

Flows in international road freight transport - 2005

Statistics in focus

TRANSPORT

83/2007

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Manuscript completed on: 19.06.2007
Data extracted on: 02.04.2007
ISSN 1977-0316
Catalogue number: KS-SF-07-083-EN-N
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Highlights

In 2005, European road transport was dominated in tonnage terms by the five major economies Germany, Spain, France, the UK and Italy, countries where international transport is relatively minor compared with national transport. For these five, international movements account for more than 10% of the total only in Germany.

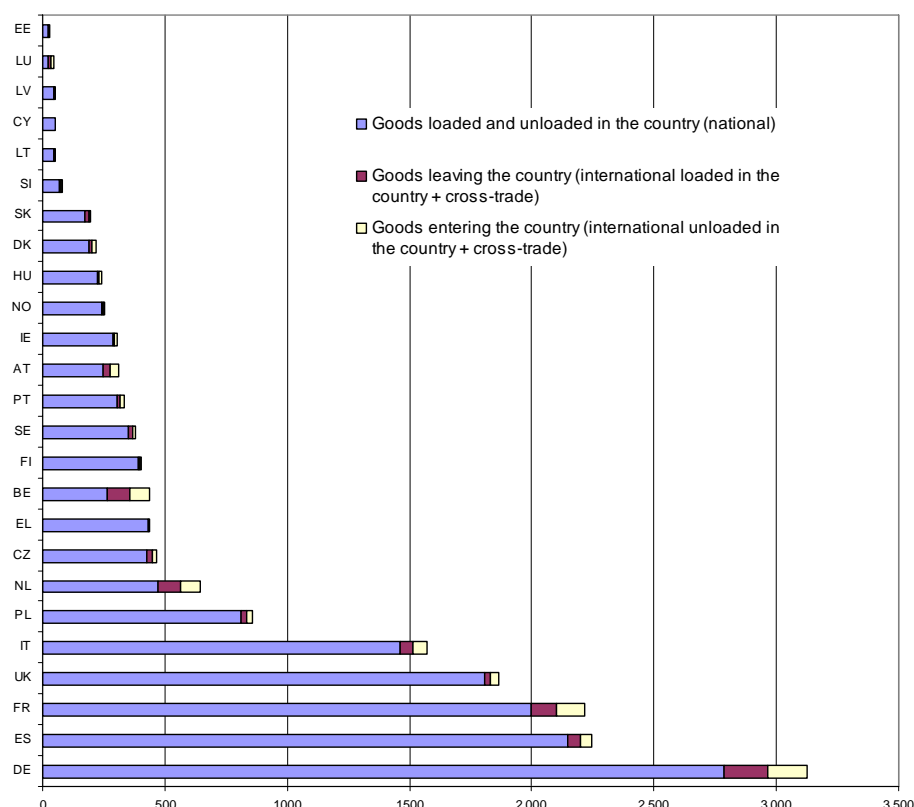
For a number of mid-sized Member States, such as the Netherlands, Austria and especially Belgium, international transport was substantially more significant. With the exception of Cyprus, this was also true though to a lesser extent for the smaller economies, such as Estonia, Latvia, Lithuania and Slovenia. Luxembourg was a case apart with nearly half its movements international.

93% of international movements were intra-EU. Germany was the largest force in both intra- and extra-EU international transport. For intra-EU transport, France, the Netherlands and Belgium also had significant shares. For extra-EU transport, Sweden and Italy came to the fore as the other main players. Poland and Finland have grown in importance in this area.

A number of the New Member States recorded the highest growth rates in international traffic, including the Baltic States, Hungary, Poland, Slovenia and Slovakia. The growth rates in Latvia and Lithuania were over 35%, comparing 2005 with 2004. In contrast, the larger economies recorded small declines in their international movements, with the exception of Italy which showed a 2.6% rise.

Polish national carriers accounted for 80% of that country's international transport movements, a marked contrast with French hauliers, who contributed less than a third of the total. The largest country to country flows in intra-EU transport were those between Germany and the Netherlands.

Graph 1: Goods moved on the countries' territory (national; international transport loaded, unloaded and cross-trade), 2005* - million tonnes



* No road freight transport data have been reported by Malta in 2004 and 2005.

International road freight transport by country and nationality of haulier

Table 1: Goods leaving or entering a country (international transport loaded or unloaded and cross-trade), 2004 and 2005 - million tonnes

	Goods leaving the country		Goods entering the country		Total		% change 2004-2005
	2004	2005	2004	2005	2004	2005	
BE	88.6	88.5	78.4	78.2	167.0	166.7	-0.2
CZ	24.0	24.1	20.2	19.9	44.2	44.0	-0.6
DK	13.6	14.0	14.9	16.5	28.6	30.5	6.8
DE	184.1	183.1	163.2	161.2	347.3	344.3	-0.9
EE	2.1	2.3	1.7	2.2	3.9	4.5	16.3
IE	7.7	6.9	13.4	11.9	21.1	18.8	-11.1
EL	2.3	1.9	2.6	2.3	4.9	4.2	-14.0
ES	49.6	48.6	48.6	49.1	98.3	97.6	-0.7
FR	105.1	104.7	113.4	113.5	218.5	218.2	-0.1
IT	53.6	55.7	54.6	55.4	108.2	111.1	2.6
CY	0.0	0.0	0.0	0.0	0.0	0.0	-13.0
LV	2.5	3.3	2.2	3.1	4.6	6.3	36.8
LT	3.3	4.5	3.0	4.1	6.3	8.6	36.5
LU	9.1	9.0	11.2	11.3	20.3	20.3	0.3
HU	9.1	11.0	9.2	10.9	18.3	21.9	19.6
NL	90.1	89.9	83.6	81.3	173.6	171.2	-1.4
AT	30.4	29.5	34.4	34.7	64.8	64.1	-1.1
PL	23.5	25.6	21.4	24.1	44.9	49.7	10.7
PT	12.9	12.8	14.6	15.3	27.5	28.1	2.3
SI	4.8	6.1	5.7	6.3	10.5	12.4	17.8
SK	9.4	13.0	8.5	10.3	17.9	23.3	29.7
FI	4.8	4.2	4.5	5.0	9.3	9.2	-1.1
SE	13.3	13.3	13.3	12.6	26.6	25.8	-2.9
UK	29.0	27.7	32.6	32.8	61.6	60.5	-1.8
LI	:	0.2	:	0.2	:	0.5	:
NO	4.5	4.3	6.3	6.3	10.8	10.5	-2.3

In terms of tonnage, Table 1 shows that in 2004 and 2005, Germany was by far the major source and destination for international road freight movements, followed by France. Two mid-sized countries, the Netherlands and Belgium, straddling the access to major European ports, came next with Italy and Spain a little further behind. Among the major economies, the UK was less important in this context, reflecting its status as an island and the impact this has on road transport. However, all these countries, with the exception of Italy, saw their international road freight movements decline. A number of the new Member States, including the Baltic States, Hungary, Poland, Slovenia and Slovakia recorded very high growth rates, comparing 2005 with 2004. In the case of Latvia and Lithuania, this reached over 35% though from very low levels.

Table 2 shows how much of each countries' international movements were handled by national hauliers and how much by hauliers from other Member States for the year 2005. 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 between a third and a quarter 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 and Slovenia, with more than 80% of their international tonnage being handled by their own hauliers. The only exception was Hungary, with Hungarian carriers taking around a 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 a quarter or less of Swedish international tonnage.

The figures continue to suggest that the new Member States to the East are still operating in parallel with the EU-15 in the West. Except for the Czech Republic, Hungary and Slovenia, more of new Member States' markets are being taken by hauliers from other new Member States rather than from the EU-15 members, varying from between one fifth and two fifths for each country's international tonnage. One exception is Slovenia where EU-15 hauliers take a larger share of its market than those from other new Member States.

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

In terms of exchanges between the two blocs, the EU-15 countries recording the highest levels of new Member State penetration are Germany, Austria, Finland and Sweden, all with more than 10% of their international tonnage taken by new Member State carriers. In contrast, Belgium, Ireland, France,

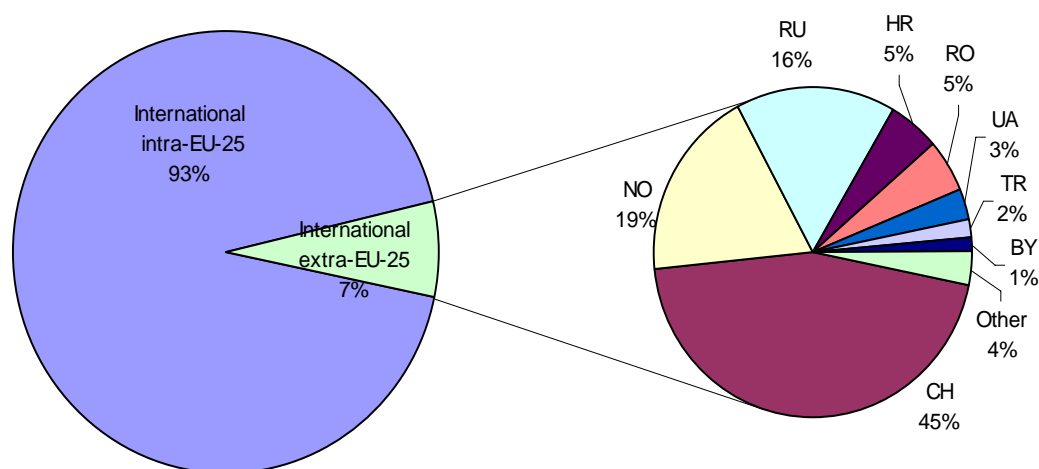
Luxembourg, the Netherlands and Portugal recorded figures less than 5%. Among the new Member States, the countries more open to EU-15 penetration are Slovenia, Hungary and the Czech Republic with 10% or more of their international tonnage being transported by hauliers from the EU-15.

Table 2: Goods leaving or entering a country (international transport loaded or unloaded and cross-trade), by nationality of hauliers, 2005 - million tonnes

	Goods leaving the country				Goods entering the country			
	Total (million tonnes)	Share in %			Total (million tonnes)	Share in %		
		National hauliers	Other EU-15 hauliers	Other new MS hauliers		National hauliers	Other EU-15 hauliers	Other new MS hauliers
BE	88.5	40	57	3	78.2	32	65	2
CZ	24.1	73	12	14	19.9	71	11	18
DK	14.0	58	36	5	16.5	46	46	6
DE	183.1	44	44	11	161.2	36	50	14
EE	2.3	76	3	20	2.2	61	8	30
IE	6.9	56	44	1	11.9	39	60	1
EL	1.9	68	24	7	2.3	61	33	5
ES	48.6	58	38	3	49.1	58	39	3
FR	104.7	29	67	3	113.5	25	71	3
IT	55.7	41	48	9	55.4	37	51	11
CY	0.0	78	0	0	0.0	100	0	0
LV	3.3	62	11	25	3.1	56	9	34
LT	4.5	74	1	23	4.1	64	8	27
LU	9.0	55	43	2	11.3	52	47	1
HU	11.0	52	18	28	10.9	45	22	32
NL	89.9	68	29	3	81.3	61	36	3
AT	29.5	53	33	13	34.7	46	41	13
PL	25.6	83	6	9	24.1	81	9	9
PT	12.8	75	24	0	15.3	68	31	1
SI	6.1	80	12	7	6.3	80	13	7
SK	13.0	68	7	23	10.3	64	9	27
FI	4.2	72	12	13	5.0	81	8	10
SE	13.3	25	51	12	12.6	17	61	11
UK	27.7	46	50	4	32.8	32	62	5
LI	0.2	64	34	1	0.2	45	54	1
NO	4.3	44	49	6	6.3	32	62	6

Structure of international road freight transport in EU Member States

Graph 2: International transport performed by EU-25 hauliers, by partner country, 2005 - % in tonnes



In 2005, 93% of international road freight transport movements were intra-EU. Of the remaining 7%, the major partners were Switzerland (45%), Norway (19%) and Russia (16%), the three major economies adjoining

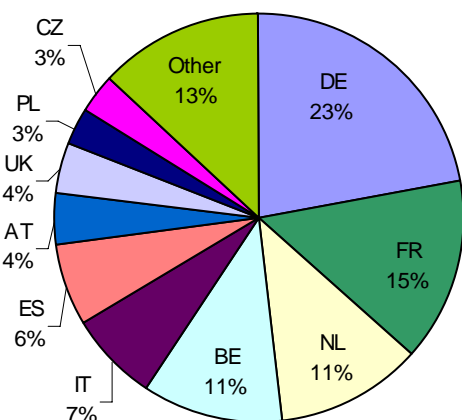
the EU. However, tonnages loaded and unloaded by extra-EU-25 hauliers that may be significant are not covered in these figures. In 2005, German hauliers, with nearly a quarter of the total, dominated both intra- and

extra-EU international transport in tonnage terms. In intra-EU transport, the other major players were hauliers from France, the Netherlands and Belgium. Among the new Member States, both Poland and the Czech Republic 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, Italy, supplying Switzerland and San Marino, and France were also significant contributors. Poland and Finland, both countries on the periphery, also made substantial contributions.

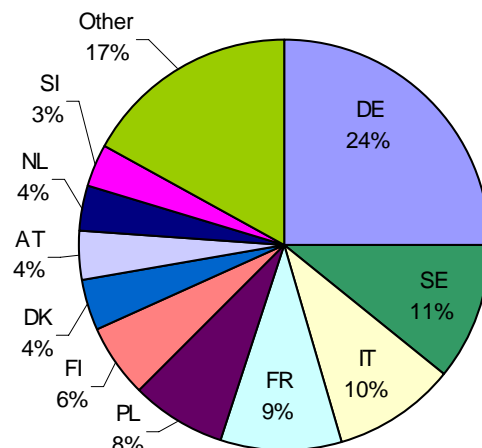
Graph 3: Share of international transport for each country (international transport loaded, unloaded and cross-trade) in the total volume of goods carried in international intra-EU-25 transport, 2005 - % in tonnes

Total intra-EU-25 transport: 741 million tonnes



Graph 4: Share of international transport for each country (international transport loaded, unloaded and cross-trade) in the total volume of goods carried in international extra-EU-25 transport, 2005 - % in tonnes

Total extra-EU-25 transport: 55 million tonnes



At country to country level, the largest flow for extra-EU transport reported by the EU-25 Member States was in 2005 between Germany and Switzerland which at 11.4 million tonnes accounted for over 20% of the total. Indeed, Switzerland, a major economy entirely surrounded by the EU appeared in 5 of the top twelve country to country flows with France, Italy, the Netherlands and Austria as its other partners. The flows between Sweden and Norway at 5.7 million tonnes or just over 10% of the total was in second place. Norway's movements to Denmark also appeared in the top twelve. Russia appeared twice in the list with Finland and Poland, near neighbours, as partners, these two flows accounting for 7% of the total. Two more intriguing flows were those between San Marino and Italy and between Spain and Andorra, the two together accounting for a little under 5% of the total. In twelfth place was the movement between Slovenia and Croatia.

Table 3: Main country-to-country flows in extra-EU-25 road goods transport, 2005 - million tonnes

Rank	Pair of countries	Total Tonnes	% in total extra-EU-25 tonnes
1	DE CH	11.4	20.8
2	SE NO	5.7	10.4
3	FR CH	4.3	7.8
4	IT CH	4.0	7.3
5	FI RU	2.5	4.5
6	DK NO	1.9	3.4
7	PL RU	1.4	2.5
8	IT SM	1.4	2.5
9	ES AD	1.3	2.3
10	NL CH	1.3	2.3
11	AT CH	1.2	2.2
12	SI HR	1.2	2.1

Country to country flows

Table 4: Country-to-country flows in intra-EU-25 road goods transport, 2005 - 1000 tonnes

Country of unloading	Country of loading																							
	BE	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT	LU	HU	NL	AT	PL	PT	SI	SK	FI	SE	UK
BE		390	248	19 980	19	39	13	1 175	23 141	1 745	0	54	109	1 928	181	24 786	529	743	201	53	208	29	192	1 978
CZ	634		119	7 265	19	33	73	370	793	811	-	12	77	21	676	689	1 259	2 485	30	194	3 154	33	385	253
DK	572	233		7 300	18	35	6	239	818	694	-	50	69	67	46	1 240	175	509	25	42	70	137	3 115	91
DE	18 488	9 920	5 831		198	123	511	6 214	22 616	14 435	0	327	598	3 060	1 893	38 111	12 363	9 166	636	874	1 852	142	1 556	2 751
EE	47	46	11	130		-	-	21	17	44	-	643	225	-	29	64	15	176	-	-	-	264	151	-
IE	58	45	35	193	5		-	79	223	90	-	-	2	-	7	158	-	28	11	0	1	-	5	10 934
EL	54	45	20	522	-	-		58	192	796	6	-	1	11	32	156	110	56	3	-	23	-	-	114
ES	1 912	366	258	6 206	27	53	22		19 565	4 799	-	92	53	128	211	2 073	314	364	9 219	112	155	44	150	1 600
FR	31 521	826	768	25 359	25	232	122	16 758		12 940	0	98	150	2 529	423	10 005	979	1 272	1 386	308	462	34	187	4 862
IT	2 250	995	493	13 921	72	102	715	4 592	12 364		0	164	212	193	1 561	2 196	7 101	1 063	570	1 943	970	14	134	1 140
CY	0	-	-	0	-	-	8	0	0	1		-	-	-	-	1	0	0	0	0	-	-	-	1
LV	19	39	33	318	522	-	-	52	43	61	-		1 024	-	40	94	27	322	3	3	10	97	77	7
LT	105	81	35	853	261	7	1	54	145	160	-	692		4	71	130	23	939	2	13	39	69	62	52
LU	4 090	31	52	3 795	-	2	9	77	2 179	187	-	-		-	12	544	35	46	17	2	1	5	21	129
HU	233	757	42	2 430	14	7	46	212	380	909	-	26	53	22		345	1 227	974	17	244	2 191	52	87	165
NL	21 939	532	999	40 144	93	159	61	1 808	6 699	1 705	0	108	106	553	281		728	1 025	158	58	140	74	748	2 086
AT	630	2 384	166	19 696	9	-	38	386	839	4 581	0	33	37	68	1 260	1 069		526	-	665	1 080	12	139	212
PL	903	2 348	392	9 540	73	18	70	598	1 082	1 487	-	193	584	82	713	1 368	477		6	150	1 598	48	750	421
PT	280	39	28	829	-	10	7	11 250	1 424	680	-	3	4	0	20	308	-	21		15	11	4	16	277
SI	115	201	22	867	13	5	-	135	322	1 698	-	3	-	10	571	117	1 095	139	12		139	-	32	71
SK	192	3 174	40	1 661	2	-	21	145	264	604	-	2	21	7	1 574	151	779	1 041	-	148		19	64	85
FI	27	27	125	100	312	-	-	49	35	25	-	20	31	2	37	148	9	34	-	12	54		1 556	4
SE	252	248	2 722	1 725	133	-	-	261	226	195	0	83	61	7	101	842	144	737	46	32	62	2 327		31
UK	3 307	422	224	3 969	11	6 036	73	2 634	7 412	2 418	1	15	58	237	257	3 692	414	795	341	94	98	3	39	

Table 4, showing country-to-country flows in tonnes in 2005, illustrates the dominance of Germany, the EU's largest economy, as a trading partner. As a market for goods moving from other countries, Germany ranks top in 8 out of 23 possible relations, with France, Italy and Latvia accounting for 2 relations each. As a supplier, Germany was the main source in 7 out of the 23 relations, with France accounting for 3 relations, Belgium and Italy for 2 each. 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 and Italy. 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 Germany and the Netherlands at around 40 million tonnes in each direction, a reflection of the major role of the port of Rotterdam.

Table 5: Main country-to-country flows in intra-EU-25 road goods transport, 2005 - million tonnes

Rank	Pair of countries	Total Tonnes	% hauliers of first country	% hauliers second country	% all other reporting hauliers	Main other haulier
1	DE NL	78.3	28.8	68.0	3.2	BE
2	BE FR	54.7	54.8	35.4	9.8	NL
3	DE FR	48.0	61.6	22.6	15.8	LU
4	BE NL	46.7	27.3	70.9	1.8	DE
5	BE DE	38.5	31.2	48.1	20.7	NL
6	ES FR	36.3	73.9	17.5	8.6	PT
7	AT DE	32.1	48.9	45.8	5.3	CZ
8	DE IT	28.4	40.8	41.9	17.3	AT
9	FR IT	25.3	39.0	53.0	8.0	LU
10	ES PT	20.5	33.0	66.5	0.5	DE
11	DE PL	18.7	11.0	87.9	1.1	CZ
12	CZ DE	17.2	82.9	13.8	3.3	PL
13	IE UK	17.0	43.0	56.6	0.4	NL
14	FR NL	16.7	11.3	69.3	19.4	BE
15	DE DK	13.1	51.4	41.0	7.6	LU
16	DE ES	12.4	24.9	60.2	14.9	PT
17	FR UK	12.3	40.5	40.0	19.5	NL
18	AT IT	11.7	69.7	17.9	12.4	DE

Table 5 views the flows from another perspective. The table shows for 2005 the top 18 country to country flows in tonnes but adds the percentage of the movements undertaken by the hauliers of the two countries involved and those of other countries. The top country to country pair is Germany/Netherlands at 78.3 million tonnes, followed by Belgium/France, Germany/France and Belgium/Netherlands, all over 40 million tonnes. Germany appears in 9 of the 18 country to country pairs, France in 6, the Netherlands, Belgium, Spain and Italy in 3 and Austria and the UK in 2. Two new Member States, Poland and the Czech Republic, also appear in the list in conjunction with Germany. In terms of the performance of national hauliers, the Dutch companies seem to be very efficient, accounting for around 70% of the flows between the Netherlands and Germany, Belgium and France. They also account for a substantial proportion of the flows between Belgium and France (10%), Belgium and Germany (21%) and France and the UK (20%). Also very competitive are the Polish and Czech hauliers, each taking over 80% of the movements to and from Germany. The Czechs also managed to take 5% of the German/Austrian movements. The performance of Belgian hauliers is patchy, doing less well against their Dutch or German counterparts but holding their own against the French. They also took 19% of the movements between France and the Netherlands. The French hauliers generally underperformed, only holding their own against their UK counterparts. Austrian hauliers held their own and managed to take 17% of the movements between Germany and Italy.

Table 6 gives another twist to the data, looking at the main destinations and origins for the movements of each country in 2005 and showing how large a percentage of the total this formed. The main flows between Germany and the Netherlands accounted for about a quarter of the German total and somewhat under a half of the Dutch total. This reflects the importance of the port of Rotterdam to both the German and Dutch economies. Austria also shows a high dependence on movements with Germany with around half involving that country. In contrast, the Czech Republic and Poland, while having Germany as their major partner, show a slightly more diversified spread of flows. Another relation of note is that between the UK and Ireland. With both countries' single shared land boundary involved, around 90% of Ireland's movements are with the UK. Ireland is also a major partner for the UK but not to quite the same extent.

Table 6: Goods leaving the country (international transport loaded and cross-trade), Goods entering the country (international transport unloaded and cross-trade) by main partner of each country, 2005 - million tonnes

Relation with the main partner						
	Main destination	Tonnes to main destination	% of total leaving	Main origin	Tonnes from main origin	% of total entering
BE	FR	31.5	35	NL	24.8	31
CZ	DE	9.9	41	DE	7.3	37
DK	DE	5.8	42	DE	7.3	44
DE	NL	40.1	22	NL	38.1	24
EE	LV	0.5	22	LV	0.6	30
IE	UK	6.0	88	UK	10.9	92
EL	IT	0.7	37	IT	0.8	34
ES	FR	16.8	35	FR	19.6	40
FR	BE	23.1	22	BE	31.5	28
IT	DE	14.5	26	DE	13.9	25
CY	EL	0.0	67	EL	0.0	73
LV	LT	0.7	21	LT	1.0	33
LT	LV	1.0	23	PL	0.9	23
LU	DE	3.1	34	BE	4.1	36
HU	DE	1.9	17	DE	2.4	22
NL	DE	38.1	42	DE	40.1	49
AT	DE	12.4	42	DE	19.7	57
PL	DE	9.2	36	DE	9.5	40
PT	ES	9.2	72	ES	11.3	73
SI	IT	1.9	32	IT	1.7	27
SK	CZ	3.2	24	CZ	3.2	31
FI	SE	2.3	56	RU	2.2	43
SE	NO	3.6	27	DK	2.7	22
UK	IE	10.9	40	FR	7.4	23
LI	AT	0.1	46	DE	0.1	56
NO	SE	2.2	51	SE	3.6	57

► 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, Liechtenstein 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 Liechtenstein and Norway). Road freight transport performed by other extra-EU operators is not covered, even if it may be significant in relations with Switzerland and Russia, for example.

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 (the declarations from unknown partners are ignored).

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 (the declarations to unknown partners are ignored).

'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'.

Bulgaria

Bulgaria had no obligation to report for years prior its accession in 2007 and started to report data for the reference year 2006.

Malta

No road freight transport data have been reported by Malta in 2004 and 2005.

Romania

Romania had no obligation to report for years prior its accession in 2007 and started to report data for the reference year 2006.

Liechtenstein

No road freight transport data have been reported by Liechtenstein in 2004.

Graph 1

This graph 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 2

New Member states refers to the 10 countries that joined the European Union in May 2004.

Graph 2, Graph 3, Graph 4, Table 3, Table 4, Table 5

These tables and graphs present intra-EU-25 road freight transport and thus the transport reported by Liechtenstein and Norway is excluded.

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 (dataset A3).

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 16 March 2007.

In this publication:


- : not available
- not applicable
- 0 for less than half of the measurement unit
- 1 billion = 1 000 000 000

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

Further information:

Data: [EUROSTAT Website/Home page/Transport/Data](#)

 Transport

 Transport - Horizontal view

 Railway transport

 Road transport

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