

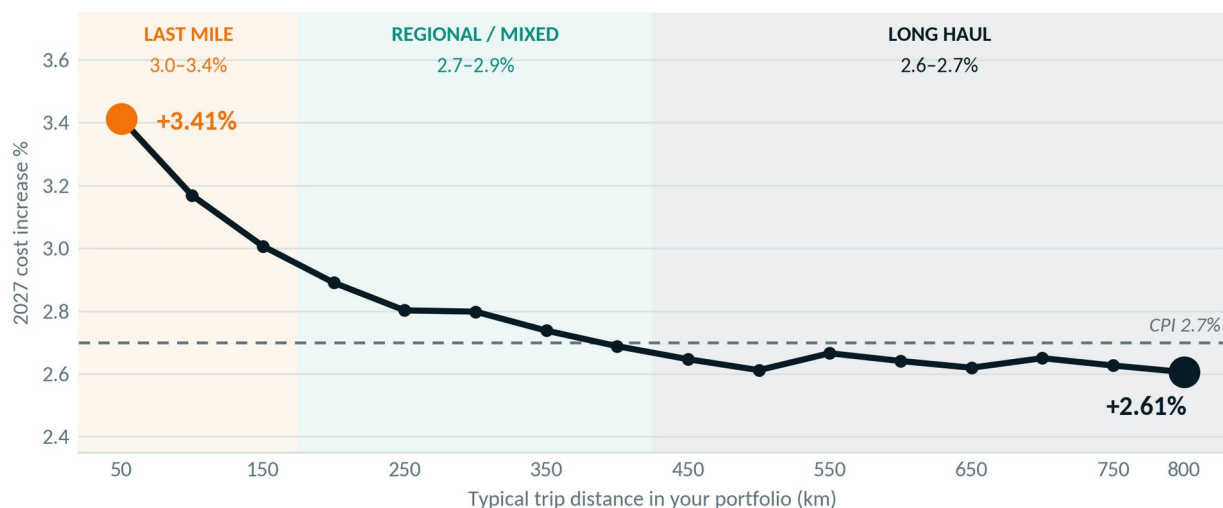
Know your portfolio. Set your 2027 freight budget.

There is no single 2027 increase for German road freight. The right assumption depends on how your trucks run: from +3.4% for last-mile delivery to +2.6% for long haul.

WHICH BUDGET ASSUMPTION FITS YOUR PORTFOLIO?

LAST MILE & URBAN	MIXED / REGIONAL	LONG HAUL
3.4%	≈2.7%	≈2.6%
range 3.0–3.4% • mostly under 150 km	range 2.7–2.9% • short and long runs	range 2.6–2.7% • mostly 450 km+
Driver time is over half the trip cost, so the 2027 wage step lands almost in full. Budget above CPI.	Short and long runs offset each other and the total lands near CPI. Right on average, not lane by lane.	Fuel and tolls dominate and diesel is indexed separately. A CPI uplift over-allows the carrier.

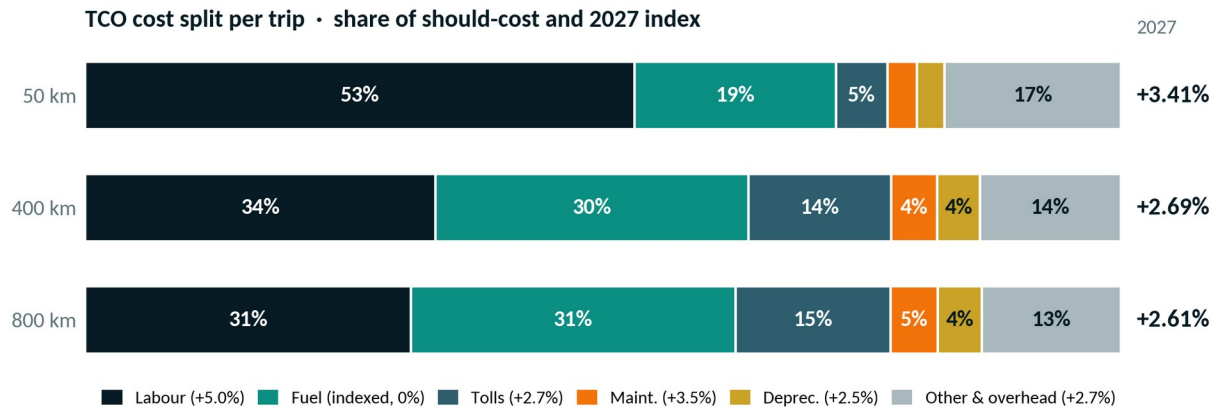
Most shippers roll their freight budget forward with CPI: 2.7% for Germany in 2027 on the Bundesbank, European Commission and IfW Kiel consensus. That works only if your network happens to look like the average. **Know your portfolio, and let it drive the assumption.** That is what Frintelis does: it prices your own lanes with a full TCO cost split and gives you an assumption tailored to how your trucks actually run.



Frintelis should-cost at 16 distance points, same Mega trailer and operating inputs, 2027 cost indexes applied to each point's own cost split.

Driver time, not kilometres, sets the increase

Every trip carries about three hours of loading and unloading, whatever the distance. On a 50 km delivery that fixed time makes labour more than half the cost; on an 800 km run the kilometres dominate and fuel and tolls take almost half. With Germany's minimum wage rising about 5% to €14.60/h in January 2027, the labour share decides the result.



Cost element	2027 change	50 km share	50 km pts	800 km share	800 km pts
Labour	+5.0%	53%	+2.65	31%	+1.57
Fuel	0% (indexed)	19%	+0.00	31%	+0.00
Tolls	+2.7%	5%	+0.13	15%	+0.40
Maintenance	+3.5%	3%	+0.10	5%	+0.16
Depreciation	+2.5%	3%	+0.07	4%	+0.11
Other & overhead	+2.7%	17%	+0.46	13%	+0.36
2027 increase		100%	+3.41%	100%	+2.61%

Contribution = cost share × assumed 2027 change. Labour alone adds 2.65 points at 50 km (78% of the increase) against 1.57 at 800 km.

The risk flips with the profile

Diesel is held at 0% because most contracts pass it through monthly. If diesel rises 10%, a last-mile run gains only 1.9 points, a long-haul run 3.1. Last-mile shippers should budget for wage pressure; long-haul shippers for diesel exposure. Run diesel through the fuel clause, never as a second allowance in the rate.

The same €10m of freight, budgeted by profile

Customer profile	Typical trips	Assumption	2027 increase	vs flat CPI 2.7%
Urban / last-mile distributor	≈50 km	3.4%	+€341k	€71k more than CPI
Regional short-haul shipper	avg 252 km, 87% under 400 km	2.8%	+€283k	€13k more than CPI
Mixed national shipper	avg 410 km	2.7%	+€270k	≈ same as CPI
Long-haul shipper	≈800 km	2.6%	+€261k	€9k less than CPI

Per €10m of annual freight spend. 2027 increase = profile cost split × 2027 cost changes, fuel excluded (indexed).

A last-mile distributor who budgets CPI starts the year €71k short per €10m. A long-haul shipper who accepts CPI from carriers pays for inflation the lanes do not carry. The mixed shipper is fine in total but still needs lane-level allowances for the tender.

HOW FRINTELIS TAILORS YOUR ASSUMPTION

- 1. Load your portfolio.** Lanes, vehicle types and last year's truck counts, straight from your TMS export.
- 2. Frintelis prices every lane or distance band** with a full TCO cost split and applies the 2027 index per cost element: wages, tolls, maintenance, depreciation, inflation.
- 3. You get your own 2027 assumption**, plus band-level allowances for the tender, with diesel kept separate and every number traceable to a public index.

LANE	DIST	VEHICLE	SHOULD €/TRIP	€/KM	COST BREAKDOWN
50 km	50	EU 25 ton Mega trailer	€350	€6.99	
100 km	100	EU 25 ton Mega trailer	€443	€4.43	
150 km	150	EU 25 ton Mega trailer	€533	€3.56	
200 km	200	EU 25 ton Mega trailer	€623	€3.11	
250 km	250	EU 25 ton Mega trailer	€712	€2.85	
300 km	300	EU 25 ton Mega trailer	€830	€2.77	
350 km	350	EU 25 ton Mega trailer	€922	€2.63	
400 km	400	EU 25 ton Mega trailer	€1,012	€2.53	
450 km	450	EU 25 ton Mega trailer	€1,105	€2.45	
500 km	500	EU 25 ton Mega trailer	€1,197	€2.39	
550 km	550	EU 25 ton Mega trailer	€1,338	€2.43	
600 km	600	EU 25 ton Mega trailer	€1,436	€2.39	
650 km	650	EU 25 ton Mega trailer	€1,533	€2.36	
700 km	700	EU 25 ton Mega trailer	€1,675	€2.39	
750 km	750	EU 25 ton Mega trailer	€1,767	€2.36	
800 km	800	EU 25 ton Mega trailer	€1,858	€2.32	

■ Labour
 ■ Fuel
 ■ Deprec.
 ■ Mainten.
 ■ Tolls
 ■ Overhead
 ■ Other

The Frintelis portfolio view: should-cost and TCO cost split for every distance band in one run.

Get the 2027 assumption for your portfolio

Frintelis is road-freight should-cost analysis for European shippers. Send your lane list and see your tailored 2027 budget assumption. Pilot access: frintelis.com

Inputs: German domestic, EU 25 t Mega trailer, German driver; 2 h load, 1 h unload, two stops, 50 km backhaul at every distance; tolls estimated at €0.348/km; default overhead and margin. 2027 changes: labour +5.0% (scenario based on the statutory minimum wage €13.90 → €14.60/h; confirm actual carrier pay before tender), tolls +2.7%, maintenance +3.5%, depreciation +2.5%, other and overhead +2.7%, diesel 0% (indexed). Portfolios are illustrative. Sources: Frintelis portfolio export (21 Sep 2026); Bundesbank Forecast for Germany (Jun 2026); European Commission Spring 2026 Forecast; IfW Kiel and ifo autumn forecasts (Sep 2026, ifo 3.0%); German Federal Government minimum wage schedule; Toll Collect tariffs. Planning scenarios, not carrier quotations; excl. VAT.