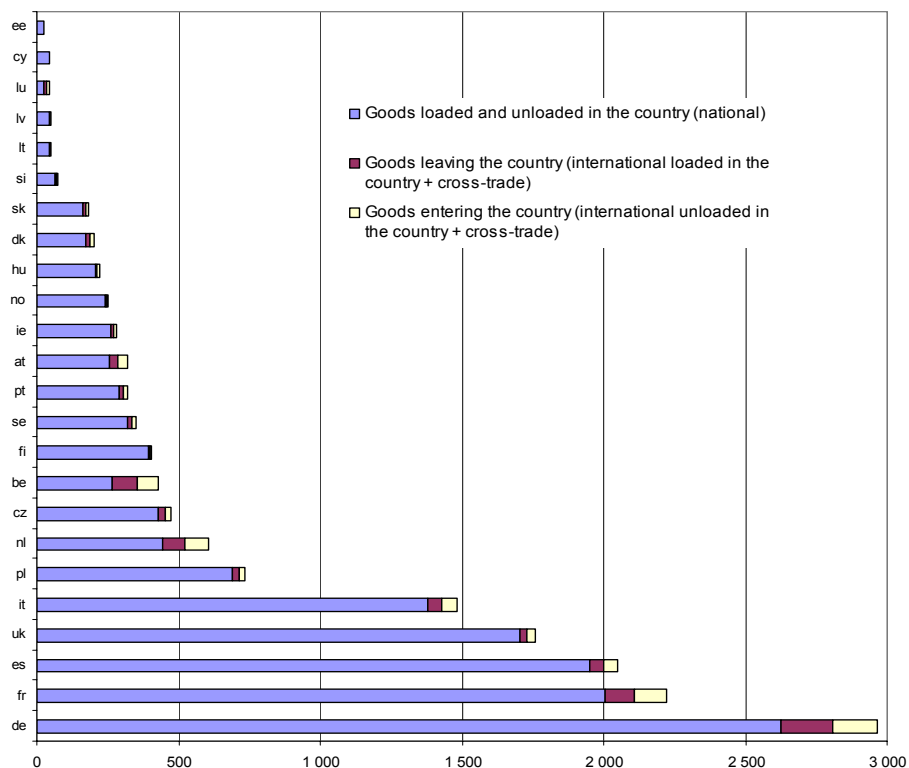


Road freight transport by origin – destination 2004

Top ten flows are all between EU-15 countries

Graph 1: Goods moved on each country's territory, 2004 - million tonnes



Data availability: See 'Methodological notes'.

Highlights

European road transport in 2004 was dominated in tonnage terms by the five major economies Germany, France, Spain, the UK and Italy, for which international transport is relatively minor compared with national transport.

For a number of mid-sized Member States, such as the Netherlands, Austria, Denmark and especially Belgium, international transport was more significant. With the exception of Cyprus, this was also true for the smaller economies, such as Estonia, Latvia, Lithuania, Slovenia and especially Luxembourg.

Germany was the largest force in both intra- and extra-EU international transport. For intra-EU transport, hauliers from France, Belgium and the Netherlands also had significant shares. For extra-EU transport, Sweden and Italy came to the fore as the other main players. Interestingly, Poland and Finland also emerged as significant players in this area.

Polish national carriers accounted for a very high proportion of that country's international transport movements, a marked contrast with French hauliers, who contributed only 34% to their outgoing international transport. The largest country to country flow in intra EU transport, when considering tonne-kilometres, was that between France and Spain.

Statistics in focus

TRANSPORT

10/2005

Authors

Carla SCIULLO

Maria SMIHILY

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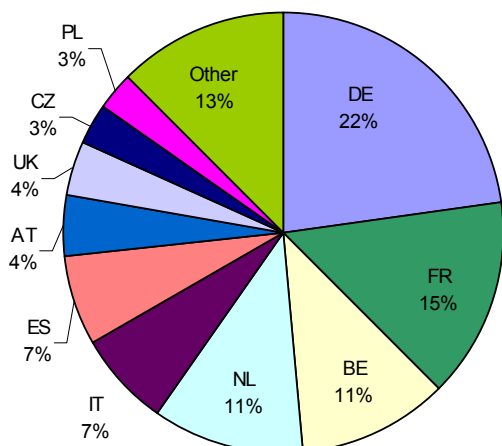
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Structure of international road freight transport for EU Member States

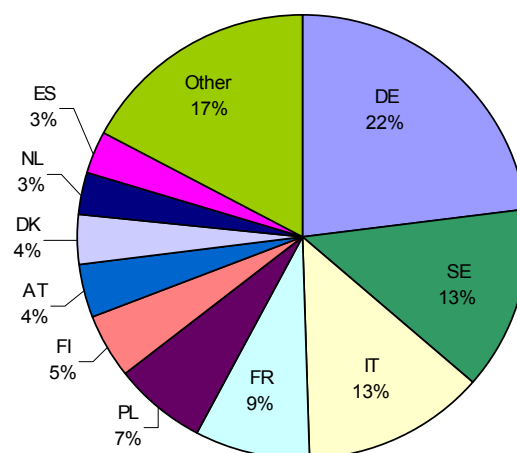
Graph 2: Share of each country's international transport in the total international intra-EU transport, 2004 - % in tonnes



Data availability: See 'Methodological notes'.

In 2004, Germany, with 22% of the total, dominated both intra- and extra-EU international transport in tonnage terms. In intra-EU transport, the other major players were France, Belgium and the Netherlands. Among the new Member States, both the Czech Republic and Poland accounted for 3% of the total tonnes moved in intra-EU international transport. For extra-EU transport, Sweden with its long land border with Norway, and Italy, supplying Switzerland and San Marino, were also significant contributors. Poland and Finland, both countries on the periphery, also made substantial contributions.

Graph 3: Share of each country's international transport in the total international extra-EU transport, 2004 - % in tonnes



Data availability: See 'Methodological notes'.

Table 1 describes the activities of all reporting countries on a specific national territory. It reveals that Germany is the country with the highest values for goods entering and leaving, both in 2000 and 2003, followed by France and Belgium. The comparison between these two years, though, should be done cautiously. In 2003, the activity of most of the new Member States was included in the figures, while in 2000 only the activity from one new Member State (Czech Republic) could be added. Hence some of the higher values in 2003 for the old Member States territories, especially those near the new Member States, are impacted by this difference in the coverage of the two years.

Table 1: Goods leaving or entering a country, 2000 and 2003 - 1000 tonnes

	Goods leaving the country		Goods entering the country		Total	
	2000	2003	2000	2003	2000	2003
BE	90 972	87 832	75 133	74 086	166 105	161 918
CZ	20 363	23 286	13 622	18 199	33 985	41 485
DK	11 995	11 565	12 291	13 264	24 286	24 829
DE	134 660	155 277	132 387	139 321	267 047	294 598
EE	93	1 776	166	1 300	259	3 076
ES	32 698	39 109	32 097	37 506	64 795	76 615
FR	93 977	95 710	98 884	103 803	192 861	199 513
IE	4 522	7 438	9 703	11 112	14 225	18 550
IT	38 512	43 657	40 416	45 372	78 928	89 029
CY	:	9	:	11	:	20
LV	9	2 014	59	2 105	68	4 119
LT	64	2 990	37	2 424	101	5 414
LU	6 411	8 919	7 922	10 085	14 333	19 004
HU	1 930	6 608	1 821	7 225	3 751	13 833
NL	75 982	78 033	72 316	77 042	148 298	155 075
AT	23 219	28 178	26 361	30 770	49 580	58 948
PL	1 914	3 813	2 745	4 216	4 659	8 029
PT	7 042	8 150	10 189	9 747	17 231	17 897
SI	561	680	760	980	1 321	1 660
SK	2 428	8 860	2 557	7 915	4 985	16 775
FI	3 284	3 728	3 661	4 221	6 945	7 949
SE	10 667	12 709	9 281	11 564	19 948	24 273
UK	23 199	24 037	23 615	28 016	46 814	52 053
NO	3 555	4 258	5 603	6 658	9 158	10 916

Data availability: See 'Methodological notes'.

Table 2: Goods leaving or entering a country, by nationality of hauliers, 2004 - 1000 tonnes

	Goods leaving the country				Goods entering the country			
	Total (1000 tonnes)	Share in %			Total (1000 tonnes)	Share in %		
		National hauliers	Other EU15 hauliers	Other new MS hauliers		National hauliers	Other EU15 hauliers	Other new MS hauliers
BE	87 944	43%	54%	3%	74 471	36%	61%	3%
CZ	23 883	79%	9%	12%	20 211	77%	8%	15%
DK	13 724	64%	30%	5%	14 589	50%	43%	6%
DE	177 634	43%	43%	13%	160 971	36%	48%	15%
EE	2 147	81%	1%	18%	1 715	72%	3%	25%
ES	48 992	57%	38%	5%	49 351	56%	40%	4%
FR	103 292	34%	62%	4%	110 880	28%	68%	4%
IE	7 402	62%	37%	0%	11 018	49%	50%	1%
IT	51 780	41%	49%	10%	55 072	37%	53%	9%
CY	6	100%	0%	0%	7	100%	0%	0%
LV	2 418	70%	1%	29%	2 232	59%	1%	40%
LT	3 312	81%	0%	18%	2 992	74%	2%	24%
LU	9 057	57%	42%	1%	10 878	50%	49%	1%
HU	9 872	42%	17%	41%	8 570	38%	16%	46%
NL	80 389	65%	31%	4%	80 459	61%	36%	3%
AT	30 117	56%	32%	12%	34 270	48%	39%	13%
PL	23 440	84%	5%	11%	21 371	81%	8%	11%
PT	13 604	75%	24%	0%	14 774	67%	32%	1%
SI	4 836	81%	13%	5%	5 624	79%	15%	6%
SK	9 498	71%	4%	25%	8 516	62%	6%	32%
FI	4 905	79%	10%	11%	4 696	79%	13%	8%
SE	14 746	35%	45%	11%	14 205	25%	54%	11%
UK	26 219	44%	50%	6%	29 611	32%	60%	8%
NO	4 607	43%	52%	5%	6 838	29%	66%	5%

Data availability: See 'Methodological notes'.

Table 2 shows the share of the nationality of the hauliers undertaking international transport at Member State level in 2004. Among the countries with major international trade flows, carriers from the Netherlands accounted for around two thirds of that country's international tonnage. In contrast, French carriers were responsible for only a third of France's international tonnage, while Belgian, Italian, UK and German carriers accounted for less than half of their respective country's total international transport.

The new Member States stood out, notably Poland, with more than two thirds of their international tonnage being handled by their own hauliers. The only exception was Hungary, with Hungarian carriers taking less than half of its international tonnage.

Other Member States achieving high market shares for their own carriers included Finland, Denmark, Spain, Ireland, Austria and Portugal. In contrast, Swedish carriers accounted for less than a third of Swedish international tonnage.

However, it seems that in 2004 the EU was still trading as two separate blocs. For the new Member States, penetration of their international flows comes largely from other new Member States and varies from between one fifth and two fifths for each country's international tonnage, except for the Czech Republic and Slovenia.

The EU-15 had very high levels of penetration of each other's international transport. Belgium, France, Italy, Sweden and the UK all saw half or more of their international transport tonnages taken by carriers from other EU-15 countries. The same held true for Norway, where EU-15 hauliers accounted for well over half of that country's international transport.

In terms of exchanges between the two blocs, the EU-15 countries recording the highest levels of new Member State penetration are Germany, Austria and Sweden, all with more than 10% of their international tonnage taken by new Member State carriers. In contrast, Belgium, the Netherlands, France, Ireland, Luxembourg and Portugal recorded figures less than 5%. Among the new Member States, the countries more open to EU-15 penetration are Slovenia and Hungary with around 15% and the Czech Republic with around 9% of their international tonnage being transported by hauliers from the EU-15.

EU Member States' partners in international road freight transport

Table 3: Goods leaving the country, by main partner, 2004 - 1000 tonnes

Relation with the main partner			
	Main destination	Tonnes to main destination	% of total leaving
BE	FR	30 756	35%
CZ	DE	9 590	40%
DK	DE	6 370	47%
DE	NL	39 936	22%
EE	RU	517	24%
ES	FR	17 794	36%
FR	BE	23 243	23%
IE	UK	6 562	90%
IT	DE	14 117	27%
LV	RU	431	17%
LT	RU	542	17%
LU	DE	2 920	33%
HU	DE	1 744	19%
NL	DE	35 605	44%
AT	DE	13 320	44%
PL	DE	9 218	39%
PT	ES	9 904	74%
SI	IT	1 406	29%
SK	CZ	2 748	29%
FI	SE	2 862	58%
SE	NO	4 305	29%
UK	IE	10 314	40%
NO	SE	2 617	57%

Data availability: See 'Methodological notes'.

Tables 3 and 4 show the main relations for each country for goods entering and leaving in 2004. Germany was the main partner in 17 out of the 44 possible relations. Wherever Germany is a direct neighbour of the partner country, it accounted for some 30% to 50% of the total international tonnage transported, without a common land border Germany's share was around 20% to 30%. Where Germany was not involved, the main partner was normally a near neighbour. Examples of this are Portugal/Spain, Ireland/UK and Sweden with Norway

Table 4: Goods entering the country, by main partner, 2004 - 1000 tonnes

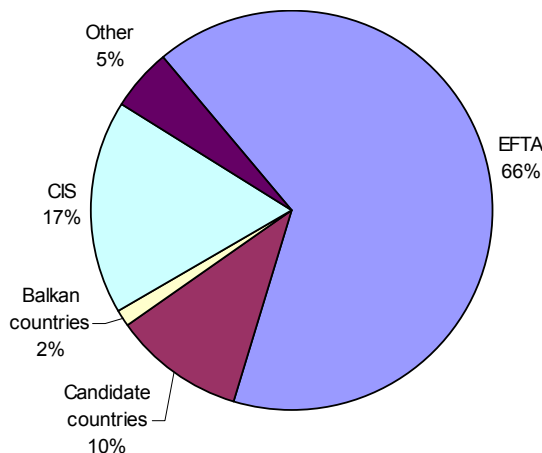
Relation with the main partner			
	Main origin	Tonnes from main origin	% of total entering
BE	FR	23 243	31%
CZ	DE	8 464	42%
DK	DE	6 677	45%
DE	NL	35 605	22%
EE	FI	359	21%
ES	FR	19 726	40%
FR	BE	30 756	28%
IE	UK	10 314	93%
IT	DE	14 031	26%
LV	LT	540	25%
LT	DE	685	23%
LU	DE	3 895	35%
HU	DE	2 167	23%
NL	DE	39 936	50%
AT	DE	18 932	56%
PL	DE	9 046	42%
PT	ES	11 235	75%
SI	IT	1 500	27%
SK	CZ	2 870	33%
FI	SE	2 201	47%
SE	FI	2 862	20%
UK	FR	6 961	23%
NO	SE	4 305	62%

Data availability: See 'Methodological notes'.

and Finland. In the case of Ireland, the UK's share was around 90% in both directions. In contrast, while Ireland was the UK's main destination, it accounted for just 40% of the UK total. Spain accounted for around three quarters of Portugal's goods. The strongest dominance of the main partner is the UK's share in the case of Ireland (90% and 93%) whereas the percentage taken by Germany as Hungary's main partner in both directions (19% and 23%) is the lowest. Russia was the main destination for goods leaving Estonia, Latvia and Lithuania.

Graph 4: Share of other countries as extra EU partners, 2004 - % in tonnes

Total Extra EU transport: 53 million tonnes



Data availability: See 'Methodological notes'.

Graph 4 shows the partner country groupings for extra-EU transport in 2004. EFTA - and here above all Norway and Switzerland - make up two thirds of the total. With a share of 17%, the Commonwealth of Independent States (CIS) is another important grouping, especially for Poland, the Baltic countries and Finland. The Candidate countries account for 10% of the total and the Western Balkan countries for 2%. 5% go to other countries.

EFTA: Iceland, Liechtenstein, Norway and Switzerland

Candidate countries (in 2004): Bulgaria, Croatia, Romania and Turkey

Western Balkan countries: Albania, Bosnia and Herzegovina, the former Yugoslav Republic of Macedonia and Serbia and Montenegro

CIS: Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Russian Federation, Tajikistan, Turkmenistan, Ukraine and Uzbekistan.

Country-to-country flows

Table 5: Country-to-country flows in Intra EU road freight transport, 2004 – Million Tkm

Country of unloading	Country of loading																							
	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	NL	AT	PL	PT	SI	SK	FI	SE	UK
BE		410	231	6 855	90	29	2 289	7 503	17	1 985	-	95	171	374	240	3 983	560	1 104	343	54	271	76	124	844
CZ	797		155	4 802	49	60	1 022	1 087	25	1 005	-	79	95	23	404	800	434	838	18	102	980	33	310	590
DK	558	159		3 272	22	6	873	1 025	16	873	-	52	69	37	66	983	175	538	119	21	127	163	1 105	115
DE	7 282	4 920	3 117		700	195	11 514	11 746	210	12 239	2	659	769	718	1 956	12 783	6 602	7 260	1 822	652	1 697	131	1 337	2 590
EE	58	57	12	457		-	24	35	-	104	-	110	96	-	7	73	37	197	-	6	-	79	64	-
EL	28	0	47	366	-		139	145	-	95	1	-	2	2	41	140	69	38	2	-	61	-	107	228
ES	2 945	923	647	10 548	37	10		14 001	171	6 600	-	210	263	194	350	3 754	751	922	5 510	148	242	119	293	2 424
FR	9 755	1 167	874	12 435	93	28	14 222		174	10 061	0	176	247	670	647	5 207	1 030	1 984	1 821	366	545	26	326	3 020
IE	40	68	15	200	9	-	127	159		137	-	-	9	3	22	128	30	71	18	7	4	-	6	1 668
IT	2 663	1 194	878	11 706	237	59	6 765	10 329	150		0	349	378	243	982	2 982	4 285	1 413	1 242	526	736	78	265	2 117
CY	-	-	-	1	-	1	-	0	-	1		-	-	-	-	4	0	-	-	-	-	-	-	1
LV	32	82	22	498	121	-	98	62	-	185	-		138	-	50	132	26	286	-	-	15	12	47	4
LT	112	164	24	996	122	5	254	234	12	292	-	109		1	58	169	35	413	-	16	51	50	40	135
LU	669	29	26	716	-	14	147	512	5	216	-	-	-		10	164	32	44	52	4	-	3	15	42
HU	390	466	110	2 530	2	43	575	542	12	785	-	56	58	34		477	402	591	71	119	351	80	169	308
NL	3 972	770	543	10 524	193	55	3 377	3 281	124	2 009	1	207	138	177	378		835	1 291	442	81	250	77	655	802
AT	734	674	167	8 482	57	54	872	959	17	2 781	-	66	46	63	400	1 204		305	52	182	231	20	303	467
PL	1 227	926	333	7 070	60	69	1 754	2 045	25	1 805	-	143	310	37	537	1 574	305		77	128	394	56	652	791
PT	451	106	157	2 061	-	49	6 278	1 974	34	1 383	-	11	1	67	40	590	133	158		16	-	1	50	545
SI	139	137	20	725	29	-	202	324	-	577	-	-	4	10	219	186	256	107	41		96	-	23	86
SK	277	958	106	1 379	3	24	495	186	4	539	-	5	27	-	215	311	239	329	11	51		13	100	130
FI	36	67	111	146	68	-	151	34	-	76	-	12	8	3	71	163	20	68	-	20	56		1 187	-
SE	145	505	1 049	1 411	37	113	672	211	35	426	0	53	27	23	107	737	252	575	28	37	80	1 325		17
UK	1 382	1 012	283	3 496	-	29	4 784	4 459	1 247	4 093	3	17	122	106	413	1 325	524	1 419	684	148	267	10	15	

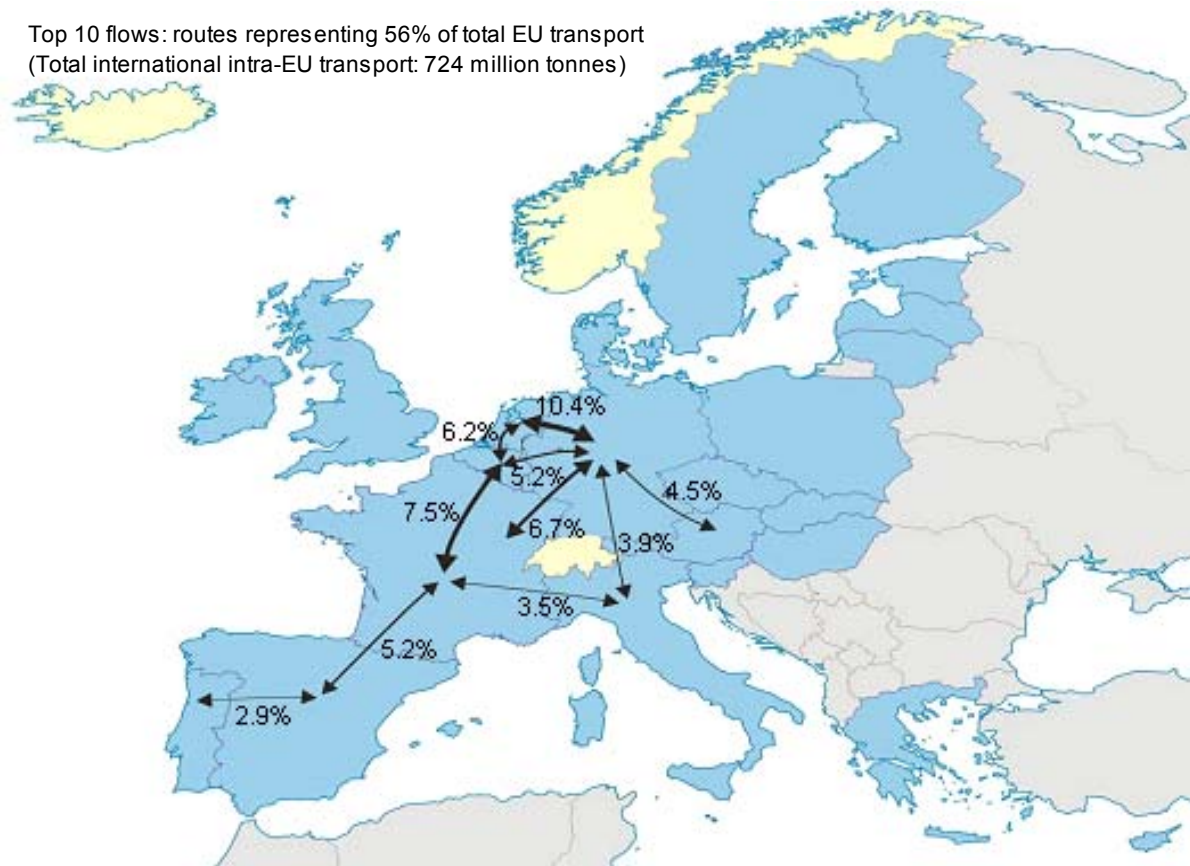
Data availability: See 'Methodological notes'.

Table 5, showing country-to-country flows in tonne-kilometres, illustrates the dominance of Germany as a trading partner on this measure. As a market for other countries' goods, Germany ranks top in 15 out of 23 possible relations, with France accounting for 4 relations, Spain and UK 2 each, and Sweden one. As a supplier, Germany was the main source, again, in 15 out of the 23 relations, with Spain accounting for 3, France and the Netherlands 2 each and Sweden one. This picture reflects Germany's position as the dominant European economy both as a source of manufactured goods and as a market for other countries' products. The

other major economies also figured strongly, particularly France, Italy and Spain. The Netherlands and Belgium with their major port facilities were other important players. The only major economy not to figure prominently was the UK, its island position making road transport interchanges more difficult. When Germany was not the main partner country, it was replaced by a neighbour with a common land boundary with the exception of the UK where France was its main partner across the English Channel. The heaviest flows were those between France and Spain at around 14 billion tonne-kilometres in each direction.

Graph 5: Intra-EU road freight transport, shares of main country-to-country flows, 2004 - % of total (measured in tonnes)

Top 10 flows: routes representing 56% of total EU transport
(Total international intra-EU transport: 724 million tonnes)



Data availability: See 'Methodological notes'.

Graph 5 and Table 6 show the main country-to-country flows of road goods transport in 2004. What is interesting about the overall picture is that international transport is not dominated by a single flow. This suggests that, in transport terms, the EU economy is becoming largely integrated with freight hauliers crossing borders to meet their customer's trans-national operations. However, against that, all the top ten flows were between EU-15 countries and all but one were across a common land border.

Table 6: Main country-to-country flows in Intra-EU international freight transport, 2004 - 1000 tonnes

Rank in 2004	Pair of countries	Total Tonnes	% in total intra EU Tonnes	Rank in 2003
1	DE NL	75 541	10.4%	1
2	BE FR	53 999	7.5%	2
3	DE FR	48 364	6.7%	4
4	BE NL	45 153	6.2%	3
5	BE DE	37 887	5.2%	5
6	ES FR	37 520	5.2%	6
7	AT DE	32 252	4.5%	7
8	DE IT	28 148	3.9%	8
9	FR IT	25 012	3.5%	9
10	ES PT	21 139	2.9%	13

Data availability: See 'Methodological notes'.

This suggests that there is still much scope for further integration and that relatively short distance local movements dominate the scene. The top ten flows accounted for over half the total.

Germany appeared in five of the top ten flows with Germany/Netherlands being the largest, accounting for over 10% of intra-EU international flows. France appeared in four of the top ten flows with flows to Belgium and Germany in second and third places, each accounting for around 7% of the total. One of the bilateral flows featuring neither Germany nor France came fourth with a share of around 6%: flows between Belgium and the Netherlands. Next came flows between Belgium and Germany, Spain and France and Austria and Germany at around 5% each. The only flow in the top ten between countries with no common land border was transalpine transport between Germany and Italy at 4% of the total. Ninth and tenth were flows between France and Italy and Spain and Portugal.

Table 6 also shows that the ranking of the flows remains relatively stable over time. The only changes were the flows between Germany and France swapping places with flows between Belgium and the Netherlands and the entry of the Spain/Portugal flow at number 10, a jump of three places.

➤ 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 present the road goods transport performed by vehicles registered in these countries.

The figures presented in this publication are aggregates of all reporting countries (EU Member States plus Norway).

International transport

In this publication, 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 publication.

Double counting is avoided since reporting relates only to resident carriers of the reporting countries. The figures total the goods dispatched by such resident carriers to all countries of the world and the goods brought into the reporting country by such 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 (movement of goods by road from country A to country B by hauliers registered in country C).

Goods entering a country

The volume of goods entering a country is the sum of international transport and cross-trade unloaded in the country by hauliers from all reporting countries.

Goods leaving a country

The volume of goods leaving a country is the sum of international transport and cross-trade loaded in the country by hauliers from all reporting countries.

'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'.

Greece

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

Malta

No road transport data have been reported by Malta in 2004.

Portugal

Data for 2004 is provisional.

Graph 1 presents volumes moved on the territory of each country if there is loading or unloading of the goods. Transit where neither loading nor unloading takes place in the crossed country, is not included in this graph.

Table 1

New Member States had no obligation to report for years prior their accession in 2004. Therefore, the figures presented for 2000 include international transport reported by EU 15 Member States and the Czech Republic. For 2003 all New Member States except Malta, Poland and Slovenia could be included.

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. Origin and destinations in this publication are derived from goods information (except table 5 which is based on origins and destinations of journeys).

Data availability

The figures presented in this publication have been extracted from Eurostat's free dissemination database and reflect the state of data availability as of the beginning of August 2005.

Due to incomplete coverage, 2003 figures have been used for the Netherlands, Austria and the United Kingdom for 2004.

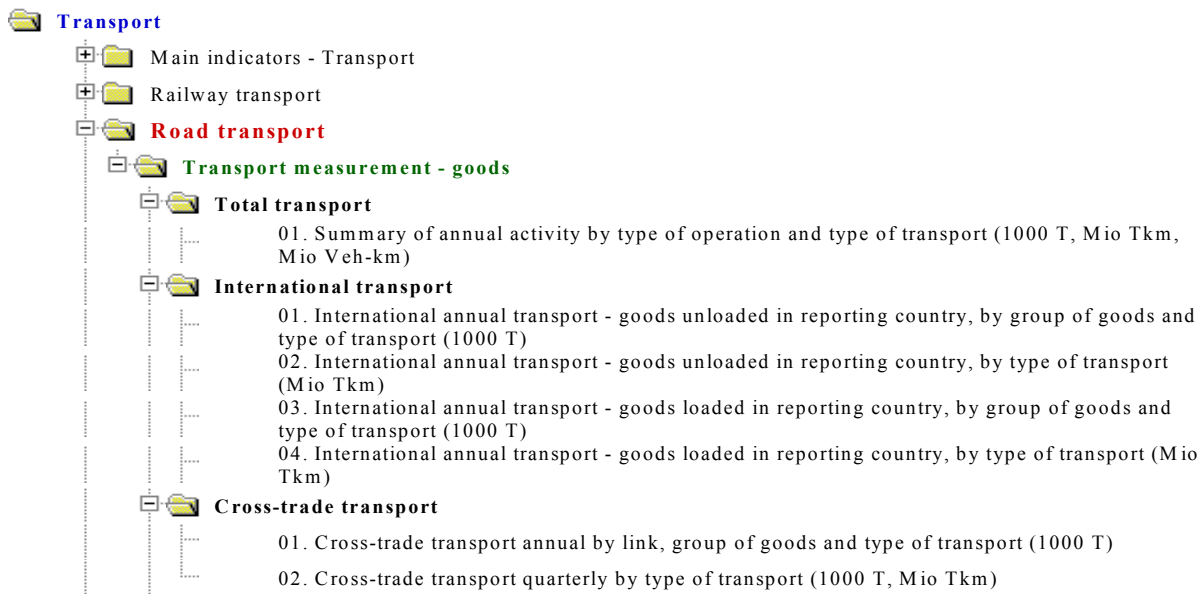
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