EUROWAG

Best one-off publication, Awarded the Felix 2024 prize

# Transforming transportation in 2026

Market trends and inspirations for a clean, fair and efficient CRT business.

Includes case studies from 7 European markets.

Go far.

eurowag.com

November 2025

# Contents



Go far.
On the road. In business. In life.

# Dear readers,

I'm pleased to share the second edition of Eurowag's State of Commercial Road Transport report for 2025. Under the title Transforming Transportation, it reflects on the year's key market trends, carrier insights, and developments that have shaped the industry and continue to influence its future.

The 2025 edition covers seven markets and highlights 21 leading industry partners; carriers who continue to operate in demanding conditions while embracing innovation to deliver their services more efficiently and sustainably. At Eurowag, our integrated solutions are built to help transport companies navigate these challenges, modernize their operations, and stay competitive in a rapidly evolving landscape. Our own transformation also continues as we move toward becoming a fully data-driven company, bringing customers and solutions together on our digital Eurowag Office platform.

It is my hope that the insights shared in this report will inspire readers to push boundaries, embrace change, and achieve new levels of success. Together, we can build a cleaner, smarter, and more resilient future for European road transport.

**Sincerely,**
**Martin Vohánka**
Founder and CEO
Eurowag

The Eurowag Group supports a vast and varied network of clients across the commercial road transport industry, a sector that contributes roughly 5% to Europe's GDP. It is a vital part of modern life—every product, at some stage, travels by truck.

This report features a group of remarkable companies from multiple markets and sectors, each influencing fleet operations, planning, and safety. They exemplify three key routes to excellence: industry leadership, technological innovation, and sustainability commitment.

### Market Leader

Market leaders stand out for their scale, long-standing presence, and full-service capabilities. They combine expertise, strong brands, and operational excellence to deliver efficiency and reliability. Through consistent results, strategic growth, and deep market insight, they define benchmarks that others follow. Their reputation for quality and innovation builds customer trust and sets the pace for industry progress.

### Tech Trailblazer

Tech Trailblazers are innovators harnessing technology to transform operations—whether in telematics, navigation, fleet management, or digital payments. Their use of data-driven solutions cuts delays, lowers costs, and enhances overall efficiency. By digitizing workflows and connecting data systems, they simplify complex processes and steer the industry toward a smarter, more integrated, and automated future.

### Sustainability Star

Sustainability Stars lead the transition to cleaner transport through green technologies and responsible operations. By adopting alternative fuels, hybrid and electric vehicles, and intelligent route optimization, they curb emissions and improve fuel efficiency. Their use of telematics ensures ongoing performance improvements. These companies go beyond compliance — setting higher environmental standards and proving that operational excellence and ecological responsibility can thrive together.

## New commercial vehicle registrations in EU (Q1-Q3 2025)

# Total 225 483

### Change (Q1-Q3 2024): -9,8%

**187 298** Heavy trucks*

**38 185** Medium trucks**

* Heavy commercial vehicles of 16 tonnes and over

** Medium commercial vehicles between 3.5 and 16 tonnes

Source: ACEA

## Certified parking spots in 2025 in European Union

Source: Study on the availability of suitable rest facilities for professional drivers and secured parking facilities (January 2025)

# 23 651

Available certified parking spaces in total

# -390 057 gap

## European road freight volume in 2024*

# 1 868 967

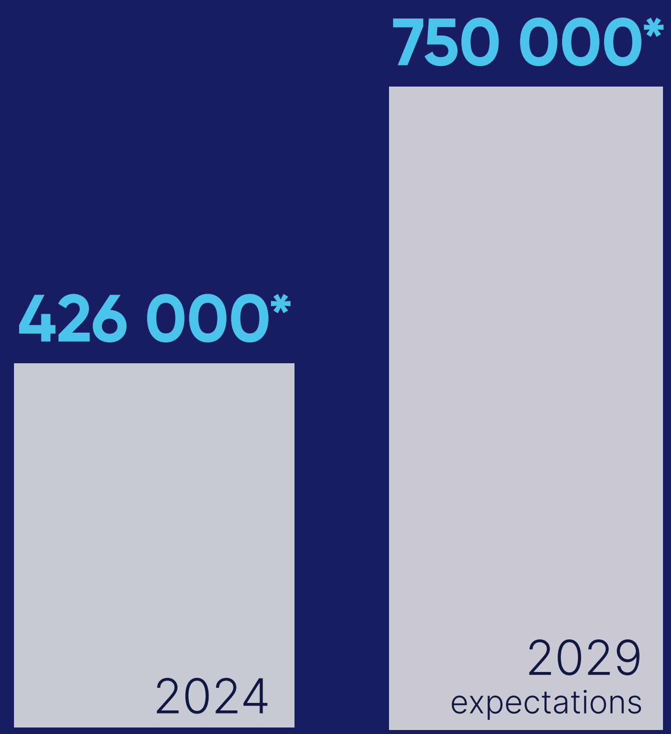
### YoY change (2023): 11 961

* in millions of tonne-kilometers

Source: eurostat data 2024

Scope of countries: EU-27

## Truck driver shortage in Europe




### YoY change:

# +193 000

### unfilled positions

* number of drivers

Scope of countries: EU-27 + Norway and the United Kingdom

Sources:

Europe's truck drivers shortage: challenges and responses

Polish Road Transport Institute Foundation

## Featured markets

- Poland
- Spain
- Romania
- Czechia
- Hungary
- Portugal
- Slovakia

# Poland

# Poland: Market overview and outlook

The past few years have been challenging for the road transport industry in Poland, as the sector has faced rising costs and declining freight rates. However, the latest data indicates an increase in demand and rates in the transport market, accompanied by a noticeable improvement in sentiment among Eurowag's Polish customers. The Polish Road Transport Institute notes that by mid-year, demand from shippers looking for transport services increased on routes to and from Poland. The strongest growth was recorded on the Denmark–Poland route, where demand rose by as much as 97%. A noticeable rebound was also seen on popular routes such as Germany–Poland (up 25%) and the United Kingdom–Poland (up 22%). Is this the end of the crisis? It may still be too early for such an optimistic conclusion, yet the fact remains that the market is stabilizing and showing growth potential.

Our clients' fleets are expanding, and transport companies are growing more confident in making new investment and business decisions. This trend is particularly visible among medium and large enterprises, where owners are more willing to purchase new vehicles. What is especially important is that these decisions are no longer driven by intuition or competitors' behavior, but are based on data analysis. To obtain and leverage this data, companies are embracing digitalization and investing in integrated solutions that help monitor and optimize fleet profitability. 54% of Polish transport companies are to invest in process digitalisation – a 14 percentage point increase compared to the 2023 Transport and Logistics Poland. Supporting this process are TMS systems, telematics, and working time management tools.

Another visible trend in the Polish transport sector is the shortage of both drivers and dispatchers. Over the past year, the vacancy rate in Poland's transport, shipping and logistics sector reached its highest level on record – 44% higher than the national average across all industries. This is a clear sign that the labour shortage in the sector is becoming an increasingly serious challenge. By 2026, companies will need to ensure they are perceived as attractive employers, which means not only offering employee benefits but, above all, providing appealing remuneration rates, safe working and resting conditions, and convenient tools for communication and reporting.

In the coming year, companies should also pay close attention to the issue of decarbonization, as the European Union continues to tighten climate regulations. Soon, ESG reporting obligations in the transport sector will no longer apply only to large corporations but will also include small and medium-sized enterprises. As a result, alternative fuels—particularly HVO as a substitute for diesel—will gain importance among Polish transport companies.

At Eurowag, we support our customers on their path toward decarbonization, assisting them in fleet electrification and expanding our network of stations that enable charging heavy-duty vehicles and refueling with HVO and bioLNG.

**Radoslaw Tatarski**
Interim Country Manager
for Poland

## New commercial vehicle registrations (Q1-Q3 2025)

| | Heavy commercial vehicles of 16 tonnes and over | Medium commercial vehicles between 3.5 and 16 tonnes | Total | YoY change (Q1-Q3 2024) |
|---|---|---|---|---|
| Poland | 19 686 | 2 009 | 21 695 | 3,4% |
| Spain | 17 533 | 3 394 | 20 927 | -7,9% |
| Romania | 6 087 | | 6 087 | -4,9% |
| Czechia | 6 570 | | 6 570 | -3,8% |
| Hungary | 3 470 | 237 | 3 707 | -12,2% |
| Portugal | 3 832 | 426 | 4 258 | -8,2% |
| Slovakia | 2 052 | 218 | 2 270 | -12,4% |

Heavy commercial vehicles of 16 tonnes and over

Medium commercial vehicles between 3.5 and 16 tonnes

Source: ACEA

## Certified parking spots in 2025 in European Union

* in millions of tonne-kilometers

Sources:
Published overviews of available parking locations for trucks certified by EU SSTPA standard, ESPORG, and TAPA

Study on the availability of suitable rest facilities for professional drivers and secured parking facilities (January 2025)

| | Certified parking spots | Gap |
|---|---|---|
| Poland | ~1 400 | ~23 000 gap |
| Spain | ~1 800 | ~20 000 gap |
| Romania | ~500 | Gap – thousands, especially along transit routes to Hungary and Bulgaria (exact numbers not available) |
| Czechia | ~700 | ~2 000 gap |
| Hungary | ~300 | Gap – thousands, especially along core transit corridors (exact numbers not available) |
| Portugal | ~400 | Gap – multiple thousands (exact numbers not available) |
| Slovakia | ~300 | Gap – low thousands based on comparable transit and network size (exact numbers not available) |

## Road freight volume in 2024*

* in millions of tonne-kilometers

Source:
eurostat data 2024

| | Volume | YoY change |
|---|---|---|
| Poland | 368 314 | -9 559 |
| Spain | 271 588 | +8 206 |
| Romania | 67 357 | +2 108 |
| Czechia | 70 346 | +5 540 |
| Hungary | 34 231 | +878 |
| Portugal | 23 043 | -3739 |
| Slovakia | 30 562 | +4 182 |

## Market players

Market Leader

**ELMEX Group Sp. z o. o.**

Tech Trailblazer

**RP-TRANS Sp. z o. o.**

Sustainability Star

**LOGIUS Sp. z o. o.**

# Market Leader

Company: E-logis
(of the Elmex Group)
Country: Poland


# ELMEX GROUP: Technology and sustainability as driving forces

Operating continuously since the 1990s, the Elmex Group has grown into one of the largest transport companies in the region. Today, it manages a fleet of more than 300 modern vehicles and employs over 400 drivers who cover more than 3.5 million kilometers every month – with almost the same distance additionally covered by the Group's subcontractors. The company's trucks can be seen on roads across almost all of Europe from Spain, Portugal, and Italy, through Scandinavia and the British Isles, all the way to Greece. Despite a wide range of travel, its key markets remain Germany, the Benelux countries, Austria, and the Czech Republic. Serving a wide range of highly demanding industries on a daily basis requires a strong sense of responsibility. For years, Elmex has invested in modern and environmentally friendly solutions—digitalizing operations, regularly upgrading its fleet, and developing transport based on alternative fuels such as bioLNG and HVO100. How does a company maintain stability in an unpredictable market? The case of Elmex provides some answers.

"

**Alternative fuels already account for half of our total refueling volume. Our clients receive certificates confirming emission reductions, while we gain a competitive edge in tenders that increasingly require a low-emission fleet.**

## From a family business to global challenges

The company's history dates back to the mid-1990s. Its beginnings were typical for that era—a small operation that grew steadily, initially focusing on cooperation with the local automotive industry. "Given our proximity to the Volkswagen plant, it was only natural that we started out in automotive transport," **recalls Krzysztof Potok, Co-owner, Elmex Group.**

Over time, both the client portfolio and the range of transported goods expanded from retail, e-commerce, and FMCG, through agriculture and agribusiness, to heavy industry, high-value goods, and temperature-controlled cargo. Today, the company operates across many specialized sectors, though its core activity remains full truckload (FTL) transport.

The following decades brought dynamic growth and several turning points. One such instance was the decision to expand their cooperation with other carriers. At first, all transport was handled exclusively by the company's own fleet, but as the business scaled up, Elmex began to work with subcontractors. As a result, while it owns around 300 trucks, it effectively manages a fleet of nearly 550 vehicles.

Another milestone was the move into low-emission transport. Five years ago, Elmex launched a project involving LNG-powered trucks—today fully running on bio-LNG—and has since grown this fleet to 130 vehicles. This step opened a new chapter in the company's history, combining business development with environmental responsibility. An additional element of this transformation is the company's own LNG station in Rzepin, which accepts Eurowag cards.

## Green transport

Elmex took its first steps towards green transport back in 2020. At that time, it was one of only three companies in Europe to gain access to bioLNG and began testing vehicles powered by this fuel.

"Even then, we were convinced that the future of transport lay in low-emission solutions, and we wanted to be a leader in that shift. Today, what started as experimentation has become part of our daily operations. Out of more than 300 vehicles in our fleet, an ever-growing number of them run on bioLNG and HVO100. Alternative fuels already account for half of our total refueling volume. Our clients receive certificates confirming emission reductions, while we gain a competitive edge in tenders that increasingly require a low-emission fleet," says Potok.

A key partner in this process is Eurowag. Through this cooperation, drivers have access to a network of stations offering bioLNG and HVO100, enabling further scaling of green transport solutions.

"Economics still takes precedence in our industry, which is why electric trucks remain in our plans, rather than on the road for now, as we are open to that technology as well. But wherever real change can already be made, such as with bioLNG or HVO100, we act boldly and consistently," emphasizes Potok.

Elmex trucks are equipped with photovoltaic panels that help reduce engine idling and lower fuel consumption while driving. The transformation, however, has not stopped with the vehicles - the entire operations base is now powered by energy from the company's own photovoltaic panels. This way, Elmex reduces its carbon footprint not only on the road but also in its day-to-day operations.

## The road ahead

Although the transport market can be unpredictable, Elmex looks to the future with confidence. Its stability, built on long-term contracts and direct cooperation with clients, has allowed the company to withstand economic fluctuations without losing ground.

"The transport and logistics market naturally goes through certain changes, but we don't experience major turbulence. For us, the situation remains stable," stresses Potok.

That does not mean the industry is free of challenges. One of the most pressing issues is the shortage of drivers — a problem Elmex has been addressing proactively for years. It was among the first companies to bring in drivers from Ukraine, and later, from Asia. Today, this initiative has grown into a structured international program, complete with its own recruitment agency and training centers all over the world, preparing future drivers for work in Poland. The agency provides employees not only for the Elmex Group, but also for other transport companies.

Cost pressures and increasing EU regulations mean the company is constantly seeking savings and efficiency gains. Here, technology plays a crucial role. **Modern telematics, artificial intelligence supporting operational processes, and a 15-year collaboration with Eurowag on the Marcos TMS system**—which helps monitor payments and assess the profitability of transport orders—**are all examples of solutions helping Elmex cut costs and be more efficient.** In an industry where margins are under constant pressure, innovation has become the company's strongest ally.

When asked about the greatest challenges for the future, Krzysztof Potok responds with a smile: "If I had a magic lamp, I'd wish for more predictability. Our sector is regularly caught off guard by new EU regulations, which are often difficult for Polish carriers to comply with. Fewer sudden regulatory shifts, a more stable environment, and we'll handle the rest ourselves. Competitiveness is in our DNA," he concludes.

> Modern telematics, artificial intelligence supporting operational processes, and a 15-year collaboration with Eurowag on the Marcos TMS system—which helps monitor payments and assess the profitability of transport orders—are all examples of solutions helping Elmex cut costs and be more efficient.


Company name:

**ELMEX Group Sp. z o. o.**

Year of foundation:

**1994**

Fleet size:

**300** own vehicles

**450** subcontracted vehicles

Total revenue in 2024:

**€75.7m**

Number of employees:

**550**

Usage of Eurowag products by type:

- Fuel cards
- Alternative fuels
- Navigation

Owners:

**Maciej Potok, Ilona Potok, Krzysztof Potok**

Geographical scope:

**Entire Europe**

# Tech Trailblazer

Company:
RP-TRANS Sp. z o. o.
Country: Poland

# RP-TRANS: Not just keeping up, but leading the way

**In recent years, while market turbulence brought many transport businesses to a standstill, RP-TRANS from Bydgoszcz was gaining momentum. Its leadership seized the opportunity presented by the courier sector's rapid growth and with prior experience in this segment, they were able to move faster than the competition. Today, the company works with some of the biggest players in the industry, including DPD Group, InPost and FedEx. But they're not slowing down. On the contrary, they're hungry for further growth, driven by technology and data analysis.**


Their approach to innovation is simple: they test new solutions, adopt only those that deliver real value, and implement them consistently. As a result, they're seen not only as a company that keeps up with the trends, but one that stays ahead of them.

For several years now, the transport sector has been operating under constant pressure—from geopolitical shifts and economic uncertainty to tightening regulations. The war in Ukraine, rising fuel prices, legislative ambiguity, and increasingly strict environmental standards have caused many companies to freeze investments and scale back operations.

> **We want to be fully prepared for the moment when ESG reporting becomes the standard across the entire market.**

RP-TRANS, however, saw opportunity where others saw only risk. The company tapped into the courier sector's rapid expansion and quickly became a key logistics partner for some of the industry's leading players. "What helped us scale our operations was the quality of our service, our responsiveness, and our flexibility in adapting to client needs. That's what brought major partners on board. In difficult times, success depends on the ability to think beyond the next contract, and the courage to step into the unknown," says Damian Brywczyński, Board Member at RP-TRANS.

The company's ability to identify this niche and respond quickly to demand came down to the experience and expertise of its leadership team. **Paweł Bukowiński, Damian Brywczyński, and Sławomir Czubak** are all seasoned professionals with first-hand knowledge of both the transport sector and the needs of last-mile delivery operators.

Today, RP-TRANS focuses primarily on transport services for the courier industry, helping build modern, precisely coordinated logistics systems that ensure on-time deliveries across Poland and Europe. At the same time, the company remains open to new opportunities within the transport sector and continues to expand its service offering. One of its newest ventures is freight forwarding, covering routes in Western Europe as well as specialist transport using car carriers and platforms.

## Next-generation fleet

Sustainability requirements are increasingly becoming a key criteria for selecting partners in the transport and logistics sector. While ESG (Environmental, Social & Corporate Governance) reporting is not yet mandatory for all companies, the largest brands are already expecting their subcontractors to align with these standards. RP-TRANS is staying ahead of the curve by treating its fleet not just as a means of transport, but as a competitive advantage.

The company continues to invest in a young, modern fleet, viewing it as one of the cornerstones of operational efficiency. Industry data shows that over 73% of transport companies in Poland report an average fleet age of under five years. At RP-TRANS, the average vehicle is under three years old and by 2026, two-thirds of the fleet is expected to be less than 12 months old. This strategy helps the company maintain strong operational performance while reducing emissions.

At the same time, RP-TRANS is closely monitoring developments in alternative drive technologies. While the current fleet runs exclusively on diesel engines – compliant with the highest emissions standards – the company is actively exploring new solutions. Its first electric vehicle is already in operation at the Bydgoszcz depot, and trials of a second one will soon begin in collaboration with a key partner.

"We're always open to testing new solutions, but we only implement those that truly fit our scale and business model. It's all about not just meeting client expectations, but getting ahead of them. We want to be fully prepared for the moment when ESG reporting becomes the standard across the entire market," states Brywczyński.

## Scaling up with technology

While many transport companies were putting their investments on hold, RP-TRANS was expanding its operational facilities and rolling out new management systems. A larger operations base, workshop, paint shop, and vehicle inspection station enabled the company to reduce reliance on external service providers and manage its fleet more efficiently.


> **RP-TRANS uses Eurowag's GBox system, which enables route optimization to ensure each trip is as cost-effective and time-efficient as possible.**

The company's site in Bydgoszcz is equipped with solar panels and a heat pump, allowing RP-TRANS to significantly reduce its energy consumption while meeting the growing expectations of partners who request data on emissions and carbon footprint more frequently.

"We want to maintain full control over the factors that impact the quality of our work. That's why we're building our infrastructure in a way that minimizes our dependence on external services," explains the Board Member.

Data plays a central role in fleet management today. RP-TRANS uses Eurowag's GBox system, which enables route optimization to ensure each trip is as cost-effective and time-efficient as possible. In the courier sector – where delivery times are often measured down to the minute – this kind of solution is a key operational asset.

**"When we spot potential delays on a route caused by unforeseen road conditions, we can respond quickly – rerouting the vehicle so the delivery still arrives on time. In planning our transports, we rely on the GBox telematics ETA module, which alerts us to delays and updates the remaining distance in real time, factoring in elements like road conditions and driver working hours. This helps us stay on top of delivery schedules and give our clients complete transparency – backed by facts, not guesswork," says Brywczyński.**

Currently, the company is preparing to implement the Marcos TMS system. After a pre-implementation analysis, the decision was made to continue adapting it to fit their own operational model. RP-TRANS currently uses a proprietary TMS developed by an in-house programmer, but the growing scale of operations demands broader functionality and integration.

"We want a clear picture not only of the fleet but also of the cost side. This provides greater predictability and allows us to make better decisions," he explains.

At RP-TRANS, technology is not an end in itself. Only solutions that deliver measurable operational or financial benefits are implemented.

## Innovations that get the job done

So far, the future of the transport industry doesn't look very bright. International tensions and market instability mean that staying competitive requires flexibility, cost optimization, and the ability to react quickly to change. RP-TRANS doesn't ignore these challenges, but unlike many companies, it doesn't let them bring progress to a halt. Their approach is based on testing solutions that boost efficiency and operational independence. This lets them maintain stability, scale their operations, and meet the demands of international clients.

RP-TRANS places its hopes on partnerships with strong Polish-rooted brands expanding into foreign markets. This is an important direction and a business ambition they are committed to pursuing consistently.

"We see great potential in collaborating with Polish companies that think globally. We want to jointly carry out projects on an international scale," adds Brywczyński.

The management team is certain that the coming years will demand even greater resilience from transport companies and readiness to implement changes from technology to ESG. RP-TRANS declares it won't wait for regulations but aims to stay one step ahead.

"For us, innovation is not just a buzzword, but a tool for doing good work every day," **Brywczyński** concludes.

# "For us, innovation is not just a buzzword, but a tool for doing good work every day.

Company name:

**RP-TRANS Sp. z o. o.**

Year of foundation:

**2010**

Fleet size:

**300** tracktor units

**450** trailers

Turnover 2024:

**€35.5m**

Number of employees:

**490**

Usage of Eurowag products by type:

Gbox

Macros TMS

Working-time management expert

Founder/ Managing director:

**Paweł Bukowiński**

Geographical scope:

**Western and Central-Eastern Europe, Baltic countries**

# Sustainability Star

Company:
LOGIUS Sp. z o. o.
Country: Poland


# LOGIUS: ESG is their new normal, so is the transition to a greener fleet

**LOGIUS isn't waiting for sustainable transport to become an industry standard, it operates as if it already is. In just over a decade, the company has evolved from a small freight forwarding business into a modern logistics operator with its own fleet, serving some of the biggest players in e-commerce and industry.**

Low-emission technology has become a competitive edge for LOGIUS, opening doors to contracts still out of reach for most rivals.

LOGIUS was founded in 2010 as a sole proprietorship focused on freight forwarding. Just a few years later, it became a limited liability company, and the management board made the strategic decision to invest in its own fleet – a move that opened the door to further growth.

"We understood that if we wanted to build credibility and grow in the market, we needed our own vehicles. **Clients expect not only efficient service, but also full control over the transport process and we wanted to be able to deliver that**," says Mateusz Gromanowski, CEO of LOGIUS.

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## Our partnership with Eurowag supports this approach, giving us access to over 400 LNG stations across Europe for refuelling with bioLNG and renewable diesel.


Purchasing their first trucks marked the beginning of a dynamic transformation. The company gradually developed its expertise in transport and logistics, which helped it win clients in the paper, steel, and automotive industries – and break into the fast-growing e-commerce sector. LOGIUS soon caught the attention of German investor Reinert Logistics, which acquired a majority stake in 2022.

"Today, transport, not freight forwarding, is the core of our business. It's a natural direction, both for our growth and in response to what clients expect," the CEO adds.

### Sustainable transport as a business strategy

Growing expectations from clients are driven primarily by EU regulations. LOGIUS's management quickly recognised that the EU's climate targets – including a **40% reduction in $CO_2$ emissions by 2030 and climate neutrality by 2050 – are no longer a distant goal, but a business requirement.** As global corporations adapt to new reporting obligations, they increasingly demand concrete action from their partners as well. That's why LOGIUS decided to invest in technologies that reduce $CO_2$ emissions. The company's fleet now includes vehicles running on HVO100 and BioLNG, with electric trucks currently undergoing testing. The CEO sees long-term potential in a mixed powertrain model and is committed to exploring different technologies to ensure the company is ready for what's ahead.

"**If we can provide a customer with a certificate confirming an 80–90% reduction in $CO_2$ emissions, we gain a real competitive edge, including access to regular transport lanes and the most attractive contracts.** Investing in low-emission solutions is no longer just about brand image; increasingly, it's a condition for participating in tenders and working with the largest companies. Our strategy focuses on steadily expanding a fleet powered by alternative fuels – HVO100 and BioLNG – while testing electric trucks to build hands-on experience and prepare for future regulatory requirements. Our partnership with Eurowag supports this approach, giving us access to over 400 LNG stations across Europe for refuelling with BioLNG and renewable diesel," explains Gromanowski.

LOGIUS is also proactively preparing for upcoming ESG reporting requirements. Although not yet mandatory, the company is already implementing processes that allow it to measure and report its environmental impact in a reliable and transparent way.

One of the pillars of this approach is regular fleet modernisation. Vehicles are replaced frequently – the average age is currently between one and two years. The company orders new trucks that meet the latest emissions standards and aligns its purchasing decisions with the results of environmental impact assessments.

"Our fleet currently includes 50 vehicles – tractor units, semi-trailers, and BDF swap-body sets used to transport interchangeable containers for some of the largest logistics operators. Investing in new vehicles is a key part of our business strategy. It allows us to cut harmful emissions by several dozen percent compared to older models, lower our operating costs, and improve our chances of winning new contracts. **We're also open to electric vehicles – we've already taken the first steps to understand how the technology works, test it in practice, and possibly integrate it into our operations over time. In my view, the future of sustainable transport lies in combining available technologies rather than relying on full fleet electrification alone**," says Gromanowski.

### Technology supporting driver training

LOGIUS uses data from its telematics system and eco-driving module not just to monitor real-time fleet performance, but primarily to optimize routes, cut operational costs, support drivers in improving their driving behavior, and better meet customer expectations. Analyses are carried out in collaboration with ESG experts, and the insights are used both to improve internal operations and to ensure transparent communication with business partners.

Drivers play a crucial role in this process – many environmental performance indicators depend directly on the decisions they make behind the wheel each day. LOGIUS tracks these indicators and works continuously to improve them.

"What we're really doing is reshaping driving habits," explains Gromanowski. "**We teach our drivers how to use predictive cruise control, how to brake earlier, and how to maintain proper tire pressure.** This leads to lower fuel consumption and reduced wear on tires, brake pads, and discs, which means lower emissions and lower costs. **We run regular training sessions in cooperation with vehicle manufacturers and Eurowag. The eco-driving module and GBox system provide detailed insights into driving styles, which we review one-on-one to help drivers grow and encourage more efficient driving.** A company like ours simply can't operate without telematics. Driving behavior data and performance scores are our baseline. We can compare results across drivers, send individual reports, and show them what they're doing well and what still needs improvement," he adds.

## All data in one place

For LOGIUS, relying on a single provider has significantly simplified day-to-day fleet and operations management. The tools they use, such as the **GBox telematics system and the 4Trans driver work time tracking software from Eurowag, are fully integrated.** This allows for fast data analysis, efficient transport order processing, and smoother internal communication. The result: saved time, fewer errors, and seamless information flow – something that would be hard to achieve with disconnected systems.

"Having access to fuel, including alternative fuels, telematics, driver work time tracking, and other services all in one place makes it much easier to manage transport across multiple areas. We also appreciate the clear and intuitive platform that keeps everything organized. On top of that, we regularly draw on the expertise of OCRK consultants, who support us in ensuring that driver settlements are fully compliant with current legal requirements," explains the CEO of LOGIUS.

LOGIUS proves that smart management and a readiness to adapt can drive success even in challenging times for the transport industry. What began as a small operation has evolved into a modern company with a fleet of several dozen vehicles, gaining the attention of a major German logistics player. **Through its partnership with Eurowag, investments in sustainable technologies, and a data-driven approach to fleet management, LOGIUS shows that sustainability can be a true competitive advantage.**

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**Having access to fuel, including alternative fuels, telematics, driver work time tracking, and other services all in one place makes it much easier to manage transport across multiple areas.**


Company name:

**LOGIUS Sp. z o. o.**

Year of foundation:

**2010**

Fleet size:

**40** vehicles and subcontractors, and freight forwarding

Turnover 2024:

**~€9.4m**

Number of employees:

**50**

Usage of Eurowag products by type:

Fuel cards

Diesel

HVO 100

Founder/CEO:

**Mateusz Gromanowski**

Geographical scope:

**Entire Europe**

# Spain

# Spain: Market overview and outlook

In 2024, the Spanish road freight transport market showed resilience and moderate growth, with a 2.65% increase in tonne-kilometres (tkm) compared to the previous year. Spain now represents approximately 14.5% of EU road freight activity, confirming our solid position as a key logistics hub in Europe. By 2026, the market is expected to expand by 3.2%, supported by the agriculture, industry, and chemical sectors, along with ongoing investment in fleet renewal and digital infrastructure.

## Key trends shaping 2025

The road transport market continues to navigate structural challenges. A shortage of qualified drivers and rising operational costs —especially in fuel and insurance— continue to pressure margins. With around 120,000 active companies, the Spanish market is highly fragmented. The top five operators control around 15% of the market, while the ten largest account for 22%. Most companies operate small fleets, focusing primarily on national transport, which continues to account for over 60% of domestic freight movement. International flows, especially to France, Germany, and Italy, are growing steadily, driven by stronger EU integration and improved transport corridors.

The industry in Spain is also adapting. In the last year, we've seen growing interest in modernizing operations and fleets, even if adoption rates vary by region and company size. While not yet dominant, sustainability and digital tools are becoming more common in strategic planning, particularly among mid-sized operators seeking efficiency gains. Initiatives around alternative fuels, route optimization, and EETS solutions are helping companies reduce emissions and improve cost control, while automation and data analysis enable smarter, more transparent services, especially in cross-border and long-haul operations.

## Looking ahead to 2026

Spain's road freight sector must double down on two parallel priorities: decarbonization and digitalization. Fleet upgrades, expanded refueling infrastructure, and smarter tools will be essential to remain competitive in a market where price alone is no longer enough.

We are in a moment of transition, but it's one filled with opportunity. Spain is well-positioned to lead on innovation, resilience, and sustainable logistics within Europe. Now is the time to invest, modernize, and move forward together.

**Filippo Welter**
Country Manager
for Spanish market

## New commercial vehicle registrations (Q1-Q3 2025)

| | Heavy commercial vehicles | Medium commercial vehicles | Total | YoY change (Q1-Q3 2024) |
|---|---|---|---|---|
| Poland | 19 686 | 2 009 | 21 695 | 3,4% |
| Spain | 17 533 | 3 394 | 20 927 | -7,9% |
| Romania | 6 087 | | 6 087 | -4,9% |
| Czechia | 6 570 | | 6 570 | -3,8% |
| Hungary | 3 470 | 237 | 3 707 | -12,2% |
| Portugal | 3 832 | 426 | 4 258 | -8,2% |
| Slovakia | 2 052 | 218 | 2 270 | -12,4% |

Heavy commercial vehicles of 16 tonnes and over

Medium commercial vehicles between 3.5 and 16 tonnes

Source: ACEA

## Certified parking spots in 2025 in European Union

* in millions of tonne-kilometers

Sources:
Published overviews of available parking locations for trucks certified by EU SSTPA standard, ESPORG, and TAPA

Study on the availability of suitable rest facilities for professional drivers and secured parking facilities (January 2025)

| | Certified parking spots | Gap |
|---|---|---|
| Poland | ~1 400 | ~23 000 gap |
| Spain | ~1 800 | ~20 000 gap |
| Romania | ~500 | Gap – thousands, especially along transit routes to Hungary and Bulgaria (exact numbers not available) |
| Czechia | ~700 | ~2 000 gap |
| Hungary | ~300 | Gap – thousands, especially along core transit corridors (exact numbers not available) |
| Portugal | ~400 | Gap – multiple thousands (exact numbers not available) |
| Slovakia | ~300 | Gap – low thousands based on comparable transit and network size (exact numbers not available) |

## Road freight volume in 2024*

* in millions of tonne-kilometers

Source:
eurostat data 2024

| | Road freight volume | YoY change |
|---|---|---|
| Poland | 368 314 | -9 559 |
| Spain | 271 588 | +8 206 |
| Romania | 67 357 | +2 108 |
| Czechia | 70 346 | +5 540 |
| Hungary | 34 231 | +878 |
| Portugal | 23 043 | -3739 |
| Slovakia | 30 562 | +4 182 |

## Market players

**Market Leader**
**Ibertinsa S. A.**

**Tech Trailblazer**
**Barquín y Otxoa S. L.**

**Sustainability Star**
**GEXA TRUCK SERVICE S. L.**

# Market Leader

Company: Ibertinsa S. A.
Country: Spain


# Ibertinsa: Excellence, loyalty, reliability, and service segmentation

**In a sector where differentiation is difficult due to high competition, a limited market, and constant tension between falling prices and rising costs, Ibertinsa has managed to become a benchmark for service excellence and differentiation, earning the trust of major companies and securing their loyalty with every service. Based in Madrid, this family-owned company has been in business for over 50 years. Since its inception, it has recognized the need to provide reliable, high-quality services. Its vision has always been to develop a true partner relationship with its clients, which has allowed it to grow alongside major companies, opening doors in certain segments where it has differentiated itself and has more limited competition.**

## Milestones achieved alongside key clients

Today, the company specializes in road feeder services (RFS) for air cargo, international express transport, pharmaceutical products, and high-value goods.

In road feeder services, a highly niche sector, Ibertinsa is now a reference player for some of the leading air cargo companies. In international express transport, which involves urgent international parcels, operations require unconventional solutions such as double drivers and relay systems. Ibertinsa holds GDP certification for the pharmaceutical segment and has adapted to meet the highly complex requirements of the sector, where each product has very specific conditions. A similar approach is required for high-value cargo, which additionally demands robust security measures to prevent theft attempts.

As CEO Miguel Quintana explains: "Our milestones stem from entering different market segments alongside key clients, thereby growing and strengthening our client portfolio. The full-load freight sector is the most difficult to differentiate in; the key lies in finding market niches with fewer competitors, where a commitment to excellent-quality service is valued." Far from taking success for granted, Ibertinsa has consistently taken calculated risks, pioneering specialization in its sectors and serving as a guiding light for other companies.


Currently, the company operates a fleet of 160 trailers and 130 tractors (mixed model: owned and subcontracted), which are 3 years old on average. Given the specific requirements of their services, the fleet includes mega or low-floor trucks, conventional trucks, refrigerated vehicles, rollerbed trailers, and trucks with security covers. Trailer height is also key for air cargo, requiring a lower wheelbase to increase usable height.

## Aligned with national and global economic trends

The transport market's volume is closely tied to economic conditions, both national and international. It is a cyclical industry, generally with flat demand, tight margins, and high exposure to losses.

"We are part of a highly fragmented sector where it is difficult to pass costs on to prices. We face significant rigidity in pricing due to market concentration and reduced supply. What we need to do is adapt while continuing to provide high-quality service with added value.", adds Quintana.

## Technology at the core of operations

For Ibertinsa, technology is essential to achieve the level of service quality required. It supports traceability, driver and cargo safety, and vehicle monitoring, allowing them to evaluate driving behavior and detect technical issues early. Technologies help them with planning and execution, including vehicle utilization optimization and route planning.

They use AI for efficiency improvement and a digital C MR with multiple operational benefits.

On the cost-saving side, Eurowag has become a key partner, especially in fuel management.

## Looking ahead: An uncertain yet sustainable future

In a sector so dependent on economic and geopolitical conditions, long-term forecasting is nearly impossible. The key is to stay prepared and adaptable to changing market needs and situations.

Ibertinsa integrates sustainability and decarbonization into its management approach through transport optimization and carbon footprint measurement. They also implement advanced truck technology, solar panels, biofuels, HVO, and double-trailer trucks.

"When we talk about sustainability, we need to encompass environmental, economic, and social factors. This means that the costs arising from these initiatives should be distributed across the entire transportation value chain," concludes Miguel Quintana.

For Eurowag, partnering with companies like Ibertinsa reflects quality, excellence, and a strong position in specialized markets. For the wider industry, these businesses set the standard and provide inspiration for others.

Company name:

**Ibertinsa S. A.**

Year of foundation:

**1976**

Fleet size:

**130** tractors

Usage of Eurowag products by type:

Fuel cards

Revenue 2024:

**€25m**

Number of employees:

**175**

Founder/CEO:

**José Manuel Miranda/ Miguel Quintana**

Geographical scope:

**International FTL**
**Iberia**
**Germany**
**Benelux**
**France**

# Tech Trailblazer

Company:
Barquín y Otxoa S. L.
Country: Spain


# Barquín y Otxoa: Efficiency, specialization and long-term vision in an uncertain environment

Barquín y Otxoa

**In a market like road transport, where price volatility, regulatory pressure and a shortage of talent define a demanding and changing landscape, Barquín y Otxoa has managed to establish a model of sustained growth that combines efficiency, sector specialization and a firm commitment to new technologies. Based in Alava, Spain, this family business with decades of experience has become a key player in capillary food transport thanks to an agile structure, a customer-centric approach and a clear strategy to meet current challenges without losing sight of the future.**

## Steady, planned growth

According to Iñaki Iturrioz, Managing Director of Barquín y Otxoa, "the first half of 2025 is proving positive for the company. The cumulative figures show improvement compared to the same period in 2024, partly thanks to the addition of new vehicles and the consolidation of routes that were recently in their startup phase." Far from growing at any cost, Barquín y Otxoa has opted for methodical expansion, allowing them to take on new clients and routes without compromising their operational reliability.

The company currently owns a fleet of 257 vehicles, including rigid trucks of various capacities (7, 12 and 18 tons) and trailers; the majority beingunder 2.5 years old. This ongoing renewal ensures not only greater fuel efficiency, but also lower breakdown rates and a stronger brand image with customers, who, in the food sector particularly, value punctuality, safety, and compliance with health and hygiene regulations.

In addition to its headquarters in Llodio, where it maintains its own logistics warehouse with storage and order preparation capabilities, the company operates daily routes covering virtually the entire Iberian Peninsula, though its business model does not include international transport. Its focus is clear: last-mile distribution from logistics platforms to retail locations, especially supermarket and hypermarket chains.

## An increasingly complex sector environment

Like others in the industry, Barquín y Otxoa faces numerous structural challenges. The shortage of professional drivers is perhaps the most pressing. "It's becoming increasingly difficult to cover routes," Iñaki acknowledges. "Drivers now choose when to work, how to work, and of course, at what price." This situation has created strong upward pressure on labor costs.

Obtaining professional licenses remains complicated and expensive, creating barriers for new entrants to the market. Additionally, the social perception of driving as a profession, especially among young people, falls short of what is needed in a sector that demands qualifications, responsibility, and adaptability to irregular working hours.

In this scenario, Barquín y Otxoa has chosen to offer attractive and stable working conditions, with special attention to work-life balance. 90% of its routes allow drivers to sleep at home, and although the food sector requires weekend and holiday work, the company strives to maintain clear and predictable schedules. "We know that people value stability, and that is what helps us retain talent," Iñaki points out.

## Technology and efficiency serving the business

Efficiency is another pillar of Barquín y Otxoa's strategy. **From route management to predictive fleet maintenance, consumption control and process digitalization, the company has incorporated technology to maximize resources and reduce inefficiencies.**

In this journey, Eurowag has established itself as a valuable tactical partner. The collaboration began after the 2024 acquisition of a Madrid-based company that was already working with Eurowag. From that point, Barquín y Otxoa decided to maintain and even expand the use of the platform to cover refueling in areas outside the reach of its own station in Vitoria.

Eurowag currently accounts for approximately 6% of the company's monthly fuel consumption, equivalent to about 30,000 liters per month. While the majority of refueling still occurs at its own station, Barquín y Otxoa appreciates Eurowag's ability to identify stations with competitive prices, facilitate vehicle-specific expense tracking, and offer proactive support in route planning.

"It's a tool that we use selectively, but it provides us value," says Iñaki, "not only because of the direct savings, but also because it enables better decision-making when operating outside our usual area."

## Technological innovation: efficiency, control and digital transition

Although the return on certain technological investments isn't always immediate or visible to clients, Barquín y Otxoa maintains an active modernization policy. The company invests in new, efficient, and comfortable vehicles for drivers, but has also implemented solutions that improve control and daily operations.

These include the Webfleet system, installed on both tractors and semi-trailers, which allows real-time monitoring of fuel consumption, driving hours, driver availability, cargo temperature, and door openings. This technology, fully deployed between 2024 and 2025 after more than two years of testing process, has helped traffic teams make more secure and agile decisions.

"

**We appreciate Eurowag's ability to identify stations with competitive prices, facilitate vehicle-specific expense tracking, and offer proactive support in route planning. It enables better decision-making when operating outside our usual area.**

Additionally, the company has recently upgraded its ERP system, which will include a new application to improve communication with drivers. With this solution, load orders can be sent directly to drivers, while trip events and delivery notes are recorded and digitized in real time. While not yet an artificial intelligence-based tool, it represents a firm step toward process automation and document efficiency.

Barquín y Otxoa is one of the most technologically advanced mid-sized logistics firms on the Cantabrian coast, setting the standard for others in the region.

### Long-term vision: sustainability and consolidation

In an environment where the energy transition dominates discussions, Barquín y Otxoa maintains a realistic and pragmatic approach. Currently, fleet electrification isn't on their short-term roadmap, as their routes and operating conditions don't currently support it. However, they continuously work to improve their carbon footprint by renewing vehicles, using consumption control technologies, and optimizing routes to reduce unnecessary mileage and emissions.

Barquín y Otxoa represents a generation of medium-sized companies in Spanish transport that have adapted to market changes without losing their essence. With professional management, an efficient structure, and a clear understanding of their role within the supply chain, they have built a solid and respected position, even during uncertain times.

For Eurowag, working with companies like Barquín y Otxoa provides an opportunity to deliver real value where it's most needed: in efficient management, cost visibility, and strategic guidance. For the sector as a whole, this case demonstrates that specialization, efficiency, and care for the human team remain key to competing effectively, even in today's challenging market.



Company name:

**Grupo logistico Barquín y Otxoa S. L.**

Year of foundation:

**1998**

Fleet size:

**257**

Usage of Eurowag products by type:

Fuels

Revenue 2024:

**€40m**

Number of employees:

**400**

Founder/CEO:

**Ricardo Barquin Redruello**

Geographical scope:

**Spain**

# Sustainability Star

Company: GEXA TRUCK SERVICE S. L.
Country: Spain


# Social Commitment and Sustainable Transition in International Transport

In a highly competitive and pressured sector like road transport—where cost pressures, regulatory uncertainty, and the energy transition shape the agenda—GEXA TRUCK SERVICE, S.L. has managed to establish itself as a benchmark for adaptation and commitment. Founded in 1982 and based in the Basque Country, the company has evolved from a small cooperative into a limited company with over 65 employees and a fleet of 105 vehicles.

Its CEO, Iñaki Gangoso Álvarez, summarizes it in one word: adaptation. "In 43 years, we have diversified our offerings, abandoned less profitable business lines, and constantly adjusted to customer demand, regulations, and new market realities."

## Stable Growth with an Efficiency Focus

The first half of 2025 confirms this trajectory: GEXA has grown in volume and revenue by nearly 7.5% compared to the same period last year. Although margins remain tight, especially in international transport, the company maintains a clear strategy of operational efficiency and cost control, relying on tools like Eurowag to optimize refueling on international routes.

## Transport with a Sustainable Approach

Sustainability—both environmental and social—has become a cross-cutting priority. GEXA implements concrete energy efficiency measures, monitors fleet consumption, and has incorporated alternative fuels like HVO100, which already account for around 5% of its fuel use. "It's a simple alternative, compatible with our engines, that reduces the environmental footprint without altering refueling operations," explains Iñaki Gangoso.

In addition, the company incentivizes drivers for efficient driving by analyzing truck data month by month and offering achievable financial rewards. This not only contributes to fuel savings but also fosters a culture of responsible driving.

On the social side, GEXA promotes active work-life balance policies. Organizing alternating weekend shifts, planning routes closer to drivers' homes, and supporting more balanced working hours reflect a clear commitment to employee well-being. "If our team is happy, the service will be better. Sustainability also starts on the social side," emphasizes the CEO.

## Challenges and Prospects Towards Decarbonization

The company acknowledges that significant barriers to decarbonization still exist, mainly the high cost of alternatives and the lack of infrastructure. **"We need European corridors and strategic points, where alternative fuels can be refueled easily and without logistical detours. Only then will it be feasible to scale these solutions widely."**

In this regard, GEXA positively values Eurowag's role as a strategic partner, both in cost optimization and access to alternative fuels at key points. "The future will come hand in hand with technologies like artificial intelligence, and the sum of professional experience, which will allow us to optimize performance. We will be ready to adopt anything that adds real value, always balanced with sector profitability."

## A Company Looking to the Future

With a diversified client portfolio in sectors such as steel and metal, automotive, construction, consumer goods, agricultural bulk goods and fuels, and operations covering Western Europe and the Iberian Peninsula, GEXA combines tradition and modernity in a continuous transformation process.

"First, profitability must be improved, and then innovation pursued without losing sight of market realities. That is the great challenge of our sector," concludes Iñaki Gangoso.

Company name:

**GEXA TRUCK SERVICE, S.L.**

Year of foundation:

**1982**

Fleet size:

**45** tractors

**60** trailers

Revenue 2024:

**€8.3m**

Number of employees:

**65**

Usage of Eurowag products by type:

Diesel

AdBlue

Washes

HVO

Founder/CEO:

**Joseba Iñaki Gangoso Álvarez**

Geographical scope:

**Western Europe and Iberia**

# Romania

# Romania: Market overview and outlook

After years marked by economic uncertainty and external challenges, the Romanian market is entering a more mature stage where innovation, digitalization, and sustainability are no longer optional — they are priorities.

As we continue the year, the GDP for 2025 is expected to grow by 1.4% to 2.8%, supported by EU-funded infrastructure projects, the positive impact of Romania's Schengen accession, and a growing appetite for modern solutions. The removal of border controls for road transport has already boosted the flow of goods and mobility across Europe, strengthening Romania's role as a strategic hub in regional logistics. At the same time, businesses are adapting to challenges such as higher VAT and excise duties on fuel, which are adding pressure on operational costs. While inflation remains above 5%, we see gradual improvement, creating a more predictable environment for the transport sector.

In the fuel card and mobility services sector, the market continues to expand, surpassing $1.4 bn. The top three players — DKV, Shell, and Eurowag — hold about 58% of the market. Eurowag has strengthened its position within the top three, maintaining an estimated 14% market share, confirming its role as a trusted partner for transport and logistics companies.

Key trends shaping 2025 include the growing demand for greener solutions, the rise of telematics services and mobile apps that are transforming fleet cost management, and Schengen integration, which is increasing transport flows and overall efficiency. In parallel, VAT and excise duty changes are reshaping cost structures and fueling demand for smarter payment solutions, while customers are seeking more flexible and personalized services.

As we move toward 2026, the industry is expected to accelerate its transition toward alternative fuels (LNG, CNG, electric, hydrogen) and adopt even more advanced digital platforms for fleet optimization. EU sustainability targets and stricter emissions regulations will further influence investment decisions in the transport sector. Romania is poised to benefit from its strategic position within the EU logistics corridor, with Schengen integration continuing to fuel cross-border growth. For companies, the challenge will be balancing rising operational costs with the need to innovate and remain competitive.

Eurowag's vision for 2026 is to build on its strong market presence and expand its role as a driver of sustainable mobility, offering solutions that help transporters adapt to new fuels, digital ecosystems, and regulatory requirements while maintaining efficiency and profitability.

**Victor Ion**
Country Manager
for Romanian market

# New commercial vehicle registrations (Q1–Q3 2025)

| | Heavy commercial vehicles of 16 tonnes and over | Medium commercial vehicles between 3.5 and 16 tonnes | Total | YoY change (Q1–Q3 2024) |
|---|---|---|---|---|
| Poland | 19 686 | 2 009 | 21 695 | 3,4% |
| Spain | 17 533 | 3 394 | 20 927 | -7,9% |
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| Czechia | 6 570 | | 6 570 | -3,8% |
| Hungary | 3 470 | 237 | 3 707 | -12,2% |
| Portugal | 3 832 | 426 | 4 258 | -8,2% |
| Slovakia | 2 052 | 218 | 2 270 | -12,4% |

Heavy commercial vehicles of 16 tonnes and over

Medium commercial vehicles between 3.5 and 16 tonnes

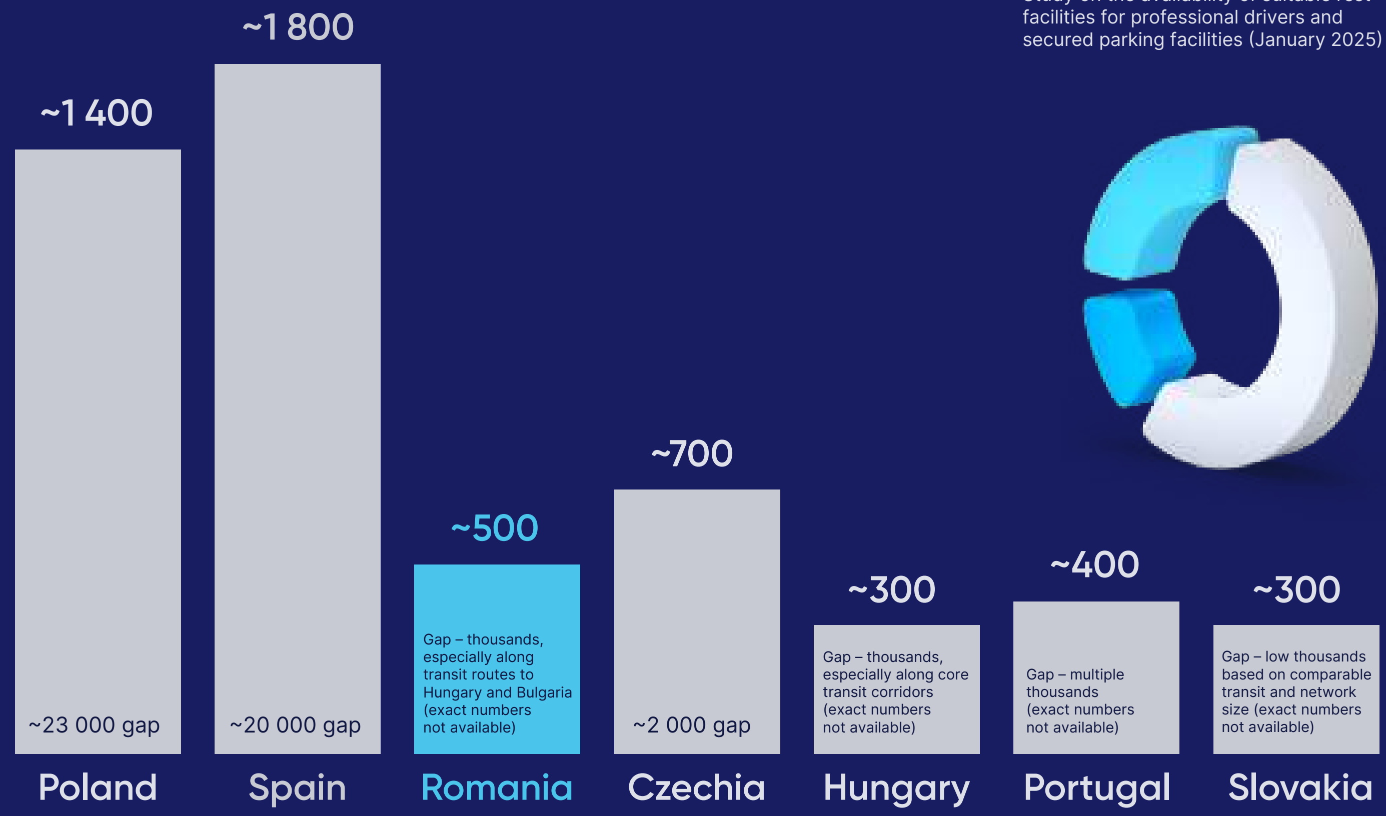
Source: ACEA

# Certified parking spots in 2025 in European Union

* in millions of tonne-kilometers

Sources:
Published overviews of available parking locations for trucks certified by EU SSTPA standard, ESPORG, and TAPA

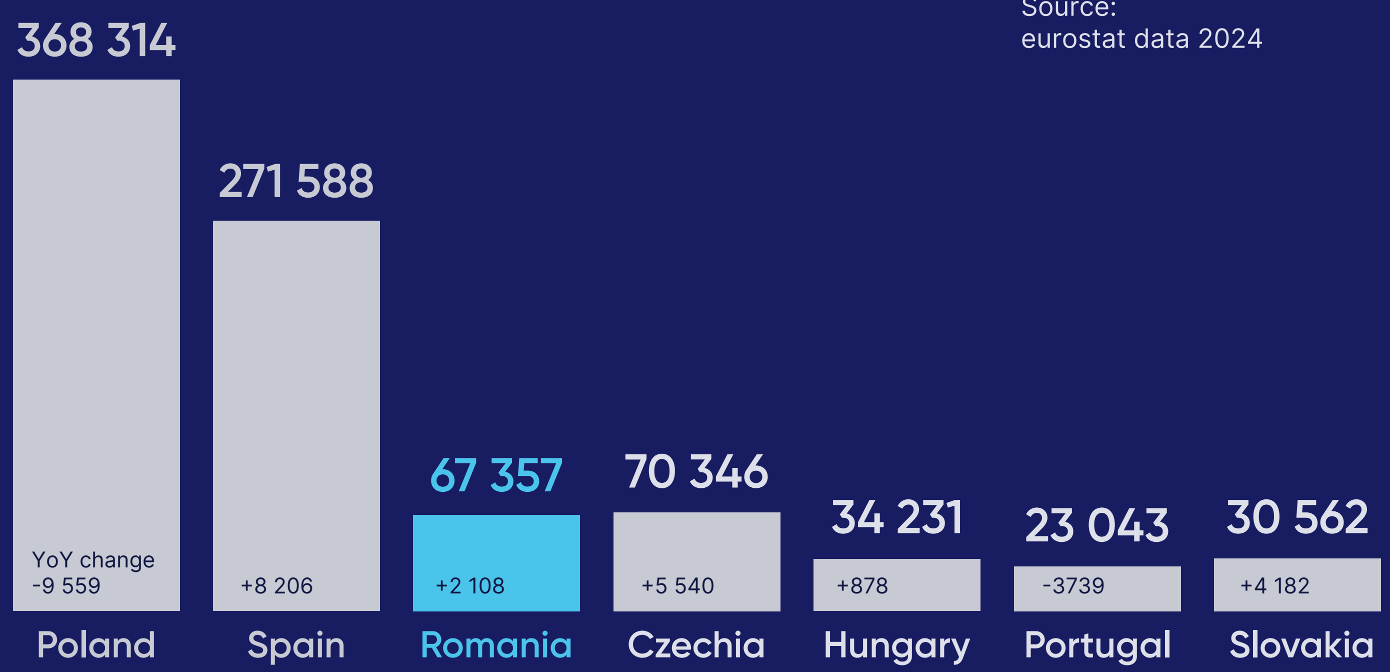
Study on the availability of suitable rest facilities for professional drivers and secured parking facilities (January 2025)




# Road freight volume in 2024*

* in millions of tonne-kilometers

Source:
eurostat data 2024




# Market players

Market Leader

**Bipmobile S. R. L.**

Tech Trailblazer

**MRS Transport S. R. L.**

Sustainability Star

**Altec Logistic S. R. L.**

# Market Leader

Company:
Bipmobile S. R. L.
Country: Romania

# Bipmobile: A story that moves hearts and goods

"I believed in our story, and in our power to prove we can do things differently. I believe in leadership and trust. I believe in our clients and partners", begins Adrian Minea, CEO and founder of Bipmobile, reflecting on the company' emotional journey throughout the years. Today, the company is a powerful transport leader in Romania indeed: operating 200 units and having more than 200 employees who diligently ensure that every day operations go exactly as planned. And this is just one of the ways Bipmobile stands out as a testimony of success through business vision and hard work.

# Financial and toll services provided by Eurowag have been critical in Bipmobile's development.

But every business, especially in transport industry, "is a journey on a... bumpy road," as Minea likes to joke. As the 2025 operational and fiscal year unfolds, Bipmobile found it a little more difficult than last year to gain traction on the spot market. Despite this, the market in Europe has somewhat stabilized, even at a very low level, with expectations for growth in more niche needs and new areas, such as the defense sector.

The management is now also focusing on the ever-changing tax environment in Romania, due to the newly elected government and its updated fiscal policy, including a significant VAT increase, from 19% to 21%. Having said that, **the company finds it difficult to compare the first half of 2024 and of 2025**, because the fiscal landscape has changed significantly.

## Eurowag: Key to Bipmobile's success

Financial and toll services provided by Eurowag have been critical in Bipmobile's development, says Adrian Minea, emphasizing "the significant partnership relationship with Eurowag as a key factor in our company's success". And success is a truly purposeful word when it comes to Bipmobile: it was recognized by the leading logistics magazine "Ziua Cargo" as the "Romanian Transport Company of 2024".

The company also received awards for "Best Management," "Popularity," and for the second consecutive year, the award for "Digitalization". But what makes Bipmobile so special?

Operating 200 trucks and trailers, the company's team concentrates on direct transport contracts or subcontractors who work exclusively for Bipmobile. With three active logistics centers operated by the company - two in Romania **(Timisoara and Bucharest)** and one in **Gyor**, Hungary – Bipmobile manages to offer an integrated package of services to any client in any industry. Nevertheless, approximately **30% of its transport is dedicated to the automotive sector**. The remaining volume is distributed across fast-moving consumer goods, e-commerce, electronics, general merchandise, and ADR (hazardous materials). One of the types of service Bipmobile specializes in is the so-called "time critical" shipments, delivered through a rigorous management process.

## Technology? Yes, please!

A lot can be said about how a company like Bipmobile thrived throughout the years, but Adrian Minea says that an important piece of the puzzle was technology and digitalization. "**In the last two years, the company implemented a new, high-performance GPS monitoring system.** Furthermore, Bipmobile developed its own fully automated ERP/TMS system called MARS", states Minea. Artificial Intelligence is no stranger to the company, either: the company actively utilizes AI tools for various purposes, including finding transport capacity, managing truck loadings, estimating arrival times (ETA), and optimizing routing. Management is continuously and proactively looking for new software and other technological tools which can improve the interoperability of various departments and increase operational efficiency.

Regarding the new European requirements of having a sustainable business, Bipmobile is following the industry trend. Neither having a dedicated sustainability coordinator, nor publishing an annual ESG or sustainability report, Bipmobile **is closely and continuously watching its operational impact and carbon footprint**. "This is achieved through continuous improvement of routes and operational management", details Minea. The company always measures the carbon footprint of its deliveries, being capable of providing this information to clients upon request at any time. Tracking "empty" kilometers to have a clear and quick response to any operational imbalance is another way of contributing to a more sustainable industry.

# We expect to see some significant transformation within the next decade, primarily driven by the digitalization of operational and managerial processes.

Having a "healthy" fleet is also part of the sustainability process, along with researching alternative fuels usage. **Bipmobile renews its fleet every five years and primarily uses traditional fuels (95%)**. "Low-emission fuels or zero-emission services are currently not highly relevant to our clients, and they do not seem willing to pay more for decarbonized transport yet. "The impact of EU regulations like AFIR, REDIII, Count Emission EU, and CSRD on investment decisions is currently very limited for Bipmobile, but I would say this can be translated to the whole market", says Minea.

## "No one can predict the future, but we can prepare for it"

Bipmobile doesn't hide the fact that it is one of the companies affected by the lack of drivers. If recruitment is affected, this has an impact on training and retention costs. Bipmobile addresses this by offering drivers a dynamic benefits package. But this doesn't shadow the overall optimism management has when asked about the future. "We do not anticipate fundamental changes in the transport industry, but we expect to see some significant transformation within the next decade, primarily driven by the digitalization of operational and managerial processes. We are ready for it", concludes Adrian Minea, CEO of Bipmobile.

Company name:

**Bipmobile S. R. L.**

Year of foundation:

**2002**

Fleet size:

**200**

Revenue 2024:

**~€20m**

Number of employees:

**200**

Usage of Eurowag products by type:

- Fuel cards
- Toll services
- VAT refund

Founder/CEO:

**Adrian Minea**

Geographical scope:

**European Union Romania**

# Tech Trailblazer

Company:
MRS Transport S. R. L.
Country: Romania


# MRS TRANSPORT: A powerful brand that started with just one van

MRS Transport

**"In 2011, I had one van. I wanted something "more", I had the ambition and will, but at the time I didn't dream of the company I run today," recalls Marius Răducanu, General Manager of MRS Transport.**


Today, the entrepreneurial vision and hands-on experience that began 14 years ago have turned a single van into a full-fledged international transport operator serving key sectors across Europe. The company now runs only heavy-duty trucks, focusing on long-haul routes and delivering stable, reliable services.

## Thinner profit margins require a strong mindset

"There are plenty of orders and plenty to do in this industry. If you have what it takes, your trucks can operate seamlessly," says Marius Răducanu — though he admits with a smile that he wishes it were that simple. "I had to change my mindset and become very pragmatic and results-oriented. If you asked me what has changed after 2024, I'd say it's the margins."

The company handled a high volume of orders in 2025, but profitability has been shrinking, with clients increasingly focused on price rather than performance. While the first half of 2025 brought no major fluctuations in volume compared to 2024, MRS Transport maintained solid operational activity. "We feel continuous pressure from rising costs and intense pricing competition," Răducanu adds. In this climate, MRS Transport is working to keep its fleet modern and, above all, to maintain a stable client portfolio.

While MRS Transport's drivers cover thousands of kilometres on the road, management has been navigating the fast-changing world of technology to keep operations running at their best. Since its founding, the company has consistently sought out new, high-performance tech solutions and software to stay competitive and in step with industry trends.

MRS Transport began in the courier segment in 2011, working with TCE and later Cargus. By 2017, the company had shifted to the freight sector, selling off its light commercial vehicles and investing in its first full-size trucks and trailers. Today, it operates a modern fleet of heavy-duty vehicles focused almost entirely on long-haul, full-truckload transport across Europe. Key industries served include food and beverage, energy, and textile and fashion, with a large share of loads consisting of food-grade starch shipments delivered regularly to countries such as Germany, Spain, Italy, the Netherlands, and Hungary, according to Răducanu.

## Practical tech adoption: from Eurowag tools to telematics

"We are always open to testing and implementing solutions that bring real value to the company. But we want to be sure these tools are worth keeping before going all-in," says MRS Transport CEO Marius Răducanu. "We currently use Eurowag's toll systems and remote tachograph downloads, as well as Inelo software and telematics for our vehicles driven abroad. These solutions support our compliance needs and save valuable operational time, especially for fleets driving outside Romania."

This pragmatic approach to technology reflects the company's overall philosophy: hands-on management paired with a flexible attitude towards change.

Today, MRS Transport's fleet includes modern trucks, with six new vehicles added in 2024. Older units — with mileages of up to 700,000 km — remain in active service thanks to their good condition. But with market uncertainty and shrinking margins, no major fleet investments are planned for the near future.

Electric trucks aren't yet on the roadmap, mainly due to high costs, limited charging infrastructure, and minimal customer demand. "In Romania, and even abroad, there's simply no real demand for zero-emission solutions yet. We had a single client who requested proof of HVO use, but that's rare," notes Răducanu. Alternative fuels like biodiesel and HVO are not in widespread use within MRS Transport's fleet, though the team continues to watch these developments closely.

Ultimately, Răducanu says the reasoning is simple: "Keeping the KPIs under control means better fuel efficiency and competitive pricing for clients."

## "At some point, we may be looking to hire drivers from abroad"

As for any other big company in the industry, recruiting and maintaining a constant workforce is a challenge – "at least for Romania", admits Răducanu sadly. "So far, all our drivers are Romanian, but recruitment pressures from abroad are mounting. I was actually contacted very recently by a recruiting company from Morocco. **While we are not yet employing foreign drivers, accessing international labor markets may soon become a necessity,**" he says.

Overall, the company's team prefers to keep things functional and fair — no excess, just trust and reliability, values that the CEO also wants to convey to their clients.

> "We currently use Eurowag's toll systems and remote tachograph downloads, as well as Inelo software and telematics for our vehicles driven abroad. These solutions save valuable operational time, especially for fleets driving outside Romania.

Company name:

**MRS Transport S. R. L.**

Year of foundation:

**2011**

Fleet size:

**34** tractors

**40** semi-trailers

Revenue 2024:

**€3.2m**

Number of employees:

**35**

Usage of Eurowag products by type:

Toll services

Digital platforms for analysis and reporting

EW TELEMATICS

Telematics

Founder/CEO:

**Marius Răducanu**

Geographical scope:

**European Union Romania**

# Sustainability Star

Company:
Altec Logistic S. R. L.
Country: Romania

# Altec Logistic: Any idea can become powerful if you believe in it

**Râmnicu Vâlcea, a mid-sized Romanian city of around 90,000 residents, might not be widely known internationally. However, it plays a key role as a transportation hub, linking the capital Bucharest and other major regions to Europe's main transport corridors – all within relatively equal distances.**

It is here where company founder and CEO Alexandru Olteanu established Altec Logistic back in 2004, having only a dream in mind: to become a key player in transportation industry. Almost a quarter of century later, his dream has came true. With nearly €11M turnover in 2024, Altec Logistic proudly stands out as a trusted logistics partner to many domestic and foreign clients. But the company's journey throughout the years was no easy endeavour, admits Olteanu: " It was a hard-to-play game, but I never wanted to quit or abandon the business. From the loneliness of a single thought, we have grown into a key partner and trusted transport services provider, especially for customers in the food and pharmaceutical industries."

For the first half of 2025, the company managed to maintain the same growth parameters. Altec Logistic recorded an increase in operational volumes, strengthened international partnerships, and achieved higher profit margins compared to the same period in 2024. Olteanu believes that the results are part of a broader trend that became evident last year, when the company saw a 41.7% rise in revenue and more than doubled its net profit compared to 2023.

Then, how can it all be explained? **"This progress is a direct result of digital transformation, route optimization, and improved fuel efficiency: an integrated perspective of our sustainability vision,"** Olteanu says. All of this translates into a company ready for the future, built with full sustainability in mind, especially in an industry that's more sensitive to change than most.

Since 2022, Altec Logistic has put sustainability and decarbonization into its core strategy. In 2023, a dedicated ESG coordinator was appointed to oversee environmental performance and energy efficiency initiatives.
"The company is currently preparing its first Sustainability Report, scheduled for publication in 2025, which will cover key indicators such as $CO_2$ emissions, fuel usage, and progress in adopting low-carbon solution", indicates Alexandru Olteanu, CEO of Altec Logistic.

## Testing renewable fuels: The first step towards decarbonization. Eurowag is here to help

Altec has begun testing renewable fuels such as HVO across parts of its fleet, noting comparable performance and fuel efficiency to conventional diesel, though the higher cost per liter still limits wider deployment. The company is also evaluating the integration of electric vehicles for short-distance and urban transport, with potential deployment starting in 2026 or 2027.

Despite its progress, the company has seen several challenges with decarbonization. Limited infrastructure for alternative fuels in Central and Eastern Europe, the high cost of low-emission vehicles, and the complexity of environmental regulations are among the barriers they and other companies face.

"Along all our processes, but especially in our decarbonization endeavour, we see Eurowag as a strategic partner in overcoming any difficulty. Our collaboration includes support with carbon footprint monitoring, route optimization, and digital tools that improve environmental performance. **We use advanced telematics and real-time monitoring systems, many of which are provided by Eurowag, to enhance fleet visibility and operational efficiency.** These systems allow for precise fuel consumption tracking, driver behavior monitoring, and automated ESG reporting. Thanks to these tools, our company has reduced idle time, lowered fuel costs, and improved the overall sustainability of its operations. Driver performance is continuously evaluated using telematics data, with monthly bonuses awarded for safe and efficient driving,", says Olteanu.


But **"sustainability is not possible without digitalization,"** added Olteanu. Therefore, digitalization plays a central role in Altec's operations, because management always has an eye on operational efficiency. The company tracks "empty' kilometers" and estimates that around 25% of its total mileage falls into this category. Altec is working to reduce that figure to under 20% by 2026 through better return load planning and network optimization. Why? Because "**environmental and sustainability criteria are becoming critical in bidding processes**, especially when it comes to multinational companies and large retailers," management states.

Furthermore, Alexandru Olteanu says "our clients are now regularly requesting emissions data, and the company is prepared to respond with reliable, digitally tracked metrics." Additionally, a stronger sustainability profile and improved operational landscape have helped Altec Logistic secure more favorable financing for fleet acquisitions. The company has used leasing and credit instruments to fund energy-efficient fleet upgrades. These are just a few of the reasons why they believe sustainability will soon make a significant difference in the market. "The road transport industry will soon face a growing divide between traditional operators and those aligned with ESG expectations," declares Olteanu. The company anticipates an acceleration in the adoption of alternative fuels, stricter

> "Along all our processes, but especially in our decarbonization endeavour, we see Eurowag as a strategic partner in overcoming any difficulty.

reporting requirements, and an increased emphasis on transparent, sustainable practices as prerequisites for accessing high-value contracts. Given this context, Altec Logistic's investment in clean technologies, training, and infrastructure follows clear business logic.

Altec advises other transport companies to begin their decarbonization journey with a clear analysis of fuel consumption and emissions. "From there, gradual steps such as digitalization, staff education, and partnerships with technology providers like Eurowag can make the transition both practical and impactful," concludes Alexandru Olteanu, CEO of Altec Logistic.

As of today, Altec Logistic operates a fleet of 65 refrigerated trucks, all compliant with Euro 6 emission standards, with an average vehicle age of three to six years. The company specializes in temperature-controlled transport for sensitive products such as meat, dairy, and perishable goods, while also handling general merchandise and fast-moving consumer goods. It focuses on serving strategic export markets including Spain, Germany, Italy, France, the Netherlands, and Belgium. In addition to transport, Altec offers a suite of logistics services such as cross-docking, short-term warehousing, and national distribution, making it a fully integrated partner for supply chain needs.

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**From there, gradual steps such as digitalization, staff education, and partnerships with technology providers like Eurowag can make the transition both practical and impactful.**

Company name:

**Altec Logistic S. R. L.**

Year of foundation:

**2004**

Fleet size:

**65**

Revenue 2024:

**€10.5m**

Number of employees:

**130**

Usage of Eurowag products by type:

- Telematics and fleet monitoring
- Fuel cards
- Toll
- Carbon footprint assistance
- Digital platforms for analysis and reporting

Founder/CEO:

**Alexandru Olteanu**

Geographical scope:

**European Union Romania**

# Czechia

# Czechia: Market overview and outlook

2024 exposed the vulnerabilities of the Czech and European road freight transport markets. Weak economic growth, high operating costs, and a severe driver shortage weighed heavily on the industry. Yet these same challenges have acted as catalysts for change, accelerating digitalization, reshaping logistics models, and forcing companies to consider sustainability more seriously.
The year 2025 stands as a turning point: survival depends on the ability to transform challenges into opportunities through innovation.

Despite sluggish GDP growth across the EU (1.0% in 2024), the road freight sector is projected to expand by 2% in 2025, reaching 436.9 billion EUR. For Czech hauliers, this cautious growth reflects both risk and opportunity. The pressure to reduce costs and optimize efficiency is greater than ever, but new digital and green technologies offer tools to offset stagnation.

Nearly half a million drivers were missing across the EU in late 2024, and the Czech transport sector has been hit just as hard. An ageing workforce and declining interest from younger generations continue to create a shortage of qualified drivers. To counterbalance this, transport companies are increasingly adopting digital solutions: Transport Management Systems (TMS) now automate scheduling and route planning, while telematics tools monitor driving behavior, reduce fatigue, and support safer working conditions. Combined with fleet modernization and broader digitalization, these innovations are gradually making the profession more attractive for newcomers.

At the same time, rising operating costs remain a constant burden. Tolls and fuel expenses.

Are the largest expenses, while many companies also face cash flow challenges due to delayed customer payments.

Here, technology again plays a crucial role: telematics and AI-driven systems help reduce unnecessary costs through predictive maintenance and real-time fuel monitoring. Load matching platforms and smart tachographs further optimize vehicle utilization, improve compliance and strengthen revenue streams.

Sustainability pressures add yet another layer of complexity. Customers and EU climate goals are pushing carriers toward greener logistics, yet electric or hydrogen trucks remain expensive and are limited by underdeveloped infrastructure. To bridge this gap, many companies have chosen a step-by-step approach involving the progressive adoption of Euro VI vehicles, hybrid or biofuel-powered alternatives, and eco-driving training supported by telematics. These measures allow the sector to move closer to climate targets while preparing for the eventual transition to zero-emission fleets.

- Czech CRT enters 2025 under pressure, but not without tools for renewal. The bridges between problems and solutions are increasingly clear:
- Driver shortages are pushing the automation of scheduling and digitalization of workflows.
- High operating costs are accelerating investment in telematics and AI-driven optimization.
- Regulatory demands are nudging hauliers to adopt smart tachographs and compliance tech.
- Sustainability requirements are stimulating a step-by-step fleet transformation toward greener technologies.

If Czech carriers succeed in exploiting these innovations, they will not only survive 2025, but also lay the foundations for long-term competitiveness in the European logistics landscape.

**Miroslav Novák**
Country Manager for
Slovak & Czech markets

## New commercial vehicle registrations (Q1–Q3 2025)

| | Heavy commercial vehicles of 16 tonnes and over | Medium commercial vehicles between 3.5 and 16 tonnes | Total | YoY change (Q1–Q3 2024) |
|---|---|---|---|---|
| Poland | 19 686 | 2 009 | 21 695 | 3,4% |
| Spain | 17 533 | 3 394 | 20 927 | -7,9% |
| Romania | 6 087 | | 6 087 | -4,9% |
| Czechia | 6 570 | | 6 570 | -3,8% |
| Hungary | 3 470 | 237 | 3 707 | -12,2% |
| Portugal | 3 832 | 426 | 4 258 | -8,2% |
| Slovakia | 2 052 | 218 | 2 270 | -12,4% |

Heavy commercial vehicles of 16 tonnes and over

Medium commercial vehicles between 3.5 and 16 tonnes

Source: ACEA

## Certified parking spots in 2025 in European Union

in millions of tonne-kilometers

Sources:
Published overviews of available parking locations for trucks certified by EU SSTPA standard, ESPORG, and TAPA

Study on the availability of suitable rest facilities for professional drivers and secured parking facilities (January 2025)

| Country | Certified parking spots | Gap |
|---|---|---|
| Poland | ~1 400 | ~23 000 gap |
| Spain | ~1 800 | ~20 000 gap |
| Romania | ~500 | Gap – thousands, especially along transit routes to Hungary and Bulgaria (exact numbers not available) |
| Czechia | ~700 | ~2 000 gap |
| Hungary | ~300 | Gap – thousands, especially along core transit corridors (exact numbers not available) |
| Portugal | ~400 | Gap – multiple thousands (exact numbers not available) |
| Slovakia | ~300 | Gap – low thousands based on comparable transit and network size (exact numbers not available) |

## Road freight volume in 2024*

* in millions of tonne-kilometers

Source:
eurostat data 2024

| Country | Volume | YoY change |
|---|---|---|
| Poland | 368 314 | -9 559 |
| Spain | 271 588 | +8 206 |
| Romania | 67 357 | +2 108 |
| Czechia | 70 346 | +5 540 |
| Hungary | 34 231 | +878 |
| Portugal | 23 043 | -3739 |
| Slovakia | 30 562 | +4 182 |

## Market players

**Market Leader**
**DIPLO Transport & Logistics, a. s.**

**Tech Trailblazer**
**Šmídl Holding, a. s.**

**Sustainability Star**
**Multitrans CZ, s. r. o.**

# Market Leader

Company:
DIPLO Transport & Logistics, a. s.
Country: Czechia


# DIPLO Transport & Logistics: Young carrier bets on broad service range and digital innovations

DIPLO
Transport & Logistics

*Diplomats at your service*

Transport & Logistics began with a modest fleet and a clear mission: to deliver reliable transport without complications. Today it has evolved into an established carrier with a professional dispatch team, robust customer portfolio, and well-defined operating model. "Our ambition isn't to be the largest, but to provide services that clients can genuinely rely upon," says Michal Bubeník, co-owner of the company.

This emphasis on simplicity, personal service, and strategic planning has established the company as a leading force in the Czech market. Through its partnership with Eurowag, Diplo effectively integrates daily operations with digital tools that enhance efficiency and support continued growth.

## From humble beginnings to European highways

Diplo grew out of a partnership between two founders, who decided to leverage their industry experience. The initial strategy was to begin with a small fleet and operate with maximum efficiency. This principle continues to guide the company today. While it now operates dozens of vehicles and serves international clients, the organizational structure remains streamlined, decision-making processes stay agile, and internal communication remains direct.

"Reckless expansion doesn't pay off in transport. We maintain an optimal size to preserve quality and operational control," explains Michal Bubeník. This approach enables rapid response to market changes, maintains strong customer relationships, and minimizes administrative overhead.

The timing proved particularly influential as the company launched during a period when other carriers faced significant uncertainty. "We established our business during COVID and chose to move counter to market trends. While others were contracting, we focused on developing solutions and maintaining growth," Bubeník recalls from five years ago. Rather than relying on government support programs, the company opted to actively develop new routes and services. "We preferred to build our reputation through quality service delivery rather than depend on subsidies."

## Five years as the first major milestone

When David Vladyka, the second co-owner, looks back on how the company has evolved, he sees reaching five years in business as a crucial turning point. "Reaching the five-year milestone represents our first significant achievement. We are now focused on planning our next phase of expansion," he comments on the company's current position.

But success didn't happen by accident or luck. "We have dedicated our entire professional careers to preparing for independent business ownership. Upon launch, our industry expertise, established networks, and clear operational vision provided substantial advantages," Bubeník explains. "Naturally, this success required tremendous dedication. For the first five years, we were constantly present at the company, and we're grateful to our colleagues who gave their all."

The result is consistent growth that continues today. "We maintain a growth pace that we consider stable and sustainable," confirms Vladyka, noting that the company focuses on never declining while consistently expanding.

## Complete logistics chain under one roof

What sets Diplo apart from typical carriers is its ability to handle the entire logistics chain. "We manage the complete journey of goods from manufacturer to end customer. We'll pick up raw materials from the port, deliver them to the production facility, move finished products to distribution centres, and finally get them to the customer," describes Bubeník the company's comprehensive service philosophy.

The company handles maritime container transport from ports to Central Europe, manages container distribution from local terminals to clients, runs curtain-sided transport of beverages and various goods across Europe, and also specializes in oversized shipments. One standout project from the past two years is the company's swap body system for a major client where Diplo runs thirteen daily connections from Czech depots to neighbouring countries, delivering shipments within 24 hours.

The company operates two warehouses and provides comprehensive logistics and storage services. "We run our own warehouses in Eastern Bohemia and Prague, from which we handle deliveries using everything from vans to full-size trucks," adds Vladyka. Diplo also handles more complex cargo types, including dangerous goods, which requires special certifications and trained drivers.

"We aim to control the entire transport chain and to be proactive rather than reactive," summarizes Bubeník. "Whatever type of transport challenge comes up, we should have a solution ready."

## Efficiency and integrity as a form of sustainability

Diplo exemplifies a new breed of market leader, one that leads through innovation rather than sheer size. While traditional carriers often copy established practices, Diplo actively shapes the industry's future. **Many of the practices the company has adopted are now becoming industry standard, whether it's smart route planning, minimizing empty runs, transparent customer communication, or clearly defined partnership terms.**

People matter too, from dispatchers and drivers to subcontractors. The company builds long-term relationships with proven partners, keeping turnover low and creating a stable network.

"We don't go on hiring sprees. People who join us usually stick around. We try to create predictable, human working conditions rather than catching people off guard with constant changes," adds Bubeník.

The company's approach to attracting and keeping drivers has become a model for the industry. "**In our experience, there are plenty of skilled drivers in the market, and they stay where they find suitable working conditions.** From day one, we've been clear about how we want to treat our people, and that's why we don't really struggle with driver shortages."

Personal experience makes the difference. "I've been behind the wheel myself, so I understand what the job involves and what drivers need. We share that insight with our dispatchers," explains Vladyka. As a result, the company doesn't spend heavily on driver recruitment but relies on culture and communication instead. "It's the result of daily effort from our entire team to create an environment where drivers feel valued."

> **In our experience, there are plenty of skilled drivers in the market, and they stay where they find suitable working conditions.**

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## We provide carbon footprint calculations for individual client projects as part of their Scope 3 supply chain emissions reporting.


### Taking the lead on green solutions

While many transport companies approach decarbonization with scepticism or a wait-and-see attitude, Diplo has chosen a pioneering path that's becoming a blueprint for the industry. Last year it launched Diplo Green Line, the first dedicated green transport division in the Czech sector. **"We take solutions directly to clients rather than waiting for them to ask. This covers everything from decarbonization to carbon footprint calculations and broader sustainability planning,"** Bubeník describes an approach that larger competitors are now copying.

The strategy is about staying ahead of requirements. "We know that CSRD (Corporate Sustainability Reporting Directive) will eventually affect the major companies in our portfolio. And we want to be ready so our clients know they have a reliable green partner," Bubeník explains the strategic thinking behind Green Line.

The company has an in-house specialist for carbon footprint calculations who can determine $CO_2$ output per 100 kilometres and offer alternatives using different fuels. "We provide carbon footprint calculations for individual client projects as part of their Scope 3 supply chain emissions reportin," says Bubeník about the company's practical reporting approach.

Diplo's current alternative fuel portfolio includes one LNG tractor and four vehicles running HVO in daily operations. In September, the company also deployed three electric tractors for clients requiring low-emission transport.

"The mix of alternative fuels in our fleet isn't just our call. We offer these options to clients, and they decide based on their needs and budget," Bubeník explains Diplo's market-driven approach to green technology.

### Digital revolution in daily operations

The partnership with Eurowag came when Diplo needed to streamline several parallel processes. Moving to digital systems for trip reporting, invoicing, and driver management brought major simplification and saved time for both dispatchers and company leadership.

**"We eliminated three different spreadsheets and three different approaches. Everything's now unified in one interface that gives us real-time visibility,"** Vladyka describes the practical benefits of going digital.

Fuel and toll management represents a key area for savings. **"Fuel costs can hit 40 percent of our freight revenue, so any optimization here makes a real difference to our bottom line,"** Vladyka points out the importance of efficient cost control.

Eurowag helps the company optimize gas station usage to minimize detour kilometres and take advantage of competitive pricing through the Eurowag Prime network. The EVA toll unit has delivered significant savings. "With the EVA unit, we handle tolls across thirteen European countries through a single device, which really streamlines the paperwork," appreciates Vladyka. The company looks forward to Eurowag completing coverage in the remaining four countries so it can eliminate its last standalone toll unit and achieve full integration.

## Technology transformation across the company

Diplo doesn't stop at traditional optimizations. The carrier systematically implements cutting-edge technology to become an industry tech leader. "This year we rolled out a new ERP system and completely redesigned our company workflow," Bubeník describes an extensive digital transformation that puts them years ahead of most Czech carriers.

The changes include AI-powered document processing, gradual elimination of paper documents, and a comprehensive automation initiative. **"We have a long-term automation project that we're implementing step by step as technologies mature and become cost-effective,"** Bubeník explains Diplo's measured modernization strategy.

Vehicle communication receives particular attention. "We're implementing two-way communication with our trucks. It's not just about sending assignments. We get feedback on job status, driver conditions, and vehicle performance," Bubeník describes a system that provides centralized oversight of entire operations.

## Young fleet with regular renewals

Diplo currently operates approximately 80 vehicles, including tractors and smaller trucks. Average vehicle age stays around two to three years thanks to an active fleet renewal. "Our fleet gets refreshed every year as part of our growth strategy," explains Vladyka.

The company uses a cascade allocation system. "New drivers start with older vehicles, while experienced drivers move up to the newest equipment. In practice, this means drivers can expect a newer vehicle every couple of years," Vladyka describes the fair allocation approach.

The strategic goal is operating vehicles for no more than five to six years. **"We run vehicles for five to six years tops, which keeps our average fleet age around three years,"** says Vladyka, defining a long-term renewal vision.

## Flexibility over specialization

Unlike many carriers who focus on specific cargo types, Diplo has chosen maximum flexibility. "We haven't found any type of cargo we'd refuse," says Bubeník, emphasizing adaptability.

"We want customers to come to us with any challenge, knowing we'll find a solution. Service diversification is crucial to us because it means our customers don't have to shop around for multiple suppliers," explains Bubeník.

One hallmark of market leaders is setting new industry standards rather than following competitors. "Our rapid growth and service diversification means we operate across so many segments that we don't have one specific competitor to measure against," Vladyka explains the company's position in creating its own market categories.

"Of course, we know who we're up against in various tenders, but we cover so many areas that our competitive landscape constantly shifts depending on the project type," he continues.

This diversification allows the company focus on its own strategy. "We stick to approaches we believe in and find interesting. Rather than watching competitors, we focus on our own innovations and pathways," says Vladyka, noting that competitor-watching could lead to copying rather than innovating.

## Quality over quantity

Diplo acknowledges achieving only single-digit profit margins, but this aligns with its sustainable growth philosophy. "We prioritize long-term investments in systems, people, and fleet over short-term profits," Vladyka explains the business approach.

The company deliberately doesn't chase every available contract. Instead the team carefully selects projects they can execute well. "Growing our vehicle count matters less than maintaining the service quality we've promised," Vladyka the company's selective growth strategy. This approach extends to customer relationships. The company would rather decline a job than risk compromising service standards.

Controlling the pace of growth forms another key strategic element. The company constantly monitors to ensure steady expansion without jeopardizing operational stability. "We focus on steady growth. It may be single-digit but always in a controlled way," Vladyka describes the carrier's approach that's inspiring others.

## AI as a change catalyst

When Bubeník reflects on the industry's future, he doesn't see traditional business cycles but rather technological revolution, once again demonstrating the direction modern logistics is taking. "I see 2025 as a breakthrough year for artificial intelligence adoption and new process implementation," he predicts fundamental changes that Diplo is actively testing and implementing ahead of the pack.

> "The partnership with Eurowag came when we needed to streamline several parallel processes. Moving to digital systems brought major simplification and saved time for both dispatchers and company leadership.

"I expect major shifts in the job market. Some roles will disappear, others will emerge and overall, part of the workforce will be freed up," he analyses the impact of automation. "Virtually every software today uses AI that replaces some human task."

Regarding geopolitical influences, the company stays realistic. "Global trends like the US-China trade war are unpredictable, and while we can't forecast their exact impact on our business, we know we'll all feel the effects," says Vladyka about international uncertainties.

But Diplo remains optimistic. "Our approach hasn't changed and continues to be the same as when we started five years ago. Instead of waiting for perfect conditions, we adapt to circumstances and find opportunities where others see obstacles," concludes Vladyka, confident in the company's adaptability.

## The future? Steady growth, not chaos

Diplo has built a position from which it can confidently plan continued development. The combination of modern technology, experienced team, and clear strategy creates a solid foundation for expansion. The company has systems ready for growth without sacrificing quality or reliability.

Combined with smart use of digital support, a committed workforce, and open customer communication, Diplo embodies what defines the Market Leader category. It's a company that shows the industry how to build sustainable business without unnecessary chaos and with clear future vision.

> **With the EVA unit, we handle tolls across thirteen European countries through a single device, which really streamlines the paperwork.**

Company name:

**DIPLO Transport & Logistics, a. s.**

Year of foundation:

**2019**

Fleet size:

**80** vehicles

**70** trailers

Usage of Eurowag products by type:

- Fuel cards
- EVA
- GPS Monitoring
- HVO

Turnover 2024:

**€11.18m**

Number of employees:

**130**

Founder/CEO:

**Michal Bubeník, David Vladyka**

Geographical scope:

**Czechia European Union**

# Tech Trailblazer

Company:
Šmídl Holding, a. s.
Country: Czechia


# Šmídl Holding: Thirty-five years of growth through connecting technology and people

From modest beginnings as a conventional road haulier, Šmídl Holding has grown over 35 years into one of the largest purely Czech transport companies with a fleet of 600 vehicles and annual revenues of €109.55m. The key to success isn't just size, but the systematic deployment of cutting-edge technology.

The company implements this tactic across all processes, from telematics and artificial intelligence to comprehensive administrative automation. "We see technology as an integral part of running the business, not just a support tool," explains Martina Šmídlová, chairwoman of the board of Šmídl Holding a. s.

This approach makes Šmídl Holding a true tech trailblazer, a company that views digital solutions as a means rather than an end, and effectively uses them to achieve strategic goals. Combined with its skilled workforce of 850 employees and a long-term partnership with Eurowag, Šmídl Holding represents an exemplary case of how a Czech family business can compete with multinational corporations through the smart use of innovation.

## "Eurowag helps the company not only with unified toll management, but also with the optimization of fuel purchasing through its vast network of fuel stations.

### From a small trucking company to tech pioneer

When Vladimír Šmídl decided to establish his own transport company in 1990, he could hardly have predicted that it would one day grow into a holding company with 600 motor vehicles operating across Europe. "Over 35 years, we've evolved from a conventional road haulier into a transport and logistics company," says Martina Šmídlová, the founder's daughter and current chairwoman of the holding's board.

The journey to becoming a technology pioneer wasn't accidental. In the early years, the company understood that without modern tools, it wouldn't be possible to efficiently manage a growing fleet and increasingly complex contracts. The first revolutionary change was implementing a telematics system, which brought digital trip recording, online data, advanced planning, and controlling.

**"The telematics system was a game-changer for us. Suddenly we had oversight of what was happening with our vehicles in real time, we could better plan routes, control costs, and ensure delivery deadlines were met,"** explains Martina Šmídlová the significance of this investment, which put the company years ahead of most competitors.

Another important milestone was the opening of a logistics centre in Vysoké Mýto, which enabled the company to expand its service portfolio and acquire new clients. This was followed by the acquisition of NIKA Logistics, which brought not only service expansion into domestic transport, mechanization, and oversized shipments, but also two additional logistics centres. The latest significant step was the opening of the company's own modern service facility in Hrochův Týnec, which provides greater flexibility and control over maintenance of an extensive vehicle fleet.


Today the company offers a comprehensive spectrum of services from domestic and international transport to specialized logistics solutions across three logistics centres in Pardubice, Liberec, and Vysoké Mýto. The company specializes particularly in oversized transport, as well as the automotive, paper, packaging, and construction industries. The service portfolio is completed by construction materials transport and heavy machinery services using excavators, tippers, and crushers. Through this diversification, Šmídl Holding can cover a wide spectrum of customers' transport and logistics needs.

### Building a digital ecosystem

What distinguishes Šmídl Holding from its competitors today is its systematic approach to technology implementation. These aren't isolated projects, but a connected ecosystem of solutions that complement and reinforce each other.

In the transport and logistics area, the company deploys modern software systems for telematics and vehicle tracking, which enable better planning, reduce empty runs, and provide faster response to changes. All vehicles are connected to the telematics system, from which management receives current information about vehicle operation, fuel consumption, and driver performance.

"We use artificial intelligence for navigation and route optimization. Thanks to the telematics system, we can monitor each driver's driving style and help them improve their technique to reduce fuel consumption and accident risk," Šmídlová describes the specific benefits of technology investments.

In the administrative part of the company, extensive process digitalization is underway. The company automates repetitive tasks through MS Power Automate, which has significantly reduced error rates and the time needed to process incoming invoices. Additionally, the company connects its various computer programs, so they automatically exchange information. This includes systems for contract and financial management (ERP), databases for managing scanned contracts, delivery notes and invoices (DMS), and vehicle telematics. As a result, employees don't need to re-enter the same data multiple times into different programs. The outcome is faster information flow and more accurate reporting.

### Artificial intelligence becomes second nature

While many transport companies approach artificial intelligence cautiously or experimentally, Šmídl Holding sees it as a natural component of almost everything it does. "We don't limit ourselves to individual applications. AI enters across our company into multiple processes, decision-making, and daily operations," Šmídlová explains, demonstrating the company's advanced approach to modern technologies.

The practical application of artificial intelligence is impressive in its scope. The company uses it for automatic extraction of data from invoices and documents as well as their subsequent sorting and administrative processing, for customer communication content generation, and for management briefing documents creation. AI helps analyse large volumes of data, accelerate decision-making processes, and eliminate repetitive activities.

AI tools are playing an increasingly important role in the controlling, HR, sales, marketing, and operational transport and logistics departments. The company uses artificial intelligence where it brings tangible benefits, from automating routine tasks to advanced data analytics.

"We embrace technology proactively. We don't wait for the market to adapt to us but actively adapt to technological possibilities while simultaneously influencing their direction," says Šmídlová, describing the company's approach to innovation.

## Digitalization with measurable results

The results of technology investments aren't just theoretical but manifest in hard numbers. Through the use of a DMS system, the connection of all internal systems, integration with customer systems, the automation of controls, and the use of artificial intelligence tools, the company has reduced error rates in routine processes by tens of percent.

"We've saved thousands of hours of work annually, which our employees can dedicate to higher value-added activities," Šmídlová explains, quantifying the impacts of automation. Financial benefits include not only savings on wage costs, but also faster contract processing, which positively impacts both cash flow and customer satisfaction.

An important area of digitalization is EDI communication, meaning the automatic exchange of data between Šmídl Holding's computer systems and those of key customers, which helps increase efficiency and accuracy in transferring orders, dispatch data, vehicle locations, invoicing, and key metrics. This type of integration represents the future of B2B communication in transport and logistics, and Šmídl Holding is among the pioneers of these solutions in the Czech Republic.

In the past two years, the company has deployed several key technologies including modern systems for the optimization of delivery routes, warehouse management systems, and advanced administrative automation tools. The primary goal of implementing these technologies is reduction of operational costs, the acceleration of decision-making processes, and the improvement of service quality for customers.

## Partnership that drives innovation

A key partner in the company's technology transformation is Eurowag, whose solutions help Šmídl Holding optimize some of the most expensive items in transport. The cooperation began with an investment in EVA on-board units, which enable unified toll payment in most EU countries and reduce the administrative burden across the entire company.

**"Thanks to this solution, we pay tolls in thirteen European countries through a single device, which significantly simplifies administration,"** Šmídlová says, appreciating the practical advantage of eliminating the need to use different toll systems in different countries.

Besides the toll system, the company also uses the PerfectDrive service, which enables comprehensive monitoring of driver performance. **"PerfectDrive provides us with comprehensive information about driver performance. This means, we can target each driver's weak points and through targeted training save fuel consumption,"** Šmídlová explains. The system simultaneously reduces accident risk by encouraging smoother driving habits.

> **"**
>
> **Thanks to integrating data from Eurowag into our internal systems, we can analyse not only fuel consumption by individual drivers, but also strategically select fuel stations according to our vehicle routes.**


> **"**
>
> **The system identifies the most efficient combinations of routes and fuel stations, which ultimately reduces both operational costs and the environmental impact of transport.**

Fuel costs represent a significant budget line for every carrier, so savings in this area have a direct impact on competitiveness. **Eurowag helps the company not only with unified toll management but also with the optimization of fuel purchasing through its network of fuel stations.**

However, cooperation with Eurowag goes beyond mere toll and fuel management. The company also uses advanced analytical tools that Eurowag provides for the detailed evaluation of fleet efficiency. **"Thanks to integrating data from Eurowag into our internal systems, we can analyse not only fuel consumption by individual drivers, but also strategically select fuel stations according to our vehicle routes,"** Šmídlová explains, describing another dimension of the partnership. **The system enables the identification of the most efficient combinations of routes and fuel stations, which ultimately reduces both operational costs and the environmental impact of transport. This combination of technological solutions represents an exemplary case of how strategic partnership can bring measurable results in daily operations.**

## Green fleet as a competitive edge

Šmídl Holding operates 600 motor vehicles, of which 550 are owned and 50 are contracted. It has curtain-sided, box, and telescopic trailers and swap bodies available. It also operates special equipment (8×4, 6×6, 6×4, 6×2) and machinery such as bulldozers, crushers, sorters, excavators, and wheel loaders.

The average age of a fleet vehicle is three years, thanks to regular renewal. "We've always replaced vehicles for international transport after four years, and in 2025 we extended this system to vehicles operating only in the Czech Republic. This is how we actively reduce $CO_2$," Šmídlová explains, describing a strategy that combines operational efficiency with environmental responsibility.

In 2025, the company is investing over 200 million CZK in new generation equipment with lower fuel consumption that meets the latest emission standards. The company actively monitors the impacts of European regulations such as AFIR, REDIII, or CSRD, and considers them when planning fleet renewal.

# For us, decarbonization is both an environmental and a business priority, because we know that pressure to reduce emissions will only grow in the coming years both from legislation and customers.


When selecting new vehicles, the company considers in the $CO_2$ class, which comprehensively evaluates in one indicator all the measures that manufacturers implement to reduce emission standards.

"We recognize that early preparation will enable us not only to meet future obligations but also maintain competitiveness in a market where environmental standards will play an increasingly important role," Šmídlová explains, outlining the company's strategic thinking.

The company is also implementing alternative fuels. It operates an LNG vehicle and is prepared to use HVO alternative fuel in cooperation with customers. **"We're now preparing options for clients who target $CO_2$ reduction. We offer the possibility of using HVO fuel for international transport or electric trucks for shorter routes,"** says Šmídlová about concrete steps toward decarbonization.

## Making emissions measurement real

In terms of sustainability, the company doesn't just accept general commitments but works with concrete data. For 2023 and 2024, it calculated the carbon footprint through the GreenOmeter company for both NIKA Logistics a. s. and Šmídl s. r. o. according to customer requirements.

"Currently our controlling department is working on creating a calculator that will be able to work out the carbon footprint from ongoing data for each vehicle," Šmídlová explains, describing the development of the company's own tool for real-time emissions monitoring, which represents another step in the company's technological evolution.

The company regularly evaluates kilometres driven without load, which is a crucial parameter in transport affecting overall efficiency and profitability. This tracking also forms the basis of the $CO_2$ reduction strategy, because minimizing empty runs has a direct impact on total emissions.

Reporting and evaluation take place within controlling with an emphasis on the influence of vehicle brand, route and transport tonnage, driver influence, and driving style on $CO_2$ production. The company's commitment to sustainability is also confirmed by its registration on the EcoVadis platform, where it achieved a score above 50 points, ranking it among responsible companies. This evaluation is already required by many customers as part of tender processes.

## The long road to zero emissions

Šmídl Holding perceives decarbonization as a long-term process requiring a combination of technical, operational, and investment steps. In the short term, the company focuses primarily on the regular renewal of the fleet, with modern vehicles meeting the strictest emission standards and with lower $CO_2$ production.

"In the long term, we will monitor technology development in eTrucks and other zero-emission solutions. We're prepared to adopt these when they become operationally and economically viable for our types of transport," Šmídlová explains, outlining the company's pragmatic approach.

The company coordinates all these steps and creates a comprehensive system that simultaneously reduces costs and environmental impact. **"For us, decarbonization is not only an environmental but also a business priority, because we know that pressure to reduce emissions will only grow in the coming years both from legislation and customers,"** adds Šmídlová.

## Finding drivers in a digital age

According to Šmídl Holding's experience, the driver shortage in the industry directly affects costs associated with recruitment processes, training, and retaining existing employees. The company therefore invests in marketing campaigns aimed at reaching new drivers, in professional training and quality onboarding, and in further employee development, benefits, and social events for their families.

"Technology helps us in this area primarily in marketing and recruitment. We use it across targeted online campaigns, efficient CV processing and in communication with candidates," Šmídlová explains, describing the use of digital tools in HR.

Nevertheless, the company emphasizes a personal approach, believing that the human factor remains decisive in recruiting and retaining quality drivers. The combination of technological efficiency with a human approach represents an exemplary case of how a tech trailblazer can use innovation without losing the personal dimension of business.

## Industry future through tech trailblazer eyes

When Martina Šmídlová reflects on road transport development in 2025, she doesn't see dramatic changes. "By year-end, we don't expect significant changes from the external environment. Rather, **we expect a continuation of existing trends such as pressure on efficiency, the improvement of service quality, increasing process digitalization, and the gradual adoption of alternative fuels where it makes economic sense,**" she summarizes her expectations.

The company prepares for the future not only through technology investments but also by systematically building competencies, and a culture that enables the efficient use of innovation. The key is to connect technological sophistication with a deep understanding of customer needs and the ability to quickly adapt to changing conditions.

## Technology as company DNA

Šmídl Holding demonstrates how a thoughtful integration of technology across an entire company can create competitive advantage. Instead of merely adding individual digital tools, the company builds a system where all parts function as one whole and mutually reinforce each other.

This solid technological foundation enables the company to utilize cutting-edge tools, like artificial intelligence, the moment they become available. While competitors often deal with basic digitalization, Šmídl Holding can already experiment with more advanced solutions.

"For us, technology isn't an add-on, but a fundamental way of operating. That's why we can quickly respond to new opportunities and take advantage of them before others," Šmídlová summarizes, explaining the philosophy that turned a family business into a technology pioneer in the Czech transport industry.

As the largest purely Czech carrier by number of vehicles, the company maintains a strong position not just because of its size, but primarily because of its ability to combine cutting-edge technology with a personal approach to customers and employees.

"

**We're now preparing options for clients who target $CO_2$ reduction. We offer the possibility of using HVO fuel for international transport or electric trucks for shorter routes.**



Company name:

**Šmídl Holding, a. s.**

Year of foundation:

**1990**

Fleet size:

**550** owned

**50** contracted vehicles

Revenue 2024:

**€9.77m**

Number of employees:

**850**

Usage of Eurowag products by type:

- EVA
- PerfectDrive
- Fuel cards
- Fuel cost optimisation

Founder/CEO:

**Vladimír Šmídl / Pavel Prostředník**

Geographical scope:

**European Union**
**Switzerland**
**Turkey**

# Sustainability Star

Company:
Multitrans CZ, s. r. o.
Country: Czechia


# Multitrans CZ: Specialist in complex shipments shows the path to practical sustainability

Sustainability is widely discussed in the commercial road transport industry, but it rarely drives actual business decisions. The Czech company Multitrans CZ stands as an exception, having long established itself as a stable, reliable, yet quietly innovative market player. With annual revenues of 380 million CZK and 80 employees, the company led by Managing Director Ing. Bohuslav Bulíček and Operations Director Jiří Zelinger builds on fairness, efficiency, and responsible business practices. This approach helps the company thrive even during rapid changes and growing demands for sustainable operations.

“We've never called ourselves an environmental company,” says Jiří Zelinger with a smile. “But when you look at how we operate, you'll find we do many things sustainably naturally, because it simply makes sense.” This is what makes Multitrans CZ a true sustainability star, a company that doesn't follow trends, but is guided by common sense and long-term perspective.

## Twenty years of experience within one company

Jiří Zelinger has been with Multitrans CZ from the very beginning. In 2000, he became the first employee of the then-startup company and gradually went through all phases of its development until 2023. After two years working at a competitor, he returned this year, bringing valuable experience from a different environment.

"I saw the development of Multitrans from the start," says Zelinger. "I was also a co-owner of a subsidiary company that later merged with Multitrans through acquisition, so I have a comprehensive view of how the company grew and gradually realized the importance of sustainable business."

Over more than two decades, the company has established itself as a specialist in demanding shipments that other companies often refuse. Instead of chasing quantity, Multitrans CZ chose quality and efficiency. Today the company operates its own fleet of 22 vehicles, supplemented by an extensive network of freight forwarding partners. This model enables flexible responses to customer requirements while maintaining control over service quality.

"From the beginning, we knew we didn't want to be another company with hundreds of trucks. Sustainability for us starts with the business model. We prefer owning a smaller fleet, but with perfectly managed service and driver training," explains Zelinger. This philosophy paid off, especially during COVID fluctuations and rising operating costs.

## Complex shipments as a competitive advantage

Multitrans CZ specializes in transport requiring above-standard care such as: demanding shipments, sensitive goods, problematic locations, or time-critical deliveries. This specialization represents one of the pillars of sustainable business. Rather than handling routine shipments, the company focuses on projects where it can make a meaningful impact.

The approach to sustainability manifests in daily decisions. For example, the company changes tires based precisely on condition, not predetermined intervals. When purchasing equipment or vehicles, it doesn't just look at acquisition cost, but also long-term operational impact and total lifecycle costs.


"We refuse to waste time, money, or resources. It may not sound like a grand strategy, but ultimately, it's the most effective one," adds Zelinger, emphasizing that sustainability for Multitrans isn't a marketing tool, but a logical way of doing business.

The company takes a fair approach to both business partners and employees. Instead of relationships based on tenders with pressure for the lowest price, it builds partnerships on trust, quality, and reliability. Many clients work with Multitrans CZ long-term, precisely because they know what to expect even in stressful situations. As a result, Multitrans CZ creates sustainable business relationships that benefit all parties involved.

## Technology with clear purpose

How Multitrans CZ uses technology perfectly illustrates what makes a sustainability star. The company doesn't adopt technology for show; it systematically implements solutions that reduce waste and increase efficiency.

Route optimization has undergone significant development in recent years. "Route planning is already quite an old thing, but increasingly modern technologies are now available," explains Zelinger. In 2018, Multitrans switched to Helios software, which integrates map backgrounds connected to Google Maps. Dispatchers and controllers can now optimize routes while processing orders and minimize unnecessary mileage.

The system saves extracted route points to a database and automatically calculates both distances and time requirements. "When our dispatchers have an order in the system, they can plan the route just like using navigation. The points are saved, and the system calculates optimal parameters," explains Zelinger. This practical application directly impacts emissions and fuel consumption reduction.

Currently, the company is integrating these systems with web dispatch so that drivers can use in-vehicle terminals to follow planned routes efficiently. The goal is to systematically evaluate and minimize deviations from optimal routes. "Deviations will naturally occur, whether due to traffic jams, driver rest, or refuelling. But we want better control over how efficiently our trips run," says Zelinger.

## Advanced driver performance evaluation

One of the most advanced sustainability tools Multitrans CZ uses is the comprehensive driver evaluation system. The company tracks detailed data on every transport, from braking parameters through consumption to speed limit compliance. The system evaluates eight to ten driving parameters and the resulting driver grade for the entire month influences their compensation.

"The system records when the driver stopped, what RPM they had, what consumption, how many times they braked unnecessarily," describes Zelinger. However, it's not just about control. When a driver has unsatisfactory results, management can analyse the specific causes and provide training. They can tell whether the driver, for example, underuses cruise control on highways or exceeds economical speed.

"We can tell them exactly where they're wasting fuel. And the driver can do something about it if they're interested," explains Zelinger.

## Long-term partnership delivers results

Eurowag has been a key partner in sustainable operations for Multitrans CZ for over fifteen years. Their long-standing relationship exemplifies what genuine partnership should look like when companies share common goals around efficiency and sustainability.

> **We refuse to waste time, money, or resources. It may not sound like a grand strategy, but ultimately, it's the most effective one.**


## "We've partnered with Eurowag for fifteen years running. Whether it's payment cards, toll management, or GPS tracking, we only adopt tools that actually work with our operations, not against them.

## "The company can assess which routes deliver the best value in terms of both time and total cost, including tolls and fuel consumption.

The company uses Eurowag's full range of services. "We've partnered with Eurowag for fifteen years running. Whether it's payment cards, toll management, or GPS tracking, we only adopt tools that actually work with our operations, not against them," says Zelinger.

Eurowag provides Multitrans CZ with detailed fuel purchase data, which is essential for emissions measurement and future reporting requirements. "Every time we fuel up, the system captures exactly what we've taken on, right down to fuel type and which station we used. Eurowag feeds us this data, and we pull it straight into our systems through their API," explains Zelinger.

GPS monitoring goes beyond simple vehicle tracking to analyse how drivers perform on the road. Data covering braking, fuel consumption, speed, and other metrics flows directly into Multitrans' internal systems for evaluation and driver coaching. "We don't digitize just for the sake of it, but we know exactly where technology saves us time, money, and fuel," adds Zelinger.

Eurowag's toll management also enables precise route tracking and optimization. **The company can assess which routes deliver the best value in terms of both time and total cost, including tolls and fuel consumption.**

### Sustainability in daily decisions

The pragmatic approach Multitrans CZ takes to sustainability shows most clearly in alternative fuels and electromobility. The company has extensive experience in this area. In the past, it ran on FAME (fatty acid methyl ester), though not for environmental reasons. "The only reason we ran on FAME was that it had no excise tax. It was a purely economic decision," admits Zelinger.

The company takes a similar stance on HVO (hydrogenated vegetable oil). "**If HVO is competitively priced, we'll use it. Otherwise, we need to convince customers to pay more for sustainable transport, because fuel makes up 30 to 35% of our costs,**" Zelinger explains.

The company finds that **most customers simply aren't demanding sustainable transport yet. The exceptions are large industrial companies like Škoda Auto and their suppliers, who already require $CO_2$ emissions reporting and favour greener solutions from tenders.**

On electromobility, Zelinger takes a practical view based on hard numbers. "I don't have a preference whether a truck runs on HVO or electricity, provided it meets our operational requirements. **If an electric truck can cover the required distance and charge during mandatory breaks, that works for us,**" says Zelinger.

However, infrastructure and economics remain the key barriers. Multitrans CZ has a 120-amp connection for its entire facility. "A truck would need 2000 amps to charge in reasonable time. We only have that kind of infrastructure on paper," says Zelinger. The economics don't stack up either, since an electric truck costs three times more than a conventional vehicle.

### Nine days from unloading to invoice is too long

**Multitrans CZ is systematically digitalizing its processes to minimize wasted time and resources.** The company has been using advanced scanning systems for four years, where documents undergo automatic processing, are sorted using OCR technology, and then linked with corresponding internal documents.

Now the company is preparing the next phase of digitalization. "After unloading, the driver photographs documents directly in the field, they automatically upload into the system, and then an invoice is generated and sent to the customer," explains Zelinger. This vision should dramatically shorten financial cycles.

Currently, the company has an average turnover of nine days from unloading to invoice issuance. "Cutting those nine days down would free up significant resources that we could use far more efficiently," says Zelinger. This digitalization would positively impact both cash flow and overall operational performance.

However, customers have widely varying requirements for document formats. "Each customer has slightly different requirements. One wants everything in one PDF, another wants each sheet separately, a third doesn't want it double-sided, a fourth wants to send some documents to one address and other documents to another," Zelinger describes.

## Labour market challenges

While many transport companies struggle with staff turnover, Multitrans CZ has found its own solution to keeping good employees. The company has clear rules but takes an individual approach to each employee. Drivers are encouraged to understand why the company operates as it does and to feel they are genuinely part of it.

"When you want people to do things properly, you need to give them a reason, not just an order. That goes for drivers, dispatchers, mechanics, and office staff alike," says Zelinger.

The company recognizes the current challenges facing the commercial road transport labour market. "Why would anyone want to be a driver these days? Years ago, when the average wage was 11,000 CZK and drivers earned 35,000 CZK, the difference was huge, and the job had real status. Today drivers have better working conditions and trucks you could practically live in, but they have zero personal time, and that's not what people want anymore," he says.

## Inspiration from neighbouring countries

Zelinger has a clear view of where the Czech transport market stands internationally. **"Take Poland for example. When we were both joining the European Union, they were behind us. Now they're miles ahead. They're in a completely different league in terms of infrastructure and business development. We simply fell asleep at the wheel,"** he explains.

He sees the root of the problem in how the Czech tax system is structured. "We've got road tax, tolls, plus ecological surcharges on top of tolls. Why not scrap the ecological surcharges and support HVO through lower excise duty instead? When the government brought in tolls, it promised better roads. That never materialised. Investment levels are the same as before," Zelinger argues.

"

# Every innovation must make economic sense, every system must genuinely improve efficiency, and every decision needs to be sustainable environmentally, economically, and socially.




For Zelinger, the Czech Republic finds itself in an increasingly difficult position. **"We're supposed to be Europe's crossroads, but all that's happening is highway charges keep rising, freight volumes are dropping, and we can't find drivers anywhere."**

## Building a sustainable industry future

Zelinger is neither an uncritical optimist nor a pessimist. He sees potential shifts in the global economy that could reshape the transport industry entirely. "We might see what's already starting in the west, where countries try to bring production back home. That would cut demand for international transport and shift everything to domestic routes. It's certainly one possible direction," reflects Zelinger.

The company prepares for changes systematically but avoids grand gestures. Every innovation must make economic sense, every system must genuinely improve efficiency, and every decision needs to be sustainable environmentally, economically, and socially.

Where sustainability is often discussed as a marketing trend, the Multitrans CZ approach feels genuine. This isn't a company chasing ambitious carbon neutrality targets, but one that makes hundreds of small daily decisions in ways that work for the business, its people, and the environment.

**"Sustainable doesn't mean green at any price. It's about doing business in a way that doesn't damage anything or anyone in the long run,"** Zelinger explains.

"The industry talks about sustainability constantly, but it rarely drives real decisions," Zelinger concludes. "We try to stay practical. If something makes sense both economically and environmentally, we'll do it. If not, we find another way. But we're not interested in being green just on paper."

This philosophy makes Multitrans CZ a proof that sustainability in transport doesn't require expensive technology or government subsidies. It starts with common sense, responsibility, and daily practices focused on efficiency and eliminating waste.

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**Every time we fuel up, the system captures exactly what we've taken on, right down to fuel type and which station we used. Eurowag feeds us this data, and we pull it straight into our systems through their API.**


Company name:

**Multitrans CZ, s. r. o.**

Year of foundation:

**2000**

Fleet size:

80 Vehicles and freight forwarders making approx. 2000 shipments monthly

Usage of Eurowag products by type:

- Tolls
- Fuel cards
- GPS monitoring

Turnover 2024:

**€15.62m**

Number of employees:

**80**

Founder/CEO:

**Ing. Bohuslav Bulíček**

Geographical scope:

**primarily Europe**

# Hungary

# Hungary: Market overview and outlook

It has been another challenging year for the Hungarian market. After the sharp decline in 2023, the road freight transport market leveled out in 2024, holding steady at around 33.5 billion tonne-kilometres, according to Eurostat. Domestic transport was supported by retail trade, but international transport remained under pressure, with weak export activity weighing heavily on overall performance.

Smaller operators continued to struggle, and many were forced out of the market. Those with diversified service portfolios and the ability to flexibly adjust capacity were better positioned to weather the difficulties. Larger companies with warehousing and value-added services managed to preserve their market position, in some cases even strengthening it.

In 2025, the economy has shown only minimal growth. Retail consumption and construction have provided some support, while industrial production has remained weak. Inflation has eased somewhat compared to the previous year, but financing costs remain high, and liquidity challenges persist. Companies face longer payment terms and elevated financing risk, which adds to their operational pressures.

Domestic transport has shown modest improvement, but international demand continues to decline, partly due to the weakness of exports and the strong presence of foreign competitors. While some capacity expansion was visible in the domestic segment, international fleets shrank further. The appetite for investment in new vehicles remained low, reflecting uncertainty in the industry.

Profitability remains fragile. Costs have grown in line with inflation, while freight rates have risen modestly, narrowing the gap between costs and prices. Some carriers have managed to operate with positive results, especially those that can shift between domestic and international markets. For many, however, profit sustainability remains uncertain.

Several structural tendencies define 2025. Profitability pressures remain strong, financing difficulties are widespread, and market demand is segmented between stronger domestic and weaker international performance. Diversified logistics providers continue to benefit, while smaller operators without flexibility face an increased risk of market exit. Large international shippers are also pushing for $CO_2$ reduction requirements, but the difficult economic environment limits companies' ability to invest in sustainable technologies.

Looking ahead, domestic demand is expected to remain moderately positive, while international freight recovery is unlikely before 2026. Costs and freight rates are likely to move broadly in line, keeping margins under pressure. The gradual consolidation of the market will continue, favoring companies with financial stability, flexible capacity management and a diversified service offering.

**Laszlo Kalman**
Country Manager for
Hungary market

## New commercial vehicle registrations (Q1-Q3 2025)

| | Heavy commercial vehicles | Medium commercial vehicles | Total | YoY change (Q1-Q3 2024) |
|---|---|---|---|---|
| Poland | 19 686 | 2 009 | 21 695 | 3,4% |
| Spain | 17 533 | 3 394 | 20 927 | -7,9% |
| Romania | 6 087 | | 6 087 | -4,9% |
| Czechia | 6 570 | | 6 570 | -3,8% |
| Hungary | 3 470 | 237 | 3 707 | -12,2% |
| Portugal | 3 832 | 426 | 4 258 | -8,2% |
| Slovakia | 2 052 | 218 | 2 270 | -12,4% |

Heavy commercial vehicles of 16 tonnes and over

Medium commercial vehicles between 3.5 and 16 tonnes

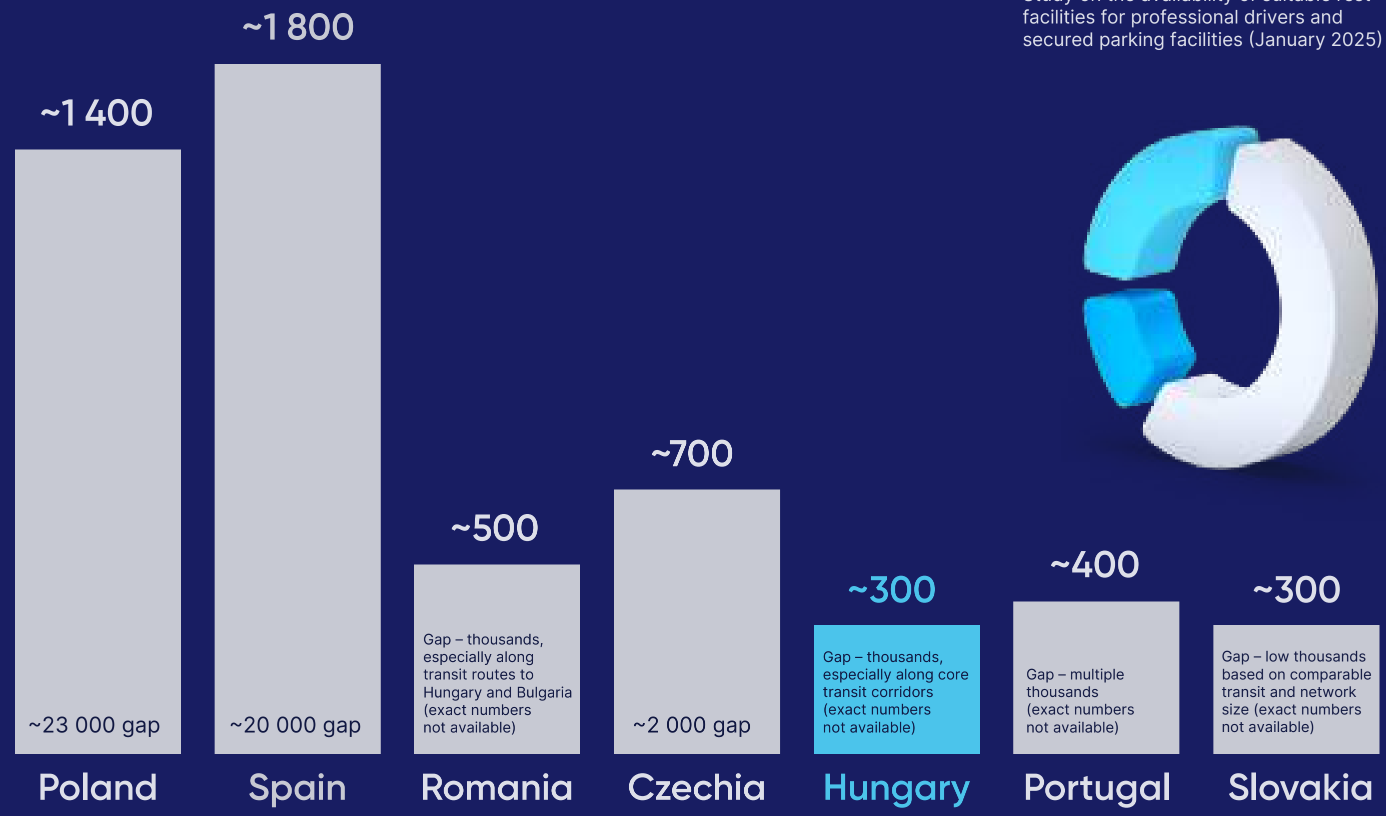
Source: ACEA

## Certified parking spots in 2025 in European Union

in millions of tonne-kilometers

Sources:
Published overviews of available parking locations for trucks certified by EU SSTPA standard, ESPORG, and TAPA

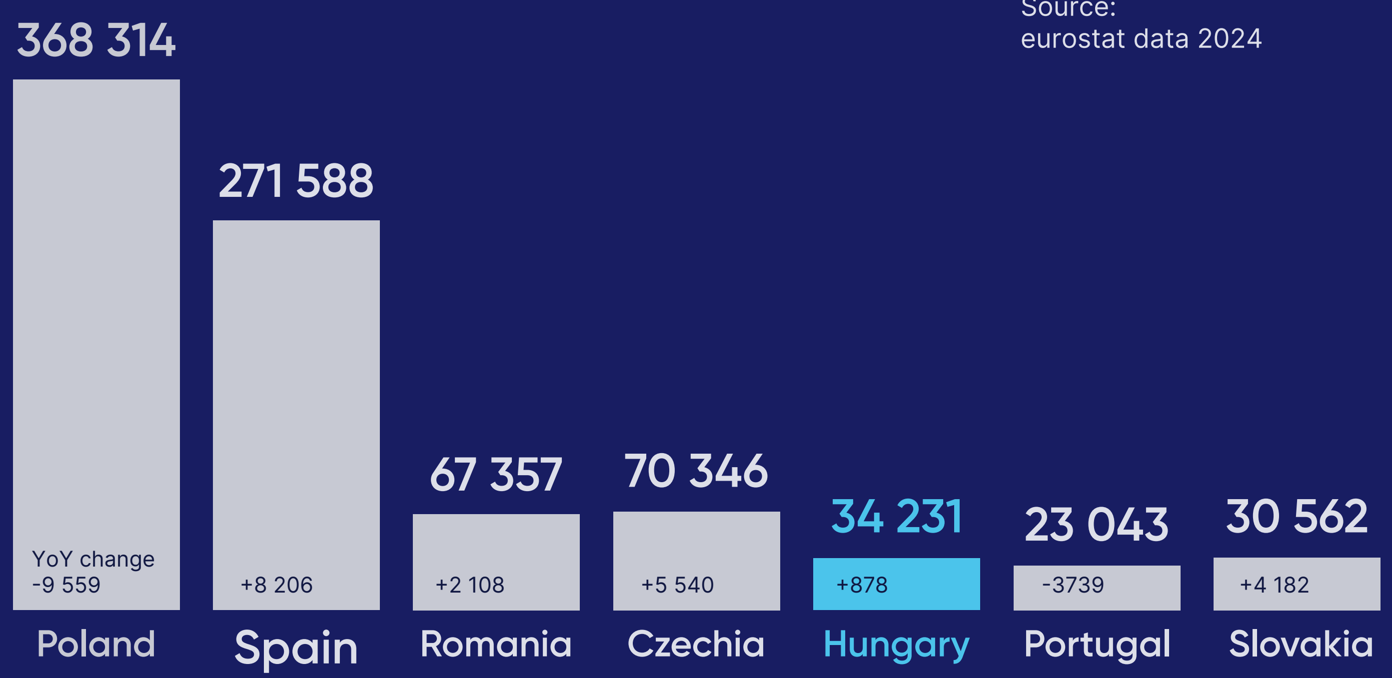
Study on the availability of suitable rest facilities for professional drivers and secured parking facilities (January 2025)




## Road freight volume in 2024*

* in millions of tonne-kilometers

Source:
eurostat data 2024




## Market players

**Market Leader**
**Trans Hungária Ltd.**

**Tech Trailblazer**
**Derby Trans Ltd.**

**Sustainability Star**
**Domino Trans Ltd.**

# Market Leader

Company:
Trans Hungária Ltd.
Country: Hungary


# Trans Hungária: 30 years in the lead

**Three decades of experience, a market-leading mindset, and continuous renewal – the story of Trans Hungária Kft. perfectly illustrates how a medium-sized company can become a key player in the Western European transport and logistics market. According to managing directors Sándor Parrag and István Bíró, the key to success lies in constant development, openness to new technologies, and a conscious strategy in which innovation and sustainability go hand in hand. Eurowag's solutions not only make the company's daily operations more efficient, but also more transparent.**

## Solid foundations, continuous growth

The company was founded in 1996 and has been growing ever since under the leadership of Sándor Parrag and István Bíró. Today, the team of more than 100 employees and the 74-vehicle fleet ensure a strong presence in both Hungary and the entirety of Western Europe. Despite economic difficulties in recent years, the company has maintained its stability and has even managed to strengthen in certain areas.

"2022 was the strongest year in the company's history, but since then, profits have declined year by year due to the deteriorating economic environment. In the first half of 2025, we could already feel some improvement, but this is mainly due to our more efficient operations, not the economic environment," says Parrag. Trans Hungária's philosophy is simple: they focus not on increasing turnover, but on stabilizing profits, as predictable management is the foundation of long-term sustainability.

## Innovation and milestones

The CRT business division is one of Trans Hungária's most dynamically developing areas, encompassing combined road transport solutions and traditional road haulage. In recent years, the company has continuously sought new opportunities in this field, creating value for partners who consider flexibility and environmental aspects as equally important.

Trans Hungária is proud to have acted as a pioneer in many industries, always offering innovative solutions to its existing partners. Whether it is the introduction of alternative fuels – such as HVO100 – a fleet renewal strategy, or the integration of digital tracking solutions, the company always prioritizes customer cost-efficiency and market trends. This approach strengthens loyalty and ensures that Trans Hungária remains a reliable long-term partner in the logistics chain.

Thus, the logistics portfolio goes far beyond classical freight forwarding. The company provides full warehousing services, domestic and international distribution, and flexible solutions for a wide range of industries – from automotive to manufacturing to retail. With this comprehensive approach, the company can meet the expectations of both multinational corporations and medium-sized enterprises.

The company's philosophy is well expressed by the motto often quoted by its leaders: "He who does not develop will fall behind." In this spirit, Trans Hungária launches new investments every year that serve both economic rationality and environmental sustainability. 2025 marks a major milestone at the Biatorbágy site: construction is underway on an energy storage system and electric truck charging station, paving the way for the company's first electric truck. The plan is to power the vehicle with green energy generated by on-site solar panels, turning this project into more than just a tech upgrade, but the start of a new era for the fleet.

Thus, the CRT division within Trans Hungária is not just a sub-area but the engine of growth and the key to the future, ensuring both market advantage and the foundations of sustainable operations.

> "The company car fleet is fully electric, and the first electric truck is on its way, which will regularly serve routes to Austria.

> "Trans Hungária's fleet management is completely transparent, costs are optimized, and real-time data enables faster decision-making.

## Digital and sustainable future

For Trans Hungária, sustainability is not just a slogan, but an integral part of its daily operations. The Biatorbágy site already operates with solar panels, **the company car fleet is fully electric, and the first electric truck is on its way, which will regularly serve routes to Austria.**

The company is also a leader in the introduction of alternative fuels: for more than a year, they have been using HVO100 renewable diesel for a major partner, consuming around 1,500 liters daily. This step reduces emissions and sets a higher standard for sustainable logistics in both Hungary and Germany.

Eurowag's role is particularly significant here: from fuel accounting to toll management to VAT refunds, the company provides integrated digital solutions. As a result, **Trans Hungária's fleet management is completely transparent, costs are optimized, and real-time data enables faster decision-making.** Dispatchers and the finance team work with the same information, making daily operations smoother and transport planning more efficient. This cooperation goes beyond providing a service — it's a strategic partnership built to create lasting competitive advantage.

**"The biggest achievement is that transport organization has become more efficient, the number of empty runs has decreased, and mileage has increased," adds Parrag.**

## Market leader mentality

Through ongoing improvements, sustainability projects, and its partnership with Eurowag, Trans Hungária plays an active role in shaping market trends. "We like to follow our own path, we don't copy the competition. For us, innovation is not a trend, but a strategic decision," Parrag concludes.

The company's history is a good example of how conscious growth, flexibility, and people-oriented thinking can lead to a stable, market-leading role in the international logistics sector.

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**The biggest achievement is that transport organization has become more efficient, the number of empty runs has decreased, and mileage has increased.**

Company name:

**Trans Hungária Ltd.**

Year of foundation:

**1996**

Fleet size:

**74**

Revenue 2024:

**€12.4m**

Number of employees:

**104**

Usage of Eurowag products by type:

Tolls

Banking services

VAT refund

Fuels

Founder/ Managing director:

**Sándor Parrag/ István Bíró**

Geographical scope:

**Western Europe**

# Tech Trailblazer

## Company: Derby Trans Ltd. Country: Hungary


# Derby Trans: Embracing technical innovations in logistics

**In 1996, after much planning and hard work, László Szvitek founded Derby Trans with his father. In the early days, they started with just two people and one 7.5-tonne, curtain-sided vehicle. Specializing in high value and refrigerated freight transport, the company has grown to become one of the leading players in Hungary, in part thanks to a prudent management strategy and technological solutions that deliver value to customers. The driving force behind Derby Trans is an openness to innovation, and it is this common belief that has made the 12-year partnership with Eurowag so influential on the company's trajectory.**

László Szvitek grew up in a family of truckers; his father had worked for Hungarocamion for nearly 20 years, when **in 1996 they decided to start their own business, and founded Derby Trans with a single 7.5-tonne, tarpaulin-type vehicle.** After just a year, six vehicles were already transporting goods from Székesfehérvár to Frankfurt airport. In 1999, their first 40-tonne vehicle was acquired, and it was also the year in which the company passed their first million kilometers driven. After the turn of the century, the heavy-duty fleet was further expanded, and by the end of 2004, when the international transport market was opened due to EU accession, the company had eight 40-tonne vehicles in operation. These were used until 2008, when the global economic crisis hit. Something new had to be invented, because the tarpaulin market was not much of a specialty. That's when the idea to incorporate refrigerated cars came up, which turned out to be one of the best investments and is still the backbone of the business today.

This was followed by the transport of dangerous goods (ADR). Even today, ADR is still not widely used because it is a highly complex speciality, and the authorities often take extra time inspecting these vehicles. Today, Derby Trans is one of the largest Hungarian-owned ADR refrigerated fleet carriers on the market.

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## We did not own a site for 25 years. That means being tied to a particular municipality or region, and it was more important for me to be flexible.

With these new developments, box cars could then be used to transport not only tempered goods, but also high-value items, computers and other electronics. They also added value to their services by installing GPS and panic buttons in their trailers, so they could be found if they were accidentally dumped or taken. They have weathered every crisis, growing to 50-60 cars in 2016.

That year they set up Derby Logistics, a company they outsourced their car business to. Here, the customers, expectations, and nature of the business are not the same, and these operations need different cars with different capacities. For years now, subcontractors have been involved in servicing customers. With their help, they can achieve a 96-97% occupancy rate, which is an excellent ratio, and they can also compensate for seasonal fluctuations. The total fleet has now grown to over 150 vehicles.

The company has experienced stable growth, mainly due to the management style of László Szvitek, who has a philosophy of taking slow, methodical steps rather than forcing fast growth. "I'm a bit of a safety player, I don't believe in rapid growth, I basically like to build slowly and calmly. I lived through the 2008 crisis, when companies that had come out of nowhere in 2004, following the EU's expansion, started transport businesses with fleets of 100-200 vehicles. Almost all of them went bust. We also had about 10-15 cars at that time, so we kept a modest fleet compared to those examples. For us, it proved to be a very good decision to follow the step-by-step approach. Perhaps it is also characteristic that we did not own a site for 25 years. That means being tied to a particular municipality or region, and it was more important for me to be flexible. But in 2022, we continued to expand our activities, so I felt the time was right to have our own base," says Szvitek.

### Reliability is the greatest value

From the beginning, László Szvitek saw potential in the international market, and 90% of the company's revenue still comes from international clients. However, for a company to succeed in the international market, it needs to provide a quality of service that adds value.

"In haulage, this means making sure vehicles are clean and in impeccable technical condition; that we deliver the agreed journeys on time, and that drivers and staff are trained to deliver on the commitments. Punctuality here means that on the 1,300th kilometer Frankfurt-Barcelona route, a maximum delay of one hour is allowed," says Szvitek. For Derby Trans to keep its commitments, it is essential to be open to using technology solutions that support smooth operations.

Eurowag has been a partner of Derby Trans for 12 years, mainly providing fuel cards and toll services. "Eurowag's solutions are a significant help in ensuring that our processes are efficient. Toll and fuel card services take a massive administrative burden off our shoulders and speed up the organization of international transport, supporting freight management and stability. It helps us and it helps drivers. Webeye security, GPS tracking, and door opening sensors are essential for the transport of high-value or heat-sensitive goods, which account for almost 100% of our shipments. And, of course, it is not negligible that thanks to these smart solutions, any misuse has been reduced to virtually zero," Szvitek adds.

At the same time, the solutions used by Derby Trans not only support the company's operations. They also provide value to customers, with solutions such as GPS and panic buttons on tractors and GPS tracking on trailers, all of which ensure the safety of the cargo.


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## Eurowag's solutions are a significant help in ensuring that our processes are efficient. Toll and fuel card services take a massive administrative burden off our shoulders and speed up the organization of international transport.

## Keeping up with the future

The logistics market is changing, and the need for improvements is felt across the board. "You simply cannot sit back. If we don't react to the impacts we are facing, we are essentially lagging behind. **Customers are price conscious, and this will not change. Interestingly, the increase in fuel prices is easier to digest, but the experience with the toll increase was completely different. But just as with tolls, we are penalizing outdated fleets, I think that will happen in almost all areas sooner or later.** However, the road to sustainable transport is still rather bumpy. For the time being, environmentally friendly solutions are available at a premium, even HVO has a minimum 3-5% extra cost on the customer side. **We offer this option to all our customers, but only about 2 out of 10 are willing to pay the higher costs. What we see is that on the client side there is only openness where sustainability is of value, which is not surprising as it does not pay off in the short term on the financial side.** At the same time, it must be taken into account that logistics will not become a sustainable industry overnight, and that service providers and customers must play an active role in this process," Szvitek says.

On the service provider side, parts of this process are fleet rejuvenation and maintenance, the use of alternative fuels and solutions, the use of computing and telematics solutions to optimize fleet operations. There is no doubt that artificial intelligence will eventually be included in this process.

"It is practically inevitable that AI will be part of our processes sooner or later, but there will always be a human element involved. I think it can be of great help to colleagues in transport management, but not everything should be automated, and for certain things - to give you an example - to write the most optimal fleet schedules or to immediately fix everyday nuances, we will still need transport managers," concludes Szvitek.




Company name:

**Derby Trans Ltd. (a part of Derby Group)**

Year of foundation:

**1996**

Fleet size:

**150**

Revenue 2024:

**€65.7m**

Number of employees:

**230**

Usage of Eurowag products by type:

- Fuel cards
- Toll
- Telematics
- Alternative fuels

Founder/CEO:

**László Szvitek**

Geographical scope:

**Western Europe**

# Sustainability Star

Company:
Domino Trans Ltd.
Country: Hungary


# Domino Trans: a family-based business

**Three decades of growth, family values, and innovative partnerships – the story of Domino Trans is a prime example of how a small family business can become a key logistics player in the Western Hungary region. According to managing director András Bánfi, the key to success lies in long-term thinking, nurturing in-house talent, and forging strategic partnerships that create real value. Eurowag's digital solutions have not only simplified daily operations at Domino Trans, but also made them more transparent and efficient – taking fleet management and planning to a whole new level.**

The history of Domino Trans, Ltd., dates back more than thirty years, to the late 1980s. It was then that András Bánfi's father founded the business in Szombathely, Hungary, as a family-run enterprise. Over the decades since its inception, the company group has undergone significant development and has grown into a medium-sized enterprise consisting of three companies. Domino Trans handles transportation activities, Domino Logistic specializes in logistics services, while Bandl 2000 serves as an investment entity.

During the period of economic transition following the regime change, Domino Trans already served the local light industry — such as shoe manufacturing. Market changes brought new challenges, but the company has always managed to adapt while maintaining its reliability and human-centered approach. The long-term partnerships they have built are the result of this mindset, and they have been working with several clients for over three decades.

## In-house talent development – a response to labor market challenges

Hungary's accession to the European Union in 2004 opened new horizons for the domestic logistics sector. With open borders, a single market, and transport liberalization, new business opportunities emerged for Domino Trans as well—especially in the field of international transport. However, these changes brought not only opportunities, but also significant challenges.

Wages and working conditions in Western Europe often lured experienced drivers away from the Hungarian market, particularly in border regions. At the same time, the average age of domestic drivers steadily increased, while the supply of new drivers did not keep pace. High turnover, lack of language skills, and the lifestyle changes required by long absences from home all contributed to driver shortage becoming one of the most pressing issues in the sector.

Domino Trans chose not to remain at the mercy of labor market fluctuations and made a strategic decision: it launched its own in-house talent development program with the support of the National Employment Fund (OFA). The program targets young people who already hold a category B driver's license but have not yet made a final decision about their career path.

"The training provides a gradual entry into the world of professional driving: participants are given van-driving tasks even while still studying, allowing them to experience the daily realities of transport firsthand. At the same time, they are gradually preparing to obtain their category C and E licenses. At the end of the program, a two-year employment contract awaits them, allowing the company to secure a loyal and stable workforce. For us, this is a real innovation. These young people learn our system—our routes, our expectations, our behavioral standards. By the time they become truck drivers, they are fully prepared—not only technically, but also in terms of attitude and values," emphasizes András Bánfi.

The program is both effective from a professional standpoint and also helps shape the company culture. The new generation is socialized within the value system of Domino Trans, ensuring the long-term stability of the company and the maintenance of high-quality services.

This initiative serves as an exemplary response to how a family-owned medium-sized business can address an industry-wide challenge in a conscious and sustainable manner.

## Digital harmony: The partnership between Domino Trans and Eurowag

The collaboration between Domino Trans and Eurowag initially focused on specific services such as fuel cards, but positive experiences and the reliability of the system gradually led to a closer partnership. Today, Domino Trans uses nearly the entire Eurowag portfolio, including toll management, fuel accounting, VAT refunds, and fleet-tracking navigation systems, all accessible through a single, integrated provider.

This "everything under one roof" approach simplifies administration and significantly improves operational efficiency. Previously, the company had to manage relationships with multiple providers, reconcile data, and handle the differing formats of various systems. Eurowag now offers a digital platform that delivers all these services in a unified, structured, and real-time manner. "The greatest advantage for us has been the quality of data delivery. We receive accurate, real-time information, and we can view fuel prices and vehicle positions on a single interface. This is an enormous help in decision-making," emphasizes Bánfi.

Real-time data flow is particularly useful in daily operations. Dispatchers, fleet managers, and financial leadership work with the same data set, allowing them to respond more quickly and accurately to changing situations—whether it's about route planning, refueling strategies, or cost analysis.

As a result of the partnership, Domino Trans has simplified and secured its operations and developed a data-driven decision-making culture that provides a competitive advantage in the rapidly evolving logistics market. "Eurowag is not just a service provider, but a true partner in the life of Domino Trans—one that can respond to our real, everyday operational needs and thus contributes to our long-term growth," adds Bánfi.

## Sustainability in practice: A strategy, not a showcase

For Domino Trans, sustainability is not just a buzzword, but a consciously built, long-term strategic direction. According to András Bánfi, no logistics company can be taken seriously today if it doesn't actively consider reducing environmental impact and improving energy efficiency. This mindset is reflected in every decision, investment, and operation across the company.


> "We receive accurate, real-time information, and we can view fuel prices and vehicle positions on a single interface. This is an enormous help in decision-making.

The most visible results can be seen at the fleet level; the domestic division's ten trucks currently operate exclusively on HVO100 renewable diesel fuel. Compared to conventional diesel, this fuel reduces carbon dioxide emissions by 85%, with only about a 4% cost premium. "Sustainability is not only a principle but a market expectation. Large corporations have already begun the transition – and we are ready to be their partners in this process," says Bánfi.

This approach reflects both the company's internal values as well as a proactive adaptation to customer demands. One of Domino Trans's key partners, Schaeffler Savaria, is now supplied exclusively with domestic logistics services powered by this environmentally friendly fuel. This translates to about 9,000 liters of HVO100 used per month—representing a significant and truly impactful step toward reducing the carbon footprint, not just a symbolic gesture.

Sustainability also played a central role in the planning of the company's new site. Achieving energy self-sufficiency was treated as a fundamental requirement from the start. The facility is equipped with solar panels, which substantially reduce electricity consumption and, in turn, operating costs. This is another step toward ensuring that Domino Trans's green footprint is measurable through its vehicles and its office and warehouse infrastructure.

Environmental protection has become an integral part of daily operations. Since 2013, Domino Trans has operated under the MSZ EN ISO 14001:2005 environmental management system, which covers both domestic and international transport activities. Hazardous waste—such as used oil, batteries, or tires—is transported and handled exclusively by certified partners. The fleet is constantly being modernized, and only low-emission, state-of-the-art trucks are kept in service.

Not only following sustainability trends, Domino Trans is actively shaping the future of sustainable logistics—setting an example where business rationality and environmental awareness go hand in hand.

## "This "everything under one roof" approach simplifies administration and significantly improves operational efficiency.

Company name:

**Domino Trans, Ltd.**

Year of foundation:

**1989**

Fleet size:

**100+**

Revenue 2024:

**€18.05m**

Number of employees:

**150**

Usage of Eurowag products by type:

- Tolls
- Fuel cards
- VAT refund
- Navigation

Founder/CEO:

**Péter Bánfi Sr. / Péter Bánfi Jr., András Bánfi**

Geographical scope:

**Hungary Western Europe**

# Portugal

# Portugal: Market overview and outlook

The transport sector in Portugal remains a strategic pillar of the national economy, despite a challenging environment. In 2024, international road freight transport recorded a decrease of 14% compared to the previous year, mirroring the same downward trend recorded in nine other EU countries. In the coming years, a gradual recovery of the Portuguese economy is projected, with growth forecasts of 2.0% in 2025, and 2.1% in 2026.

The largest share of road freight traffic in Portugal is carried over distances between 500 and 999 km, reaching 4 billion tkm in 2024., underlining the importance of mediumand long-distance transport for the sector's competitiveness. The Portuguese market is predominantly composed of micro and small companies, which play a crucial role in serving local and regional demand, although they face additional challenges in adopting advanced technology and sustainable practices.

Spain remains the main destination for international road freight transport carried out by Portuguese companies, accounting for more than 65% of the total volume transported, while road transport between Portugal and Spain represents around 1% of the total goods transported in the EU.

The transport sector is being shaped by strong, transformative trends Sustainability and green practices, particularly the adoption of alternative low-emission fuels, are gaining momentum. At the same time, digitalization, automation, and the application of artificial intelligence are redefining operations, boosting efficiency, and opening new opportunities for innovation. Companies that anticipate these changes will be better positioned to face the challenges of a highly competitive and constantly evolving market.

Throughout the rest of 2025 and into 2026, investments in smart infrastructure, hybrid transport systems, and digital tools are expected to strengthen these trends and help businesses meet growing demand in a highly competitive market.

We have actively contributed to this evolution with increasingly efficient and innovative solutions. Over the past years, we have integrated several companies in Portugal, expanded and enhancedour products and services, deepened our engagement, and strengthened proximity with our customers.

This path is reflected in our consistent market share growth and in maintaining a leadership position in international transport services. We work side by side with some of the main national players, such as Patinter - Portuguesa de Automóveis Transportadores, S.A., Transportes Bernardo Marques, S.A., Jotavio – Transportes, S.A., Manuel & Miranda Transportes, Lda., and Francisco & Almeida, Transportes Lda., among many others who rely on our services every day. This commitment highlights Eurowag's role in supporting carriers, distinguished by innovation, customer proximity, sustainability, and performance excellence.

**Tiago Areias**
National Sales Manager
for Portugese market

## New commercial vehicle registrations (Q1–Q3 2025)

| | Heavy commercial vehicles of 16 tonnes and over | Medium commercial vehicles between 3.5 and 16 tonnes | | YoY change (Q1–Q3 2024) |
|---|---|---|---|---|
| Poland | 19 686 | 2 009 | 21 695 | 3,4% |
| Spain | 17 533 | 3 394 | 20 927 | -7,9% |
| Romania | 6 087 | | 6 087 | -4,9% |
| Czechia | 6 570 | | 6 570 | -3,8% |
| Hungary | 3 470 | 237 | 3 707 | -12,2% |
| Portugal | 3 832 | 426 | 4 258 | -8,2% |
| Slovakia | 2 052 | 218 | 2 270 | -12,4% |

Heavy commercial vehicles of 16 tonnes and over

Medium commercial vehicles between 3.5 and 16 tonnes

Source: ACEA

## Certified parking spots in 2025 in European Union

in millions of tonne-kilometers

Sources:
Published overviews of available parking locations for trucks certified by EU SSTPA standard, ESPORG, and TAPA

Study on the availability of suitable rest facilities for professional drivers and secured parking facilities (January 2025)

| | Certified parking spots | Gap |
|---|---|---|
| Poland | ~1 400 | ~23 000 gap |
| Spain | ~1 800 | ~20 000 gap |
| Romania | ~500 | Gap – thousands, especially along transit routes to Hungary and Bulgaria (exact numbers not available) |
| Czechia | ~700 | ~2 000 gap |
| Hungary | ~300 | Gap – thousands, especially along core transit corridors (exact numbers not available) |
| Portugal | ~400 | Gap – multiple thousands (exact numbers not available) |
| Slovakia | ~300 | Gap – low thousands based on comparable transit and network size (exact numbers not available) |

## Road freight volume in 2024*

* in millions of tonne-kilometers

Source:
eurostat data 2024

| | Road freight volume | YoY change |
|---|---|---|
| Poland | 368 314 | -9 559 |
| Spain | 271 588 | +8 206 |
| Romania | 67 357 | +2 108 |
| Czechia | 70 346 | +5 540 |
| Hungary | 34 231 | +878 |
| Portugal | 23 043 | -3739 |
| Slovakia | 30 562 | +4 182 |

## Market players

| Market Leader | Tech Trailblazer | Sustainability Star |
|---|---|---|
| **Jotavio - Transportes S. A.** | **Transmarsil - Transportes Lda.** | **Manuel & Miranda Transportes Lda.** |

# Market Leader

Company: Jotavio - Transportes S. A.
Country: Portugal


JOTAVIO
THE TRANSPORT COMPANY

## Jotavio: grew 22% in the first half of 2025 and is preparing for the energy transition

**The Portuguese road freight company strengthens logistics, invests in innovation, and sets sights on low-emission transport starting from 2026.**

After a slower-than-expected start to the year, Jotavio, a specialist in the road transport of fruits and vegetables, ended the first half of 2025 with strong results. The company reported a 22% increase in revenue and a 5% rise in net profit compared to the same period in 2024, confirming its ability to navigate market volatility through operational focus and cost discipline.

As **CEO and founder Octávio Martins** put it, “The first two months of the year didn’t meet our expectations, but overall, the semester outperformed 2024. These numbers confirm that our focus on operational discipline and adaptability is paying off.”

# Tools like Eurowag's help us stay competitive by offering favorable fuel conditions and flexibility to adjust pricing whenever needed.

## Daily cost control and strategic partnerships

In a low-margin sector like road transport, cost efficiency is a daily concern. **Jotavio has placed operational discipline at the center of its management approach, continuously monitoring costs to ensure sustainable performance. A longstanding partnership with Eurowag has been instrumental in this strategy.** "Controlling costs is part of our daily routine," Octávio explains. "Tools like Eurowag's help us stay competitive by offering favorable fuel conditions and flexibility to adjust pricing whenever needed."

## A steady CRT evolution with a focus on fresh goods

Jotavio's core road freight business has grown steadily in recent years, with particularly strong momentum in the Spanish market since the pandemic. This growth has been driven by a clear focus on client needs and a tailored approach to service. "Our business is built on trust and customization," says Octávio. "That's why we've become a reference in the transport of fresh produce, especially fruits and vegetables."

While the company remains open to transporting other types of goods, it prioritizes horticultural products, where it has a wealth of expertise. Its fleet includes approximately 80 refrigerated Scania trucks with Schmitz trailers, all about five years old on average—well suited for the transport of perishable goods.



In parallel, the company has strengthened its logistics division, which now accounts for a significant share of its total revenue: it handles over 3,000 thousand pallets of fruit and vegetables per month through five logistics support warehouses located in strategic points, enabling the delivery of fresh products in less than 24 hours to any location in the Iberian Peninsula. The expansion into integrated logistics services reflects a broader evolution in the company's positioning — from a transport provider to a full-service logistics partner.

## Commitment to innovation and technological investment

Technology continues to be one of Jotavio's competitive differentiators. **Over the past two years, the company has implemented artificial intelligence-powered software across finance, accounting, and invoicing systems to streamline internal operations.** "We are constantly investing in both hardware and software, not only for our fleet but also for back-office operations," Octávio says. "Innovation is non-negotiable if we want to stay relevant in this market."

That same mindset extends to the fleet. While the company still primarily operates diesel-powered vehicles, part of the fleet is renewed annually, and alternative energy options are actively being explored.

## While the company still primarily operates diesel-powered vehicles, part of the fleet is renewed annually, and alternative energy options are actively being explored.

### Financial performance and responsible growth

In 2024, the company reported revenues exceeding €19.5M. Although investment activity has led to a moderate increase in debt, Jotavio maintains a solid financial position, supported by commercial banking partners and the Portuguese Development Bank. Management emphasizes that growth has been sustainable and aligned with long-term planning.

### Early-stage sustainability and energy transition strategy

Sustainability will soon become an important factor for Jotavio's future. As of now, the company has not yet published ESG or carbon reports, nor has it appointed a dedicated sustainability coordinator. However, it is beginning to act on a roadmap aligned with European environmental legislation. "We know we're only at the beginning of our sustainability journey," Octávio acknowledges. "Still, we are monitoring legislation carefully and making decisions that align with Europe's decarbonization goals."

The company expects to begin using low-emission fuels in selected vehicles by the second half of 2025 and plans to introduce electric trucks into its national operations in 2026.

Although clients have yet to request carbon data, Jotavio anticipates that expectations will change and is preparing accordingly. Legislative frameworks such as AFIR, REDIII, and CSRD are already being factored into investment decisions.

### People and operational discipline at the core

In response to the ongoing driver shortage in the European transport sector, Jotavio has reinforced its human resources strategy. "Our people are our most important asset," says Octávio. "We focus on recognition, training, and creating the conditions for long-term engagement."

Alongside these efforts, the company maintains strict control over all kilometers traveled—including empty kilometers—as part of its commitment to efficiency and sustainability.

### Outlook: Structural change and sector evolution

Looking ahead to 2026, Jotavio anticipates further transformation across the road freight industry. Octávio believes the company is well-positioned for the changes to come: "We see a future shaped by three pillars: innovation, sustainability, and people. With a clear vision and strong execution, we're confident in our ability to remain a leading player in Portugal and beyond."

## "We see a future shaped by three pillars: innovation, sustainability, and people.

Company name:
**Jotavio - Transportes, S. A.**

Year of foundation:
**1999**

Fleet size:
**80**

Revenue 2024:
**€19.4m**

Number of employees:
**152**

Usage of Eurowag products by type:

- Fuel
- Fine management
- VAT refund
- Toll

Founder/CEO:
**Octávio Martins**

Geographical scope:
**Iberian Peninsula**

# Tech Traiblazer

Company: Transmarsil - Transportes Lda.
Country: Portugal

# TRANSMARSIL: boosting efficiency and digitalisation in a semester marked by instability

Transmarsil

**In the first half of this year, TRANSMARSIL remained among the leading transport and logistics companies in Algarve. Faced with sector instability, the company accelerated operational efficiency and cost-reduction measures, powered by digital solutions for fleet and fuel management. "Route planning and expenditure control allowed us to gain competitiveness," says César Silva, Commercial Assistant.**

## 30 years on the road, sustained growth

Founded in 1994 by Marco Silva and Anabela Vás Silva, TRANSMARSIL began expanding internationally in 2006 and established its own facilities in 2016. The company is currently led by Marco Silva. Today, the group employs around 150 people and operates approximately 80 heavy vehicles and 15 light vehicles. The company is the exclusive representative of Chep in the Algarve and created the region's first heavy-vehicle wash that recovers 80% of the water used, reinforcing its commitment to resource efficiency.

## Efficiency and smart savings

When asked about cost-cutting measures, César Silva points to an integrated strategy that includes digital fleet data integration for more accurate reporting and better decision-making, strict tachograph management to optimize driving times and ensure compliance, and process automation to reduce administrative workload and speed up operations.

A key lever has been the use of Eurowag fleet cards across the long-haul network.

"Eurowag's fuel cards gave us exactly what we needed in a volatile semester: reliable pricing, cashless payments across Europe, and consolidated invoices in one place. That combination reduced admin time, improved cash-flow visibility and helped us keep costs under control trip by trip," says Silva.

## Technology at the core of operations

Over the past two years, TRANSMARSIL has strengthened process digitalisation and is expanding automation in areas such as invoicing, HR and planning. Telematics for fleet monitoring and digital tachographs are already part of daily operations. "We're interested in artificial intelligence for route planning and cost analysis, although it is not yet in operation. The spend data from Eurowag's fuel cards already gives us a solid base to prepare those models," notes Silva. Compared with similarly sized peers, TRANSMARSIL sees itself at the forefront of digitalisation, data-driven fleet management and investment in sustainability.

## Sustainability and decarbonisation: a work in progress

Fleet renewal is themain focus for reducing consumption. Although the company does not yet operate electric trucks or use bio-LNG or HVO, these alternatives are "under consideration in the medium term". The company doesn't yet measure its carbon footprint, but it is developing mechanisms to track this indicator and reduce emissions in a more structured way. In parallel, the consolidated invoicing and multi-currency, cashless purchasing enabled by Eurowag support tighter spend control as the company evaluates new energy options.

## Stable results

In 2024, TRANSMARSIL recorded €11 million in revenue and €1.2 million in net profit. "Performance has remained stable in recent years," says Silva.

## What it transports and where it operates

The company handles general cargo and temperature-controlled goods across Europe, with a strong focus on the Netherlands and stable routes to several other European markets. Regionally, it ensures food and beverage distribution throughout the Algarve, complementing its activity with logistics services. "We don't refuse any type of cargo," he stresses.

## The fleet, in detail

TRANSMARSIL operates a fleet of 80 heavy vehicles, all equipped with digital tachographs, and 15 light vehicles. The average fleet age is 5.6 years. Heavy vehicles are used exclusively for long-haul operations, while light vehicles make up 16% of the regional fleet.

## People, training and technology

The driver shortage is felt "as across the sector" and is being mitigated through investment in technology and internal training to raise productivity and attractiveness.

## 2025: more regulation and more data

For 2025, César Silva expects greater European regulatory pressure on decarbonisation (AFIR, RED III, CSRD), growing demand for sustainable transport services and even more intense digitalisation. "Data analysis will be a key source of competitive differentiation," he concludes.

"

**We're interested in artificial intelligence for route planning and cost analysis, although it is not yet in operation. The spend data from Eurowag's fuel cards already gives us a solid base to prepare those models.**

"

**Eurowag's fuel cards gave us exactly what we needed in a volatile semester: reliable pricing, cashless payments across Europe, and consolidated invoices in one place. That combination reduced admin time, improved cash-flow visibility and helped us keep costs under control trip by trip.**

Company name:

**Transmarsil - Transportes Lda.**

Year of foundation:

**1994**

Fleet size:

**80** heavy vehicles

**15** light vehicles

Revenue 2024:

**€11m**

Number of employees:

**150**

Usage of Eurowag products by type:

Fuel cards

Founder/CEO:

**Marco Silva and Anabela Vás Silva / Marco Silva**

Geographical scope:

**National and international (Europe)**

# Sustainability Star

Company:
Manuel & Miranda Transportes Lda.
Country: Portugal


# Manuel & Miranda Transportes: Sustainable growth with a focus on decarbonization

Manuel & Miranda Transportes, a company specialized in commercial road transport across the Iberian market, has established itself through its adaptability, strategic vision, and gradual commitment to sustainability. Presently led by the founders' daughters, Sílvia, Sofia, and Dulce Martins, who are now executive directors, the business blends operational prowess with a thoughtful approach to the industry's social and environmental issues.


## Development despite adversity

The first half of 2025 produced encouraging outcomes despite unstable economic conditions and shifting operating expenses. Due to effective management and stabilization of supply and outsourced service costs, the directors report a 5% increase in service delivery over the same period in 2024. The only cost that went up was personnel.

M&M started swapping outdated cars for more fuel-efficient models to reduce costs and increase energy efficiency. They continue to benefit strategically from their long-standing alliance with Eurowag, which dates back 26 years to the company's founding. The platform's wide network of refuelling stations made it possible to plan routes more efficiently and buy fuel at more affordable costs, which directly improved operational and financial sustainability.

## Decarbonization: Ambition meets real-world barriers

The company embarked on its decarbonization journey in 2018, when the first liquefied natural gas (LNG) truck proposals entered the market. In 2019, M&M acquired its first LNG-powered vehicle, eventually reaching a total of six LNG trucks and one dual-fuel diesel and LNG vehicle.

Initially, LNG's competitive cost made the investment worthwhile. However, the COVID-19 pandemic and the war in Ukraine caused gas prices to soar. "We went from a promising scenario to a reality where even our customers asked us to avoid using LNG trucks due to higher transport costs," explain the directors. They received no government incentives or external support; the transition was self-funded, driven by environmental awareness.


> **The company strives to ensure vehicles are loaded both outbound and on return trips, with empty runs being rare and usually tied to breakdowns or specific pickup needs.**

Due to technical constraints and the high cost of LNG, the fleet is currently not using alternative fuels. In comparison to traditional trucks, the LNG vehicles have shown greater maintenance requirements, including longer downtime, more difficult-to-source parts, and higher repair costs. Additionally, frequent and intricate logistical rearranging is necessary due to their reduced driving range.

## Refueling infrastructure still a challenge

The lack of adequate refuelling infrastructure remains a major barrier to adopting diesel alternatives. Since acquiring their first LNG trucks, the company has seen improvements in the availability of refuelling stations, but says, "coverage remains insufficient in many parts of the Iberian Peninsula." There have been cases where vehicles had to be rerouted solely for refuelling, a logistical and environmental cost that undermines efficiency.

In order to make alternative fuel operations more feasible, M&M thinks Eurowag can play a significant part in this by growing its network of LNG refuelling stations. Additionally, they emphasize that truck manufacturers must expedite the development of more durable models that are easier to maintain and have a longer range.

## Smart driving and technology to boost operations

M&M places a high premium on ongoing driver training. The company regularly arranges training sessions centred on fuel efficiency and road safety best practices in collaboration with automakers. Geolocation systems track driver behaviour, allowing for prompt feedback and remedial action when necessary.

"We believe that a well-trained driver makes all the difference, both in safety and fleet performance," say the directors. Additionally, driver communications are being digitalized, which will simplify operational duties and daily management.

## Integrating social sustainability into business culture

The strategic pillar of sustainability is the well-being of employees. The directors claim that the company's investments in team-building exercises, workplace safety, and training "strengthen the sense of belonging and elevate the professionalism of our teams." Higher employee retention and a more collaborative work environment are the outcomes of this investment.

## Operational profile: Integrated transport and logistics

Operating in the Iberian market, M&M's fleet includes 27 tractor-trailers with curtain-sided semi-trailers with the average age of five years, four two-axle trucks for pickups having an average age of 17 years, and six light vehicles with an overall average age of seven years. While they don't yet operate electric vehicles, which are currently impractical for long-haul transport, they remain attentive to technological developments in the industry.

They primarily transport general cargo from the manufacturing sector, including construction materials, metal profiles, home textiles, and non-perishable food items. Extremely heavy loads, such as stone blocks, are avoided due to their inefficiency in fuel consumption. In addition to transport, M&M also offers logistics services, from collection to goods handling.

## Environmental management through audits and planning

Each year, M&M conducts an energy audit and develops a consumption rationalization plan to assess fuel usage and $CO_2$ emissions by vehicle. These findings guide the implementation of efficiency measures for the following year. Although the company doesn't yet publish an ESG report, it is fully prepared to meet future regulatory demands.

They do not currently track empty kilometres systematically but say it's a constant concern. The company strives to ensure vehicles are loaded both outbound and on return trips, with empty runs being rare and usually tied to breakdowns or specific pickup needs.

## Positive financial performance and outlook

M&M Transportes reported approximately €3,2M in revenue in 2024. The business has continued to grow steadily, as evidenced by its increasing profits and steadily improving cash flow. "Our strategy is built on financial stability and constant reinvestment in operations," state the directors.

## Looking ahead to 2026: Trends and recommendations

There is a cautious outlook for the upcoming years, particularly regarding decarbonization and sustainability. According to the directors, the long-haul transportation industry is not yet technologically prepared for a significant shift. "There's still a lack of effective vehicle options at competitive prices, and the current operating conditions are not yet favourable compared to diesel."

They advocate for stronger government action, real incentives for purchasing eco-friendly vehicles, toll exemptions, and investment in refuelling infrastructure. They also call for shippers to begin prioritizing alternative fuels as a selection criteria when choosing service providers.

"Even today, transport price remains the main deciding factor in most tenders, not the type of fuel used," they point out. However, they are confident that the market will gradually evolve as environmental concerns gain prominence in business decisions.

## A realistic perspective on sustainability

For other carriers beginning their journey toward decarbonization, the M&M directors recommend a balanced approach: "It's essential to take environmental responsibility seriously, but it's equally important to demand the conditions that make this transition feasible, whether from the State, manufacturers, or customers."

Their LNG experience has demonstrated that sustainability initiatives can become financially unfeasible in the absence of sufficient backing. However, M&M Transportes is still dedicated to lowering its carbon footprint and is actively looking for workable and efficient future solutions.




Company name:

**Manuel & Miranda Transportes, Lda.**

Year of foundation:

**1999**

Fleet size:

**31** heavy vehicles

**6** light vehicles

Usage of Eurowag products by type:

Fuel cards

Diesel

VAT refund

Turnover 2024:

**€3.21m**

Number of employees:

**41**

Founder/CEO:

**Manuel Pinheiro Martins and Maria Amélia**

Geographical scope:

**Iberia**

# Slovakia

# Slovakia: Market overview and outlook

Commercial road transport in Slovakia entered 2025 under the weight of a mixed legacy. 2024 closed with only a modest EU-wide increase in tonne-kilometres (+0.6%), a sign of stagnation rather than robust growth. For Slovak carriers, this fragile backdrop shaped the way 2025 began: with weak demand, rising costs, and new regulatory hurdles.

By the end of the second quarter of 2025, Slovakia's Statistical Office confirmed what many operators already felt: freight volumes had slipped to 51.8 million tonnes (-4.7% y/y), while freight performance fell to 9.1 billion tonne-kilometres (-9.1% y/y). On a cumulative basis, the first half of 2025 was down 7.5% in tonnes and 9.4% in performance compared with the same period in 2024. Road transport volumes dipped by less than one percent, but shorter hauls and weaker international demand meant revenues declined more sharply.

After a wave of renewals in 2023 and 2024, new truck registrations in Slovakia fell by around 16% in H1 2025. Diesel engines remained the overwhelming choice (≈94% of new EU trucks),, while the share of newly-registered electric trucks edged up to just 3.6%. This offered little immediate relief from diesel volatility but signals the slow start of a fleet transition.

Diesel prices surged and dipped throughout the summer, forcing carriers to adjust surcharges frequently. On 1 July 2025, Slovakia also introduced $CO_2$-based toll classes. Unless vehicles were reclassified on the national toll portal emyto.sk, they defaulted to the highest toll rate, creating significant new costs for unprepared operators.

The IRU warns of persistent driver shortages. Slovakia reflects this: an ageing workforce, few young entrants, and low female participation. The demand slowdown has hidden the issue temporarily, but operators know the problem will resurface when the market bounces back.

The rest of 2025 promises more stability than growth. Freight volumes are unlikely to rebound strongly, fuel volatility will continue, and toll differentiation will gradually reward cleaner fleets.

Investment will be selective, focused on utilization, while carriers seek ways to attract drivers. 2025 is becoming a year of consolidation and adjustment.

In short, the story of 2025 is one of adaptation. Slovak road transport is adjusting to weaker demand, volatile costs, and a new tolling regime, while preparing for a future that demands both efficiency and resilience.

**Miroslav Novák**
Country Manager for
Slovak & Czech markets

## New commercial vehicle registrations (Q1-Q3 2025)

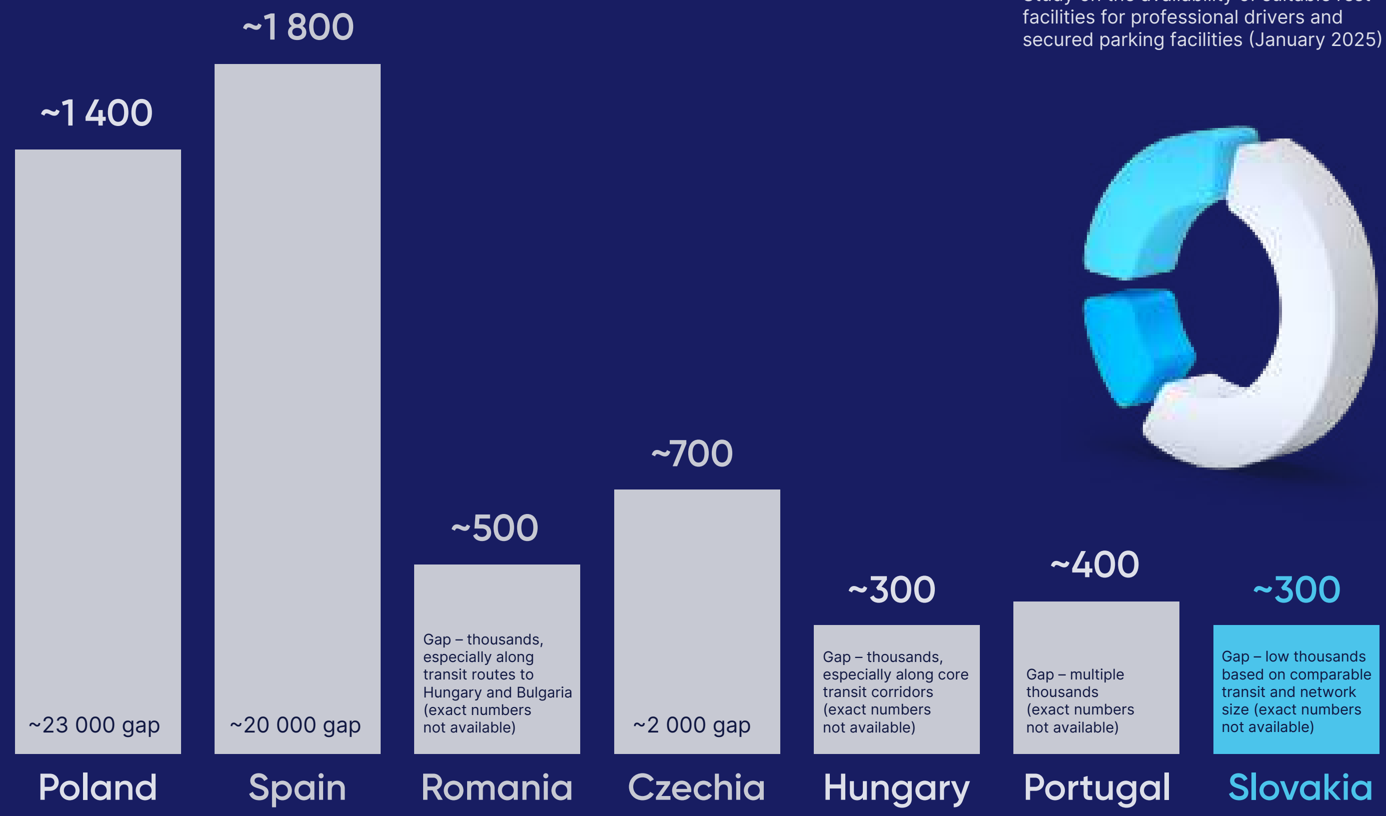

Source: ACEA

## Certified parking spots in 2025 in European Union

in millions of tonne-kilometers

Sources:
Published overviews of available parking locations for trucks certified by EU SSTPA standard, ESPORG, and TAPA

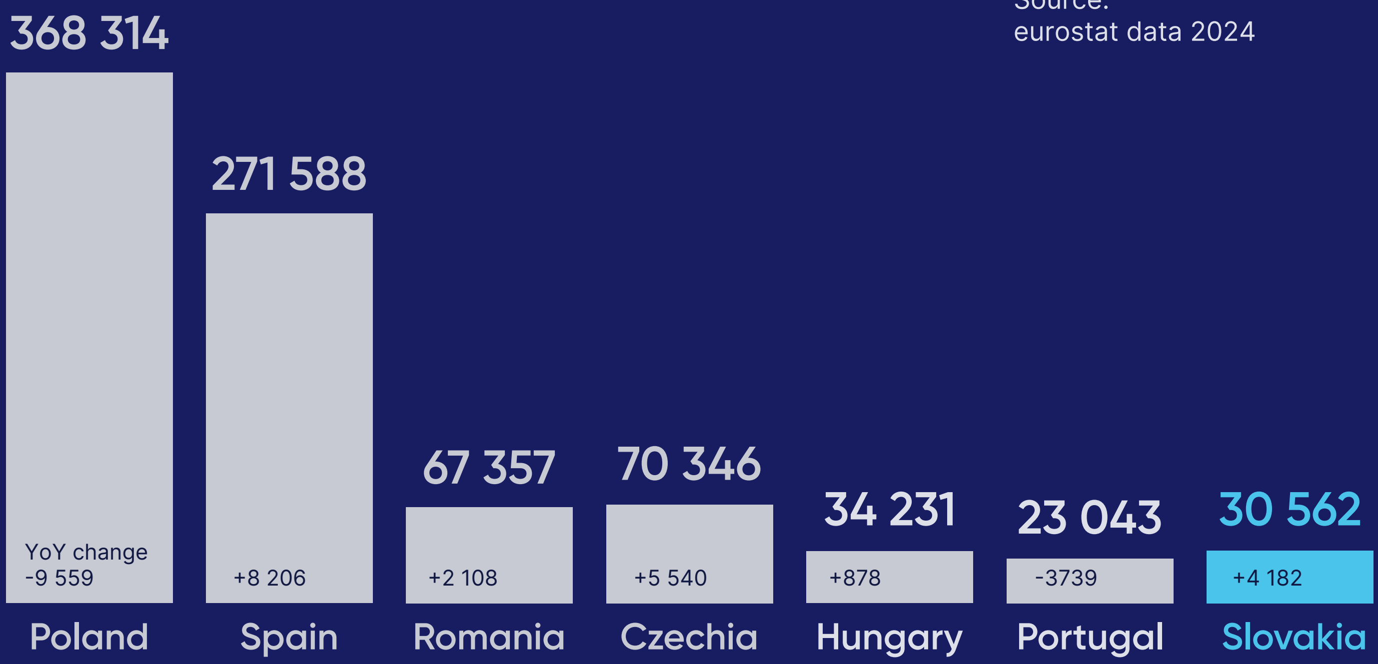
Study on the availability of suitable rest facilities for professional drivers and secured parking facilities (January 2025)




## Road freight volume in 2024*

* in millions of tonne-kilometers

Source:
eurostat data 2024




## Market players

**Market Leader**
**COMEXTRANS, s. r. o.**

**Tech Trailblazer**
**TOPNAD, a. s.**

**Sustainability Star**
**Schnellecke Transport Slovakia, s. r. o.**

# Market Leader

Company:
COMEXTRANS, s. r. o.
Country: Slovakia


COMEXTRANS SLOVAKIA

# COMEXTRANS: Transporting goods makes us happy

**From a modest site in Ilava, dozens of trucks set off for destinations across the European Union. The blue trucks have been doing this for over 30 years – in that time, COMEXTRANS has earned a reputation as a reliable haulier unafraid of any challenge. "We always want to keep improving," explains Rudolf Holba, one of the company's co-owners, describing their recipe for success. Today, COMEXTRANS is among the leaders of the Slovak market.**


The company's humble journey began in 1993 when two brothers bought a single Czechoslovak-made vehicle and started a business in international road haulage.

"From the very beginning, I had a good feeling about it," Holba says when recalling the company's first steps on the market. Business thrived. Just a year later, the fleet expanded with two additional LIAZ trucks, and the following year, MAN trucks were added.

The growth of the transportation market and Slovakia's addition to the EU were major milestones. At that point, COMEXTRANS held seven licenses for international road transport. The next five years marked a period of rapid development. The fleet grew from seven to nearly forty trucks.

Even the economic crisis of 2009–2010 didn't slow the company down. During that time, it didn't terminate any leasing agreements; on the contrary, it expanded its capacities. According to the co-owner, a responsible and serious approach with a focus on stability proved its worth.


## In addition to standard tools, the company relies on a dispatch system from Eurowag.

### A versatile fleet

Today, 80 trucks depart from Ilava to serve Slovak and European routes. “We operate fifty standard curtain-side trailers and thirty refrigerated trailers for food transport,” specifies the company head.

COMEXTRANS’s most frequent clients are engineering companies, with a significant share of work in the automotive sector. “And we recently won a major contract in the food industry as well,” adds Holba.

The company’s scope is broad – they accept almost any type of transport except hazardous goods, which require special permits and are therefore not their specialty.

### Services beyond transport

In addition to haulage, the company also provides logistics services. On a 300-square-meter site, they can store goods for customers, and a 3-ton forklift is available on-site, making transshipment easy. If needed, COMEXTRANS can arrange a higher-capacity forklift or a crane.

The company also services both trucks and passenger vehicles and offers tire services.

“While we also handle logistics and other services, that’s not our core business. We primarily concentrate on transport,” explains the co-owner.

### Investing in new vehicles

Sustainability in transport is also a priority for this Považie-based company, though its head admits that achieving it under current Slovak conditions is challenging.

A few years ago, the company decided to completely renew its fleet. “We try not to operate old vehicles. Compared to new ones, their emissions are several times higher,” says Holba. By “new,” he refers both to their age and their technological advancement.

The average fleet age ranges from 2.9 to 3.1 years old. The company replaces ten to twelve vehicles annually, depending on market conditions. The trucks are constantly maintained in top condition, following authorized service procedures.

"Currently, we operate only Euro 6 and Euro 5 EEV class vehicles. For international transport, we use exclusively Euro 6 trucks, which are currently the most environmentally friendly vehicles on the market," stresses Holba.

And it's not just the trucks being upgraded – two years ago, COMEXTRANS also completely replaced its refrigerated trailers with the most efficient Chereau models.
The company also uses photovoltaics.

### Alternative fuels face hurdles

The company has also explored alternative fuels.
They operated a CNG-powered truck, though the company head admits it's hardly worthwhile in Slovakia. The same applied to HVO. While sustainable biofuel is a promising concept, without incentives it remained much more expensive than standard diesel and therefore didn't make economic sense for them.

Additionally, they don't currently feel pressure from customers to make the switch. "In terms of decarbonization and sustainability, clients aren't demanding anything extra from us. We monitor developments closely, but for example, we don't plan to purchase an electric truck anytime soon," he explains.

However, the company carefully tracks empty mileage, aiming to reduce not only costs but also its environmental footprint. "We have all of that monitored. We use our own system," says Holba.

COMEXTRANS also invests in the latest technologies to boost efficiency, improve tracking, and optimize routes. In addition to standard tools, the company relies on a dispatch system from Eurowag. "It makes us more flexible and is also cheaper than the system we used before," he says.

They are also planning a transition to the EETS toll system, again intending to use Eurowag's EVA on-board units. COMEXTRANS also cooperates with the Czech multinational company in the fuel segment, using its wide acceptance network for refueling in the Czech Republic.

### Supporting drivers

Innovation also helps the company improve overall service quality for its customers.

This is what the co-owner is most proud of, emphasizing that the company invests in employee training and development. Closely related is a challenge faced by many Slovak hauliers – a shortage of drivers.

The reasons are complex: the average driver age is rising, and few young people choose this demanding profession, which is both physically and mentally exhausting and requires long periods away from home.

At COMEXTRANS, they try to accommodate drivers. They offer several types of transport where drivers can be home daily, provide training support, and add various bonuses and benefits.

This helps the company gain the flexibility it needs to respond to market changes. COMEXTRANS wants to be ready. "We definitely have to prepare for increased competition in the near future. To succeed, we need fewer empty miles, innovation, and investment in vehicles. I don't expect revolutionary changes, but on the other hand, we have to stay ready," says Holba. According to him, this also means providing more comprehensive services.

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**Currently, we operate only Euro 6 and Euro 5 EEV class vehicles. For international transport, we use exclusively Euro 6 trucks, which are currently the most environmentally friendly vehicles on the market.**

Company name:

**COMEXTRANS, s.r.o.**

Year of foundation:

**1993**

Fleet size:

**80**

Usage of Eurowag products by type:

Fuels

Toll

Telematics

Revenue 2024:

**€14.76m**

Number of employees:

**<149**

Founder/CEO:

**Rudolf Holba**

Geographical scope:

**European Union**

# Tech Trailblazer

Company:
TOPNAD, a. s.
Country: Slovakia


# TOPNAD: Thanks to technology, we can be both efficient and eco-friendly

TOPNAD
TRANSPORT - LOGISTICS

Artificial intelligence helps select the optimal route, work processes are automatically interconnected, and administration is handled by their own software. Without modern tools, the transport company TOPNAD, based in Topoľčany, cannot imagine its operations. "In the field of transport and logistics, it's essential to keep up with developments," explains transport director Richard Jančovič, outlining why the company is open to innovation. "We are close to technology – we even have our own IT department where we create in-house solutions," he adds.

One striking example of how much the transport sector has evolved in recent years is route planning. "**Every week we manage around forty to fifty transports, each involving between one and fifteen delivery points. A long time ago, a colleague used to do this manually.** She had to input all the locations into Google Maps and then rearrange the routes by hand to achieve the fewest kilometers. **Today, with artificial intelligence, it's a matter of seconds**," Jančovič explains.

TOPNAD has been testing algorithms for finding ideal routes for quite some time. "Although the solution still requires human oversight, today it's far more accurate and reliable thanks to AI," the transport director notes with satisfaction.

The system not only suggests the shortest route, but also considers other factors. Based on the plan, the company can even organize how cargo is distributed inside the trailer to minimize unloading time.

It is also crucial that a truck completes its route in a location where it can most efficiently continue with the next transport. "**There's no point in having a route fifty kilometers shorter if you end up in a dead zone and must drive empty to the next loading point**," he explains.


The system has now learned which locations are key for TOPNAD and prioritizes them to make journeys as efficient as possible. The company estimates that **innovations in planning alone have saved the equivalent workload of two to three employees**.

## Transport managed by own software

Thanks to modern digital solutions, the company has almost completely eliminated empty kilometers — one of the key performance indicators TOPNAD tracks. "It's not just a tool for efficiency but also for ecology," says Jančovič, noting that they maintain detailed data on empty mileage both domestically and abroad.

The company's technological ace is its proprietary transport management software. All core activities of the company are integrated into it, and it is also connected to customers.

This integration simplifies tasks such as invoicing and payment processing. Automatic links between fuel cards, toll systems, and accounting save the company countless hours of manual work each month.

Digital tools also provide detailed insight into the movement of individual drivers. They record consumption data, monitor idle time, and evaluate driver performance — all without any manual intervention.

The system automatically generates monthly reports that can be reviewed by vehicle, route, or customer.

## Ambitious digital plans

The software is connected via web dispatch and Sygic navigation from Eurowag to tablets in each vehicle. These devices handle all communication between dispatch and trucks on the road. Advanced telematics using Eurowag's EVA onboard units completes the setup.

TOPNAD has also begun using an electronic data exchange system with some customers for faster and more secure transfer of orders and invoices.

The company is currently working on implementing eCMR. However, this is a tougher challenge since the electronic consignment note requires cooperation among dozens of other companies. "It needs to be set up along the entire supply chain, and our main German clients have hundreds of their own customers. Implementation is therefore quite complex," Jančovič explains.

Meanwhile, TOPNAD has embarked on another digitization project. "We deal with a huge number of delivery notes. For every transported sofa, there's a delivery note, so with one shipment the driver may have a hundred of them," Jančovič says. **All these "papers" must be carried by the driver and stamped at each unloading point. Eventually, they must be brought back to company headquarters.**

"Here, we automatically scan the paper documentation and include it in digital records, but we would like to move the entire process onto tablets. Ideally, we would receive delivery notes electronically at loading and customers would sign them electronically as well," the transport director explains.

## A company with tradition

It took many years for the company to reach its current technological level. In a way, TOPNAD's roots go back to 1949, when the state transport company ČSAD was established in Topoľčany.

The current company dates its origins to 1995, when the former state enterprise was transformed into a limited liability company and later into a joint-stock company. The company grew quickly, expanding both in size and in the scope of its services.

Today it provides comprehensive services in goods movement. In addition to transport, it is active in logistics, operating its own warehouses covering 20,000 square meters, leasing another 10,000 square meters, and currently working on acquiring an additional facility with a 40,000-square-meter capacity.

Alongside transport, TOPNAD offers bonded warehouse and customs clearance services.

However, transport remains its core business. Today, 70 trucks with mega trailers and about twenty tandem sets operate under the TOPNAD banner. The average fleet age is under five years. Trucks used for customer transport are younger, while part of the fleet serving internal logistics between business partners and warehouses raises the overall average slightly.

TOPNAD's customer base is broad. Given the industrial history of the Topoľčany region, the company specializes in furniture transport. In addition, its trailers often carry medical and surgical supplies, automotive and engineering products, and many other goods.

Although primarily a road haulier, TOPNAD also manages air and sea freight.

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**Tablets in each vehicle handle all communication between dispatch and trucks on the road. Advanced telematics using Eurowag's EVA onboard units completes the setup.**

## Stable performance

In recent years, the company has managed to stabilize revenue and profits at levels that, despite tough conditions, allow for growth and the strengthening of operations. Like others in the sector, TOPNAD had to adopt various cost-saving measures in response to rising expenses for fuel, tolls, wages, and fleet maintenance.

For the Topoľčany-based haulier, innovation — through automation, digitization, and operational optimization — is the key solution.

Besides rising costs, TOPNAD identifies the driver shortage as another major challenge. The company seeks to retain experienced drivers for as long as possible and attract new ones with stability, a calm work environment, and prospects for the future. “Recruitment of drivers from third countries, simplifying state-level administration, and improving working conditions will be important topics,” predicts Jančovič.

Increases in toll rates by 40%, fuel costs, transaction tax, and disproportionate tax and levy burdens in Slovakia compared to neighboring countries are putting Slovak transport companies under significant pressure.

This also affects decarbonization and sustainability efforts. TOPNAD’s transport director admits that customers currently prioritize price over green solutions. Nevertheless, the company sees alternative fuels and environmental topics as necessary and inevitable in transport.

As a technological leader, TOPNAD constantly seeks balance to remain efficient and competitive. Its sustainability efforts therefore focus on practical measures — renewing the fleet with newer, lower-emission models, using advanced processes to reduce unnecessary mileage and idle time, and training drivers in economical driving.

The company recently installed photovoltaic panels on its warehouses and service building. “In the long term, we would like to deploy vehicles powered by alternative fuels as well. However, readiness of infrastructure and state support through tax breaks or subsidies will be decisive,” concludes Jančovič.


> **For the Topoľčany-based haulier, innovation – through automation, digitization, and operational optimization – is the key solution.**

Company name:

**TOPNAD, a.s.**

Year of foundation:

**1995**

Fleet size:

**90**

Revenue 2024:

**€15.78m**

Number of employees:

**<149**

Usage of Eurowag products by type:

- Fuels
- Toll
- Telematics
- Navigation

Founder/CEO:

**Ing. Pavol Jančovič**

Geographical scope:

**Europe**

**specializing on German speaking countries**


# Sustainability Star

Company: Schnellecke Transport Slovakia, s. r. o.
Country: Slovakia

# Schnellecke: With HVO, we get higher performance and lower consumption

**Within the group, they were pioneers in LNG vehicles, but today they swear by HVO. For Schnellecke Transport Slovakia, sustainability is not just a marketing buzzword. "It's the right thing to do, and at the same time, it also makes commercial sense," says Gabriel Molnár, who is responsible for the vehicle fleet at the company.**


The company realized very early on how important it is to care about the environment. The Slovak branch was given the opportunity eight years ago to test new technologies aimed at reducing its carbon footprint and gaining valuable experience in this field.

## Slovak pioneers

Schnellecke Transport Slovakia thus became one of the first branches of this multinational group to test LNG vehicles. After initial concerns – after all, who would want to sit on top of two huge gas tanks – the skepticism quickly disappeared. Two pilot trucks quickly became part of the fleet. It turned out to be safe and, at that time, efficient technology. Based on this experience, gas-powered trucks were also introduced into the fleets of other branches of the group.

However, the situation has changed since. Various subsidy programs that had favored eco-friendly vehicles and, for example, exempted them from tolls on German roads, were discontinued.

The company therefore looked for other ways to remain true to its ecological mindset while still making economic sense. In cooperation with the University of Applied Sciences in Zwickau, Schnellecke became the first company to participate in testing electric trucks together with Porsche and Volkswagen. The aim was to test electric trucks not only within the factory premises in Zwickau and Leipzig, but also on public roads by the end of 2018. With the introduction of electric mobility for trucks, the partners aimed to become industry leaders and to expand the pilot operation into broader practical use.

## Looks like water

Today's economic climate is not favorable for sustainability though. Customers are pushing transport rates as low as possible. Some solutions are therefore no longer competitive – for example, the purchase price of an LNG truck is tens of thousands of euros higher than that of a standard diesel vehicle.

Another pilot project offered a possible solution. The company Schnellecke allocated an older vehicle to test HVO100 fuel. The driver behind the wheel happened to have been named "Rookie of the Year" the previous year in the MAN League, a competition that rewards efficient driving skills.

This combination turned out to be a winning one. "Fuel consumption dropped from 27 to 23 liters. There was also an empirical improvement: the driver reported higher vehicle performance and better driving characteristics," Molnár notes. An advantage is that switching to HVO100 requires no upfront investment. All truck manufacturers have been adapting their vehicles since 2008 to run on both regular diesel and HVO.

No special staff training is needed either – this alternative fuel can be pumped at a station from a regular pump just like any other. Unlike LNG, which is an extremely cooled gas requiring safety precautions during refueling, HVO is a conventional fuel.

At first glance, it's even indistinguishable from water – it's colorless and odorless.

## Strong cooperation with Eurowag

Schnellecke Transport vehicles refuel HVO at Eurowag stations, where the company has found strong support. Their cooperation with Eurowag also extends to other areas. "Previously, we used other suppliers for both fuel and toll payments. But Eurowag pleasantly surprised us. Its acceptance network is comparable to that of major competitors," says Molnár.

He especially appreciates the high-level cooperation and the fact that no deposit was required at the start. "We use their services for both fuel and tolls. We value that many fueling stations are self-service, but at the same time safe thanks to video surveillance," he adds.

## Close to the car plant

The name Schnellecke is no stranger on European roads. The company was founded in 1939 as a forwarder and furniture transporter in a place called Stadt des KdF-Wagens bei Fallersleben (City of the KdF Car near Fallersleben). The settlement housed workers for the newly established Volkswagen plant. After the war, the city was renamed Wolfsburg and began to grow rapidly. The family forwarding and logistics company grew alongside it.

Schnellecke has become a global provider of logistics services. Today, the company operates in thirteen countries worldwide. It specializes primarily in automotive logistics, contract logistics, and road transportation. It delivers comprehensive solutions ranging from supplying production lines, through warehousing and sequencing of components, to the distribution of finished vehicles.

Thanks to innovation, digitalization, and a strong focus on sustainability, Schnellecke has been a long-standing strategic partner of leading automobile manufacturers and their suppliers.

In Slovakia, Schnellecke's distinctive green trucks arrived in 1999. Just as the German headquarters is located next to Volkswagen in Wolfsburg, in Slovakia the company also chose to operate close to its customers, directly at the car manufacturer in Devínska Nová Ves and near automotive suppliers in Lozorno. Nine years later, the company split. While the original firm focuses on logistics, the core business of Schnellecke Transport, based in Lozorno, is transport and forwarding activities with an international scope.

Approximately 60% of the transport volume is tied to the automotive industry. After the crisis, management focused on diversification, so today the company's portfolio also includes major customers from the wood-processing, metallurgical, glass, paper, textile, as well as defense industries and FMCG.

With its own resources, Schnellecke Slovakia mainly provides transport of solid and palletized goods. As freight forwarders, however, they can offer a wide range of transport services.

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**Eurowag acceptance network is comparable to that of major competitors. We value that many fueling stations are self-service.**

## A young fleet

Sustainability is also reflected in the composition of the vehicle fleet. At Schnellecke, individual vehicles are renewed every 48 months. Typically, 15 to 18 trucks in the company's green livery operate from Lozorno; currently, due to the renewal process, there are twelve on the roads, none older than two years.

Trucks with curtain-side trailers operate throughout Europe, most frequently in Germany.

Several customers already require carbon footprint reports. At Schnellecke, they therefore have a detailed system at headquarters that tracks this aspect of transport. In terms of sustainability, the company has set goals such as eliminating empty mileage. Transport flows are organized so that vehicles run empty as little as possible – ideally loading new goods immediately after unloading.

The company also pays close attention to details such as individual driver efficiency. It uses a system connected directly to the vehicle's control unit that monitors driver behavior. If, for example, they brake unnecessarily too often, it alerts them. The system monitors deviations and can detect if something unusual is happening.

Schnellecke acknowledges that sustainability efforts could go even further. The biggest obstacle, however, is the economic viability of such solutions. Additional challenges include a lack of infrastructure and legislation that lags behind the needs of the industry.

## Drivers matter

For this green haulier, environmental sustainability is only one letter in ESG. Equally important to the company is responsibility in other areas. The Slovak branch, for example, takes care to ensure that drivers have the best possible working conditions.

"We try, for instance, **to assign each driver their own vehicle so they don't have to unpack and move between trips. We place great emphasis on the most modern equipment possible, and safety is our top priority,**" says the fleet manager of Schnellecke Transport Slovakia.

Schnellecke Transport Slovakia thus proves that sustainable transport can be efficient, economical, and friendly to both people and the environment.

> **It uses a system connected directly to the vehicle's control unit that monitors driver behavior. If, for example, they brake unnecessarily too often, it alerts them.**

Company name:

**Schnellecke Transport Slovakia, s.r.o.**

Year of foundation:

**2008**

Fleet size:

**12**

Usage of Eurowag products by type:

Fuels

Toll

Revenue 2024:

**€18.36m**

Number of employees:

**25-49**

Founder/CEO:

**Thomas Lammer/ Elena Adamcová**

Geographical scope:

**Europe**

**Francesco Nazzarri**
Chief Commercial
Officer Eurowag

# Industry predictions for 2026

**As the European Commercial Road Transport sector enters 2026, focus turns to the key forces shaping its direction. Based on current forecasts, regulations, and technological advances, these insights highlight the core opportunities and challenges driving the industry's transformation.**

### 1. The market will grow and become more resilient

With stricter $CO_2$ emission targets, we can expect an increase in the adoption of electric, bioLNG, and HVO trucks, all of which are becoming more sought after. Major logistics firms are expected to continue converting substantial parts of their fleets to low and zero-emission vehicles.

### 2. Digitalization and technology integration as basic conditions for competitiveness

Advanced digital logistics platforms, real-time tracking, route optimization, and intelligent transportation systems are rapidly becoming mainstream. In 2026, 49.77 million telematics units in Europe are expected to be in use, representing annual growth of over 15%. Investments in connected fleet management and automation are fundamental for staying competitive.

### 3. Sustainability as a regulatory mandate—not just a business choice

EU and state-level incentives for green freight corridors and urban emissions zones are driving fleet upgrades and infrastructure investments in charging and alternative fuel networks. The electric truck market is projected to grow almost five times by 2030 (€1.5 bn in 2025 to €7.8bn by 2030).

### 4. The growing e-commerce push on the last-mile demand

Growth in e-commerce keeps pushing up demand for reliable, efficient, and flexible road freight—particularly for last-mile and urban delivery, forecasted to reach €93.8bn by 2033.

### 5. Driver shortages require new investments and automation

Driver shortages remain the most acute operational challenge, with Europe projected to face a crisis of up to 400k unfilled driving positions by 2026. The shortage drives wage inflation, increases operational costs, and creates constraints for capacity expansion.

### 6. Pressure on costs and operational efficiency are key

Regulatory changes such as the EU Mobility Package and national $CO_2$-based road tolls are reshaping pricing and market structure. Despite significant growth of the EU market value, rising tolls and regulatory costs are squeezing margins for operators, especially in Central and Eastern Europe.

## 7. Streamlined technologies and infrastructure are essential for overcoming bottlenecks

From 2026 onward, $CO_2$-based tolls will be mandatory for heavy-duty vehicles, and digital documentation is increasingly required for customs. Upgrades in road infrastructure, modernization of customs processes, and harmonization are becoming critical.

These predictions reflect a highly transformative period for the CRT industry as it embraces sustainability, new technological advancements, and enhanced regulatory compliance.

We invite you to share your perspectives—do you recognize these trends in the industry?

Join the discussion on our LinkedIn page and let us know your views.

### Data sources:

Eurowag's business analysis, recent industry reports and market analyses, which provide insights into market development, projected growth and regulatory challenges.

- European Freight Market 2026 - Trends, Costs, Challenges
- Europe Road Freight Transportation Market 2026: Size, Growth Outlook & Automation Trends
- European-Road-Freight-Market-Size-Forecasts-2021-2026.pdf
- Logistics and transport sector reforms for the future 2025-2026
- Mid-Year-ERFT-Market-Forecasts-for-2024-2025-whitepaper.pdf

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