

2023 European RFT Ranking

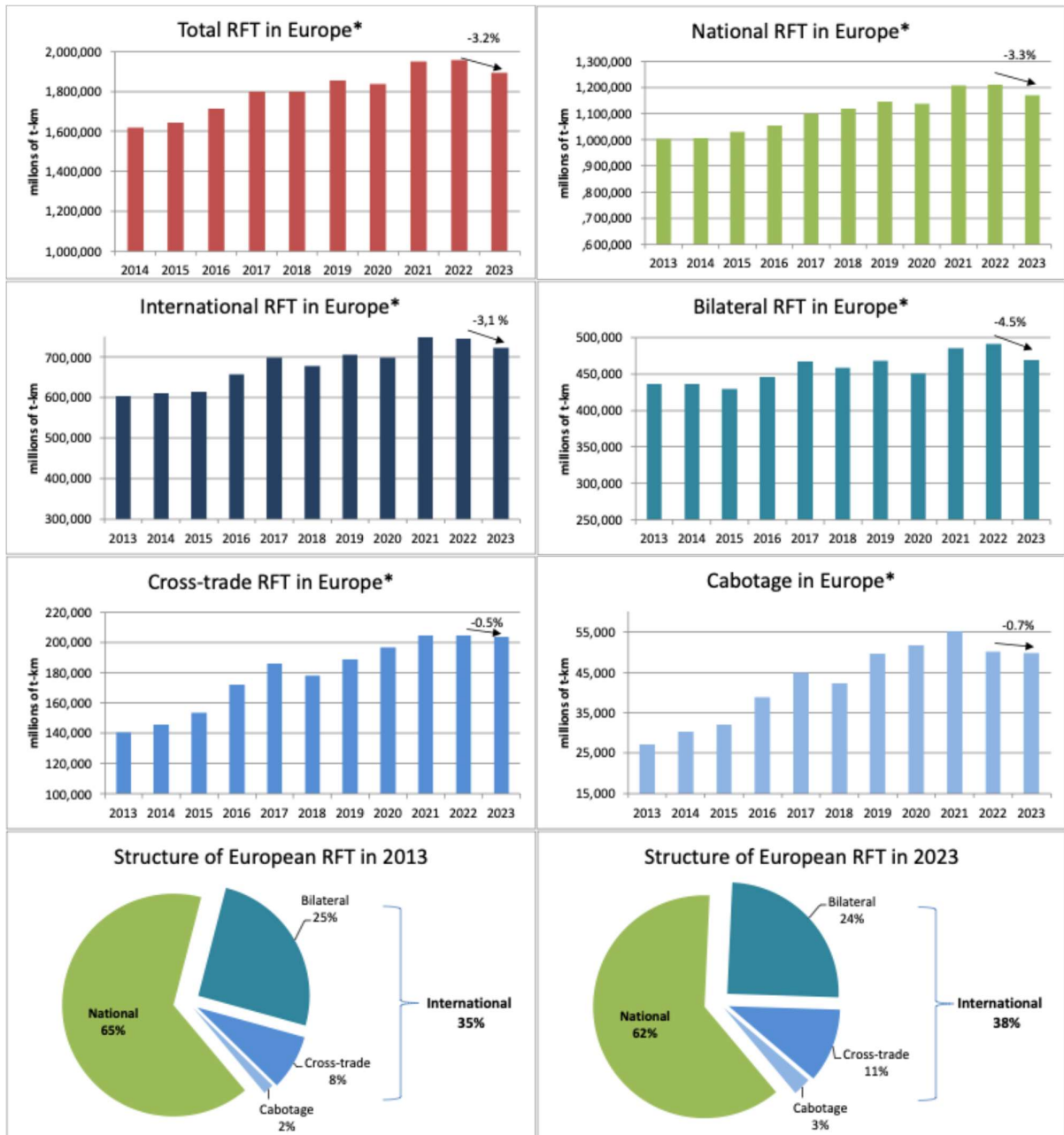
End of the Post-Covid Rebound

The strong recovery in European RFT observed after the COVID-19 period appears to be coming to an end. The two main components, domestic and international, are reacting in the same way.

Between 2022 and 2023, the market is down -3.2%. The decline affects all activities and virtually all flags. While domestic and international activities are reacting in the same way overall, it is the bilateral activity in particular that is suffering the most, with a decline of -4.5% in one year.

International activity now accounts for nearly 38% of the total, a share that has been relatively stable for the past 10 years. Cross-trade activity and cabotage are driving international activity slightly upwards, while national activity is losing share, a sign of the growing Europeanization of road freight transport.

RFT ECONOMIC OBSERVATORY



*See definitions on page 8

ALL ROAD FREIGHT TRANSPORT ACTIVITY PER FLAG - 2023						
Rank	Flag holder	Millions of t.km Eurostat data	Influence in the total	% compared to the first flag holder	Development 2023/2022	Ratio t.km/GDP
1	Poland	377,873	20.0%	100%	-1.9%	505
2	Germany	286,408	15.1%	76%	-5.8%	68
3	Spain	263,382	13.9%	70%	-1.3%	176
4	France	169,240	8.9%	45%	-2.4%	60
5	Italy	145,173	7.7%	38%	-3.9%	68
6	Romania	65,249	3.4%	17%	1.4%	201
7	Czechia	64,806	3.4%	17%	-1.5%	204
8	Lithuania	63,101	3.3%	17%	17.3%	855
9	Netherlands	62,571	3.3%	17%	-4.4%	59
10	Sweden	42,383	2.2%	11%	-11.5%	78
11	Hungary	33,353	1.8%	9%	-10.9%	170
12	Bulgaria	33,125	1.7%	8,8%	-5.7%	340
13	Belgium	32,234	1.7%	8,5%	-3.7%	47
14	Finland	28,255	1.5%	7,5%	-7.6%	103
15	Portugal	26,782	1.4%	7,1%	-16.4%	100
16	Slovakia	26,380	1.4%	7,0%	-16.2%	215
17	Austria	25,422	1.3%	6,7%	-5.2%	54
18	Norway	24,408	1.3%	6,5%	-0.1%	50
19	Slovenia	22,528	1.2%	6,0%	-7.3%	382
20	Greece	20,011	1.1%	5,3%	-5.5%	89
21	Denmark	16,406	0.9%	4,3%	8.2%	44
22	Croatia	14,329	0.8%	3,8%	4.9%	184
23	Latvia	13,203	0.7%	3,5%	-9.5%	338
24	Ireland	12,591	0.7%	3,3%	1.8%	25
25	Switzerland	11,888	0.6%	3,1%	-8.5%	14
26	Luxembourg	6,964	0.4%	1,8%	-5.3%	88
27	Estonia	4,194	0.2%	1,1%	-7.6%	110
28	Cyprus	1,023	0.1%	0,3%	7.8%	33
TOTAL		1,893,282	100.0%		-3.2%	103
			Millions of t.km	Influence in the total	Development 2023/2022	
EU 14			1,137,822	60.1%	-4.2%	
NMS except Malta			719,164	38.0%	-1.6%	
EU 27 except Malta			1,856,986	98.1%	-3.2%	

* Indicator serving to compare the economic specialization of the flag

Poland, now the undisputed market leader across all activities, is down -1.9% in 2023, a better result than the European market as a whole, which posted a decline of -3.2%. The ranking shows very little change, except for Lithuania, which posted an exceptional increase of +17%. The country has the highest RFT activity intensity as a percentage of GDP.

Some flags are suffering more than others, particularly Sweden, Hungary, Portugal, and Slovakia. While the final statistics do not indicate a change in methodology, it will take another year to confirm such declines.

In the Top 5, the German flag is the biggest loser, with a -5.8% drop in RFT activity over the past year, while its Western counterparts are holding up slightly better: -1.3% for Spain and -2.4% for France.

DOMESTIC RFT PER FLAG - 2023						
Rank	Flag holder	Millions of t.km Eurostat data	Influence of domestic RFT for the flag	Flag holder influence into domestic total	% compared to the first flag	Development 2023/2022
1	Germany	253,596	88.5%	21.7%	100.0%	-5.6%
2	Spain	178,213	67.7%	15.2%	70.3%	0.1%
3	France	157,313	93.0%	13.4%	62.0%	-2.0%
4	Poland	134,808	35.7%	11.5%	53.2%	-3.7%
5	Italy	128,805	88.7%	11.0%	50.8%	-2.6%
6	Sweden	40,280	95.0%	3.4%	15.9%	-12.0%
7	Netherlands	33,126	52.9%	2.8%	13.1%	-6.5%
8	Czechia	28,633	44.2%	2.4%	11.3%	-6.9%
9	Finland	26,472	93.7%	2.3%	10.4%	-8.7%
10	Norway	22,606	92.6%	1.9%	8.9%	1.3%
11	Romania	22,313	34.2%	1.9%	8.8%	1.5%
12	Belgium	21,525	66.8%	1.8%	8.5%	-2.4%
13	Austria	16,567	65.2%	1.4%	6.5%	-5.7%
14	Greece	14,815	74.0%	1.3%	5.8%	-8.4%
15	Hungary	14,050	42.1%	1.2%	5.5%	0.9%
16	Denmark	13,921	84.9%	1.2%	5.5%	9.1%
17	Ireland	10,448	83.0%	0.9%	4.1%	2.6%
18	Switzerland	10,308	86.7%	0.9%	4.1%	-5.2%
19	Bulgaria	9,902	29.9%	0.8%	3.9%	12.3%
20	Portugal	7,645	28.5%	0.7%	3.0%	-15.6%
21	Slovakia	5,939	22.5%	0.5%	2.3%	-4.3%
22	Croatia	5,169	36.1%	0.4%	2.0%	6.5%
23	Lithuania	4,178	6.6%	0.4%	1.6%	31.3%
24	Latvia	4,058	30.7%	0.3%	1.6%	1.7%
25	Slovenia	3,097	13.7%	0.3%	1.2%	20.6%
26	Estonia	1,537	36.6%	0.1%	0.6%	-14.5%
27	Cyprus	986	96.4%	0.1%	0.4%	6.8%
28	Luxembourg	493	7.1%	0.0%	0.2%	-16.2%
TOTAL		1,170,803	61.8%	100.0%		-3.3%
		Millions of t.km	Influence of domestic into total RFT	Influence in the total domestic	Development 2023/2022	
EU 14		903,219	79.4%	77.1%	-3.7%	
NMS except Malta		234,670	32.6%	20.0%	-1.8%	
EU 27 except Malta		1,137,889	61.3%	97.2%	-3.3%	

National activity follows the general trend with a decline of -3.3%. At the top of the ranking, the German leader is down -5.6%, France -2%, Poland -3.7%, while the Spanish sector is stagnating with +0.1% in 2023. Further down the ranking, we can note the very sharp declines of Portugal, Estonia, and Luxembourg.

While most Western flags are declining, Norway is growing for the second consecutive year, +1.3% following the political decisions taken in 2021 to prioritize the national flag. Denmark is making strong progress, +9.1%.

In the East, the Romanian, Hungarian, Bulgarian, Lithuanian, and Slovenian sectors are doing well. Overall, the NMS group is performing better than the EU14. The EU14's share of national activity continues to shrink, to 77.1%, compared to 77.5% in 2022.

INTERNATIONAL RFT PER FLAG - 2023						
Rank	Flag holder	Millions of t.km Eurostat data	Influence of international RFT for the flag	Flag holder influence into inter'nal total	% compared to the first flag	Development 2023/2022
1	Poland	243,065	64.3%	33.6%	100.0%	-0.8%
2	Spain	85,169	32.3%	11.8%	35.0%	-4.0%
3	Lithuania	58,923	93.4%	8.2%	24.2%	16.5%
4	Romania	42,935	65.8%	5.9%	17.7%	1.4%
5	Czechia	36,173	55.8%	5.0%	14.9%	3.3%
6	Germany	32,812	11.5%	4.5%	13.5%	-7.3%
7	Netherlands	29,445	47.1%	4.1%	12.1%	-2.0%
8	Bulgaria	23,223	70.1%	3.2%	9.6%	-11.8%
9	Slovakia	20,440	77.5%	2.8%	8.4%	-19.2%
10	Slovenia	19,431	86.3%	2.7%	8.0%	-10.6%
11	Hungary	19,303	57.9%	2.7%	7.9%	-17.9%
12	Portugal	19,137	71.5%	2.6%	7.9%	-16.7%
13	Italy	16,368	11.3%	2.3%	6.7%	-13.1%
14	France	11,927	7.0%	1.7%	4.9%	-7.0%
15	Belgium	10,709	33.2%	1.5%	4.4%	-6.3%
16	Croatia	9,160	63.9%	1.3%	3.8%	4.0%
17	Latvia	9,145	69.3%	1.3%	3.8%	-13.7%
18	Austria	8,854	34.8%	1.2%	3.6%	-4.4%
19	Luxembourg	6,471	92.9%	0.9%	2.7%	-4.3%
20	Greece	5,196	26.0%	0.7%	2.1%	3.9%
21	Estonia	2,657	63.4%	0.4%	1.1%	-3.1%
22	Denmark	2,485	15.1%	0.3%	1.0%	3.3%
23	Ireland	2,143	17.0%	0.3%	0.9%	-1.8%
24	Sweden	2,103	5.0%	0.3%	0.9%	-0.1%
25	Norway	1,802	7.4%	0.2%	0.7%	-14.3%
26	Finland	1,782	6.3%	0.2%	0.7%	12.4%
27	Switzerland	1,581	13.3%	0.2%	0.7%	-25.4%
28	Cyprus	37	3.6%	0.0%	0.0%	42.3%
TOTAL		722,476	38.2%	100.0%		-3.1%
			Millions of t.km	Influence of domestic into total RFT	Influence in the total domestic	Development 2023/2022
EU 14			234,601	20.6%	32.5%	-6.0%
NMS except Malta			484,492	67.4%	67.1%	-1.5%
EU 27 except Malta			719,093	38.7%	99.5%	-3.0%

The results of international activity by country are more heterogeneous than those of national activity. The NMS sectors, at -1.5%, fared better than their Western partners, at -6%. While the Polish leader lost -0.8%, the Lithuanian RFT industry captured significant market share and confirmed its third place in the ranking thanks to exceptional growth of +16.5%. Still in the top 5, the Romanian and Czech also showed positive signs, with +1.4% and +3.3% respectively.

Among the former international leaders, Spain lost -4% and Germany -7.3%. While international activity still represents a third of overall activity for the Spanish RFT, its share has fallen to 11% for Germany and Italy. This trend is reminiscent of the early 2000s for the French, which fell to 7% in 2023. It should also be noted that some Eastern European countries are particularly affected by the decline in activity. This is the case for Bulgaria, Slovakia, Hungary, Slovenia, and Latvia. In the West, Portugal is down -16.7% and Italy is down -13.1%.

BILATERAL - 2023						
Rank	Flag holder	Millions of t.km Eurostat data	Influence of bilateral for the flag	% compared to the first flag	Flag holder influence into bilateral total	Development 2023/2022
1	Poland	143,326	37.9%	100.0%	30.6%	-1.6%
2	Spain	77,965	29.6%	54.4%	16.6%	-4.5%
3	Germany	28,376	9.9%	19.8%	6.1%	-8.1%
4	Czechia	27,558	42.5%	19.2%	5.9%	-2.8%
5	Netherlands	24,583	39.3%	17.2%	5.2%	-1.7%
6	Romania	23,238	35.6%	16.2%	5.0%	2.3%
7	Italy	14,920	10.3%	10.4%	3.2%	-13.4%
8	Hungary	14,427	43.3%	10.1%	3.1%	-9.9%
9	Slovakia	12,685	48.1%	8.9%	2.7%	-14.4%
10	Portugal	12,566	46.9%	8.8%	2.7%	-15.6%
11	Bulgaria	12,409	37.5%	8.7%	2.6%	-8.0%
12	France	11,143	6.6%	7.8%	2.4%	-6.4%
13	Lithuania	10,878	17.2%	7.6%	2.3%	6.1%
14	Slovenia	9,749	43.3%	6.8%	2.1%	-10.7%
15	Belgium	8,601	26.7%	6.0%	1.8%	-5.5%
16	Austria	6,884	27.1%	4.8%	1.5%	-1.3%
17	Croatia	5,945	41.5%	4.1%	1.3%	3.2%
18	Latvia	5,211	39.5%	3.6%	1.1%	-17.7%
19	Greece	5,129	25.6%	3.6%	1.1%	6.4%
20	Denmark	2,278	13.9%	1.6%	0.5%	5.5%
21	Sweden	1,869	4.4%	1.3%	0.4%	-5.5%
22	Luxembourg	1,836	26.4%	1.3%	0.4%	-8.7%
23	Estonia	1,760	42.0%	1.2%	0.4%	2.3%
24	Norway	1,720	7.0%	1.2%	0.4%	-16.9%
25	Finland	1,358	4.8%	0.9%	0.3%	7.8%
26	Ireland	1,319	10.5%	0.9%	0.3%	-9.3%
27	Switzerland	1,245	10.5%	0.9%	0.3%	-25.3%
28	Cyprus	37	3.7%	0.0%	0.0%	42.3%
		0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL		469,015	24.9%	100.0%	100.0%	-4.5%
		Millions of t.km	Influence in total RFT activity	Influence in the bilateral total	Development 2023/2022	
EU 14		198,827	17.5%	42.4%	-5.9%	
NMS except Malta		267,223	37.2%	57.0%	-3.2%	
EU 27 except Malta		466,050	25.1%	99.4%	-4.4%	

After a slight recovery in 2022, bilateral activity, the main component of international RFT, fell -4.5% in 2023. The top twelve countries in the ranking declined, with the exception of Romania, sometimes very sharply, such as Italy, Slovakia, and Portugal. Against this trend, Lithuania gained 6.1% and Croatia 3.2%.

CROSS-TRADE RFT - 2023						
Rank	Flag holder	Millions of t.km Eurostat data	Influence of cross-trade RFT for the flag	% compared to the first flag	Flag holder influence into cross-trade total	Development 2023/2022
1	Poland	78,049	20.7%	100.0%	38.3%	0.4%
2	Lithuania	41,238	65.4%	52.8%	20.3%	19.0%
3	Romania	16,803	25.8%	21.5%	8.3%	0.2%
4	Bulgaria	9,995	30.2%	12.8%	4.9%	-14.1%
5	Slovenia	8,348	37.1%	10.7%	4.1%	-12.3%
6	Czechia	7,321	11.3%	9.4%	3.6%	30.9%
7	Slovakia	6,817	25.8%	8.7%	3.3%	-28.3%
8	Portugal	5,613	21.0%	7.2%	2.8%	-17.2%
9	Spain	4,627	1.8%	5.9%	2.3%	3.9%
10	Hungary	4,110	12.3%	5.3%	2.0%	-36.9%
11	Latvia	3,289	24.9%	4.2%	1.6%	-5.7%
12	Luxembourg	3,198	45.9%	4.1%	1.6%	1.2%
13	Netherlands	3,083	4.9%	4.0%	1.5%	-5.9%
14	Germany	3,000	1.0%	3.8%	1.5%	0.1%
15	Croatia	2,937	20.5%	3.8%	1.4%	8.3%
16	Austria	1,392	5.5%	1.8%	0.7%	-13.2%
17	Belgium	964	3.0%	1.2%	0.5%	-9.3%
18	Estonia	718	17.1%	0.9%	0.4%	-13.1%
19	Italy	641	0.4%	0.8%	0.3%	-16.8%
20	Ireland	475	3.8%	0.6%	0.2%	22.1%
21	France	311	0.2%	0.4%	0.2%	0.6%
22	Finland	171	0.6%	0.2%	0.1%	2.4%
23	Sweden	133	0.3%	0.2%	0.1%	121.7%
24	Switzerland	119	1.0%	0.2%	0.1%	-52.6%
25	Denmark	105	0.6%	0.1%	0.1%	-11.8%
26	Greece	67	0.3%	0.1%	0.0%	-48.1%
27	Norway	37	0.2%	0.0%	0.0%	94.7%
28	Cyprus	0	0.0%	0.0%	0.0%	0.0%
TOTAL		203,561	1.1%		10.0%	0.0%
			Millions of t.km	Influence in total RFT activity	Influence in the cross-trade total	Development 2023/2022
EU 14			23,780	0.2%	1.2%	-0.6%
NMS except Malta			179,625	2.5%	8.8%	0.0%
EU 27 except Malta			203,405	1.1%	10.0%	0.0%

In 2022, the significant upward trend observed over the past ten years in international cross-trade activity had already come to a halt. In 2023, the reversal was confirmed with a slight decline of -0.5%.

In the Top 5, Poland, Lithuania, and Romania are progressing, while Bulgaria and Slovenia are falling sharply. The Czech flag is also growing very strongly, in contrast to its neighbor Slovakia, where it has moved up to 6th place.

At the bottom of the ranking, absolute activity levels are very low and subject to strong annual fluctuations, making it difficult to analyze changes by flag.

Overall, this activity seems increasingly reserved for the NMS flags, which account for over 88% of it.

CABOTAGE - 2023						
Rank	Flag holder	Millions of t.km Eurostat data	Influence of cabotage for the flag	% compared to the first flag	Flag holder influence into cabotage total	Development 2023/2022
1	Poland	21,690	5.7%	100.0%	43.5%	-0.3%
2	Lithuania	6,807	10.8%	31.4%	13.6%	20.0%
3	Romania	2,894	4.4%	13.3%	5.8%	0.7%
4	Spain	2,577	1.0%	11.9%	5.2%	-2.9%
5	Netherlands	1,779	2.8%	8.2%	3.6%	2.4%
6	Luxembourg	1,437	20.6%	6.6%	2.9%	-9.8%
7	Germany	1,436	0.5%	6.6%	2.9%	-4.9%
8	Slovenia	1,334	5.9%	6.2%	2.7%	2.6%
9	Czechia	1,295	2.0%	6.0%	2.6%	17.9%
10	Belgium	1,144	3.5%	5.3%	2.3%	-9.2%
11	Portugal	,958	3.6%	4.4%	1.9%	-26.6%
12	Slovakia	938	3.6%	4.3%	1.9%	-1.5%
13	Bulgaria	819	2.5%	3.8%	1.6%	-31.3%
14	Italy	808	0.6%	3.7%	1.6%	-2.2%
15	Hungary	767	2.3%	3.5%	1.5%	-22.3%
16	Latvia	646	4.9%	3.0%	1.3%	-16.6%
17	Austria	578	2.3%	2.7%	1.2%	-15.6%
18	France	473	0.3%	2.2%	0.9%	-21.3%
19	Ireland	349	2.8%	1.6%	0.7%	3.6%
20	Croatia	279	1.9%	1.3%	0.6%	-16.7%
21	Finland	253	0.9%	1.2%	0.5%	60.1%
22	Switzerland	217	1.8%	1.0%	0.4%	7.4%
23	Estonia	180	4.3%	0.8%	0.4%	-8.2%
24	Denmark	103	0.6%	0.5%	0.2%	-20.2%
25	Sweden	102	0.2%	0.5%	0.2%	50.0%
26	Norway	45	0.2%	0.2%	0.1%	246.2%
27	Greece	1	0.0%	0.0%	0.0%	-97.9%
28	Cyprus	0	0.0%	0.0%	0.0%	0.0%
TOTAL		49,909	2.6%		100.0%	-0.7%
			Millions of t.km	Influence in total RFT activity	Influence in the cabotage total	Development 2023/2022
EU 14			11,998	1.1%	24.0%	-7.1%
NMS except Malta			37,649	5.2%	75.4%	1.4%
EU 27 except Malta			49,647	2.7%	99.5%	-0.8%

Cabotage is declining for a second consecutive year. Only a few flags at the top of the ranking show significant volume. In the Top 5, Poland and Romania are stagnating, Lithuania is up 20%, Spain is down -2.9%, and the Netherlands is up +2.4%.

Overall, the EU14 is down -7%, while the NMS flags are up +1.4%.

Conclusion

In 2023, European RFT is experiencing a poor year across all types of RFT activity. The overall market trend is downward, with highly diverse trends for both EU14 and NMS flags.

Western flags are experiencing a sharp overall decline in activity, likely linked to the poor economic performance of certain European countries, including Germany, a major generator of freight flows.

In Eastern Europe, the leading Polish market may have reached its limits. Its Lithuanian neighbor seems to be catching up by leaps and bounds: +17.3% growth in 2023. Other flags, particularly those in Central Europe, such as Slovakia, Hungary, and Slovenia, are suffering greatly. The situation still appears to be linked to the war in Ukraine and the poor health of their main economic partner, Germany.

Overall, the NMS flags are declining less than the EU14 flags, and in a rather polarized manner. The figures are heavily influenced by a few countries, which are showing significant downward and upward trends. The statistical results for 2024 will show whether this trend is sustainable.

Definitions

Europe: EU27 - Malta + Norway + Switzerland

UE 27: All Members of the European Union in 2023.

UE 14: The 14 oldest Member States of the European Union, namely Germany, Austria, Belgium, Denmark, Spain, Finland, France, Greece, Ireland, Italy, Luxembourg, the Netherlands, Portugal, and Sweden.

NMS (New Member States): The 13 newest Member States of the European Union joining from 2004 onwards, namely Bulgaria, Cyprus, Croatia, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Czechia, Romania, Slovakia and Slovenia.

Total transport

All road transport of goods operations carried out on the territory of all of "Europe" defined above.

Domestic transport

Transport where loading and unloading points are located in the country of registration of the vehicle carrying out the operation.

International transport

Transport where the country of loading or unloading or the registration of the vehicle carrying out the transport operation is different.

Bilateral transport

International transport carried out by a vehicle registered in the country of loading or unloading.

Cross-trade RFT

International transport carried out by a vehicle neither registered in the loading country nor in the unloading country of the goods.

Cabotage

Transport between two points in the same country carried out by a vehicle registered in another country. When the cabotage activity performed by a flag is carried out abroad, it is therefore classified as international transport. But it competes with the domestic transport (of the other flags).

Source: Eurostat, European RFT database, A2 type with a pathway approach, based on the version available in November 2022, completed by national sources.

With regard to RFT activity in Europe, Eurostat has published two different series, A2 and A3. The results are very close. Any discrepancies are mainly due to domestic transport. The existence of these two series explains why we can sometimes find slightly different results between various publications on the subject.