



Comité National Routier



EUROPEAN STUDIES

The Portuguese road freight transport sector

2022 study



Comité national routier

In collaboration with
Interface Transport

EUROPEAN STUDIES

The Portuguese road freight transport sector

2022 study

Comité national routier - Paris

www.cnr.fr – cnr@cnr.fr

The map on the cover comes from <https://commons.wikimedia.org/wiki/File:EU-Portugal.svg>

WARNING

Following on from the 2019 survey of the Portuguese RFT sector, this study, which was conducted in 2022, 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 from 2023 to the first half of 2025. The standard profiles drawn up are nevertheless based on the economic conditions prevailing in 2022.

SUMMARY

The Portuguese RFT sector continues to be marked by a high level of international activity, which accounts for more than two-thirds of its total business. Since 2019, when the previous CNR study was carried out, the Portuguese RFT sector has experienced major labour market changes.

The new collective agreement (CCTV) signed on 8 December 2019 has increased legal minimum rates of pay (basic gross pay, seniority-related pay, bonuses, travel allowances), requires the payment of a flat-rate night work allowance for domestic activity, as well as singling out and granting special benefits to drivers engaged in the transport of hazardous materials. In addition, the payment of two hours overtime per day (clause 47) introduced in the previous collective agreement has been maintained.

Overall, driver costs rose by an average of 5.47 %/year between 2019 and 2022, bringing the total to 35,176 €/year in 2022.

In addition to driver costs, fuel costs have risen sharply compared with 2019: +37.1%. This increase was mainly due to the surge in energy prices following the outbreak of war in Ukraine. Other cost items have changed only slightly and remain broadly unchanged compared with 2019.

Portugal is notable for having introduced regulations in 2021 governing the loading and unloading of goods by drivers. It is now forbidden for drivers, regardless their nationality, to load or unload goods in Portugal. Some exceptions remain, such as deliveries in urban areas or fuel transport. In addition, premium is applied for waiting times in excess of 2 hours.

In another change, transport companies no longer qualify for “veículo longo” status, which enabled them to halve the amount of axle tax they paid.

Ultimately, according to the CNR's calculations, the cost price in 2022 of a Portuguese 40-tonne HGV operating internationally stood at 1.13€/km, an increase of almost 17% compared with 2019

CONTENTS

WARNING	1
SUMMARY	7
1. ECONOMIC, SOCIAL AND ENVIRONMENTAL CONDITIONS IN THE PORTUGUESE SECTOR	11
1.1. PORTUGAL AT A GLANCE	11
1.2. ROAD FREIGHT TRANSPORT IN PORTUGAL	11
TRANSPORT POLICY AND INFRASTRUCTURE	11
ROAD FREIGHT TRANSPORT OPERATORS	17
PORTUGUESE RFT SECTOR - KEY DATA	18
1.3. FISCAL AND LABOUR REGULATIONS APPLICABLE TO ROAD FREIGHT TRANSPORT IN PORTUGAL	22
ROAD FREIGHT TRANSPORT TAXES	22
EMPLOYMENT REGULATIONS APPLICABLE TO ROAD FREIGHT TRANSPORT	23
2. CONDITIONS AND COSTS OF OPERATING A PORTUGUESE 40-TONNE HGV INTERNATIONALLY	29
2.1. BUSINESS OPERATING CONDITIONS AND COSTS	29
TRANSPORT EQUIPMENT - Use	30
TRANSPORT EQUIPMENT - Financing	30
FUEL	30
MAINTENANCE & REPAIRS	31
TYRES	31
TOLLS	31
INSURANCE	31
AXLE TAX AND OTHER VEHICLE TAXES	31
FIXED COSTS	32
2.2. EMPLOYMENT CONDITIONS AND DRIVER EMPLOYMENT COSTS	33
WORKING CONDITIONS	33
NOTE ON THE BREAKDOWN OF DRIVER COSTS	33
TYPICAL PROFILE OF A DRIVER WITH A PORTUGUESE CONTRACT WORKING INTERNATIONALLY AND BREAKDOWN OF THEIR COST	35
2.3. OVERVIEW OF CONDITIONS AND COSTS OF OPERATING A "TYPICAL" HGV INTERNATIONALLY	36

1. ECONOMIC, SOCIAL AND ENVIRONMENTAL CONDITIONS IN THE PORTUGUESE SECTOR

1.1. PORTUGAL AT A GLANCE

Capital	Lisbon
Area	92,227 km ²
Population	10,467,366 inhabitants (Eurostat, 2023)
Official EU language(s)	Portuguese
Political system	Semi-presidential republic
Head of state	Marcelo Rebelo de Sousa
Head of government	Luís Montenegro
Minister for Infrastructure	João Galamba
Date of EU membership	1 January 1986
Seats at the European Parliament	21 MEPs
Currency	Euro
European Commissioner	Maria Luis Albuquerque, in charge of Financial Services and the Savings and Investment Union
GDP growth (%)	5.5% (Eurostat, 2021)
Inflation (%)	8.1% (Eurostat, 2022)
Unemployment rate (% of working population)	6.6% (Eurostat, 2021)
Balance of trade	- 6,397,200€ (Eurostat, 2021)
Minimum monthly wage	823€/month (Eurostat, S2 2022)
Greenhouse gas emissions	4.9 tonnes/capita per year (EEA, 2021)

1.2. ROAD FREIGHT TRANSPORT IN PORTUGAL

TRANSPORT POLICY AND INFRASTRUCTURE

Transport policy - climate and environment

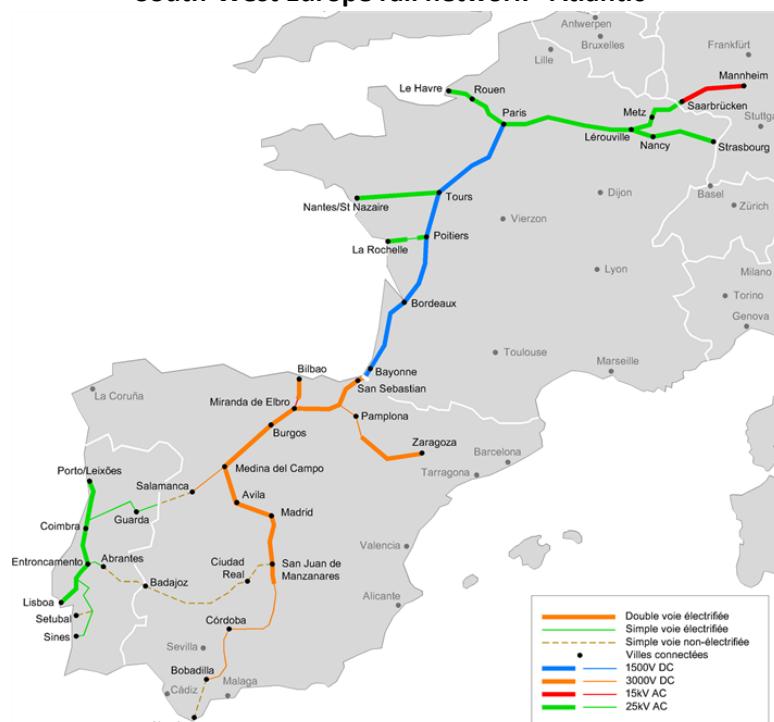
Plans to support multimodality

Since Portugal joined the EU in 1986, the country has focused its infrastructure development on increasing the density of its road and motorway network, largely at the expense of its rail network. As a result, ageing rolling stock and the disrepair of the country's rail system are major issues. In 2016, almost 60% of the Portuguese rail network was considered to be in either poor or very poor condition. This is leading to a deterioration in the service offered, with the operator "Comboios de Portugal" regularly having to cancel trains. To remedy the situation, a 168€ million call for tenders was announced with a view to acquiring 22 trains. This is the first such procurement process for over 20 years, a clear indication that investment in this sector has been lagging behind. In addition, in its

National Investment Plan 2030, the government earmarked 1.5€ billion to improve rail services between Lisbon and Oporto, in order to reduce journey times to under 2 hours.¹

When it comes to international rail, Portugal, like Spain, is handicapped by its standard gauge of 1,668mm, while the rest of the European network is based on a 1,435mm standard gauge. This requires constant changes of locomotive and rail-road transshipment at the border with France. As a result, trade between the peninsula and the rest of the continent is hampered. Rail development in Portugal, and international rail freight in particular, is underpinned by the TEN-T (Trans-European Transport Network), an EU programme designed to bolster rail infrastructure and its interoperability along nine strategic corridors in Europe. The Atlantic corridor, which links Lisbon to Strasbourg in France, is one of these strategic corridors. The creation of a line between the Port of Sines and Badajoz, to eliminate the need to pass through Entroncamento on the first line described above, is one of the projects being undertaken as part of the TEN-T programme.² This route is intended to be used primarily for freight, with passenger transport planned to be introduced only at a later stage.

South-West Europe rail network - Atlantic³



Source: Mediarail

The Portuguese government also has a number of plans for the development of inland waterway and maritime transport, with the aim of strengthening Portugal's position as a "global logistics hub". These objectives are outlined in the "Strategy for Increasing Port Competitiveness 2016-2026", which provides for investments of 2.5€ billion between now and 2026. The planned investments are aimed in particular at modernising and consolidating port infrastructure in order to increase their capacity

¹ Rail transport in Portugal. DG Trésor. July 2019. <https://www.tresor.economie.gouv.fr/Articles/543dd555-2a9e-4480-b6b2-37a434213ac1/files/2e3e59d6-6708-4002-bdaf-6f9bfd7c2266#:~:text=Le%20r%C3%A9seau%20ferroviaire%20portugais%20comprend,1.639%20km%20de%20lignes%20%C3%A9lectrifi%C3%A9es.>

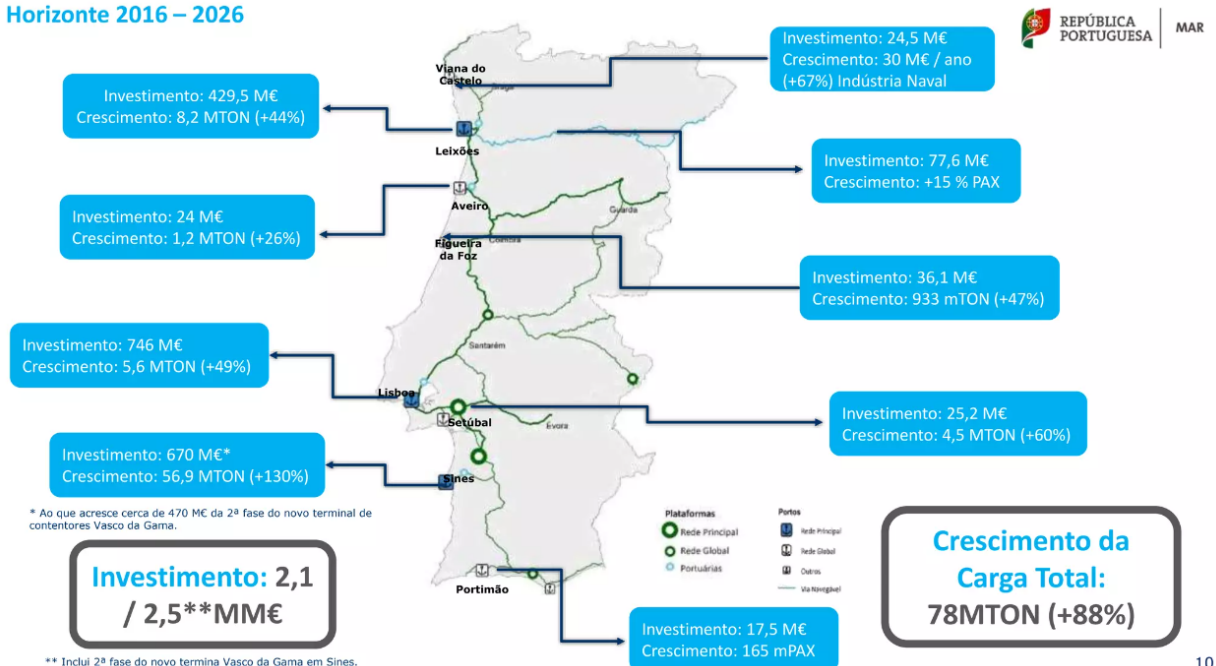
² <https://mediarail.wordpress.com/2021/01/05/comment-leurope-ameliore-le-fret-ferroviaire-en-espagne-et-au-portugal/>

³ <http://mediarail.be/Fret/Corridors/Atlantique/ATL.htm>

and strengthen their positioning on certain markets, such as the transport of liquefied natural gas (LNG). They also aim to support a shift from road to river or rail when it comes to connecting to and from ports. Overall, this strategy is designed to boost maritime traffic by 88% between now and 2026. It should be noted that this strategy also includes the development of "port clusters", aimed at promoting innovation in terms of the digitalisation of ports and at developing renewable energy production infrastructure within ports as well as offshore (wind turbines, for example).⁴

Mapping of planned investments under the "Strategy for increasing port competitiveness 2016-2026" in Portugal⁵

Horizonte 2016 – 2026



Source: Association of Ports of Portugal

The "National Energy and Climate Plan"

Portugal's "National Energy and Climate Plan (PNEC) 2021-2030"⁶ is the key national policy instrument setting out the strategic objectives for the next decade in terms of energy and environmental policy, with the longer-term aim of achieving the country's goal of achieving carbon neutrality by 2050. This Plan is in line with EU targets, including a 45% to 55% reduction in greenhouse gas (GHG) emissions and achieving a 47% share of renewable energies in overall energy consumption (20% in transport). Between 2005 and 2020, Portugal reduced its greenhouse gas emissions by between 18% and 23%, while the share of renewable energies now stands at 25% (10% in transport).

To meet its targets, the PNEC is set to invest up to 18.7€ billion in the energy sector. Portugal intends to use this funding to invest in solar energy, offshore wind power and hydrogen. The plan also aims to ensure that by 2030 a third of individual vehicles sold in Portugal are electric.

⁴ Strategy for increasing port competitiveness. 2016-2026. Ministry for the Sea.

⁵ <https://pt.slideshare.net/portosdeportugal/estrategia-para-o-aumento-da-competitividade-portuaria-horizonte-20162026-70284013>

⁶ <https://www.portugalenergia.pt/setor-energetico/bloco-3/>

"The National Hydrogen Strategy"

To support the PNEC, Portugal has defined a specific strategy for the development of hydrogen ("EN-H2" strategy).⁷

Approved in September 2020, this strategy calls for the implementation of a network of between 50 and 100 hydrogen refuelling stations, as well as the construction of a 1 GW electrolyser, backed up by a solar farm of equivalent capacity. Between now and 2030, thanks to these measures and investments totalling 8 billion euros, Portugal hopes that hydrogen will account for 5% of the energy consumed by the road haulage sector.

The "National Investment Plan"

The National Investment Plan (PNI) 2030⁸ is one of the instruments designed to achieve the targets set out in the PNEC.

On the transport front, the PNI provides for 21,660€ million in investment between now and 2030 (including 17,694€ million from the private sector) in order to finance 45 programmes and projects. Out of this total figure, 10,510€ million is aimed at strengthening and modernising rail infrastructure for passenger and freight transport (increasing capacity and reducing journey times on the Porto-Lisbon route, improving cross-border connections and interoperability as part of the Atlantic corridor (TEN-T), increasing the amount of electrified track, improving rail access to ports, as well as modernising rolling stock and multimodal terminals, etc.). A further 1,980€ million is earmarked for upgrading the road network and improving access to airports and certain business parks.

On the energy front, the PNI provides for 13,060€ million of investment between now and 2030 (including 12,336€ million from the private sector) to finance 12 programmes and projects, focusing mainly on boosting renewable energy production and distribution infrastructure (electricity, solar, green hydrogen, natural gas).

Policies to promote alternatives to diesel

Portugal has 4,528 charging stations for electric cars⁹ and 16 public CNG-LNG stations (operated in the main by Dourogas). In December 2021, Dourogas opened Portugal's first biogas plant.¹⁰

As far as vehicles are concerned, the government has already launched a number of programmes to promote purchases of alternative energy vehicles. The MOVEA Plan, for example, which ended in 2016, offered grants towards the purchase of electric and gas-powered vehicles. In 2021, the government also offered grants (to the tune of 4€ million)¹¹ for the purchase of (light) electric vehicles for private individuals and businesses (1 vehicle per individual and a maximum of 2 vehicles per business).

There are also tax reductions (total or partial, depending on CO₂ emissions levels) for electric or partially electric vehicles (hybrids, for example). It should be noted that these schemes do not currently extend to vehicles running on natural gas, for example.

In addition, no specific assistance is available for the purchase of for-hire vehicles. This lack of incentives, combined with very high vehicle prices and the current economic climate, means that the proportion of alternative-energy vehicles in Portuguese road haulage fleets is low. This phenomenon

⁷ <https://www.portugalenergia.pt/setor-energetico/bloco-4/>

⁸ <https://www.portugal.gov.pt/pt/gc22/comunicacao/documento?i=apresentacao-do-programa-nacional-de-investimentos-para-2030>

⁹ <https://www.electromaps.com/fr/stations-de-recharge/portugal>

¹⁰ <https://www.glpautogas.info/fr/stations-gnc-gnv-portugal.html>

¹¹ <https://chargeamps.com/pt/subsidios/>

is exacerbated by the fact that the vast majority of Portuguese companies are small, which limits their capacity to invest in new vehicles.

The Portuguese transport fleet is, however, already extremely old and in urgent need of modernisation. Moreover, some Portuguese companies are finding it difficult to meet environmental standards in certain EU countries, particularly those in the North, which are particularly stringent in this regard¹².

In Portugal, low-emission zones are known as “*Zona de Emissões Reduzidas (ZER)*”. Only Lisbon currently has one of these zones. Only Euro 3 vehicles are allowed in the historic centre, with Euro 2 vehicles permitted to drive in a more extended area.¹³ The government has not yet announced any commitments or plans to introduce further such zones elsewhere in the country.

Transport infrastructure and use

Modal split of freight transport (in tonnes kilometres)			
2023	Road	Rail	Inland waterways
European Union	78.1%	16.9%	5.0%
Portugal	85.9%	14.1%	0.0%

Source: Eurostat

The road network

The Portuguese road network extends over 14,325 kilometres¹⁴, of which 3,065 kilometres are motorways. Part of this network is equipped with electronic tolls operated by several companies such as *Via Verde*.¹⁵

The rail network

The Portuguese rail network is basically organised as follows:

- a main north-south axis,
- three connections with Spain,
- suburban networks in Lisbon and Porto.

It comprises a total of 3,621 kilometres of railway lines, 70% of which are in operation. Portugal does not currently have any high-speed lines. 120 million passengers and 9.7 million tonnes of freight were transported by rail in 2021. International transport accounted for 26,000 passengers and 2.3 million tonnes of freight, respectively. All the goods moved by rail were transported to or from Spain.¹⁶

The rail network also connects Portuguese ports to the rest of Europe and to Spain, via two main routes:

- One to the south via Entroncamento, Badajoz and on to Madrid
- The other further north, via Coimbra, linking up with the Spanish network via Salamanca

¹² ANTRAM interview

¹³ Portugal's low-emission zones explained - Green-Zones.eu

¹⁴ Transport and Communications Sector Statistics, 2021 - 2022 edition, INE

¹⁵ <https://www.viaverde.pt/particulares>

¹⁶ INE, 2021

The maritime and inland waterway network

Thanks to its prime geographical location on the Atlantic coast and its position as the gateway to continental Europe, Portugal naturally has huge potential when it comes to developing maritime and inland waterway traffic. These account for a third of the country's imports, totalling 84,000 million tonnes (2018 figures). Half of all trade is with Europe, followed by America (26% and 24% of cargo entering and leaving, respectively), Africa (19% and 17%) and Asia (5% and 8%)¹⁷.

The port of Sines is the main hub connecting the Atlantic to Europe. It handles almost half of Portugal's maritime freight. It is Europe's 15th-largest port in terms of container volume (2018 figures), and its 6th-largest in terms of transshipment. Next come the ports of Leixões in Porto (23% of maritime freight), followed by Lisbon (13%).

The Tagus, Sado, Douro and Aveiro lagoon are the country's inland waterways.

Mapping of rail services operated by “Comboios de Portugal”



Source: <https://www.cp.pt/passageiros/pt/como-viajar>

¹⁷ Maritime transport in Portugal. Lisbon Economic Department, French Embassy in Portugal. 10/2020.

ROAD FREIGHT TRANSPORT OPERATORS

Regulatory authorities

Ministry of Planning and Infrastructure

At state level, the Ministry of Planning and Infrastructure ("Governo do Planeamento e das Infraestruturas") is the ministry responsible for defining and implementing transport and communications infrastructure policies, among other tasks.¹⁸ The Ministry delegates the implementation and management of its policies to two main public bodies:

- The IMT (Instituto da Mobilidade e dos Transportes Terrestres), which is responsible for managing the State's concession contracts, taxation, training, issuing driving licences, managing the electronic vehicle identification system, etc.¹⁹.
- The AMT (Autoridade da Mobilidade e dos Transportes), which recently took over from the IMT in terms of regulating and defending competition in the ground, inland waterway and maritime transport sectors.²⁰

Alongside the Ministry of Planning and Infrastructure, other ministries, such as the Ministry of the Economy and Digital Transition and the Ministry of the Environment and Energy Transition, are also involved in developing and overseeing the transport sector.

National Road Safety Authority (ASNR)

The ASNR (Autoridade Nacional de Segurança Rodoviária) is part of the Ministry of the Interior. It is responsible for issuing fines and dealing with safety issues.

National Institute of Statistics (INE)

When it comes to statistics, the National Institute of Statistics (INE)²¹ is the main Portuguese body responsible for gathering a wide range of data and publishing associated reports, including an annual "Transport and Communications Statistics" report, whose findings have been used in the remainder of this study. The Strategy and Studies Department of the Ministry of the Economy also provides statistics and sectoral studies covering all areas of the Portuguese economy, including transport.

Other key public stakeholders in the Portuguese transport sector include:

- "Infraestruturas de Portugal" (IP), a wholly state-owned entity responsible for the management and maintenance of Portugal's road and rail infrastructure.
- "Comboios de Portugal" (CP), also 100% state-owned, is responsible for operating all the country's urban, regional and inter-regional rail lines.²²

¹⁸ <https://www.portugal.gov.pt/pt/gc21/area-de-governo/planeamento-e-infraestruturas/acerca>

¹⁹ <https://www.imt-ip.pt/sites/IMTT/Portugues/IMTT/MissaoeAtribuicoes/Paginas/MissaoeAtribuicoes.aspx>

²⁰ <https://www.amt-autoridade.pt/>

²¹ https://www.ine.pt/xportal/xmain?xpgid=ine_main&xpid=INE

²² Despite opening up its domestic passenger rail services to competition in 2018, Portugal has chosen to maintain the state-owned CP as the chief operator for the next 10 years. Only the line between Lisbon and Setúbal is operated by the privately-owned firm "Fertagus".

Trade associations

National Association of Public Road Hauliers (ANTRAM)

ANTRAM is the main employers' organisation in the sector. It brings together more than 3,000 companies, all of which enjoy shareholder status.

ANTRAM's main aim is to defend the interests of its members and represent them in the various trade bodies. Its school is also heavily involved in organising training courses and issuing certificates of proficiency.

ANTRAM also provides its members with assistance in legal and administrative matters.

National Association of Portuguese Hauliers (ANTP)

ANTP is Portugal's second-largest hauliers' association. It was set up during the strike in July 2008 as a result of disagreements within ANTRAM over the outcome of negotiations with the government. Less prominent than ANTRAM in the various joint bodies, it is mainly made up of small and medium-sized companies. On the other hand, it has developed a very active sales network.

Trade unions

Federation of Transport and Communications Workers' Unions (FECTRANS)

FECTRANS is the country's main transport union. Along with ANTRAM, it is responsible for negotiating the sectoral collective agreement (CCTV).

PORTUGUESE RFT SECTOR - KEY DATA

Structure of the Portuguese RFT sector in 2023

Structure of the Portuguese RFT sector in 2023

2023	Goods transported	Tonne-kilometres achieved		Average distance	Vehicle-kilometres achieved
	Thousand tonnes	million t.km	%	km	million vehicle.km
TOTAL	128,580	26,782	100.0%	208	1,794
Domestic transport	109,948	7,645	28.5%	70	683
International transport	18,632	19,137	71.5%	1,027	1,110
<i>International transport of goods loaded in Denmark</i>	6,312	6,415	24.0%	1,016	395
<i>International transport of goods unloaded in Denmark</i>	6,329	6,151	23.0%	972	360
<i>Cross-trade</i>	3,835	5,613	21.0%	1,464	296
<i>Cabotage</i>	2,156	958	3.6%	444	60

Source : Eurostat

The Portuguese road haulage industry remains predominantly international in focus. Its international activities account for more than two thirds of the sector's total business. The average distances travelled reflect the international, long-distance focus of the Portuguese RFT sector.

Evolution of the Portuguese RFT sector

Evolution of the Portuguese RFT sector in million tonne-kilometre

Million tonne-kilometre	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	AAGR*
TOTAL	32,935	36,555	34,863	31,835	34,877	34,186	32,963	31,014	24,241	32,050	32,039	26,782	-1.86%
Domestic transport	11,180	9,773	10,469	10,791	10,382	10,854	10,530	10,413	8,722	9,389	9,055	7,645	-3.40%
International transport	21,754	26,783	24,394	21,044	24,295	23,331	22,433	20,600	15,519	22,661	22,984	19,137	-1.16%

Source : Eurostat

*Average annual growth rate

Portuguese international transport activity experienced significant fluctuations between 2012 and 2019, followed by a drop in 2020 due to the Covid crisis, before reverting to pre-crisis levels from 2021 onwards (with the exception of 2023). In contrast, Portuguese domestic transport activity remained stable between 2014 and 2019. Domestic activity is struggling to return to pre-Covid levels. In 2023, there was a fall-off in both domestic and international business. It will be interesting to see whether this decline continued in 2024. It is also worth noting that the Portuguese RFT sector would appear to be struggling to recover from the sharp fall in business following the economic crisis of 2008.

Cabotage

Cabotage under Portuguese flag in the 2 main "cabotaged" countries

Million tonne-kilometre	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	TCAM*
Cabotage under Portuguese flag	904	1,190	1,458	1,199	1,308	1,341	1,112	1,094	981	1,267	1,306	3.75%
<i>in Spain</i>	441	626	766	658	655	735	533	673	564	754	834	6.58%
<i>in France</i>	423	452	575	421	513	491	509	368	328	457	380	-1.07%
Share of cabotage in Portuguese transport %	2.74	3.26	4.18	3.77	3.75	3.92	3.37	3.53	4.05	3.95	4.08	-

Source: Eurostat

AAGR: Average annual growth rate

Cabotage represents almost 5.7% of the Portuguese sector's international activity, i.e. around 4% of total activity. Almost all of this business is conducted in Spain and France. Cabotage in Spain has risen sharply in 10 years, from 441 million tonne-kilometres in 2012 to 834 million tonne-kilometres in 2022.

Cabotage in Portugal

Million tonne-kilometre	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	TCAM
Cabotage in Portugal	76	45	39	48	72	53	115	119	103	128	113	4.05%
Penetration rate of cabotage*	0.68%	0.46%	0.37%	0.44%	0.69%	0.49%	1.08%	1.13%	1.17%	1.34%	1.23%	-
Market share of cabotage**	1.00%	0.59%	0.50%	0.61%	0.96%	0.70%	1.52%	1.65%	1.61%	1.89%	1.52%	-

Source : Eurostat

AAGR: Average annual growth rate

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

**cabotage under foreign flag / (domestic transport for hire or reward of the country + cabotage under foreign flag)

Cabotage in Portugal increased in the 10-year period between 2012 and 2022, rising from 76 million tonne-kilometres to 113 million tonne-kilometres, notwithstanding a drop-off in activity in 2020 due to the Covid crisis. However, business volumes remain extremely low, with a penetration rate of 1.23%.

Evolution of the number of companies, employees and turnover in the Portuguese RFT sector

Year	Number of RFT companies	Turnover, in million euros	Number of employees
2012	8,508	4,720	58,268
2013	8,176	4,782	56,991
2014	7,885	4,993	58,880
2015	7,725	5,154	61,546
2016	7,656	5,294	65,355
2017	7,654	5,651	68,167
2018	7,696	6,005	71,741
2019	7,853	6,300	73,992
2020	7,753	5,988	73,152

Source: Eurostat

The number of RFT companies in Portugal declined between 2012 and 2019 at an annual rate of -1.14%. Road haulage revenues remained stable over the period, with an average annual growth rate of 4.21%. The number of employees in the sector rose over the same period: at an annual rate of +3.47%.

Number of RFT and move-in companies by size class (employees) in Portugal

Size classes	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
From 0 to 1 employee	3,439	3,316	3,329	3,12	2,945	2,816	2,819	2,798	2,9	2,961
From 2 to 9 employees	4,576	4,185	3,841	3,75	3,792	3,7	3,652	3,676	3,746	3,603
From 10 to 19 employees	680	618	618	603	644	692	689	710	714	737
From 20 to 49 employees	393	353	350	364	383	403	457	466	466	442
From 50 to 249 employees	139	122	131	139	144	157	158	163	171	175
250 employees and more	20	20	18	19	21	21	25	28	30	28
Total	9,247	8,614	8,287	7,995	7,839	7,789	7,800	7,841	8,027	7,946

Source: Eurostat

Approximately 83% of RFT and removals companies are very small businesses, employing fewer than 10 employees. The Portuguese road haulage sector is highly fragmented.

Key figures on RFT employment in Portugal, 2022

Number of companies	8,254
Turnover - million €	7,900
Employee's cost - million €	2,020
<i>Wages and salaries - million € (a)</i>	1,642
<i>Social security costs - million € (b)</i>	378
Apparent employen contribution rate (b/a)	23.00%
Number of persons occupied	78,569
<i>Unpaid presons employed</i>	1,508
<i>Employees</i>	77,061
<i>Share of employed in total workforce</i>	98.2%
Average number of persons employed per company	10.0
Average cost of employee in €	20,900
Added value per employee in €	34,190
Turnover per person employed	100,540
Investment per person employed in €	7,950
Investment rate (Investment/Added value)	23.34%

Source : Eurostat

Vehicle numbers

Vehicle fleet in Portugal

	2017	2018	2019	2020	2021
Rigids	50,760	51,908	60,797	55,213	55,780
Road tractors	45,144	50,125	55,587	49,916	50,602

Source : Eurostat

There are 7 million light vehicles and 134,000 heavy vehicles on the roads in Portugal.²³ While the number of diesel-powered light vehicles is declining (-1% between 2021 and 2020 in the case of passenger vehicles, -3.5% in the case of goods vehicles), the proportion of electric and hybrid vehicles is increasing: 100% electric vehicles (+60%), plug-in hybrids (+54%), non-plug-in hybrids (+32%).

²³ Transport and Communications Sector Statistics, 2021 - 2022 edition, INE

In terms of goods vehicles, 99% of light vehicles, HGVs and road tractors run on diesel. Around 1,600 light commercial vehicles on the road are electric. There are some 19 non-rechargeable hybrid HGVs and 3 100% electric HGVs. 13 tractors run on LPG.

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

ROAD FREIGHT TRANSPORT TAXES

Corporation tax

Corporation tax (IRC) is levied on a company's net profits. The rate for most companies is 21%. However, small and medium-sized businesses benefit from a reduced rate of 17% for the first 15,000€ of taxable income.

VAT

In Portugal, the standard rate of VAT is 23%. This applies to most goods and services. There is also an intermediate rate of 13%. It covers catering services, canned food, petrol and oil paint, tickets to cultural events, exhibitions and sporting competitions. A reduced rate of 6% applies to foodstuffs, water, literary publications, electrical power, passenger transport, hotels, medicine and medical equipment.

With regard to haulage activities, Law no. 55-1/2010 (Chapter 11 - Section 1 - Article 102) sets the VAT rate for "transfers of goods and provision of services" at 23%.

Single Road Tax (IUC)

Imposto Unico de Circulação, the Portuguese axle tax, applies to all vehicles at a rate that varies according to their engine size and, in the case of commercial vehicles, their weight. Vehicles are divided into different categories. Category C applies to Euro VI articulated vehicles with 5 axles (2+3 axles) and air suspension. The tax amounts to 800€ per year for this category of vehicle.²⁴

The special arrangement in Portugal which allowed hauliers who applied for “veículo longo” status to pay only half the amount of the tax was changed in 2021.²⁵ Currently, only vehicles used for the transport of travelling shows or related to the performing arts are eligible for this reduced rate, in addition to vehicles that operate exclusively within a given autonomous region.

Tolls

The Portuguese motorway network accounts for 3,065 kilometres of Portugal's total 424,000-kilometre road network. Part of this network is equipped with electronic tolls administered by several companies (e.g. Via Verde). The CNR estimates that the average price of tolls in Portugal is around

²⁴ https://info.portaldasfinancas.gov.pt/pt/informacao_fiscal/codigos_tributarios/iuc/Pages/iuc11.aspx

²⁵ <https://impostosobreveiculos.info/legislacao-leis/codigo-impost> Article 5, paragraph 8 of the Single Road Tax Code

0.19€/km²⁶ for 5-axle articulated vehicles weighing 40 tonnes or more. All the motorway sections subject to tolls are listed on the IMT website.²⁷

Excise duty on commercial diesel

On 1 January 2017, Portugal introduced differential tax rates on diesel depending on whether it is used as fuel for commercial or private vehicles. Until the end of 2024, commercial diesel was capped at 50,000 litres per vehicle per year. On 1 January 2025, this cap was reduced to 40,000 litres per vehicle annually.²⁸

- As of 30 March 2025, excise duty stood at 50.40€/hl.
- The RFT refund currently amounts to 17.40€/hl.

The net rate of excise duty on commercial diesel in the RFT sector is thus 33€/hl.

Indexation of diesel prices

Under Portuguese law, any increase in the price of diesel fuel (in excess of 5%) must be reflected in the cost of transport (based on the price on the day before the contract was signed, or the cost was renegotiated, and the day on which the goods were transported).²⁹

There is no benchmark index for the price of diesel fuel in Portugal. Some organisations, including ANTRAM, do publish the prices charged by service stations, albeit with varying frequency. Some of the haulage companies we spoke use these prices for indexing purposes, in cases where they are able to include them when negotiating with their customers; others come up with an index based on their own surveys of prices. Several of the companies surveyed also use the prices published by *energy.ec.europa*.

EMPLOYMENT REGULATIONS APPLICABLE TO ROAD FREIGHT TRANSPORT

Labour relations

The most current RFT collective agreement (CCTV), at the time this study was carried out, was published on 8 December 2019 and came into force on 1 January 2020.³⁰ Signatories include ANTRAM (the Portuguese hauliers' federation), FECTRANS (the transport and haulage union) and the various trade unions. All the companies surveyed have adopted the agreement. It was updated in 2021 and 2022 to reflect changes in the national minimum wage. In 2021, an increase of 4.724% was applied to the various compensation items (basic salary, seniority, bonuses and nighttime allowances), with a further increase of 6% applied to the same items in 2022.³¹

While the previous collective agreement (signed on 8 August 2018) introduced many changes, the new agreement is basically in the same vein, with the main changes being as follows:

- An increase in the agreed legal minimum wage (from 630€ to 777.05€) and in the various bonuses and allowances.

²⁶ Calculations based on a sample of 6 stretches of motorway (A1, A2, A3, A4, A6, A8), totalling 900 km.

²⁷ <https://www.imt-ip.pt/sites/IMTT/Portugues/InfraestruturasRodoviaras/RedeRodoviaria/Paginas/TaxasdePortagem.aspx>

²⁸ <https://antram.pt/informacao/53/Procedimentos-em-vigor>.

²⁹ Decree no. 239/2003 of 4/10/2003 and Decree no. 145/2008 of 28/07/2008

³⁰ [CCTV Antram-Fectrans 2020.pdf](#)

³¹ <https://www.antram.pt/conteudo/3313-salario-minimo-nacional-e-atualizacao-do-cctv-para-2022>

- A compulsory flat-rate night work allowance in the case of domestic transport.
- Singling out of and granting of special benefits (extra compensation, payment of "ADR" training, etc.) to drivers engaged in the transport of hazardous materials.
- The transfer of certain costs from the driver to the company (training and driver card in particular).

Most importantly, the new agreement maintains and enhances the status of "Iberian driver" and the practice of paying two hours' overtime per day, which were major changes introduced in the previous agreement.

Basic compensation

In 2022, the legal minimum monthly wage for Portuguese lorry drivers stood at 777.05€ (up 23.3% compared with 2019), not including the many compulsory bonuses detailed below. Most companies pay a basic salary equivalent to the legal minimum wage. Payment of a 13th and 14th month's salary is compulsory. These can be divided into twelve-monthly instalments or paid in two instalments (usually in June and December).

Seniority - Clause 46

Seniority bonuses (*diuturnidades*) are provided for in the collective agreement. They are payable after the employee has been with the company for three years and are increased every three years thereafter. After three years with a company, a driver with a Portuguese contract is entitled to 18.87€ a month (up 17.9% compared with 2019). After the fifteenth year, they are capped. For example, a driver with 8 years' seniority (the average for the group of companies surveyed) is entitled to a seniority bonus of 37.74€ (2 X 18.87€).

Bonus pay - Clause 59

Portuguese lorry drivers are entitled to bonus pay, the amounts of which depend on the type of vehicle and the geographical range of the trips undertaken. In the case of drivers working on international assignments and driving a 40-tonne articulated vehicle, bonus pay salary amounts to 38.85€ per month (+23.3% compared with 2019).

Salary top-up - Clause 59 updated in 2022

Group	Type of vehicle	Basic salary	Amount of salary top-up					
			Domestic		Iberian		International	
I	Under 7.5 tonnes	777.05 €	0	0.00 €	1.01	7.77 €	1.02	15.54 €
II	From 7.5 tonnes to 44 tonnes	777.05 €	1.02	15.54 €	1.03	23.31 €	1.05	38.85 €
III	More than 44 tonnes	777.05 €	1.04	31.08 €	1.06	46.62 €	1.10	77.00 €

Source: Antram collective agreement

Night work - Clauses 48 and 63

The law provides for a 25% increase for hours worked at night between 10 p.m. and 7 a.m.

The employer may also grant a night work allowance of 10% of the basic salary, i.e. 77.71€ per month. The collective agreement requires that this fixed night work allowance be paid as a matter of course to drivers assigned to Iberian or international duties, even if no transport operations occur during these hours. This payment is also compulsory in the case of drivers involved in domestic operations.

Overtime - Clause 47

The collective agreement also stipulates that all lorry drivers driving a vehicle weighing more than 7.5 tonnes be paid two hours' overtime per day, regardless of the type of assignments: domestic, Iberian or international. The amount paid for overtime is calculated on the basis of statutory basic pay (€700), bonus pay and seniority.

The rate for overtime is calculated as follows:

- +50% for the first hour,
- +75% for the second hour.

The total figure for these two extra hours is then multiplied by 30 days.

Prémio TIR - Clause 64

The TIR bonus is paid to employees who travel abroad in the course of their duties. It is payable irrespective of the number of days spent travelling. In 2022, it amounted to 135€ per month in the case of an international driver (up 4% compared with 2019). Considered as travel-related pay, it is not subject to social security contributions and is paid over 13 months. Iberian drivers are also entitled to a "TIR" bonus, which is worth 115€ per month where applicable (+4.5% compared with 2019).

Weekend and public holiday work - Clause 50

Work performed on weekly rest days, particularly at weekends or on public holidays, is paid at double the daily rate, regardless of the number of hours worked.

The following formula is used to calculate the daily rate payable: Monthly pay / 30 days = Daily pay.

As is the case when calculating overtime payments, this monthly pay figure includes basic salary, bonuses and seniority.

Paid leave

An employee's paid leave entitlement in the year in which the leave is taken is determined by the amount of work carried out by the employee during the previous year (year during which leave is earned).

Annual leave is limited to 4 weeks for both white-collar and blue-collar workers. Employees who work 6 days a week are entitled to 24 days' annual leave, while employees who work 5 days a week are entitled to 20 days' leave.

There are 10 public holidays a year.

Travel allowances - Clause 58

The minimum statutory daily allowance for drivers operating internationally was 36.40€ in 2022 (up 4% from 2019), regardless of the destination involved. For domestic duties, the daily allowance was 23€ (+7% from 2019) and 26€ for the Iberian zone (+4% compared with 2019).

According to surveys of companies and drivers, daily allowances are beginning to become the norm, and travel allowances calculated on a per-kilometre basis seem to be gradually disappearing, a trend that is in line with the provisions of the Mobility Package. Among the companies surveyed that continue to pay per-kilometre allowances, these vary between 7 and 9 centimes per kilometre. It should be noted that one company uses both calculation methods, with the one that is most advantageous for the driver being adopted.

Only one company surveyed occasionally compensates its drivers for a night's hotel accommodation for the compulsory weekly rest period (24 hours), which they nevertheless spend in their cab. It should also be noted that the Mobility Package seems to have had little effect in terms of the reorganisation of routes used by Portuguese companies for their international activities. Most of them are already organised to comply with the mandatory 45-hour rest period in Portugal. On average, drivers return home every other weekend.

Social security contributions

Social contributions applicable to driving staff in Portugal as of January 2022	Employer	Employee
Sickness-maternity, disability, oldness, survivors, professional diseases and unemployment (SGD)	23.75	11.00
Workplace accident	4.7	
Total	28.45	11.00

Source: Cleiss

Coverage for work-related accidents is the responsibility of employers, who are required take out insurance with an approved private insurance company. The cost of insurance premiums depends on the nature of the activity and the level of exposure to risk in the company. In haulage companies, this cost item amounts to 4.7%.

Personal income tax

2023 income tax in Portugal

Annual taxable incomes (in €)		Applicable rate	Deductable amount
From	To	%	€
-	7,479	14.5	-
7,479	11,284	21.0	486.14
11,284	15,992	26.5	1,106.73
15,992	20,700	28.5	1,426.65
20,700	26,355	35.0	2,772.14
26,355	38,632	37.0	3,299.12
38,632	50,483	43.5	5,810.25
50,483	78,834	45.0	6,567.33
78,834		48.0	8,932.68

Source: PWC

Portugal uses a withholding tax system for the payment of income tax.

Supervision of loading and unloading of goods

In 2021, Portugal introduced a law³² aimed at regulating the loading and unloading of goods and waiting times on Portuguese soil, regardless of the nationality of the company or driver involved. On all of the country's logistics platforms, with the exception of urban distribution and fuel transportation, for example, drivers are now prohibited from loading or unloading goods, in line with European regulations.

In view of the long waiting times often experienced, particularly in the mass distribution sector (sometimes up to 5 hours), the law also sets a limit on waiting times at warehouses, with the shipper or client being liable for a penalty after 2 hours, depending on the type of transport (domestic, Iberian, international) and the tonnage of the vehicle concerned.

Penalties applied to platforms beyond 2 hours of waiting

Categories	Penalty after 2 hours of waiting		
	National (€/h)	Iberic (€/h)	International (€/h)
Vehicle between 2.5t and 3.5t	12	13	14
Vehicle between 3.5t et 7.5t	15	16	17
Vehicle between 7.5t et 11t	18	19.5	21
Vehicle between 11t et 19t	24	25.5	27.5
Vehicle between 19t et 26t	26	28	30
Vehicle between 26t et 44t	30	32.5	35
44t vehicles and more	34	37	40

Source: Decree t n°57/2021 of 13/07/203021

³² Decree no. 57/2021 of 13/07/203021 https://www.froet.es/wp-content/uploads/Portugal-Decreto-Ley-572021-Carga_Descarga-y-Paralizacion_Traduccion.pdf

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

This part of the survey describes the economic and social conditions prevailing at the end of 2022, at the time of this most recent study. In carrying out this study, the CNR has drawn on research focused primarily on the fiscal and social 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 Portuguese 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 Portuguese hauliers and lorry drivers (see below and page 33).

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 12 Portuguese haulage companies involved in long-distance transport operations, mainly internationally. The companies selected for the purposes of this study can be described as follows:

	Number of tractors	Principal markets	Number of drivers	Turnover
Company 1	4	France, Belgium, the Netherlands, the United Kingdom	5	n.d
Company 2	2	The Netherlands, Belgium, the United Kingdom, France	2	n.d
Company 3	17	The United Kingdom, the Netherlands, Germany, Norway	17	€ 3,000,000
Company 4	9	Spain, France, Belgium, the Netherlands, Germany, Luxembourg	9	€ 890,000
Company 5	3	The Netherlands, Scandinavia, France	3	n.d
Company 6	58	France, Germany, Benelux, Italy	68	€ 7,000,000
Company 7	40	Spain, France	45	€ 5,000,000
Company 8	50	The United Kingdom, France, Germany, Benelux	50	€ 6,000,000
Company 9	8	Spain, France	8	€ 900,000
Company 10	10	Europe	9	€ 1,200,000
Company 11	24	Benelux, Germany, Switzerland, Denmark	24	€ 2,400,000
Company 12	10	Germany, the Netherlands, France	10	€ 1,500,000

The companies visited for this study are extremely diverse in terms of their size and structure. They all specialise in international road transport.

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

TRANSPORT EQUIPMENT - Use

Vehicle usage depends on companies' customers and the main markets in which they operate. The number of days a vehicle is used varies between 200 and 253 days, with a clustering around 238 days per year. The average annual mileage travelled by the vehicles operated by the hauliers we met ranges between 110,000 km and 150,000 km, with a clustering around 134,700 km per year. Road tractors are kept for between 5 and 10 years, with the vast majority of companies surveyed keeping them for around 8 years. Vehicles are often leased for 60 months and kept for a further 3 years after the end of the contract.

The semi-trailer/tractor ratio reported in company surveys is 1.09, a figure which represents an increase compared with the previous CNR study. A semi-trailer/tractor ratio of 1.06 was recorded in 2019.

TRANSPORT EQUIPMENT - Financing

The average purchase price of a new Euro VI tractor is between 90,000€ and 120,000€, with a clustering around 105,200€. The purchase price of a semi-trailer is estimated at 34,300€. The majority of companies appear to lease for periods ranging from 36 to 60 months, with a clustering around 60 months.

However, the use of bank loans and self-financing remains fairly widespread. One company also opted for 48-month financial leasing contracts, including maintenance and repairs.

In the case of international activities, tractor are kept for 5 to 10 years and semi-trailers for 10 to 15 years.

Data on interest rates (estimated at 1.13%) and leasing contract terms, it is possible to estimate the annual cost of owning a 40-tonne semi-trailer truck. This amounts to approximately 14,486€ annually, with a semi-trailer/tractor ratio of 1.09. The cost of owning a semi-trailer truck has remained relatively stable since the last CNR study in 2019. At that time, a figure of 14,431€ per year per semi-trailer truck was arrived at.

FUEL

Diesel remains the biggest cost item for Portuguese hauliers, even ahead of driver costs, as was previously noted in the CNR's 2019 survey of the Portuguese haulage sector. Average fuel consumption is 31.5 litres per 100 km. This is down on the 2019 average of 32.6 litres per 100 km.

None of the hauliers we met possessed a fuel tank. However, it should be pointed out that many Portuguese haulage firms do have one. Most of them buy their fuel in Spain, where prices are very competitive. In addition, companies are entitled to partial recovery of excise duty on their purchases of commercial diesel. According to information collected by the CNR, companies purchase most of their fuel in Spain (90%) and France (10%). In 2022, the average price of diesel in Spain, according to figures published by the European Commission, was 1.43€/litre (after partial excise duty refund), compared with 1.38€/litre in France (after partial excise duty refund). This difference in diesel prices between France and Spain is explained by the fuel reductions in duty applied in France between March and December 2022.

According to the fuel basket calculated by the CNR, based on information provided by companies, the price of a litre of fuel stood at 1.42€. This high price is explained by the spike in energy prices at the start of the war in Ukraine.

MAINTENANCE & REPAIRS

All the companies we visited have an in-house garage. The annual cost of maintenance and repairs for a 40-tonne semi-trailer truck are estimated to be around 7,200€/year. This represents an increase compared with the CNR's 2019 survey, when the annual figure was 6,000€ per semi-trailer truck. As in 2019, several of the hauliers we met said that they carry out the servicing of their vehicles themselves, in their own garages. This may partly explain the relatively low maintenance costs compared with neighbouring countries. For example, the maintenance and repair costs for a French 40-tonne semi-trailer truck amount to more than 11,000€ per year.

TYRES

The annual cost of tyres ranges broadly from 1,500€ to 6,750€. This cost item varies greatly depending on the type of vehicle purchased (with or without a tyre contract), as well as on the mileage travelled and loads carried. Almost all the hauliers surveyed who have an in-house garage change and maintain the tyres on their fleets themselves.

According to information obtained from Portuguese hauliers, the annual cost of tyres for a 40-tonne semi-trailer truck is estimated at 3,370€, up from 3,060€ in 2019.

TOLLS

This cost item is highly dependent on the location of hauliers' principal customers. For example, a company operating almost exclusively in France and Spain might spend almost 9,000€ a year on tolls per semi-trailer truck, while a company that often operates in the Netherlands, Belgium or Germany may spend as much as 22,000€ on tolls per vehicle per year.

According to CNR calculations, the average cost of tolls is in the region of 14,070€ per year per vehicle, assuming a mix of medium- and long-distance international journeys.

This cost item has changed little since the 2019 CNR study, when the figure was 14,200€ per year for a 40-tonne HGV. Portuguese hauliers seem to be particularly attentive to this cost item and choose to avoid, whenever possible, certain sections of road that are subject to tolls.

INSURANCE

The figures reported by hauliers vary widely, ranging from 2,300€ to 5,400€ per year per semi-trailer truck. Most of the companies we visited had opted for comprehensive insurance.

The figure arrived at by the CNR is 3,530€ per year for a 40-tonne semi-trailer truck with comprehensive insurance, a slight increase compared with 2019 (3,250€ per year per vehicle). Insurance costs in Portugal appear high compared with those in neighbouring countries. The hauliers we met with reported that they had little room for negotiation because the insurance market does not appear to be very competitive.

AXLE TAX AND OTHER VEHICLE TAXES

This tax stands at 800€ for a 40-tonne, 5-axle semi-trailer truck with air suspension. It remains unchanged.

OVERHEAD COSTS

Information on overhead costs is often difficult to collect. The way they are calculated varies from company to company. Some companies include the cost of their in-house garage, while others include the cost of ancillary activities such as logistics. The hauliers we spoke to put this cost at between 8% and 10% of the total cost of the vehicle. A figure of 8% of the cost price of the vehicle has been used for the purpose of our calculations.

2.2. EMPLOYMENT CONDITIONS AND DRIVER EMPLOYMENT COSTS

Employment conditions and driver pay in Portugal 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 located in Urbasa and Arroyo, in Spain.

During this second phase, approximately twenty drivers, employees with Portuguese contracts, agreed to be interviewed about their working conditions and pay.

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

WORKING CONDITIONS

Permanent contracts are the most widespread form of employment contract in the sector. Portuguese hauliers often hire drivers on fixed-term contracts (six to nine months, renewed once) before switching to permanent contracts. The average number of days worked per year is 232, ranging between 200 and 253 days. The statutory amount of paid leave is 22 working days. Many of the drivers interviewed reported that they have 30 days paid holiday a year, including public holidays, which are often taken in winter and summer. Drivers therefore work an average of 10.75 months a year. Average driver seniority, as reported in interviews with Portuguese companies, is high, at 8 years. In 2019, the figure was 7 years.

As regards their working schedule, Portuguese drivers assigned to international operations generally spend a between 16 and 20 nights away from home each month, and in most cases return home every two weeks. For the purposes of the typical scenario used in this survey, we have settled on an average of 20 nights away from home per month. It is worth noting, however, that a growing proportion of drivers report returning home every weekend.

Lastly, average annual driver mileage, as reported by companies, is approximately 132,830 km. Drivers report driving an average of around 130,260 km annually. The average used in this updated survey is 131,530 km per year. The reported driver/tractor ratio is 1.02.

NOTE ON THE BREAKDOWN OF DRIVER COSTS

International driver pay

The legal minimum monthly wage for a Portuguese lorry driver is 777.05€ gross per month. This amount is stipulated in the collective agreement and is broadly adhered to by companies.

To this minimum wage is added a seniority bonus, which amounts to 37.74€/month in the case of a road driver with 8 years' seniority, and various other bonuses set out in clauses 47, 48, 59 and 63 of the collective agreement. Lorry drivers are paid in 14 instalments. The 13th and 14th instalments have been averaged out for the purposes of calculating the monthly cost of a “typical” driver (see below). They factor in the legal minimum wage of 777.05€, bonus pay (38.85€), seniority (37.74€) and clauses 47 and 48 (in the case of the 13th month only).

A variable amount, covering travel allowances, has been added to this basic salary. As stipulated in the collective agreement, this amounts to 36.40€ per day, regardless of destination. In addition to these travel allowances, Portuguese drivers receive the TIR bonus, which is payable for each month worked. This amounts to 135€/month in the case of drivers operating internationally. To this must also be

added weekend allowances (clause 50). In the case of a “typical” Portuguese driver assigned internationally, a standard figure of 2 weekends per month has been adopted.

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

Standard profile of a Portuguese driver - Portugal - 2022					
Characteristics			<div>- Driver working 100% internationally.</div> <div>- Return to the base every two weeks on average.</div> <div>- Basic salary calculated according to the statutory minimum wage under the collective agreement.</div> <div>- Average seniority of 8 years.</div> <div>- Method of calculating the majority of travel allowances: daily flat rate of € 36.4 per day.</div> <div>- Service time of nearly 200 hours per month over 10.75 months.</div>		
Annual mileage achieved			135,500 km		
Number of actual working days per year			233		
Number of working weeks per year			45.5		
Number of driving hours per year			1,980		
Breakdown of the cost of a standard Portuguese driver in 2022					
Official presentation on pay slips					
EMPLOYER			EMPLOYEE		
Gross salary	Unit	1,513.59 €	Gross salary	Unit	1,513.59 €
Conventional minimum gross salary	30 days	777.05 €	Conventional minimum gross salary	30 days	777.05 €
Seniority	7 years	37.74 €	Seniority	7 years	37.74 €
Additional salary - Clause 59		38.85 €	Additional salary - Clause 59		38.85 €
Clause 48 and 63 - Night work (10% df the minimum salary)		77.71 €	Clause 48 and 63 - Night work (10% df the minimum salary)		77.71 €
Clause 47 (2 extra hours per day)	60 hours	400.14 €	Clause 47 (2 extra hours per day)	60 hours	400.14 €
Monthly payment of 13th and 14th months		182.09 €	Monthly payment of 13th and 14th months		182.09 €
Social contributions	28.45%	430.62 €	Social contributions	11.00%	166.49 €
SGD	23.75%	359.48 €	SGD	11.00%	166.49 €
Work accident insurance	4.70%	71.14 €			
Gross salary subject to employer's contributions excluding Premio TIR and excluding weekend allowances (A)		1,944.20 €	Net salary before income tax during 10.75 months of actual work excluding Premio TIR and excluding weekend allowances		1,347.09 €
			Income tax		220.84 €
Premio TIR (working months only) - Clause 60	13 months	146.25 €	Premio TIR (working months only) - Clause 60	13 months	146.25 €
Weekend allowances (working months only) - Clause 50	2 weekends	227.64 €	Weekend allowances (working months only) - Clause 50	2 weekends	227.64 €
Gross salary subject to employer's contributions, all bonuses and allowances included (for one month of full activity) (B)		2,318.09 €	Net salary after income tax (for a month of full activity)		1,500.14 €
Travel allowances for one month of actual work, 36.40 €/day		728.00 €	Travel allowances for one month of actual work, 36.40 €/day		728.00 €
Monthly cost of a driver for a month of full activity		3,046.09	Net salary of a driver during a month of full activity		2,228.14 €
Breakdown of the annual cost of a standard Portuguese driver in 2022					
B * 10.75 months	10.75 months	24,919.48 €	Fixed salary after income tax * 10.75 months	10.75 months	16,126.51 €
A * 1.25 month (paid leaves, public holidays, inactivity)	1.25 months	2,430.26 €	A * 1.25 month (paid leaves, public holidays, inactivity)	1.25 months	1,407.82 €
Travel allowances * 10.75 months		7,826.00 €	Travel allowances * 10.75 months		7,826.00 €
Total annual cost		35,175.74 €	Annual net salary		25,360.33 €
Cost of one hour of driving €		17.77 €	Average monthly net income		2,113.36 €
Cost per kilometre €		0.27 €			

Source: CNR European studies

The annual cost of a driver as calculated by the CNR has risen by more than 17.3% since 2019, up from 29,979€ to 35,176€ in 2022, despite the reduction in mileage driven over the same period. This rise is mainly due to increases in the sectoral minimum wage and per diem allowances. On average, over this 3 year period, the total annual cost of an international driver has risen by 5.47%/year. The number of days worked per year by a "typical" driver on a Portuguese contract remains more or less the same as in 2019. Annual mileage, meanwhile, is falling. As a result, the cost of an hour of driving has risen to 17.77€, an increase of 17.4% compared with 2019. By way of comparison, CNR's 2019 survey recorded a figure of 15.14€ per hour.

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

Operating conditions and costs of a 40-tonne HGV operated on long distance international routes, 2022 conditions		
	unit	Portugal Simulation
Yearly mileage of a vehicle	km	134,700
Number of operating days	days/year	238
Semitrailer/tractor ratio		1.09
Driver cost	€/year	35,176
Driver/tractor ratio		1.02
Yearly cost of vehicle financing and possession	€/year	14,486
Average consumption per 100 km	litres	31.5
Unit fuel price, 2022 average*	€/litre	1.4200
Fuel cost	€/year	60,251
Tyres	€/year	3,370
Maintenance-repair	€/year	7,200
Tolls and vignettes	€/year	14,070
Insurance (vehicle)	€/year	3,530
Axle tax and other vehicle tax	€/year	800
Synthesis - cost price (excluding overhead cost)		139,727
Cost/mileage ratio per annum	€/km	1.0373
Overhead cost	€/year	12,150
Synthesis - full cost price		151,877
Full cost per kilometre	€/km	1.13

Source: CNR

* After partial recovery of excise duties in Spain and France

According to CNR calculations, the per-kilometre cost of operating a Portuguese 40-tonne HGV internationally (excluding overhead costs), was 1.04€, compared with 0.83€ in 2019 (i.e. an increase of 25.7% since the previous survey). The cost item that has increased the most over the period is fuel, which has risen by 37.2%. This increase was mainly due to the surge in energy prices following the outbreak of war in Ukraine. Driver costs have also risen (+17.3%). There has been little movement in other cost items.

Ultimately, when overhead costs (estimated at around 8% of total costs) are added in, the CNR estimates the total per-kilometre cost in 2022 at 1.13€. This figure is in line with information provided by hauliers, who estimated their cost price at between 1€/km and 1.32€/km, with a clustering around 1.07€/km.

3. BIBLIOGRAPHY

Eurostat <https://ec.europa.eu/eurostat>

Cleiss <https://www.cleiss.fr/docs/cotisations/portugal.html>

INE Statistics of the Transport and Communications sector, 2021 – 2022 edition, INE

National energy-climate plan <https://www.portugalenergia.pt/setor-energetico/bloco-4/>

National investment plan

<https://www.portugal.gov.pt/pt/gc22/comunicacao/documento?i=apresentacao-do-programa-nacional-de-investimentos-para-2030>

Collective agreement

http://www.fectrans.pt/images/informacao/Acordos/Mercadorias/CCTV_Antram-Fectrans_2020.pdf

<https://www.antram.pt/conteudo/3313-salario-minimo-nacional-e-atualizacao-do-cctv-para-2022>

Loading-unloading and waiting time decree

Decree n°57/2021 of 13/07/203021 https://www.froet.es/wp-content/uploads/Portugal-Decreto-Ley-572021-Carga_Descarga-y-Paralizacion_Traduccion.pdf

Diesel index

Decree n°239/2003 du 4/10/2003 and Decree n° 145/2008 of 28/07/2008