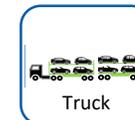
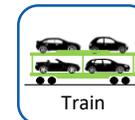




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# ECG Secretariat report

Mike Sturgeon



# New members of the team



**Andreea Maria Serbu**



**Alix Stamp**

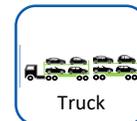
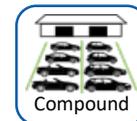
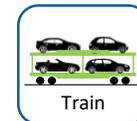




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# Confidence & Cost Trends Survey

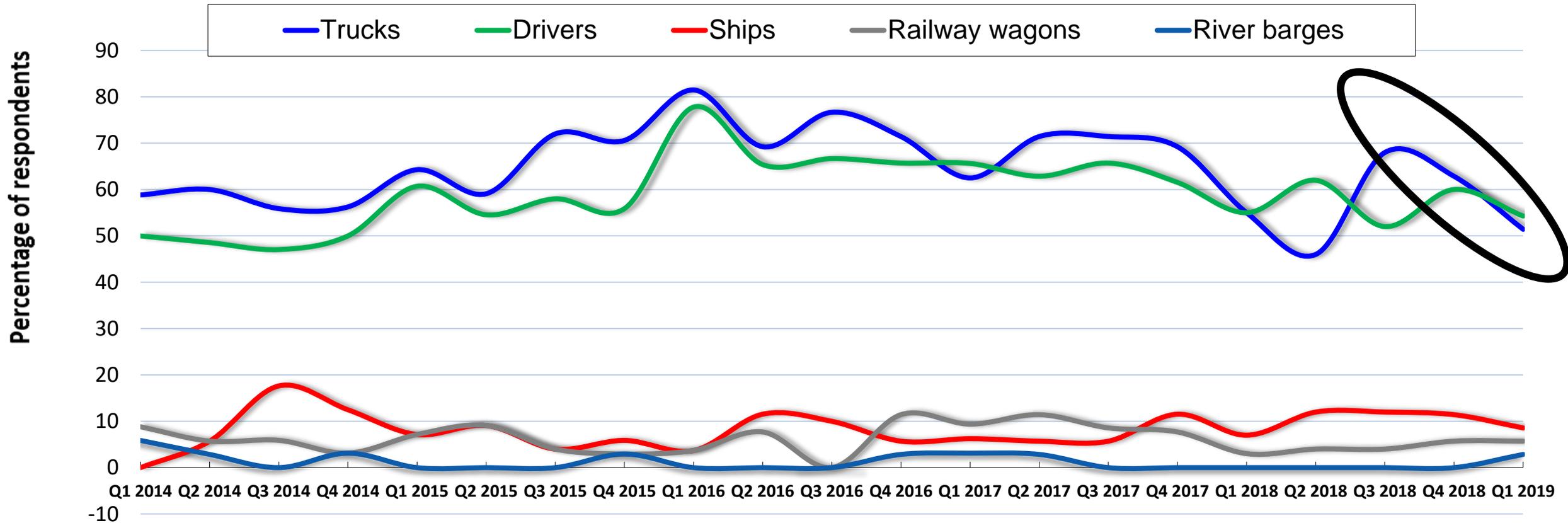
Q1 2010 – Q1 2019



# 1. Investment (I)



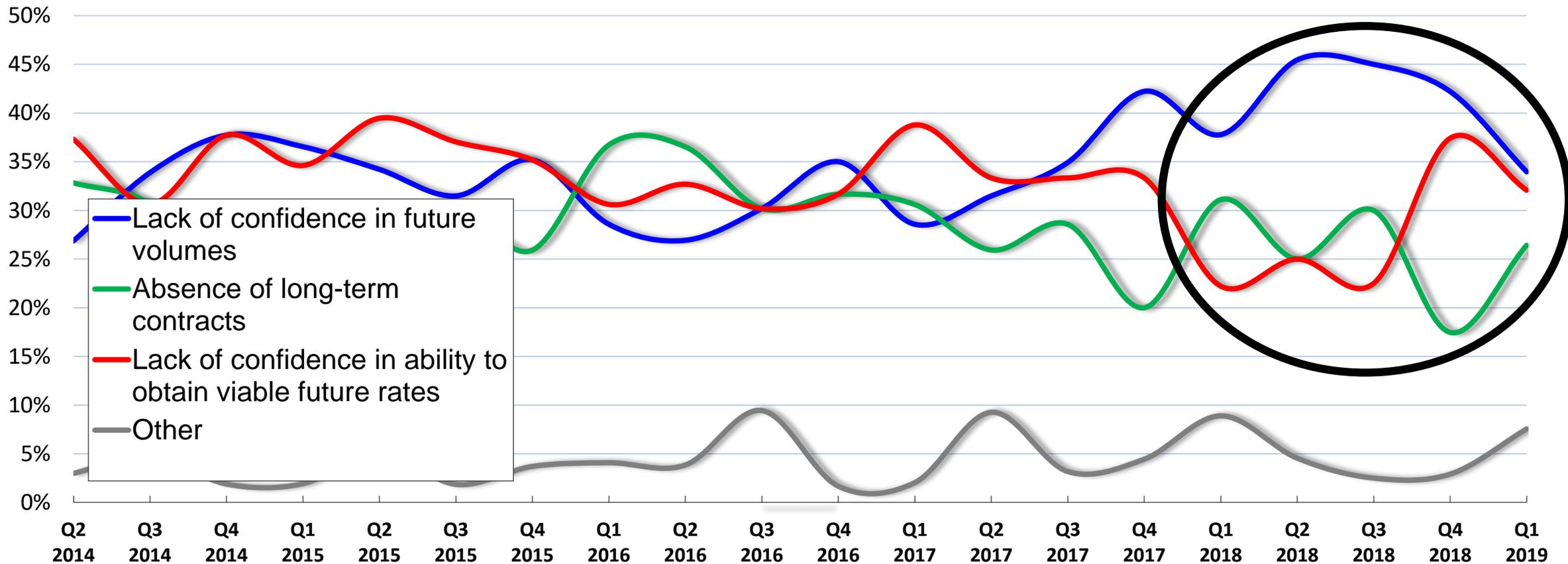
For the next six months, will you be investing in any of the following?



# 1. Investment (II)



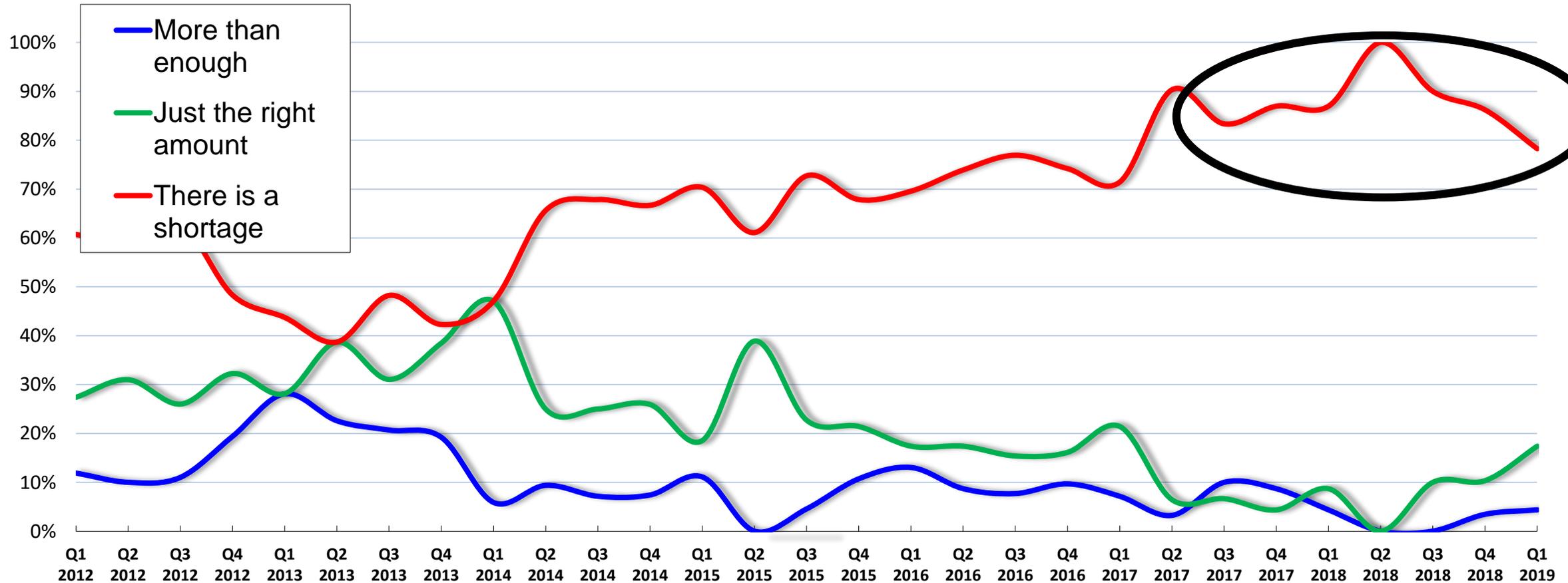
## What other factors are likely to restrict investments?



## 2. Labour supply



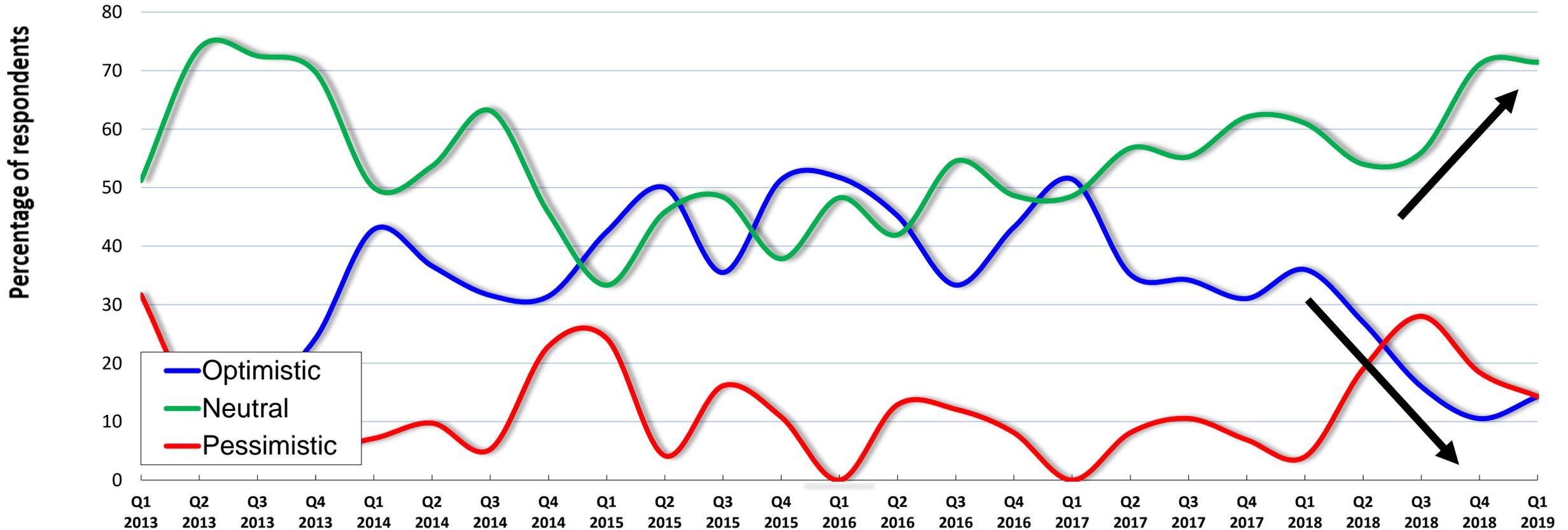
### Availability of qualified truck drivers



# 3. Business optimism



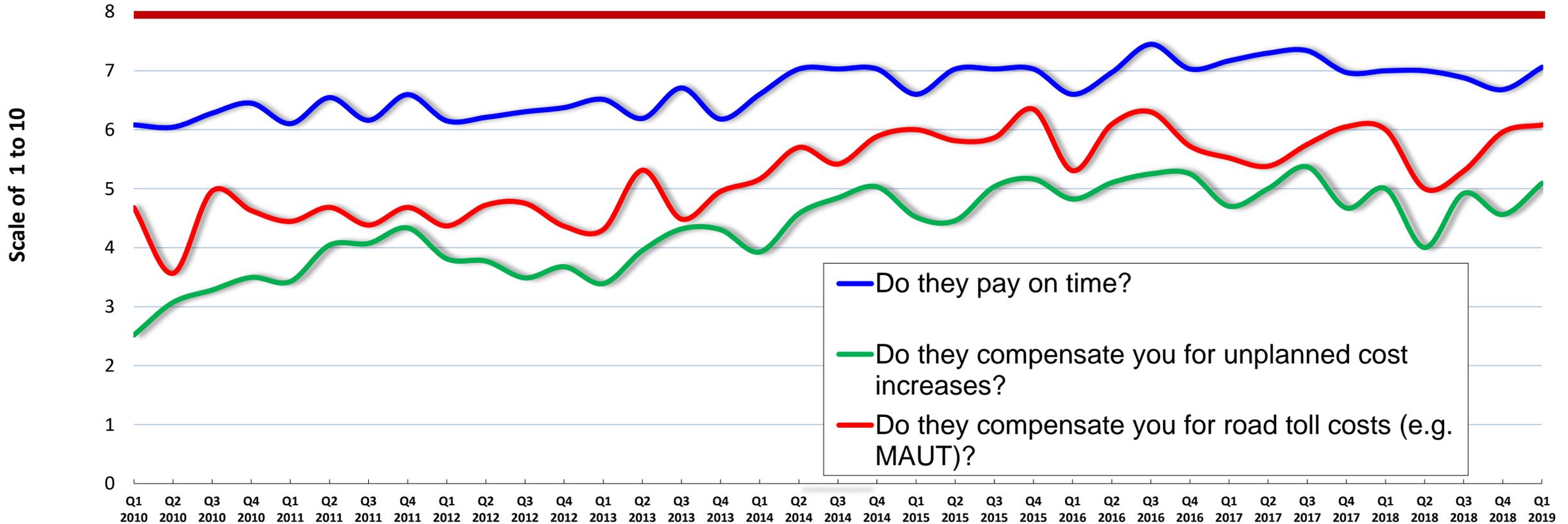
How do you feel about the next six months?



# 4. Customer / Supplier Relationship



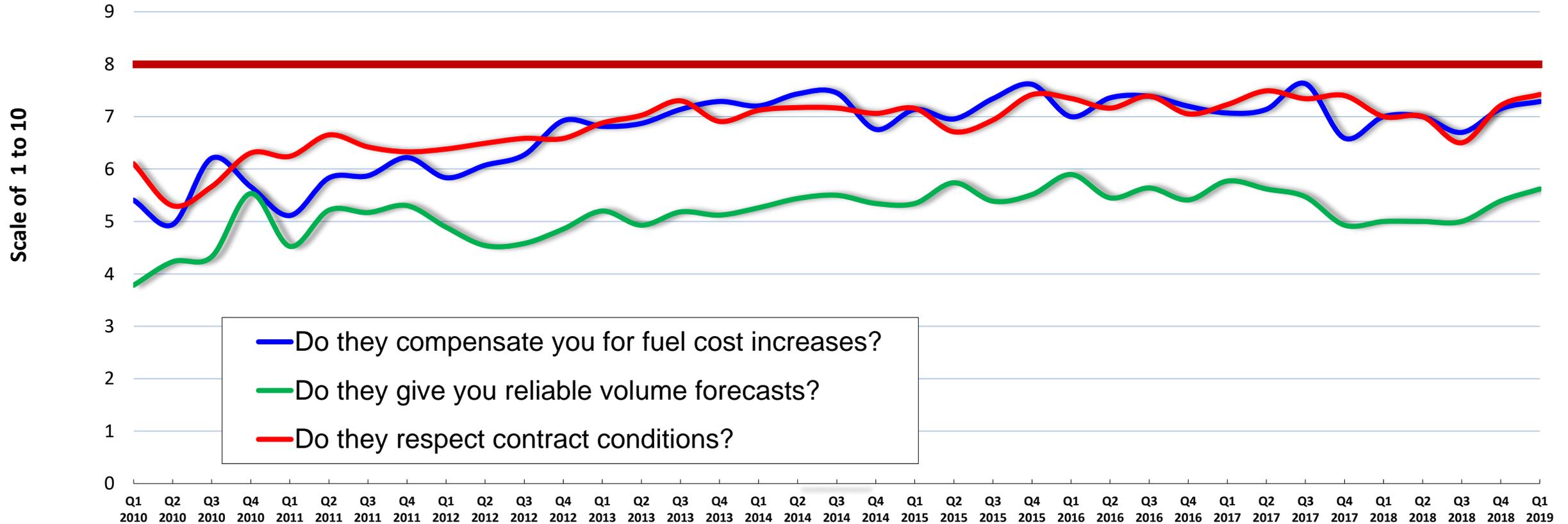
## Customer/ Supplier Relationship Index 1



# 4. Customer / Supplier Relationship



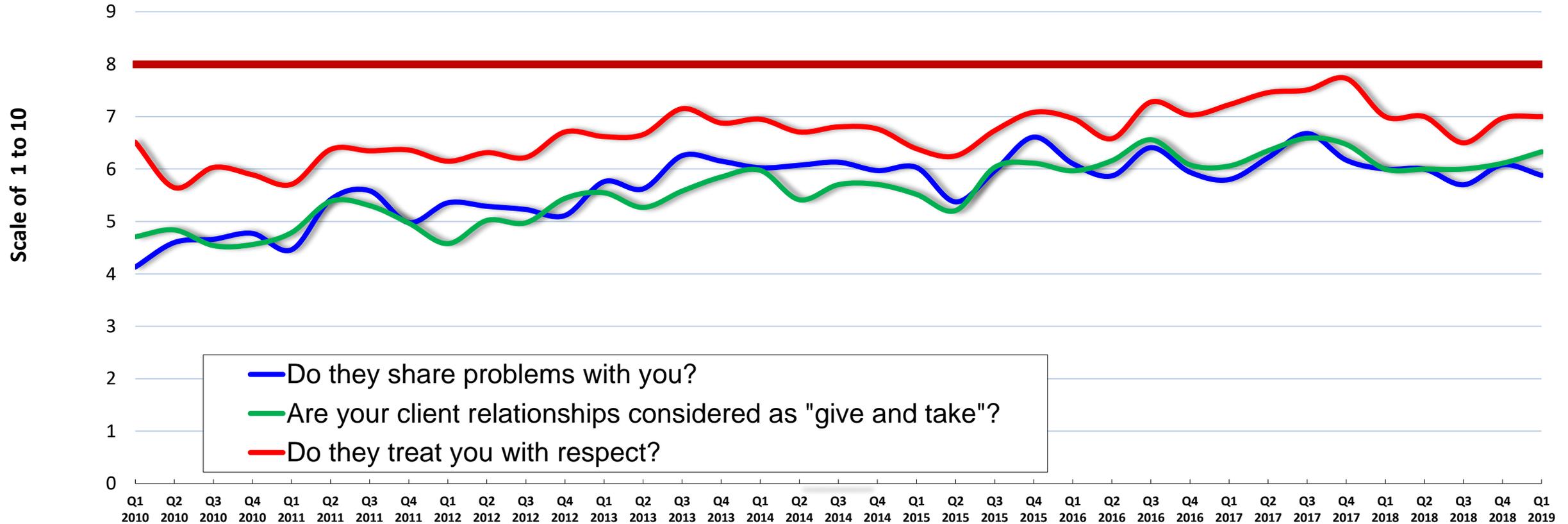
## Customer / Supplier Relationship Index 2



# 4. Customer / Supplier Relationship



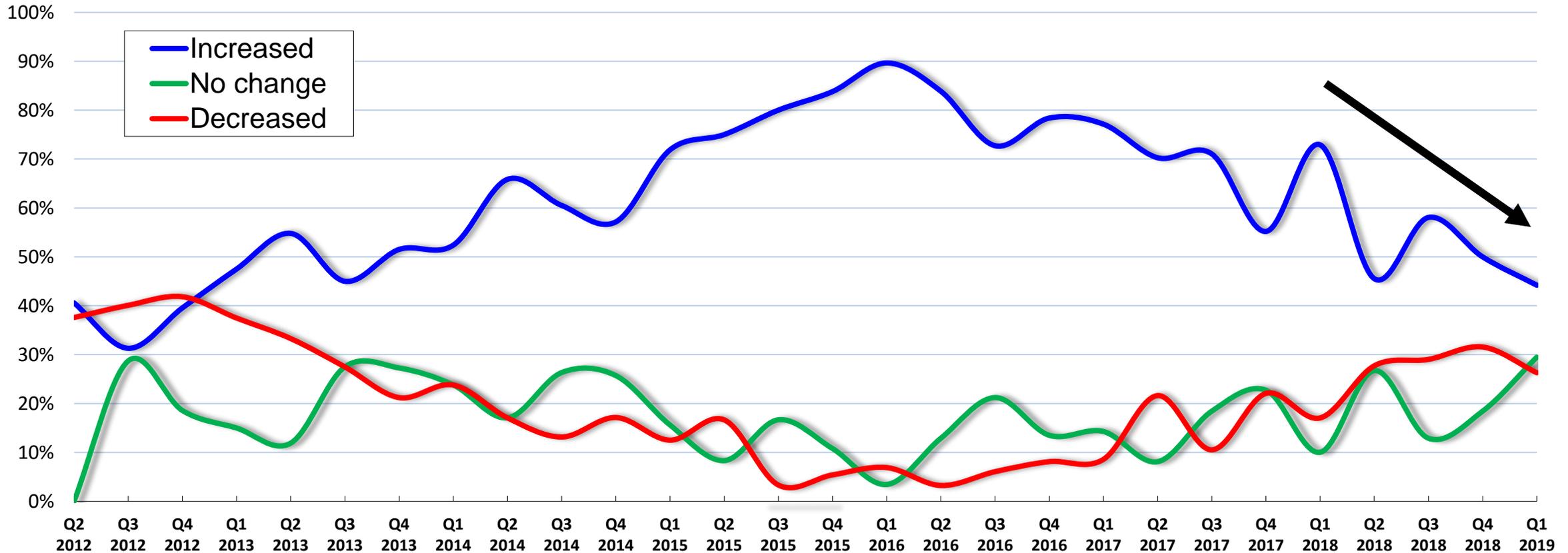
## Customer / Supplier Relationship Index 3



# 5. Volume & value of business (I)



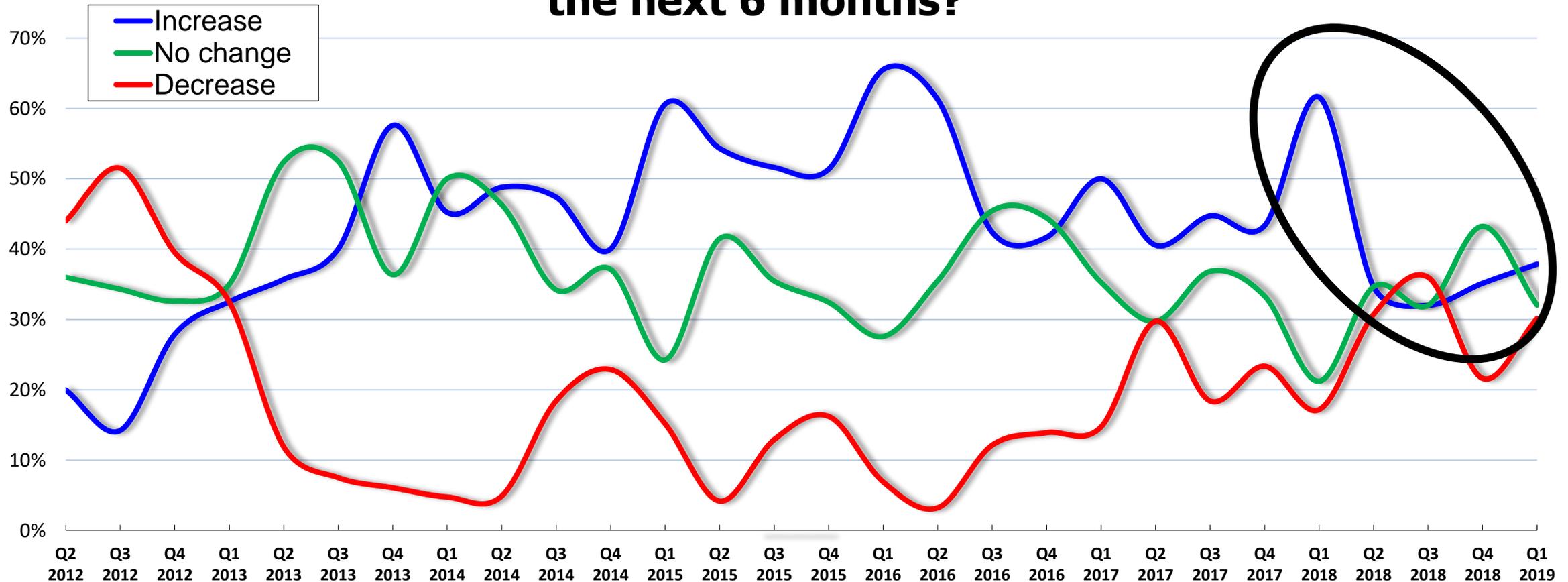
**Compared to one year ago, how has the volume of your business changed?**



# 5. Volume & value of business (II)

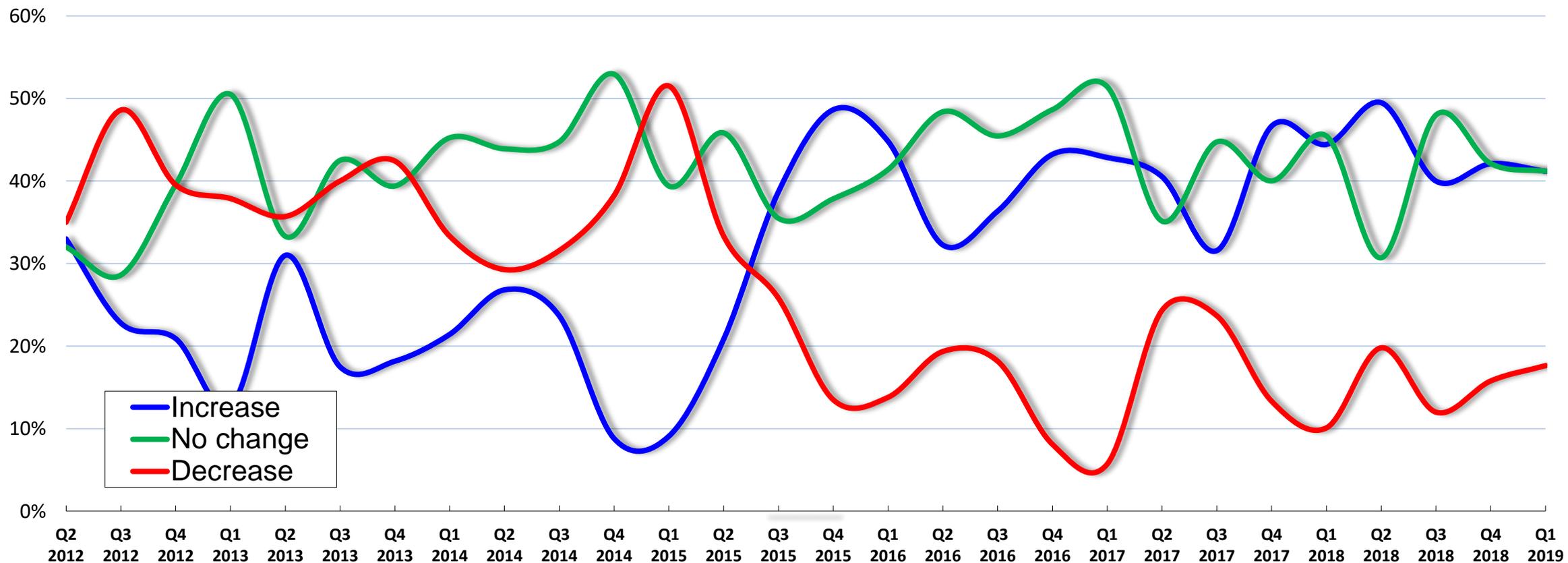


**How do you expect the volume of your business to change in the next 6 months?**



# 6. Average rates

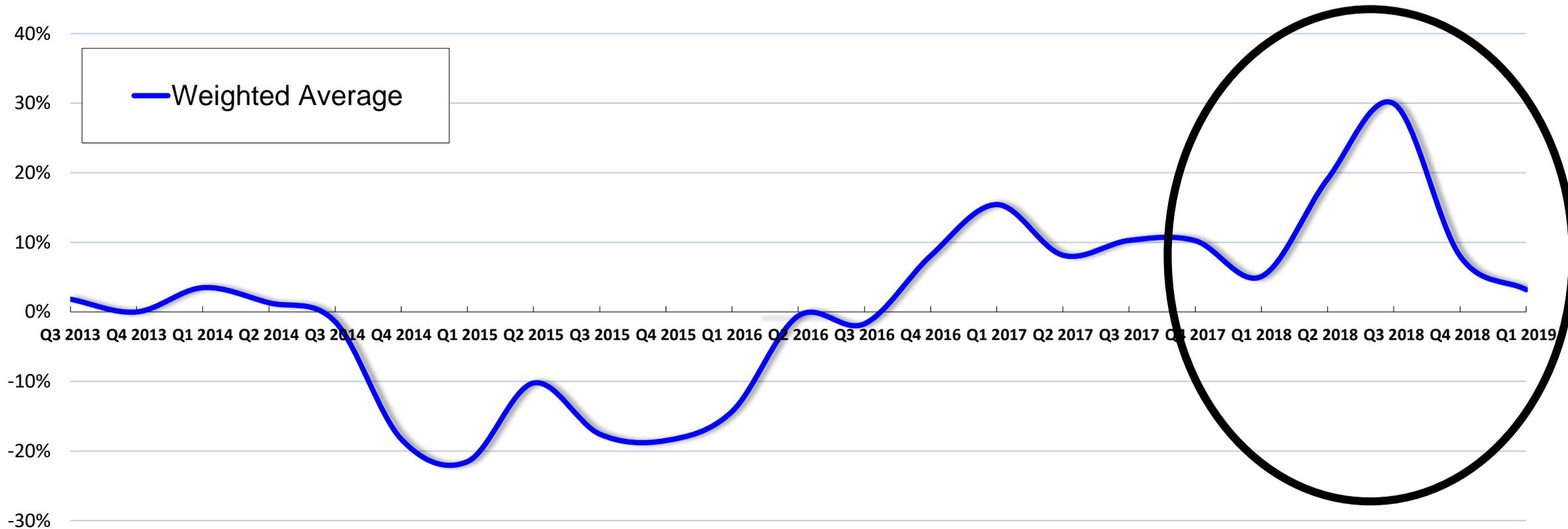
**Compared to the last year, do you expect rates in tenders in which you participate to increase or decrease?**



# 6. Fuel Costs



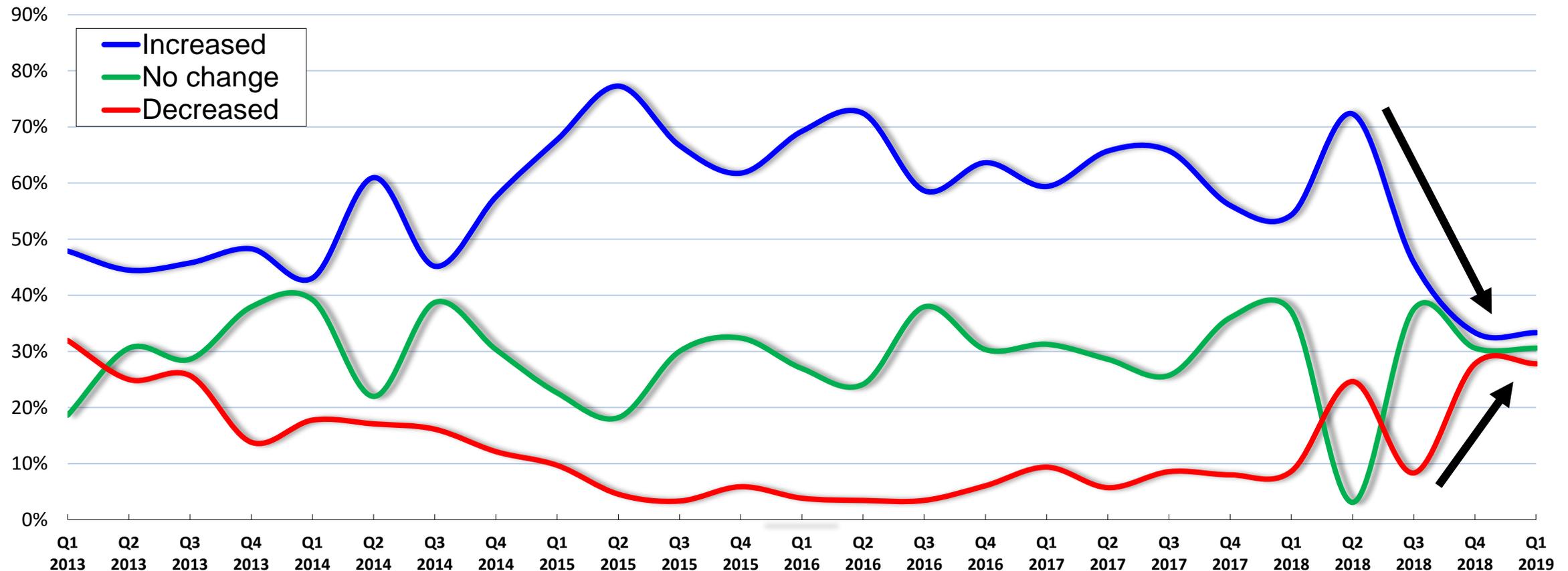
**Compared to one year ago, how has the cost of fuel changed?**



# 7. Fleet capacity utilisation (I)



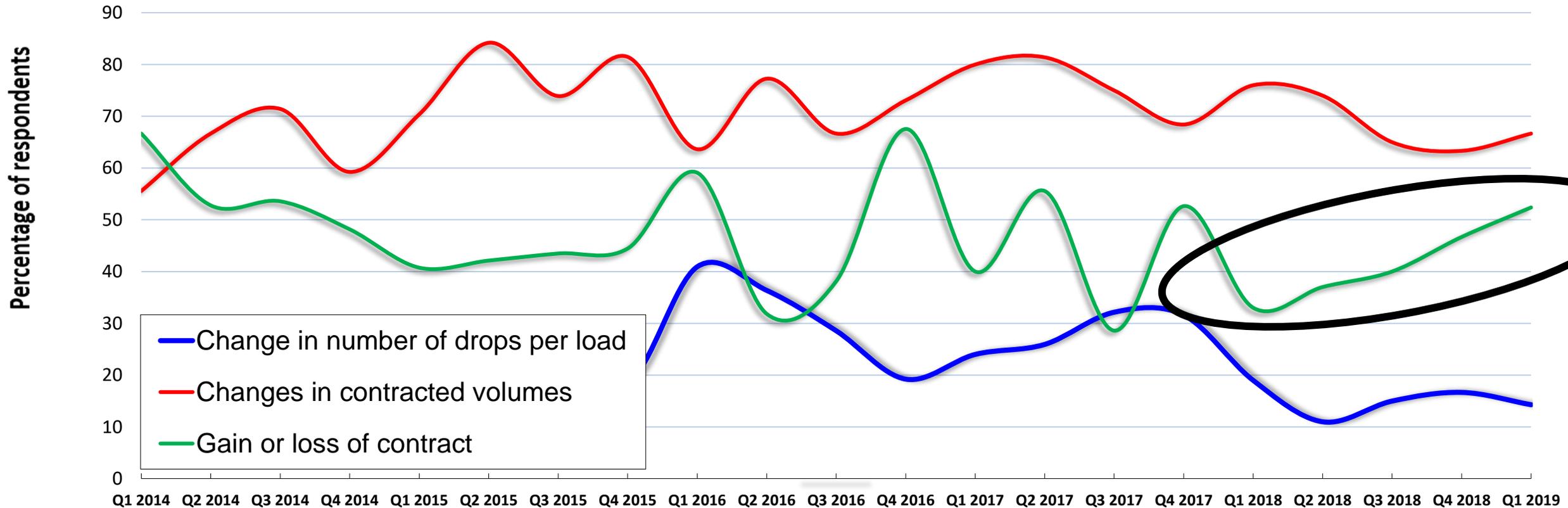
**Compared to one year ago, how has your fleet utilisation changed?**



# 7. Fleet capacity utilisation (II)



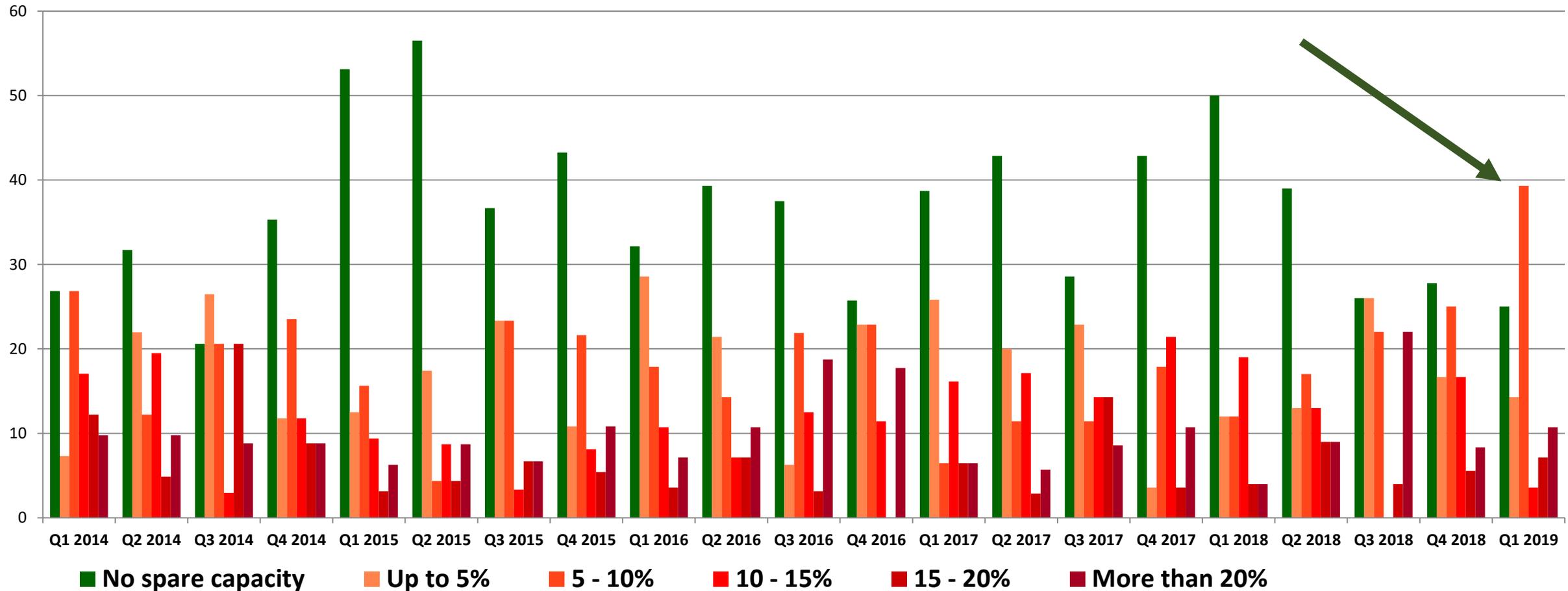
What have been the main reasons for this change?



# 7. Fleet capacity utilisation (III)



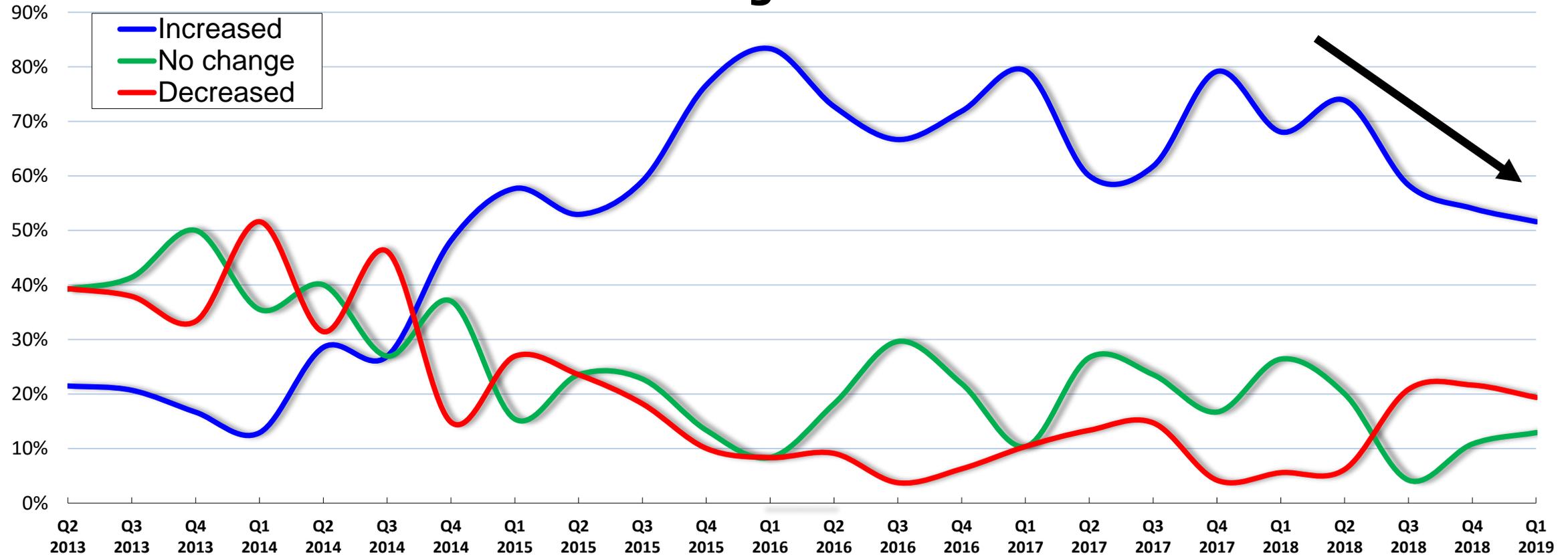
What is your current spare capacity?



# 8. Compound occupancy



**Compared to one year ago, how has your compound occupancy changed?**





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**Please keep completing the Survey!**

**Any questions?**

