Road freight transport statistics - cabotage

Statistics Explained

Data extracted in October 2023. Planned article update: November 2024.

" Cabotage accounted for 4.5 % of national road freight transport for hire and reward in the EU in 2022, a decrease of 0.4 percentage points compared with 2021. "

- " More than half of the cabotage in the EU in 2022 was performed in Germany (51.7 %). "
- " Polish hauliers performed 43.4 % of all EU cabotage in 2022. "

This article presents the road freight cabotage transport in the European Union (EU) up to and including 2022. The trends in cabotage are presented both from the perspective of the hauliers performing cabotage in other countries, and from the perspective of the countries where this cabotage takes place. Cabotage is defined as freight transport carried out in one country by hauliers registered in another country. As national transport markets within the EU are not yet fully liberalised, the level of cabotage (together with cross-trade, i.e. transport between two countries that are carried out by hauliers from a third country), may be seen as a sign of market integration. This article, together with the articles 'Road freight transport statistics', 'Road freight transport by vehicle characteristics', 'Road freight transport by type of goods' and 'Road freight transport by journey characteristics' present a complete overview of road freight transport in Europe.

Road freight cabotage transport decreased in 2022

From the perspective of a reporting country and its hauliers, cabotage is considered as international transport as it takes place on the territory of another country. From the perspective of the country in which the transport takes place, it could be considered as national transport for hire and reward since goods are transported by foreign trucks from one location to another within the country.

As road cabotage transport represents only a small part of road freight transport for hire and reward in the national territory and as data are collected on the basis of sample surveys, the accuracy of data on cabotage is generally lower than the accuracy of other transport variables. The percentage standard error of cabotage transport varies significantly from country to country, both in tonne-kilometres (tkm) and in tonnes.

Figure 1 shows the road freight cabotage transport in the EU in terms of million tonne-kilometres, thousand tonnes and million vehicle-kilometres (vkm), as indices based on 2018=100. Since 2018, cabotage transport has grown continuously and with similar trends for the three units, except for a decline for all three indices in 2022.

Cabotage transport measured in million tonne-kilometres and million vehicle-kilometres reached in 2022 an index value of 19 % above the 2018 figures, while the transport measured in thousand tonnes increased by 16 %.

Road freight cabotage transport, EU, 2018-2022

(index 2018=100)

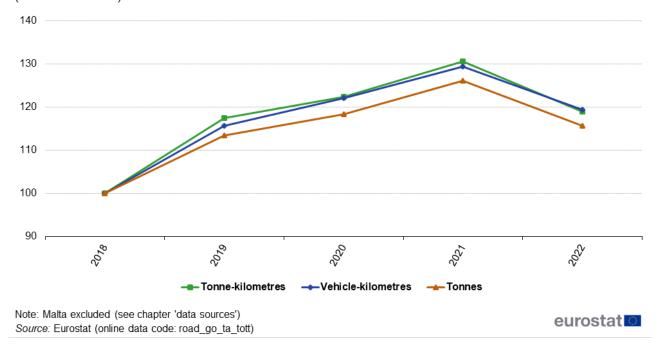


Figure 1: Road freight cabotage transport, EU, 2018-2022 (2018=100) Source: Eurostat (road go ta tott)

Cabotage accounted for 4.5 % of national road freight tonne-kilometres for hire and reward in the EU in 2022

The 'cabotage penetration rate for hire and reward transport' is the main indicator used to assess the extent of cabotage within the national transport markets in the EU . It is defined as the share of cabotage transport in the total national transport of a country (sum of national transport for hire and reward and cabotage transport). Thus, it does not consider any transport that companies do on their own account, using their own trucks and lorries.

The cabotage penetration rate in the EU decreased from 4.9 % in 2021 to 4.5 % in 2022 (see Figure 2).

In 2022, the highest cabotage penetration rate among the EU Member States was recorded in Luxembourg with 16.4 %, far ahead of Austria (10.0 %), Germany (9.6 %) and Belgium (9.0 %). Together with France (7.6 %), these were the only Member States having a cabotage penetration of more than 7 % in the period 2021-2022. The cabotage penetration grew considerably in Estonia: in 2022, at 4.5 %, it was 2.4 percentage points (pp) higher than in 2021.

In stark contrast, Lithuania recorded a decrease in the cabotage penetration rate in its national transport market, from 4.9 % in 2021 to 4.0 % in 2022, this being the highest decrease recorded in 2022. Poland, which is one of the major road transport providers in the EU, recorded a cabotage penetration rate of 0.1 % in 2021 and 0.2 % in 2022. Ireland, Finland, Bulgaria, Romania, Croatia, Latvia and Hun-

gary also recorded cabotage penetration of less than 1 % in their national transport markets in the period 2021-2022.

Cabotage, by country where it takes place, 2021 and 2022

(% share of transport for hire and reward in the national territory, in tonne-kilometres)

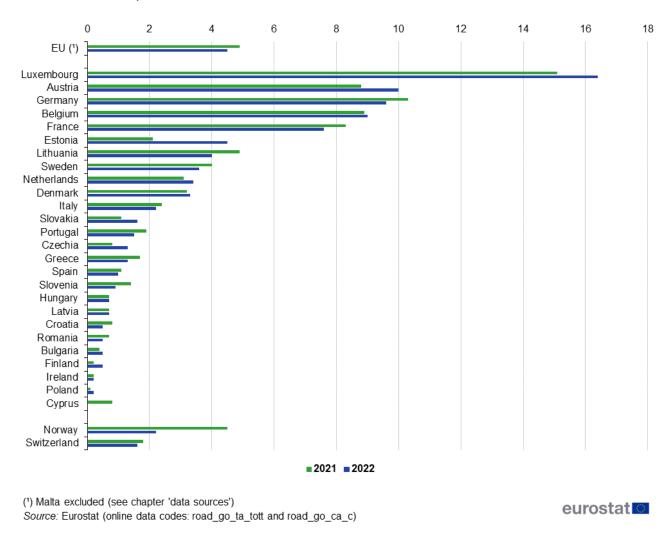


Figure 2: Cabotage, by country where it takes place, 2021 and 2022 (% share of transport for hire and reward in the national territory, in tonne-kilometres) Source: Eurostat (road_go_ta_tott), (road_go_ca_c)

In terms of transport performance measured in tonne-kilometres, cabotage in the EU has been increasing almost continuously since 2018, with only a small fall in 2022, reaching 52.3 billion tonne-kilometres in 2021 from 40.3 billion tonne-kilometres in 2018, and decreasing to 48.2 billion tonne-kilometres in 2022 (see Table 1). Germany remained the country with the highest level of cabotage performance in its national transport market, rising from almost 19.1 billion tonne-kilometres in 2018 to 27.2 billion in 2021, followed by a decrease to 24.9 billion in 2022. France, with the second highest level of cabotage performance, grew from 11.0 billion tonne-kilometres in 2018 to 12.9 billion in 2021, dropping to 11.5 billion tonne-kilometres in 2022. The level of cabotage performance in other Member States' territories was much smaller, with Italy growing from 1.8 billion tonne-kilometres in 2018 to 3.0 billion in 2021, decreasing to 2.8 billion tonne-kilometres in 2022; while Belgium and Spain recorded both 1.6 billion tonne-kilometres in 2018 and 1.7 billion tonne-kilometres in 2022, their highest peak being in 2021 (1.7 billion tonne-kilometres and 2.0 billion tonne-kilometres, respectively). For all other Member States, the cabotage performance was below 2 billion tonne-kilometres for the period 2018-2022.

Cabotage, by country where it takes place, 2018-2022

(million tonne-kilometres)

	2018	2019	2020	2021	2022
EU	40 291	47 145	49 289	52 309	48 206
Belgium	1 602	1 691	1 636	1 729	1 669
Bulgaria	9	14	16	21	25
Czechia	199	286	275	186	318
Denmark	416	341	467	370	370
Germany	19 147	22 944	25 646	27 210	24 929
Estonia	43	32	61	34	71
Ireland	191	214	17	15	12
Greece	98	100	118	186	138
Spain	1 593	2 110	1 784	1 988	1 664
France	10 973	12 294	12 283	12 937	11 544
Croatia	17	12	21	26	16
ltaly	1 770	2 296	2 322	3 018	2 794
Cyprus	0	0	0	3	0
Latvia	37	24	10	23	23
Lithuania	133	94	38	145	99
Luxembourg	14	19	26	26	22
Hungary	79	118	74	85	80
Malta (¹)	-	-	-	-	-
Netherlands	803	1 096	1 162	955	1 028
Austria	1 048	1 018	1 140	1 102	1 237
Poland	130	144	148	130	176
Portugal	115	119	103	128	113
Romania	64	79	33	82	64
Slovenia	33	30	18	26	16
Slovakia	99	136	63	58	83
Finland	97	112	94	60	127
Sweden	1 578	1 822	1 735	1 766	1 588
Norway	623	643	547	813	428
Switzerland	81	141	101	134	125

^(:) Not available

Source: Eurostat (online data code: road go ca c)



Table 1: Cabotage, by country where it takes place, 2018-2022 (million tonne-kilometres) Source: Eurostat (road_go_ca_c)

Cabotage is not always performed by hauliers from neighbouring countries

Table 2 shows in which countries the top five cabotage performers, i.e., Poland, Lithuania, Romania, Spain and the Netherlands, mainly carry out cabotage transport (in tonne-kilometres). Until a few years ago, most cabotage transport was carried out in neighbouring countries. This has changed in recent years, in particular for hauliers from Poland, Lithuania and Romania.

⁽¹⁾ Data not available (see chapter 'data sources')

Hauliers from Poland continued to carry out by far the largest share of cabotage transport in the EU. In 2021, Poland accounted for 45.2 % of freight cabotage for hire and reward in the EU, falling to 43.4 % in 2022 (see Figure 3). About three quarters of the cabotage performed by Polish hauliers in the other EU Member States takes place in Germany: in 2021, Germany accounted for 73.4 % of Polish cabotage performance, increasing to 76.4 % in 2022. Polish hauliers also carried out some cabotage in France, Sweden and Italy, although to a lesser degree. Cabotage in France represented 13.0 % of total Polish cabotage in 2021 and 10.0 % in 2022, with Italy being the third largest with 2.2 % in 2021, while Sweden took over this place in 2022 with 3.3 %.

Lithuania was the second largest provider of cabotage transport, with 11.6 % of the total EU cabotage in 2021 and 11.3 % in 2022. Lithuania performed most of its cabotage in countries with which it had no land borders. Just over 40 % was performed in France (41.8 % in 2021, 41.1 % in 2022), with somewhat less being performed in Germany (31.6 % and 33.7 % respectively), and with Italy being in the third place (7.5 % and 6.4 %, respectively).

Romania was the third largest provider of cabotage transport, with 5.8 % in 2021 and 5.7 % in 2022. The same two transport markets, Germany and France, were also the main countries for cabotage by Romanian hauliers. In both 2021 and 2022, Germany had the highest share at 32.7 % and 32.5 %, respectively, with France following at 22.2 % and 24.0 % in these two years.

Spain was the fourth largest provider of cabotage transport, with 5.7 % in 2021 and 5.3 % in 2022, while the Netherlands had lower shares, with 3.8 % in 2021 and 3.6 % in 2022. In contrast, for hauliers from Spain and the Netherlands, their neighbouring countries were the main markets for cabotage. For Spanish hauliers, France accounted for 87 % of all cabotage in both 2021 and 2022. For Dutch hauliers, more than half (57.8 % in 2021; 52.8 % in 2022)

of their total cabotage was performed in Germany, and around a quarter in Belgium (24.9 % in 2021; 27.0 % in 2022).

Top five cabotage performing countries and the countries in which they carry out cabotage, 2021 and 2022

(% share in tonne-kilometres)

Rank	Country which performs cabotage	Million tonne-kilometres	Top three countries in which cabotage takes place	Share (%)
		2022		
1	Poland	21 751	Germany	76.4
			France	10.0
			Sweden	3.3
		5 674	France	41.1
2	Lithuania		Germany	33.7
			Italy	6.4
		2 874	Germany	32.5
3	Romania		France	24.0
			Italy	11.4
4		2 655	France	87.0
	Spain		Germany	2.7
			Portugal	3.6
5	Netherlands	1 796	Germany	52.8
			Belgium	27.0
			France	11.4
		2021		
	Poland	24 882	Germany	73.4
1			France	13.0
			Italy	2.2
	Lithuania	6 377	France	41.8
2			Germany	31.6
_			Italy	7.5
3		3 183	Germany	32.7
	Romania		France	22.2
			Italy	12.5
4	Spain	3 156	France	87.0
			Portugal	3.9
			Germany	3.5
	Notherlande	2.085	Germany	57.8
5			<u> </u>	
	Netherlands	2 085	Belgium	24.9
			France	8.3

Source: Eurostat (online data code: road_go_ca_hac)



Table 2: Top five cabotage performing countries and the countries in which they carry out cabotage, 2021 and 2022 (% share in tonne-kilometres) Source: Eurostat (road_go_ca_hac)

Cabotage in the EU, performed by hauliers from reporting countries, 2021 and 2022

(% share in total EU cabotage, in tonne-kilometres)

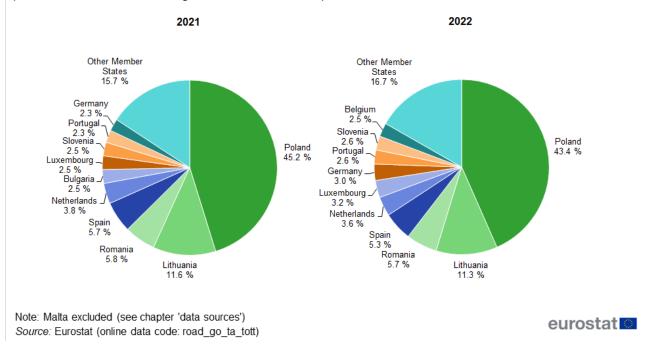


Figure 3: Cabotage in the EU, performed by hauliers from reporting countries, 2021 and 2022 (% share in total EU cabotage, in tonne-kilometres) Source: Eurostat (road go ta tott)

Half of the EU cabotage transport is carried out in Germany

In 2021, 52.0 % of the cabotage transport in the EU (in tonne-kilometres) was performed in the German national territory, falling to 51.7 % in 2022. Approximately one quarter of the cabotage transport in the EU was carried out in France, with 24.7 % in 2021, decreasing to 23.9 % in 2022. (see Figure 4).

Cabotage in the EU, by country in which it takes place, 2021 and 2022

(% share in total EU cabotage, in tonne-kilometres)

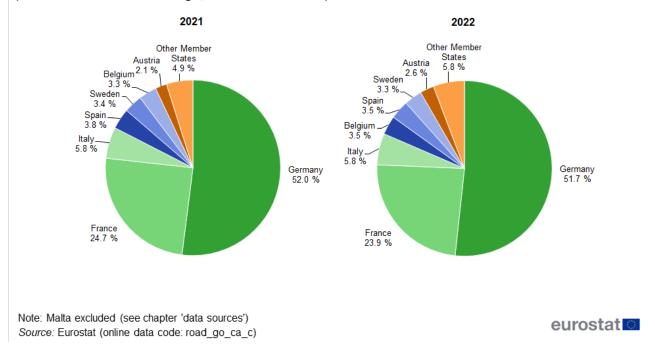


Figure 4: Cabotage in the EU, by country in which it takes place, 2021 and 2022 (% share in total EU cabotage, in tonne-kilometres) Source: Eurostat (road go ca c)

Table 3 shows the five countries where the highest cabotage in the EU was performed (in tonne-kilometres) and the nationality of the three hauliers that performed the largest parts of this cabotage.

As mentioned, the highest number of cabotage tonne-kilometres was performed in Germany in both 2021 and 2022. Polish hauliers performed two thirds of all cabotage in Germany in both years, with 67.2 % and 66.8 %, respectively. Lithuania was the second largest cabotage provider, but with far lower shares: 7.4 % in 2021 and 7.7 % in 2022.

France recorded the second highest volume of cabotage, measured in tonne-kilometres. The three largest cabotage performers in France – Poland, Spain and Lithuania – switched positions from 2021 to 2022: in 2021, Poland accounted for the highest share (24.9 %), ahead of Spain (21.2 %) and Lithuania (20.6 %); while in 2022, Lithuania performed the highest share (20.2 %), ahead of Spain (20.0 %) and Poland (18.8 %).

For cabotage in Italy, Polish hauliers retained the highest share in 2021 and 2022, with 18.1 % and 17.3 %, respectively. Lithuania had the second highest share, with 15.9 % in 2021 and 13.0 % in 2022, followed by Romania with 13.2 % and 11.8 %, respectively.

Spain fell from the fourth place in the top five countries with the most cabotage performed in 2021 to the fifth place in 2022, while Belgium rose to the fourth place in 2022 being outside of the top five in 2021. In Spain, Portugal accounted for more than one third of the cabotage in 2021 (38.1 %), while it performed half of all cabotage in 2022 (52.2 %). In Belgium, Luxembourg performed one third of the cabotage in 2022 (33.3 %) closely followed by the Netherlands (29.0 %). In Sweden, in 2021, Polish hauliers accounted for 29.7 % of all cabotage.

Top five countries with most cabotage performed and the main countries performing it, 2021 and 2022

(% share in tonne-kilometres)

Rank	Country in which cabotage takes place	Million tonne-kilometres	Top three countries performing cabotage	Share (%)
		2022		
1		24 878	Poland	66.8
	Germany		Lithuania	7.7
			Netherlands	3.8
2	8 8 8 8 8	11 535	Lithuania	20.2
	France		Spain	20.0
			Poland	18.8
3			Poland	17.3
	ltaly	2 792	Lithuania	13.0
			Romania	11.8
4		1 668	Luxembourg	33.3
	Belgium		Netherlands	29.0
			Poland	9.4
5	Spain	1 596	Portugal	52.2
			Romania	11.1
			Bulgaria	8.0
		2021		
1	Germany	27 186	Poland	67.2
			Lithuania	7.4
			Netherlands	4.4
2	France		Poland	24.9
		12 934	Spain	21.2
			Lithuania	20.6
3	ltaly		Poland	18.1
		3 017	Lithuania	15.9
			Romania	13.2
4	Spain	1 977	Portugal	38.1
			Romania	14.9
			Poland	13.9
		1 755	Poland	29.7
5	Sweden		Latvia	14.9
			Lithuania	14.0

Source: Eurostat (online data code: road_go_ca_hac)



Highest relative growth in cabotage by Czech, French and Croatian hauliers since 2018

From 2018 to 2022, cabotage performance grew in 14 of the 25 Member States for which data are available. The highest average annual growth rates in cabotage performed were observed for Czechia (+18.8 %), France (+13.8 %) and Croatia (+12.5 %), ahead of Lithuania (+7.9 %) and Ireland (+6.8 %).

In contrast, the highest average falls in the period 2018-2022 were recorded for Estonia (-12.9 %), Denmark (-6.0 %), Slovakia (-5.5 %), Romania (-5.1 %) and Sweden (-4.1 %) (see Table 4).

For six Member States, in 2022, the cabotage activity reached its lowest level since 2018: Estonia, Spain Latvia, the Netherlands, Romania and Slovakia. The highest increases in cabotage transport between 2018 and 2022 were recorded by Poland (+5.1 billion tonne-kilometres), Lithuania (+1.8 billion tonne-kilometres) and Czechia (+0.6 billion tonne-kilometres). At the other end of the scale, the highest decreases were recorded by Romania, (-0.9 billion tonne-kilometres) and Slovakia (-0.3 billion tonne-kilometres).

Cabotage performance by haulier's country of registration, 2018-2022

(million tonne-kilometres)

	2018	2019	2020	2021	2022	Growth rate 2021-2022 (%)	Average annual growth rate 2018-2022 (%)
EU	42 121	49 489	51 573	55 031	50 106	-8.9	3.5
Belgium	962	1 377	1 183	1 048	1 260	20.2	5.5
Bulgaria	1 018	1 173	1 386	1 402	1 192	-15.0	3.2
Czechia	464	512	995	1 118	1 098	-1.8	18.8
Denmark	176	171	126	99	129	30.3	-6.0
Germany	1 532	1 654	1 306	1 245	1 510	21.3	-0.3
Estonia	390	283	337	346	196	-43.4	-12.9
Ireland	243	326	308	346	337	-2.6	6.8
Greece	4	54	30	50	47	-6.0	-
Spain	2 719	2 933	2 742	3 156	2 655	-15.9	-0.5
France	315	361	559	626	601	-4.0	13.8
Croatia	186	261	298	295	335	13.6	12.5
Italy	597	522	665	683	826	20.9	6.7
Cyprus	:	:	:	:	:	-	-
Latvia	921	1 068	848	1 016	775	-23.7	-3.4
Lithuania	3 885	5 110	5 731	6 377	5 674	-11.0	7.9
Luxembourg	1 206	1 368	1 209	1 388	1 594	14.8	5.7
Hungary	1 069	905	894	878	987	12.4	-1.6
Malta (1)	-	-	-	-	-	-	-
Netherlands	1 951	1 939	1 923	2 085	1 796	-13.9	-1.6
Austria	549	513	725	742	685	-7.7	4.5
Poland	16 637	20 985	23 286	24 882	21 751	-12.6	5.5
Portugal	1 112	1 094	981	1 267	1 306	3.1	3.3
Romania	3 725	4 083	3 404	3 183	2 874	-9.7	-5.1
Slovenia	991	1 263	1 303	1 383	1 300	-6.0	5.6
Slovakia	1 263	1 149	1 094	1 066	952	-10.7	-5.5
Finland	122	272	206	259	158	-39.0	5.3
Sweden	84	113	34	91	68	-25.3	-4.1
Norway	7	26	11	17	13	-23.5	13.2
Switzerland	199	147	180	167	202	21.0	0.3

^(:) Not available

Source: Eurostat (online data code: road_go_ta_tott)



Table 4: Cabotage performance by haulier's country of registration, 2018-2022 (million tonne-kilometres) Source: Eurostat (road_go_ta_tott)

Polish hauliers carried by far the highest share of tonnes in cabotage transport

The trend in volume (in tonnes) of goods transported in cabotage was similar to the trends in tonne-kilometres. Polish hauliers carried by far the largest volume of goods in cabotage in 2022, followed by Dutch hauliers (see

⁽⁻⁾ Not applicable

⁽¹⁾ Data not available (see chapter 'data sources')

Figure 5). The highest relative rise between 2021 and 2022 was registered by Danish hauliers (+55 %) and Italian hauliers (+42 %), although Denmark transported low volumes in absolute terms.

At the other end of the scale, Greece (-93 %) and Finland (-71 %) recorded the highest decreases from 2021 to 2022.

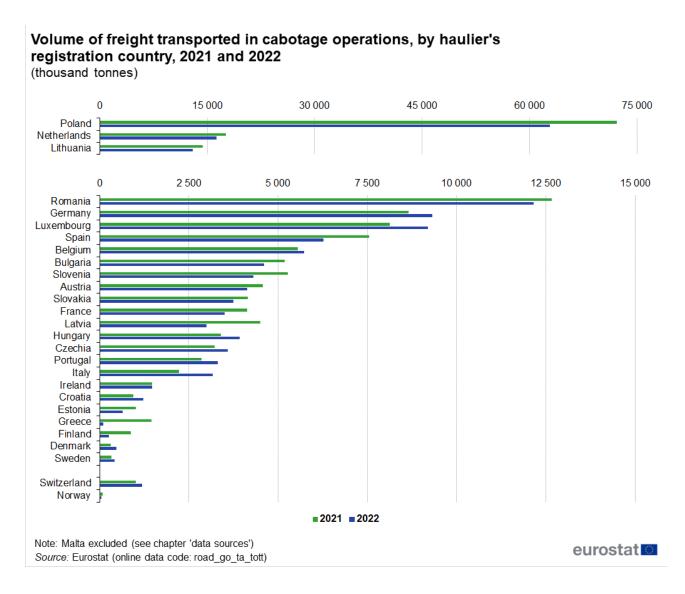


Figure 5: Volume of freight transported in cabotage operations, by haulier's registration country, 2021 and 2022 (thousand tonnes) Source: Eurostat (road_go_ta_tott)

Source data for tables and graphs

· Road freight transport - cabotage

Context

Data presented in this publication were collected in the framework of Regulation (EU) No 70/2012 on statistical returns in respect of the carriage of goods by road (recast). These data are based on sample surveys carried out in the reporting countries, i.e. the EU Member States, Norway, Switzerland and Montenegro, and record the freight transport undertaken by road 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 microdata referring to vehicles and their linked journeys, providing detailed information on goods transported. At the European level, common aggregation procedures that might diverge from national practices

have been used. Differences might therefore occur between the figures in this publication and national values. For the distinction between national and international transport, journey related information is used at European level, which might cause differences in corresponding values from those countries that are using goods-related information for these statistics.

Country specific notes

Croatia: While Croatia had no obligation prior to accession in 2013, it started reporting data for the reference year 2008.

Malta: Regulation (EU) No 70/2012 does not apply to Malta, as long as the number of Maltese-registered goods road transport vehicles licensed to engage in international transport does not exceed 400 vehicles.

Finland: National and international surveys have been harmonised and follow a common methodology from Q1 2011 onwards, leading to a break in time series in 2011.

Sweden: A break in series was produced in 2014 following a change in methodology. On the basis of a specific survey, Sweden corrected the European road freight survey results for trucks participating in the sample which were not in use over the surveyed period.

Methodological notes

EU totals calculated in this publication refer to road freight transport reported by the EU Member States, excluding Malta which is currently exempt from reporting road freight statistics.

Total transport

Total transport includes national transport, international transport of goods loaded in the reporting countries, international transport of goods unloaded in the reporting countries, cross-trade and cabotage

Cabotage

Definition and history: Cabotage is declared by Member States for hauliers registered in their country that performed transport on the national territory of another country. From the point of view of the reporting country, it is considered as international transport, from the point of view of the movements of goods, it could be considered as national transport.

With the aim of increasing transport efficiency and reducing the number of empty journeys, cabotage transport was gradually introduced in 1990 through authorisation quotas (quantitative restrictions) and further liberalised in 1998 in the 15 EU Member States at that time (hauliers are allowed up to three cabotage operations within 7 days following an incoming international carriage). The cabotage regime was extended to the EFTA states (except Switzerland) following the creation of the EEA (European Economic Area). Cabotage between the EU (referring to the prior composition of 15 Member States) and the Member States that joined the EU in 2004 was liberalised in May 2009 and in January 2012 for Bulgaria and Romania. Cabotage for Croatian hauliers is allowed in some EU Member States since July 2015 and was then extended to all Member States.

Cabotage penetration rate: Share of cabotage transport in total national transport, where total national transport is the sum of national transport (for hire and reward) and cabotage transport (in that country).

Data reliability: As road cabotage transport represents only a small percentage of total road transport and as data are collected on the basis of sample surveys, the importance of cabotage could sometimes either be over- or underestimated. Percentage standard error (PSE, 95% confidence interval) of cabotage transport is typically 5-40% for tonnes and 5-30% for tonne-kilometres. Furthermore, variability in cabotage transport performance often occurs due to 'haulage contracts' that have a limited validity. A haulier might thus perform cabotage transport operations in one year and lose this market to a transport operator registered in a different country the next year.

Data availability: The figures presented in this publication have been extracted from Eurostat 's free dissemination database and reflect the state of data availability in October 2023.

In this article:

- 1 billion = 1 000 000 000
- "- "not applicable
- ": "not available

Other articles

- · All articles on freight transport
- · Road freight transport statistics
- · Road freight transport by journey characteristics
- · Road freight transport by vehicle characteristics
- · Road freight transport by type of goods

Main tables

· Transport , see:

Road transport (t_road)

Database

• Transport, see:

Road transport (road)

Road freight transport measurement (road_go)

Dedicated section

Transport

Publications

- Key figures on European transport 2022 edition Statistical book
- Eurostat regional yearbook 2022 edition Statistical book
- Energy, transport and environment statistics 2020 edition Statistical book

Methodology

- Road freight transport measurement (ESMS metadata file)
- Glossary for transport statistics 5thedition 2019 Manuals and guidelines
- Methodologies used in road freight transport surveys in Member States, EFTA and candidate countries 2021 edition — Manuals and guidelines
- Road freight transport methodology Revised edition, August 2017 Manuals and guidelines

Legislation

- Regulation (EC) No 70/2012 on statistical returns in respect of the carriage of goods by road (recast)
- Regulation (EC) No 1304/2007 of 7 November 2007 amending Directive 95/64, Regulation (EC) No 1172/98, Regulations (EC) No 91/2003 and (EC) No 1365/2006 with respect to the establishment of NST 2007 as the unique classification for transported goods in certain transport modes
- A wider European legislative framework for international road freight transport is presented by Regulation (EC) No 1072/2009 of the European Parliament and of the Council of 21 October 2009 on common rules for access to the international road haulage market
- Commission Regulation (EC) No 202/2010 amending Regulation (EC) No 6/2003 concerning the dissemination of statistics on the carriage of goods by road