August 2019

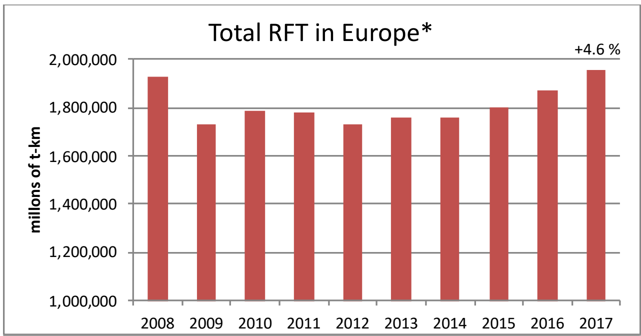
European Road Freight Transport (RFT) Ranking - 2017

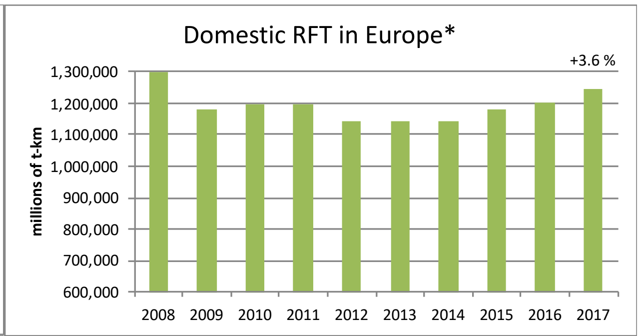
Poland takes the top spot

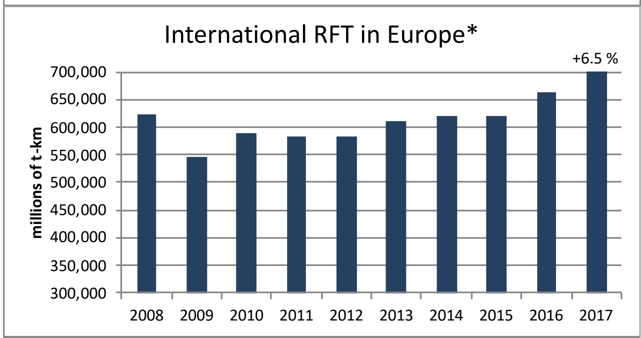
After emerging from the crisis in 2015, European RFT recorded another year of strong growth in 2017 (+4.6 %) and finally exceeded its pre-2008 crisis level. The growth in domestic activity was maintained at +3.6 % and international activity was almost as good as in the previous year, with sustained growth of +6.5 %. All international sub-activities grew strongly, but the top performer was cabotage, one-year growth rate of nearly +17 %, after a record year in 2016, when this rate exceeded +20 %.

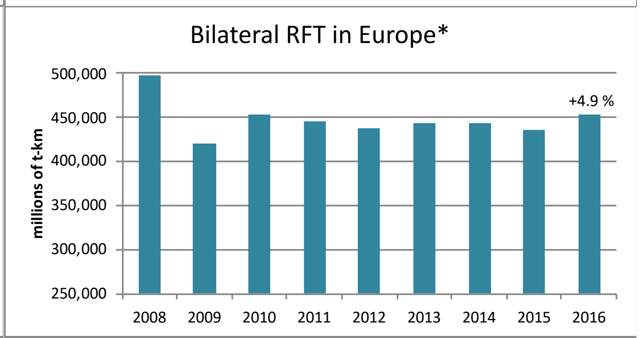
Strikingly, Poland achieved a breakthrough of more than +15 % growth in one year, propelling the country's sector to number 1 in Europe, thus dethroning the long-standing leader, Germany. 2017 was also a good year for the major flags in the South, such as Spain, Italy and France, which ended the year up respectively +,6.5 %, +7.6 % and +6.26 %. Germany fell by -0.83 % due to the significant decline in its international activity (-5.9 %).

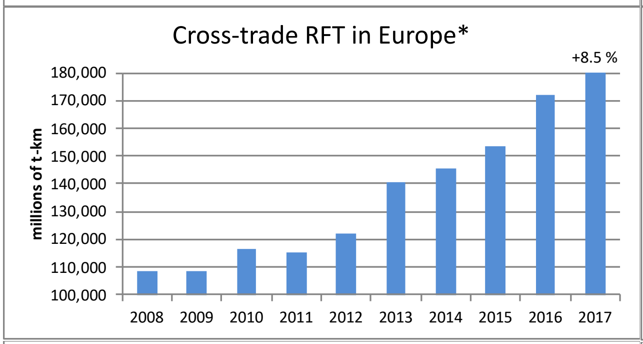
ECONOMIC OBSERVATORY OF RFT

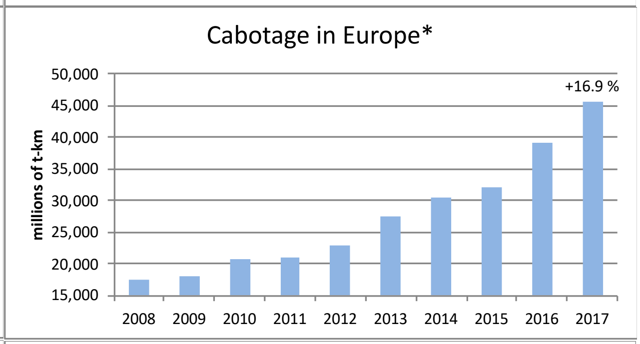


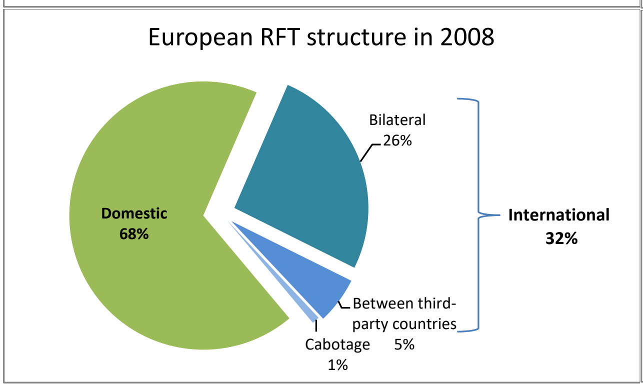


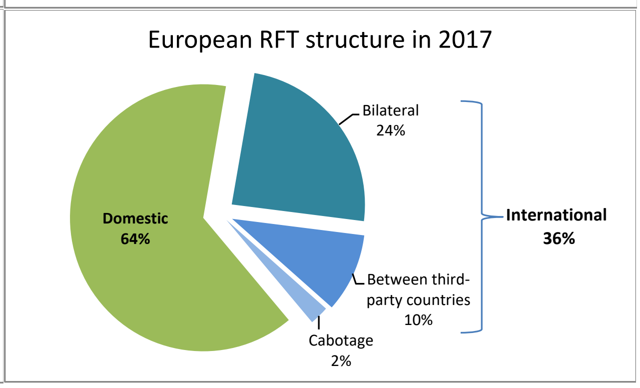












*See definitions on page 8

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ALL ROAD FREIGHT TRANSPORT ACTIVITY PER FLAG - 2017

Rank	Flag holder	Millions of t.km Eurostat data	Influence in the total	% compared to the first flag holder	Development 2017/2016	Ratio t.km/GDP
1	Poland	335,220	17.2%	100%	15.30%	717
2	Germany	313,149	16.0%	93%	-0.83%	97
3	Spain	231,109	11.8%	69%	6.50%	198
4	France	167,691	8.6%	50%	7.60%	73
5	United Kingdom	153,939	7.9%	46%	-0.71%	66
6	Italy	119,687	6.1%	36%	6.26%	69
7	Netherlands	67,533	3.5%	20%	-0.36%	91
8	Romania	54,704	2.8%	16%	13.55%	292
9	Czechia	44,274	2.3%	13%	-12.01%	231
10	Sweden	41,851	2.1%	12%	-1.93%	88
11	Hungary	39,684	2.0%	12%	-0.79%	320
12	Lithuania	39,099	2.0%	12%	26.23%	927
13	Slovakia	35,411	1.8%	11%	-2.01%	417
14	Bulgaria	35,150	1.8%	10%	-0.73%	680
15	Belgium	34,220	1.8%	10%	-2.76%	78
16	Portugal	34,186	1.7%	10%	-1.98%	176
17	Greece	28,377	1.5%	8.5%	15.54%	157
18	Finland	27,966	1.4%	8.3%	4.17%	125
19	Austria	25,978	1.3%	7.7%	-0.61%	70
20	Norway	21,385	1.1%	6.4%	2.27%	60
21	Slovenia	20,814	1.1%	6.2%	11.26%	484
22	Denmark	15,501	0.8%	4.6%	-3.68%	53
23	Latvia	14,972	0.8%	4.5%	5.24%	554
24	Switzerland	11,947	0.6%	3.6%	-1.54%	20
25	Ireland	11,836	0.6%	3.5%	1.89%	40
26	Croatia	11,834	0.6%	3.5%	4.38%	242
27	Luxembourg	9,414	0.5%	2.8%	0.97%	170
28	Estonia	6,189	0.3%	1.8%	-7.85%	262
29	Cyprus	826	0.0%	0.2%	17.50%	42
	TOTAL	**1,953,946**	**100.0%**		**4.6%**	**119**

	Millions of t.km	Influence in the total	Development 2017/2016
EU 15	1,282,437	65.6%	2.48%
NMS except Malta	638,177	32.7%	9.38%
EU 28 except Malta	1,920,614	98.3%	4.67%

Total activity continued to maintain the same momentum as in 2016, with a growth rate of 4.6 % year-on-year. 15 out of the 29 countries listed in the ranking reported a positive rate, but growth is far from homogeneous.

The weight of the EU15 in European total is constantly decreasing: 65.6 % in 2017 compared to 76.3 % in 2008. The EU28 growth of +4.66 % conceals the impressive dynamism of the New Member States (NMS): +9.3 %. However, some NMS's reported a decline in activity, such as Estonia (-7.85 %) or Bulgaria (-0.73 %). Czechia recorded a sharp decline of -12 %. Nevertheless, according to the Czech statistics office, the data might still be revised in the coming months.

When it comes to RFT activities as a whole, the top of the ranking has changed. Poland ranks first thanks to a breakthrough of +15 % growth in one year. It accounts for more than half of the activity of the New Member States and one sixth of activity across the EU. Germany now ranks 2nd. Spain has retained 3rd place in the ranking and the United Kingdom has lost the 4th spot to France, which posted a growth rate of +7.6 % over the year.

The t.km/GDP indicator makes it possible to compare countries' economic specialisation in the area of RFT activity.

DOMESTIC RFT PER FLAG - 2017

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 2017/2016
1	Germany	271,666	87%	21.8%	100%	0.0%
2	France	155,876	93%	12.5%	57%	8.1%
3	Spain	154,666	67%	12.4%	57%	6.7%
4	United Kingdom	147,349	96%	11.8%	54%	-0.9%
5	Poland	120,036	36%	9.6%	44%	12.6%
6	Italy	106,711	89%	8.6%	39%	6.4%
7	Sweden	38,556	92%	3.1%	14%	-1.8%
8	Netherlands	33,162	49%	2.7%	12%	-2.6%
9	Finland	26,330	94%	2.1%	9.7%	7.1%
10	Czechia	21,899	49%	1.8%	8.1%	-1.8%
11	Belgium	20,632	60%	1.7%	7.6%	-3.7%
12	Norway	18,741	88%	1.5%	6.9%	1.2%
13	Austria	16,803	65%	1.3%	6.2%	1.8%
14	Greece	15,471	55%	1.2%	5.7%	1.8%
15	Romania	13,548	25%	1.1%	5.0%	3.1%
16	Denmark	12,577	81%	1.0%	4.6%	-3.5%
17	Hungary	11,940	30%	1.0%	4.4%	1.9%
18	Portugal	10,854	32%	0.9%	4.0%	4.5%
19	Switzerland	10,238	86%	0.8%	3.8%	1.0%
20	Ireland	9,326	79%	0.7%	3.4%	0.5%
21	Bulgaria	8,328	24%	0.7%	3.1%	13.7%
22	Slovakia	6,326	18%	0.5%	2.3%	11.0%
23	Croatia	4,199	35%	0.3%	1.5%	5.3%
24	Latvia	3,240	22%	0.3%	1.2%	15.4%
25	Lithuania	3,184	8%	0.3%	1.2%	7.2%
26	Slovenia	2,310	11%	0.2%	0.9%	8.2%
27	Estonia	1,631	26%	0.1%	0.6%	-9.0%
28	Luxembourg	1,211	13%	0.1%	0.4%	1.6%
29	Cyprus	802	97%	0.1%	0.3%	17.3%
	TOTAL	**1,247,612**	**63.9%**	**100%**		**3.6%**

	Millions of t.km	Influence of domestic into total RFT	Influence in the total domestic	Development 2017/2016
EU 15	1,021,190	79.6%	81.9%	2.65%
NMS except Malta	197,443	30.9%	15.8%	8.97%
EU 28 except Malta	1,218,633	63.5%	97.7%	3.63%

Domestic activity in Europe increased by 3.6 % in 2017 thanks in particular to the continued development of New Member States: +8.97 %. Poland, Bulgaria and Latvia recorded sharp increases of +12.6 %, 13.7 % and 15.4 % respectively in one year. Caution should be exercised when analysing the poor Belgian result (-3.7 %) because their RFT statistics are currently unstable.

In terms of the ranking, Germany has retained 1st place, followed by France, which has moved into 2nd place and is now ahead of the United Kingdom and Spain. The UK is down to 4th place, with Spain replacing them in third place. The share of domestic activity continued to increase for almost all Western European sectors. This proportion is 93 % in France, 87 % in Germany and 96 % in the United Kingdom. In contrast, the domestic share in total activity continued to decrease in Eastern European countries: 36 % in Poland, 25 % in Romania, 8 % in Lithuania.

In absolute terms, the Polish domestic market exceeded that of Italy. In the end, only two flags from the New Member States feature in the "domestic" TOP 10.

INTERNATIONAL RFT PER FLAG - 2017

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 2017/2016
1	Poland	215,184	64.2%	30.5%	100.0%	16.9%
2	Spain	76,442	33.1%	10.8%	35.5%	6.2%
3	Germany	41,483	13.2%	5.9%	19.3%	-5.9%
4	Romania	41,156	75.2%	5.8%	19.1%	17.5%
5	Lithuania	35,915	91.9%	5.1%	16.7%	28.2%
6	Netherlands	34,371	50.9%	4.9%	16.0%	1.9%
7	Slovakia	29,085	82.1%	4.1%	13.5%	-4.5%
8	Hungary	27,744	69.9%	3.9%	12.9%	-1.9%
9	Bulgaria	26,822	76.3%	3.8%	12.5%	-4.5%
10	Portugal	23,331	68.2%	3.3%	10.8%	-4.8%
11	Czechia	22,374	50.5%	3.2%	10.4%	-20.1%
12	Slovenia	18,504	88.9%	2.6%	8.6%	11.7%
13	Belgium	13,588	39.7%	1.9%	6.3%	-1.3%
14	Italy	12,976	10.8%	1.8%	6.0%	5.0%
15	Greece	12,906	45.5%	1.8%	6.0%	37.8%
16	France	11,815	7.0%	1.7%	5.5%	1.5%
17	Latvia	11,732	78.4%	1.7%	5.5%	2.7%
18	Austria	9,175	35.3%	1.3%	4.3%	-4.8%
19	Luxembourg	8,203	87.1%	1.2%	3.8%	0.9%
20	Croatia	7,635	64.5%	1.1%	3.5%	3.9%
21	United Kingdom	6,590	4.3%	0.9%	3.1%	4.3%
22	Estonia	4,558	73.6%	0.6%	2.1%	-7.4%
23	Sweden	3,295	7.9%	0.5%	1.5%	-3.5%
24	Denmark	2,924	18.9%	0.4%	1.4%	-4.4%
25	Norway	2,645	12.4%	0.4%	1.2%	10.3%
26	Ireland	2,511	21.2%	0.4%	1.2%	7.5%
27	Switzerland	1,709	14.3%	0.2%	0.8%	-14.3%
28	Finland	1,636	5.8%	0.2%	0.8%	-27.6%
29	Cyprus	24	2.9%	0.0%	0.0%	33.3%
	TOTAL	**706,333**	**36.1%**	**100%**		**6.5%**

	Millions of t.km	Influence of international into total RFT	Influence in the total international	Development 2017/2016
EU 15	261,246	20.4%	37.0%	1.81%
NMS except Malta	440,733	69.1%	62.4%	9.56%
EU 28 except Malta	701,979	36.5%	99.4%	6.54%

International activity in the EU28 continued to grow with a high growth rate of +6.54 %. However, the Western sectors benefited very little from this increase, with the exception of Spain (+6.2 %) and Italy (+5 %). The Eastern European flags accounted in the main for this growth (+9.56 % for New Member States). At the top of the ranking, Poland recorded sustained growth, up 16.9 % in one year, thus consolidating its position as market leader. Lithuania also made remarkable progress, up 28.2 % in one year, from 10th to 5th place in the ranking, behind Romania. Czechia, on the other hand, fell back to 11th place, continuing to lose market share and seems to be unable to compete with its low-cost neighbours.

With a poor result of -5.9 %, Germany only achieved 19 % of the activity volume of the ranking-topper, Poland. Germany barely outperformed Romania, which, like the Polish flag, is heavily committed to its international activity. Lithuania is almost entirely focused on the international market with nearly 92 % of its activity carried out in this segment. Other sectors, such as those of Hungary, Romania and Bulgaria, posted results not too far behind this “record” figure.

BILATERAL - 2017						
Rank	Flag holder	Millions of t.km Eurostat data	Influence of bilateral for the flag	Flag holder influence into bilateral total	% compared to the first flag	Development 2017/2016
1	Poland	135,567	100.0%	28.6%	40.4%	14.8%
2	Spain	69,501	51.3%	14.7%	30.1%	6.0%
3	Germany	36,558	27.0%	7.7%	11.7%	-6.2%
4	Netherlands	28,074	20.7%	5.9%	41.6%	0.9%
5	Czechia	18,223	13.4%	3.8%	41.2%	-17.2%
6	Romania	17,565	13.0%	3.7%	32.1%	8.9%
7	Hungary	16,337	12.1%	3.4%	41.2%	5.9%
8	Portugal	15,579	11.5%	3.3%	45.6%	-6.7%
9	Slovakia	15,001	11.1%	3.2%	42.4%	-0.8%
10	Greece	12,858	9.5%	2.7%	45.3%	38.1%
11	Lithuania	12,422	9.2%	2.6%	31.8%	16.8%
12	Italy	11,899	8.8%	2.5%	9.9%	3.0%
13	France	11,259	8.3%	2.4%	6.7%	1.2%
14	Belgium	11,035	8.1%	2.3%	32.2%	2.1%
15	Bulgaria	10,182	7.5%	2.1%	29.0%	-9.9%
16	Slovenia	9,031	6.7%	1.9%	43.4%	8.3%
17	Austria	7,314	5.4%	1.5%	28.2%	-2.2%
18	Latvia	6,235	4.6%	1.3%	41.6%	3.5%
19	United Kingdom	6,056	4.5%	1.3%	3.9%	2.2%
20	Croatia	4,978	3.7%	1.1%	42.1%	0.8%
21	Luxembourg	3,001	2.2%	0.6%	31.9%	2.7%
22	Sweden	2,967	2.2%	0.6%	7.1%	-6.2%
23	Estonia	2,711	2.0%	0.6%	43.8%	-3.7%
24	Norway	2,640	1.9%	0.6%	12.3%	10.5%
25	Denmark	2,395	1.8%	0.5%	15.5%	-0.1%
26	Ireland	1,702	1.3%	0.4%	14.4%	-2.4%
27	Switzerland	1,424	1.1%	0.3%	11.9%	-4.0%
28	Finland	1,281	0.9%	0.3%	4.6%	-21.9%
29	Cyprus	24	0.0%	0.0%	2.9%	26.3%
	TOTAL	**473,819**		**100%**	**24.2%**	**4.9%**

	Millions of t.km	Influence in total RFT activity	Influence in the bilaretal total	Development 2017/2016
EU 15	221,479	17.3%	46.7%	1.99%
NMS except Malta	248,276	38.9%	52.4%	7.54%
EU 28 except Malta	469,755	24.5%	99.1%	4.85%

Traditional international activity (i.e. bilateral) grew more slowly than other international sub-activities. Poland, the leader in all segments, consolidated its position thanks to a growth rate of +14.8 %. Spain grew by +6 % but could only achieve 50 % of the activity volume of the Polish sector. Germany, Czechia and Portugal declined, but managed to remain in the TOP 10. The performance of the Greek sector (+38.1 %) is noteworthy, but this will need to be reconfirmed over the long term, since local statistics are often questionable and may be revised in the years to come.

The French flag grew by +1.2 %, which is lower than the European average. Its bilateral share in total activity fell to 6.7 %, a figure far below that of its neighbours, more in line with the results of island based flags or those of Scandinavian countries.

CROSS-TRADE RFT - 2017						
Rank	Flag holder	Millions of t.km Eurostat data	Influence of cross-trade RFT for the flag	Flag holder influence into cross-trade	% compared to the first flag	Development 2017/2016
1	Poland	61,720	100.0%	33.0%	18.4%	16.4%
2	Lithuania	20,926	33.9%	11.2%	53.5%	31.1%
3	Romania	19,669	31.9%	10.5%	36.0%	24.0%
4	Bulgaria	14,477	23.5%	7.7%	41.2%	1.9%
5	Slovakia	12,698	20.6%	6.8%	35.9%	-8.5%
6	Hungary	10,180	16.5%	5.4%	25.7%	-13.1%
7	Slovenia	8,413	13.6%	4.5%	40.4%	15.3%
8	Portugal	6,412	10.4%	3.4%	18.8%	-1.2%
9	Latvia	4,468	7.2%	2.4%	29.8%	-2.4%
10	Netherlands	4,339	7.0%	2.3%	6.4%	9.8%
11	Spain	4,160	6.7%	2.2%	1.8%	2.8%
12	Luxembourg	3,580	5.8%	1.9%	38.0%	3.2%
13	Czechia	3,537	5.7%	1.9%	8.0%	-29.4%
14	Germay	3,265	5.3%	1.7%	1.0%	-6.7%
15	Croatia	2,496	4.0%	1.3%	21.1%	5.8%
16	Estonia	1,503	2.4%	0.8%	24.3%	-6.6%
17	Austria	1,383	2.2%	0.7%	5.3%	-17.2%
18	Belgium	1,226	2.0%	0.7%	3.6%	-7.5%
19	Italy	612	1.0%	0.3%	0.5%	104.0%
20	Ireland	505	0.8%	0.3%	4.3%	45.5%
21	Denmark	313	0.5%	0.2%	2.0%	-24.8%
22	France	274	0.4%	0.1%	0.2%	5.0%
23	United Kingdom	225	0.4%	0.1%	0.1%	52.0%
24	Sweden	198	0.3%	0.1%	0.5%	11.2%
25	Finland	155	0.3%	0.1%	0.6%	-58.0%
26	Switzerland	133	0.2%	0.1%	1.1%	-54.9%
27	Greece	47	0.1%	0.0%	0.2%	-21.7%
28	Norway	1	0.0%	0.0%	0.0%	-75.0%
29	Cyprus	0	0.0%	0.0%	0.0%	0.0%
	TOTAL	**186,915**		**100%**	**9.6%**	**8.5%**

	Millions of t.km	Influence in total RFT activity	Influence in the cross-trade total	Development 2017/2016
EU 15	26,694	2.1%	14.3%	0.60%
NMS except Malta	160,087	25.1%	85.6%	10.02%
EU 28 except Malta	186,781	9.7%	99.9%	8.57%

Growth in international cross-trade RFT again recorded a high growth rate in 2017, +8.57 % for the EU28. The gaps between EU15 and New Member States were still very large. Thus, while the EU15 stagnated with +0.60 %, New Member States continued to make advances, with one-year growth of +10.02 %. The top eight flags that dominate the market are all Eastern European, while the bottom 13 places in the ranking are occupied exclusively by Western and Southern European countries. It is worth noting that this new market, born in the early 2000s after the liberalisation of the market in Europe, is an important lever for development for the Eastern European sectors, some of which have become specialists in this field, such as Lithuania (2nd in the ranking) and Bulgaria (4th).

The volume of activity of the French flag (22nd in the ranking), represented only 0.4 % of the figure for European Union as a whole. Despite growth of +5 % in 2017, international RFT between third countries remains a marginal activity for France, as for all its neighbours.

The significant increase in this activity within the Polish and Lithuanian sectors, specialists in the German market, largely explains the fall in German bilateral activity.

CABOTAGE - 2017						
Rank	Flag holder	Millions of t.km Eurostat data	Influence of cabotage for the flag	Flag holder influence into cabotage total	% compared to the first flag	Development 2017/2016
1	Poland	17,897	100.0%	39.2%	5.3%	38.0%
2	Romania	3,921	21.9%	8.6%	7.2%	29.1%
3	Spain	2,781	15.5%	6.1%	1.2%	17.2%
4	Lithuania	2,567	14.3%	5.6%	6.6%	82.8%
5	Bulgaria	2,163	12.1%	4.7%	6.2%	-16.0%
6	Netherlands	1,958	10.9%	4.3%	2.9%	-0.2%
7	Germany	1,660	9.3%	3.6%	0.5%	2.9%
8	Luxembourg	1,622	9.1%	3.6%	17.2%	-6.8%
9	Slovakia	1,386	7.7%	3.0%	3.9%	-4.2%
10	Portugal	1,341	7.5%	2.9%	3.9%	2.5%
11	Belgium	1,326	7.4%	2.9%	3.9%	-18.6%
12	Hungary	1,227	6.9%	2.7%	3.1%	7.1%
13	Slovenia	1,059	5.9%	2.3%	5.1%	13.1%
14	Latvia	1,029	5.7%	2.3%	6.9%	25.9%
15	Czechia	614	3.4%	1.3%	1.4%	-37.7%
16	Austria	479	2.7%	1.1%	1.8%	-1.8%
17	Italy	465	2.6%	1.0%	0.4%	-7.4%
18	Estonia	344	1.9%	0.8%	5.6%	-31.1%
19	United Kingdom	309	1.7%	0.7%	0.2%	26.6%
20	Ireland	304	1.7%	0.7%	2.6%	24.6%
21	France	282	1.6%	0.6%	0.2%	13.3%
22	Denmark	216	1.2%	0.5%	1.4%	-11.8%
23	Finland	201	1.1%	0.4%	0.7%	-19.3%
24	Croatia	161	0.9%	0.4%	1.4%	209.6%
25	Switzerland	152	0.8%	0.3%	1.3%	-30.0%
26	Sweden	130	0.7%	0.3%	0.3%	83.1%
27	Norway	4	0.0%	0.0%	0.0%	0.0%
28	Greece	0	0.0%	0.0%	0.0%	0.0%
29	Cyprus	0	0.0%	0.0%	0.0%	0.0%
	TOTAL	**45,598**		**100%**	**2.3%**	**16.9%**

	Millions of t.km	Influence in total RFT activity	Influence in the cabotage total	Development 2017/2016
EU 15	13,074	1.0%	28.7%	1.21%
NMS except Malta	32,368	5.1%	71.0%	25.10%
EU 28 except Malta	45,442	2.4%	99.7%	17.15%

Cabotage accounts for less than 4 % of the domestic activity of the European sectors. However, it is by far the activity that has been growing the most for several years. Its growth rate reached +16.9 % in 2017, thanks in particular to the spectacular performance of the top 4 sectors in the ranking. It is worth mentioning the presence of Spain in third place, with growth rate of +17%, which reflects the strong performance achieved by this flag in 2017.

Unsurprisingly, 71 % of European cabotage is provided by New Member States. The 25.1 % year-on-year increase in cabotage by New Member States, compared with only 1.21 % by the EU15, illustrates the strategic positioning of the Eastern European sectors, which have penetrated the domestic markets of the main Western countries: 47 % of total European cabotage takes place on German territory and 27 % on French territory (statistics not included in present tables). By way of comparison, the cabotage carried out by the Polish flag is 1.5 times greater than the total international activity of the French flag. It exceeds the domestic activity of the Austrian sector and is close to the Belgian level of domestic activity. Thus, France saw 40 times more cabotage carried out by other sectors than it carried out itself, a disappointing all-time record within the EU. As for Germany, it saw 12 times more cabotage carried out by other sectors than it carried out. However, this is not a foregone conclusion in all Western European countries; for example, the Dutch sector carried out twice as much cabotage as was performed in the Netherlands by the other European flags.

Conclusion

In the end, 2017 was perfectly in line with the ongoing trend over the past several years in Europe. The European RFT sector is doing well overall, but growth is unevenly distributed among the national sectors. Those from the countries in Eastern Europe achieved record results thanks to the expansion of their international activity, particularly in the cross-trade and cabotage segments. The flags of the most developed economies in Western Europe are increasingly focused on their domestic market, which is threatened by the constant growth in cabotage. CNR studies carried out at national level show that the dynamics of the labour market in Western Europe no longer permit long, international journeys. These dynamics also have a negative impact on long-distance domestic journeys, a boon that Eastern European drivers are quick to exploit in exchange for salaries that are sometimes 3 times higher than their national average.

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, 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).

RFT

Road freight transport

Source: Eurostat, European RFT database, A2 type with a pathway approach, based on the version available in July 2019, 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.