



Comité National Routier



EUROPEAN STUDIES

The Spanish road freight transport sector

2020 study



Comité national routier

in cooperation with
Conseil, Énergie et Transports

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This survey, which was conducted in 2020, is intended to provide updated statistics concerning the activity of the Spanish RFT sector as well as the typical operating conditions and costs for a Spanish 40-tonne heavy goods vehicle used for international long-distance transport. The typical driver profile selected is that of a Catalan driver working internationally. Company interviews were carried out in 3 autonomous communities: the Basque Country, Catalonia and Madrid.

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

SUMMARY

The Spanish road freight transport (RFT) sector stands out in Europe due to the large number of collective agreements in force in the country. There is a total of 55 collective agreements, equivalent to one collective agreement per province. Of these 55 collective agreements, 30 are currently in force. Wages differ very significantly from one province to another, depending on the applicable collective agreement. In 2020, the gross annual salary of a driver ranged from 27,498 € in the province of Vizcaya (Basque Country) to 13,034 € in the province of Orense (Galicia), i.e. varying by a factor of two. Due to these large disparities, CNR has decided to focus its analysis on two autonomous communities: the Basque Country and Catalonia. Two reasons explain this choice: the geographical proximity of these provinces to France and their competition with the French RFT sector.

This latest study highlights several developments. Driver cost in Catalonia has increased by 9.7% since 2015 – from 37,890 €/year to 41,565 €/year in 2020. This is mainly due to an increase in the legal minimum wage set out in collective agreements, both in terms of basic gross salary and travel allowances. Driver cost is not the only cost item to have risen since 2015. Tolls increased by 25% compared to 2015, mainly due to a general increase in tolls throughout Europe, particularly in Germany, and the Belgium's adoption of a mileage-based tax. Maintenance and repairs were also affected (up 18.2% compared to 2015), as was the cost of ownership (up 8.2%). In contrast, insurance costs fell by 13% compared to 2015.

According to CNR calculations, the cost per kilometre of a Spanish 40-tonne heavy goods vehicle used for international long-distance transport, excluding overhead costs, is 0.89 € (compared with 0.84 € in 2015), an increase of more than 6% compared with the last study.

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1. OVERVIEW OF THE ECONOMIC AND SOCIAL ENVIRONMENT OF THE SPANISH SECTOR

1.1. ECONOMIC FRAMEWORK

SPAIN IN BRIEF

Capital	Madrid
Area	505,983 km ²
Population	47,332,614 inhabitants (Eurostat, 2020)
Official EU language(s)	Spanish
Political system	Parliamentary monarchy
Sovereign	King Felipe VI
Prime Minister	Pedro Sanchez
Minister of Transport, Mobility and Urban Programmes	José Luis Abalos
Date of EU membership	1 January 1986
Date of adoption of the euro	1 January 1999
Seats in the European Parliament	59 seats
Currency	Euro
European Commissioner	Josep Borrel, High Representative of the Union for Foreign Affairs and Security Policy
GDP growth (%)	2% (Eurostat, 2019)
Inflation (%)	-0.3% (Eurostat, 2020)
Unemployment rate (% of active population)	15.5% (Eurostat, 2020)
Trade balance	37,461 million € (Eurostat, 2019)
Gross monthly minimum wage	1,108.33 € (Eurostat, S1 2021)

NOTE ON THE CONDITIONS UNDER WHICH THE STUDY WAS CARRIED OUT

This study on the Spanish RFT sector was carried out under the economic conditions prevailing before the 2020 Covid crisis. 15 of the 17 companies visited were surveyed between January 2020 and early March 2020. The company interviews were conducted in 3 different autonomous communities: Catalonia, the Basque Country and Madrid. The operating conditions and costs presented are those relating to a 40-tonne Spanish HGV operating internationally and operated by a Catalan haulier. Due to the very large wage gaps observed between the autonomous communities, the typical driver profile selected is that of a Catalan driver working internationally under the terms of the Tarragona (Catalonia) collective agreement. Data and operating conditions are in keeping with other previously-published RFT studies carried out by CNR. They reflect the situation prior to the Covid crisis.

1.2. OVERVIEW OF SPANISH ROAD FREIGHT TRANSPORT

TRANSPORT AND INFRASTRUCTURE POLICY

Transport policy

Spanish land transport is largely dominated by road transport which, with 249,559 million tonne-kilometres in 2019, accounted for 95.2% of the overall total. Rail accounted for only 4.8% of goods transported and fluvial transport is virtually non-existent. The most active mode of transport after RFT is maritime transport.

A strategic plan for transport and housing entitled *Plan De Infraestructuras, Transporte Y Vivienda 2012-2024* (Pitvi 2012-2024)¹ aims to launch the process of transforming the transport sector in Spain. Its objectives are to:

- Improve the efficiency and competitiveness of transport organisations.
- Contribute to economic development.
- Promote mobility that takes into account the economic, social and environmental effects it generates.
- Strengthen territorial cohesion and improve access to all regions.
- Promote functional integration and intermodal transport.

It should be noted that this law attaches great importance to the environment and lists ways to reduce the environmental impact of each mode of transport. The modal shift from road to rail is one of its major aims, in addition to the development of intermodal solutions. In the maritime sector, particular emphasis is placed on pollution prevention (Marpol).

Transport infrastructure and use

2019	Road	Rail	Inland waterways
European Union	77.4%	22.6%	5.6%
Spain	95.2%	4.8%	0.0%

Source : Eurostat

The road network

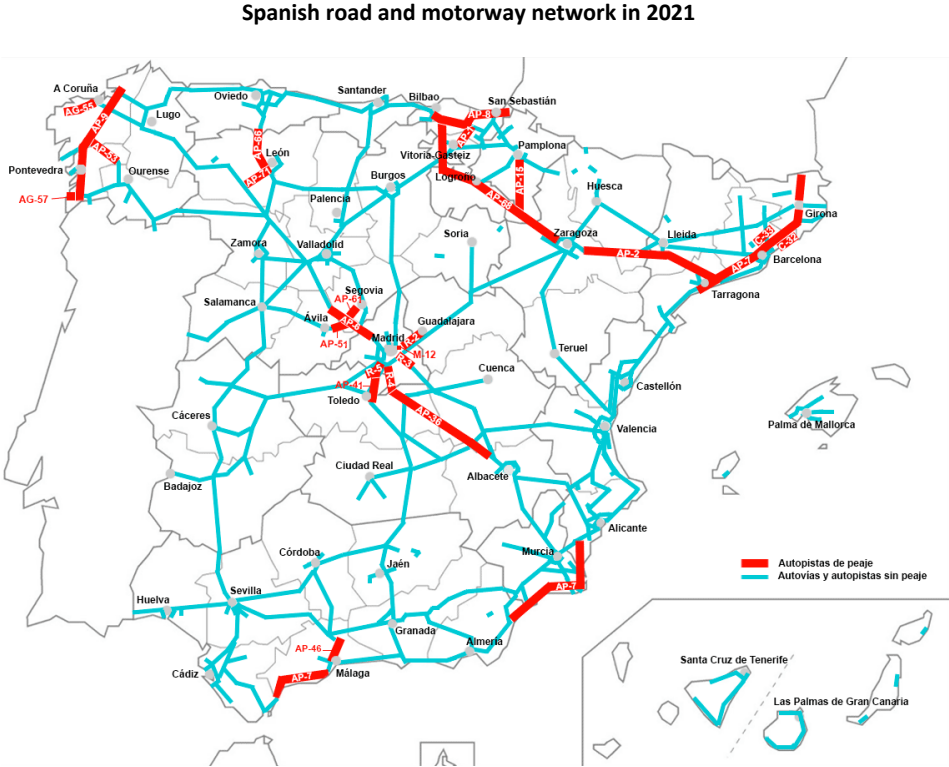
The Spanish road network is more than 165,600 km long. The first motorways in Spain were built in 1960 by private companies, as part of concessions granted by the State and based on a toll system. Subsequently, other toll concessions were granted by the State and the regions. The companies that hold these concessions are grouped together as part of the SEOPAN association.

The concessionary motorway network is now 2,500 km long. It should be noted that some 600 kilometres of motorways were made toll-free between 2018 and 2020. The current government has expressed its intention to make further sections toll-free in the coming years. In order to do so, they plan not to renew expiring motorway concessions. In 2021, three sections of motorway are thus

¹ https://www.mitma.gob.es/recursos_mfom/pdf/E35B8D33-F3B6-4695-9012-C22229966FA0/130944/PITVI20122024.pdf

set to become toll-free: the AP-7 between La Jonquera (on the Franco-Spanish border) and Tarragona, as well as between Montmelo and El Papiol; the third section is the AP-2 between Zaragoza and the Mediterranean.²

In addition to tolled motorways, there is an extensive network of toll-free, State-funded urban motorways, called *autovías*.



Legend:

- █ Toll motorways
- █ Toll free motorways and expressways

Source : https://www.enterat.com/_images/servicios/mapacarreterasplano02.gif

The rail network

The so-called “general interest” rail network is 16,000 kilometres long, 14,000 kilometres of which are run by the ADIF. The rest is managed by the regions or autonomous communities. Two entities manage and maintain the Spanish rail networks: ADIF (*Administrador de Infraestructuras Ferroviarias* – Administrator of Railway Infrastructure) and the national railway transport company RENFE (*Red Nacional de Ferrocarriles Españoles*). Another company, ADIF-Alta Velocidad (ADIF-AV) manages the 3,402-kilometre- long high-speed network.³

² <https://www.sudouest.fr/2020/01/07/espagne-au-1er-janvier-deux-autoroutes-en-fin-de-concession-sont-redevenues-gratuites-7030387-4803.php>

³ http://www.adifaltavelocidad.es/es/ES/infraestructuras/lineas_de_alta_velocidad/lineas_de_alta_velocidad.html

Regarding freight transport, more than 14 million tonnes of goods were transported by rail in 2020⁴. In order to increase the attractiveness of the sector, emphasis is being placed on the development of terminals in logistics hubs such as ports, major centres of production and consumption, borders and other logistical areas.

Ports

Spain has 46 so-called “general interest” ports, more than half of which are located on the Mediterranean coast, with the others situated on the Cantabrian coast and the Canary Islands.

In 2019, 497 million tonnes of goods passed through the country’s ports.⁵ Ports accounted for almost 20% of the transport sector’s GDP, which is equivalent to 1.1% of Spain’s GDP.⁶ In addition, more than 60% of exports and nearly 85% of imports pass through ports.⁷ Port activities provide around 35,000 jobs directly (and 110,000 indirectly). This shows the importance of ports to the Spanish economy.

The port system is mainly owned by the public sector. Private operators also provide port and terminal management services.

The 2012-2024 PITVI (*Plan de infraestructuras, transportes y vivienda*) plan outlines future priorities such as cost control, innovation, automation of ports, their integration into the overall logistical system, as well as security.

With a volume of over 90 million tonnes of goods handled in 2017, the port of Bahia de Algeciras is Spain’s leading port. Next come the ports of Valencia (around 70 million tonnes) and Barcelona (over 55 million tonnes).

Total traffic, expressed in tonnes, of Spanish ports in 2017



Source: tibagroup

⁴ <https://apps.fomento.gob.es/BoletinOnline/?nivel=2&orden=07000000>
⁵ https://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=mar_go_aa&lang=fr
⁶ <https://www.lamoncloa.gob.es/espana/eh18-19/otras/Paginas/infraestructuras.aspx>
⁷ <https://www.lamoncloa.gob.es/espana/eh18-19/otras/Paginas/infraestructuras.aspx>

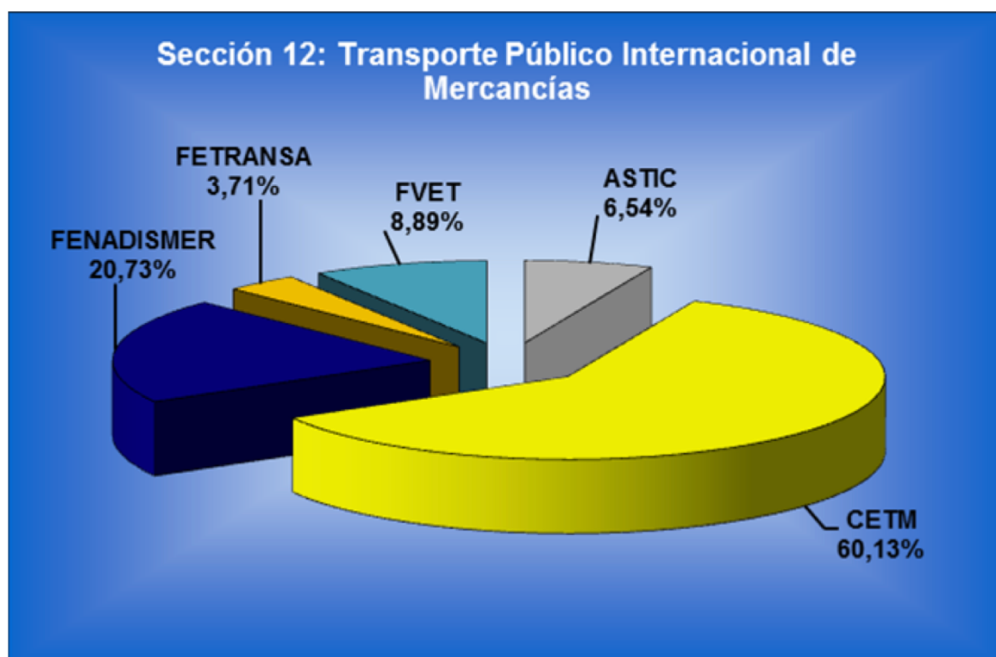
ROAD FREIGHT TRANSPORT OPERATORS

Regulatory authorities

The transport sector in Spain is highly organised. The Ministry of Transport and Mobility (*Ministerio de Transportes, Movilidad y Agenda Urbana*⁸), and more specifically the State Secretariat for Transport (*Secretaría de Estado de Transportes, Movilidad y Agenda Urbana*), plays a central role in organising and regulating these activities. The Land Transport Department runs several entities, including the National Transport Committee (CNT).

The CNT is divided into specialised sections in which the following professional organisations (OPs) participate.

Distribution of professional organisations (%) in the CNT section dedicated to international road freight transport



Source: Ministry of Transport

Several research observatories that work on transport-related issues produce regular studies and reports. Most of these documents are publicly available on the Ministry's website.⁹ The road freight transport observatory, with which several professional organisations collaborate, provides a transport cost simulation tool on the Ministry's website.¹⁰ However, the work of the observatory is not comparable to that of the CNR insofar as these figures are normative and are not based on statistical surveys.

Other administrations or bodies that interact with the road freight transport sector include:

- *Dirección General de Carreteras* (Department of Roads).

⁸ <https://www.mitma.gob.es/el-ministerio/organizacion-y-funciones/organizacion-del-mitma>

⁹ www.fomento.gob.es

¹⁰ <https://www.mitma.gob.es/transporte-terrestre/servicios-al-transportista/observatorios-del-transporte/observatorios-del-transporte-de-mercancias-por-carretera>

- *Agrupación de Tráfico de la Guardia Civil* (Ministry of the Interior), in charge of road inspections.
- *Agencia Estatal de Administración* (Department of Finance).
- *Ministerio de Trabajo y Inmigración* (Ministry of Labour and Immigration).
- *Instituto Nacional de Estadísticas* (National Institute of Statistics).

The governments of the various autonomous communities (*Generalitat*) also play an important role in organising the land transport sector.

Professional RFT organisations

Confederación Española de Transporte de Mercancías (CETM)

This is the most important professional organisation in the sector. It represents more than 31,000 transport and logistics companies.¹¹ It works with other specialist associations. It also participates in discussions with the ministry, the EU and employee representatives. CETM is heavily involved in training through the *Confederación Española de Formación del Transporte y de la Logística* (CEFTRAL).

Asociación del transporte Internacional por carretera (ASTIC)

This umbrella organisation for Spain's international road hauliers. It has 200 members in total.¹² Its role is to:

- inform its members about the state and evolution of legislation and standardisation in the sector,
- identify and offer specialised training courses,
- represent and defend the interests of its members vis-à-vis government bodies and the EU.

Federación Nacional de Asociaciones de Transporte de España (FENADISMER)

The national federation of transport associations in Spain mainly represents *autonomos* (self-employed hauliers) and small and medium-sized transport companies. It represents more than 32,000 transport companies, equivalent to more than 60,000 vehicles.¹³

Asociación of transportistas autonomos

It represents self-employed hauliers, mainly in the Madrid region and is not the only one of its type. There are several regional associations that represent such small independent hauliers, such as A.T.A or ATAP.

¹¹ <https://www.cetm.es/presentacion/>

¹² <http://www.astic.net/page/astic-quienes-somos>

¹³ <https://www.fenadismer.es>

THE SPANISH RFT SECTOR – KEY DATA

Structure of the Spanish RFT sector in 2019

Structure of the RFT sector under Spanish flag in 2019

2019	Goods transported	Tonne-kilometres achieved		Average distance	Vehicle-kilometres achieved
	Thousand tonnes	million t.km	%	km	million vehicle.km
TOTAL	1,542,109	249,559	100.0%	162	15,400
Domestic transport	1,455,443	165,910	66.5%	114	10,729
International transport	86,666	83,648	33.5%	965	4,671
<i>International transport of goods loaded in Spain</i>	42,945	44,399	17.8%	1,034	2,411
<i>International transport of goods unloaded in Spain</i>	32,952	32,172	12.9%	976	1,849
<i>Cross-trade</i>	4,571	4,144	1.7%	907	239
<i>Cabotage</i>	6,198	2,933	1.2%	473	172

Source : Eurostat

Spanish road freight transport remains focused on the domestic market, which accounts for more than two thirds of the sector's total activity. It should be noted that the average trip length (around 1,000 km) underlines the long-distance orientation of the international freight transport carried out by the Spanish sector.

Evolution of the Spanish RFT sector

RFT evolution under Spanish flag in million tonne-kilometre

Million tonne-kilometre	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	AAGR*
TOTAL	242,983	211,895	210,068	206,843	199,209	192,597	195,767	209,390	216,997	231,109	238,994	249,559	0.24%
Domestic transport	175,184	151,060	146,194	142,323	133,368	126,997	128,157	137,236	144,984	154,666	158,476	165,910	-0.49%
International transport	67,799	60,835	63,874	64,520	65,841	65,600	67,610	72,154	72,012	76,442	80,518	83,648	1.93%

Source : Eurostat

*Average annual growth rate

Over the 2008-2019 period, the RFT activity of the Spanish sector has remained relatively stable, with an average annual growth rate of 0.24%/year. It should be noted, however, that there has been an increase in international activity (+1.9%/year on average over the period), which has offset the fall in domestic activity (-0.5%/year on average over 11 years).

In addition, the global economic crisis of 2008 had a severe impact on domestic transport (-28% between 2008 and 2009, with the effects perceptible right down to 2013). At that point, domestic activity recovered rapidly with an average annual growth rate of 4.6% per year up to 2019.

Cabotage

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

Million tonne-kilometre	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	AAGR*
Cabotage under Spanish flag	1,084	1,534	1,685	1,832	1,949	2,353	2,177	2,473	2,372	2,781	2,719	2,933	9.47%
<i>in Germany</i>	154	61	137	90	85	87	100	46	86	79	95	67	7.29%
<i>in France</i>	860	1,353	1,415	1,670	1,775	2,172	1,884	2,302	2,131	2,494	2,376	2,617	10.65%
Share of cabotage in Spanish transport %	0.45	0.72	0.80	0.89	0.98	1.22	1.11	1.18	1.09	1.20	1.14	1.18	-

Source: Eurostat

AAGR: Average annual growth rate

Cabotage carried out by the Spanish sector accounts for more than 3.5% of Spanish international road transport, or nearly 1.2% of the sector's total activity. This cabotage activity is carried out mainly in France (89% of overall cabotage activity). The cabotage activity conducted in France has more than tripled in 11 years, from 860 million tonne-kilometres in 2008 to 2,617 million tonne-kilometres in 2019.

Cabotage in Spain

Million tonne-kilometre	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	AAGR
Cabotage in Spain	1,185	855	665	703	639	976	1,149	1,269	1,311	1,736	1,595	2,109	5.38%
Penetration rate of cabotage*	0.67%	0.56%	0.45%	0.49%	0.48%	0.76%	0.89%	0.92%	0.90%	1.11%	1.00%	1.26%	-
Market share of cabotage**	0.74%	0.61%	0.49%	0.53%	0.51%	0.81%	0.95%	0.98%	0.95%	1.18%	1.06%	1.33%	-

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 + cabotage under foreign flag)

Cabotage carried out in Spain increased over these 11 years (up 78% between 2008 and 2019), rising from 1,185 million tonne-kilometres in 2008 to 2,109 million tonne-kilometres in 2019, but the volumes of activity remain low, with a penetration rate of 1.26%.

RFT companies

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

Year	Number of RFT companies	Turnover, in million euros	Number of employees
2016	105,407	30,950	227,973
2017	103,420	32,600	243,132
2018	101,145	34,258	251,904

Source: Eurostat

The number of RFT companies in Spain fell slightly between 2016 and 2018, i.e. -2% per year over two years. Road freight transport turnover increased over the period, with an average annual growth rate of 5%. The number of employees in the sector also increased over the period, i.e. up 5%/year over 2 years.

Pre-2016 data are not available on the Eurostat website, so comparison is only possible for the period 2016-2018.

Number of RFT and removal companies depending on size classes (employees) in Spain

Size classes	2015	2016	2017	2018	2018 Structure
From 0 to 1 employee	60,241	68,916	66,726	65,430	65.05%
From 2 to 9 employees	36,151	32,400	31,869	30,727	30.08%
From 10 to 19 employees	2,835	2,943	3,572	3,662	3.58%
From 20 to 49 employees	1,469	1,737	1,790	1,851	1.81%
From 50 to 249 employees	386	374	406	434	0.42%
250 employees and more	31	34	34	46	0.05%
Total	101,113	106,405	104,396	102,151	100.00%

Source: Eurostat

More than 94% of RFT and removals companies are very small, with fewer than 10 employees. The Spanish road freight transport sector is thus extremely fragmented. It should be noted firms with only one employee account for more than half of all RFT and removal companies, i.e. 64% of the total. Self-employed and independent hauliers (*autonomos*) play an important role in the transport sector.

Key figures on RFT employment in Spain, 2018

Companies number	101,145
Turnover - million €	34,258
Employees' cost - million €	7,408
<i>Wages and salaries- million € (a)</i>	5,822
<i>Social security costs - million € (b)</i>	1,586
Apparent employer contribution rate (b/a)	27.2%
Number of persons employed	337,990
<i>Unpaid persons employed</i>	86,086
<i>Employees</i>	251,904
<i>Share of employed in total workforce</i>	74.5%
Average number of persons employed per company	3
Average cost of employee in €	29,400
Added value per employee in €	46,900
Turnover per person employed	101,400
Investment per person employed in €	6,900
Investment rate (Investment/Turnover)	19.7%

Source : Eurostat

Vehicle fleet

Vehicle fleet in Spain

	2015	2016	2017	2018	2019
Road tractor	195,657	207,889	218,154	225,942	232,680
Trailers and semitrailers	426,510	443,598	459,712	449,614	487,823

Source: Eurostat

The fleet of vehicles has steadily increased over the period 2015-2019. The number of tractors recorded in Spain has risen (4% per year on average over this period).

1.3. OVERVIEW OF FISCAL AND LABOUR REGULATIONS APPLICABLE TO ROAD FREIGHT TRANSPORT IN SPAIN

TAXES APPLICABLE TO ROAD FREIGHT TRANSPORT

Corporate tax

The general corporate tax rate (*impuesto sobre sociedades*) is 25%. Other tax rates may apply depending on the type of business being taxed.

Newly created companies are subject to a tax rate of 15% during the first two years, i.e. for the first tax period in which they make a profit and for the following tax period. However, this rate does not apply to newly created companies that are part of a national or international group.¹⁴

VAT

Impuesto sobre el Valor Añadido (IVA) is levied throughout Spain (with the exception of the Canaries, Ceuta and Melilla) and applies to deliveries of goods and services by companies and professionals, as well as intra-community purchases and imports from third countries. IVA follows with the same rules and procedures as French VAT, except as regards the lower rates.

VAT rate in force since 1 July 2012:

- Normal rate of 21%, which applies in particular to transport operations and fuel.
- Reduced rate of 10%, which applies in particular to food products.
- Special reduced rate of 4% which applies among other things to basic foodstuffs.¹⁵

¹⁴ <https://taxsummaries.pwc.com/spain/corporate/taxes-on-corporate-income>

¹⁵ <https://www.agenciatributaria.es/AEAT.internet/Inicio/ Segmentos /Empresas y profesionales/Empresas/I VA/IVA.shtml>

Road tax on motor vehicles

The specific taxation regime for vehicles used in the RFT sector comprises a number of taxes and levies. In the case of a 40-tonne, 5-axle Euro VI semitrailer truck with pneumatic suspension, the average amount is 600.86 €/year, which includes:

- axle tax (IVTM): 271.70 € per year per vehicle,
- local business tax (IAE): 315.60 € per year per vehicle,
- transport permit (Visados): 14.56 € per year per vehicle.¹⁶

Tolls

The Spanish motorway network accounts for about 2,500 kilometres – out of a total of 166,625 kilometres – of the road network in Spain. This network is run by several different operators (see page 10). Full details available on the VIAT website.¹⁷ According to CNR estimates, the average cost of Spanish tolls for heavy goods vehicles is approximately 0.22 €/km.

Excise duty on commercial diesel fuel

The measure for a partial refund of excise duty for heavy goods vehicles with a GVWR greater than or equal to 7.5 tonnes has existed since 2007. It is capped at 50,000 litres per vehicle per year. Unlike in France, there is no single fixed refund rate. Refunds are made strictly according to the regions where the fuel is purchased, and the rates charged in these regions. Most importantly, these payments are processed directly at petrol stations by means of professional cards issued to companies and authorised by the AEAT's Customs and Special Taxes Department.¹⁸ A card issued in another Member State may be used for the purchase of commercial diesel in Spain provided that its issuer complies with the requirements of HAP/290/2013 decree of 19 February 2013¹⁹ and that it has been authorised by the AEAT.

If they do not have business cards, hauliers may register on the website of the Electronic Office of the Department of Finance²⁰ which handles refunds for diesel purchased in Spain.

Reminder:

- As of 2 March 2020, excise duty in Spain stood at 37.90 €/hl.
- The rate of refund corresponds to the difference between the rate of excise duty applied to diesel in the region and the minimum rate applicable to diesel across the autonomous communities (33 €/hl). Since 1 January 2019, all autonomous regions have been applying the same refund rate (4.90 €/hl).
- The net rate of excise duties on commercial diesel is therefore 33 €/hl.

¹⁶ https://www.mitma.gob.es/recursos_mfom/listado/recursos/observatorio_de_costes_enero_2020.pdf (page 14)

¹⁷ <https://www.viat.es/donde-utilizarlo/en-autopistas-espanolas>

¹⁸ Agencia Estatal de Administración Tributaria: www.agenciatributaria.es

¹⁹ <https://www.boe.es/buscar/pdf/2013/BOE-A-2013-2084-consolidado.pdf>

²⁰ Sede electrónica de la Agencia Estatal de Administración Tributaria: <https://www.agenciatributaria.gob.es/>

LABOUR REGULATIONS APPLICABLE TO ROAD FREIGHT TRANSPORT

Social dialogue

Spanish road freight transport is governed by different collective agreements depending on the province concerned. In total, there are 55 collective agreements, i.e. one collective agreement per province. Of these 55 provincial collective agreements, 25 are now obsolete; in 12 of the provinces where this is the case, the agreements are still being applied pending their replacement, while in 4 others (Aragón, Guipúzcoa, the Balearic Islands, Las Palmas) they have been terminated. In these latter provinces, the General Agreement II on freight transport companies²¹ now applies. 30 collective agreements are currently in force²². This is a unique situation in the European Union, where, despite the fact that some countries, such as Germany, have several collective agreements, none of them has quite so many agreements with such large wage differences between them.

Because of these marked disparities across the country, the CNR has decided to focus on two autonomous communities: Catalonia and the Spanish Basque Country. There are two reasons for this choice: the geographical situation of these regions (i.e. on the border with France) and the fact that this proximity means that they are in direct competition with the French sector. Due to the health crisis, company interviews were supplemented by interviews with Madrid hauliers.

Also, for the sake of comparison with the previous 2015 CNR study, the collective agreement from the province of Tarragona (Catalonia) is used in this section to calculate the cost of a Spanish driver working internationally.

In addition to the collective agreement that applies in their province, some companies choose to implement their own company agreement with their teams, often in order to provide additional benefits over and above those set out in the general agreement.

Pay rates

Compensation for Spanish drivers varies greatly from one province to another, depending on collective agreements, individual companies and the type of transport being carried out. It generally consists of:

- a basic salary,
- a seniority bonus,
- bonuses in accordance with the collective agreement (*plus convenio*),
- additional annual bonuses known as *pagas extras* (3 months of salary, generally paid in March, June and December, or on a monthly basis),
- various additional premiums and bonuses,
- travel allowances (*dietas*).

²¹ https://www.boe.es/diario_boe/txt.php?id=BOE-A-2012-4367

²² <https://www.transporteprofesional.es/publicaciones/sep415tp/>

Remuneration of lorry drivers according to the collective agreements applicable in Spain

(Provincia = Province of collective agreement, Tabla = last year of application of the collective agreement in force, SB AÑO = conventional annual gross salary, ANT/AÑO = annual bonus for 10 years of seniority, PC AÑO = conventional bonus for long distance lorry drivers, EXTRAS = additional bonus (*pagas extras*))

PROVINCIA	Tabla	SB AÑO	ANT/AÑO	PC AÑO	EXTRAS	BRUTO ANUAL
VIZCAYA	2020	17.027,76	1.702,78	3.268,32	5.499,71	27.498,57
BARCELONA	2020	14.892,00	2.937,60	3.916,45	5.372,10	27.118,15
ASTURIAS	2020	16.578,00	3.315,60	1.493,28	4.973,40	26.360,28
LA RIOJA	2020	16.743,60	1.674,36	429,96	4.604,49	23.452,41
GUIPÚZCOA	2009	16.610,40	1.661,04	0,00	4.567,86	22.839,30
MADRID OL	2020	13.708,80	1.757,76	2.720,04	4.546,65	22.733,25
GUADAL. (OL)	2020	11.870,40	2.374,08	4.457,64	3.561,12	22.263,24
ÁLAVA	2019	11.925,48	1.192,56	4.367,64	4.371,42	21.857,10
BURGOS Frac	2020	15.514,20	1.551,42	466,08	4.266,41	21.798,11
I. BALEARES	2010	15.255,00	0,00	2.288,28	3.813,75	21.357,03
TARRAGONA	2020	10.492,80	2.098,56	4.448,76	4.260,03	21.300,15
MADRID	2020	12.765,60	1.636,80	2.532,96	4.233,84	21.169,20
ALBACETE	2020	11.646,00	1.164,60	5.007,60	3.202,65	21.020,85
NAVARRA	2008	15.420,96	0,00	1.189,92	4.152,72	20.763,60
BURGOS	2020	14.281,20	1.285,20	1.175,64	3.891,60	20.633,64
LA CORUÑA	2020	15.088,20	1.161,12	1.138,80	3.224,22	20.612,34
VALENCIA	2020	15.396,24	1.085,04	0,00	4.120,32	20.601,60
CEUTA	2018	9.064,44	1.812,89	5.702,16	3.525,20	20.104,69
GERONA	2011	12.219,48	2.443,90	1.168,44	3.957,95	19.789,77
ZARAGOZA	2019	12.790,80	0,00	3.038,40	3.957,30	19.786,50
ALICANTE	2018	14.681,52	1.035,12	0,00	3.929,16	19.645,80
SEVILLA (OT)	2020	13.998,60	1.399,86	0,00	3.849,62	19.248,08
SEGOVIA	2020	13.840,80	0,00	926,88	3.691,92	18.459,60
ZAMORA	2020	14.641,80	0,00	0,00	3.660,45	18.302,25
TOLEDO	2020	12.056,40	1.971,36	722,64	3.506,94	18.257,34
PONTEVEDRA	2019	13.211,76	1.321,18	382,08	3.302,94	18.217,96
MÁLAGA	2018	12.566,95	0,00	1.261,92	4.152,01	17.980,88
GRANADA	2020	12.798,00	2.559,60	0,00	2.559,60	17.917,20
SALAMANCA	2020	11.789,88	1.178,99	1.646,52	3.242,22	17.857,61
LUGO	2020	12.265,20	432,72	1.488,96	3.174,48	17.361,36
JAÉN	2020	11.534,40	2.306,88	0,00	3.460,32	17.301,60
GUADALAJARA	2020	10.599,84	1.589,98	2.041,80	3.047,45	17.279,07

Source : transporte profesional - November 20, 2020

Remuneration of lorry drivers according to the collective agreements applicable in Spain

(Provincia = Province of collective agreement, Tabla = last year of application of the collective agreement in force, SB ANO = conventional annual gross salary, ANT/ANO = annual bonus for 10 years of seniority, PC ANO = conventional bonus for long distance lorry drivers, EXTRAS = additional bonus (*pagas extras*))

PROVINCIA	Tabla	SB AÑO	ANT/AÑO	PC AÑO	EXTRAS	BRUTO ANUAL
LÉRIDA	2017	10.836,00	1.625,40	1.473,00	3.272,97	17.207,37
ALMERIA	2016	10.252,80	1.924,08	1.439,04	3.403,98	17.019,90
MURCIA	2018	11.466,24	0,00	2.076,12	3.385,59	16.927,95
CIUDAD REAL	2020	11.613,60	923,52	1.252,68	3.057,32	16.847,12
SEVILLA (OL)	2020	12.522,12	812,40	0,00	3.333,63	16.668,15
VALLADOLID	2019	11.831,16	851,04	791,28	3.170,55	16.662,63
BADAJOS	2019	9.988,92	1.997,78	1.247,04	3.308,44	16.542,18
TERUEL	2020	10.306,80	1.027,56	2.296,80	2.833,59	16.464,75
PALENCIA	2019	13.074,48	0,00	0,00	3.268,62	16.343,10
CANTABRIA	2020	12.940,20	0,00	0,00	3.235,05	16.175,25
LEÓN	2020	11.869,20	0,00	1.066,80	2.967,30	15.903,30
CÓRDOBA	2020	11.296,80	935,04	471,72	3.175,89	15.879,45
CASTELLÓN	2010	9.520,20	952,02	2.134,80	3.151,76	15.758,78
HUESCA	2020	11.689,20	0,00		3.831,46	15.520,66
CUENCA	2019	10.309,56	2.061,91	0,00	3.092,87	15.464,34
CÁDIZ	2010	10.090,80	2.018,16	0,00	3.027,24	15.136,20
SEVILLA	2020	9.154,80	915,48	1.659,60	2.932,47	14.662,35
SORIA	2020	10.846,80	1.084,68	0,00	2.711,70	14.643,18
ÁVILA	2018	10.594,56	1.059,46	0,00	2.913,50	14.567,52
HUELVA	2020	7.941,60	0,00	3.081,60	2.755,80	13.779,00
CÁCERES	2019	10.312,56	0,00	337,68	2.662,56	13.312,80
ORENSE	2014	9.480,00	0,00	1.184,28	2.370,00	13.034,28
LAS PALMAS	2013	8.399,40	839,94	880,80	2.309,84	12.429,98

Source : transport profesional - November, 20, 2020

It is important to point out the discrepancies between the collective agreements in force in the different Spanish provinces. Thus, there is a difference of 111% between the highest gross salary – i.e. 27,498.57 € gross per year in the province of Vizcaya (Basque Country) – and the lowest, i.e. 13,034.28 € gross per year in the province of Orense (Galicia). Far from offsetting the differences between basic salaries, additional sources of compensation actually amplify them. In the end, a driver's earnings under a collective agreement can vary by a factor of two depending on the province concerned.

The 2016-2020 Tarragona (Catalonia) collective agreement stipulates compensation of 1,291.92 € gross per month, comprising:

- A gross monthly basic salary of 844.71 €.
- Bonuses (*plus convenio*) of 369.54 € gross per month.
- In some cases, a transport bonus (*plus transport*) of 77.67 € gross per month.²³

Seniority

Seniority bonuses are generally stipulated in the various Spanish collective agreements. They vary from 0% to 60% of gross basic salary depending on the number of years at the company.

In terms of the Tarragona collective agreement, the seniority top-up is set at 5% of basic salary at the end of a driver's second year with the company, 10% at the end of the fourth year, 20% after nine years, 30% after fourteen years and 40% after nineteen years or more.

²³ Appendix to the Tarragona collective agreement 2016-2020 (page 25).

The average seniority reported by the companies interviewed was 4 years. Thus, the rate used to calculate the typical profile of a Spanish driver working internationally is 10% of gross basic salary.²⁴

Additional bonuses (pagas extras)

Three additional annual payments are made in March, June and December. Under the Tarragona collective agreement, these additional payments each consist of 30 days' basic pay plus seniority and other agreed-upon bonuses (*plus convenio* and *plus transporte*, if this bonus is paid by the company).²⁵ They are paid in March, June and December or on a monthly basis over 12 months.

Overtime

The working year set out by the Tarragona collective agreement consists of 1,776 hours of working time as of 1 January 2018, i.e. 40 hours of working time per week. Overtime is paid at a higher rate. Any additional hour is thus paid 9.13 € gross²⁶ in the case of a *conductor mecanico* (i.e. a holder of a category CE driver's licence authorised to drive semitrailer truck).²⁷

As a reminder, the number of hours in annual working year is set by the collective agreements and ranges between 1,684 hours and 1,826 hours (i.e. between 37 hours and 40 hours per week, excluding overtime).

Interviews with hauliers and drivers revealed that these overtime hours, as well as night work and work on public holidays, are generally offset by days off. In some cases, these hours are paid in the form of bonuses and premiums that feature under various names on pay slips (*gratificaciones extraordinarias, mejora voluntaria, plus actividad, etc.*). These hours can also be incorporated under the heading of travel allowances.

Work on weekends and public holidays

Under the Tarragona collective agreement, work done on weekends is paid at public holiday rates.

Drivers working on 24 December and 31 December who go on to work between midnight and 6 a.m. on the following day are also entitled to this increased rate. This rate amounts to 150% of the usual applicable rate (based on gross basic salary, seniority bonuses and bonuses agreed to under the collective agreement (*plus convenio*)).²⁸

Night work

The Tarragona collective agreement stipulates a 25% bonus for night work between 10 p.m. and 6 a.m. It is calculated using basic salary, seniority bonuses and bonuses agreed to under the collective agreement (*plus convenio*).²⁹

²⁴ Article 22 of the Tarragona collective agreement 2016-2020 (page 7).

²⁵ Article 30 of the Tarragona collective agreement 2016-2020 (page 8).

²⁶ Appendix to the Tarragona collective agreement 2016-2020 (page 25).

²⁷ https://www.boe.es/diario_boe/txt.php?id=BOE-A-2019-13988

²⁸ Articles 28 and 29 of the 2016-2020 Tarragona collective agreement (pages 7-8).

²⁹ Article 26 of the Tarragona collective agreement 2016-2020 (page 7).

Paid leave

People are entitled to 22 days' paid leave in Spain. In addition, there are a further 13 paid national holidays, plus between 1 and 4 local or religious holidays.

The Tarragona collective agreement specifies that drivers are entitled to 23 working days of paid leave.

Travel allowances - Dietas

Summary of travel allowances provided for in collective agreements

PROVINCIA	TABLA	NACIONAL	INTERNACIONAL
SEVILLA OL	2020	62,68	62,65
ASTURIAS	2020	59,47	91,76
CÁCERES	2019	54,86	69,03
MURCIA	2018	53,71	75,19
ÁLAVA	2020	51,47	64,31
VIZCAYA	2020	50,89	57,56
ALMERIA	2018	50,50	50,50
VALENCIA	2020	50,01	66,49
LUGO	2020	49,11	61,00
BARCELONA	2020	48,42	82,49
VALLADOLID	2019	48,00	58,62
LEÓN	2020	47,37	63,49
PONTEVEDRA	2019	46,92	86,05
MADRID OL	2020	46,88	87,51
CANTABRIA	2020	46,00	53,00
LA CORUÑA	2019	45,02	55,85
CÓRDOBA	2020	44,06	62,80 + gastos
ZAMORA	2020	44,00	Según gastos
HUELVA	2020	43,79	75,02
MADRID	2020	43,65	81,49
I. BALEARES	2010	43,29	46,75
GRANADA	2020	43,26	76,27
SEVILLA OT	2020	42,40	A convenir
SALAMANCA	2020	42,15	52,26
ALBACETE	2020	41,89	77,02
ÁVILA	2018	41,88	A convenir
LA RIOJA	2020	41,70	72,99
TARRAGONA	2019	41,64	71,21
SORIA	2019	41,31	46,63
ZARAGOZA	2019	41,20	57,71
MÁLAGA	2018	40,58	67,50
GUIPÚZCOA	2009	40,47	54,44
BURGOS	2020	40,10	75,91
TERUEL	2020	39,96	59,68
ALICANTE	2018	39,48	54,55
GERONA	2011	38,89	55,81
HUESCA	2020	38,77	66,16
LÉRIDA	2017	38,20	67,18
JAÉN	2020	38,10	76,20
SEGOVIA	2020	38,03	66,17
CEUTA	2018	37,88	

Segun gastos : according to expenses

Source : transporte profesional - 20 novembre 2020

Summary of travel allowances provided for in collective agreements

PROVINCIA	TABLA	NACIONAL	INTERNACIONAL
LAS PALMAS	2013	37,84	
GUADALAJARA	2020	37,48	52,90
OURENSE	2014	37,00	52,00
BADAJÓZ	2019	36,09	57,83
CIUDAD REAL	2020	36,00	65,00
TOLEDO	2020	35,26	38,47
CASTELLÓN	2010	34,79	46,97
PALENCIA	2019	34,35	42,00
SEVILLA	2020	34,28	A convenir
GUADAL OL	2020	34,21	48,26
NAVARRA	2008	33,99	49,43
CÁDIZ	2010	31,68	62,85
CUENCA	2019	31,01	53,53

Source : transporte profesional - November, 20, 2020

Domestic trips

For trips within the country, under the Tarragona collective agreement lorry drivers receive the following allowances:

- breakfast: 4.47 €,
- lunch: 13.54 €,
- dinner: 13.54 €,
- overnight allowance: 10.09 €,
- or daily compensation: 41.64 €. ³⁰

International trips

As regards international trips, under the Tarragona collective agreement drivers receive a daily travel allowance of 71.21 €. This compensation starts as soon as the heavy goods vehicle crosses the Spanish border and continues until it returns. ³¹

Interviews in the field with drivers with Spanish contracts revealed that mileage allowances continue to be paid by Spanish companies. The rates reported by the drivers interviewed range from 5 to 10 euro cents per kilometre. These per-kilometre allowances are paid instead of the travel allowances provided for in the collective agreements. Furthermore, CNR has observed that per-kilometre allowances have become standard practice in company agreements.

³⁰ Article 31 of the Tarragona collective agreement 2016-2020 (page 8).

³¹ *Ibid.*

Social security contributions

Social contributions applicable to driving staff as of January 1st, 2020	Employer	Employee
General contribution	23.60%	4.70%
Unemployment		
Permanent contract	5.50%	1.55%
Temporary contract	6.70%	1.60%
Work accidents and occupational diseases*	6.70%	0.00%
Wage guarantee fund	0.20%	0.00%
Vocational training	0.60%	0.10%
Total for permanent contract	36.60%	6.35%
Total for temporary contract	37.80%	6.40%

Source: Cleiss

* Contributions for accidents at work and occupational diseases are payable by the employer. They are set by the State, which determines the rate according to the risk specific to each sector of activity. RFT companies are subject to a rate of 6.70%. This rate was also observed on the payslips collected from the interviewed companies.

Personal income tax

2020 income tax rates in Spain

Taxable income bracket (€)		Tax rate (%)
0	12,450	19
12,450	20,200	24
20,200	35,200	30
35,200	60,000	37
> 60,000		45

Source: KPMG Spain

The following rates apply to a single person without children or dependants.

Spain operates a system of withholding tax for the payment of income tax.

2. STUDY OF THE OPERATING CONDITIONS AND COSTS FOR A 40-TONNE SPANISH HGV OPERATING INTERNATIONALLY

This part of the study describes the economic and social conditions prevailing in the first quarter of 2020, at the time this updated study was conducted. In carrying out this study, CNR has drawn on research focused primarily on the fiscal and labour aspects of the RFT sector, as well as on previous CNR studies of the country and feedback from the experts with whom CNR collaborates. These different sources provide an overview of the Spanish RFT sector internationally and highlight the main developments observed since the last study. This research and process of dialogue are further backed up by interviews with Spanish hauliers and lorry drivers (see below and page 30). The company interviews were conducted in three autonomous communities: Catalonia, the Basque Country and Madrid. The typical case presented below is that of a 40-tonne Spanish HGV operating internationally. It should be noted that due to the significant wage gaps observed between autonomous communities, the typical driver profile selected is that of a Catalan driver working internationally under the terms of the Tarragona (Catalonia) collective agreement.

All the figures eventually adopted by the CNR in order to construct the typical profile represent the best expert appraisal of this set of data sources.

2.1. OPERATING CONDITIONS AND COSTS FOR COMPANIES

This section is mainly based on face-to-face interviews with 17 Spanish (Basque, Catalan, Madrid-based) road freight transport companies involved in long-distance transport operations, mainly internationally. The companies included in this study have the following characteristics:

	Number of tractors	Number of drivers	Company headquarters	Principal markets	Turnover
Company 1	13	4	Catalonia	Benelux, Portugal, Spain, Germany, Switzerland, Italy	1,500,000 €
Company 2	32	40	Basque Country	Germany, France, Benelux	18,000,000 €
Company 3	22	20	Basque Country	Germany, Belgium, the United Kingdom	15,000,000 €
Company 4	31	220	Catalonia	France, Germany, Spain	51,236,000 €
Company 5	9	15	Basque Country	France	8,900,000 €
Company 6	115	95	Basque Country	France	43,000,000 €
Company 7	330	14	Catalonia	France, Germany Benelux	56,000,000 €
Company 8	13	10	Basque Country	Germany, Belgium, France, the United Kingdom, Spain, Portugal	4,300,000 €
Company 9	300	80	Catalonia	Europe	180,000,000 €
Company 10	40	40	Catalonia	France, Portugal, Spain	10,000,000 €
Company 11	4	4	Catalonia	France, Portugal, Spain, Italy, Belgium, Germany	n.d
Company 12	50	50	Basque Country	France, Benelux, Italy, United Kingdom	23,500,000 €
Company 13	2	2	Catalonia	France, Germany	1,500,000 €
Company 14	10	10	Catalonia	France, Germany, Italy, Allemagne Hungary, Czech Republic	22,000,000 €
Company 15	70	70	Catalonia	France, Benelux, Italy, United Kingdom, Czech Republic, Portugal	40,000,000 €
Company 16	56	56	Madrid	France, Germany, Belgium, United Kingdom, Netherlands	87,000,000 €
Company 17	135	135	Madrid	France, Germany, Italy, United Kingdom	23,000,000 €

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

To enable a comparison with the data from other CNR country studies, only companies whose main activity is international long-distance freight transport have been selected. Their long-distance international transport operations are often combined with other more specific activities, such as refrigerated transport, or with domestic transport.

The CNR is hereby reporting the results of these interviews, which have no statistical value. However, they do shed light on figures and information obtained elsewhere. Ultimately, the CNR uses figures based on expert opinion to establish the costs and operating conditions that pertain for a “typical” HGV operating internationally.

TRANSPORT EQUIPMENT – Operational data

Vehicle use depends on the characteristics of the customer and the main markets in which the companies operate. The number of days vehicles are operated varies between 231 and 264 days, with a clustering around 242 days per year, compared to a figure of 259 days in 2015. The average annual distance travelled by the vehicles of the hauliers we met with is between 120,000 and 155,000 km, with a clustering around 141,200 km per year. Vehicle mileage is also down compared to the last CNR study in 2015, when it was 145,000 km per year. Tractors used for international operations are kept between 5 and 7 years, with a clustering around 6 years for the vast majority of companies surveyed. Vehicles are often acquired via 48-month leases and kept for an additional 1 to 2 years after the end of the contract.

The tractor/semi-trailer ratio reported in the course company surveys was 1.35, up from the last CNR study in 2015 when the tractor-trailer ratio was 1.25.

TRANSPORT EQUIPMENT – Financing

The average purchase price of a Euro VI tractor established based on interviews with Spanish hauliers is between 80,000 € and 95,000 €, with a clustering around 83,500 €. The purchase price of a semi-trailer is estimated at 25,000 €. Companies seem to mainly use leasing over periods ranging from 36 to 60 months, with a clustering around 48 months.

Some companies opt for rentals over 36 months for the purchase of tractors, often with maintenance and repairs included. 2 of the 17 companies surveyed said they used bank loans to buy tractors.

The period for which a tractor is kept is between 5 and 7 years, and between 10 and 15 years for semi-trailers, with the average being almost 11 years.

Data on interest rates (estimated at 2%) and leasing contract conditions allow the annual cost of owning a 40-tonne semitrailer truck to be calculated. It is nearly 15,234 €, with a ratio of semi-trailer/tractor ownership of 1.35. The cost of owning a semitrailer truck has increased since the last study in 2015. The figure arrived at in that study was 14,083 € per year per semitrailer truck, which means that there has been an increase of 8.2% in 5 years.

FUEL

The average fuel consumption of the companies visited was around 29.9 litres per 100 km.

When it comes to fuel purchases, almost all of the hauliers we met with by most of their fuel in Spain, where they manage to obtain reasonable prices. A system of partial refund of excise duty on commercial diesel is also in operation. According to the findings of the CNR, companies mainly fill up in Spain (95%) and France (5%). According to European Commission publications, the average 2020 fuel price in Spain (after partial refund of excise duty) was 0.8379 €/litre (compared with 0.8933 €/litre in France after partial refund of the French TICPE excise tax). Only 5 out of the 17 companies we met

with have a fuel tank and use it to fill up most of the time, with additional fuel being purchased in France or Spain when necessary.

Based on the fuel shopping basket calculated by the CNR (using information provided by companies), the price of one litre of fuel was 0.8406 €.

MAINTENANCE & REPAIRS

Only 2 out of the 17 companies interviewed have an in-house garage and carry out a portion of the maintenance on their vehicles, which are mainly semi-trailers. Others often have a service contract as part of a leasing or rental deal. This is the case for 7 of the 17 companies visited. The maintenance-repair cost item is particularly difficult to calculate because of the variety of maintenance contracts included in leasing and rental contracts. Some hauliers interviewed who have opted for a maintenance contract as part of their leasing package claim to pay 6,480 € for a period of 48 months. By way of comparison, the cost per kilometre (according to the estimates of the Spanish Road Freight Transport Observatory) is 0.046112 €/km,³² i.e. 6,510 € per year taking into account the annual mileage for a typical international HGV as calculated by CNR. As a result, we have settled on 6,500 € as the estimated maintenance cost for a semitrailer truck in 2020. This cost item has increased by 18.2% in 5 years.

TYRES

The annual cost of tyres ranges widely, from 2,400 € to 4,400 €. This cost item varies greatly depending on the method of purchase of the vehicles (with or without a tyre contract) or on the brand chosen, but also depending on the mileage and the loads transported. All companies we met with have a special contract for their tyres.

Based on information provided by Spanish hauliers, the annual cost of tyres for a 40-tonne semitrailer truck is estimated at 3,180 €.

TOLLS

The annual toll costs for a 40-tonne semitrailer truck operating internationally range widely, between 10,000 € and 25,000 €. Costs vary greatly depending on the countries visited and the main markets in which the companies operate. This cost item has increased greatly since the 2015 Spanish study. This increase can be explained in particular by the growing number of countries using a mileage-based tax (e.g. Belgium) and by a widespread increase in tariffs, such as the Maut in Germany, which is an important market for the Spanish sector.

This figure does not include the Eurovignette, which is used in the Netherlands, Luxembourg, Sweden and Denmark.

The annual cost of tolls for a typical Spanish company is estimated at 19,000 €, not including the Eurovignette. This cost item has increased sharply (+25%) since 2015, the date of the last CNR study on the Spanish sector.

³² https://www.mitma.gob.es/recursos_mfom/listado/recursos/observatorio_de_costes_enero_2020.pdf
(page 14)

INSURANCE

The amounts reported by hauliers vary widely, ranging from 1,600 € (per year, per semitrailer truck) to 3,000 € (per year, per semitrailer truck). The companies visited in the main opted for comprehensive insurance. Some use third-party insurance for their semi-trailers.

The figure estimated by the CNR for a 40-tonne semitrailer truck with comprehensive insurance is 2,270 € per year. Insurance costs are lower compared with the last CNR study on the Spanish sector in 2015. In that earlier study, insurance was estimated at 2,600 €/year per semitrailer truck, which means that this cost item has decreased by 13%. The hauliers interviewed are particularly sensitive to this cost item.

AXLE TAX AND OTHER VEHICLE TAXES

These taxes amount to 600.86 €/year for a 40-tonne, 5-axle Euro VI semitrailer truck with pneumatic suspension.

OVERHEAD COSTS

Information on overhead costs is often difficult to collect. How they are calculated differs from one company to another. Some take into account the cost of the in-house garage, while others include in their calculations the cost of ancillary activities such as logistics. The professionals we met on-site estimated this cost at between 6 and 9% of the total cost of the vehicle.

2.1. EMPLOYMENT CONDITIONS AND DRIVER EMPLOYMENT COSTS

Employment conditions and driver pay in Spain were observed during two phases of interviews: a first phase in companies with employers in the Basque Country and Catalonia; and a second phase, involving face-to-face interviews with drivers in car parks and rest stops near La Jonquera, on the Franco-Spanish border. During this second phase, around twenty drivers, employees with Spanish contracts, volunteered to be interviewed about their working conditions and pay.

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

WORKING CONDITIONS

Permanent contracts are the most common form of employment contract in the sector. The number of working days per year is 235 days, ranging from 225 days to 245 days. The legal number of days of paid leave is 22 working days, plus between 13 and 17 public holidays depending on the region. These days off are often taken in the summer and during the Christmas and New Year period. In other words, drivers' actual working year averages 10.5 months. The average seniority, as reported during interviews with Catalan and Basque companies is 4 years. It is lower than the figure recorded in 2015, which was as high as 10 years.

In terms of their schedule, Spanish drivers working internationally generally spend 20 nights away from home per month, and the vast majority of them go home at once every two weeks.

Finally, the average mileage that emerges from company surveys is almost 134,800 km per year. Meanwhile, drivers reported that they were driving more: i.e. 136,700 km annually. The average used for this latest study is 135,800 km per year, slightly lower than in 2015 (136,000 km/year). The driver/tractor ratio was 1.04. This ratio is also slightly lower than in 2015, when it was 1.07.

Spanish hauliers, like their European counterparts, are facing a shortage of drivers. To remedy this, they are hiring foreign drivers. Some companies say they are recruiting drivers from North Africa to address the shortage of driving personnel in Europe. The use of independent hauliers, known as *autonomos*, particularly on international routes, is ongoing. Thus, a portion of haulage operations are outsourced. This is true when it comes to certain major Spanish RFT companies, which thus focus on the organisational and logistics side of such trips.

NOTE ON DRIVING PERSONNEL COST FORMATION

International driver pay

The monthly legal minimum wage for a Spanish lorry driver under the terms of the Tarragona collective agreement is 844.71 € gross per month.

The minimum wage supplemented by a seniority-based top-up – 84.47 €/month in the case of a lorry driver with 4 years' service, i.e. 10% of the minimum wage, plus bonuses linked to the collective agreement (*plus convenio*, *plus transporte* (if paid by the company) as well as the additional payments known as *pagas extras*). These *pagas extras* have been spread out over the twelve months of the year to allow the cost of a “typical” driver to be calculated (see below). The 3 *pagas extras* are based on the legal minimum wage (844.71 €), bonuses provided for by the collective agreement (i.e. *plus convenio*: 369.54 €) and a seniority-based top-up of 84.47 €. Companies sometimes pay what is referred to in the collective agreement as a *plus transporte* bonus of around 77.67 € per month. The payment of this bonus does not appear to be widespread among Spanish companies. Only 1 company we met with pays this bonus to its drivers. Other monthly bonuses are rare. Overtime and work carried out during public holidays frequently entitle drivers to days off.

In addition to the fixed salary, there is a variable component, which consists of travel allowances. During interviews at rest areas, several Spanish lorry drivers reported that they received a per-kilometre travel allowance. The rate ranged between 0.05 € and 0.10 € per kilometre. Half of the hauliers and drivers we interviewed reported that they paid/received daily allowances as provided for in the collective agreement, i.e. 71.21 €/day regardless of the destination.

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


Standard profile of an international driver- Spain - 2020 For a Spanish international driver in Catalonia (Tarragona collective agreement)					
Characteristics		<ul style="list-style-type: none"> - Driver working 100% of his time internationally. - Return to base every two weeks on average. - 20 nights away for home per month. - Basic salary calculated according to collective agreements. For the selected standard profile, the collective agreement is that of Tarragona. - Average seniority of 4 years. - Daily travel allowance of 71.21 € according to the Tarragona collective agreement. - Monthly working time close to 225 hours over 10.5 months. 			
Annual mileage achieved		135,800 km			
Number of actual working days per year		235			
Number of working weeks per year		45.5			
Number of driving hours per year		1,980			
Cost breakdown of a standard Spanish international driver in 2020 - Catalonia					
Presentation of a standard pay slip					
EMPLOYER			EMPLOYEEE		
Gross salary		1,623.40 €	Salaire Brut		1,623.40 €
Conventional minimum gross salary (Tarragona)		844.71 €	Conventional minimum gross salary (Tarragona)		844.71 €
Seniority (10% of conventional gross salary)		4 years 84.47 €	Seniority (10% of conventional gross salary)		4 years 84.47 €
Conventional bonus (<i>Plus convenio</i>)		369.54 €	Conventional bonus (<i>Plus convenio</i>)		369.54 €
Monthly pagas extras (3 pagas extras)		12 months 324.68 €	Monthly pagas extras (3 pagas extras)		12 months 324.68 €
Social contributions		36.60%	Social contributions		6.35%
General contribution		23.60%	General contribution		4.70%
Unemployment (permanent contract)		5.50%	Unemployment (permanent contract)		1.55%
Work accidents and occupational diseases		6.70%	Work accidents and occupational diseases		0.00%
Wage guarantee fund		0.20%	Wage guarantee fund		0.00%
Vocational training		0.60%	Vocational training		0.10%
Gross salary subject to employer's contributions		2,217.57 €	Net salary before income tax excluding travel allowances		1,520.32 €
			Monthly income tax (IRS)*		337.74 €
			Net salary after income tax		1,182.57 €
Travel allowances for an actual working month (10.5 months per year), 71.21 €/day		1 424,20 €	Travel allowances for an actual working month (10.5 months per year), 71.21 €/day		1 424,20 €
Monthly cost of a driver for a month of full activity		3,641.77 €	Net salary of a driver for a month of full activity		2,606.77 €
Breakdown of the annual cost of a standard Spanish international driver in 2020 - Catalonia					
Fixed gross salary subject to employer's contributions * 10.5 months		10.5 months 23,284.44 €	Fixed salary after income tax * 10.5 months		10.5 months 12,417.03 €
Fixed salary during 1.5 month (paid leaves, public holidays, inactivity)		1.5 month 3,326.35 €	Fixed salary during 1.5 month (paid leaves, public holidays, inactivity)		1.5 month 1,773.86 €
Travel allowances * 10.5 months		14,954.10 €	Travel allowances * 10.5 months		14,954.10 €
Total annual cost		41,564.89 €	Annual net salary		29,144.99 €
Cost of an hour of driving €		20.99 €	Average monthly net salary		2,428.75 €
Cost per kilometre €		0.31 €			

*Childless driver under permanent contract

Source: CNR European studies

Based CNR surveys, driver costs have increased by 9.7% since 2015 (from 37,892 € to 41,565 € in 2020). This rise is explained by the increase in salaries provided for in the Tarragona collective agreement 2016-2020, which concerned both gross salary and travel allowances. In the space of 5 years, the total annual cost of an international driver increased by 1.87%/year on average. The number of working days per year and the annual mileage driven by a "typical" driver with a Spanish contract have fallen slightly. Overall, the cost of an hour of driving rose to 20.99 €, an increase of more than 7.5 % compared to 2015. As a reminder, the cost recorded by the CNR in 2015 was 19.52 €/hour.

2.1. OVERVIEW OF THE OPERATING CONDITIONS AND COSTS OF A “TYPICAL” INTERNATIONAL HGV

Operating conditions and costs of a 40-tonne HGV operated on long distance international routes, 2020 conditions 		
	unit	Spain* Simulation
Yearly mileage of a vehicle	km	141,200
Number of operating days	days/year	244
Semitrailer/tractor ratio		1.35
Driver cost	€/year	41,565
Driver/tractor ratio		1.04
Yearly cost of vehicle financing and possession	€/year	15,234
Average consumption per 100 km	litres	29.9
Unit fuel price, 2020 average**	€/litre	0.8406
Fuel cost	€/year	35,489
Tyres	€/year	3,180
Maintenance-repair	€/year	6,500
Tolls and vignettes	€/year	19,000
Insurance (vehicle)	€/year	2,270
Axle tax and other vehicle taxes	€/year	601
Synthesis - cost price (excluding overhead cost)		125,501
Cost/mileage ratio per annum	€/km	0.89
Overhead costs	€/year	8,785
Synthesis - full cost price		134,287
Full cost per kilometre	€/km	0.95

Source : CNR Europe studies

* Field of survey: Basque Country, Catalonia and Madrid

Catalan driver working internationaly (Tarragona collective agreement)

** After partial refund of excise duties

According to CNR calculations, the cost per kilometre of a Spanish 40-tonne heavy goods vehicle used for international long-distance transport by a Catalan haulier, excluding overhead costs, is 0.89 € compared with 0.84 € in 2015, an increase of more than 6% compared with the last study. Certain cost items such as the driver cost (+9.7%), the cost of ownership (+8.2%), the toll item (+25%) and the maintenance and repair item (+18.2%) have increased significantly compared to 2015.

Ultimately, when overhead costs (estimated at around 7% of the total cost) are factored in, the cost price in 2020 is estimated at 0.95 € per kilometre. This estimate is in line with the information provided by the hauliers, who estimate their cost price at between 0.86 €/km and 1 €/km.

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