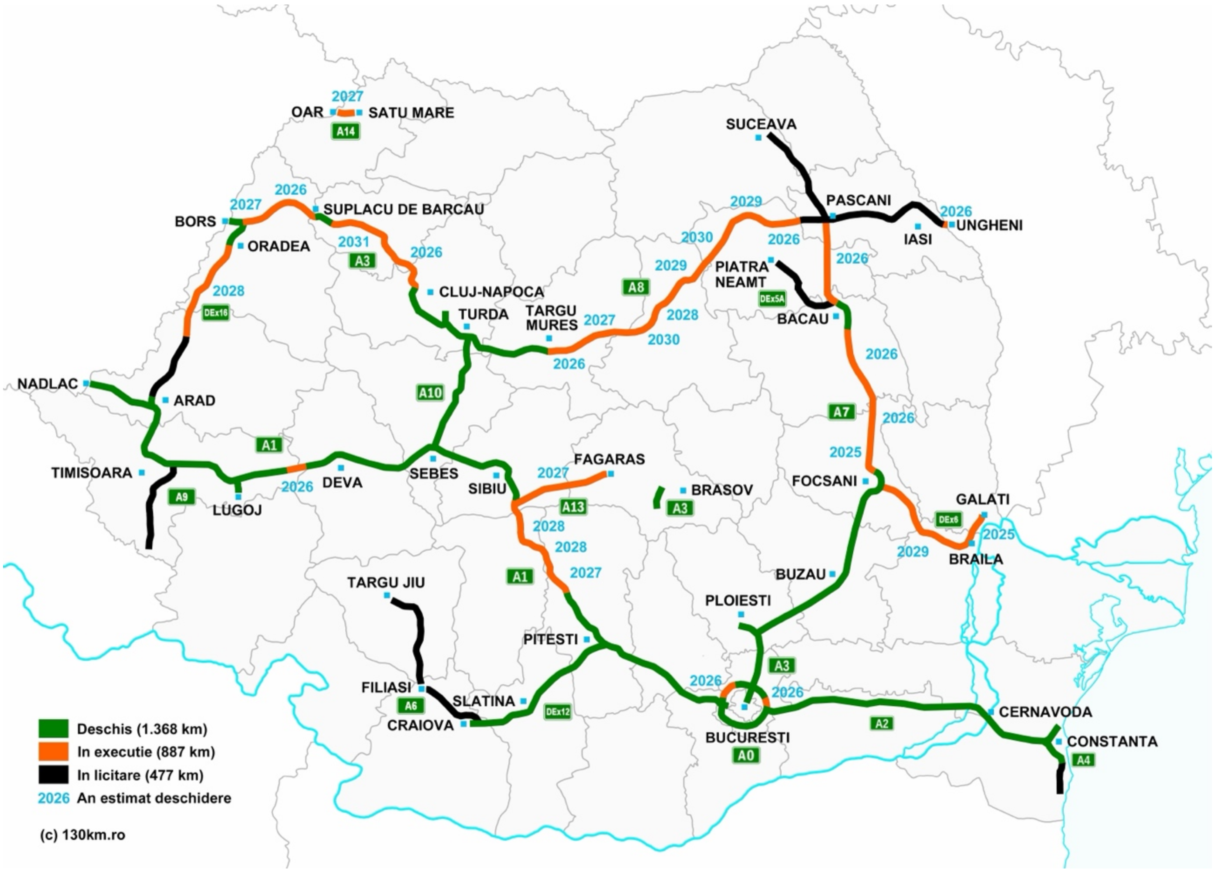
[3] European Commission, **Romania – Final updated National Energy and Climate Plan (NECP) 2021–2030**, 2024.

- the Rhine–Danube corridor, linking the Hungarian border (Nădlac, Arad) to Bucharest and on to the port of Constanța on the Black Sea;
- the Baltic Sea–Black Sea–Aegean Sea corridor, which runs through the north-east of the country towards the Republic of Moldova and Ukraine and plays a key role in strengthening links with the countries of Eastern Europe.[2]

Motorway network in Romania
(green: in operation, orange: under construction, black: planned)



The Romanian motorway network is still undergoing development. Long hampered by chronic underinvestment, there has been a significant acceleration in progress since 2021, thanks to funding from the National Recovery and Resilience Plan (PNRR) and European Cohesion Funds. Key priorities include:

- the completion of the A1 motorway, linking the Hungarian border to Bucharest and then on to Constanța via the existing network;
- the construction of the A7 motorway (Moldova Motorway) linking Bucharest to Pașcani and, eventually, to the Ukrainian border;
- the phased construction of the A8 motorway (The Union Motorway), linking Târgu Mureș to Iași and the Moldovan border via the Carpathians;

- the development of the Bucharest motorway ring road (A0), designed to improve the flow of national and international traffic.

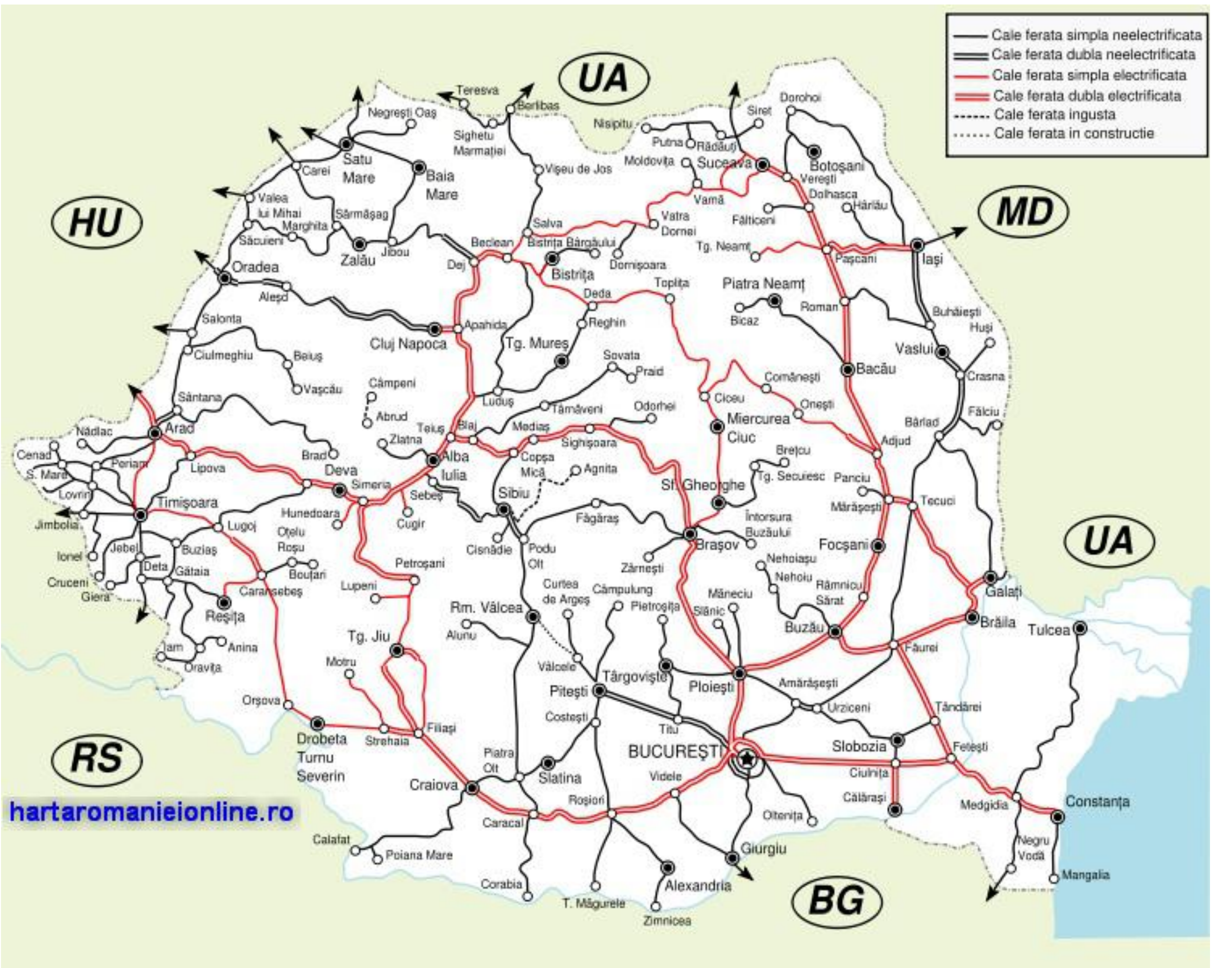
The national road network is managed by the Compania Națională de Administrare a Infrastructurii Rutiere (CNAIR), a state-owned company which reports to the Ministry of Transport and Infrastructure.

According to the CNAIR, Romania had approximately 1,300 km of motorways in operation in early 2025, with several hundred kilometres more under construction – mainly on the A1, A7, A8 and A0 motorways.[13]

While road transport dominates the freight sector, accounting for more than half of domestic freight, rail transport nevertheless retains a significantly higher share than the European average, largely thanks to international traffic and freight flows transiting through the port of Constanța.

Romanian railway network

(black: non-electrified; red: electrified; solid line: single track; double line: double track; dotted line: under construction)



The rail network is managed by the state-owned company Compania Națională de Căi Ferate CFR SA, which is responsible for the infrastructure, whereas CFR Călători provides passenger services, alongside several private operators.

With approximately 10,600 km of track, of which around 4,000 km is electrified, the Romanian rail network is one of the most extensive in Central and Eastern Europe. Investment is primarily focused on modernising European rail corridors, increasing commercial speeds (up to 160 km/h on the main lines), continued electrification, as well as the implementation of the European Rail Traffic Management System (ERTMS). At this stage, Romania has no plans to build high-speed rail lines comparable to those in Western Europe, but is prioritising the modernisation of the existing network.

Waterways

Freight transport by inland waterway accounts for nearly a quarter of the country's domestic freight transport, ahead of rail. The Danube and the port of Constanța are key strategic transport assets. Running through the south of the country for over 1,000 km, the Danube forms part of the Rhine–Danube waterway corridor. The port of Constanța, the most important port on the Black Sea, plays a vital role in trade with Central Europe, the Caucasus and Asia, a role that has been further strengthened since the start of the war in Ukraine.

Air transport

Air transport is dominated by Bucharest's Henri Coandă International Airport, which handles the majority of the country's passenger and air freight traffic and provides connections to all major European cities, as well as several destinations in the Middle East. There are also major regional airports in Cluj-Napoca, Timișoara, Iași, Sibiu, Craiova and Constanța, which support the economic development of the country's various regions.

Transport Infrastructures of Romania

	2021
Length of national routes	16,857 km
of which highways	1 137 km
Length of other secondary routes	68,853 km
Length of rail network	19,625 km
of which electrified	8,501 km
Length of inland water channels	179 km
Length of inland natural waterways	2,584 km

Source : Eurostat

1.2.2. ROAD FREIGHT TRANSPORT OPERATORS

Institutional stakeholders

Ministry of Transport and Infrastructure (Ministerul Transporturilor și Infrastructurii – MTI)

The Ministry of Transport and Infrastructure is responsible for formulating and implementing national transport policy. It draws up sectoral strategies, prepares draft legislation, oversees investment in infrastructure and ensures alignment with European policies, particularly with regard to the Trans-European Transport Network (TEN-T), the National Recovery and Resilience Plan (PNRR) and the EU Cohesion Fund. The Ministry also exercises supervisory authority over the main state-owned enterprises and agencies operating in the road, rail, maritime and aviation sectors.

National Road Infrastructure Management Company (CNAIR)

The National Road Infrastructure Management Company is the public body responsible for managing the country's network of roads and motorways. Operating under the supervision of the Ministry of Transport, it is responsible for the planning, construction, maintenance, modernisation and operation of key national road infrastructure. It is also responsible for managing tolls, issuing permits for oversized and special transport, as well as for overseeing major motorway projects funded by the State and the European Union.[4]

The Romanian Road Authority (Autoritatea Rutieră Română – ARR)

The Romanian Road Authority is the body responsible for the technical and administrative regulation of road transport. It issues European licences, professional permits, certificates of professional competence for hauliers and drivers, and accreditations for training centres. It also monitors compliance with road transport market rules and helps to enforce European regulations in the road haulage sector.[5]

National Road Transport Inspectorate (Inspectoratul de Stat pentru Controlul în Transportul Rutier – ISCTR)

The ISCTR is the national authority responsible for the regulating road transport. Its inspectors carry out roadside and on-site checks to verify compliance with regulations relating to driving and rest periods, vehicle weight and dimensions, cabotage, the transport of hazardous goods

[4] National Road Infrastructure Management Company (CNAIR), *Statutes and remit*; annual reports for 2024.

[5] The Romanian Road Authority (ARR),*Organisation, remit and the issuing of Community licences*.

and the conditions for access to the haulage market. The organisation also takes part in joint enforcement operations carried out with other Member States of the European Union.[6]

Road haulage trade organisations

UNTRR (Romanian Federation of Road Hauliers)

The National Union of Road Hauliers of Romania is the main representative organisation of road haulage and passenger transport companies. Founded in 1990, it brings together several thousand companies and represents the sector in dealings with national authorities, European institutions and international trade organisations such as the IRU.

The association plays an active role in shaping public policy in the area of road transport. Its main areas of focus are as follows:

- representing the interests of Romanian hauliers in dealings with the government and European institutions;
- promoting an open European transport market based on fair competition;
- calling for coordinated implementation of the EU's Mobility Package in order to reduce the administrative burden on businesses;
- supporting the development of road infrastructure and safe rest areas;
- supporting the sector's energy transition while ensuring that businesses retain their competitiveness;
- advocating for the continuation of agreements facilitating trade between the European Union, Ukraine and the Republic of Moldova, whilst calling for fair competition amongst hauliers.[7]

A second organisation, **FORT (Federația Operatorilor Români de Transport),** also represents the interests of road haulage companies (primarily SMEs), and takes part in national consultations on regulatory developments in the sector.

Union representation

The road transport sector is represented by several trade union organisations affiliated with the main national confederations. The largest is the National Federation of Transport Trade Unions (Federația Națională a Sindicatelor din Transporturi), which is affiliated with the BNS

[6] The National Road Transport Inspectorate (ISCTR), *Organisation and remit*.

[7] Romanian Federation of Road Hauliers (UNTRR), official positions, press releases relating to the Mobility Package, EU-Ukraine relations and infrastructure; IRU, profile of the organisation.

(Blocul Național Sindical) confederation. Other organisations are affiliated with Cartel Alfa or CNSLR-Frăția.

Trade unions negotiate collective sectoral agreements and are primarily involved in issues relating to pay, working conditions, driving and rest periods, vocational training, as well as occupational health and safety. They also take part in labour talks with employers' organisations and the Department for Transport when reforms affecting the sector are being introduced.

1.2.3. THE ROMANIAN RFT SECTOR IN 2024 – KEY FIGURES DATA

Structure of the Romanian RFT sector in 2024

Structure of the Romanian RFT sector in 2024

2024	Goods transported	Tonne-kilometers achieved		Average distance	Vehicle.kilometres achieved
	thousand tonnes	million t.km	%	km	million of vehicle.km
TOTAL	**322,610**	**67,357**	**100.0%**	**209**	**4,673**
Domestic transport	267,721	24,029	35.7%	90	1,659
International tranport	54,889	43,328	64.3%	789	3,015
International transport of goods loaded in Romania	9,607	12,760	18.9%	1,328	946
International transport of goods unloaded in Romania	7,862	10,324	15.3%	1,313	686
Cross-trade	26,209	17,524	26.0%	669	1,174
Cabotage	11,212	2,719	4.0%	243	207

Source : Eurostat

Accounting for over 64% of total activity, international transport is clearly the main focus of the Romanian sector. The country, which has recently become a centre of industrial production for many Western companies, has a high volume of road haulage activity. Added to this is its geographical position, at the crossroads between the European Union, Ukraine and Turkey. The Romanian haulage sector is capitalising on this momentum to expand its operations, primarily into the German and French markets, as well as on routes between various Western European countries. Consequently, cross-trade accounts for a quarter of its overall business.

Evolution of the Romanian RFT sector

Evolution of the Romanian RFT sector in million tonne-kilometres

In million t-km	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	AAGR*
TOTAL	**35,136**	**39,023**	**48,176**	**54,704**	**58,762**	**61,041**	**55,027**	**61,849**	**64,353**	**65,249**	**67,357**	6.72%
Domestic transport	12,136	12,068	13,140	13,548	14,358	16,675	17,281	20,458	21,994	22,313	24,029	7.07%
International transport	23,000	26,955	35,036	41,156	44,404	44,367	37,746	41,391	42,359	42,935	43,328	6.54%

*Average annual growth rate

Source : Eurostat

The Romanian sector has enjoyed steady growth over the past 10 years, apart from during the Covid pandemic in 2020. Domestic and international haulage operations have been growing at similar rates, with an average growth rate of around 7% over the last 10 years.

Cabotage

Cabotage under Romanian flag in the 3 main "cabotaged" countries

In million tonne-kilometres	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	AAGR*
Cabotage under Romanian flag	**1,403**	**1,755**	**3,038**	**3,921**	**3,725**	**4,083**	**3 404**	**3 183**	**2 874**	**2 894**	**2 719**	**7%**
in Allemagne	472	582	1,139	1,264	1,185	1,119	826	1,040	934	1,038	829	**6%**
in France	431	481	807	1,196	1,036	1,171	932	707	689	652	630	**4%**
in Italie	208	155	294	413	282	305	321	398	329	273	231	**1%**
Share of cabotage in Romanian transport %	**4.0**	**4.5**	**6.3**	**7.2**	**6.3**	**6.7**	**6.2**	**5.1**	**4.5**	**4.4**	**4.0**	**-**

*AAGR : average annual growth rate

Source: Eurostat

The trend in Romanian cabotage activity mirrors that of its international business as a whole. Germany alone accounts for nearly a third of Romanian cabotage. 62% of Romanian cabotage is focused on just three countries.

Cabotage in Romania

In million tonne-kilometres	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	AAGR*
Cabotage in Romania	57	74	64	108	64	79	33	82	64	69	114	7.18%
Penetration rate of cabotage*	0.47%	0.61%	0.48%	0.79%	0.45%	0.47%	0.19%	0.40%	0.29%	0.31%	0.47%	-
Market share cabotage**	0.89%	1.13%	0.88%	1.50%	0.79%	0.85%	0.34%	0.68%	0.49%	0.51%	0.78%	-

AAGR : Average annual growth rate

*cabotage foreign flag / (total domestic transport + cabotage under foreign flag)

**cabotage foreign flag / (domestic transport for hire and reward + cabotage under foreign flag)

Source : Eurostat

Cabotage by other European hauliers on Romanian soil remains negligible, with a penetration rate of less than 1%. The main hauliers involved in cabotage in Romania hail from Bulgaria and Hungary.

RFT companies

According to Eurostat statistics, there are approximately 43,000 road haulage companies in Romania, employing just over 164,000 people. Based on information gathered locally, this company count appears to include drivers registered as self-employed individuals without vehicles. In reality, the number of road haulage companies, as per the European Union definition, is likely closer to 30,000, with a domestic fleet totalling more than 155,000 vehicles.

RFT* Business Statistics in Romania

	2023
Number of enterprises	43,427
Number of persons employed	174,550
Number of employees	164,321
Net sales	15,258,210 k€
Costs	
Total amount of purchased goods and services	11,546,390 k€
of which merchandise	467,840 k€
of which materials, supplies and intermediate goods	400 k€
Personnal expenses	1,603,600 k€
of which wages and salaries	1,559,100 k€
of which social security costs	44,500 k€
Gross operating profit	2,142,740 k€

* Entreprises de TRM selon la nomenclature européenne NACE Rev2 - Classe H4941

Source : Eurostat

Vehicle numbers

There is little data available on the number of RFT vehicles in the Romania. The official data published by Eurostat may not fully reflect the reality on the ground, but it does give an idea of how the number of registered vehicles has changed over the last six years.

Vehicle Statistics in Romania							
		2019	2020	2021	2022	2023	2024
Road tractors	Total	146,646	152,601	161,100	167,926	175,328	184,953
	Less than 2 years	11,532	8,039	7,204	10,066	12,469	13,149
	2 to 5 years	20,921	21,186	18,944	14,664	12,399	13,326
	5 to 10 years	36,756	41,118	44,346	45,433	45,543	45,415
	10 to 20 years	64,400	65,403	68,307	70,883	74,105	78,048
	More than 20 years	13,337	16,855	22,299	26,880	30,812	35,015
Lorries >3.5 tonnes	Total	145,927	149,888	152,945	155,351	158,810	162,828
	Less than 2 years	3,070	3,496	3,643	3,364	3,545	4,221
	2 to 5 years	3,665	3,928	4,449	5,027	5,643	5,261
	5 to 10 years	7,068	7,192	7,080	7,250	7,801	9,148
	10 to 20 years	56,707	56,045	53,071	49,961	47,252	44,950
	More than 20 years	75,417	79,227	84,702	89,749	94,569	99,248
Lorries <= 3.5 tonnes	Total	797,135	839,103	877,319	904,827	925,750	956,895
	Less than 2 years	35,347	30,892	29,735	29,754	27,410	32,330
	2 to 5 years	46,311	53,166	55,729	52,472	49,366	45,371
	5 to 10 years	76,287	82,619	86,957	92,352	100,143	107,914
	10 to 20 years	461,843	456,711	442,492	421,684	393,884	366,418
	More than 20 years	177,343	215,715	262,406	308,565	354,947	404,862

Source : Eurostat

Vehicle Statistics in Romania - 2							
		2019	2020	2021	2022	2023	2024
Semi-trailers	Total	129,862	137,850	147,513	156,501	164,557	173,071
	20 000 kg or less	1,128	1,191	1,264	1,354	1,458	1,520
	between 20 001 and 30 0	4,260	4,321	4,388	4,464	4,557	4,717
	between 30 001 and 40 0	115,924	122,568	130,723	138,037	144,056	150,682
	over 40 000 kg	8,550	9,770	11,138	12,646	14,486	16,152
Trailers	Total	337,263	362,920	390,599	416,637	443,450	473,292
	750 kg or less	184,613	201,065	219,771	237,417	255,555	275,667
	between 751 and 3 500 k	109,563	118,335	126,865	134,912	143,208	152,351
	between 3 501 and 10 00	22,550	22,469	22,370	22,226	22,123	22,084
	over 10 000 kg	20,537	21,051	21,593	22,082	22,564	23,190

Source : Eurostat

1.3. FISCAL AND LABOUR REGULATIONS APPLICABLE TO ROAD FREIGHT TRANSPORT IN ROMANIA

1.3.1. COMPANY TYPES

Types of companies in Romania and their main characteristics
Partnerships
Authorized physical person - Sole proprietorship (Persoană Fizică Autorizată - PFA)
Number of partners and associates: only one physical person, maximum 3 employees
Minimum and/or maximum capital: no limitation
Liability of partners: the owner bears unlimited sole liability.
Individual entrepreneur (Întreprindere Individuală - II)
Number of partners and associates: only one physical person, maximum 8 employees
Minimum and/or maximum capital: no limitation
Liability of partners: the owner bears unlimited sole liability.
General partnership (Societatea în nume colectiv - SNC)
Number of partners: 2 partners or more, physical persons, at least one as associate and others as partners
Minimum and/or maximum capital: no limitation
Liability of shareholders: the liability of associates is illimited. The liability of partners is limited to the amount of the contributions
Capital companies
Limited liability company (Societate cu Răspundere Limitată - SRL)
Number of partners and associates: at least one person, maximum 50
Minimum and/or maximum capital: 1 RON minimum
Liability of shareholders: the liability of shareholders is limited to the amount of the contributions
Joint stock company (Societate pe Acțiuni - SA)
Number of partners and associates: at least two persons, no limitations in number and associates
Minimum and/or maximum capital: 90,000 RON minimum
Liability of shareholders: the liability of shareholders is limited to the amount of the contributions
Simplified joint stock company (SAS)
Number of partners and associates: at least two persons, no limitations in number and associates
Minimum and/or maximum capital: 90,000 RON minimum
Responsabilité des associés : la responsabilité des associés est limitée au montant des apports

Source : BNP Paribas

1.3.2. ROAD FREIGHT TRANSPORT TAXES

Corporation tax

As regards corporation tax, there have been no significant changes since the last edition of the study on the Romanian haulage sector, published in 2017. As a reminder, the corporation tax rate in Romania was reduced from 38% in 1995 to 16% in mid-2005. The rate has remained unchanged ever since.

On 1 February 2013, a tax regime known as the 'special scheme for micro-enterprises' was introduced. However, the turnover thresholds that determine when the higher tax rate applies were revised downwards in 2025 and 2026. Consequently, since 1 January 2026, small businesses with a turnover of less than 100,000€ (compared with 1 million euros in 2020, 500,000€ in 2024 and 250,000 in 2025€) pay 1% of their revenues in tax if they have at least one employee. For companies with earnings in excess of this threshold, their profits are taxed at a rate of 16%. The 3% tax on revenues was abolished at the start of 2026.

Companies wishing to switch to the profits-based tax regime are required to have a minimum share capital of 45,000 lei (equivalent to 900€) and at least 2 employees. All new companies, regardless of their size, are subject to the micro-enterprise scheme during their first tax year.

Tax incentives for certain economic sectors (IT, agriculture and construction) have also been abolished.

VAT

The standard VAT rate in Romania rose from 19% to 21% in August 2025. At the same time, the reduced rate of 9% was increased to 11%. The reduced rate is applied to certain food and cultural products, medicines and medical equipment. The second 'super' reduced rate of 5% has been eliminated.

Axle tax or Vehicle Tax (Impozitul pe mijloacele de transport)

Anyone who owns a vehicle (including motor vehicles and trailers) registered in Romania must pay an annual tax, with certain exceptions. This vehicle tax goes to the budget of the local government area where the company has its registered office. In the case of a leased vehicle, the tax is payable by the lessee for the entire duration of the contract. Vehicle tax rates have remained unchanged since the CNR's last study on the Romanian RFT sector, which dates back to 2020.

Heavy goods vehicle tax for lorries in Romania - remains unchanged since 2020					
Number of axles	**Maximum authorised weight (kg)**	**Annual tax rate according to type de suspension of driving axle (in RON)**		**Annual tax rate according to type de suspension of driving axle (in €)**	
		Air suspension or equivalent suspension	**Other type of suspension**	**Air suspension or equivalent suspension**	**Other type of suspension**
2 axles	12,000 – 12,999	- RON	133 RON	- €	27.81 €
	13,000 – 13,999	133 RON	367 RON	27.81 €	76.73 €
	14,000 – 14,999	367 RON	517 RON	76.73 €	108.10 €
	15,000 and more	517 RON	1,169 RON	108.10 €	244.42 €
3 axles	15,000 – 16,999	133 RON	231 RON	27.81 €	48.30 €
	17,000 – 18,999	231 RON	474 RON	48.30 €	*99.11 €*
	19,000 – 20,999	474 RON	615 RON	99.11 €	128.59 €
	21,000 – 22,999	615 RON	947 RON	128.59 €	198.00 €
	23,000 – 24,999	947 RON	1,472 RON	198.00 €	307.77 €
	25,000 and more	947 RON	1,472 RON	198.00 €	307.77 €
4 axles	23,000 – 24,999	615 RON	623 RON	128.59 €	130.26 €
	25,000 – 26,999	623 RON	973 RON	130.26 €	203.44 €
	27,000 – 28,999	973 RON	1,545 RON	203.44 €	323.03 €
	29,000 – 30,999	1,545 RON	2,291 RON	323.03 €	479.01 €
	31,000 and more	1,545 RON	2,291 RON	323.03 €	479.01 €

Heavy goods vehicle tax for road trains (tractor + semi-trailer) in Romania - 2020					
Number of axles	**Maximum authorised weight (kg)**	**Annual tax rate according to type de suspension of driving axle (in RON)**		**Annual tax rate according to type de suspension of driving axle (in €)**	
		Air suspension or equivalent suspension	**Other type of suspension**	**Air suspension or equivalent suspension**	**Other type of suspension**
2+1 axles	12,000 – 13,999	- RON	- RON	- €	- €
	14,000 – 15,999	- RON	- RON	- €	- €
	16,000 – 17,999	- RON	60 RON	- €	12.54 €
	18,000 – 19,999	60 RON	137 RON	12.54 €	28.64 €
	20,000 – 21,999	137 RON	320 RON	28.64 €	66.91 €
	22 000 – 22 999	320 RON	414 RON	66.91 €	86.56 €
	23,000 – 24,999	414 RON	747 RON	86.56 €	156.18 €
	25,000 and more	747 RON	128 RON	156.18 €	26.76 €
2+2 axles	23,000 – 24,999	128 RON	299 RON	26.76 €	62.52 €
	25,000 – 25,999	299 RON	491 RON	62.52 €	102.66 €
	26,000 – 27,999	491 RON	721 RON	102.66 €	150.75 €
	28,000 – 28,999	721 RON	871 RON	150.75 €	182.11 €
	29,000 – 30,999	871 RON	1,429 RON	182.11 €	298.78 €
	31,000 – 32,999	1,429 RON	1,984 RON	298.78 €	414.82 €
	33,000 – 35,999	1,984 RON	3,012 RON	414.82 €	629.76 €
	36,000 and more	1,984 RON	3,012 RON	414.82 €	629.76 €
2+3 axles	36,000 – 37,999	1,579 RON	2,197 RON	330.14 €	459.35 €
	38,000 and more	2,197 RON	2,986 RON	459.35 €	624.32 €
3+2 axles	36,000 – 37,999	1,395 RON	1,937 RON	291.67 €	404.99 €
	38,000 – 39,999	1,937 RON	2,679 RON	404.99 €	560.13 €
	40,000 – 43,999	2,679 RON	3,963 RON	560.13 €	828.59 €
	44,000 and more	2,679 RON	3,963 RON	560.13 €	828.59 €
3+3 axles or more	36,000 – 37,999	794 RON	960 RON	166.01 €	200.72 €
	38,000 – 39,999	960 RON	1,434 RON	200.72 €	299.82 €
	40,000 – 43,999	1,434 RON	2,283 RON	299.82 €	477.34 €
	44,000 and more	1,434 RON	2,283 RON	299.82 €	477.34 €

Source : Romanian Tax Code available on www.noulcodfiscal.ro

Tolls – Vinieta rutiera

In Romania, lorries are required to have an electronic sticker to use national roads and motorways, which amounts to a network of over 4,400 km in length. This system requires all road users to contribute to road maintenance. The toll sticker is compulsory not only on motorways but also on other national roads outside urban areas. It should be noted, however, that bridges – particularly those spanning the Danube – are subject to different rates.

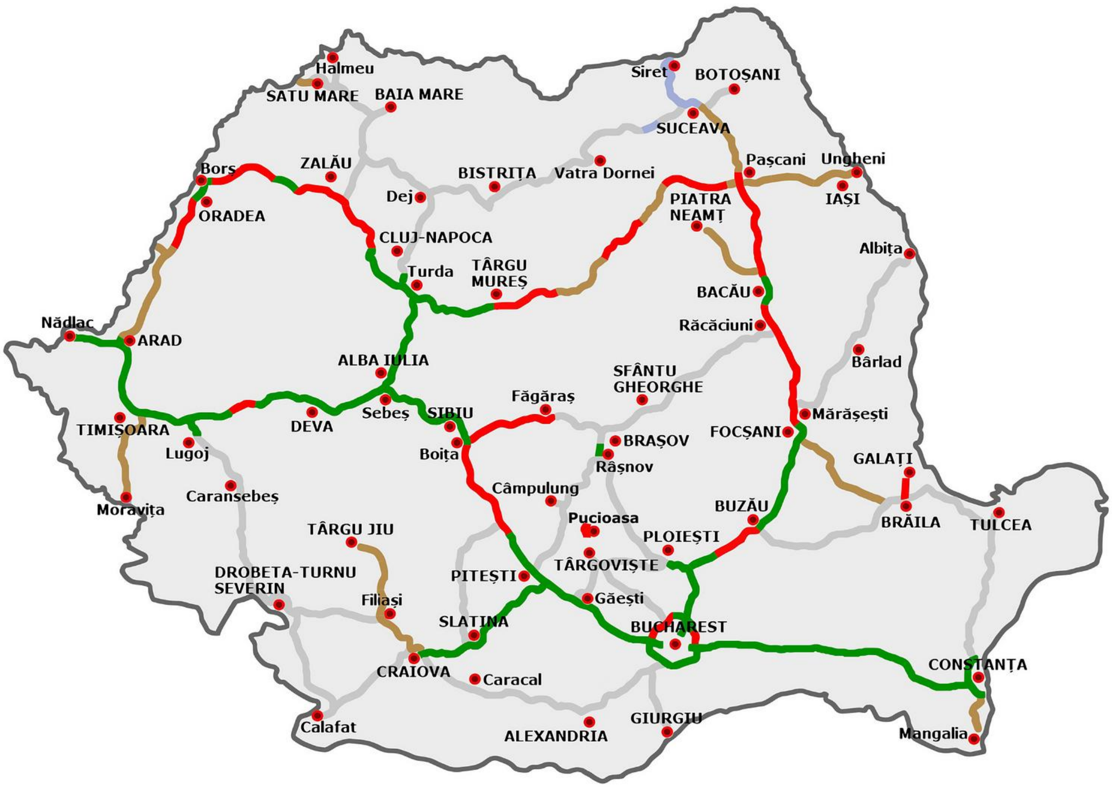
The sticker can be purchased online or at authorised sales points, which are often found at petrol stations. The following table shows the prices of stickers by vehicle type and period of validity. No refund is given for unused or partially used toll stickers, but a request may be made to change the vehicle registration number associated with the annual sticker.

Tolls - Romania - 2026					
Vehicles with maximum authorised weight between 0 and 3,500 kg					
Number of axles	**1 day**	**7 days**	**30 days**	**90 days**	**365 days**
All	10.00 €	13.50 €	21.50 €	34.00 €	114.00 €
Vehicles with maximum authorised weight between 3,501 and 7,500 kg					
Number of axles	**1 day**	**7 days**	**30 days**	**90 days**	**365 days**
All	7.50 €	19.00 €	38.00 €	n/a	380.00 €
Vehicles with maximum authorised weight between 7,501 and 12,000 kg					
Number of axles	**1 day**	**7 days**	**30 days**	**90 days**	**365 days**
All	13.00 €	33.00 €	66.50 €	n/a	665.00 €
Vehicles with maximum authorised weight over 12,000 kg					
Number of axles	**1 day**	**7 days**	**30 days**	**90 days**	**365 days**
Until 3 axles included	17.00 €	42.50 €	85.50 €	n/a	855.00 €
4 axles or more	28.50 €	71.00 €	142.50 €	n/a	1425.00 €

Source : Roviniete.ro

For heavy goods vehicles, the Calafat-Vidin and Giurgiu-Rousse border bridges between Romania and Bulgaria, as well as the bridges on the Fetesti-Cernavoda and Giurgeni-Vadui Oii motorways, are subject to a separate pricing system. Rates change frequently and the current prices can be found on the UNTRR website: https://www.untrr.ro/road-transport-information/bridge-tolls.html#.YDvJ0V1Kjt0

The following map shows the Romanian road and motorway network on which the toll sticker is required.



Source: www.rovinieta.ro

Excise duty on commercial diesel

In accordance with Directives 92/12/EC and 2008/118/EC, Romania has introduced a system of excise duties, with the rate set at the EU minimum of 33€/hl. This amount is converted to local currency once a year by the European Commission at the time of publication of the annual report. Over the following year, the exchange rate used to ensure compliance with the EU minimum does not change, even if the local currency loses value over the same period.

Since 2014, haulage companies have benefited from an excise duty refund scheme. There is no ceiling on the amount of duty that can be refunded. As a rule, this refund is only triggered if the excise duty applied to diesel for private use exceeds the minimum European rate (33€ per hectolitre).

As of 16 March 2026, excise duty stood at 280.43 RON/hl, i.e. 55.17 €/hl. Consequently, the partial refund stands at 65 RON per hectolitre, i.e. 12.79€ per hectolitre. This refund rate applied from 1 January 2026 to 31 March 2026.

The net rate of excise duty on commercial diesel is thus 42.38€/hl.

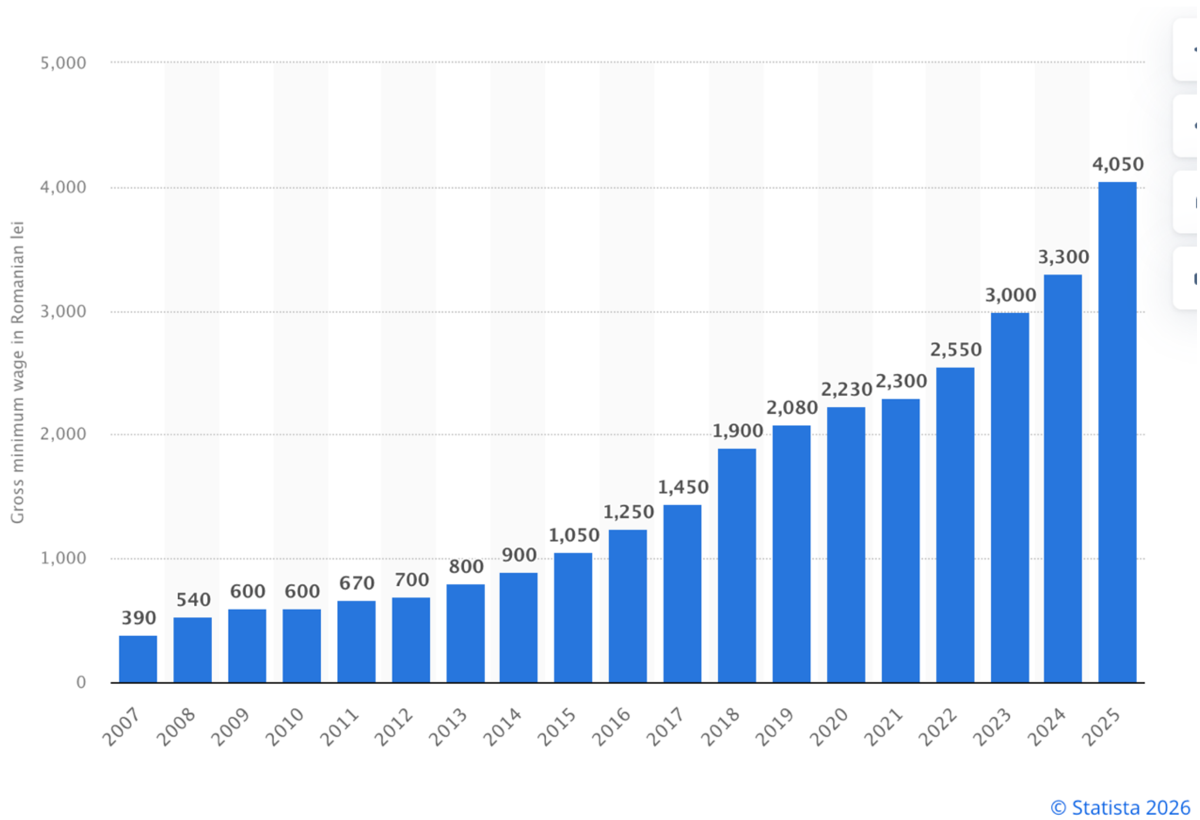
1.3.3. LABOUR REGULATIONS APPLICABLE TO ROAD FREIGHT TRANSPORT

Pay

When it comes to the evolution of the national minimum wage, Romania's case is rather unique. At the beginning of 2016, nine years after the country joined the European Union, its national minimum wage was still relatively low: 232€ gross per month. At the time, the employer's social security contributions stood at 22.84%, while the employee rate was 16.5%. Consequently, the total cost to the employer of an employee on the minimum wage in 2016 was 285€ per month (including social security contributions), with the employee taking home 194€.

Following far-reaching reforms, a large portion of employers' contributions was transferred to the employee, beginning in January 2018. Consequently, employer social security contributions rate dropped to 2.25%, while employee contributions shot up to 35%. To rebalance the system, the government significantly increased the minimum wage to over 466€ per month at the start of 2020, an increase of more than 100% in the space of 4 years. Since then, successive governments have introduced significant increases to the minimum wage; by 2025, it stood at over 800€ a month. By the end of July 2026, the minimum wage is expected to reach 4,325 RON, i.e. 865€.

Changes in the minimum wage in Romania between 2007 and 2026 (figures in Romanian lei)



Evolution of minimum wage in Romania				
Date	**Monthly amonth in RON**	**Yearly evolution in RON**	**Monthly amonth in €**	**Yearly evolution in €**
01.01.2026	4,050 RON	0,0%	797.00 €	-2.1%
01.01.2025	4,050 RON	22.0%	814.00 €	22.8%
01.01.2024	3,300 RON	10.0%	663.00 €	9.4%
01.01.2023	3,000 RON	17.6%	606.00 €	17.4%
01.01.2022	2 550 RON	10.9%	516.00 €	9.3%
01.01.2021	2,300 RON	3.1%	472.18 €	1.3%
01.01.2020	2,230 RON	7.2%	466.23 €	4.5%
01.01.2019	2,080 RON	9.5%	446.02 €	9.4%
01.01.2018	1,900 RON	52.0%	407.86 €	48.1%
01.07.2017	1,450 RON		318.52 €	
01.01.2017	1,250 RON	19.0%	275.39 €	18.7%
01.07.2016	1,250 RON		276.34 €	
01.01.2016	1,050 RON	7.7%	232.10 €	6.7%
01.07.2015	1,050 RON		234.77 €	
01.01.2015	975 RON	14.7%	217.50 €	14.4%
01.07.2014	900 RON		205.34 €	
01.01.2014	850 RON	21.4%	190.11 €	20.7%
01.07.2013	800 RON		179.36 €	
01.01.2013	700 RON	0.0%	157.50 €	-2.7%
01.01.2012	700 RON	4.5%	161.91 €	3.0%
01.01.2011	670 RON	11.7%	157.20 €	11.0%
01.01.2010	600 RON	0.0%	141.63 €	-5.0%
01.01.2009	600 RON	20.0%	149.16 €	7.6%
01.01.2008	500 RON	28.2%	138.59 €	20.2%
01.01.2007	390 RON	18.2%	115.27 €	28.5%
01.01.2006	330 RON	6.5%	89.67 €	13.9%
01.01.2005	310 RON	10.7%	78.70 €	15.7%
01.01.2004	280 RON	12.0%	68.03 €	-4.4%
01.01.2003	250 RON	78.6%	71.15 €	41.4%
01.07.2002	175 RON		52.38 €	
01.01.2002	140 RON	40.0%	50.33 €	21.5%
01.07.2001	140 RON		56.64 €	
01.01.2001	100 RON	42.9%	41.42 €	68.9%
01.01.2000	70 RON		24.53 €	

*Converted to euros using the official exchange rate on the date indicated

Source : Eurostat

Paid leave

Employees in Romania are entitled to a minimum of 20 days' paid leave. In addition, 17 days off are granted for national and religious public holidays.

Companies with a company agreement offer between 1 and 4 additional days of paid leave. This type of contract is common in haulage companies with more than 50 employees. The offer of 4 additional days of paid leave is now a key selling point used by road haulage companies to recruit and retain lorry drivers.

Travel allowances (Diurna)

Officially, there are two types of allowance in Romania: the first type, known as 'subsistence allowances' or 'Category 1 allowances', covers the cost of meals and local transport. Decree 518/1995 (amended in 2014 and in 2015, and unchanged since then) sets the minimum international daily allowance at 35€. For domestic trips, drivers are entitled to 23 lei per day, i.e. approximately 4.60€.

Private companies may pay Category 1 travel allowances that are up to 2.5 times the minimum rate without having to pay social security contributions on them. Above that amount, social security contributions apply. Furthermore, as long as they do not exceed this limit (i.e. 2.5 times the statutory minimum), travel allowances are not subject to income tax.

The second type of travel allowance is known as the 'accommodation allowances' or 'Category 2 allowances'. These cover reasonable accommodation expenses, if the employer has not paid for them directly. In this case, there is a country-specific allowance scale for public-sector employees. Employees in the private sector are entitled to accommodation allowances of up to 2.5 times the public sector rate; within this limit, such allowances are not subject to social security contributions or income tax.

With regard to lorry drivers, they are entitled to a subsistence allowance, but not to an accommodation allowance, as the sleeper cab provided by their employer is regarded as 'accommodation'. Drivers working internationally may thus receive a daily allowance of between 35€ and 87.50€, which is tax-free and not subject to social security contributions.

Regardless of the circumstances, the total monthly amount of travel allowances may not exceed three times the employee's gross salary.

Social security contributions

In 2016, the Romanian Government embarked on an overhaul of the social security system, resulting in a shift in contributions from employers to employees. Following the reform, the employer's social security contributions fell from 22.84% to 2.25%, and those of the employee rose from 16.50% to 35%, a rise offset by increases in the minimum wage.

There are two exceptions to this standard system. Jobs classified as ‘difficult’, such as any work regularly carried out at night, entitle the employee to an enhanced pension, funded by a special 4% contribution paid by the employer. In the case of jobs involving ‘special circumstances’, such as those of miners or healthcare workers, this special contribution rises to 8%. Truck drivers do not fall into either of these two categories.

Personal income tax

The amendment to the Romanian Tax Code (No. 227/2015) of 10 September 2015 introduced a significant reduction in personal income tax, which was cut to a flat rate of 10%, regardless of earnings. In force since 1 January 2017 (amended in 2022), this new personal income tax regime applies to disposable income (a term used to refer to income adjusted to account for social security contributions and a personal allowance, known as the personal deduction or DP).

This personal allowance is granted only to employees who perform their duties at their main place of work.

The following categories of individuals are entitled to this deduction:

- people whose income is below the maximum threshold set by law (gross minimum wage + 2,000 lei);
- parents or legal guardians with dependent children;
- young people under the age of 26 benefit from an additional 15% deduction on the minimum wage.

These personal deductions can be applied on a monthly basis, taking into account both income and the number of dependants, in accordance with a table published at the start of the year by the Ministry of Finance.

2026 rates for the personal allowance, which is subject to Article 77 of the Tax Code (as amended by Government Decree No. 16/2022), can be found at the following link:

https://sintact.ro/legislatie/monitorul-oficial/codul-fiscal-din-2015-legea-227-2015-16950032/art-77?unitId=art (77)

As of the end of 2023, a Romanian driver with no dependants, earning approximately 3,550 lei per month (i.e. the representative profile outlined at the end of this study), was entitled to deduct 270 lei from their taxable income.

2. CONDITIONS AND COSTS OF OPERATING A ROMANIAN 40-TONNE HGV INTERNATIONALLY

This part of the study describes the economic and labour conditions prevailing at the end of 2023, at the point when most of the interviews were conducted. In carrying out this study, the CNR has drawn on research focused primarily on the fiscal and labour aspects of the RFT sector, as well as on previous CNR surveys and feedback from the experts with whom the CNR collaborates. These different sources provide an overview of the Romanian international RFT sector and highlight the main developments since the last study. This research and process of dialogue are further backed up by interviews with Romanian hauliers and lorry drivers.

All the figures ultimately used by the CNR in order to construct the standard profile represent the best expert appraisal of this set of data sources.

2.1. BUSINESS OPERATING CONDITIONS AND COSTS

This section is mainly based on face-to-face interviews with 14 Romanian road freight transport companies involved in long-distance transport operations, mainly internationally. All the companies visited were able to provide the information requested. The 14 companies selected for the purposes of this study can be described as follows:

	Number of tractors	Number of semi-trailers	Main markets	Number of drivers
Company 1	11	11	DE, FR	12
Company 2	46	52	FR, IT	49
Company 3	220	243	FR, ES, IT	210
Company 4	170	166	DE, NL, DN	230
Company 5	126	148	DE, AT, Benelux	130
Company 6	62	58	FR, DE, UK	62
Company 7	45	60	SK, AT, PL, Scandinavie	50
Company 8	145	150	FR, DE, UK	134
Company 9	210	230	UE	235
Company 10	9	9	FR, IT	11
Company 11	21	23	CH, FR	24
Company 12	25	32	UE	26
Company 13	44	55	Europe Centrale	42
Company 14	5	5	FR	5

The companies visited for this study are extremely diverse in terms of their size and structure. They all specialise in international road haulage. Some of the companies are part of a chain of subcontractors working for local or regionally based companies.

For the purposes of comparison with data from the CNR's other national surveys, only companies whose main activity was international long-distance haulage were selected.

The findings in this report are based on interviews conducted by the CNR, and thus cannot be used for statistical purposes. However, they do shed some light on figures and information obtained elsewhere. Ultimately, the CNR uses the best available expert opinion to calculate the costs and operating conditions of a 'typical' HGV operating internationally.

2.1.1. TRANSPORT EQUIPMENT – Use

Romanian hauliers make intensive use of their vehicles. The number of days a vehicle is used varies between 225 and 280 days, with a clustering around 250 days per year.

The average annual mileage travelled by the vehicles of the hauliers we met ranged from 120,000 km to 150,000 km. According to its calculations (which are consistent with driver mileage) and based on expert opinion, the CNR has arrived at an estimated mileage figure of 135,800 km per year per vehicle.

The lifespan of vehicles varies depending on their make, the type of journeys they are typically used for, and companies' business strategies. Some large companies, which are able to negotiate favourable leasing contracts, are happy to replace their road tractors every 3 to 4 years, at the end of the contract, without exercising the purchase option. Small businesses use vehicles for approximately six years on international routes, followed in many cases by a further 2 years on domestic routes, before selling them.

To facilitate comparison with other countries, the CNR has established an average profile based on expert opinion, with a retention period for road tractors of 5 years, i.e. 4 years of leasing and a further 1 year of full ownership.

As regards semi-trailers, the reported use period of 7 years is below the average observed in Eastern Europe.

The tractor/semi-trailer ratio recorded in company surveys stands at 1.09, a figure slightly below that observed in other countries in the region.

2.1.2. TRANSPORT EQUIPMENT – Financing

The preferred method of financing rolling stock is leasing (typically under a lease-purchase agreement or, less commonly, a long-term lease), which accounts for over 90% of cases. Road tractors are often leased for 48 months and kept for a further 1 to 2 years after the end of the contract. Semi-trailers are leased for 5 years and kept for a total of 7 years. Interest rates on lease agreements stood at just over 3% in 2023.

48-month leasing contracts with a purchase option typically involve an initial payment of between 10% and 14% of the price of the vehicle, a high monthly payment and a purchase option at a symbolic 1% (or 1€) of the vehicle's original price at the end of the contract. Rental-only arrangements are not common practice when it comes to rolling stock. A few rare companies opt to purchase vehicles using their own funds.

The average purchase price of a new Euro VI class tractor reported in interviews with Romanian hauliers stood at approximately 95,200€. The purchase price of a semi-trailer is estimated at 26,600€. Information regarding the terms of leasing contracts gathered on-site have enabled us to calculate the annual cost of owning a 40-tonne articulated lorry: 19,539€.

2.1.3. FUEL

The average unit cost of fuel in 2023 was 1.2239€ per litre at the pump in Romania, according to official figures published in the European Commission's Oil Bulletin, taking into account the discontinuation of the partial recovery of excise duties in 2023.

Romanian companies made 60% of their fuel purchases in Romania, half of which were wholesale purchases (at a price of approximately 1.19€), with the other half being made at the pump.

During their frequent European trips, which often last more than three weeks, hauliers frequently need to refuel abroad. In such cases, they prefer to refuel in Luxembourg (15% of the total at a pre-VAT price of 1.223€ per litre), in France (10%), in Germany (5%) and in Hungary (10%).

The average unit price of a Romanian haulier's fuel basket is thus estimated at 1.2457€ per litre.

Average fuel consumption is estimated at 29.4 litres per 100 km, down from the average of 29.9 litres recorded in 2020.

2.1.4. MAINTENANCE & REPAIRS

Companies that take out maintenance contracts with the manufacturer for the duration of the lease pay an average of approximately 7,100€/year over 4 years. Some service contracts include tyre changes and other motorway services. These have to be disregarded for reasons of comparability.

On the other hand, large companies with their own maintenance garages report costs of 4,600€ per year per vehicle for this item. Meanwhile, companies that bought second-hand vehicles, particularly in 2022 and early 2023, spent more than 7,000€ on maintenance.

Consequently, estimating this highly variable cost item remains subjective and is based here on 'expert opinion'. In conclusion, we have arrived at a figure of 5,720€ for maintenance and repair costs, in the case of 40-tonne HGV without an all-inclusive maintenance contract.

This figure represents an increase of approximately 2.1% in the space of 3 years.

2.1.5. TYRES

Due to the varying tyre purchasing strategies and price differences between manufacturers – which can vary by as much as a factor of three – it is frequently difficult to calculate this cost item. In this respect, the Romanian haulage sector is similar to its European counterparts. Based on the information provided by companies, the cost of tyres is estimated at nearly 3,000€ per articulated lorry for 10% of firms that replace their vehicles every three years. It varies between 3,500€ and 7,100€ for 70% of companies with a profile similar to the standard profile used in this study. In the remaining cases, the figure stands at approximately 5,200€.

According to information provided by hauliers (including all profiles and operating practices), the annual cost of tyres for a 40-tonne articulated lorry is estimated at approximately 4,880€. This cost is 22% higher than the 2020 figure of 4,000€.

2.1.6. TOLLS

As regards tolls, virtually all companies complain about the substantial increase in this cost item due to widespread rises in motorway charges across Europe. As in most countries in Eastern Europe, the trend is towards passing on toll charges directly to customers, based on the route chosen and the time constraints involved.

The annual cost of tolls varies widely, ranging from 19,000€ to over 26,000€.

In the end, the CNR estimates this cost item at 22,800€ for a 40-tonne articulated lorry travelling approximately 135,800 km per year, with 80% of that distance covered on motorways and toll roads. Up by nearly 20% compared with 2020, this estimated cost includes the Romanian toll sticker but not the cost of the Eurovignette, which is not purchased by all Romanian hauliers.

2.1.7. INSURANCE

The cost of insurance are comparable with the regional average. According to hauliers, comprehensive insurance for a road tractor costs between 3,500€ and 5,000€ a year, and between 400€ and 600€ for a semi-trailer.

The estimated cost for this item is 4,350€ per year per vehicle, an increase of 21.5% compared with 2020.

2.1.8. AXLE TAX

According to the table provided in section 1.3.2 of this study, the annual axle tax in Romania for a 40-tonne, five-axle articulated lorry with air suspension, is 2,197 lei (approximately 439.40€).

2.1.9. FIXED COSTS

Information on fixed costs is often difficult to collect. Thanks to the cooperation of a large number of Romanian companies that the CNR was able to visit, this cost item is estimated at 7.5% of total costs in the case of haulage companies whose business is primarily conducted abroad.

2.2. EMPLOYMENT CONDITIONS AND DRIVER PAY

Employment conditions and driver pay in the Romania were surveyed during two rounds of interviews: a first phase in companies with employers; and a second phase, involving face-to-face interviews with drivers in car parks and rest stops. During this second phase, approximately twenty drivers, employees with Romanian contracts, agreed to be interviewed about their working conditions and pay.

Based on an analysis of these sources, the CNR has produced a typical profile (in terms of employment conditions and pay) of an RFT driver with a Romanian contract working internationally.

2.2.1. EMPLOYMENT CONDITIONS

Permanent contracts are the most widespread form of employment contract in the sector. New drivers are recruited directly on permanent contracts. Some large road haulage companies take on seasonal drivers on fixed-term contracts that offer a more attractive salary than permanent contracts, but this remains the exception within the sector.

The number of hours worked per month by Romanian drivers ranges between 200 and 235 hours, according to drivers' statements. Based on this data, it has been estimated that the average driver works 212 hours per month, over an 11-month period of full-time work. Certain drivers report occasionally working over 190 hours per month, but the companies we spoke to appear to comply with European regulations and state that working hours never exceed 190 hours per month (four weeks and two days), i.e. an average of 1,980 hours per year. The number of days worked per year is 243, ranging from 230 to 247 days. It is estimated that drivers in the Romanian sector work 45 weeks per year.

The drivers surveyed reported having 22 days' leave per year (with an average of 4.2 years' service). Many more experienced drivers reported receiving 24 days' paid leave. The youngest frequently receive the minimum of 21 days. A large proportion of paid leave is taken during the summer, particularly in August. It should be noted, however, that some drivers say they work for another employer during their periods of paid leave in order to boost their earnings.

In terms of working arrangements, Romanian drivers engaged in international haulage generally spend 19 to 20 nights a month abroad, which accounts for nearly 90% of their workload. Work schedules reported by drivers now comply with European regulations. Lengthy trips have been shortened. Drivers report that, in over 80% of cases, they now undertake three-week trips and have 4 to 7 days' rest upon their return to base.

Lastly, as regards average driver mileage, company surveys indicate that this figure is between 110,000 km and 132,000 km per year. On the other hand, drivers report driving an average of 129,000 km per year, which is at the upper end of the range. The average figure used in this updated study on the Romanian road haulage sector in 2023 is 127,000 km per year, slightly down on 2017. Virtually all drivers employed mainly on international assignments report that they drive the regulatory maximum of 90 hours over a two-week period.

It should be noted that companies report being affected by a shortage of drivers. The significant increase in travel allowances aimed at retaining drivers appears no longer to be sufficient. The departure of Ukrainian drivers has not been offset by the arrival of drivers from more farther afield.

The driver/tractor ratio, calculated based on interviews with companies, is 1.07.

NOTE ON THE BREAKDOWN OF DRIVER COSTS

International driver pay

Drivers on Romanian contracts receive a fixed monthly salary above the minimum wage, amounting to approximately 710€, including bonuses. New drivers hired on the minimum wage report that they receive a significant pay rise after 6 to 12 months' service. Company-level agreements, which are common in the sector, frequently once an employee has worked for a certain length of time – 12 months in most cases.

In addition to their monthly salary, Romanian drivers receive international travel allowances based on the length of trips. The daily rates of these allowances reported by drivers tend to be very consistent. The country visited makes no difference to these rates. In fact, Romanian companies are obliged to pay a minimum daily travel allowance of 35€ and are permitted to pay up to 2.5 times this minimum (i.e. 87.50€) without deducting social security contributions.

In practice, daily travel allowances are negotiated on an individual basis at the time of recruitment and depends on factors such as workload and the type of trips assigned by the employer. Evidence suggests that the maximum allowance is frequently paid.

According to the CNR's calculations, a driver working exclusively internationally and making a mixture medium and long journeys could be entitled to 1,634€ in travel allowances.

Based on the information gathered, the total cost of a driver comes to 26,686€ annually.

TYPICAL PROFILE OF A DRIVER WITH A ROMANIAN CONTRACT WORKING INTERNATIONALLY AND BREAKDOWN OF THEIR COST

Standard profile of an international driver - Romania - end of 2023	
Characteristics	- 90% of driver's work realized on international routes. - Long distance international itineraries (France, Germany, Spain, Benelux, Austria, Italy) - Returning to the base of a round of 3 weeks, floowed by 5 days of break at home. This profile is the adapted to the new european regulations. - 22 paid holidays, all taken mostly in summer season. However, the weekly break after the last monthly round is usually deducted from the official paid leave. - Income composed of a fixed salary close to the national minimum wage, completed by a variable part composed of travel allowances which is negociated on individual level. - Travel allowances usually reflect the reality and their amounts are respected. - Monthly working time often over 210 hours, and driving time about 180 hours and more. Information absent on payslips.
Annual mileage achieved	127,000 km
Number of actual working days per year	243
Number of working weeks per year	45
Number of driving hours per year	1,980

Cost breakdown of a standard Romanian international driver end of 2023					
Presentation of a standard pay slip					
EMPLOYER			EMPLOYEE		
Gross salary	**€/month**	**710.00 €**	**Salaire Brut**	**€/month**	**710.00 €**
Fixed gross salary	€/month	690.00 €	Fixed gross salary	€/month	690.00 €
Other bonuses and extras (on monthly basis)	€/month	20.00 €	Other bonuses and extras (on monthly basis)	€/month	20.00 €
Cotisations sociales	**2.25%**	**15.98 €**	**Cotisations sociales**	**35.00%**	**248,50 €**
Health insurance - cash benefits	2.25%	15.98 €	Health insurance - cash benefits	0.00%	0.00 €
Health insurance - benefits in kind	0.00%	0.00 €	Health insurance - benefits in kind	10.00%	71.00 €
Pension contribution	0.00%	0.00 €	Pension contribution	25.00%	177.50 €
			Income tax after deductions	**10.00%**	**31.94 €**
Monthly salary after payment of contributions		**725.98 €**	**Net salary after social contributions and income tax**		**429.56 €**
Travel allowances for a full working month (10,5 months in a year)		**1,634.00 €**	**Travel allowances for a full working month (10,5 months in a year)**		**1,634.00 €**
Monthly cost of a driver for a month of full activity		**2,359.98 €**	**Net income of a driver for a month of full activity**		**2,063.56 €**

Breakdown of annual cost of a standard Romanian driver in 2023					
Fixed gross salary + bonuses * 12 months		8,520.00 €	Fixed gross salary + bonuses * 12 months		8,520.00 €
Employer's social contributions * 12 months		191.70 €	Employee's contributions and income tax * 12 months		3,365.28 €
Salary cost after payment of contributions * 12 months		8,711.70 €	Net fixed income after income tax * 12 months		5,154.72 €
Travel allowances * 10,5 months		17,157.00 €	Travel allowances * 10,5 months		17,157.00 €
Total annual cost		**25,868.70 €**	**Annual net income**		**22,311.72 €**
Cost of one hour of driving in €		**13.07 €**	**Average monthly net income**		**1,859.31 €**
Cost per kilometre in €		**0.20 €**			

Source : CNR European studies

Since the 2020 study on the Romanian haulage sector, drivers' basic salaries rose by 30% over a three-year period (driven by the country's economic revival), while mileage driven fell slightly. Meanwhile, travel allowances also rose by more than 4%. Consequently, driver costs in 2023, as calculated by the CNR, were 11% higher than in 2020. Thus, the cost of an hour of driving has risen to 13.07€ (compared with 11.81€ in 2020) and the per-kilometre cost to 0.20€, compared with 0.18€ in 2020.

2.3. OVERVIEW OF CONDITIONS AND COSTS OF OPERATING A 'TYPICAL' HGV INTERNATIONALLY

Operating conditions and costs for a 40-tonne HGV operated on long distance international routes, 2023 values		
	unit	**Roumanie** *Simulation*
Yearly mileage of a vehicle	km	135,800
Number of operating days	days/year	250
Semitrailer/tractor ratio		1.09
Cost of one driver	€/year	26,686
Driver/tractor ratio		1.07
Yearly cost of vehicle financing and possession	€/year	19,539
Average consumption per 100 km	litres	29.4
unit fuel price, 2023 average	€/litre	1.2457
Yearly fuel cost	€/year	49,651
Maintenance-repair	€/year	5,720
Tyres	€/year	4,880
Tolls and vignettes	€/year	22,800
Insurance (vehicle)	€/year	4,350
Axle tax and other vehicle taxes	€/year	439
Synthesis - cost price (excluding overhead costs)		**135,933**
Cost/mileage ratio per annum	€/km	1.00
Overhead costs	€/year	11,022
Synthesis - complete cost price		**146,955**
Complete cost per kilometer	€/km	1,08

Source : CNR European studies

According to CNR calculations, the per-kilometre cost of operating a Romanian 40-tonne HGV internationally (excluding fixed costs), was 1.00€, compared with 0.76€ in 2020 (i.e. an increase of 31% compared with our previous study). This increase is largely due to increases in driver and vehicle costs, as well as in the price of fuel. There has been a slight fall in fuel consumption, but the gains in terms of annual cost are undermined by the cyclical rise in the price of diesel in 2023 (+49%).

In conclusion, when fixed costs (estimated at approximately 7.5% of total costs) are factored in, the overall cost at the start of 2023 amounted to 1.08€.

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