

Transport Business Statistics

440 thousand road haulage enterprises in the EU employ 1.7 million persons and contribute a 'value added' of 66 billion ECU

Statistics

in focus

INDUSTRY, TRADE AND SERVICES

THEME 4 – 7/1999

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Road freight transport plays a dominant role in freight transport in Europe. 'Freight transport by road' is a profitable part of the transport sector. It comprises road freight transport and road haulage. Other transport sectors are railways, water, air, and 'supporting and auxiliary activities'

When comparing the road haulage sector with the transport sector as a whole, we can draw the following conclusions:

- Road freight transport enterprises have fewer persons employed per enterprise.
- The share of self-employed is 26%, compared to 10% for the transport sector.
- The turnover per person employed is much lower.
- The labour productivity (the value added at factor cost / personnel costs) is much higher.

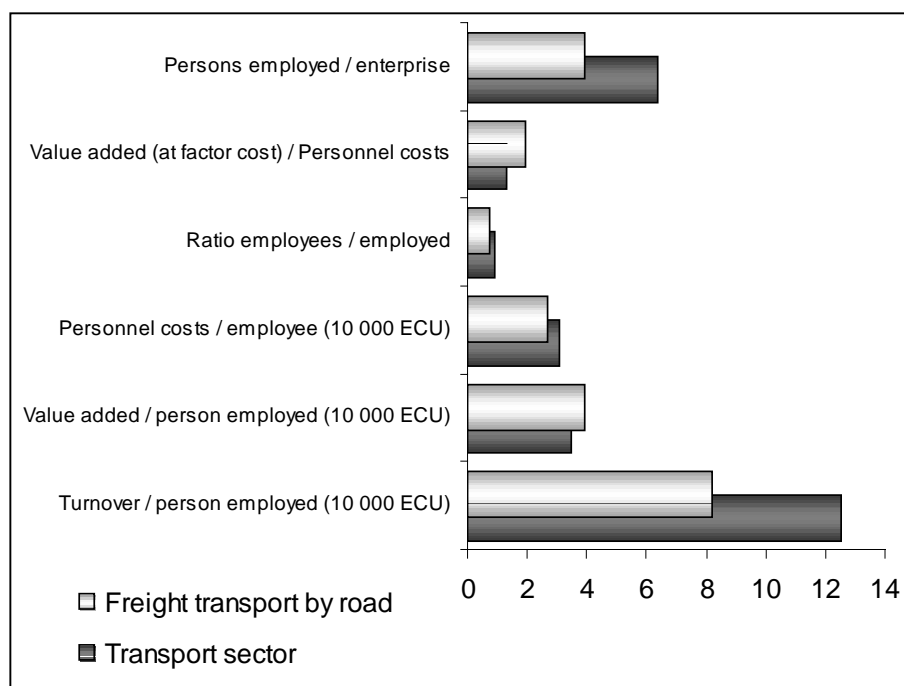


Figure 1: Main road haulage indicators compared to the transport sector as a whole

- The value added (at factor cost) per person employed is higher.
- Personnel costs per employee are lower.



1.7 million persons employed in the EU. 3.9 persons employed per road haulage enterprise in the EU – 39% lower than in the transport sector. 26% self-employed

In 1995 the European Single Market numbered more than 142 million persons occupied, 94 million of them in market and non-market services. Market services alone gave work to almost 65 million people in the EU in 1995. Transport services employed 6.5 million persons. The road haulage enterprises in the EU employed 1.7 million persons*.

The average number of employed per enterprise for the EU road haulage sector is 3.9 persons, 39% lower than the average in the transport sector.

We find that the large Spanish enterprise population is made up of comparatively small companies. The average number of persons employed per haulage enterprise in Spain is equal to 1.8 persons, the lowest number among all Member States.

This may be compared with the French and German averages, which are 7.4 and 7.7 persons per enterprise respectively. France and Germany are the two Member States with the highest number of persons employed in this sector. The EU average is 3.9 persons. At the top of the ranking there are two Member States with more than 10 persons per enterprise on average, the Netherlands and Luxembourg. The 'central' location in the internal market may explain this.

Year	Average number of persons employed per enterprise			Ratio employees/employed	Average number of employed per enterprise in 1995
	Number of persons employed (thousands)	Average number of persons employed per enterprise	Ratio employees/employed		
EU-15	1 700	3.9	0.74	6.4	
EUR-11	1 400	3.9	0.67	6.7	
B 1995	50	:	0.87	6.7	
DK 1993	35	3.6	0.64	4.2	
D 1996	268	7.7	0.88	8.8	
EL	:	:	:	2.1	
E 1993	241	1.8	0.47	3.7	
F 1994	262	7.4	0.90	8.8	
IRL 1996	9	4.0	0.72	:	
I 1995	269	2.4	0.50	6.6	
L 1995	4	10.8	0.91	15.7	
NL 1993	106	13.2	0.83	13.2	
A 1995	35	7.3	0.91	12.1	
P	:	:	:	7.1	
FIN 1995	28	2.5	0.77	3.8	
S 1994	:	:	:	:	
UK	:	:	:	:	

Table 1: Average number of employed per enterprise and the share of the number of employees in the total number of persons employed

We conclude that road haulage companies, at EU level, are 39% smaller in number of persons employed, than in the transport sector as a whole.

This can be explained by the high number of self-employed (26% in the EU) within this sector.

The share of self-employed persons is lowest in Luxembourg and Austria. On the other hand for Spain and Italy, the shares are high.

For Spain, employees account for only 47% of the total number of persons employed. In other words, there is a large degree (53%) of self-employed in this sector. In Italy the share is 50%. In both countries the average number of employed per enterprise is very low. There is however one country, Finland, with a low average of persons employed per enterprise, but with a lower share of self-employed (23%).

In the Netherlands the share of self-employed is 33% smaller than the EU average, but the number of persons employed per enterprise is nearly four times bigger. This could be explained by a large number of part-timers.

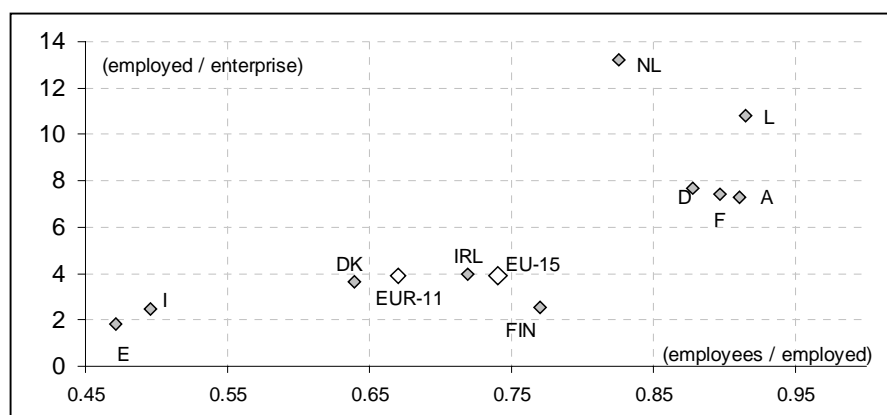


Figure 2: Relationship between average number of persons employed per enterprise and the share of the number of employees in the total number of persons employed

* These 1.7 million persons employed in the road haulage sector only relate to hire and reward transport. Own account, which employs approximately 1 million persons, is not included.

In the EU there are 1.3 million employees in the road haulage sector, 74% of them within the euro-zone.

Within the EU there are 1.3 million employees in the road haulage sector. This represents 28% of the workforce in the transport sector or 1.0% of the whole workforce. In addition to these 1.3 million employees, there are 400 thousand self-employed in this sector.

Two Member States, France and Germany, are noteworthy in number of employees reporting 235 thousand each. These two countries together with Italy, which is the third with 133 thousand, account for nearly half the workforce within this sector.

About 28% of the employees in the transport sector work with road haulage. The country where this sector has the largest importance is Denmark with 45% of the transport employees. Next is Belgium with 38% followed by the Netherlands with 36%.

In Austria, only 20% of the transport employees work in this sector. This could be explained by a relatively high number of employees in passenger transport.

Year	Number of employees (thousands)		
	Freight transport by road	% of Transport sector	% of All economic sectors
EU-15	1 300	28%	1.0%
EUR-11	940	28%	1.0%
B 1995	44	38%	1.4%
DK 1993	23	45%	1.0%
D 1996	235	:	0.7%
EL	:	:	:
E 1993	114	28%	1.3%
F 1994	235	30%	1.2%
IRL 1996	7	:	0.7%
I 1995	133	22%	0.9%
L 1995	4	35%	2.5%
NL 1995	88	36%	1.5%
A 1995	32	20%	1.0%
P	:	:	:
FIN 1995	22	32%	1.3%
S 1994	42	31%	1.2%
UK	:	:	:

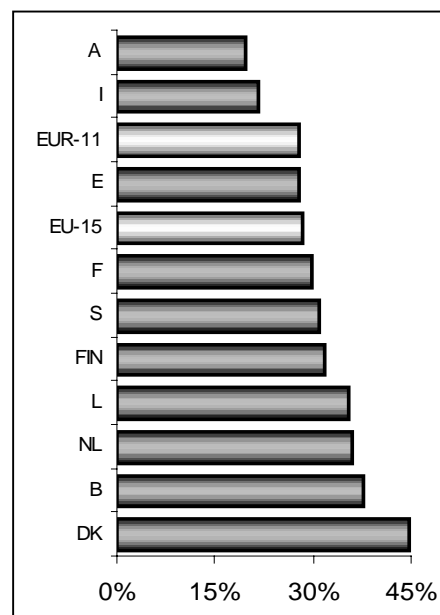


Table 2: Number of employees for the road haulage sector.

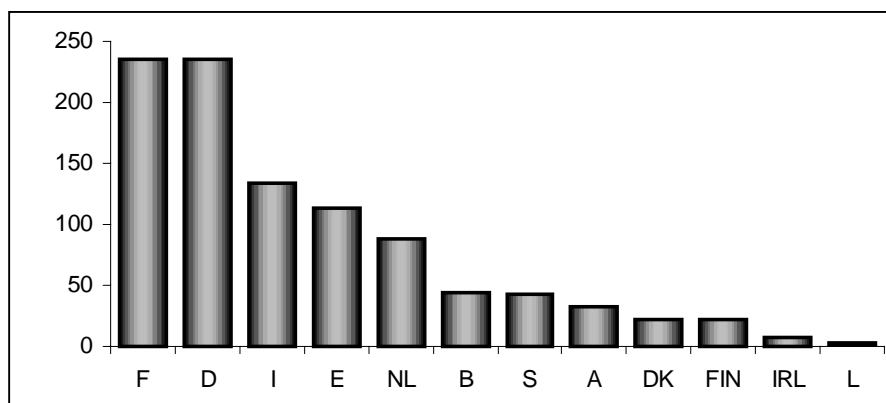


Figure 3: Number of employees for the road haulage sector

Figure 4: Number of employees for the road haulage sector – share of the whole transport sector

About 1.0% of the total workforce are employees in the road haulage sector. Here the largest importance among individual Member States occurs in Luxembourg, with 2.5% road haulage employees among the total workforce. In Germany and Ireland, only 0.7% of all the employees work in the road-hauling sector.

140 billion ECU of turnover in the road haulage sector in the EU, 79% of it within the euro-zone. Turnover per person employed 82 thousand ECU, 34% lower than in the transport sector as a whole.

Year	Turnover (million ECU)	Share of transport sector	Turnover per person employed (1000 ECU)	Turnover per person employed (1000 ECU) in 1995
	Freight transport by road		Transport sector	
EU-15	140 000	30%	82	125
EUR-11	110 000	29%	81	125
B 1995	6 346	28%	126	179
DK 1993	2 856	26%	81	164
D 1996	21 439	:	80	:
EL	:	:	:	62
E	:	:	:	:
F 1994	21 022	27%	80	91
IRL 1996	647	:	68	:
I 1995	21 913	33%	82	82
L 1995	421	35%	107	110
NL 1995	7 458	32%	70	87
A 1995	3 141	19%	90	96
P	:	:	:	60
FIN 1995	2 537	27%	90	116
S 1995	5 499	24%	:	:
UK 1996	20 612	37%	:	:

Table 3: Turnover in the 'Freight transport by road' sector

Four countries share the same level of turnover in the road haulage sector. Italy, Germany, France and United Kingdom reach a turnover around 21 billion ECU each. This represents 61% of the turnover for all EU countries.

These countries set the EU benchmark for turnover per person employed around 82 thousand ECU. This is a value substantially lower than for the whole transport sector. The turnover per person employed in the EU transport sector is about 125 thousand ECU. It is only in Italy where we find the turnover at the same level for road haulage as for the whole transport sector (82 thousand ECU per person employed). The highest level of turnover is found in Belgium with 126 thousand ECU per employed. For the transport sector the lowest level is in Portugal (60 thousand per person employed), but no data is available for the road haulage sector.

The importance of road haulage turnover in the transport sector is highest in Luxembourg (35%), Italy (33%) and the Netherlands (32%). For the EU the importance is about 30%.

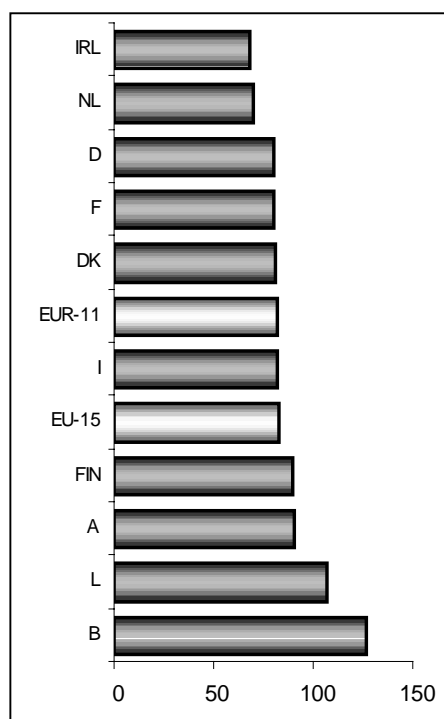


Figure 5: Turnover per person employed (1000 ECU)

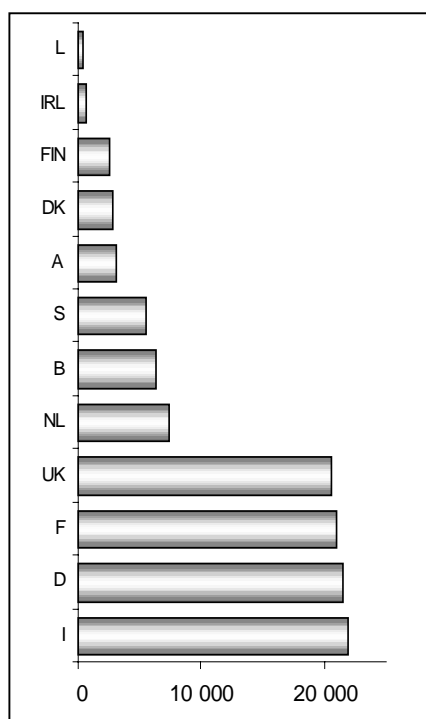


Figure 6: Turnover in 'Freight transport by road' sector (million ECU)

Wealth created by EU road haulage enterprises: 66 billion ECU.
Labour productivity and value added per employed much higher than in the transport sector. Personnel costs 15% lower than in the transport sector as a whole.

Year	Freight transport by road		Transport sector		
	Value added at factor cost [million ECU]	Personnel costs [million ECU]	(Value added at factor cost) / (Personnel costs) (1000 ECU)	Value added at factor cost per person employed (1000 ECU)	Personnel costs per employee (1000 ECU) in 1995
EU-15	66 000	34 000	1.94	39	27
EUR-11	49 000	25 000	1.98	35	26
B 1995	2 438	1 622	1.50	49	37
DK 1993	1 691	721	2.34	48	32
D	:	:	:	:	:
EL	:	:	:	:	:
E 1993	6 600	2 487	2.65	27	22
F 1994	8 445	5 918	1.43	32	25
IRL 1996	234	:	:	25	:
I 1995	7 135	3 200	2.23	27	24
L 1995	153	105	1.46	39	29
NL 1995	4 084	2 842	1.44	38	32
A 1995	1 566	913	1.72	45	29
P	:	:	:	:	16
FIN 1995	1 275	601	2.12	45	28
S 1995	2 087	1 291	1.62	:	31
UK 1996	8 901	5 193	1.71	:	:

Table 4: Value added at factor cost and personnel costs for road-hauling sector
 Note: For Denmark, France and UK the Value added is measured at basic prices.

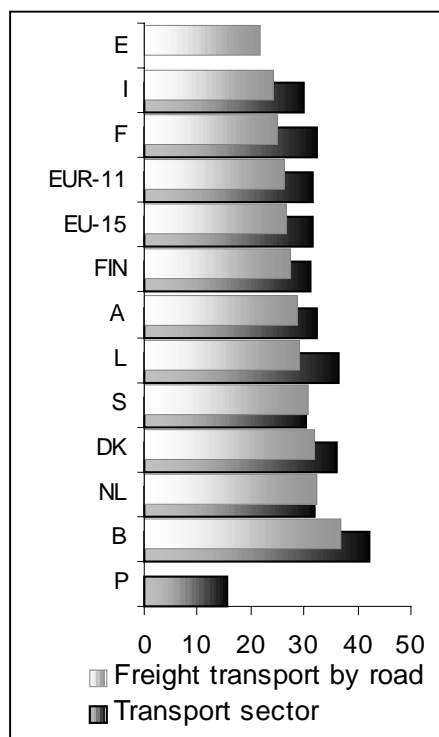


Figure 7: Personnel costs per employee (1000 ECU)

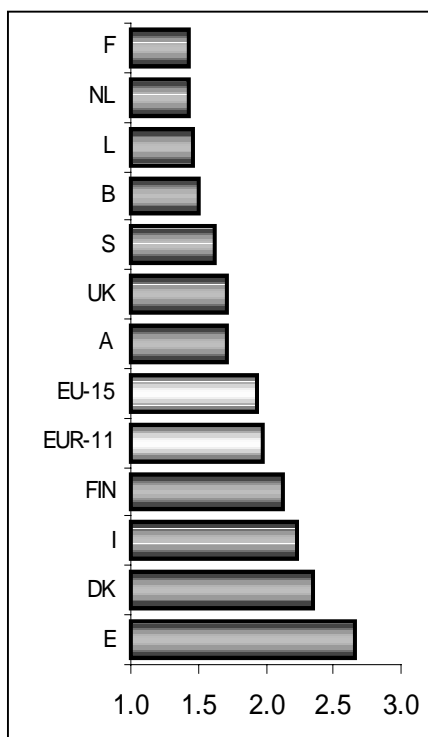


Figure 8: Labour productivity: (Value added at factor cost) / (Personnel costs)

The wealth, measured by the value added at factor cost, created by EU road haulage enterprises amounts to 66 billion ECU. The highest values, where data available, occur in the United Kingdom and France with 8.9 and 8.4 billion ECU respectively.

Where data is available, the personnel costs are the highest in France (5.9 billion ECU) and the United Kingdom (5.2 billion ECU).

One way to measure labour productivity is to divide the value added by the personnel costs. In Spain, this kind of labour productivity is the highest with a factor of 2.65, next is Denmark with 2.34 followed by Italy with 2.23. The labour productivity factor for the EU road haulage sector is 1.94, which is much higher than in the EU transport sector, where the factor is merely 1.31. Among the EU countries, that are able to provide data, France has the 'lowest' labour productivity of 1.44. This value is still higher than the labour productivity for the whole EU transport sector.

Another way of measuring productivity is to measure value added per person employed. At the EU level road haulage sector has a higher productivity than the whole transport sector (39 thousand compared to 35 thousand per employed).

The personnel costs per employee is at the EU level 15% lower for the road haulage sector than in the transport sector. This could be explained by higher skill levels, more restricted markets or monopoly suppliers in other transport sectors, especially in the air and water transport sectors.

There are approximately 440 thousand road haulage enterprises active in the EU, 82% of them within the euro-zone.

There are approximately 440 thousand road haulage enterprises active in the EU, 82% of them within the euro-zone.

The Member State with the highest number of enterprises in the road haulage sector is Spain with 133 thousand followed by Italy with 110 thousand. The other three major countries, UK, France and Germany report that the numbers of enterprises in this sector are below 40 thousand each.

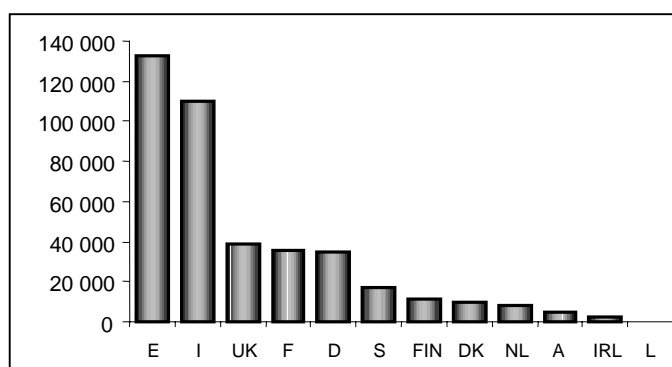


Figure 9: Number of enterprises

Year	Number of enterprises (units)	Share of transport sector
EU-15	440 000	:
EUR-11	360 000	:
B	:	:
DK 1993	9 772	:
D 1996	34 843	:
EL	:	:
E 1993	132 870	:
F 1994	35 374	:
IRL 1996	2 375	59%
I 1995	109 874	72%
L 1995	366	52%
NL 1995	8 042	40%
A 1996	4 785	40%
P	:	:
FIN 1995	11 099	53%
S 1994	17 329	:
UK 1996	39 053	59%

When analysing the structure we estimate that an average 63%* of the EU transport enterprises are in the road haulage business. In other words, there are more road haulage enterprises than in the 'Water transport', 'Air transport' and 'Supporting and auxiliary transport' sectors altogether.

Where data is available, the Member State with the highest share is Italy, with 72% road haulage enterprises in the transport sector. Other countries with a share bigger than the EU average are Ireland, Sweden, Spain, United Kingdom and Denmark. The low share in Austria could be explained by the large number of passenger transport enterprises. In the Netherlands there are particularly many water transport enterprises that can explain the relatively low share.

Table 5: Number of enterprises for road haulage sector

* The figure 63% is calculated for those countries where data for both road hauling and transport enterprises are available for the same year (taking into account IRL, I, L, NL, A, FIN and UK firms, 40% of all EU transport enterprises).

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Freight transport by road

This is a sector in the NACE Rev. 1 – the statistical classification of economic activities. It is at 4-digit level. The hierarchy to get down to this level is as follows: Section I 'Transport', Division 60 'Land transport; transport via pipelines', 60.2 'Other land transport' and finally 60.24 'Freight transport by road'. This class includes: freight transport operation by road, logging haulage, stock haulage, refrigerated haulage, heavy haulage, bulk haulage, including haulage in tanker trucks, haulage of automobiles, furniture removal, renting of trucks with drive, freight transport by man or animal-drawn vehicles. This class excludes operation of terminal facilities for handling freight.

Number of enterprises

A count of the non-dormant number of enterprises registered to the population concerned in the business statistics register. It should be noted that the recommendations on business registers only requires enterprises to be included in the business register for statistical purposes if they employ at least 0.5 persons measured in full-time equivalents per year. This variable refers to all enterprises producing either a market or non-market output. There can be no discrimination on the basis of size. The small enterprises, even those without paid employees, must be taken into account. Since it has a full accounting system, the enterprise is the unit best able to supply all the necessary data for establishing value added and gross operating surplus.

Number of employees

This heading is defined as a count of the number of employees. Employees are defined as all persons who, by agreement, work for another resident institutional unit and receive remuneration.

Estimations

All EU-15 and EUR-11 figures are estimated, by using weighted structures of available data.

Self-employed person

Self-employed persons are defined as persons who are the sole owners, or joint owners, of the unincorporated enterprise in which they work. Self-employed persons are classified here if they are not also paid employment which constitutes their principal activity: in that latter case they are classified under employees.

Number of persons employed

This covers all persons – both employed and self-employed – engaged in some productive activity that falls within the production boundary of the system.

Turnover

Turnover comprises the totals invoiced by the observation unit during the reference period, and this corresponds to market sales of goods or services supplied to third parties. These sales may be included in accounts under the headings "Net turnover" or "Other operating income". The elements accounted for as "Other operating income" which should be considered here as turnover include income from concessions, patents, trademarks and similar values. Turnover includes all duties and taxes on goods and services invoiced by the unit with the exception of VAT invoiced by the unit vis-à-vis its customer and other taxes directly linked to turnover. It also includes all other charges (transport, packaging, etc.) passed on to the customer, even if these charges are listed separately in the invoice.

Value added at basic prices

Value added at basic prices is calculated as follows: Turnover - Purchases of goods and services +/- Change in stocks of goods and services + Capitalised production + Operating subsidies linked to products.

Value added at factor cost

Value added at factor cost is calculated as follows: Value added at basic prices + Operating subsidies linked to production - Duties and taxes linked to production (other than VAT and other taxes directly linked to turnover) linked to production.

Personnel costs

Personnel costs are defined as the total remuneration, in cash or in kind, payable by an employer to an employee (regular and temporary employees as well as home workers) in return for work done by the latter during the reference period. Personnel costs also include taxes and employees' social security contributions retained by the unit as well as the employer's compulsory and voluntary social contributions.

Personnel costs can be calculated as follows:
Wages and salaries + Social security costs

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