Employment in foreign-controlled multinational enterprise transport groups

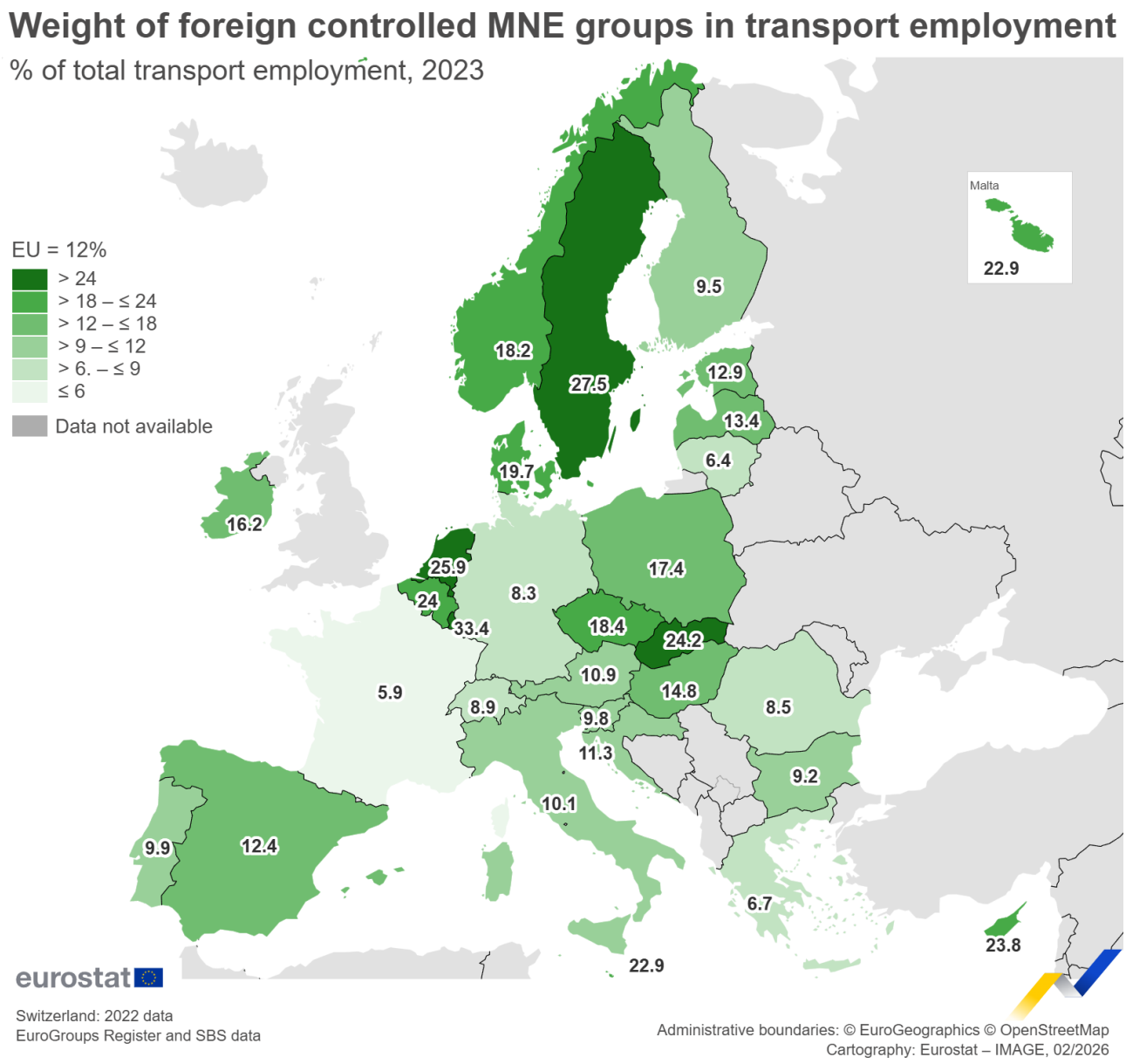
Statistics Explained

Statistics under development

Data extracted in October 2025
No planned article update

Highlights

Between 2018 and 2023, the number of people employed in transport and storage enterprises belonging to foreign-controlled multinational enterprise groups increased by 30%, reaching around 1.3 million in 2023.



Map 1: Weight of transport enterprises belonging to foreign-controlled MNE groups, EU, 2023 Source: EuroGroups Register and SBS data

This article is based on statistics under development provided by the EuroGroups Register (EGR) . Multinational enterprise (MNE) groups play a major role in the EU economy. This article examines the share of employment in the transport and storage sector (NACE section H) enterprises belonging to foreign-controlled MNE groups. The data refer mainly to the reference year 2023.

From 2018 to 2023, foreign-controlled MNE groups increased their workforce in transport and storage by 30%, reaching 1.3 million employees, or 12% of sector employment. Predominantly, these were EU or EFTA enterprises focused on transport support, road freight, and postal services. Highest employment rates were found in Benelux , Scandinavia , Poland, Czechia, and Slovakia, with France having the lowest in the EU. Globally, Germany and France were top employers abroad, while outside the EU-EFTA territory, the United States and the United Kingdom emerged as key players in the transport sector.

About 1.3 million people employed in enterprises belonging to foreign-controlled MNE groups

The number of people employed in transport and storage enterprises belonging to foreign-controlled MNE groups increased by 30% between 2018 and 2023. It exceeded one million in 2019 and reached nearly 1.3 million in 2023.

Two thirds of these people worked for companies belonging to MNE groups controlled by EU or EFTA countries. This broad region of control was more dynamic (+33% between 2018 and 2023) than the rest of the world (+25%).

Figure 1

Of which more than half in support activities for transport

The overall share of people employed in transport and storage enterprises belonging to foreign-controlled MNE groups stood at 12.0% in 2023. Support activities for transport at 25.3%, water transport (NACE division H50) at 25.0%, and air transport (NACE division H51) at 20.8% had the highest proportions of people employed in companies belonging to foreign-controlled MNE groups. This high concentration in support activities for transport explains why this sector accounted for 24% of total employment, but 51% of employment in companies belonging to foreign-controlled MNE groups (and even 59% of employment in companies belonging to foreign-controlled MNE groups by non-EU non-EFTA countries).

In absolute terms, road freight transport ranked second, with 210 000 people employed. They accounted for only 6% of total employment in this activity, half of the overall average share for the transport and storage sector (NACE section H).

Postal and courier services ranked third with 138 000 people employed, just before other land transport (NACE groups H49.3 and H49.5) with 126 000 people employed.

Rail transport (NACE groups H49.1 and H49.2) was proportionally the least affected, with 5.6% of total employment.

Employment in transport enterprises belonging to foreign-controlled MNE groups by main activity, EU, 2023
(persons employed, in thousands and % of total employment)

	Total employment (1)	of which MNE foreign controlled	of which MNE foreign controlled by EU-EFTA country	of which MNE foreign controlled by non-EU non-EFTA country
Transportation and storage (H)	10 627	1 275	858	418
Rail transport (H49.1 + H49.2)	550	31	26	5
Road freight transport (H49.4)	3 500	210	177	32
Other land transport (H49.3 + H49.5)	1 927	126	97	30
Water transport (H50)	210	53	22	31
Air transport (H51)	300	63	55	8
Support activities for transport (H52)	2 590	656	411	245
Postal and courier services (H53)	1 590	138	71	67

	% MNE foreign controlled	% MNE foreign controlled by EU-EFTA country	% MNE foreign controlled by non-EU non-EFTA country
Transportation and storage (H)	12.0	8.1	3.9
Rail transport (H49.1 + H49.2)	5.6	4.7	0.8
Road freight transport (H49.4)	6.0	5.1	0.9
Other land transport (H49.3 + H49.5)	6.5	5.0	1.5
Water transport (H50)	25.0	10.4	14.6
Air transport (H51)	20.8	18.3	2.6
Support activities for transport (H52)	25.3	15.8	9.5
Postal and courier services (H53)	8.7	4.5	4.2

(1) SBS data are still provisional for reference year 2023
Source: EuroGroups Register and SBS data

eurostat

Table 1: Employment in transport enterprises belonging to foreign-controlled MNE groups by main activity, EU, 2023 Source: EuroGroups Register and SBS data

Employment in MNE groups by EU country

In absolute terms, based on employment in enterprises belonging to foreign-controlled MNE groups, Germany ranked first among EU and EFTA countries (191 000 people), followed by Poland (167 000), Spain (126 000), Italy (120 000) and the Netherlands (113 000). Together these 5 countries accounted for 56% of total employment in transport businesses belonging to foreign-controlled MNE groups within the EU.

Employment in transport enterprises belonging to foreign-controlled MNE groups, by country of the enterpri
(persons employed, in thousands)

	Total employment [1]	of which MNE foreign controlled	of which MNE foreign controlled by EU-EFTA country	of which MNE foreign controlled by non-EU non-EFTA country
EU	10 627	1 275	858	418
Belgium	229	55	35	20
Bulgaria	154	14	13	1
Czechia	293	54	42	12
Denmark	156	31	22	9
Germany	2 309	191	119	72
Estonia	37	5	4	1
Ireland	113	18	13	5
Greece	179	12	7	5
Spain	1 019	126	63	63
France	1 496	88	59	29
Croatia	80	9	7	2
Italy	1 186	120	56	64
Cyprus	22	5	4	1
Latvia	66	9	7	2
Lithuania	188	12	11	1
Luxembourg	25	8	7	1
Hungary	197	29	22	7
Malta	18	4	3	1
Netherlands	435	113	81	32
Austria	226	25	22	3
Poland	958	167	116	51
Portugal	222	22	18	4
Romania	443	38	28	10
Slovenia	56	6	5	1
Slovakia	120	29	25	4
Finland	130	12	11	1
Sweden	270	74	60	14
Norway	145	26	18	8
Switzerland [2]	245	22	19	3

(1) SBS data are still provisional for reference year 2023

(2) 2022 data

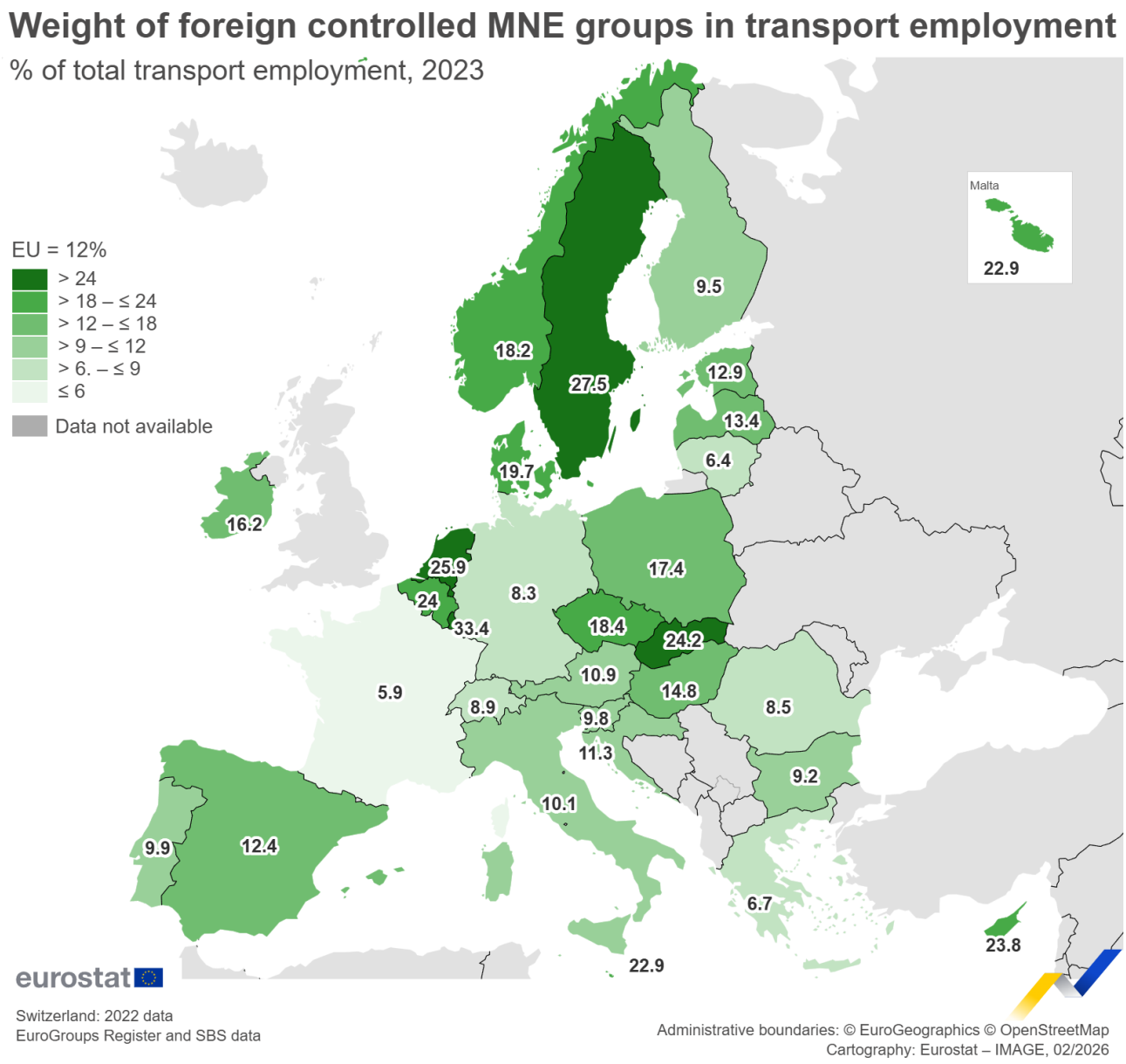
Source: EuroGroups Register and SBS data

eurostat

Table 2: Employment in transport enterprises belonging to foreign-controlled MNE groups, by country of the enterprise, 2023 Source: EuroGroups Register and SBS data

In relative terms, several countries had the shares of employment in enterprises belonging to foreign-controlled MNE groups above 18%: the Benelux and Scandinavian countries, as well as Slovakia, Cyprus, Malta and Czechia. Luxembourg topped the list with 33.4%, followed by Sweden (27.5%) and the Netherlands (25.9%).

On the opposite end of the scale, France is the
least affected among the EU, with 5.9%, followed by Lithuania (6.4%) and several South-Eastern European countries.



Map 1: Weight of transport enterprises belonging to foreign-controlled MNE groups, EU, 2023 Source: EuroGroups Register and SBS data

Enterprises belonging to foreign-controlled MNE groups by country and activity

The detailed analysis of activities by country is limited by the small number of reporting units or by the dominance of a few large companies belonging to foreign-controlled MNE groups. This is especially the case in air transport and water transport, where the situation across countries is highly contrasted.

Table 3 presents the percentages of employment in enterprises belonging to foreign-controlled MNE groups, where data is not affected by statistical confidentiality. This is generally the case for support activities for transport, road freight transport and postal and courier services. Among these 3 sectors of activity, employment in companies belonging to foreign-controlled MNE groups in Czechia presented a particularly high share in support activities for transport (55.6%), followed by Belgium (51.5%). In road freight transport such businesses were most prominent in Luxembourg (30.3% of total employment), Slovakia (15.8%) and Poland (10.9%). In postal and courier services Denmark (31.7%), Sweden (23.8%) and Estonia (22.3%) recorded the highest proportions.

Employment in selected activities of transport enterprises belonging to foreign-controlled MNE groups, by country of the enterprise, 2023
(% of total employment)

	Transportation and storage (H)	Rail transport (H49.1 + H49.2)	Road freight transport (H49.4)	Other land transport (H49.3 + H49.5)	Water transport (H50)	Air transport (H51)	Support activities for transport (H52)	Postal and courier services (H53)
EU	12.0	5.6	6.0	6.5	25.0	20.8	25.3	8.7
Belgium	24.0		9.6			>80	51.5	13.0
Bulgaria	9.2		4.6			37.9	23.7	17.5
Czechia	18.4		6.9				55.6	
Denmark	19.7		3.7				26.4	31.7
Germany	8.3	8.9	3.6				13.4	9.0
Estonia	12.9		5.1				29.0	22.3
Ireland	16.2		5.9				30.7	13.2
Greece	6.7						16.2	5.1
Spain	12.4		3.9				33.3	6.7
France	5.9		5.9				23.4	
Croatia	11.3	20.5	4.4				33.4	4.1
Italy	10.1	8.8	3.2		>50	42.0	14.5	
Cyprus	23.8						39.2	6.6
Latvia	13.4		7.1				25.2	15.4
Lithuania	6.4		3.3			78.7	17.4	8.6
Luxembourg	33.4		30.3					
Hungary	14.8		8.7				39.0	3.8
Malta	22.9					66.0	17.9	0.0
Netherlands	25.9		7.6			>80	44.4	17.0
Austria	10.9		7.0			50 - <80	24.1	9.0
Poland	17.4	10.0	10.9				42.0	15.8
Portugal	9.9		4.2				35.8	
Romania	8.5	7.3	8.5				21.1	8.3
Slovenia	9.8		4.4				22.4	5.4
Slovakia	24.2		15.8				48.3	9.1
Finland	9.5				34.8		24.3	
Sweden	27.5			44.2	30.0		46.3	23.8
Norway	18.2		4.4		30.7		36.7	
Switzerland (1)	8.9		1.4			50 - <80	17.3	

SBS data are still provisional for reference year 2023

(1) 2022 data

Source: EuroGroups Register and SBS data

eurostat

Table 3: Employment in selected activities of transport enterprises belonging to foreign-controlled MNE groups, by country of the enterprise, 2023 Source: EuroGroups Register and SBS data

EU and EFTA controlling countries in absolute terms and in relative shares

Statistics can also be compiled by EU and EFTA countries of control, showing the employment in enterprises abroad controlled by domestic MNE groups.

The enterprises in Table 3 are limited to EU countries, for consistency with Figure 2. Germany (232 000 people employed by German MNE groups in other EU countries) and France (176 000) were by far the most significant controlling countries, followed by the Netherlands (72 000) and the EFTA country Switzerland (69 000).

Figure 2German and French controlled MNE groups together accounted for nearly half of all people employed by enterprises belonging to foreign-controlled EU and EFTA MNE groups in the transport and storage sector across the EU. Their share was particularly high in postal and courier services (74% combined), air transport (over 65%), other land transport (60%) and support activities for transport (44%).

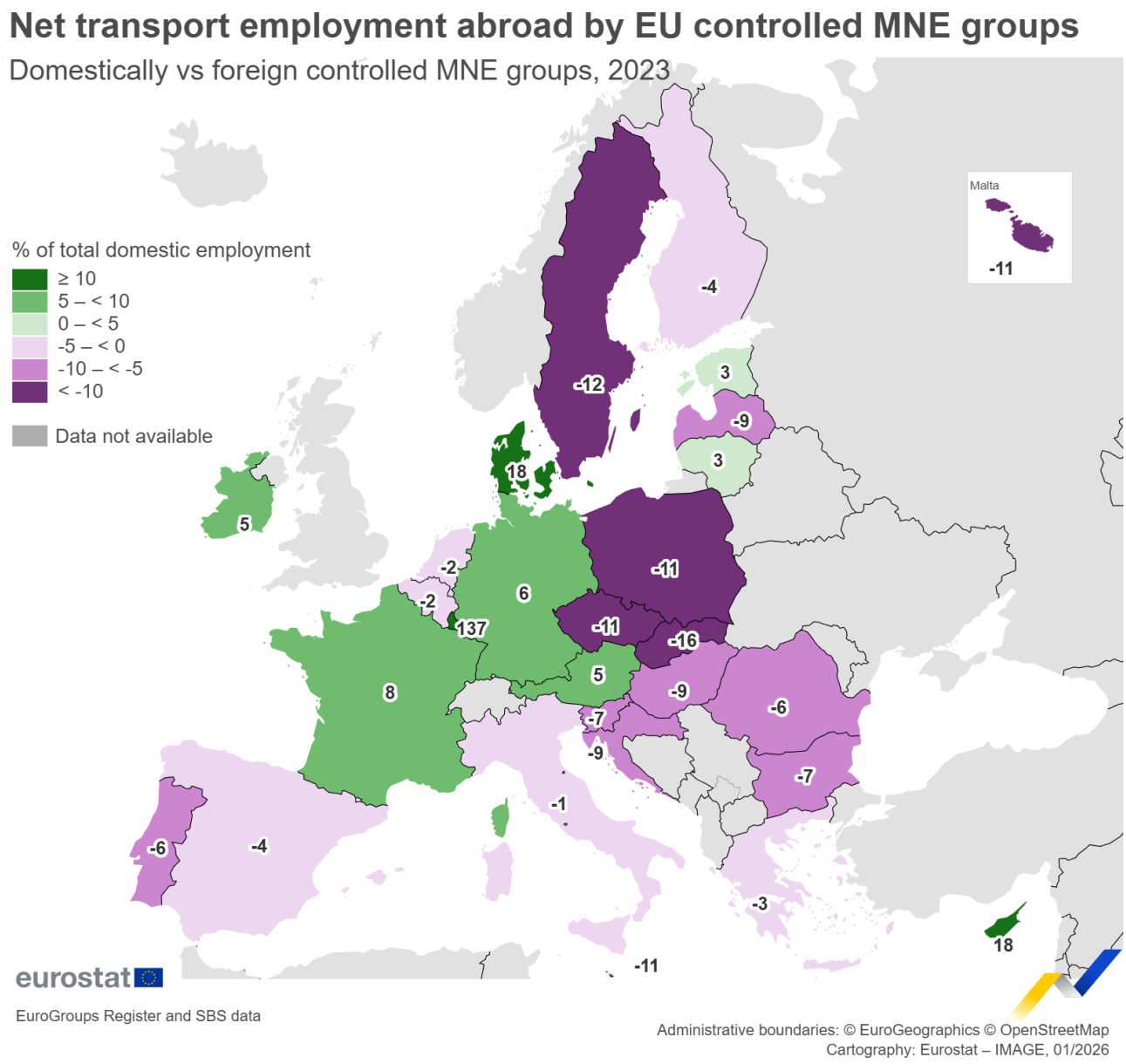
The Netherlands had high shares in road freight and in water transport, Denmark in water transport and in support activities for transport, Luxembourg in other land transport, Italy in water transport, Austria in rail transport, Ireland in air transport, Estonia in water transport, and Switzerland in support activities for transport . Water transport in overall was less concentrated.

Figure 3In relative terms (when the number of people employed abroad by domestic MNE groups is compared to the total domestic transport employment), Luxembourg, Denmark, Switzerland, Cyprus, the Netherlands, Ireland, Austria and Estonia surpassed France and Germany.

The EGR covers the EU countries in both dimensions: country of enterprise (i.e. enterprise resident in the country) and country of control (i.e. country of the unit ultimately controlling the MNE group to which the enterprise belongs). Each country can consider which phenomenon is the more important in its national case. In order to assess the impact of MNE groups on national economies, we have calculated the “net employment abroad” indicator which is defined as the balance between the employment abroad controlled by domestic MNE (Figure 2) and the domestic employment controlled by foreign MNE (Table 2). A positive “net employer abroad” is then a country where the domestically-controlled MNE groups employ more people abroad than foreign-controlled MNE groups employ domestically.”

Figure 4Germany and France were the most prominent *“net employers abroad”* in the transport sector among EU countries, with similar figures (138 000 and 127 000 people employed, respectively), followed by Luxembourg (34 000) and Denmark (28 000). At the opposite end of the scale, Poland (-109 000 people employed) recorded the most negative value for this indicator (indicating that it was more controlled by foreign EU MNE groups than it controlled itself), followed by Spain (-37 000), Czechia (-33 000) and Sweden (-32 000).

In relative terms, Luxembourg (137% of its total domestic employment), Denmark and Cyprus (both 18%) surpassed France (8%).



Map 2: Net transport employment abroad by EU controlled MNE groups (domestically vs foreign-controlled MNE groups), 2023 Source: EuroGroups Register and SBS data

The most significant controlling countries outside of the EU and EFTA

Most of the statistical information presented can be determined for countries outside the EU and EFTA territory when they act as country of control. However, this is not possible when they are considered as countries of enterprise (i.e. enterprise resident in countries outside the EU and EFTA territory).

In line with the statistical trends observed for the overall EU-EFTA territory and its Member States, the United States emerges as the most significant controlling country outside of the EU and EFTA, significantly ahead of the United Kingdom. China, including Hong Kong, follows closely, slightly ahead of Japan and the United Arab Emirates.

Figure 5

Source data for tables and graphs

- Employment in foreign-controlled multinational enterprise transport groups: figures and tables

Data sources

This micro data linking exercise focused on linking the available statistical information from following data sources:

- Structural business statistics (SBS);
- the National Statistical Business Registers (NSBR);
- the EuroGroups Register (EGR)

The **Structural Business Statistics** describe the detailed structure, economic activity, and performance of businesses over time. The SBS data collection has very good coverage in terms of size class of enterprises and their economic activity. Thus, this source provides the most comprehensive picture of the European economy, both at country and EU level.

The **National Statistical Business Registers** are the registers of businesses at national level, of which a common core is harmonised pursuant to Regulation (EU) 2019/2152 as a basis for the preparation and coordination of surveys and as a source of information for the statistical analysis of the business population and its demography, for the use of administrative data, and for the identification and construction of statistical units.

The **EuroGroups register** is the source of the MNE groups data. It produces data in yearly cycles and covers microdata on the MNE groups and their consisting enterprises and legal units. It serves statistical purposes only. Access to EGR data is restricted to national statistical institutes and national central banks that produce official statistics in the EU Member States and EFTA countries. The EGR aims to register all MNE groups that have enterprises in EU Member States or EFTA countries, including European and non-European MNE groups.

The data in this article covers the EU countries and the EFTA countries .

Context

Globalisation and the increasing complexity of multinational enterprise group activities means it is difficult to produce business statistics and macroeconomic statistics and correctly and consistently reflect MNE group activities in European statistics. To better analyse cross-border transactions of multinational enterprise groups and correctly record them in statistical business registers, statisticians in the European Statistical System (ESS) and European System of Central Banks (ESCB) need to be able to observe the complete and correct economic structures of multinational enterprise groups.

View this article online at
https://ec.europa.eu/eurostat/statistics-explained/index.php/Employment in foreign-controlled multinational enterprise transport groups

Explore further

Other articles

- Structure of multinational enterprise groups in the EU
- Employment in large-scale multinational enterprise groups
- SMEs and large enterprises - performance by group status
- Structural business statistics overview

Database

- Statistical business registers (SBR)
- Structural business statistics (SBS)

Thematic section

- Transport
- Statistical business registers (SBR)
- Structural business statistics (SBS)
- Statistics under development

Methodology

- Multinational enterprise groups methodology
- Business registers Recommendations manual
- European business statistics compilers' manual for EuroGroups register (EGR)
- EuroGroups Register metadata
- Structural business statistics metadata

Legislation

- Regulation (EEC) No 696/1993 of 15 March 1993 on the statistical units for the observation and analysis of the production system in the Community (Summary)
- Regulation (EU) 2019/2152 of the European Parliament and of the Council of 27 November 2019 on European business statistics, repealing 10 legal acts in the field of business statistics
- Implementing Regulation (EU) 2020/1197 of 30 July 2020 laying down technical specifications and arrangements pursuant to Regulation (EU) 2019/2152 of the European Parliament and of the Council on European business statistics repealing 10 legal acts in the field of business statistics