



# Statistics in focus

## TRANSPORT

THEME 7 – 5/2003

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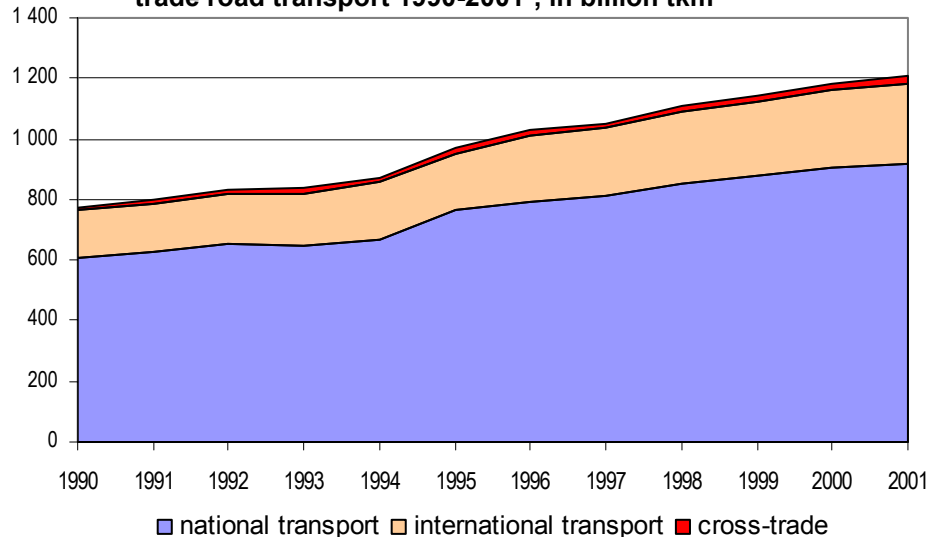
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# Trends in road freight transport 1990-2001

*90% of international transport of all Member States consists of intra-EU traffic, except for Sweden and Finland*

*Josefine Oberhausen*

Figure 1: Trend of the contribution of national, international and cross-trade road transport 1990-2001<sup>1</sup>, in billion tkm



<sup>1</sup>Data for 10 Member States (B, DK, D, EL, E, F, I, NL, P, UK) – see also methodological notes.

### Main Trends

In 2001, the volume of road transport in the EU is estimated to have been 1 329 billion tonne-kilometres (tkm). Of the total, national transport accounted for 75%, international transport for 22% and cross-trade transport for 3%.

For national transport, all countries with figures available over the full period recorded a growth in tkm between 1990 and 2001. Ireland recorded the largest rise at 135%, followed by Belgium and Spain with 63% each.

While there has been a declining trend in 'own account' transport over the years, it varies between over 50% in Portugal (1999) to less than 15% in Spain. In terms of products carried, between 1990 and 2001, there has been a shift in tkm away from minerals and building products towards foodstuffs and machinery, transport equipment, etc., a category including much containerised traffic.

The picture for international transport was mixed. While Spanish hauliers achieved a 269% rise in tkm between 1990 and 2001 and Danish, Irish and Portuguese hauliers (Portuguese data estimated) saw their tonne-kilometres more than double, France recorded only a very modest increase (5%). The figures for Greece (available up to 1998) reflect the problems in the Balkans. With the exception of Finland and Sweden, over 90% of the international road goods transport consists of intra-EU traffic.

In 2001, the Benelux countries were the most active in cross-trade transport, followed by Austria and Germany. The Benelux hauliers together performed nearly half (49%) of the entire cross-trade transport performance (in tkm) of the EU, reflecting their relatively small home markets.

## General development

**Table 1: Contribution of national, international and cross-trade in total road transport, in 1990, 1995 and 2001, by Member State - in million tkm**

	1990			1995			2001			total
	national	international	cross-trade	national	international	cross-trade	national	international	cross-trade	
Belgium	12 616	19 433	2 298	18 616	22 833	3 799	20 565	26 501	4 481	51 547
Denmark	9 354	5 145	:	9 327	12 421	499	10 887	10 510	573	21 970
Germany	:	:	:	201 299	33 664	2 762	230 016	52 150	5 109	287 275
Greece	12 485	2 119	4	12 357	867	:	<i>20 000</i>	<i>1 500</i>	<i>0</i>	<i>21 500</i>
Spain	69 924	12 271	:	78 744	22 513	373	114 004	45 323	1 369	160 696
France	118 200	34 064	2 174	135 300	40 041	2 694	168 572	35 917	1 775	206 264
Ireland	3 878	1 008	184	:	:	:	9 122	2 295	371	11 788
Italy	115 786	20 498	:	150 301	12 497	186	154 749	30 553	610	185 912
Luxembourg	:	:	:	531	<b>3 341</b>	:	487	2 009	4 647	7 143
Netherlands	22 581	30 896	4 396	26 683	33 901	5 972	31 000	37 470	8 020	76 490
Austria	:	:	:	11 069	12 474	<b>2 930</b>	12 454	18 623	6 006	37 083
Portugal*	10 978	5 152	133	11 119	<b>7 199</b>	468	19 988	12 228	1 298	33 514
Finland	:	:	:	21 804	:	:	26 678	3 671	83	30 432
Sweden	:	:	:	28 357	3 057	64	29 967	3 681	347	33 995
United Kingdom	132 968	10 651	361	146 714	14 415	291	149 760	13 208	238	163 206

\* for 2001, P reported only 'hire or reward' transport; the total was estimated on the basis of the 'own account'-share of 1999.

Figures in bold: see methodological notes.

Estimates in italic.

In 2001, the total volume of road transport (without however cabotage transport) performed by hauliers registered in the various EU countries is estimated at 1 329 billion tkm.

National transport accounts for three-quarters of the total, whereas international transport has a share of 22%. Please note that in 2001, the latter includes transport performance of EU hauliers outside the EU. International transport and cross-trade figures for years prior to 1999 may refer for

some countries, according to the Directives 78/546 and 89/462, to EC-12 and EU-15 respectively. International and cross-trade transport outside the EU is in these cases not included for these reference years. Transport performances of non-EU hauliers on EU territory are not included at all.

Cross-trade transport accounts for only 3% of the total at EU-level; it is nevertheless important for certain Member States (16% of the total for Austria, 65% for Luxembourg, in 2001).

## National transport

With an estimated 998 billion tonne-kilometres in 2001, national goods transport remains by far the most important contributor in the overall road transport activity. Obviously, the geographically large Member States have substantial national markets and display the highest figures (see Table 2). Germany, France, Italy and the UK taken together accounted for 70 % of the total national transport performance in 2001.

Keeping in mind that from the reference year 1999 onwards data were collected according to a different principle (see methodological notes), Table 2 shows that most countries recorded an increase. Compared to 1995, a year for which data coverage is fairly complete, Spain's 2001 figure shows a 45% rise followed by France with 25%. The development was less pronounced for Italy and the UK, where figures remained relatively stable.

**Table 2: National transport – in million tkm**

	1990	1995	1996	1997	1998	1999	2000	2001
Belgium	12 616	18 616	16 615	18 426	16 693	15 758	19 754	20 565
Denmark	9 354	9 327	9 432	9 712	10 108	10 421	11 000	10 887
Germany	:	201 299	199 195	203 119	210 402	226 887	226 529	230 016
Greece	12 485	12 357	15 056	16 394	19 322	:	:	<i>20 000</i>
Spain	69 924	78 744	76 257	80 634	91 329	98 134	106 936	114 004
France	118 200	135 300	136 502	138 960	145 459	159 026	163 163	168 572
Ireland	3 878	:	:	:	:	7 737	8 337	9 122
Italy	115 786	150 301	151 025	153 600	<b>164 151</b>	151 967	158 250	154 749
Luxembourg	:	531	392	<b>394</b>	<b>395</b>	377	415	487
Netherlands	22 581	26 683	27 303	27 384	28 240	32 682	31 538	31 000
Austria	:	11 069	11 444	11 559	11 715	12 280	12 389	12 454
Portugal*	10 978	11 119	13 994	14 443	14 693	14 229	<i>15 312</i>	<i>19 988</i>
Finland**	:	21 804	22 185	23 508	25 611	25 576	27 717	26 678
Sweden	:	28 357	30 288	32 176	30 369	30 422	31 451	29 967
United Kingdom	132 968	146 714	150 195	152 502	155 431	149 019	150 337	149 760

\* Since 2000, P reported only 'hire or reward' transport; the total was estimated on the basis of the 'own account'-share of 1999. - \*\* For 1999 figures are based on 'supplementary tables' (see methodological notes). - Figures in bold: see methodological notes.

Estimates in italic.

When limiting the analysis to data from 1999 onwards (based on similar sample-surveys carried out in the various Member States) it appears that Portugal (+ 40%, estimated) as well as Belgium and Luxembourg (with + 31% and + 29% respectively) recorded a considerable increase.

A decline has been registered for the Netherlands, where the national transport performance decreased by 5%. Sweden's performance dropped by a moderate 1%.

**Figure 2: National transport, share by distance class and type of transport, on the basis of tonnes forwarded – 2001<sup>1</sup>**

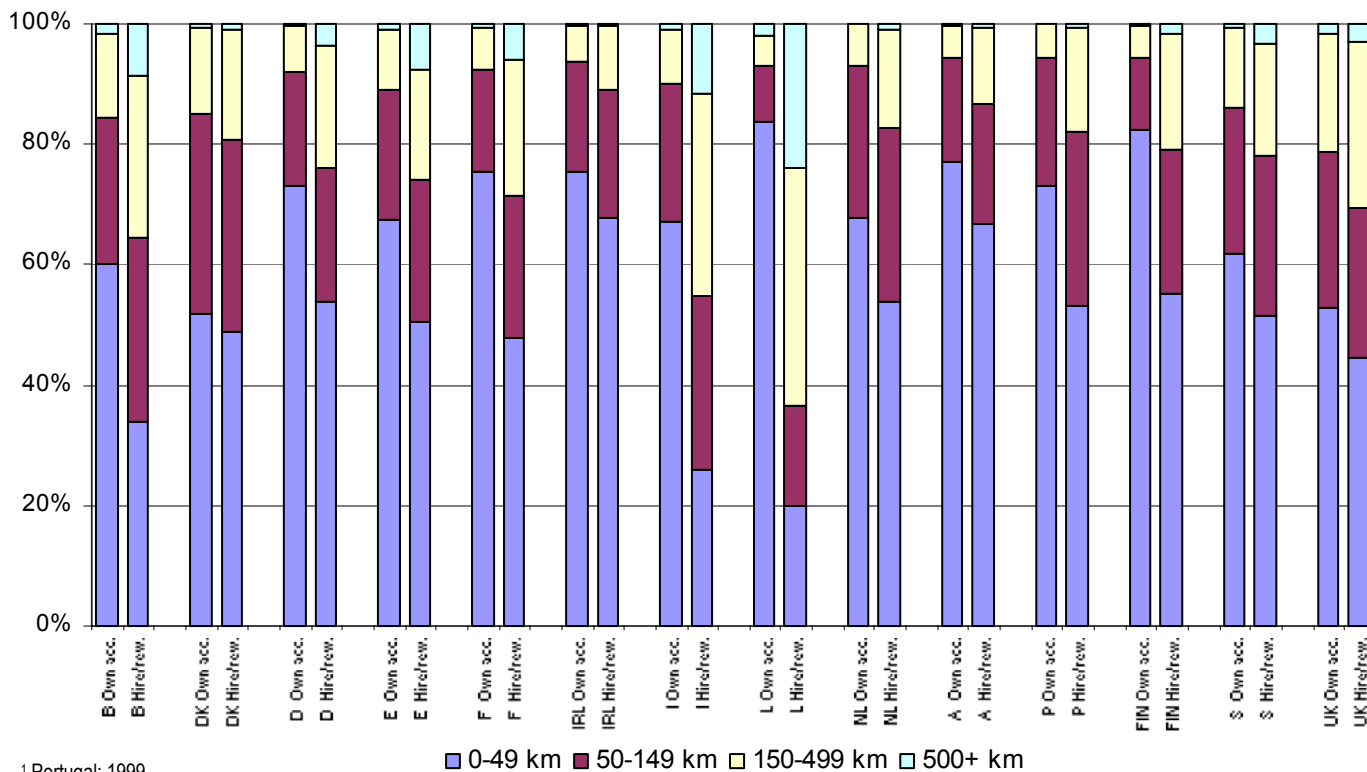
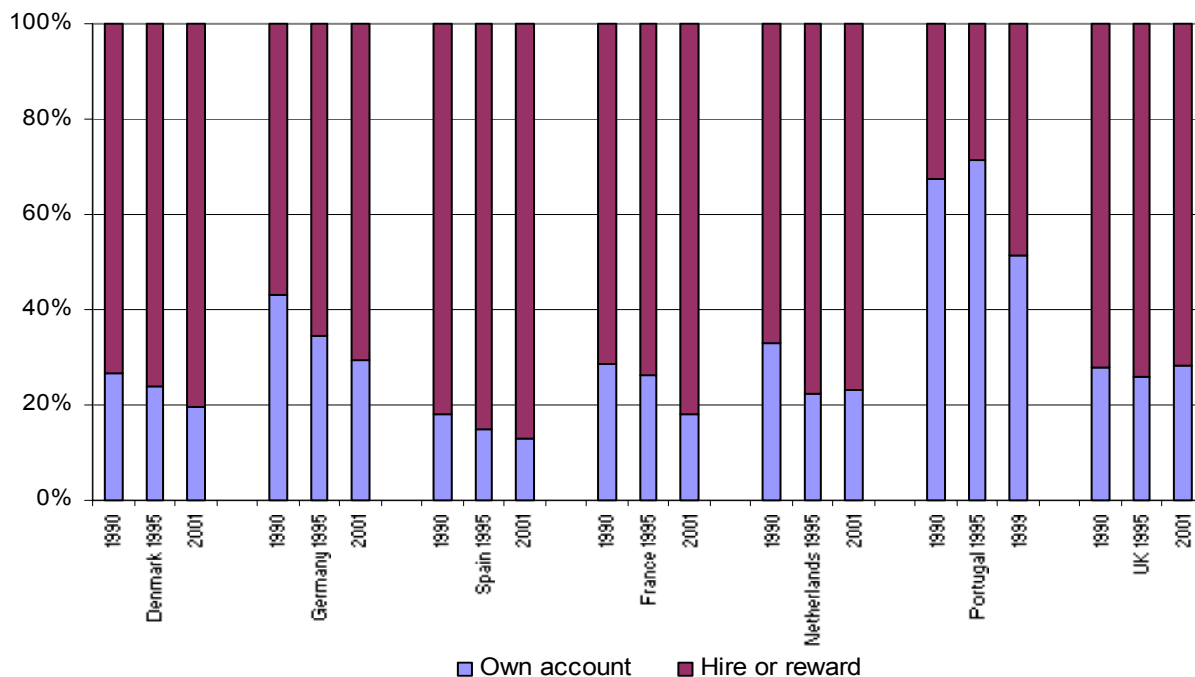


Figure 2 shows that for all countries for which data are available, the highest proportion of the goods (calculated on the basis of tonnes lifted) is forwarded over a relatively short distance. The share of the “0-49 km” distance class in 2001 is dominant for nearly all countries, both in ‘own account’ transport and transport for ‘hire or reward’. For the latter category, Luxembourg and Italy constitute the exceptions. In nearly all cases, the shortest distance class accounts for at least 50% of all journeys, emphasizing the flexibility of this mode of transport (distance class categories for rail goods transport for example record the highest shares in the two highest categories).

In general, it appears that ‘own account’ transport features shorter distances than transport for ‘hire or reward’. Although certain geographically smaller Member States are not able to perform national journeys of more than 500 km, the “500+ km” category shows much better in the ‘hire or reward’ category than in ‘own account’ transport.

Figure 3 on the following page outlines the relative share of ‘own account’ and ‘hire or reward’ road transport for the years 1990, 1995 and 2001 (for those countries for which data are available). In general, ancillary transport activities of enterprises appear to be more and more outsourced since a gradual decline of the ‘own account’ transport share can be observed in most countries. Portugal seems to be a special case: this country features by far the highest share in ‘own account’ transport. Compared to 1990, its share increased to 70% in 1995. Since Portugal did not declare ‘own account’ transport in both 2000 and 2001, 1999 is the latest year in which this split could be established (see methodological notes). It appeared that ‘own account’ transport experienced a serious decline but still stood at 51%, by far the highest share of all the countries observed. The United Kingdom is the only country where there has been no noticeable change in the relative shares.

**Figure 3: National transport, share by type of transport, on the basis of tkm performed**

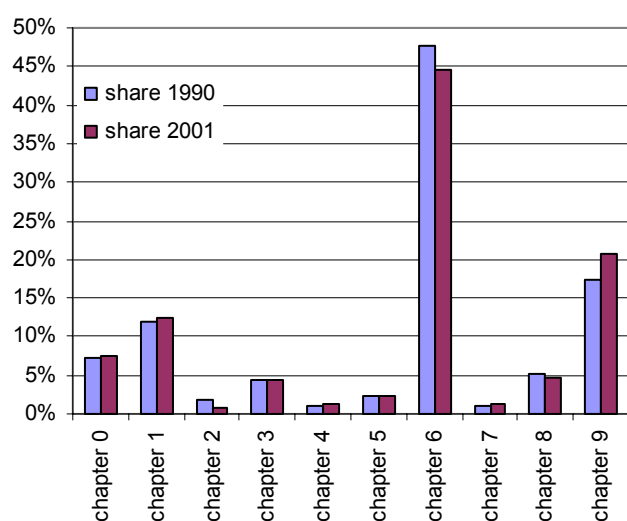


The relative share of the various goods groups in national transport is outlined in Figure 4. On the basis of tonnes forwarded, there have been no major changes in the shares of the various groups between 1990 and 2001. 'Crude and manufactured minerals and building materials' (chapter 6) continues to represent by far the most important category: in 2001 its share amounted to around 45% (1990: 48%) of the total tonnage lifted. The category that follows is 'machinery, transport equipment, manufactured and miscellaneous articles' (chapter 9), representing 21%

(1990: 17%) of the total. The figures in brackets show where the most noticeable change has taken place: a shift away from 'crude and manufactured minerals and building materials' to more 'machinery, transport equipment, manufactured and miscellaneous articles'.

The shift has been gradual in recent years: the increase of the latter goods group may be due to goods packed in containers, for which the content is often not exactly known to reporting authorities and thus allocated to chapter 9, the category that englobes 'miscellaneous articles'.

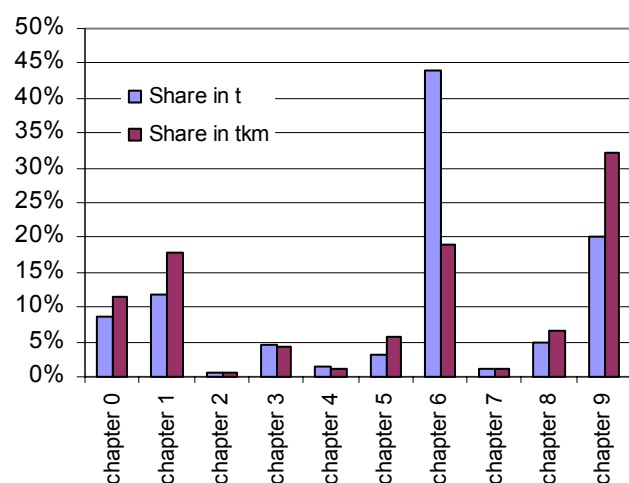
**Figure 4: National transport, share of goods groups by NST/R chapter—2001 compared to 1990**



NST/R chapters	
0	Agricultural products and live animals
1	Foodstuffs and animal fodder
2	Solid mineral fuels
3	Petroleum products
4	Ores and metal waste
5	Metal products
6	Crude and manufact. minerals, building mat.
7	Fertilizers
8	Chemicals
9	Machinery, transport equipm., manufactured articles and miscellaneous articles

Note: Data based on tonnes forwarded by the following Member States :DK, D, E, F, IRL, NL, P, UK.

**Figure 5: National transport, share of goods groups by NST/R chapter – tonnes and tonne-kilometres, 2001**



Note: National goods transport in all Member States except EL.

Figure 5 focuses on the situation in 2001 and compares the relative share of the various goods groups on the basis of their weight lifted (tonnes) to those taking into account the distance of the load carried (tonne-kilometres).

Where chapter 6 reaches 44% when expressed in tonnes, its contribution to the total is only 19% when expressed in tkm. As mentioned earlier, 'minerals and building materials' are 'weightwise' dominant, but they are carried over a relatively short distance. When looking at the rail and inland waterway transport modes, this difference is far less noticeable.

The opposite situation, however to a lesser degree, is true for chapter 9: 'machinery, transport equipment, manufactured and miscellaneous articles' have a 'weight' share of 20%, but a 'weight-over-distance' share of 32%. Goods belonging to chapter 9 are carried over a much longer distance. The same can be said for agricultural products, foodstuffs and metal products (chapter 0, 1 and 5 respectively).

## International transport

The sum of the performances in 'regular' international road transport (i.e. without cross-trade transport and cabotage) is shown in Table 3. The figures include goods loaded in the reporting Member State and carried abroad as well as goods unloaded in the reporting Member State (loaded abroad). Figures are declared only for hauliers registered in the declaring Member States. The figures thus do not refer to the 'territoriality'-principle and do not include road transport performed by non-EU hauliers.

With Greek data being estimated, international road transport by EU registered hauliers in 2001 was 296 billion tkm. This represents 22% of the total road transport

performance of EU hauliers.

Germany, Spain, France and Italy together account for 55% of the total. If the traditionally very active hauliers from the Benelux countries (with important gateways like Rotterdam and Antwerp) were grouped, they would represent close to a quarter (22%) of the total international transport performance.

The 2001 figures for Spain show an extraordinary high growth compared to 1990 (+269%), the equivalent growth figures for Ireland and Portugal (Portugal estimated) are +128% and +137% respectively. Danish hauliers doubled their transport performance.

**Table 3: International transport (excluding cross-trade and cabotage transport) – loaded and unloaded - in million tkm**

	1990	1995	1996	1997	1998	1999	2000	2001	2001 - share (%) in total		
									International intra-EU	Candidate Countries	Other international
Belgium	19 433	22 833	21 084	21 920	19 900	17 250	25 320	26 501	97.9	0.5	1.6
Denmark	5 145	12 421	11 344	11 226	10 796	12 276	12 166	10 510	90.7	2.3	7.0
Germany	:	33 664	33 887	38 751	42 173	45 652	48 684	52 150	90.4	4.5	5.0
Greece	2 119	867	841	1 734	1 272	:	:	1 500	:	:	:
Spain	12 271	22 513	25 250	28 348	32 814	35 066	40 472	45 323	97.7	1.1	1.2
France	34 064	40 041	40 333	39 439	40 291	41 975	37 863	35 917	96.6	0.9	2.5
Ireland	1 008	:	:	:	:	1 699	2 650	2 295	96.3	2.5	1.1
Italy	20 498	12 497	23 940	19 754	:	24 465	25 742	30 553	89.8	5.2	4.9
Luxembourg	:	<b>3 341</b>	:	1 213	<b>1 245</b>	1 461	1 529	2 009	98.7	0.1	1.2
Netherlands	30 896	33 901	35 147	35 999	36 809	41 005	37 876	37 470	95.3	2.2	2.5
Austria	:	12 474	13 103	13 613	14 610	15 653	16 712	18 623	91.6	5.4	3.0
Portugal*	5 152	<b>7 199</b>	8 846	10 046	<b>10 188</b>	10 990	<i>11 855</i>	12 228	97.7	0.2	2.1
Finland**	:	:	2 570	2 122	2 413	3 716	3 977	3 671	70.1	1.5	28.5
Sweden	:	3 057	2 827	2 662	2 916	2 721	3 732	3 681	68.8	2.1	29.1
United Kingdom	10 651	14 415	15 523	16 263	16 122	16 905	14 951	13 208	94.6	1.9	3.5

\* Since 2000, P reported only 'hire or reward' transport; the total was estimated on the basis of the 'own account'-share of 1999.

\*\* For 1999, figures are based on 'supplementary tables' (see methodological notes).

Figures in bold: see methodological notes.

Estimates in italic.

As mentioned earlier, these views may be somewhat biased due to the change in methodology that occurred between 1998 and 1999.

If limited to the development of transport performances between 1999 and 2001, it appears that Belgium increased its international transport by 54%. Spain, Ireland, Luxembourg and Sweden are other countries that recorded considerable increases (between 30% and 40%). Conversely, the United Kingdom registered a serious drop (-22%). Please note that various particularities apply to the UK figures (see methodological notes). Both Denmark (despite a doubling compared to 1990) and France fell by 14%; whereas the decline of the performance of Dutch hauliers was less serious (-9%).

The last three columns of Table 3 give a rough insight on the main relations of international road goods transport in

2001. For nearly all countries for which data are available, it appears that over 90% of the tonne-kilometres performed were done in the frame of intra-EU goods transport. The near totality (98%) of international road goods transport of Spain and Portugal consisted of intra-EU traffic.

Finland and Sweden stand out with an intra-EU traffic share of 'only' around 70%. The share in 'other international' for those countries is by far the highest of all EU Member States.

At a low level in absolute terms, Austria, Italy and Germany feature the most important share in transport to and from the candidate countries, with 5.4%, 5.2% and 4.5% respectively. Obviously, most road goods transport to and from candidate countries is performed by hauliers registered in those States.

## Cross-trade transport

As shown in Figure 1, cross-trade represents only a small proportion of total road goods transport: it accounted for an estimated 35 billion tkm (or 3%) in 2001. Although the data in Table 4 is not complete, it becomes obvious that cross-trade experienced a general upward trend.

More interesting is the relative importance of this type of transport for certain Member States. Especially smaller Member States with a geographically central location feature a high proportion, largely due to the limited size of their home markets. Sixty-five percent of the total road goods transport of Luxembourg consists of cross-trade. Indeed, Luxembourg registered hauliers perform nearly as much cross-trade transport as their more numerous

German counterparts. The share of cross-trade in total transport amounts to 10% for the Netherlands and 9% for Belgium.

Whereas in 2001 the cross-trade share of most other Member States is well below 4% (and less than 1% for Spain, France, Italy, Finland and the United Kingdom), one Member State stands out: with 6 billion tkm performed, Austria's cross-trade share in the total amounts to 16%, second only after Luxembourg. In fact, Austrian hauliers alone performed roughly the same amount of cross-trade transport (expressed in tkm) as the hauliers of the three Scandinavian countries and Germany together.

**Table 4: Cross-trade transport performed by hauliers from reporting countries – in million tkm**

	1990	1995	1996	1997	1998	1999	2000	2001
Belgium	2 298	3 799	3 746	2 933	3 848	3 339	4 606	4 481
Denmark	:	499	432	478	390	436	606	573
Germany	:	2 762	2 656	3 293	3 855	4 354	4 086	5 109
Greece	4	:	:	:	:	:	:	:
Spain	:	373	454	495	703	791	1 064	1 369
France	2 174	2 694	2 911	2 795	2 811	2 957	2 157	1 775
Ireland	184	:	:	:	:	354	563	371
Italy	:	186	237	:	:	509	411	610
Luxembourg	:	:	1 767	2 594	<b>2 710</b>	3 436	4 436	4 647
Netherlands	4 396	5 972	6 269	6 493	7 014	8 246	8 455	8 020
Austria	:	<b>2 930</b>	<b>3 202</b>	<b>3 390</b>	<b>3 798</b>	5 827	5 676	6 006
Portugal*	133	468	361	332	352	688	774	1 298
Finland**	:	:	153	21	64	102	231	83
Sweden	:	64	50	70	26	17	318	347
United Kingdom	361	291	401	392	403	292	223	238

\* Since 2000, P reported only 'hire or reward' transport; the total was estimated on the basis of the 'own account'-share of 1999.

\*\* For 1999, figures are based on 'supplementary tables' (see methodological notes).

Figures in bold: see methodological notes.

## ➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Data with regards to the years up to and including 1998 presented in this bulletin were collected in the frame of Council Directive 78/546/EEC 'on statistical returns in respect of carriage of goods by road', amended by Council Directive 89/462/EEC.

Data relating to the years 1999-2001 were collected in the frame of Council Regulation (EC) 1172/98 on statistical returns in respect of the carriage of goods by road, replacing the previous Directives.

This publication thus publishes statistical results obtained from two different bases. Whereas data collected under Council Directive 78/546/EEC are essentially based on declarations from customs authorities, the data collected under Council Regulation (EC) 1172/98 are based on sample-surveys carried out in the various Member States. Although substantial efforts have been made to allow comparability and smooth breaks in series (indicated as a 'bar' behind the figures), certain methodological adjustments might be necessary in future. Data presented in this publication are basically taken from Eurostat's reference database NewCronos. For Finnish data however, the so-called 'supplementary tables', as supplied in connection with Council Regulation (EC) 1172/98 on a voluntary basis by the individual Member States, have been used for 1999. On European level, common aggregation procedures were used that might divert from national practices. Therefore differences of the values in this publication might occur when comparing them to the national values.

For the distinction between national and international transport, journey related information is used on European level which might cause differences in corresponding values from those countries that are using goods related information for this definition.

When compared to previous editions of "Statistics in Focus" on trends in road freight transport, it appears that cabotage transport is not included in this version. Cabotage transport will be treated in a separate "Statistics in Focus" later this year.

### Germany

Presenting pre-1995 data is difficult for two reasons: 1990 data do not take into account the re-unification of Germany. Calculating transport growth on the basis of that year would thus be misleading. Furthermore, a break in the series occurs between 1994 and 1995 when Germany introduced new sample survey methods. Hence Eurostat prefers not to show German data for the period before 1995. Another break is caused by the fact that as from 1999 formerly exempted transport is now taken into account.

### Portugal

For the 2000 and 2001, Portugal reported 'hire or reward' transport only. Total transport, both for national and international transport, has been estimated on the basis of the 'hire or reward' share in the total transport of 1999.

### United Kingdom

Up to and including 1998, the domestic legs of international journeys have been included in both national and international transport. Some journeys to/from the Irish Republic have been included as national transport and excluded from international

transport. Furthermore, empty legs of collection and delivery rounds are included in the laden UK journeys leading to an overestimation of tonne-kilometres performed.

### International transport (without cross-trade and cabotage)

International transport as presented in this bulletin is based on goods loaded and unloaded in the reporting Member States. Double counting is avoided since reporting relates only to resident carriers of the reporting countries: since 1999, the figures sum up the goods dispatched from resident carriers to all countries of the world and the goods brought into the reporting country by resident carriers from all countries of the world.

### Cross-trade transport

Cross-trade transport is defined as international road transport performed by a road motor vehicle registered in a third country. It should therefore be considered as being part of international transport.

Figures presented in table 4 take into account cross-trade transport by hauliers of the reporting countries. Thus, figures do not express where this type of transport has taken place but by whom. Cross-trade data are not complete for the years up to and including 1998. For these figures, two sources have been used: Council Directive 78/546 data and figures from the 'Common Questionnaire' (joint questionnaire from Eurostat, UN-ECE and ECMT).

### Breakdown by type of transport

The information presented in figure 3 takes into account the Member States that have supplied equivalent datasets for 1990, 1995 and 2001. Since Portugal did not declare 'own account' transport in 2000 and 2001, the latest available year has been taken instead (1999).

### Breakdown by goods groups

The NST/R classification (Standard Goods Nomenclature for Transport Statistics / Revised) consists of 24 goods groups. Because of the lack of available space, it is not possible to present all 24 groups separately. The individual goods groups have thus been aggregated at NST/R chapter level. A brief description of the NST/R chapters is given in the relevant section of the commentary to enhance readability.

For detailed information on the NST/R classification, please refer to "Ramon", Eurostat's Classification Server ([www.eurostat.eu.int/comm/eurostat/ramon](http://www.eurostat.eu.int/comm/eurostat/ramon)).

The figures presented in this publication reflect the **state of data availability** in Eurostat's reference database NewCronos as of February 2003.

**Figures appearing in bold** refer to corrections and adjustments made by Member States in the frame of the validation of the content of this publication. The underlying detailed values do not necessarily appear in Eurostat's reference database NewCronos, as countries could not yet provide corresponding updates.

**In this publication:** 1 billion = 1 000 000 000

**This publication** was established with the assistance of Maria Smihily, Lucia D'Auria (data) and Jelle Bosch (commentaries).

# Further information:

## ➤ Databases

New Cronos, Domain Road

To obtain information or to order publications, databases and special sets of data, please contact the **Data Shop** network:

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