



Dear Client and Partner

Diesel is one of the most significant cost components in European road freight operations and remains a key driver of overall transport economics.

According to recent European industry analyses (IRU, Transport Intelligence, Upply), fuel typically accounts for approximately **25–35% of total road freight costs in Europe** under normal market conditions. (trans-road.com)

In periods of higher fuel prices or long-haul operations, this share can increase further, making diesel one of the largest or second-largest cost elements in trucking. Industry data from the International Road Transport Union (IRU) also highlights that fuel and energy costs represent a **significant and volatile share of total operating expenses**, directly influencing freight rates across Europe. ([The Loadstar](https://www.loadstar.com))

For context, the typical cost structure in European road transport is broadly distributed as follows:

- Driver wages: ~25–35%
- Fuel (diesel): ~25–35%
- Vehicle financing/depreciation: ~10–20%
- Maintenance, tolls, insurance, and administration: ~10–20%

It is also worth noting that in some European markets, **road tolls are becoming comparable to—or even exceeding—fuel costs**, reflecting increasing regulatory and infrastructure-related expenses. ([iru.org](https://www.iru.org))

In summary, diesel remains one of the primary cost drivers in European road freight, and even small fluctuations in fuel prices or consumption can have a direct and significant impact on overall profitability and transport pricing.

Sources:

- IRU / Upply / Transport Intelligence – European Road Freight Rate Benchmark
- Transroad (2026) – Fuel share of freight costs in Europe
- IRU market insights on European freight cost drivers and fuel impact

Please let me know if you would like a tailored calculation based on your specific transport flows.

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