

Global economic crisis hits European road freight transport in the fourth quarter of 2008

Road freight transport in 2008

European road freight transport has fallen sharply after the third quarter of 2008. Of the large EU countries, France, Spain and the United Kingdom have suffered more than the new Member State Poland.

Germany, France and Spain all experienced a decrease in road transport in the fourth quarter of 2008 and the first quarter of 2009 and the provisional data for the United Kingdom confirm this trend for 2008. No information is available for Italy.

Both national and international transport declined further in the first quarter of 2009.

Road transport in Portugal shrank by more than 15% between 2007 and 2008. In contrast, Slovenian

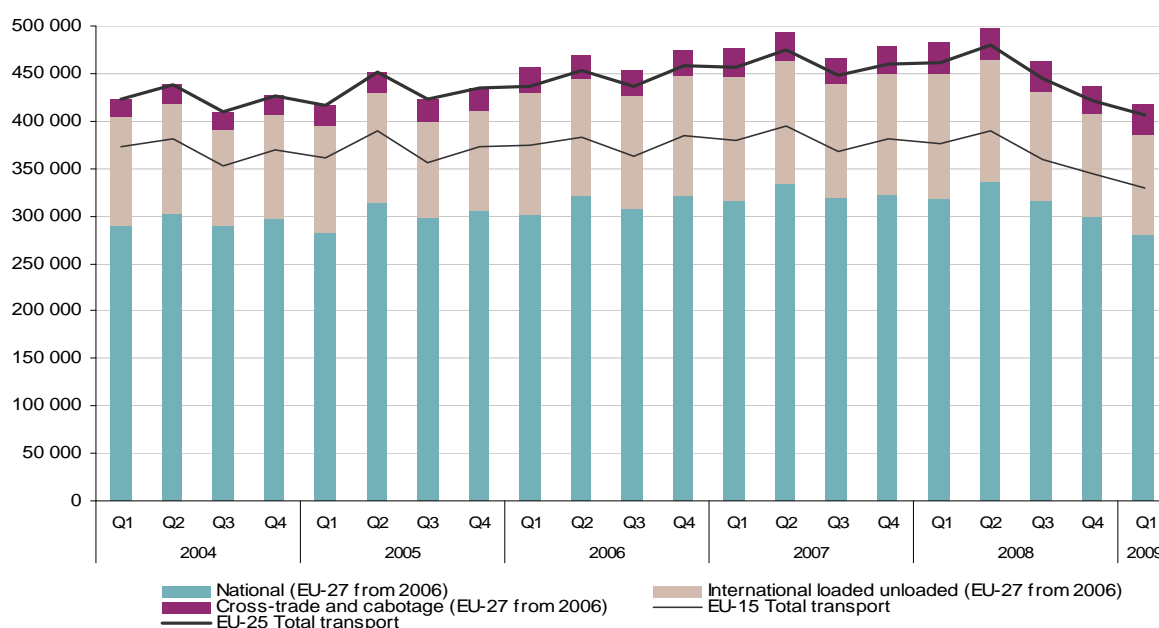
road transport increased by 18% between the same years and Estonian road transport rose by nearly 15%.

Belgium experienced the highest cabotage penetration at nearly 5%, followed by Denmark, France, Austria and Sweden.

Food, beverages and tobacco emerged as the largest commodity group transported by road (measured in tonne-kilometres). The products of mining and quarrying, mainly building materials, was by far the largest in terms of the tonnage lifted.

Specialist haulage companies dominated the supply of transport in all countries, accounting for more than 80% of transport performance (tonne-kilometres).

Graph 1: Quarterly road freight transport - million tonne-km



IT: 2007 data was used for 2008; EL: Q1 2008 data was used for Q1 2009; UK provisional data used for 2008 and Q1 2009 was estimated.

Source: Eurostat (road_go_tq_tot)

Downturn in European road transport in the fourth quarter of 2008

Table 1: National, international loaded and unloaded, cross-trade and cabotage transport, 2007 and 2008 - million tonne-km

	2007					2008					Change 2007-2008 (%)				
	National	International	Cross-trade	Cabotage	Total	National	International	Cross-trade	Cabotage	Total	National	International	Cross-trade	Cabotage	Total
BE	19 650	18 090	2 815	1 529	42 084	18 207	16 265	2 339	1 546	38 357	-7.3	-10.1	-16.9	1.1	-8.9
BG	5 890	6 834	1 822	78	14 624	7 122	5 786	2 277	137	15 322	20.9	-15.3	25.0	75.6	4.8
CZ	15 831	23 849	8 214	248	48 142	15 748	25 123	9 713	293	50 877	-0.5	5.3	18.2	18.1	5.7
DK	11 800	8 468	400	293	20 961	10 718	8 252	255	254	19 479	-9.2	-2.6	-36.3	-13.3	-7.1
DE	261 440	70 717	8 743	2 546	343 446	264 545	65 614	8 592	2 781	341 532	1.2	-7.2	-1.7	9.2	-0.6
EE	1 942	3 558	754	163	6 417	1 832	3 963	1 343	216	7 354	-5.7	11.4	78.1	32.5	14.6
IE	14 428	3 731	443	418	19 020	13 265	3 187	377	573	17 402	-8.1	-14.6	-14.9	37.1	-8.5
EL	21 729	5 895	102	65	27 791	24 346	4 458	28	18	28 850	12.0	-24.4	-72.5	-72.3	3.8
ES	190 611	65 547	1 892	825	258 875	175 184	64 270	2 445	1 085	242 984	-8.1	-1.9	29.2	31.5	-6.1
FR	191 388	26 478	777	569	219 212	181 879	23 466	530	429	206 304	-5.0	-11.4	-31.8	-24.6	-5.9
IT	152 406	24 950	1 116	939	179 411	152 406	24 950	1 116	939	179 411	:	:	:	:	:
CY	1 184	17	-	-	1 201	1 296	12	-	-	1 308	9.5	-29.4	-	-	8.9
LV	3 006	6 644	3 514	39	13 203	2 536	5 812	3 945	50	12 343	-15.6	-12.5	12.3	28.2	-6.5
LT	2 704	9 465	8 041	69	20 279	2 560	9 375	8 409	75	20 419	-5.3	-1.0	4.6	8.7	0.7
LU	548	2 638	4 129	2 248	9 563	787	2 728	4 332	2 685	10 532	43.6	3.4	4.9	19.4	10.1
HU	13 186	15 897	6 597	126	35 806	13 043	15 407	7 141	168	35 759	-1.1	-3.1	8.2	33.3	-0.1
NL	30 686	37 830	7 407	1 999	77 922	32 009	36 195	7 391	2 563	78 158	4.3	-4.3	-0.2	28.2	0.3
AT	14 744	17 172	4 800	686	37 402	14 588	15 146	3 950	642	34 326	-1.1	-11.8	-17.7	-6.4	-8.2
PL	65 769	62 424	21 589	1 098	150 880	71 917	67 492	24 567	954	164 930	9.3	8.1	13.8	-13.1	9.3
PT	18 319	23 368	3 589	927	46 203	17 114	18 056	3 035	886	39 091	-6.6	-22.7	-15.4	-4.4	-15.4
RO	23 932	35 479	51	61	59 523	23 190	32 100	999	97	56 386	-3.1	-9.5	1858.8	59.0	-5.3
SI	2 573	7 608	3 303	250	13 734	2 636	8 612	4 624	389	16 261	2.4	13.2	40.0	55.6	18.4
SK	5 617	13 085	8 241	216	27 159	6 319	12 934	9 759	264	29 276	12.5	-1.2	18.4	22.2	7.8
FI	25 956	3 624	84	147	29 811	27 615	2 108	101	33	29 857	6.4	-41.8	20.2	-77.6	0.2
SE	36 395	3 563	430	152	40 540	37 952	3 614	582	222	42 370	4.3	1.4	35.3	46.1	4.5
UK	160 425	10 574	194	285	171 478	150 960	10 109	185	272	161 526	-5.9	-4.4	-4.6	-4.6	-5.8
EU-25	1 262 337	465 192	97 174	15 837	1 840 540	1 239 462	447 148	104 759	17 337	1 808 706	-1.8	-3.9	7.8	9.5	-1.7
EU-27	1 292 159	507 505	99 047	15 976	1 914 687	1 269 774	485 034	108 035	17 571	1 880 414	-1.7	-4.4	9.1	10.0	-1.8
HR	:	:	:	:	:	6 445	3 850	746	2	11 043	:	:	:	:	:
LI	:	80	235	23	338	:	79	239	20	338	:	-1.3	1.7	-13.0	0.0
NO	15 427	3 869	37	42	19 375	16 658	3 876	15	47	20 596	8.0	0.2	-59.5	11.9	6.3
CH	:	:	:	:	:	9 548	1 527	157	77	11 309	:	:	:	:	:

BG: 2007 cross-trade and cabotage data revised by national statistical authorities; IT: 2007 data was used for the reference year 2008; UK: provisional data 2008. RO data on cross-trade are based on few observations. Symbols: : not available, - not applicable.

Source: Eurostat ([road_go_ta_tot](#))

Graph 1 shows a downward trend in European road freight transport statistics in the third quarter of 2008. The fall between the second and third quarters can be attributed to normal seasonal variation, but the fall exceptionally continued in the fourth quarter and accelerated into the first quarter of 2009 with the onset of the global economic crisis.

Table 1 shows that the impact of the crisis was felt mainly by the old Member States with falls between 2007 and 2008 recorded by many. Germany, France, Spain and the United Kingdom, the four large economies able to report figures for 2008, saw total road transport drop at the end of 2008. This reflected the trends in the EU-15 as a whole.

Belgium, Denmark and Portugal recovered in the first quarter of 2009 although their figures were still below the level of a year earlier (detailed quarterly data are available in Eurostat's reference database, table [road_go_tq_tot](#)). It is worth noting that seasonal variation plays an important role in road freight performance, the second quarter of the

year showing normally the strongest performance (Figure 1).

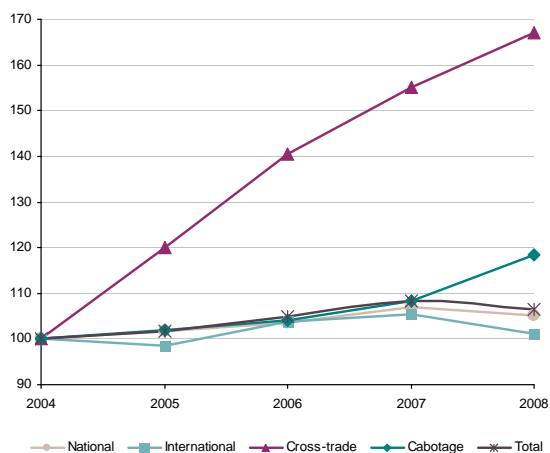
In the new Member States, strong growth was recorded between 2007 and 2008 in many cases, particularly in Slovenia, Estonia and Poland. However, for Slovenia and Estonia only small volumes of transport are involved.

In all these cases, the strong growth owed much to success in international and cross-trade transport, except for Poland where national transport was also a major factor. However, even Poland suffered a decline in the fourth quarter of 2008 but then recorded a recovery in the first quarter of 2009 to reach a level higher than in the first quarter of 2008. Bulgaria and Luxembourg were the only other countries to achieve this. Other new Member States suffered a decrease in transport at the end of 2008 and the beginning of 2009, particularly Estonia, Latvia, Romania and Slovakia.

At the annual level, some of the new Member States, Latvia and Romania, recorded falls in transport performance between 2007 and 2008.

Cross-trade maintains momentum

Graph 2: Evolution of EU-27 road freight transport - based on tonne-km (2004=100)



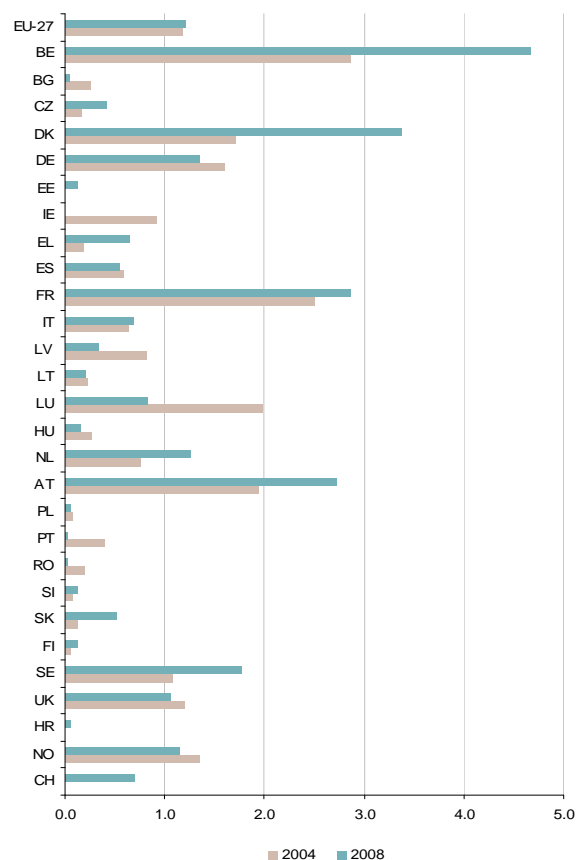
IT: 2007 data was used for the reference year 2008; UK: provisional data 2008. Without BG and RO.

Source: Eurostat ([road_go_ta_tot](#))

Graph 2 shows that cross-trade (transport of goods from one country to a second country by a haulier registered in a third country) has grown very rapidly since 2004, rising by more than 50% while total transport rose by less than 10%. While the margins of uncertainty in the cross-trade figures are larger than for transport as a whole, the trend does suggest that the new Member States have profited to a substantial degree from the opening of a new market for their hauliers. All of them, except for Cyprus, continued to show a strong growth in their cross-trade between 2007 and 2008.

Five countries experienced high rates of cabotage (Graph 3). Cabotage is the national transport of one Member State being undertaken by hauliers from another Member State. Belgium, Denmark, France, Austria and Sweden all recorded rates above 2% and nearly 5% in the case of Belgium.

Graph 3: Cabotage penetration rate by country in which cabotage takes place (% of tonne-km)



IT: 2007 data was used for the reference year 2008; UK: provisional data 2008. BG, RO, EU-27: 2006 data was used for the reference year 2004.

Source: Eurostat ([road_go_ta_tot](#) and [road_go_ca_c](#))

Graph 3 also shows that the figures on cabotage penetration of individual countries vary considerably from 2004 to 2008, even if the general level is fairly stable.

Food and beverages keep the wheels turning, construction weighs them down

A new commodity classification has been introduced for all transport modes in 2008. In the new NST 2007 classification, there have been changes to all commodity groups compared to the previous NST/R. New groups have been introduced, covering secondary raw materials including municipal waste, mail and parcels, equipment used in transport and household and office removals. Secondary raw materials and municipal waste has emerged as a single transport

category. This new group in total accounts for 7% of total tonnage and 3% of tonne-kilometres.

All this means that there has been a reduction in the figures recorded for the headings for unidentifiable commodities. Overall, this leads to a better appreciation of the transport market by goods type.

The products of mining and quarrying, mainly building materials, was by far the largest category in the new classification in terms of the tonnage lifted.

Table 2: EU-27 total transport by group of goods, 2008 - tonnes and tonne-kilometres

Group	NST 2007	Thousand Tonnes	Million Tonne-kilometres
01	Products of agriculture, hunting, and forestry; fish and other fishing products	998 217	154 089
02	Coal and lignite; crude petroleum and natural gas	118 119	8 052
03	Metal ores and other mining and quarrying products; peat; uranium and thorium	4 502 189	133 087
04	Food products, beverages and tobacco	1 282 294	233 933
05	Textiles and textile products; leather and leather products	49 701	19 279
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	532 806	114 125
07	Coke and refined petroleum products	467 738	42 622
08	Chemicals, chemical products, and man-made fibers; rubber and plastic products ; nuclear fuel	614 729	117 647
09	Other non metallic mineral products	1 892 244	144 710
10	Basic metals; fabricated metal products, except machinery and equipment	511 880	119 462
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	296 229	63 812
12	Transport equipment	227 103	62 411
13	Furniture; other manufactured goods n.e.c.	113 871	36 099
14	Secondary raw materials; municipal wastes and other wastes	1 003 489	46 904
15	Mail, parcels	73 997	20 279
16	Equipment and material utilized in the transport of goods	218 045	33 929
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.	50 493	5 950
18	Grouped goods: a mixture of types of goods which are transported together	509 980	114 208
19	Unidentifiable goods: goods which for any reason cannot be identified and therefore cannot be assigned to groups 01-16.	210 657	42 944
20	Other goods n.e.c.	115 469	18 499
	Total	13 789 250	1 532 041

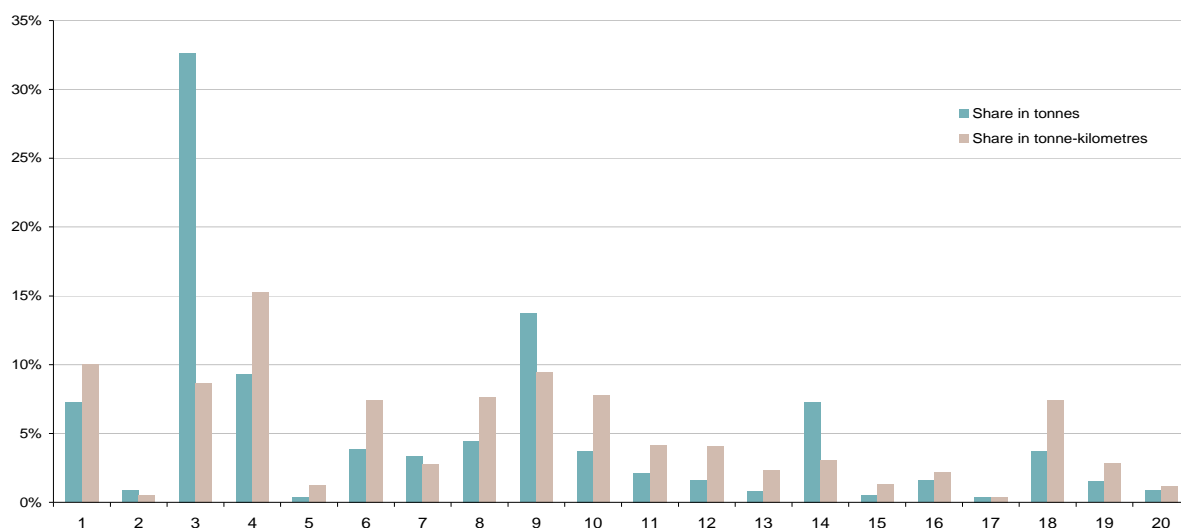
IT, UK: Data for the reference year 2008 are not available; SE and NL data are provisional.

Source: Eurostat ([road_go_ta_tq](#))

It was followed by other non metallic mineral products, again largely construction related, and then at some distance by food, beverages and tobacco, agricultural products and the new group municipal and other wastes. However, once the distances are taken into account by measuring tonne-kilometres, food, beverages and tobacco come to the fore with 15% of the total, followed by agricultural products and then the two groups of

construction related materials at around 10% each. This reflects the fact that heavy construction materials are either sourced locally or will be transported over longer distances by modes other than road. The average distance travelled by mining and quarrying products and secondary raw materials was around 30 km while the average for food, beverages and tobacco was 180 km.

Graph 4: Share by group of goods in EU-27 total transport, 2008 - tonnes and tonne-kilometres



IT, UK: Data for the reference year 2008 are not available.

Source: Eurostat ([road_go_ta_tq](#))

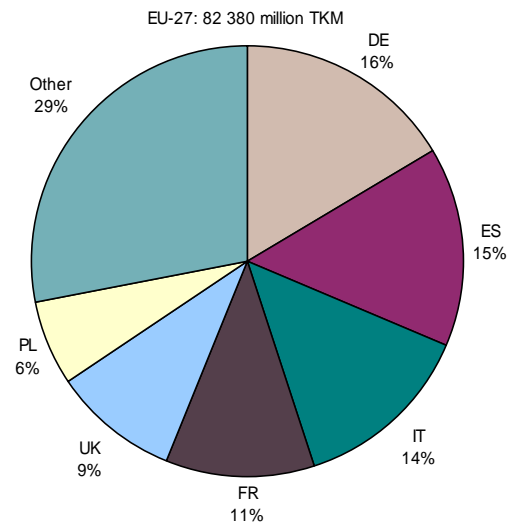
Information is collected on the transport of dangerous goods. These cover explosives, gases and flammable liquids and solids, toxic and corrosive substances, radioactive material and indeed any material or substance where their involvement in an accident is likely to trigger major safety and security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

Road transport of dangerous goods represents 4% of the total transport (82 billion tonne-km). Graph 5 shows that hauliers in the 6 main European economies, Germany, Spain, Italy, France, the UK and Poland accounted for nearly 75% of the transport of dangerous goods in 2008.

Graph 6 shows that the figures for dangerous goods transport have been growing more slowly than for total transport. This applies particularly to dangerous goods other than flammable liquids.

The methodology being used in the collection of the data means that there are considerable uncertainties about the figures, if presented in a more detailed breakdown. Total transport of dangerous goods by reporting country, broken down to flammable liquids (the biggest category) and other dangerous goods, is still reliable.

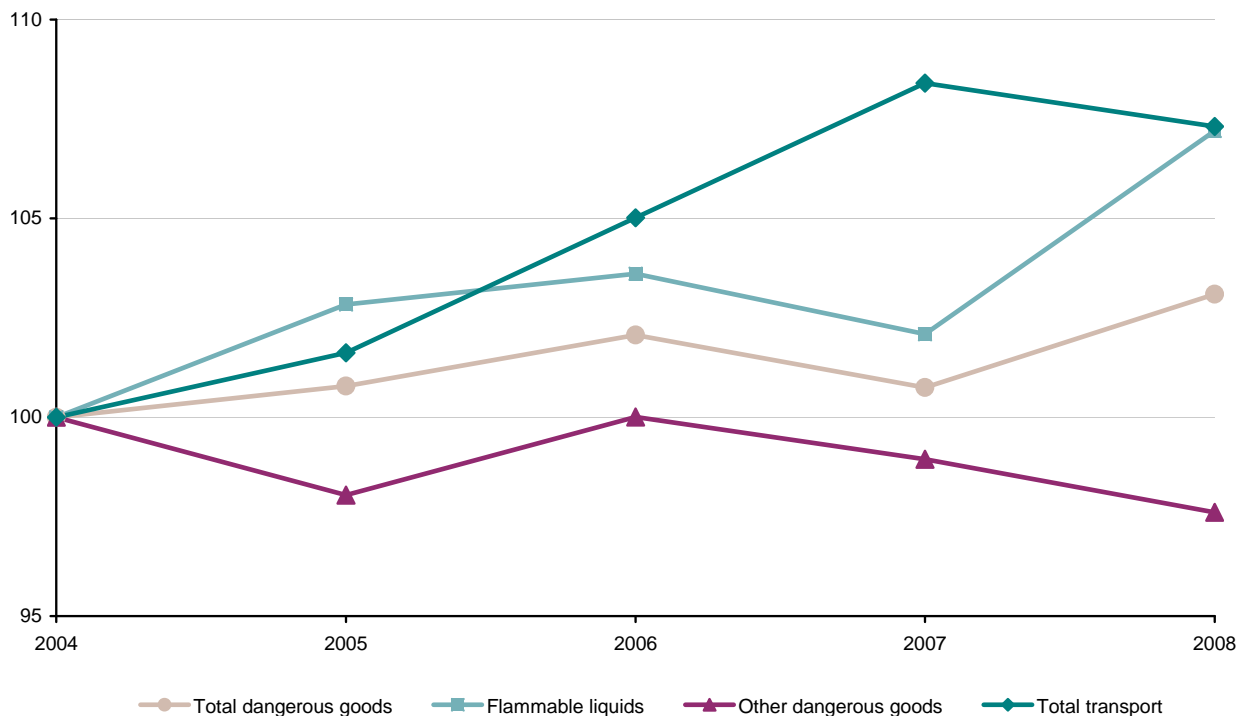
Graph 5: Share of countries in EU-27 transport of dangerous goods, 2008 - % in tonne-km



IT, UK: 2007 data was used for the reference year 2008

Source: Eurostat ([road_go_ta_dg](#))

Graph 6: Evolution of EU-27 transport of dangerous goods - based on tonne-km (2004=100)

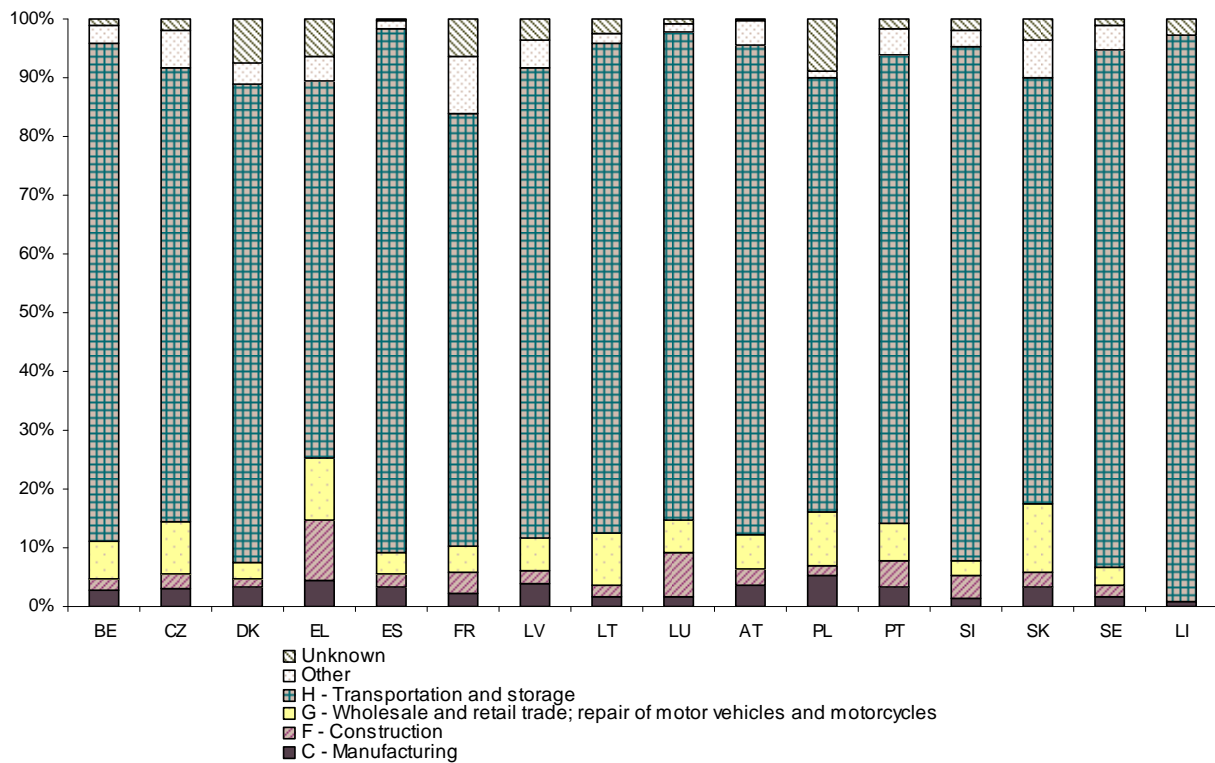


IT, UK: 2007 data was used for the reference year 2008; Without BG, HU and RO.

Source: Eurostat ([road_go_ta_dg](#))

Transport firms take the lion's share of road transport

Graph 7: Road freight transport by economic activity (NACE), 2008 - million tonne-km

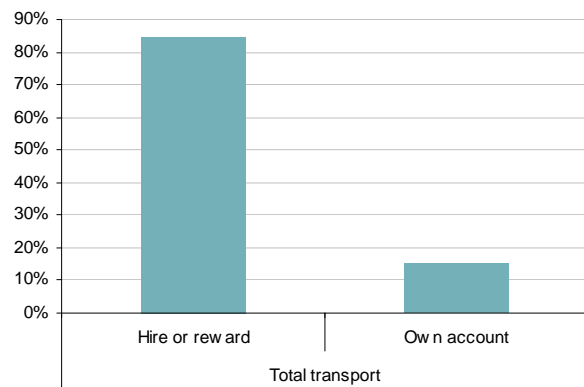


Source: Eurostat ([road_go_ta_nace](#))

17 reporting countries have supplied data about the economic activity of the companies undertaking road transport. In all cases, transport companies provided the lion's share of road transport. Another significant economic group undertaking road transport was the wholesale and retail trade, mainly transporting goods to retail stores and distribution centres linked to the company involved. Construction and manufacturing, which involves the own account transport of products and materials, are also important. Reporting the economic activity of hauliers is optional, with the result that the data may be incomplete.

Graph 8 shows that most of road freight transport is commercial and that transport on own account is relatively small. Enterprises carrying out road freight transport for hire or reward are usually registered under section H of the NACE.

Graph 8: Road freight transport by type of transport, 2008 - % in tonne-km



Includes data for HR, NO, CH and EU-27 (without IT and UK).

Source: Eurostat ([road_go_ta_tot](#))

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, 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 for years prior to their accession in 2007, they started to report data for the reference year 2006.

Ireland: The national survey methodology is currently being updated. Data is subject to revision.

Italy: Data for 2008 have not been reported yet; therefore 2007 data have been used instead.

Malta: Malta has not reported any road transport data.

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

Liechtenstein: Liechtenstein reports only international road freight.

United Kingdom: Provisional data was used for 2008. Data of Q1 2008 were used for the first quarter 2009.

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

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.

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 (http://ec.europa.eu/eurostat/ramon/index.cfm?TargetUrl=DSP_PUB_WELC).

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.

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.

More detailed data and metadata are available in the Eurostat dissemination database and on CIRCA: http://epp.eurostat.ec.europa.eu/portal/page/portal/statistics/search_database

http://circa.europa.eu/Public/irc/dsis/transport/library?l=03_road&vm=detailed&sb=Title

Data availability

The figures presented in this publication have all been taken from Eurostat's free dissemination database and reflect the state of data availability as of 15th October 2009.

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, EEA and EFTA countries: Croatia (HR), Liechtenstein (LI), Norway (NO), Switzerland (CH).

Estimates are presented in italics. In Table 1, 2007 data for Italy were used for the reference year 2008.

In this publication: 1 billion = 1 000 000 000
- not applicable
: not available

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

Further information

Eurostat Website: <http://ec.europa.eu/eurostat>

Data on "Transport statistics":

<http://epp.eurostat.ec.europa.eu/portal/page/portal/transport/data/database>

More information about "Transport statistics":

<http://epp.eurostat.ec.europa.eu/portal/page/portal/transport/introduction>

Journalists can contact the media support service:

Bech Building Office A4/125 L - 2920 Luxembourg

Tel. (352) 4301 33408 Fax (352) 4301 35349

E-mail: eurostat-mediasupport@ec.europa.eu

European Statistical Data Support:

Eurostat set up with the members of the 'European statistical system' a network of support centres, which will exist in nearly all Member States as well as in some EFTA countries.

Their mission is to provide help and guidance to Internet users of European statistical data.

Contact details for this support network can be found on our Internet site:

<http://ec.europa.eu/eurostat/>

A list of worldwide sales outlets is available at the:

Office for Official Publications of the European Communities.

2, rue Mercier

L - 2985 Luxembourg

URL: <http://publications.europa.eu>

E-mail: info@publications.europa.eu

Manuscript completed on: 18.11.2009

Data extracted on: 15.10.2009

ISSN 1977-0316

Catalogue number: KS-SF-09-086-EN-N

© European Communities, 2009