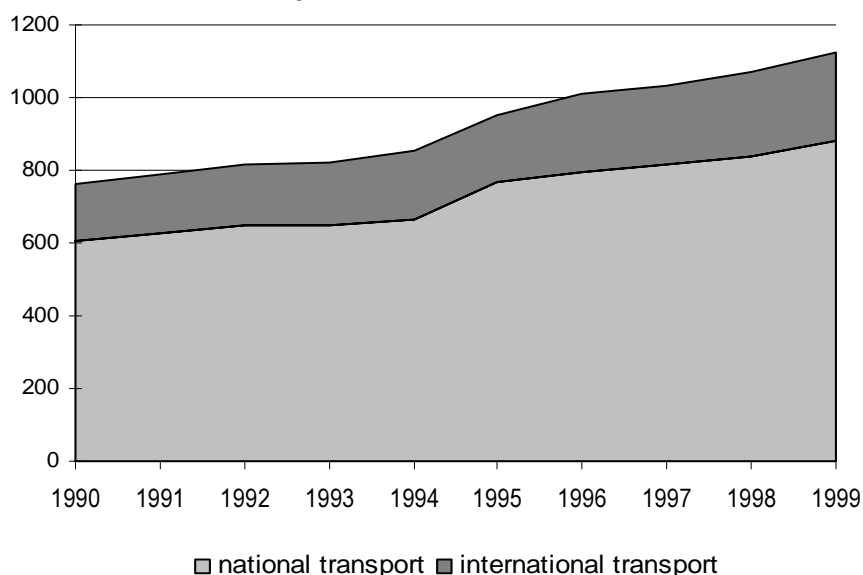


Trends in road freight transport 1990-1999

Cross-trade and cabotage transport increasingly important for small countries

Josefine Oberhausen

Figure 1: Trend of the contribution of national and international road transport 1990-1999¹ - in 1000 million tkm



¹ Data for 10 Member States (B, DK, D, EL, E, F, I, NL, P, UK), see also 'Methodological Notes'.
Source: Eurostat (New Cronos)

Main trends

The total volume of road freight transport in the EU in 1999 can be established at 1 258 000 million tonne-kilometres. National transport accounts for 76 % of this total, international transport for 21 %. Cross-trade transport contributes 2.4 % and finally cabotage transport 0.5 %.

Considering the tonne-kilometres performed by hauliers in national transport, Greece shows a considerable growth in volumes (60 % between 1990 and 1999, annual average growth rate 5.4 %). Other countries with a notable increase are the Netherlands (annual average growth rate of 3.9 %) and Spain, Ireland and Portugal (all 3.8%).

In Spain, international transport increased with an average annual growth rate of 12.4 % between 1990 and 1999. Denmark and Portugal display a doubling of the volume in international transport.

Due to relatively small national markets and the vicinity of foreign markets, Benelux hauliers remain very active in both cross-trade and cabotage transport throughout the period observed. Only recently, German hauliers emerged as important 'caboteurs'.

'Own account' national transport is in steady decrease in all countries, but still accounted for 50 % in Portugal, and just over 30 % in Germany. In most Member States, nearly the entire international transport has been performed for 'hire or reward'.

The breakdown by type of goods carried shows no major shifts in share over time; minerals and building materials clearly dominate the national transport in terms of tonnes hauled, but these goods are forwarded over relatively short distances.

Statistics in focus

TRANSPORT

THEME 7 – 2/2002

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National transport

In 1999, the total volume of national road transport at EU level could be estimated at roughly 957 000 million tkm; this is three and a half times the volume of international road transport (approximately 265 000 million tkm). This relation is also illustrated in Figure 1 on the previous page.

Obviously, geographically big Member States have important national markets and display the highest figures. Germany, France, Italy and the United Kingdom taken together account for 73 % of the cumulated national transport in the EU.

Table 1 displays the time series for the individual countries: it appears that most countries show a steady increase throughout the period observed.

Due to methodological changes (see methodological notes), the figures for Germany are not complete. Influenced by the re-unification process, the volume of the national German market increased by 13 % between 1995 and 1999 alone.

In 1999, close to one quarter (23.7 %) of all the goods forwarded in national traffic in the various EU Member States go to the account of Germany.

Table 1: National transport - in million tkm

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	change 1990-99 (%)
EU-15	:	:	:	:	:	:	:	:	:	956 874	:
Belgium	12 616	13 499	13 887	14 808	17 629	18 616	16 615	18 426	16 693	13 166 ¹	4
Denmark	9 354	9 027	9 407	8 779	9 531	9 327	9 432	9 712	10 108	10 421	11
Germany	:	:	:	:	:	201 299	199 195	203 119	210 402	226 892	:
Greece	12 485	11 929	9 755	13 952	15 109	12 357	15 056	16 394	19 322	20 000	60
Spain	69 924	74 661	75 226	75 517	77 174	78 744	76 257	80 634	91 329	98 147	40
France	118 200	120 900	122 400	118 800	124 600	135 300	136 502	138 960	145 459	159 026	35
Ireland	3 878	4 205	4 707	4 160	:	:	:	:	:	5 432	40
Italy	115 786	116 283	122 283	115 974	:	150 301	151 025	153 600	:	155 000	34
Luxembourg	:	:	453	484	519	531	392	:	:	400	:
Netherlands	22 581	23 037	25 271	25 658	25 458	26 683	27 303	27 384	28 240	31 970	42
Austria	:	:	:	:	:	11 069	11 444	11 559	11 715	12 282	:
Portugal	10 978	11 788	10 652	9 941	11 171	11 119	13 994	14 443	14 693	15 324	40
Finland	:	:	:	:	:	21 804	22 185	23 508	25 611	25 576	:
Sweden	:	:	:	:	:	28 357	30 288	32 176	30 369	30 424	:
United Kingdom	132 968	127 205	123 565	131 453	140 646	146 714	150 195	152 502	155 431	152 814	15

¹ Figure refers to 2000.

Estimates in italic

Source: Eurostat (New Cronos) and Eurostat estimates.

Greece (average annual growth rate: 5.4 %) experienced an increase of 60 % during the period observed, followed by the Netherlands (average annual growth rate: 3.9 %), where the number of tonne-kilometres hauled increased by over 40 %. Conversely, national transport in Belgium (in 2000) is about at the same level as it was ten years earlier.

With nearly 227 000 million tkm forwarded in 1999, the volume of national traffic of Germany is almost 5 times as important as international traffic.

National transport is more than 14 times higher than international transport in Greece and about 10 times in Sweden and the United Kingdom. On the opposite, the volume of national transport in Luxembourg represents less than a third (27 %) of that of international transport.

It should be noted that total transport on the territory of a Member State is slightly higher than indicated in Table 1 since cabotage transport figures ("national" transport by a haulier based in another country – see special section in this report) should be added to the individual country totals.

International transport

Total international road freight transport sums up to approximately 265 000 million tkm in 1999.

Germany, France and the Netherlands alone account for nearly half (48.6 %) of this transport. If the latter country is grouped with its two Benelux partners it appears that the very active hauliers from these three, relatively small Member States account for nearly one quarter (21.5 %) of the EU total. The traditionally high share of Dutch hauliers is often referred to as the 'Rotterdam-effect'.

With an average annual increase of 3.2 % between 1990 and 1999, Dutch international transport is not growing very fast. At a lower level in terms of absolute transport performance, other countries display a more dynamic market: between 1990 and

1999, Spain's international road transport increased by 186 % (average annual growth rate: 12.4 %), that of Denmark more than doubled (average annual growth rate 10.1 %). Portugal (average annual growth 8.8 %) displays also high growth rates.

Belgium's international transport shows an important drop: this might however also be caused by a change in the data collection methodology between 1998 and 1999. The figures for Italy display a relatively important fluctuation after 1994.

The only country that registered a decline is Greece, where international road transport seems to recover only slowly from the Yugoslav conflict.

Table 2: International transport - loaded and unloaded - in million tkm

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	change 1990-99 (%)
EU-15	:	:	:	:	:	:	:	:	:	264 511	:
Belgium	19 433	20 604	18 210	20 178	23 073	22 833	21 084	21 920	19 900	14 470 ¹	-25
Denmark	5 145	5 872	6 384	10 423	11 433	12 421	11 344	11 226	10 796	12 277	139
Germany	:	:	:	:	:	33 664	33 887	38 751	42 173	45 691	:
Greece	2 119	1 983	2 732	1 415	636	867	841	1 734	1 272	1 400	-34
Spain	12 271	13 086	14 187	16 277	20 171	22 513	25 250	28 348	32 814	35 046	186
France	34 064	34 381	37 070	34 911	38 360	40 041	40 333	39 439	40 291	41 973	23
Ireland	1 008	780	411	887	:	:	:	:	:	1 106	10
Italy	20 498	18 423	19 661	18 179	19 309	12 497	23 940	19 754	:	21 000	2
Luxembourg	:	:	1 661	1 615	1 395	:	:	1 213	:	1 473	:
Netherlands	30 896	29 033	30 468	31 232	32 719	33 901	35 147	35 999	36 809	41 012	33
Austria	:	:	:	:	:	12 474	13 103	13 613	14 610	15 654	:
Portugal	5 152	6 901	6 140	5 764	6 739	:	8 846	10 046	9 954	11 036	114
Finland	:	:	:	:	:	:	2 570	2 122	2 413	3 716	:
Sweden	:	:	:	:	:	3 057	2 827	2 662	2 916	2 617	:
United Kingdom	10 651	11 229	11 755	12 479	14 370	14 415	15 523	16 263	16 122	16 040	51

¹ Figure refers to 2000.

Estimates in italic

Source: Eurostat (New Cronos) and Eurostat estimates.

As mentioned in the previous chapter, international road transport can be of considerable importance for geographically small countries. Expressed in tonne-kilometres forwarded, international transport clearly outnumbers national transport in Belgium, the Netherlands and especially Luxembourg (nearly by factor 4).

Apart from 'regular' international transport, cross-trade transport figures (international transport performed by a haulier from a third country) should be added to the account of the hauliers of the various Member States. This shows then the total amount of tonne-kilometres forwarded in international traffic.

Cross-trade transport

Cross-trade road transport can be of major importance for certain countries. From the data available, it appears that – as for cabotage transport (see next section) - especially smaller Member States with a geographically central location have a high proportion of cross-trade transport, not only in

absolute numbers but also when compared to 'regular' international transport: this is notably the case for Belgium and the Netherlands, where cross-trade transport in 1999 represented around 20% of the volume of total 'regular' international transport (based on tkm).

Table 3: Cross-trade transport performed in EU-15 by hauliers from reporting countries - in million tkm

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
EU-15	:	:	:	:	:	:	:	:	:	30 307e
Belgium	2 298	1 975	3 129	3 166	3 822	3 799	3 746	2 933	3 848	2 588 ¹
Denmark	:	:	:	659	603	499	432	478	390	436
Germany	:	:	:	:	:	2 762	2 656	3 293	3 855	4 355
Greece	4	7	:	:	:	:	:	:	:	0e
Spain	:	:	:	218	220	373	454	495	703	795
France	2 174	2 570	2 990	3 144	2 957	2 694	2 911	2 795	2 811	2 958
Ireland	184	112	:	:	:	:	:	:	:	229
Italy	:	:	149	143	153	186	237	:	:	350e
Luxembourg	:	1 255	1 854	2 058	1 979	:	1 767	2 594	:	3 444
Netherlands	4 396	4 921	5 058	4 955	5 355	5 972	6 269	6 493	7 014	8 171
Austria	:	:	:	:	:	2 981	3 347	4 059	4 753	5 825
Portugal	133	247	219	326	440	468	361	332	352	708
Finland	:	:	:	:	:	:	153	21	64	102
Sweden	:	:	:	:	:	64	50	70	26	54
United Kingdom	361	541	269	216	277	291	401	392	403	292

¹ Figure refers to 2000.

Source: Eurostat (New Cronos), Eurostat/UN-ECE/ECMT (Common Quest. - marked in italic) and Eurostat estimates (marked with "e").

Largely due to the limited size of its home markets, Luxembourg's cross-trade transport is even more than twice as important as 'regular' international transport. For all other Member States, and especially peripheral EU Member States, this type of transport is of lesser importance: equivalent to around 10 % of the total international transport for

Germany, this figure falls to 7% for France and less than 4% for most other Member States.

Table 3 outlines however that throughout the period observed, a general upward trend can be noticed for most countries, even though fluctuations occurred at Member State level.

Cabotage transport

Cabotage is road transport inside a country by a haulier based in another country. Cabotage transport was gradually introduced in 1990 (authorization quotas) and entirely liberalized in 1998. The cabotage regime was extended to the EFTA states (except Switzerland) following the creation of the EEA.

Although Table 4 shows a considerable increase of

cabotage transport over the years, the overall influence remains small: national transport by resident hauliers is 140 times more important than cabotage.

Countries where the most cabotage transport occurred in 1997 were Germany (68% of the entire cabotage performed) and France (13%).

Table 4: Total cabotage by hauliers from EU countries ¹ - in million tkm

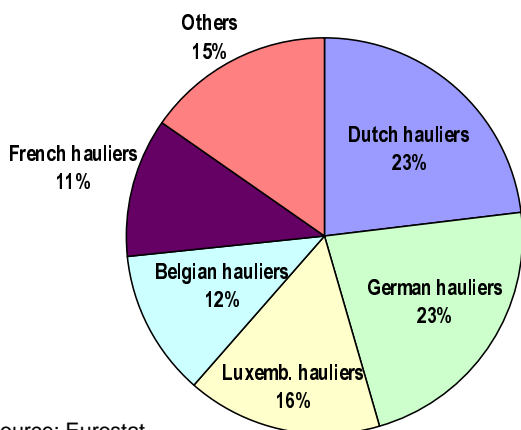
1991	1992	1993	1994	1995	1996	1997	1998	1999
646	745	881	1 144	1 672	2 204	3 538	4 816	6 764

¹ The figure for 1994 includes cabotage performed by hauliers from Sweden and Finland, which joined the EU only on 1.1.1995. Austria joined the cabotage regime in 1997.

Source: DG TREN (figures up to and including 1998); Eurostat (1999)

Estimates in italic.

**Figure 2: The most active 'caboteurs', 1999
(based on tkm performed)**



Source: Eurostat

Hauliers from geographically small countries have more incentive to undertake cabotage because their national markets are small and other national markets geographically close. Hauliers from the three Benelux countries have been particularly active in the market: together they were responsible for more than

Table 5 : Cabotage transport 1999 – in million tkm

Country	Value (million tkm)
EU-15	6 764.2
Belgium ¹	811.0
Denmark	101.5
Germany	1 532.7
Greece	0.0
Spain	271.8
France	757.0
Ireland	249.1
Italy	3.0
Luxembourg	1 065.0
Netherlands	1 557.5
Austria	222.0
Portugal	100.6
Finland	33.0
Sweden	19.0
United Kingdom	41.0

¹ The figure refers to 2000.

Source: Eurostat

Estimates in italic

half (51%) of the entire cabotage transport performed in the EU in 1999.

Fears for 'unfair competition' from low labour cost countries remain unfounded: less than 6% of the entire cabotage was carried out by Greece, Spain and Portugal.

Breakdown of national transport by type of transport

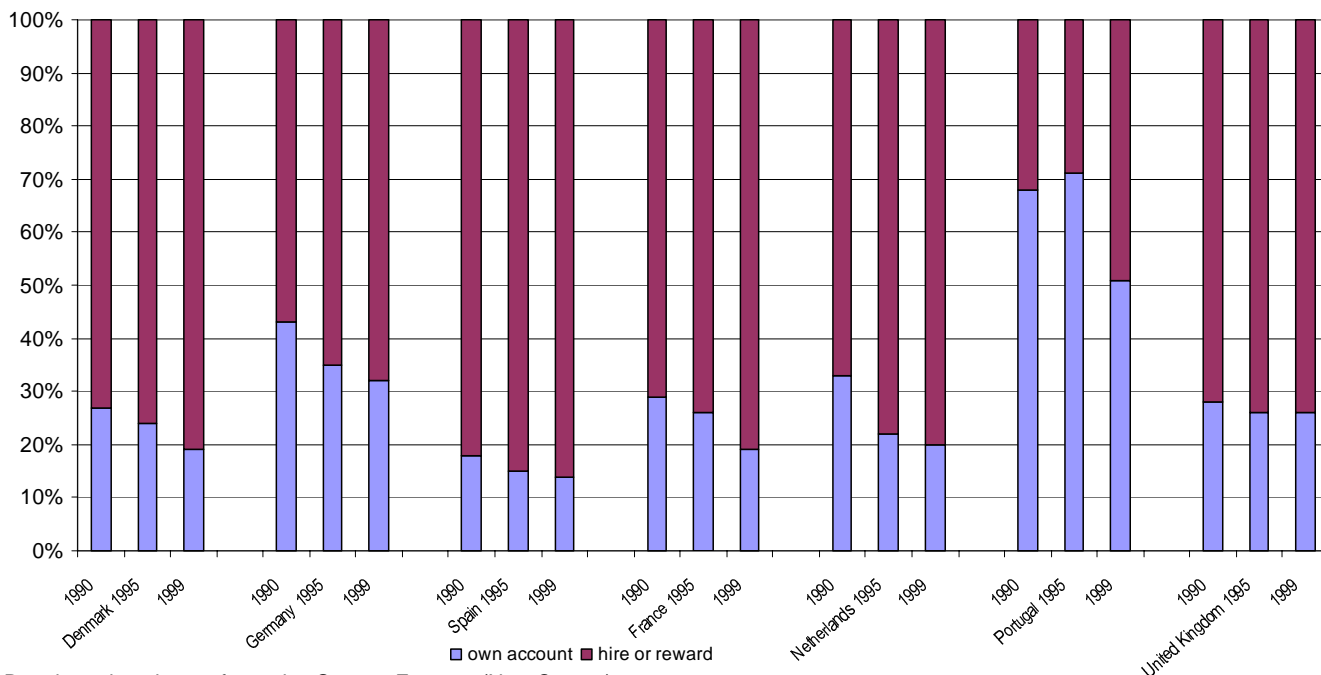
If national transport is observed by type of transport, it appears that 'own account' transport is steadily decreasing. In all Member States for which data were available, this trend can be observed. More and more companies seem to concentrate on their core business and 'outsource' their ancillary transport activities.

Influenced by different economic and industrial structures, the situation differs however from country to country. Figure 3 shows that among the 7

countries observed, Portugal shows a very high 'own account' share in 1990 and 1995 with around 70%. In 1999, this share fell to just over 50%. Apart from Germany, all other countries now have an 'own account' share of well below 30%, the lowest share being registered for Spain (14%).

The gradual shift towards more hire or reward transport appears to be slowest in the United Kingdom, where the 'own account' share was only slightly reduced (from 28% in 1990 to 26% in 1999).

Figure 3 : National transport ¹, share by type - in %



¹ Data based on tkm performed. Source: Eurostat (New Cronos).

Although not represented in Figure 3 on the previous page, it is noticeable that in 1999, Luxembourg had an 'own account' share of 80% (321 million tkm). This can partly be explained by the limited size of the country and its economic structure (presence on the national territory of various important industrial

production sites belonging to the same company).

Nearly the entire international road transport consists of 'hire or reward' transport. 'Own account' international transport is sometimes so negligible that certain countries not even collect these data.

Breakdown of national transport by goods groups (NST/R chapters)

Looking at Figure 4, it appears that in national transport there have been no major changes in the percentual shares of the various goods groups between 1990 and 1999 (on the basis of data availability, figures for seven countries, representing 73 % of the national transport in the EU Member States in 1999, were compiled).

On the basis of tonnes forwarded, 'crude and manufactured minerals and building materials' (chapter 6) represent, with over 45% share, by far the most important group of goods. 'Machinery, transport equipment, manufactured articles and miscellaneous articles' (chapter 9) follow by a substantial margin (share: around 17 %).

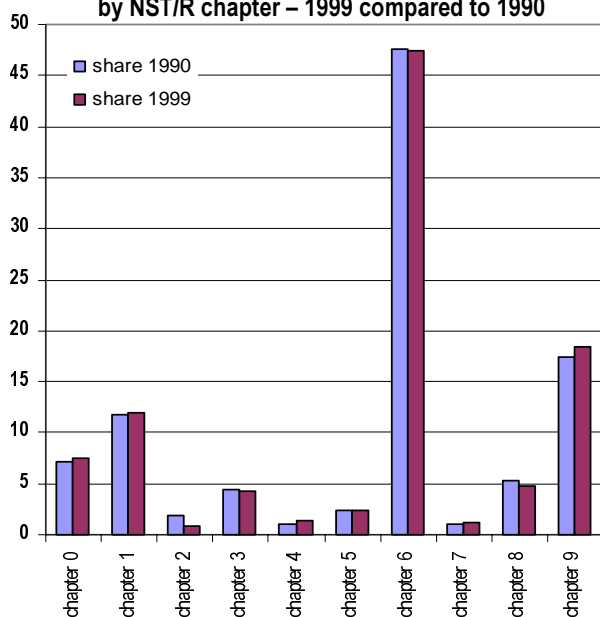
Member States declare national transport by group of goods both on the basis of tonnes forwarded and tonne-kilometres performed. Figure 5 outlines these two elements for 1999 and allows some indications on the structure of transport flows.

The share of chapter 6 reaches 47 % when expressed in tonnes, yet only 21 % when expressed in tonne-kilometres. Hence minerals and building materials remain - weightwise - the dominant type of goods, those goods are however carried over a relatively short distance. The opposite, albeit at a lesser degree, can be said for chapter 9 and chapter 1: here, quantities are carried over much longer distances.

When looking both at Figure 4 and Figure 5, it should be kept in mind that NST/R goods group 24 - "miscellaneous articles" -, one of the five goods groups that constitute NST/R chapter 9, has a substantial 'weight' within chapter 9 in 1999. Over the years, it has been experienced that goods in containers, for which the content is not exactly known by reporting authorities, are increasingly allocated to "miscellaneous articles". Expressed in tonnes, goods group 24 alone was responsible for 55 % of the volume of chapter 9; expressed in tonne-kilometres, the equivalent figure was 48 %.

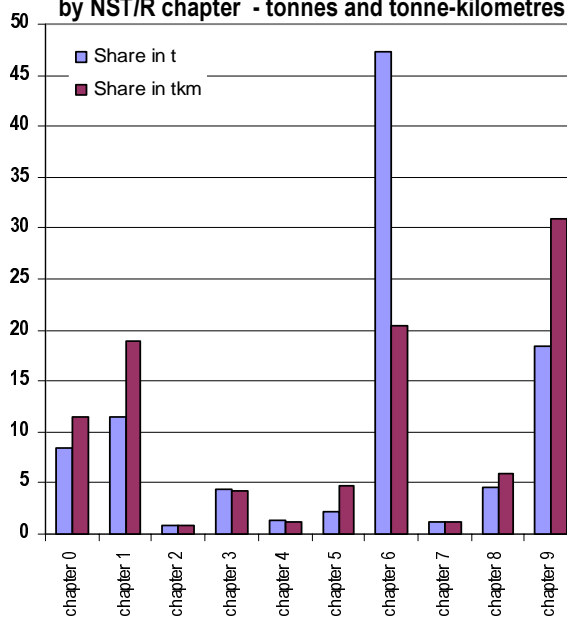
NST/R chapters	
0	Agricultural products and live animals
1	Foodstuffs and animal fodder
2	Solid mineral fuels
3	Petroleum products
4	Ores and metal waste
5	Metal products
6	Crude and manufact. minerals, building mat.
7	Fertilizers
8	Chemicals
9	Machinery, transport equipm., manufactured articles and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

Figure 4: Share (%) of goods groups in national transport by NST/R chapter - 1999 compared to 1990



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

Figure 5: Share (%) of goods groups in national transport 1999 by NST/R chapter - tonnes and tonne-kilometres



Note: National goods transport in all Member States except Belgium, Greece and Italy have been taken into account.

➤ 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, except for data on cabotage transport. Cabotage data have been collected on the base of Council Regulation (EEC) N° 3118/93 'laying down the conditions under which non-resident carriers may operate national road haulage services within a Member State'.

Data relating to all types of road transport for 1999 have been obtained from so-called Supplementary Tables supplied by Member States to Eurostat on a voluntary base in the frame of the implementation of Council Regulation (EC) 1172/98 on statistical returns in respect of the carriage of goods by road.

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.

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.

Belgium

Supplementary tables for 1999 were not available at the date of publication. Several figures for Belgium in this publication refer to 2000 and are based on micro data.

United Kingdom

National transport includes domestic legs of international journeys.

International transport

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: 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 the table 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; data presented in the table are those available to date. Two sources have been used: Council Directive 78/546 data and figures from the 'Common Questionnaire' (joint questionnaire from Eurostat, UN-ECE and ECMT).

Cabotage

Apart from the 'traditional' national transport, cabotage (transport taking place on the territory of a country but performed by hauliers registered in another country) can also be considered as national transport from the point of view of the movement of goods. 'Traditional' national transport is based on the transport performance declared by Member States for their own territory and hauliers registered in their country. Cabotage is declared by Member States for hauliers registered in their country who performed transport on the territory of another country. Thus, from the point of view of the reporting country, cabotage is considered as international transport. This concept applies to data collected under Council Regulation (EC) 1172/98.

Cabotage data have been taken from the Cabotage database of DG TREN for data up to 1998, as reporting on cabotage transport was not covered by Council Directive 78/546/EEC. Reporting on cabotage transport is however covered by Council Regulation (EC) 1172/98.

Table 4 on cabotage takes into account cabotage carried out by hauliers in EU countries up until 1998. Figures from 1996 to 1998 were adjusted to take into account increasing underreporting.

Breakdown by type of transport

The information presented takes into account the Member States that have supplied equivalent datasets for 1990, 1995 and 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.europa.eu.int/eurostat/ramon).

This publication was prepared with the assistance of Jelle Bosch, Artemis Information Management.

Further information:

➤ Databases

New Cronos, Theme 7
 Domaine Road transport

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