

Road freight transport 1999-2004: Cabotage and transport with non-EU countries

Cabotage performed on EU-15 territory nearly doubled between 1999 and 2004

Statistics
in focus

TRANSPORT

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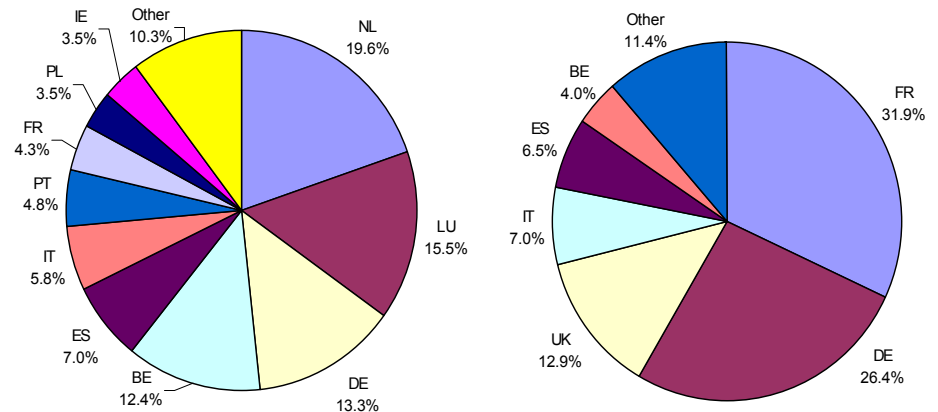
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Graph 1: Cabotage performed by hauliers from reporting countries (left pie chart) and cabotage by country in which cabotage takes place (right pie chart), 2004 - % of tkm



Highlights

Benelux road hauliers remained the most active "caboteurs" in 2004, accounting for just under half of the total cabotage performed of 14.6 billion tonne-kilometres (tkm). German hauliers were also major players, taking a 13% share of the total.

In 2004, one third of all cabotage transport took place in France, almost three quarters in only 3 countries, France, Germany and the United Kingdom. Less than 1% took place in the new Member States.

In 2004, cabotage performed by the 10 new Member States was only 6% of the total for all Member States. Over half of this was carried out by Polish hauliers.

Cabotage and cross-trade was a significant proportion of the total transport for Luxembourg, Lithuania and Slovakia where it formed over 20% of the total in 2004.

In 2004, the total tonnage carried by EU hauliers in international transport was 790 million tonnes but of this only just under 50 million tonnes (6%) was to or from non-EU countries.

The most important non-EU trading partner in 2004 was Switzerland, with 23.8 million tonnes - just under half of the total tonnage, followed by Norway and the Russian Federation. Hauliers from Germany, Italy and the Nordic countries carried over half the tonnage by road between the EU and third countries in 2004. New Member States accounted for 26% of the total.



Cabotage

Table 1: Cabotage performed by hauliers from reporting countries - million tkm

	1999	2003	2004	% change 2003-2004
BE	938	1 867	1 816	-2.7%
CZ	:	:	c	:
DK	102	191	254	32.8%
DE	1 533	1 565	1 944	24.2%
EE	:	57	57	0.0%
ES	271	749	1 031	37.7%
FR	756	551	624	13.4%
IE	416	491	505	2.8%
IT	350	559	847	51.4%
CY	:	:	:	:
LV	:	17	10	-42.3%
LT	:	21	28	33.3%
LU	1 039	2 044	2 262	10.6%
HU	:	59	92	55.0%
NL	1 632	2 339	2 871	22.8%
AT	222	455	390	-14.3%
PL	:	:	506	:
PT	99	319	708	121.7%
SI	:	107	132	23.6%
SK	:	74	89	20.1%
FI	35	25	70	180.2%
SE	:	230	170	-25.8%
UK	44	68	202	195.7%
Total	:	:	14 609	:
NO	24	16	12	-29.5%

Cabotage by road is the carriage of goods in a country by hauliers whose vehicles are registered in another country. The information given here has been reported by hauliers from EU countries and Norway.

Cabotage transport performed by hauliers from all Member States (except Greece and Malta) was 14.6 billion tkm in 2004. There was an overall 20% increase between 2003 and 2004 for the 20 Member States who reported cabotage transport in both years. For the 13 Member States who reported cabotage in 1999 and 2004, the increase was 82%. Although figures for individual Member States fluctuate between years, most countries recorded an increase in cabotage between 2003 and 2004.

Since 1999, hauliers from the Benelux countries and Germany have been the most active, in absolute terms, in cabotage transport, each achieving close to or in excess of 2 billion tkm in 2004. These 4 countries accounted for 61% of the EU-25 total in 2004. However, there have been notable changes in the share of the total tkm performed as cabotage.

In 1999, hauliers from the Netherlands undertook 22% of the total cabotage tkm performed by the 15 countries then Member States. German hauliers undertook 21%, followed by Luxembourg with 14%, Belgium (13%) and France (10%). In 2004, the percentage shares in the EU-25 total for the Netherlands, Luxembourg and

Belgium remained approximately the same at 20%, 15% and 12% respectively. However, the share for Germany was only 13% and that for France only 4%. Although the actual tkm performed on cabotage by French hauliers increased by 13% between 2003 and 2004, the amount in 2004 was less than that recorded in 1999.

Significant increases between 2003 and 2004 were also recorded by Spain (1 billion tkm in 2004 – a 38% increase over 2003), Italy (0.8 billion tkm – a 51% increase) and Portugal (0.7 billion tkm – over double that of the previous year, see also methodological note).

Polish hauliers performed around half a billion tkm of cabotage in 2004, more than the hauliers from all the other new Member States taken together. The total cabotage performed by all these countries accounted for only 6% of the total for all Member States. This is not too surprising, as hauliers from most of the New Member States have still legal restrictions in their cabotage activities (see methodological notes for details).

Table 2: Cabotage transport by country in which cabotage takes place - million tkm

	1999	2003	2004	% change 2003-2004
BE	419	537	574	6.9%
CZ	18	30	27	-10.7%
DK	41	129	184	42.3%
DE	2 537	3 013	3 794	25.9%
EE	:	0	0	-55.9%
EL	7	47	60	27.4%
ES	537	693	929	34.1%
FR	1 488	3 591	4 586	27.7%
IE	5	8	122	1452.3%
IT	933	886	1 001	12.9%
LV	0	10	20	89.8%
LT	0	0	5	1007.2%
LU	11	7	11	49.1%
HU	8	23	29	27.4%
NL	171	217	257	18.6%
AT	142	222	245	10.1%
PL	31	26	42	61.1%
PT	30	40	69	69.5%
SI	1	1	2	62.3%
SK	0	3	7	110.0%
FI	0	26	14	-46.5%
SE	257	255	356	39.5%
UK	712	1 632	1 855	13.7%
Total	7 349	11 398	14 187	24.5%
NO	12	132	197	49.2%

Of the total 14.6 billion tkm of cabotage in 2004 performed by hauliers from Member States, table 2 indicates that 14.2 billion tkm (97%) took place in other Member States. One third of the total (4.6 billion tkm) took place in France and a quarter (3.8 billion tkm) in Germany. The Benelux hauliers performed nearly half of all the cabotage of Member States; not surprisingly the

nearby markets of France and Germany were their main targets. Other countries where cabotage formed over a billion tkm were the United Kingdom (a main target for Ireland) and Italy.

In 2004, less than 1% of the cabotage in EU countries took place in the new Member States. This is likely to be due to the position of these countries in relation to the major "caboteurs" in the EU, the development of their transport markets and, apart from Poland, the relatively small size of their national transport markets.

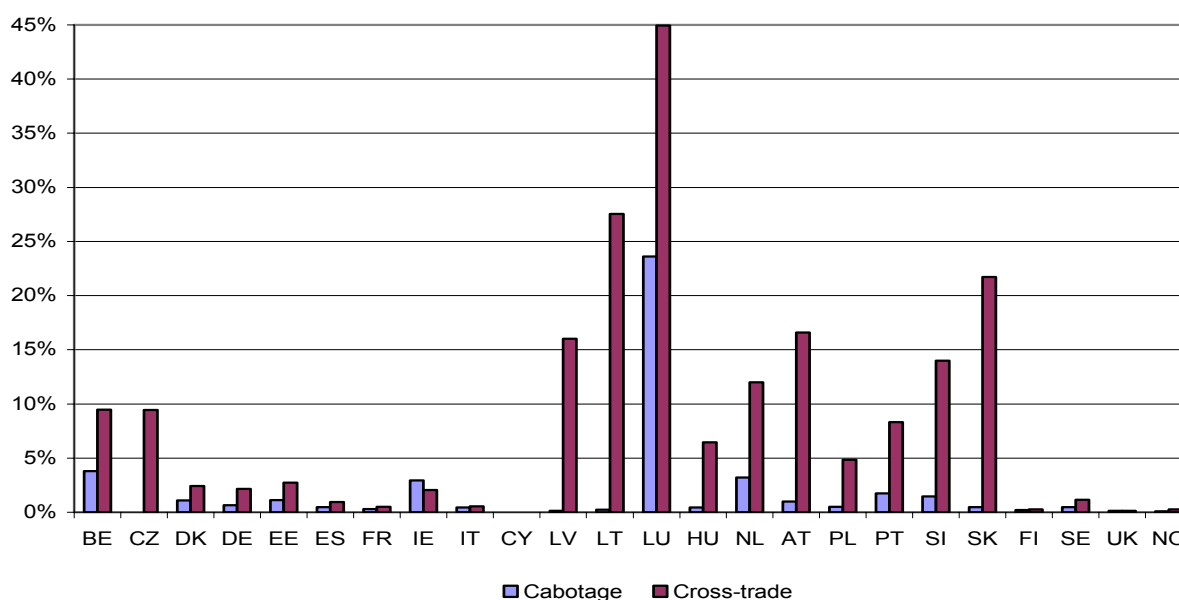
Due to their geographical position, the cabotage taking place in Greece, Portugal and the Nordic countries was also very small, around 6%, of which only that in Sweden, Norway and Denmark were of any numerical significance.

Growth in cabotage on EU-15 territory nearly doubled between 1999 and 2004, with a 24% increase between

2003 and 2004. However, for individual countries there were marked differences from the overall growth (see methodological notes for reliability of cabotage data). The increase between 1999 and 2004 for Germany was only 50% but was 208% for France and 161% for the UK.

In 1999, Germany was the most "cabotaged" state with 35% of the total cabotage taking place on its territory. France was in second place with 20%, followed by Italy (13%) and the United Kingdom (10%). Although the actual tkm increased in these countries, by 2004 France with 33% of the total had replaced Germany (26%) as the most "cabotaged" country. The share of the United Kingdom rose to 13% but that of Italy fell to 7%. The percentages for 2003 were similar to those in 2004 (see graph 1).

Graph 2: Share of cabotage and cross-trade in total transport by reporting country, 2004 - % of tkm



Graph 2 shows the percentage of total transport for each country formed by cabotage and cross-trade. Cross-trade transport is defined as international road transport performed by vehicles registered in a third country (movement of goods by road from country A to country B by hauliers registered in country C).

Apart from Luxembourg, where cabotage presented almost a quarter of the total tkm performed by its hauliers in 2004, cabotage accounted for less than 5% of a Member State's total transport performance. The only other countries where it comprised over 3% were Belgium, Ireland and the Netherlands. Cabotage formed a very small part of the overall transport performance of the new Member States in 2004. The highest percentage was just over 1% for Estonia and Slovenia.

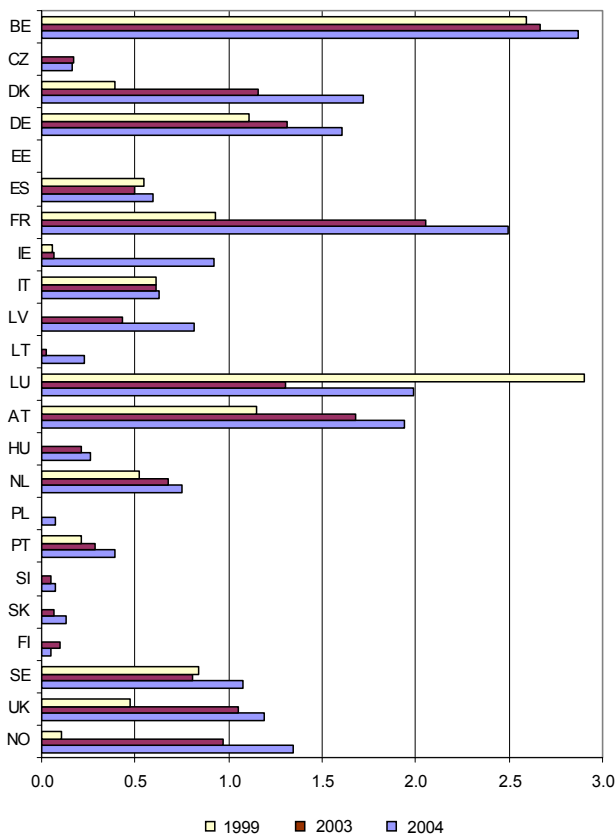
Cross-trade transport is of considerable importance for certain countries. Small countries have an incentive to undertake these forms of transport because of the small

size of their own national market and international transport to and from their own country is also limited. These two forms of transport make up two-thirds of the total reported by Luxembourg with cross-trading being twice as important as cabotage.

For other countries, particularly for Lithuania and Slovakia where it formed over 20% of the total, cross-trade took a significant proportion of their total transport. For Austria, Latvia, Netherlands and Slovenia, over 15% of the total tkm performed by their hauliers were on cabotage and cross-trade.

Apart from Ireland, cabotage formed a smaller percentage of total transport than cross-trade. The percentage of total transport formed by cabotage and cross-trade for the large Member States was very small. Even for Germany, which is a major "caboteur", these two types of activity made up under 3% of the total tkm performed by their hauliers.

Graph 3: Cabotage penetration rate, by country - % of tkm



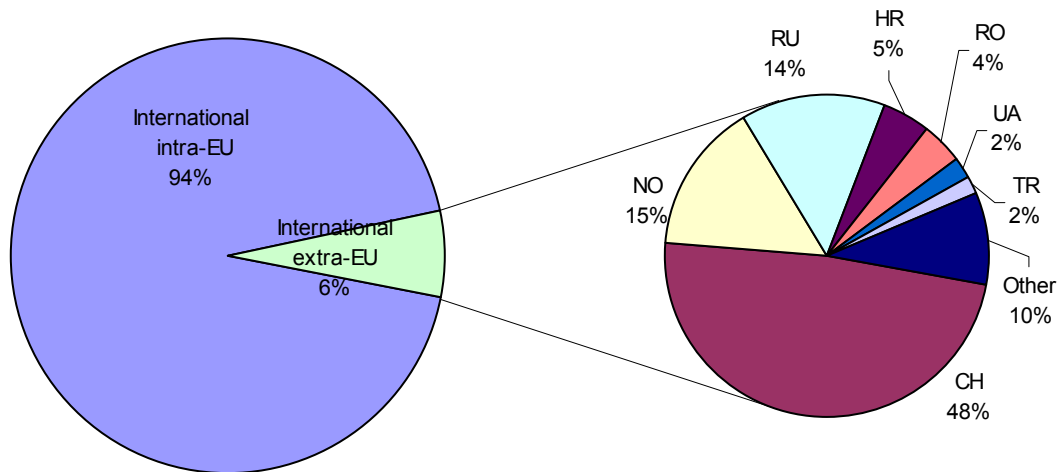
Graph 3 presents the cabotage penetration rate, i.e. the share of cabotage transport in total domestic transport, where total domestic transport is the sum of national and cabotage transport (by country in which cabotage takes place).

The graph illustrates that the percentage of domestic transport formed by cabotage was still very small in all countries. Although the trend over time for most countries was upwards, the penetration rate in 2004 was over 2% only in 2 countries; the most heavily penetrated country being Belgium at 2.9% followed by France at 2.5%. Luxembourg and Austria were third and fourth at just under 2%. Other countries where the rate was over 1% were Denmark, Germany, Sweden, the United Kingdom and Norway. For 14 Member States the figure was under 1%. Because they are small islands, it is unlikely that cabotage would ever take place in Cyprus and Malta.

Although the penetration rate has been low, there were significant increases between 2003 and 2004 in absolute terms in the volume of cabotage taking place in some countries. Of particular note was Ireland, with over a ten-fold increase, although the penetration rate was only 0.9% in 2004. Denmark, Norway and Sweden also recorded increases of around 40% in tkm.

International road transport with non-EU countries

Graph 4: International transport performed by EU hauliers, by partner country, 2004 - % of tonnes



In 2004, the total tonnage carried by EU hauliers in international transport was 790 million tonnes; of this total just under 50 million tonnes (6%) was to or from non-EU countries. Graph 4 and table 3 indicate that 5 non-EU countries accounted for the majority of this transport. It is important to note that, as Norway is not a Member State, in this section the transport of goods between Norway and EU countries is included in the analysis.

Switzerland was, by far, the most important partner country with 23.8 million tonnes, just under half of the total tonnage. Norway with 15% and the Russian Federation (14%) were next with over 7 million tonnes each, followed by Croatia with 5% and Romania (4%).

Table 3: International* transport performed by EU hauliers with non-EU partner countries - 1000 tonnes

	1999	2000	2001	2002	2003	2004
BG	149	211	109	137	267	337
HR	445	667	1 903	2 225	2 234	2 294
RO	802	794	1 135	1 120	1 483	2 083
TR	522	719	371	682	590	768
IS	540	10	22	0	0	0
LI	148	163	130	116	134	117
NO	3 387	5 416	4 854	5 417	6 522	7 548
CH	16 983	16 160	16 974	18 977	22 091	23 835
CS	94	275	387	455	365	543
BY	54	42	49	56	177	628
RU	1 372	2 030	2 660	2 870	5 184	7 186
UA	84	22	237	217	329	1 163
MA	423	442	460	531	597	374
Other Balkan countries	182	259	268	317	293	323
Other CIS	16	51	35	51	78	119
Other non-EU countries	585	918	1 072	1 377	1 334	2 282
Total	25 786	28 179	30 666	34 548	41 678	49 600

* See methodological notes for data availability.

MA: Morocco

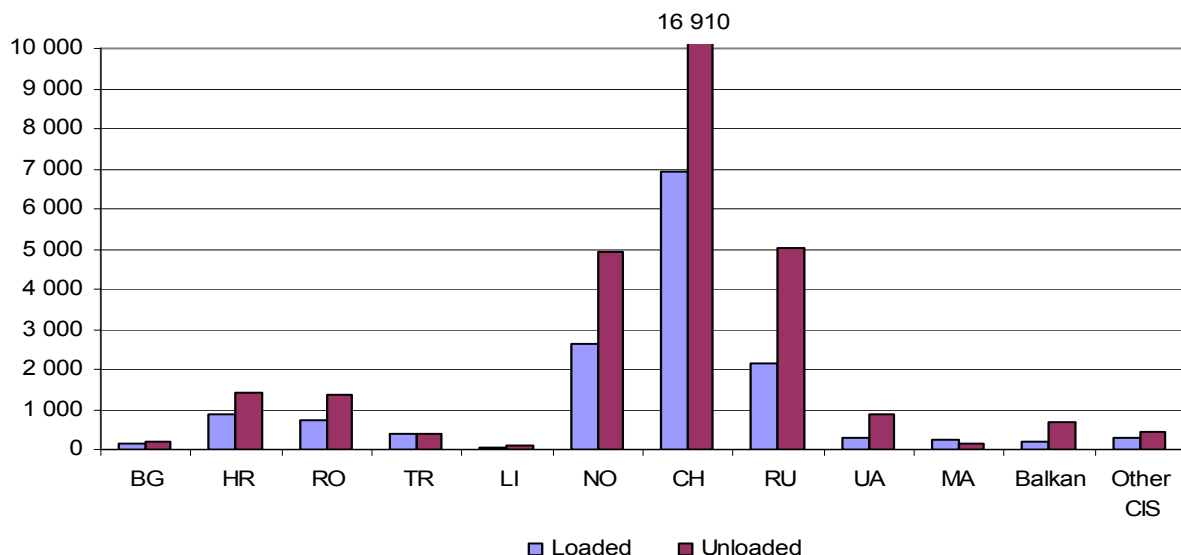
Western Balkan countries: Albania (AL), Bosnia and Herzegovina (BA), the former Yugoslav Republic of Macedonia (MK) and Serbia and Montenegro (CS).

CIS: Azerbaijan (AZ), Belarus (BY), Georgia (GE), Kazakhstan (KZ), Kyrgyzstan (KG), Moldova (MD), Russian Federation (RU), Tajikistan (TJ), Turkmenistan (TM), Ukraine (UA) and Uzbekistan (UZ).

Between 1999 and 2004, there was a steady year on year growth in this transport which has nearly doubled over the period. Although the transport with Switzerland has increased over the period, particularly in the last 3 years, the share of the total tonnage carried has declined from 66% in 1999 to 48% in 2004. Transport with Norway remained around 15% each year and that with Romania varied between 3% and 4%. There has been a large increase, from 5% in 1999 to 14% in 2004 in transport with the Russian Federation. A smaller increase from 2% to 5% over the period was recorded for Croatia. A further point of note is the increase in transport with the Ukraine from 2003 to reach over 1 million tonnes in 2004. Of the 2.3 million tonnes recorded in 2004 for other non-EU territories, 1.4 million was transport with San Marino, which is not part of the European Union.

To an extent, some of these changes are due to the fact that the transport with these countries by the new Member States is not included in the figures for some of the earlier years as the information was not available. In 2004, 26% of the tonnage transported by EU hauliers between the EU and these countries was carried by hauliers from the new Member States.

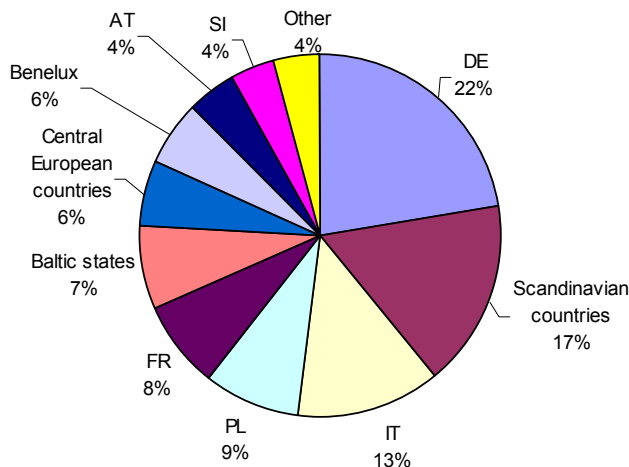
Graph 5: Goods loaded / unloaded in non-EU partner countries by EU hauliers, 2004 - 1000 tonnes



Graph 5 shows the balance of trade in the tonnage carried by EU hauliers between the EU and the non-EU partner countries. In 2004, over two-thirds of the total tonnage moved from/to non-EU countries was unloaded in the non-EU countries.

The ratio of 2 to 1 in terms of tonnage unloaded to loaded applied to all the countries shown in the graph apart from Turkey, where the ratio was 50:50 and Morocco, where the inverse of 1 to 2 was found.

Graph 6: Share of EU countries in international transport to/from non-EU partner countries, 2004 - % of tonnes



Nordic countries: Denmark, Finland and Sweden
Baltic States: Estonia, Latvia, Lithuania
Central European countries: Czech Republic, Hungary and Slovak Republic
Benelux: Belgium, Luxembourg and the Netherlands

Graph 6 and table 4 show who are the major EU players in the transport of goods to and from non-EU countries. In some cases Member States have been grouped on the graph into areas that are traditional and reflect the non-EU trading partners of these areas. For example, Norway, although participating in the EU survey of the carriage of goods by road, is not a Member State and is a major trading partner of the Nordic countries that are Member States.

Hauliers from Germany, Italy and the Nordic countries carried over half the tonnage by road between the EU and other countries in 2004. Sweden carried half of the Nordic total, with Finland 30% and Denmark 20%.

Germany, with 11 million tonnes, was the largest individual country. The second country was Italy with over 6 million tonnes, followed by Poland and Sweden with 4 million tonnes each. These 4 countries accounted for 52% of the total tonnage transported.

Of the 3.7 million tonnes transported by the Baltic States, 50% were carried by Lithuanian hauliers; just over a quarter by Latvian hauliers and just under a quarter by hauliers from Estonia. The Central European countries transported 3 million tonnes; 46% by the Czech Republic, 32% by Hungary and 22% by Slovakia.

Hauliers in many of the new Member States are major players in this market. These countries accounted for 12.8 million tonnes, 26% of the total. In rank order of tonnage transported were Poland, Slovenia, Lithuania, Czech Republic and Latvia.

The Benelux countries, with 2.8 million tonnes transported of which 70% was by The Netherlands, are not major players in this market.

Spanish hauliers accounted for two thirds of the 2 million tonnes for the other Member States shown in graph 6, Morocco being an important trading partner.

Table 4 shows the rank order for EU countries in terms of the total tonnes loaded and unloaded in non-EU countries, as well as the order when considering loaded separately from unloaded. The 10 EU Member States listed in the ranking for total tonnage were responsible for over 80% of the total transport with non-EU countries in 2004.

Germany and Italy were in first and second position in the ranking for total tonnes, tonnes loaded and tonnes unloaded, as were Sweden and France in fourth and fifth position. Other positions changed considerably due to the balance between the tonnages loaded and unloaded in non-EU countries by hauliers from some Member States.

Table 4: Top 10 EU countries for international transport with non-EU partner countries, 2004 - 1000 tonnes

Rank in 2004	Reporting country	Tonnes loaded/unloaded	Reporting country	Tonnes loaded	Reporting country	Tonnes unloaded
1	DE	11 168	DE	3 164	DE	8 004
2	IT	6 391	IT	1 853	IT	4 538
3	PL	4 253	FI	1 478	PL	3 450
4	SE	4 202	SE	1 312	SE	2 890
5	FR	3 889	FR	1 253	FR	2 636
6	FI	2 435	PL	803	AT	1 575
7	AT	2 196	NL	737	LT	1 435
8	NL	1 953	SI	718	NL	1 216
9	SI	1 902	DK	635	SI	1 184
10	LT	1 777	AT	621	FI	957

It was noted earlier in the comments on graph 5 that over two-thirds of the total tonnage carried by EU hauliers between the EU and the non-EU partner countries was unloaded in the non-EU countries and that this ratio held for most of the non-EU countries.

However, this was not the case for the transport by hauliers from individual Member States. Hauliers from Poland and Lithuania unloaded over 80% of their total tonnage transported in non-EU countries. For Finland the figure was only 40%. As a result, although Poland was ranked 3rd for total and unloaded tonnage it was only in 6th position for loaded tonnage where Finland took 3rd place. However, Finland was in 6th place for total tonnage but ranked 10th for unloaded tonnage. Lithuania came 10th in rank overall and 7th for unloaded tonnage but was not in the top 10 for loaded tonnage where Denmark appeared in rank 9 but did not make the top 10 elsewhere.

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

The data presented in this publication were collected in the frame of Council Regulation (EC) 1172/98 on statistical returns in respect of the carriage of goods by road. These data are based on sample surveys carried out in the reporting countries, i.e. EU Member States and Norway and record the road goods transport undertaken by vehicles registered in these countries.

Cabotage

Definition and history: Cabotage is declared by Member States for hauliers registered in their country that performed transport on the national territory of another country. From the point of view of the reporting country, it is considered as international transport, from the point of view of the movements of goods, it could be considered as national transport.

With the aim of increasing transport efficiency and reducing the number of empty journeys, cabotage transport was gradually introduced in 1990 through authorization quotas (quantitative restrictions) and completely liberalized in 1998 in the EU-15. The cabotage regime was extended to the EFTA states (except Switzerland) following the creation of the EEA (European Economic Area). Cabotage between EU-15 and the new Member States, in general, will be liberalized at the latest after 5 years from accession, but cabotage is already allowed for Cyprus, Malta and Slovenia and in case of bilateral agreements between two States.

Cabotage penetration rate: Share of cabotage transport in total national transport, where total national transport is the sum of national transport and cabotage transport (by country in which cabotage takes place).

Data reliability: As road cabotage transport represents only a small percentage of total road transport and the data are collected on the basis of sample surveys, the importance of cabotage could sometimes either be over- or underestimated. Furthermore, variability in cabotage transport performance often occurs due to 'haulage contracts' that have a limited validity. A haulier might thus perform cabotage transport operations in one year and lose this market to a transport operator registered in a different country the next year. These elements should be kept in mind when reading this publication.

As New Member States had no obligation to report for years prior their accession in 2004, the coverage of reporting countries is not the same over the period 1999-2004.

International road freight transport with non-EU countries

The figures presented in this part are aggregates of all EU-25 reporting countries (graph 4, table 3 and graph 5).

In this part, international road freight transport refers to international transport loaded in the reporting country, international transport unloaded in the reporting country and cross-trade. Cabotage, normally considered as international transport, is not included in this part.

Double counting is avoided since reporting relates only to resident carriers of the reporting countries.

Cross-trade transport: Cross-trade transport is defined as international road transport performed by a road motor vehicle registered in a third (EU) country (movement of goods by road from country A to country B by hauliers registered in country C).

Goods loaded in a country: The volume of goods loaded in a (non-EU) country is the sum of international transport and cross-trade loaded in this country by hauliers from all EU-25 reporting countries and unloaded in an EU-25 Member State.

Goods unloaded in a country: The volume of goods unloaded in a (non-EU) country is the sum of international transport and cross-trade unloaded in this country by hauliers from all EU-25 reporting countries and loaded in an EU-25 Member States.

'Haulier' refers to a transport operator either undertaking road transport for 'hire or reward' (i.e. the carriage of goods for remuneration on behalf of third parties) or transport for 'own account'.

Czech Republic

Czech Republic has reported road transport data since 2000 but no cabotage transport for 2003.

Greece

Since 1999, Greece has not reported any road transport data.

Cyprus

Cyprus has not reported any cross-trade and cabotage transport data.

Italy

Due a change in the methodology, there is a break in the time series 2003-2004.

Malta

Since 2004, Malta has not reported any road transport data.

Portugal

Since 2004 the response rate has been improved, therefore the number of vehicles transporting goods has been increased by about 25%. This has caused an enormous increase of road freight transport between 2003 and 2004, resulting in a break in time series.

Sweden

Sweden reported 1999 data according to the former Directives.

United Kingdom

2004 data are provisional and will be revised.

More detailed data and metadata are available in the Eurostat dissemination database

Table 1, Table 2 and Graph 3

New Member States had no obligation to report for years prior their accession in 2004. As a result, percentage changes between 2003 and 2004 are shown in tables 1 and 2 only where both years were available and in graph 3, data for 1999 and 2003 might be missing.

Table 3

New Member States had no obligation to report for years prior their accession in 2004. Therefore, the figures presented for the period 1999 to 2003 include international transport reported by the following countries:

1999: EU-14 Member States (excluding Greece).

2000: EU 14 Member States and the Czech Republic.

2001: EU-14 Member States, the Czech Republic, Hungary and Slovenia.

2002: EU-14 Member States, the Czech Republic, Cyprus, Latvia, Hungary and Slovenia.

2003: EU-14 and all New Member States except Malta and Poland.

Member States use their own national surveys for the collection of data based on returns from road hauliers. The results are micro-data referring to vehicles and their linked journeys providing detailed information on goods transported. International transport in this publication is derived from goods information

Data availability

The figures presented in this publication have been extracted from Eurostat's free dissemination database and reflect the state of data availability at the end of February 2006.

In this publication

1 billion = 1 000 000 000

: not available

0 for less than half of the measurement unit






c confidential

This publication was prepared with the assistance of Howard Collings and Marie-Noëlle Dietsch.

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