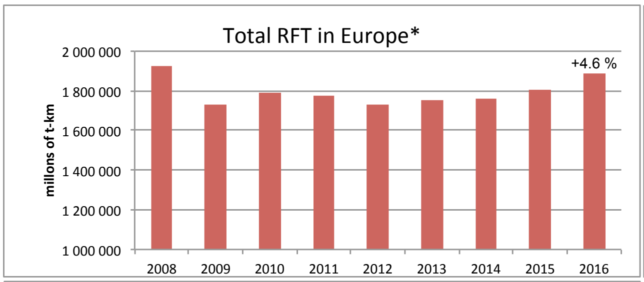
RFT ECONOMIC OBSERVATORY

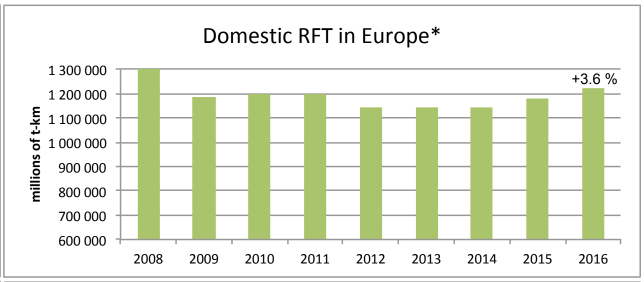
March 2018

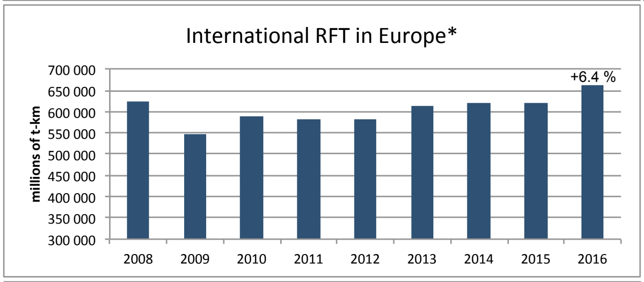
European Road Freight Transport Activity Ranking 2016

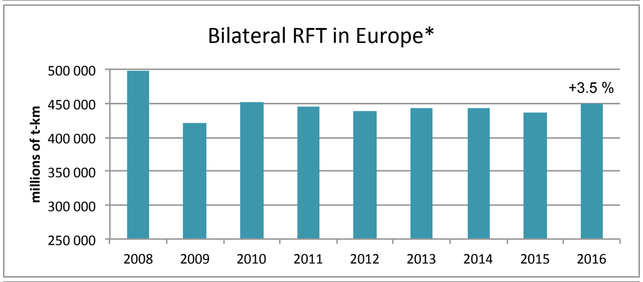
A clear exit from the crisis was already apparent in 2015, with a total growth rate of 2.4%. In 2016, the trend was strengthened: the European road freight transport (RFT) sector doubled the growth of 2015 and achieved one of its best performances since the early 2000s. In addition, growth now affects all activities. The Western flags are benefiting from the development of domestic activity while the Eastern flags have made a breakthrough of 8.6% thanks, in particular, to the good results of international business. Cross-trade RFT stands out with growth of close to 12%, and cabotage has soared by more than 20% in one year. Intra-community trade seems to have a bright future ahead of it.

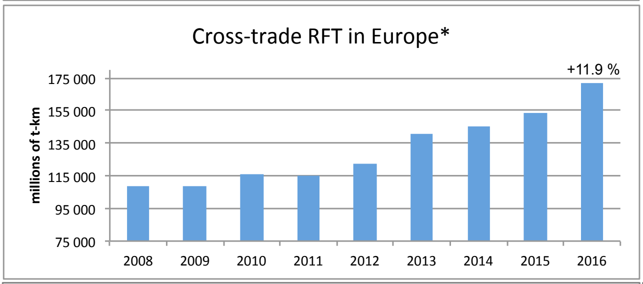
Among Western flags, the United Kingdom is undoubtedly better off than its neighbours. It posted a score of +11%, while Germany stagnated and France posted a timid growth of 1.5% compared to 2015. Italy, the Netherlands and Belgium are falling back. In the East, the results are equally mixed. Poland is imposing its dominance with a growth rate of more than 11% for all its activities, thanks in particular to the exceptional growth of its international business, which is +18% in one year. The Czech Republic fell by -12%, despite growth in its domestic business (+5.7%). It lost more than 22% internationally, presumably to the advantage of its Polish neighbour. Other flags also suffered internationally, such as Hungary and Latvia (-4.3%). The unbridled competition between the Eastern countries, which weighs on companies' prices and margins, doesn't only create winners.

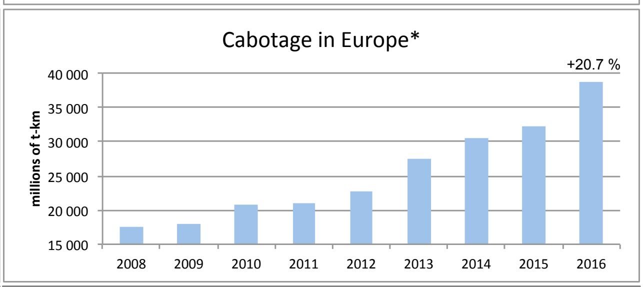


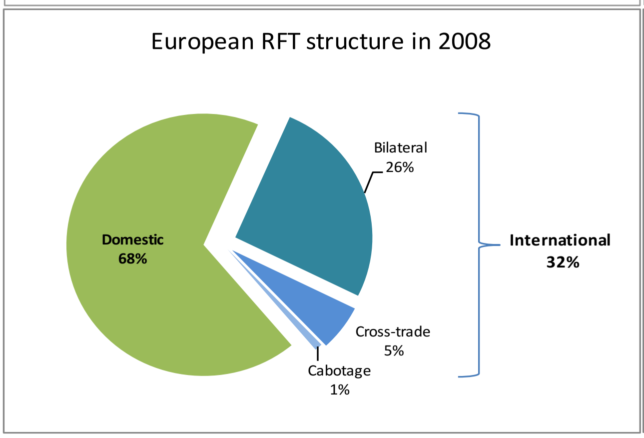


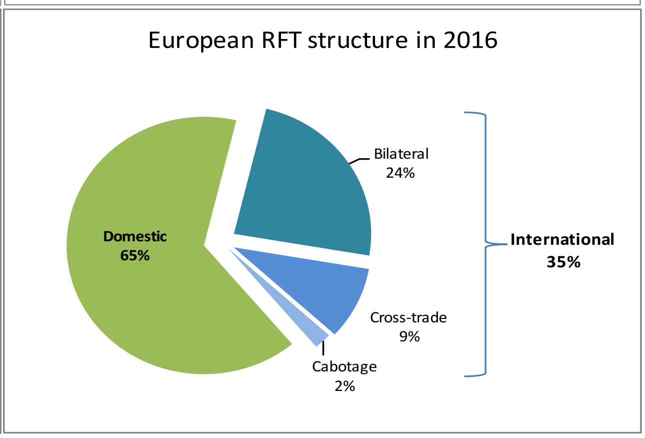












*See definitions on page 8

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ALL ROAD FREIGHT TRANSPORT ACTIVITY PER FLAG - 2016

Rank	Flag holder	Millions of t.km Eurostat data	Influence in the total	% compared to the first flag holder	Development 2016/2015	Ratio t.km/GDP
1	Germany	315,774	16.7%	100%	0.3%	100
2	Poland	290,749	15.4%	92%	11.5%	683
3	Spain	216,997	11.5%	69%	3.6%	194
4	United Kingdom	176,678	9.4%	56%	11.2%	74
5	France	155,843	8.3%	49%	1.5%	70
6	Italy	112,637	6.0%	36%	-3.6%	67
7	Netherlands	67,964	3.6%	22%	-1.4%	97
8	Czech Republic	50,315	2.7%	16%	-12.0%	285
9	Romania	48,176	2.6%	15%	23.5%	284
10	Sweden	42,673	2.3%	14%	2.8%	92
11	Hungaria	40,002	2.1%	13%	4.3%	352
12	Slovakia	36,139	1.9%	11%	7.7%	445
13	Bulgaria	35,409	1.9%	11%	9.6%	736
14	Portugal	34,877	1.8%	11%	9.6%	188
15	Lituania	30,974	1.6%	9.8%	16.9%	801
16	Belgium	30,865	1.6%	9.8%	-2.7%	73
17	Finland	26,846	1.4%	8.5%	9.6%	124
18	Austria	26,138	1.4%	8.2%	7.0%	74
19	Greece	24,560	1.3%	7.8%	24.3%	141
20	Norway	20,932	1.1%	6.6%	-9.5%	62
21	Slovenia	18,707	1.0%	5.9%	4.5%	463
22	Denmark	16,094	0.9%	5.1%	3.8%	58
23	Latvia	14,227	0.8%	4.5%	-3.2%	571
24	Switzerland	12,134	0.6%	3.8%	-2.5%	20
25	Ireland	11,616	0.6%	3.7%	17.3%	42
26	Croatia	11,337	0.6%	3.6%	8.6%	244
27	Luxembourg	9,324	0.5%	3.0%	5.4%	176
28	Estonia	6,716	0.4%	2.1%	7.2%	318
29	Cyprus	703	0.0%	0.2%	24.9%	39
	TOTAL	**1,885,406**	**100.0%**		**4.6%**	**119**

	Millions of t.km	Influence in the total	Development 2016/2015
EU15	1,268,886	67.3%	3.1%
NMS except Malta	583	30.9%	8.6%
EU28 except Malta	1,852,340	98.2%	4.8%

Overall activity increased with a growth rate of 4.6% year-on-year. 22 of the 29 countries listed in the ranking have a positive rate, but growth is far from homogeneous. The Western flags performed well (+3.1%), which, however, paled into insignificance compared to the +8.6% of the flags in Eastern Europe.

For all activities, the top of the ranking has not changed. The TOP 5 is still composed of Germany, the domestic champion, Poland and Spain, the international leaders, the United Kingdom and France whose activity resides almost exclusively on the internal market. The United Kingdom, which had been in front of France in 2015, confirmed its position thanks to an exceptional growth rate of +11.2%, a result often reserved for Eastern flags. The TOP 5 concentrates more than 61% of European activity.

The growth of the Polish and Romanian RFT sectors continues. With +11.5% year-on-year, Poland is approaching the German leader. Similar growth in 2017 would put Poland at the top of the ranking, destroying Germany's historical position as leader. With +23.5% in 2016, Romania has moved in front of Sweden and now occupies 9th place.

DOMESTIC RFT PER FLAG - 2016

Rank	Flag	Millions of t.km Eurostat data	Influence of domestic RFT for the flag holder	Flag holder influence into all domestic RFT activities	% compared to the first flag holder	Development 2016/2015
1	Germany	271,679	86%	22.2%	100%	0.8%
2	United Kingdom	170,304	96%	13.9%	63%	12.2%
3	Spain	144,984	67%	11.8%	53%	5.6%
4	France	144,205	93%	11.8%	53%	2.1%
5	Poland	106,634	37%	8.7%	39%	1.9%
6	Italy	100,282	89%	8.2%	37%	-3.7%
7	Sweden	39,260	92%	3.2%	14%	3.0%
8	Netherlands	34,128	50%	2.8%	13%	6.1%
9	Finland	24,586	92%	2.0%	9.0%	14.7%
10	Czech Republic	22,304	44%	1.8%	8.2%	5.7%
11	Belgium	18,808	61%	1.5%	6.9%	-0.7%
12	Norway	18,507	88%	1.5%	6.8%	-9.6%
13	Austria	16,505	63%	1.3%	6.1%	12.4%
14	Greece	15,191	62%	1.2%	5.6%	1.1%
15	Romania	13,140	27%	1.1%	4.8%	8.9%
16	Denmark	13,037	81%	1.1%	4.8%	4.0%
17	Hungary	11,720	29%	1.0%	4.3%	13.2%
18	Portugal	10,382	30%	0.8%	3.8%	-3.8%
19	Switzerland	10,138	84%	0.8%	3.7%	-2,0%
20	Ireland	9,281	80%	0.8%	3.4%	19.6%
21	Bulgaria	7,324	21%	0.6%	2.7%	2.1%
22	Slovakia	5,697	16%	0.5%	2.1%	8.6%
23	Croatia	3,986	35%	0.3%	1.5%	-1.7%
24	Lituania	2,970	10%	0.2%	1.1%	2.0%
25	Latvia	2,807	20%	0.2%	1.0%	2.0%
26	Slovenia	2,134	11%	0.2%	0.8%	3.1%
27	Estonia	1,792	27%	0.1%	0.7%	17.6%
28	Luxembourg	1,192	13%	0.1%	0.4%	8.1%
29	Cyprus	684	97%	0.1%	0.3%	24.8%
	TOTAL	**1,223,661**	**64.9%**	**100.0%**		**3.6%**

	Millions of t.km	Influence of domestic activity into total RFT activity	Influence in the total	Development 2016/2015
EU15	1,013,824	79.9%	82.9%	3.8%
NMS except Malta	181,192	31.1%	14.8%	3.8%
EU28 except Malta	1,195,016	64.5%	97.7%	3.8%

Growth in domestic activity reached 3.6%, which was perfectly homogeneous between the EU15 and the New Member States. However, national scores are more heterogeneous. Germany is stagnating (+ 0.8%), the United Kingdom is taking off (+ 12.2%), and Spain appears to be healthy with a growth rate of + 5.6% for domestic RFT, thanks to the recovery in the general economic situation. France has lost its 3rd place to its southern neighbour, despite a positive score of +2.1%, in perfect harmony with the growth rate of its economy. Poland, the international leader, is growing very slowly at the domestic level, up by 1.9%. Italy declined by -3.7%.

The structural difference between Eastern and Western Europe is increasing. The share of domestic activity continues to increase for almost all flags in the West, with a peak of 96% for the United Kingdom. In contrast, this share decreases to 37% for Poland, 27% for Romania, 16% for Slovakia or 10% for Lithuania.

Given the size of internal markets and the hyper specialisation of Eastern flags on international markets, the issue of cabotage will arise more intensely in the coming years and will pit the two geographical blocs against each other. It should be noted that this "international" activity, which is soaring, +20% in 2016, directly threatens the domestic activity of large Western flags.

INTERNATIONAL RFT PER FLAG HOLDER - 2016

Rank	Flag holder	Millions of t.km Eurostat data	Influence of international activity for the flag holder	Flag holder influence into all international RFT activities	% compared to the first flag holder	Development 2016/2015
1	Poland	184,115	63%	27.8%	100%	18.0%
2	Spain	72,012	33%	10.9%	39%	-0.2%
3	Germany	44,095	14%	6.7%	24%	-2.3%
4	Romania	35,036	73%	5.3%	19%	30.0%
5	Netherlands	33,836	50%	5.1%	18%	-7.9%
6	Slovakia	30,441	84%	4.6%	17%	7.6%
7	Hungaria	28,281	71%	4.3%	15%	1.0%
8	Bulgaria	28,085	79%	4.2%	15%	11.8%
9	Czech Republic	28,010	56%	4.2%	15%	-22.4%
10	Lituania	28,004	90%	4.2%	15%	18.8%
11	Portugal	24,495	70%	3.7%	13%	16.4%
12	Slovenia	16,573	89%	2.5%	9%	4.6%
13	Italy	12,355	11%	1.9%	6.7%	-2.8%
14	Belgium	12,057	39%	1.8%	6.5%	-5.8%
15	France	11,638	7%	1.8%	6.3%	-5.7%
16	Latvia	11,420	80%	1.7%	6.2%	-4.3%
17	Austria	9,634	37%	1.5%	5.2%	-1.1%
18	Greece	9,368	38%	1.4%	5.1%	97.6%
19	Luxembourg	8,131	87%	1.2%	4.4%	5.0%
20	Croatia	7,351	65%	1.1%	4.0%	15.1%
21	United Kingdom	6,373	4%	1.0%	3.5%	-11.4%
22	Estonia	4,924	73%	0.7%	2.7%	3.9%
23	Sweden	3,413	8%	0.5%	1.9%	0.5%
24	Denmark	3,057	19%	0.5%	1.7%	3.0%
25	Norway	2,425	12%	0.4%	1.3%	-9.3%
26	Ireland	2,335	20%	0.4%	1.3%	9.1%
27	Finland	2,260	8%	0.3%	1.2%	-26.0%
28	Switzerland	1,995	16%	0.3%	1.1%	-4.0%
29	Cyprus	18	3%	0.0%	0.0%	20.0%
	TOTAL	**661,737**	**35.1%**	**100.0%**		**6.4%**

	Millions of t.km	Influence of international activity into total RFT activity	Influence in the total	Development 2016/2015
EU15	255	20.1%	38.5%	0.5%
NMS except Malta	402	68.9%	60.8%	10.8%
EU28 except Malta	657	35.5%	99.3%	6.6%

After a year of stagnation, +0.5% in 2015, total European international activities returned to growth, with a high growth rate of 6.4%. The Western flags take very little advantage from this surge, the benefits of which are mainly shared between Eastern flags.

In the West, the international activity of the Spanish RFT sector shows -0.2% compared with 2015, while Germany recorded a decline of -2.3% and the Netherlands -7.9%. In contrast, Portugal posted a significant increase of 16.4%. Greece doubled its activity in one year. This exceptional result could be explained by a recovery in Greek activity following the fall in labour costs, but also by a revision of the statistical infrastructure.

The progress of the Polish sector, the market leader, is remarkable. With +18% in one year, the country alone captures 28% of international RFT activity in Europe. Romania has an impressive score of +30% and has now risen to 4^{th} place, just behind Germany. The Czech Republic, which lost -22.4%, seems to be no longer able to cope with its low-cost neighbours. Its sector seems to have taken the unfortunate route that Western flags took a decade ago.

The price war is creating its victims, often in the West, but not only. It is destabilising the already very tight RFT market and is creating oligarchic sectors under the guise of the single market. Their economic model relies entirely on low wages, as explained in CNR publications. For the countries concerned, the size of RFT activity compared to national GDP is ten times that seen in the West. For example, the t.km/GDP ratio (see table on page 2) is 683 in Poland, 736 in Bulgaria, 801 in Lithuania, versus 67 in Italy, 70 in France, 97 in the Netherlands or 100 in Germany. This ultra-specialisation and dependence on national economies are currently preventing the catch-up of RFT wages in these countries, all located in the East.

BILATERAL RFT - 2016

Rank	Flag holder	Millions of t.km Eurostat data	% compared to first flag holder	Flag holder influence into all bilateral activities	% compared to total RFT activity of the flag holder	Development 2016/2015
1	Poland	118,106	100%	26%	41%	15.7%
2	Spain	65,594	56%	15%	30%	0.0%
3	Germany	38,980	33%	9%	12%	-2.5%
4	Netherlands	27,838	24%	6%	41%	-6.0%
5	Czech Republic	22,017	19%	5%	44%	-19.3%
6	Portugal	16,694	14%	4%	48%	14.0%
7	Romania	16,133	14%	4%	33%	10.7%
8	Hungaria	15,426	13%	3%	39%	2.2%
9	Slovakia	15,115	13%	3%	42%	7.4%
10	Italy	11,553	10%	3%	10%	-4.6%
11	Bulgaria	11,306	10%	3%	32%	-2.0%
12	France	11,128	9%	2.5%	7%	-6.4%
13	Lituania	10,636	9%	2.4%	34%	11.9%
14	Belgium	9,560	8.1%	2.1%	31%	-4.9%
15	Greece	9,308	7.9%	2.1%	38%	98.2%
16	Slovenia	8,341	7.1%	1.9%	45%	-1.2%
17	Austria	7,476	6.3%	1.7%	29%	0.4%
18	Latvia	6,026	5.1%	1.3%	42%	-8.3%
19	United Kingdom	5,971	5.1%	1.3%	3%	-10.0%
20	Croatia	4,939	4.2%	1.1%	44%	12,0%
21	Sweden	3,164	2.7%	0.7%	7%	-1.2%
22	Luxembourg	2,922	2.5%	0.6%	31%	8.3%
23	Estonia	2,815	2.4%	0.6%	42%	-4.0%
24	Norway	2,417	2.0%	0.5%	12%	-7.6%
25	Denmark	2,397	2.0%	0.5%	15%	10.9%
26	Ireland	1,744	1.5%	0.4%	15%	13.2%
27	Finland	1,641	1.4%	0.4%	6%	-32.1%
28	Switzerland	1,483	1.3%	0.3%	12%	-17.0%
29	Cyprus	19	0.0%	0.0%	3%	26.7%
	TOTAL	**450,749**			**23.9%**	**3.5%**

	Millions of t.km	Influence of bilateral activity into total RFT activity	Influence in the total	Development 2016/2015
EU15	215,970	17%	47.9%	0.6%
NMS except Malta	230,879	40%	1.2%	6.6%
EU28 except Malta	446,849	24%	99.1%	3.6%

The bilateral observation is similar to the one made on the international level. Apart from a few flags such as Germany, the Netherlands or Spain, that manage to keep part of their international transport directly carried out with their neighbouring trading partners, the EU15 is stagnating while the market is growing by +3.5%. Thus, the Eastern flags dominate the bilateral market thanks, in particular, to the Polish leader.

The growth gap between total international (+6.4%) and its bilateral component (+3.5%) predicts a shift towards the cross-trade RFT as in 2015.

As for the French RFT sector, it plummeted with -6.4% and descended to 12th place, achieving only 9% of the activity of the Polish leader. The increase of Romania with a rate of +10.7% should be noted, as well as the rebalancing of the Portuguese flag, +14% after a score of -13.9% in 2015.

CROSS-TRADE RFT - 2016

Rank	Flag holder	Millions of t.km Eurostat data	% compared to the first flag holder	Flag holder influence into all third-party countries activities	% compared to the total RFT activity of the flag holder	Development 2016/2015
1	Poland	53,037	100%	31%	18.2%	19.5%
2	Lituania	15,963	30%	9%	51.5%	21.4%
3	Romania	15,864	30%	9%	32.9%	49.2%
4	Bulgaria	14,203	27%	8%	40.1%	17.5%
5	Slovakia	13,879	26%	8%	38.4%	7.5%
6	Hungaria	11,710	22%	7%	29.3%	-2.0%
7	Slovenia	7,296	14%	4%	39.0%	10.1%
8	Portugal	6,493	12%	4%	18.6%	24.9%
9	Czech Republic	5,007	9%	3%	10.0%	-35.2%
10	Latvia	4,577	9%	3%	32.2%	-2.2%
11	Spain	4,046	8%	2.4%	1.9%	-1.4%
12	Netherlands	3,965	7.5%	2.3%	5.8%	-18.0%
13	Germany	3,500	6.6%	2.0%	1.1%	3.5%
14	Luxembourg	3,468	6.5%	2.0%	37.2%	3.5%
15	Croatia	2,360	4.4%	1.4%	20.8%	20.8%
16	Austria	1,670	3.1%	1.0%	6.4%	-8.9%
17	Estonia	1,610	3.0%	0.9%	24.0%	18.3%
18	Belgium	1,123	2.1%	0.7%	3.6%	-20.7%
19	Denmark	416	0.8%	0.2%	2.6%	-1.4%
20	Finland	369	0.7%	0.2%	1.4%	-14.2%
21	Ireland	347	0.7%	0/2%	3.0%	-2.8%
22	Italy	300	0.6%	0.2%	0.3%	50.0%
23	Switzerland	295	0.6%	0.2%	2.4%	139.8%
24	France	261	0.5%	0.2%	0.2%	-3.3%
25	Sweden	178	0.3%	0.1%	0.4%	31.9%
26	United Kingdom	152	0.3%	0.1%	0.1%	-48.8%
27	Greece	60	0.1%	0.0%	0.2%	33.3%
28	Norway	4	0.0%	0.0%	0.0%	-81.8%
29	Cyprus	0	0.0%	0.0%	0.0%	0.0%
	TOTAL	**172,153**			**9.1%**	**11.9%**

	Millions of t.km	Influence of third-party countries activity into total RFT activity	Influence in the total	Development 2016/2015
UE15	26,348	2.1%	15.3%	0.3%
NEM hors Malte	145,506	24.9%	84.5%	14.2%
UE28 hors Malte	171,854	9.3%	99.8%	11.8%

Growth in cross-trade RFT recorded a very high growth rate with +11.9%, exclusively captured by the Eastern flags. The EU15 stagnated with 0.3% while the New Member States grew by 14.2% in 2016. This new market, born in the early 2000s after the liberalisation of the market in Europe, is becoming a lever for development for the Eastern flags, of which some have become specialists, such as Lithuania or Bulgaria. The ability of the Eastern countries to adapt and their involvement abroad draws an RFT landscape that is different from what most Western companies had experienced until a few years ago. The diversification of transportation operations promotes the new market for cross-trade RFT at the expense of traditional bilateral activity.

The volume of activity of the French RFT sector, 24th in the rankings, represents only 0.2% of the European Union.

CABOTAGE - 2016

Rank	Flag holder	Millions of t.km Eurostat data	% compared to the first flag holder	Flag holder influence into all cabotage activites	% compared to total RFT activity of the flag holder	Development 2016/2015
1	Poland	12,972	100%	33%	4.5%	35.8%
2	Romania	3,038	23%	8%	6.3%	73.1%
3	Bulgaria	2,576	20%	7%	7.3%	71.5%
4	Spain	2,372	18%	6%	1.1%	-4.1%
5	Netherlands	2,034	16%	5%	3.0%	-10.6%
6	Luxembourg	1,741	13%	4%	18.7%	2.7%
7	Germany	1,614	12%	4%	0.5%	-9.9%
8	Slovakia	1,447	11%	4%	4.0%	10.5%
9	Lituania	1,404	11%	4%	4.5%	52.9%
10	Belgium	1,373	11%	4%	4.4%	3.5%
11	Portugal	1,308	10%	3%	3.8%	9.1%
12	Hungaria	1,146	9%	3%	2.9%	20.3%
13	Czech Republic	986	7.6%	3%	2.0%	-10.0%
14	Slovenia	936	7.2%	2.4%	5.0%	22.4%
15	Latvia	817	6.3%	2.1%	5.7%	19.4%
16	Italy	502	3.9%	1.3%	0.4%	23.3%
17	Estonia	499	3.9%	1.3%	7.4%	11.6%
18	Austria	488	3.8%	1.3%	1.9%	5.4%
19	United Kingdom	251	1.9%	0.6%	0.1%	-4.2%
20	France	249	1.9%	0.6%	0.2%	34.6%
21	Finland	249	1.9%	0.6%	0.9%	19.7%
22	Denmark	245	1.9%	0.6%	1.5%	-36.4%
23	Ireland	244	1.9%	0.6%	2.1%	0.4%
24	Switzerland	217	1.7%	0.6%	1.8%	26.9%
25	Sweden	71	1%	0.2%	0.2%	24.6%
26	Croatia	52	0.4%	0.1%	0.5%	173.7%
27	Norway	4	0.0%	0.0%	0.0%	-89.2%
28	Greece	0	0.0%	0.0%	0.0%	0.0%
29	Cyprus	0	0.0%	0.0%	0.0%	0.0%
	TOTAL	**38,835**		**100.0%**	**2.1%**	**20.7%**

	Millions of t.km	Influence of cabotage into total activity	Influence in the total	Development 2016/2015
EU15	12,741	1.0%	33%	-2%
NMS except Malta	25,873	4.4%	67%	36%
EU28 except Malta	38,614	2.1%	99%	21%

Cabotage literally exploded in 2016, with a record growth rate of 20.7%. The distribution of the activity is unbalanced, with the EU15 flags losing -2%, while the New Member State posted a score of +36%. The Polish leader rose by 35.8%. The two countries of the Balkans, Romania and Bulgaria, respectively, posted +73.1% and +71.5% and come 2nd and 3rd in the rankings, knocking the German giant out of the TOP 5.

This highly concentrated market, close to a third of which is dominated by the Polish leader, is gaining ground. Long regarded as a residual activity by the historic countries, cabotage is now a real market for a few specialised flags that integrate it into their transport organisation during major European rounds, as is often the case with the Romanian and Bulgarian flags.

With some 249 million t.km, France is in 20th place. The cabotage of foreign flags in France has grown to almost 10,000 million t.km. France thus receives 40 times more cabotage than it carries out. By contrast, Poland carries out 73 times more than it receives.

Conclusion

2016 looks like a turning point where trends are strengthening. Strong market growth is evident and its imbalance is obvious.

In the West, public authorities sometimes tend to forget that RFT is a key link in the trade chain and a catalyst for external trade, and hence economic growth. The RFT sector therefore stands apart from political-economic efforts. In this context, where they are increasingly shrinking, they are trying to keep their domestic market threatened by the rise of cabotage, whose official statistics would only reflect one part. It should also be noted that the current phenomenon of using LGVs for cabotage operations, remains outside the Eurostat study scope.

Conversely, the Eastern European flags are concentrated in international markets. Since 2016, a price war has been redistributing the maps. Some countries, such as Poland, for example, regard RFT as a political and strategic element in their relations with other Member States. Good relations between the private sector and the governments of some New Member States are less discreet. The biggest flags want to dominate the market, to impose their rules not only in the RFT sector, but also in the international trade of the Member States. Some Eastern flags are already bearing the brunt of the current price war and are losing market share, such as the Czech Republic, Latvia and Hungary.

Definitions

Europe: EU28 - Malta + Norway + Switzerland

UE28: All Members of the European Union in 2016.

UE15: The 15 oldest Member States of the European Union, namely Germany, Austria, Belgium, Denmark, Spain, Finland, France, Greece, Ireland, Italy, Luxembourg, the Netherlands, Portugal, the United Kingdom 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, the Czech Republic, 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).

RFT

Road freight transport

Source: Eurostat, European RFT database, A2 type with a pathway approach. Since Eurostat has revised its series several times, there may be differences in results with other publications. CNR uses and comments on the series issued on 5 February 2018.

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.