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Statistics in focus
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Six years of road freight growth lost to the crisis

Trends in EU road freight transport

The economic crisis has cancelled out 6 years of growth in European road freight transport.

The first signs of growth returning to European road freight transport were apparent in the first and second quarters of 2010, although the second quarter of 2010 was still 9% below the level of the second quarter of 2008.

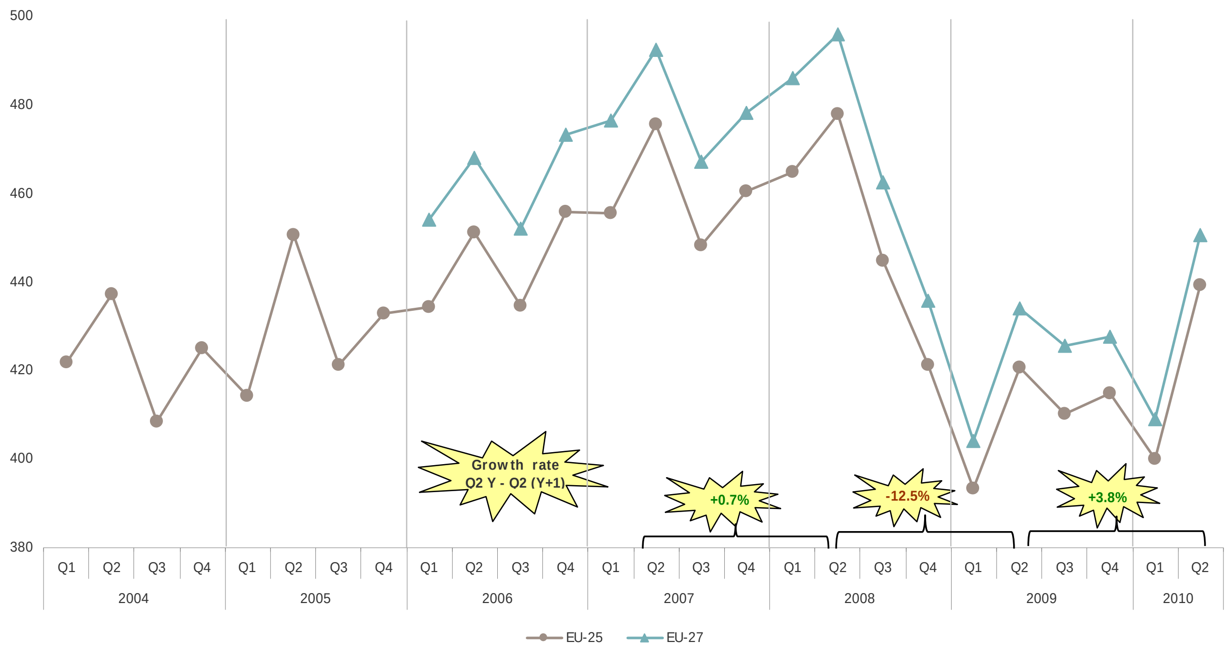
2009 saw a major decline of 10% in total European road freight transport compared with 2008. Within the total, international transport recorded the sharpest decline (-15% for EU-27), followed by national transport (-9%). In contrast, cabotage grew by 2%.

Over the longer run, the Polish road freight industry has been a clear leader in terms of progress in all categories of international transport: international, cross-trade and cabotage. Between 2004 and 2009, Polish international transport grew by more than 80%. At the total transport level, the Polish industry has entered the top 3 countries.

In terms of the types of products carried, the changes between 2009 and 2008 reflect the difficulties of Europe's respective economic sectors. Metal ores and other mining and quarrying products were by far the most significant products in terms of tonnes, whereas in terms of tonne-kilometres (tkm), food, beverages and tobacco stood out.

Transport of dangerous goods declined sharply in 2009 compared with 2008.

Figure 1: Evolution of EU quarterly road freight transport, Q1 2004-Q2 2010 - billion tkm

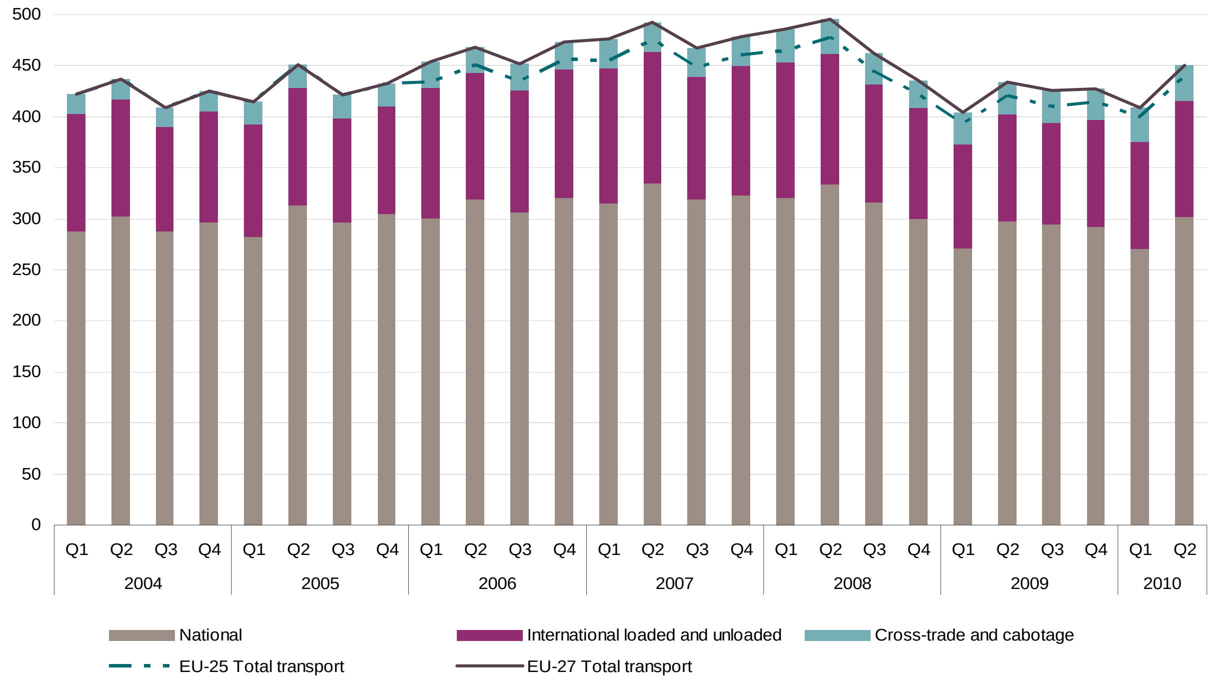


EL, IT, UK Q1 2010: Q1 2009 data was used

Source: Eurostat (online data code: road_go_tq_tott)

Road freight transport returns to growth in the first half of 2010

Figure 2: EU-27 quarterly road freight transport, Q1 2004-Q2 2010 - billion tkm

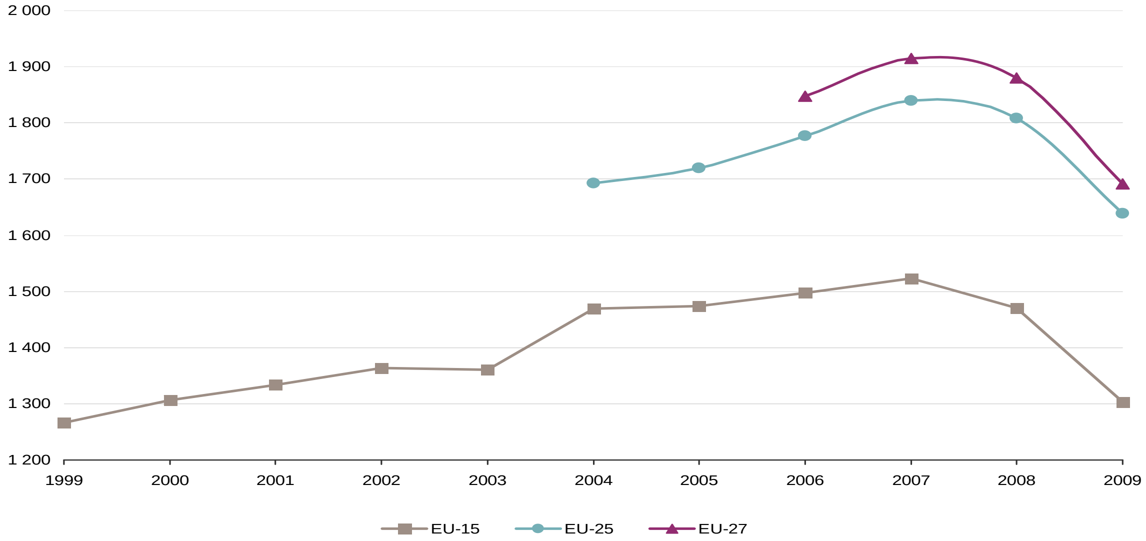


2004 and 2005 exclude BG and RO; EL, IT, UK Q1 2010: Q1 2009 data was used.
Source: Eurostat (online data code: road_go_tq_tott)

As Figure 1 and Figure 2 illustrate, there was a very sharp 12% decline in EU road freight transport between the second quarter of 2008 and the second quarter of 2009, showing the effects of the economic crisis. Within the total, cross-trade and cabotage held up the best with a fall of 8% between the same periods. For the rest of 2009, freight transport stabilised but still at levels below the corresponding quarters in 2008.

Figure 3 shows that the broad pattern is similar at EU-27, EU-25 and EU-15 levels, although the strengthening of the Polish road haulage industry and the recent difficulties of the Romanian industry mean that the performance in terms of tkm trends at the EU-25 level is a little better than the one at EU-15 and EU-27 levels.

Figure 3: Evolution of EU annual road freight transport, 1999-2009 - billion tkm



EL 1999 to 2002: 2003 data was used; SE 1999: 2000 data was used.
Source: Eurostat (online data code: road_go_ta_tott)

In the second quarter of 2010, European road freight transport grew by some 4% compared with the same quarter of 2009. This is the first such increase observed since the second quarter of 2008, when the economic crisis struck.
Long term time series analysis illustrated in Figure 3 shows that total EU-15 road freight transport has stabilised at levels just above those recorded in 2000. The crisis has therefore effectively cancelled out 6 years of growth in road transport recorded between 2000-2002 and 2003-2007.
A close-up on 2009 figures, presented in Table 1, shows a 10% fall compared with 2008 at EU-27 level and an even sharper one for the EU-15 at – over 11%. The only two Member States which recorded growth in time of crisis were Poland (nearly +10%) and Bulgaria, which recorded an impressive +16%.

International transport suffers most from the economic downturn

Table 1: Road freight transport by type of operation, 2008-2009 - million tkm

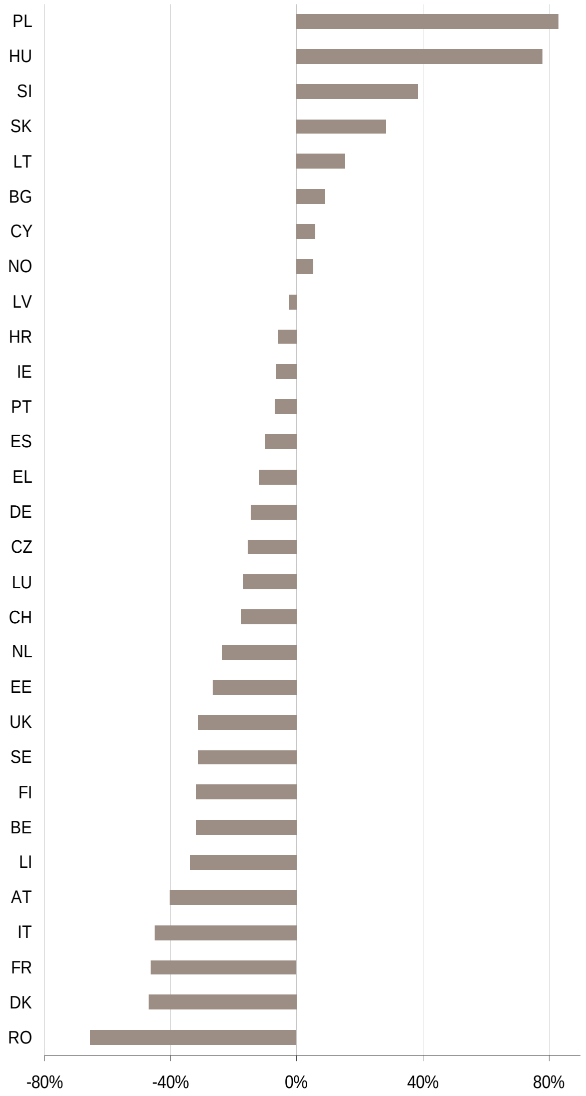
	2008					2009					Change 2008-2009				
	National	International	Cross-trade	Cabotage	**Total**	National	International	Cross-trade	Cabotage	**Total**	National	International	Cross-trade	Cabotage	**Total**
EU-15	1 120 986	299 534	34 801	14 695	1 470 016	1 007 199	253 318	30 460	12 482	1 303 459	-10.2%	-15.4%	-12.5%	-15.1%	-11.3%
EU-25	1 238 873	448 264	104 302	17 104	1 808 543	1 126 904	392 847	102 539	16 877	1 639 167	-9.0%	-12.4%	-1.7%	-1.3%	-9.4%
EU-27	1 269 185	486 150	107 578	17 338	1 880 251	1 154 089	411 704	107 761	17 625	1 691 179	-9.1%	-15.3%	0.2%	1.7%	-10.1%
BE	18 207	16 265	2 339	1 546	38 357	17 603	15 066	2 047	1 458	36 174	-3.3%	-7.4%	-12.5%	-5.7%	-5.7%
BG	7 122	5 786	2 277	137	15 322	6 306	6 934	3 848	655	17 743	-11.5%	19.8%	69.0%	378.1%	15.8%
CZ	15 748	25 123	9 713	293	50 877	13 480	21 618	9 492	364	44 954	-14.4%	-14.0%	-2.3%	24.2%	-11.6%
DK	10 718	8 252	255	254	19 479	10 002	6 230	387	257	16 876	-6.7%	-24.5%	51.8%	1.2%	-13.4%
DE	264 545	65 614	8 592	2 781	341 532	245 568	53 800	6 395	1 785	307 548	-7.2%	-18.0%	-25.6%	-35.8%	-10.0%
EE	1 832	3 963	1 343	216	7 354	1 326	2 512	1 294	207	5 339	-27.6%	-36.6%	-3.6%	-4.2%	-27.4%
IE	13 265	3 187	377	573	17 402	9 192	2 870	379	346	12 787	-30.7%	-9.9%	0.5%	-39.6%	-26.5%
EL	24 346	4 458	28	18	28 850	24 228	4 337	18	2	28 585	-0.5%	-2.7%	-35.7%	-88.9%	-0.9%
ES	175 184	64 270	2 445	1 085	242 984	151 060	56 500	2 801	1 534	211 895	-13.8%	-12.1%	14.6%	41.4%	-12.8%
FR	181 879	23 466	530	429	206 304	156 021	16 802	465	333	173 621	-14.2%	-28.4%	-12.3%	-22.4%	-15.8%
IT	151 823	26 554	1 036	1 049	180 461	145 610	20 255	1 088	675	167 628	-4.1%	-23.7%	5.0%	-35.7%	-7.1%
CY	1 296	12	-	-	1 308	944	18	-	-	962	-27.2%	50.0%	-	-	-26.5%
LV	2 536	5 812	3 945	50	12 343	2 149	3 718	2 090	158	8 115	-15.3%	-36.0%	-47.0%	216.0%	-34.3%
LT	2 560	9 375	8 409	75	20 419	2 633	7 670	7 384	70	17 757	2.9%	-18.2%	-12.2%	-6.7%	-13.0%
LU	603	2 426	3 993	2 360	9 382	530	2 045	3 484	2 341	8 400	-12.1%	-15.7%	-12.7%	-0.8%	-10.5%
HU	13 043	15 407	7 141	168	35 759	12 171	14 622	8 295	285	35 373	-6.7%	-5.1%	16.2%	69.6%	-1.1%
NL	32 009	36 195	7 391	2 563	78 158	31 337	32 166	6 905	2 266	72 674	-2.1%	-11.1%	-6.6%	-11.6%	-7.0%
AT	14 581	15 140	3 950	642	34 313	13 491	11 902	3 039	643	29 075	-7.5%	-21.4%	-23.1%	0.2%	-15.3%
PL	71 917	67 492	24 567	954	164 930	79 207	70 436	28 497	2 601	180 741	10.1%	4.4%	16.0%	172.6%	9.6%
PT	17 114	18 056	3 035	886	39 091	14 424	17 907	2 983	494	35 808	-15.7%	-0.8%	-1.7%	-44.2%	-8.4%
RO	23 190	32 100	999	97	56 386	20 879	11 923	1 374	93	34 269	-10.0%	-62.9%	37.5%	-4.1%	-39.2%
SI	2 636	8 612	4 624	389	16 261	2 276	7 401	4 725	360	14 762	-13.7%	-14.1%	2.2%	-7.5%	-9.2%
SK	6 319	12 934	9 759	264	29 276	5 519	11 534	10 302	350	27 705	-12.7%	-10.8%	5.6%	32.6%	-5.4%
FI	27 615	3 254	123	44	31 036	24 394	3 275	86	49	27 804	-11.7%	0.6%	-30.1%	11.4%	-10.4%
SE	37 952	3 614	582	222	42 370	32 123	2 517	251	156	35 047	-15.4%	-30.4%	-56.9%	-29.7%	-17.3%
UK	151 145	8 783	125	243	160 296	131 616	7 646	132	143	139 537	-12.9%	-12.9%	5.6%	-41.2%	-13.0%
LI	-	79	239	10	328	-	57	193	12	262	-	-27.8%	-19.2%	20.0%	-20.1%
NO	16 658	3 876	15	47	20 596	15 277	3 105	35	30	18 447	-8.3%	-19.9%	133.3%	-36.2%	-10.4%
CH	9 813	3 423	400	275	13 911	9 697	2 818	346	313	13 174	-1.2%	-17.7%	-13.5%	13.8%	-5.3%
HR	6 445	3 850	746	c	11 041	5 125	3 622	679	-	9 426	-20.5%	-5.9%	-9.0%	:	-14.6%

Source: Eurostat (online data code: road_go_ta_tott)

At the EU-27 level, the overall fall in total transport reflected a decline of 9% in national transport, a 15% fall in international transport, stable cross-trade and a rise of 2% in cabotage. This rise in cabotage, despite the economic crisis, was the result of a significant growth in the cabotage performed by Bulgarian hauliers, rising from 137 million tkm in 2008 to 655 million tkm in 2009, as well as the impressive growth recorded by Latvia and Poland. The latter has now become the biggest caboteur in the EU, followed by Luxembourg, Netherlands and Germany. The lifting of the special restrictions on road cabotage for most of the new Member States as from 1 May 2009 probably played a major role here.

Overall, except for international transport, EU-15 hauliers were hit more than the newer entrants. This suggests that the new Member States have become strong players on the road freight market, capable of maintaining and even strengthening their position despite a general economic downfall.

Figure 4: International transport loaded and unloaded, 2009 compared with 2004 - % of tkm



BG, RO 2004: 2006 data was used; LI 2004: 2005 data was used; CH and HR 2004: 2008 data was used.

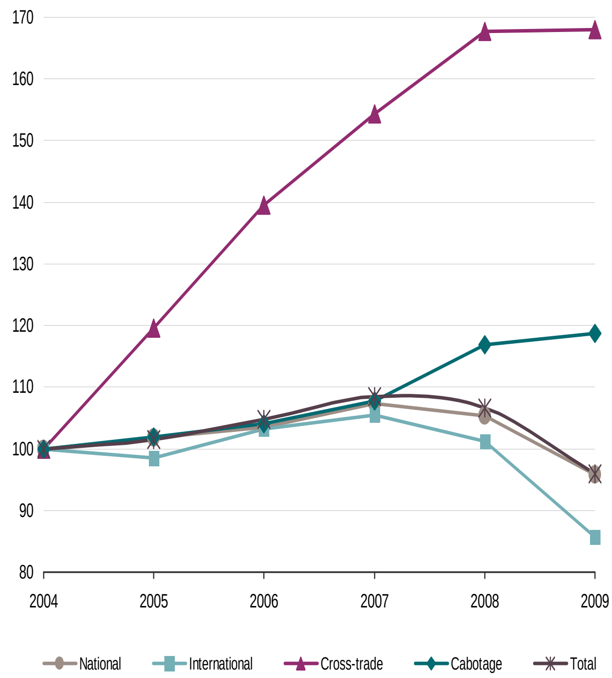
Source: Eurostat (online data code: road_go_ta_tott)

The same theme is taken up in Figure 4, which shows the change in international transport by country between 2004, the year of accession of 10 new Member States and the situation 5 years later, in 2009. Broadly speaking, the new Member States have increased their international traffic, particularly Poland and Hungary, both with rises of around 80%. Slovenia and Slovakia have also grown their international transport at 38% and 28% respectively. A notable exception to this trend is Romania, where the impact of the crisis has been particularly severe.

In contrast, all the EU-15 Member States have seen their international transport decline between 2004 and 2009, with Denmark, France, Italy and Austria suffering declines of over 40%. These changes illustrate well the increasing competition on the road freight market since 2004, which has been further accentuated by the recent economic crisis.

Figure 5 shows there has been greater use of cross-trade transport and cabotage, displacing international and national transport respectively. Between 2004 and 2009, cross-trade has grown spectacularly by over 60% despite a stabilisation in 2009. In contrast, international transport remained at first relatively flat, (+ 5% between 2004 and 2007) before falling sharply in the subsequent 2 years to be 14% down by 2009. Cabotage and national transport displayed similar patterns up to 2007, rising by some 7% compared with 2004. Thereafter, however, cabotage has grown substantially, by almost 20% compared with 2004, while national transport has fallen back to end up 4% down. Over the same period, the total road freight transport decreased by 4%.

Figure 5: Evolution of EU-27 road freight transport, 2004-2009 - based on tkm (2004=100)



BG, RO 2004 and 2005: 2006 data was used

Source: Eurostat (online data code: road_go_ta_tott)

Weak industrial activity has clear repercussions on road transport of goods

Table 2: EU-27 total transport by group of goods, 2008-2009 – tonnes and tkm

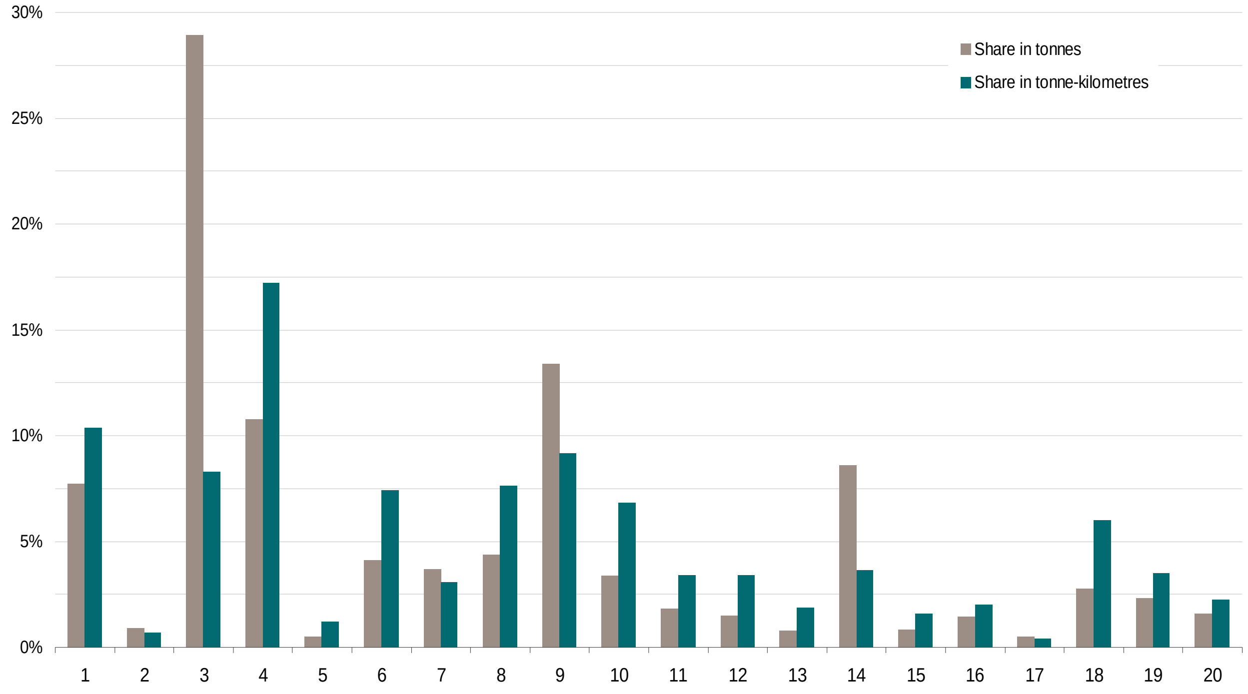
Group	NST 2007	Thousand Tonnes			Million Tonne-kilometres		
		2008	2009	Change 2008-2009	2008	2009	Change 2008-2009
01	Products of agriculture, hunting, and forestry; fish and other fishing products	1 142 592	1 169 292	2.3%	175 820	174 807	-0.6%
02	Coal and lignite; crude petroleum and natural gas	155 998	140 908	-9.7%	12 304	11 513	-6.4%
03	Metal ores and other mining and quarrying products; peat; uranium and thorium	5 261 551	4 385 456	-16.7%	162 625	139 319	-14.3%
04	Food products, beverages and tobacco	1 673 201	1 628 060	-2.7%	295 319	290 338	-1.7%
05	Textiles and textile products; leather and leather products	69 867	73 582	5.3%	23 474	20 227	-13.8%
06	Wood and products of wood and cork (except furniture); articles of straw and plaiting materials; pulp, paper and paper products; printed matter and recorded media	697 740	621 227	-11.0%	136 987	125 127	-8.7%
07	Coke and refined petroleum products	613 719	559 277	-8.9%	56 880	51 685	-9.1%
08	Chemicals, chemical products, and man-made fibres; rubber and plastic products ; nuclear fuel	753 922	663 000	-12.1%	138 506	128 802	-7.0%
09	Other non metallic mineral products	2 339 494	2 029 585	-13.2%	177 363	154 258	-13.0%
10	Basic metals; fabricated metal products, except machinery and equipment	662 041	515 282	-22.2%	144 175	115 013	-20.2%
11	Machinery and equipment n.e.c.; office machinery and computers; electrical machinery and apparatus n.e.c.; radio, television and communication equipment and apparatus; medical, precision and optical instruments; watches and clocks	360 495	278 329	-22.8%	72 136	57 854	-19.8%
12	Transport equipment	268 555	223 220	-16.9%	69 400	57 435	-17.2%
13	Furniture; other manufactured goods n.e.c.	155 890	123 585	-20.7%	43 573	31 492	-27.7%
14	Secondary raw materials; municipal wastes and other wastes	1 275 465	1 304 515	2.3%	60 665	61 172	0.8%
15	Mail, parcels	121 307	128 527	6.0%	25 545	26 829	5.0%
16	Equipment and material utilized in the transport of goods	246 136	216 865	-11.9%	37 495	33 761	-10.0%
17	Goods moved in the course of household and office removals; baggage and articles accompanying travellers; motor vehicles being moved for repair; other non market goods n.e.c.	57 093	72 067	26.2%	6 537	7 094	8.5%
18	Grouped goods: a mixture of types of goods which are transported together	527 577	418 648	-20.6%	119 037	101 119	-15.1%
19	Unidentifiable goods: goods which for any reason cannot be identified and therefore cannot be assigned to groups 01-16.	403 891	352 499	-12.7%	70 931	58 738	-17.2%
20	Other goods n.e.c.	273 868	243 847	-11.0%	42 875	37 578	-12.4%

Source: Eurostat (online data code: road_go_ta_tg)

The analysis of the road transport by type of product, illustrated in Table 2, shows the impact of the economic crisis on the European industry in terms of the reduction in goods transported by road between 2008 and 2009. The decline in construction activity had a major impact on the transport of building materials, sand, gravel, cement and glass. Similarly, the decline in the engineering industry caused a decline in the delivery of raw materials such as iron and steel, but also in the delivery of products such as computers, vehicles, televisions and radios. In contrast to these changes, the transport of agricultural outputs was little affected with the same being true for food products, beverages and tobacco. At the same time, there was an upsurge in household and office removals, showing a growth of 26% in tonnes and nearly 9% in tonne-kilometres, though this is a relatively small group. The only other group of goods with a clear upward trend in both tonnes and tkm were mail and parcels, although there was also a slight increase in the group containing municipal and other waste. Textiles and leather products recorder a 5% rise in tonnes, but have fallen by 14% in tkm.

Figure 6 shows the wide differences between the importance for the various product groups, depending on whether transport is measured in tonnes or tonne-kilometres. Measurement in tonnes gives prominence to heavy products like building materials and raw materials such as sand, gravel, ores and cement. These items typically tend to be transported over short distances from the nearest quarry or cement plant to the building site concerned, whereas tonne-kilometres, which combine tonnage of goods with distance travelled, bring food products, beverages and tobacco clearly to the fore. This is because these products are manufactured in a limited number of locations and then dispatched over long distances. A similar pattern emerges for the products of agriculture, forestry and fishing. Here, there are strong regional variations in production between southern and northern Europe, with southern Europe excelling in fresh vegetables and fruit while northern Europe provides mainly timber, paper and fish, with a consequent movement of these products over long distances. Other non metallic mineral products remain high on the list of main products both in terms of tonnes and tonne-kilometres. This may partly be explained by the inclusion of glass in this group – a product where production has become concentrated in relatively few sites in order to benefit from the economies of scale – which implies movements over long distances.

Figure 6: Share by group of goods in EU-27 total transport, 2009 - tonnes and tkm



Source: Eurostat (online data code: road_go_ta_tg)

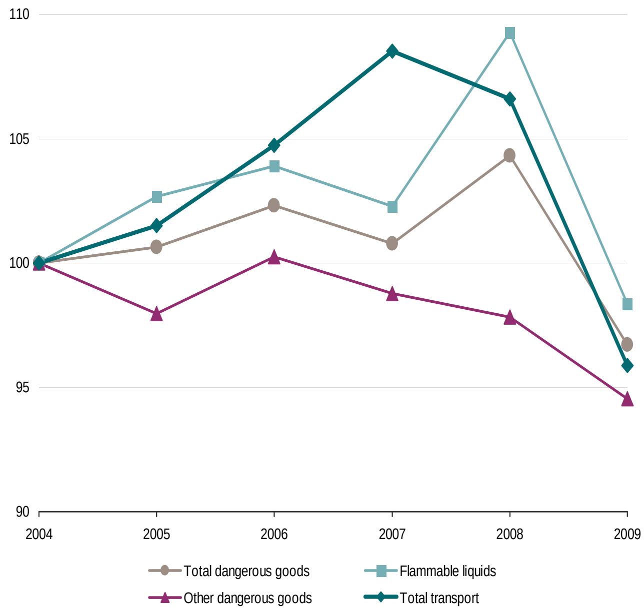
Information collected on the transport of dangerous goods covers explosives, gases and flammable liquids and solids, toxic and corrosive substances, radioactive material and indeed any material or substance of which involvement in an accident is likely to trigger major safety and security concerns.

Road freight transport of all classes of dangerous goods has declined sharply in 2009 and ended up almost 4% lower than its level in 2004 – similar to the total of road freight transport over the same period.

Flammable liquids suffered a sharper fall between 2008 and 2009 than other dangerous goods, but its fall has been smaller over the longer term, at 1.5% below its 2004 level. In contrast, the trend for other dangerous goods has been clearly downwards since 2006 and in 2009 it ended up some 6% lower than in 2004.

It should be kept in mind, however, that the methodology used for the collection of data on the transport of dangerous goods implies that there are considerable uncertainties attached to those figures, which should be therefore interpreted with care.

Figure 7: Evolution of EU-27 transport of dangerous goods, 2004-2009 - based on tkm (2004=100)



IE 2009: 2008 data was used; BG, RO 2004 and 2005: 2006 data was used; HU 2004, 2005 and 2006: 2007 data was used

Source: Eurostat (online data code: road_go_ta_dg)

METHODOLOGICAL NOTES

Data presented in this publication were collected in the framework 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, Croatia, Liechtenstein, Norway and Switzerland, and record the road goods transport undertaken by vehicles registered in these countries.
Reporting countries 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. At the European level, common aggregation procedures have been used that might diverge from national practices. Therefore differences might occur between the figures in this publication and national values. For the distinction between national and international transport, journey related information is used at the European level, which might cause differences in corresponding values from those countries that are using goods related information for these statistics.

Bulgaria and Romania: While Bulgaria and Romania had no obligation to report prior to their accession in 2007, they started to report data for the reference year 2006.

Italy: As road transport data for Q1 and Q2 2010 have not yet been reported, Q1 and Q2 2009 have been used instead.

Hungary: Hungary started to report data on dangerous goods for the reference year 2007.

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

Liechtenstein: Liechtenstein reports only international road freight.

EU-27 totals calculated in this publication refer to road freight transport reported by the 27 Member States excluding Malta which is not reporting road freight statistics.

International transport loaded and unloaded
International transport as presented in this publication 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: the figures sum up the goods transported by resident carriers to all other countries of the world and the goods brought into the reporting country by resident carriers from all other countries of the world.

Cross-trade transport
Cross-trade transport is defined as international road transport between two countries 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).

Cabotage transport
Cabotage is declared by Member States for hauliers registered in their country performing transport on the national territory of another country.
Cabotage was 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 was liberalized in May 2009.

Breakdown by goods groups
Starting with the reference year 2008, Commission Regulation (EC) No 1304/2007 amends Council Regulation (EC) No 1172/98 and establishes NST 2007 as the sole classification for goods carried in road freight transport. Germany still collects data according to NST/R but re-classifies them according to NST 2007 before the submission to Eurostat.
For detailed information on the NST 2007 classification, please refer to 'Ramon', Eurostat's Metadata Server).

Dangerous goods
Council Regulation (EC) 1172/98 stipulates the collection of information on different categories of dangerous goods on an obligatory basis. Annex E of the Council Regulation (EC) 1172/98 provides the categories to be used.
As the carriage of dangerous goods by road represents only a small percentage of total road transport and the data are collected on the basis of sample surveys, the margins of error in any statistics will be substantial. Any figures for the transport of dangerous goods should be treated with caution.

Tonne-kilometre (tkm)
Unit of measure of goods transport that represents the transport of one tonne by road over one kilometre.
The distance taken into account is the distance actually run. It excludes the distance covered when the goods road vehicle is being transported by another means of transport.

Economic activity
The economic activity considered here is the main economic activity of the business performing the transport of goods. It is reported according to NACE rev. 2.

Data availability
The figures presented in this publication have been extracted from Eurostat's free dissemination database and reflect the state of data availability on the 11/02/2011.

Country codes
EU-27: European Union of 27 Member States from 1 January 2007: Belgium (BE), Bulgaria (BG), the Czech Republic (CZ), Denmark (DK), Germany (DE), Estonia (EE), Ireland (IE), Greece (EL), Spain (ES), France (FR), Italy (IT), Cyprus (CY), Latvia (LV), Lithuania (LT), Luxembourg (LU), Hungary (HU), Malta (MT), the Netherlands (NL), Austria (AT), Poland (PL), Portugal (PT), Romania (RO), Slovenia (SI), Slovakia (SK), Finland (FI), Sweden (SE) and the United Kingdom (UK).
Candidate countries and EFTA countries: Croatia (HR), Liechtenstein (LI), Norway (NO), Switzerland (CH).

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This publication was prepared with the assistance of Richard Butchart and Marie-Noëlle Dietsch.

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