

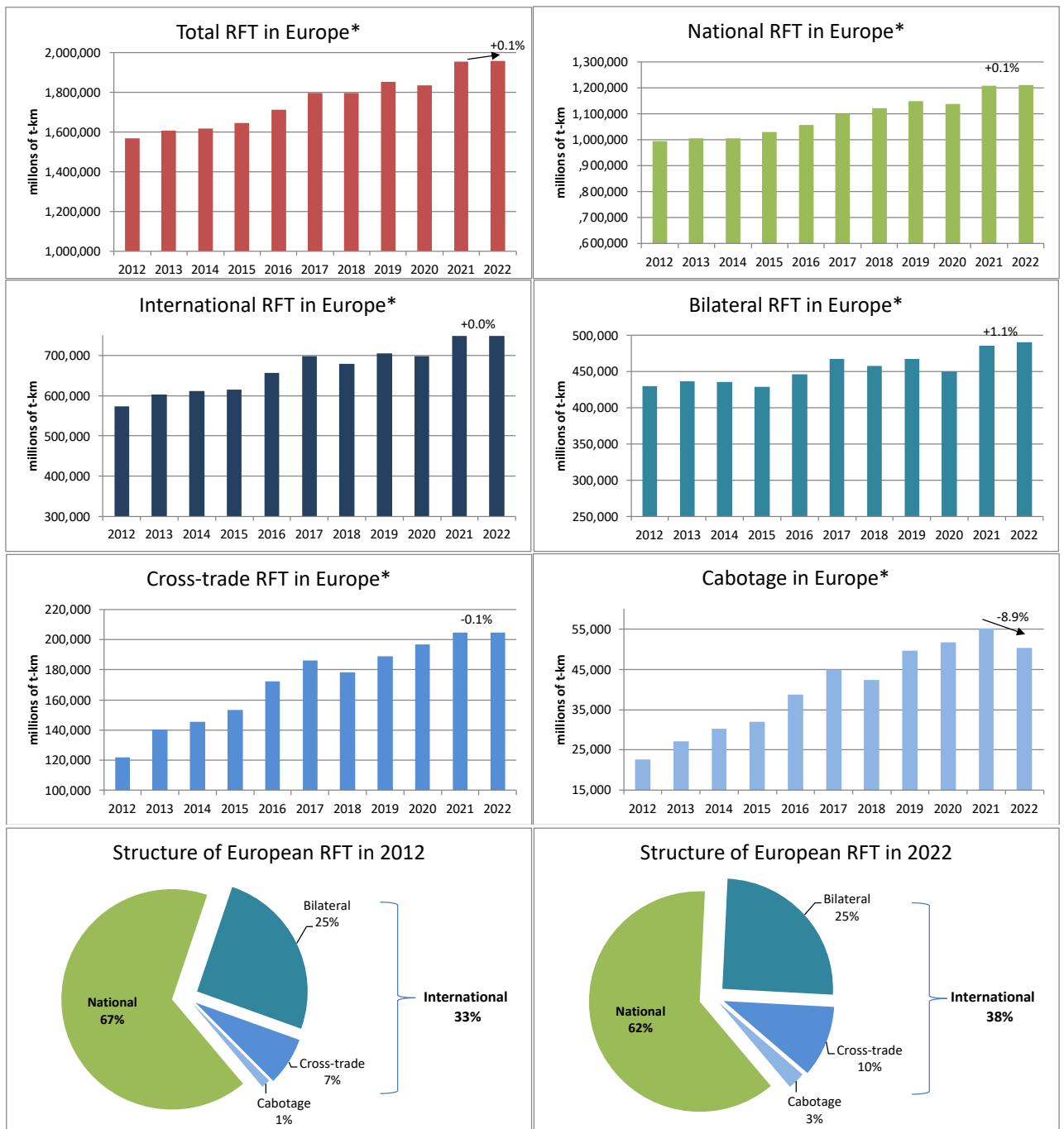
2022 European RFT Ranking

Stability after post-Covid recovery

After two years of strong fluctuations, European RFT activity ends the year 2022 in balance compared to 2021. The two major components, domestic and international, react in the same way.

Between 2021 and 2022, the market increases by +0.1%. The stagnation of total RFT activity does not, however, apply to all national sectors, with some losing a few points, particularly at the top of the domestic activity ranking. Internationally, if bilateral activity increases more than average, +1%, cross-trade activity stabilizes and cabotage loses -8.9%.

Overall, the evolution over 10 years shows that international activity is gaining ground, cross-trade activity and cabotage are growing strongly, while national activity is losing 5 points in the total.



*Voir définitions page 8

ALL ROAD FREIGHT TRANSPORT ACTIVITY PER FLAG - 2022

Rank	Flag holder	Millions of t.km Eurostat data	Influence in the total	% compared to the first flag holder	Development 2022/2021	Ratio t.km/GDP
1	Poland	385,089	19.7%	100.0%	1.4%	588
2	Germany	303,948	15.5%	78.9%	-1.1%	78
3	Spain	266,724	13.6%	69.3%	-1.3%	198
4	France	173,353	8.9%	45.0%	-0.9%	66
5	Italy	151,100	7.7%	39.2%	4.2%	77
6	Netherlands	67,148	3.4%	17.4%	-4.4%	70
7	Czechia	65,794	3.4%	17.1%	3.2%	238
8	Romania	64,353	3.3%	16.7%	4.0%	226
9	Lithuania	53,773	2.7%	14.0%	-6.9%	798
10	Sweden	47,865	2.4%	12.4%	0.8%	85
11	Hungary	37,444	1.9%	9.7%	0.9%	222
12	Bulgaria	35,134	1.8%	9.1%	0.0%	390
13	Belgium	33,480	1.7%	8.7%	-7.4%	63
14	Portugal	32,039	1.6%	8.3%	0.0%	132
15	Slovakia	31,488	1.6%	8.2%	4.3%	287
16	Finland	30,590	1.6%	7.9%	3.3%	114
17	Austria	26,830	1.4%	7.0%	-1.7%	60
18	Norway	24,428	1.2%	6.3%	8.3%	43
19	Slovenia	24,308	1.2%	6.3%	-2.6%	428
20	Greece	21,182	1.1%	5.5%	0.6%	103
21	Denmark	15,162	0.8%	3.9%	-1.2%	40
22	Latvia	14,581	0.7%	3.8%	-3.5%	380
23	Croatia	13,659	0.7%	3.5%	0.2%	201
24	Switzerland	12,988	0.7%	3.4%	2.3%	17
25	Ireland	12,364	0.6%	3.2%	-1.0%	24
26	Luxembourg	7,353	0.4%	1.9%	6.5%	95
27	Estonia	4,540	0.2%	1.2%	-13.3%	126
28	Cyprus	949	0.0%	0.2%	29.8%	34
TOTAL		1,957,666	100.0%		0.1%	114
			Millions of t.km	Influence in the total	Development 2022/2021	
EU 14			1,189,138	60.7%	-0.57%	
NMS except Malta			731,112	37.3%	0.81%	
EU 27 except Malta			1,920,250	9.8%	-0.05%	

* Indicator serving to compare the economic specialization of the flag

Poland, market leader, all activities combined, confirms its position thanks to an increase in its activity of +1.4% between 2021 and 2022. Over the same period, its three western competitors are losing ground: the German sector loses -1.1%, the Spanish sector -1.3% and the French sector -0.9%. The Top 5 does not change.

As a whole, the European RFT is stagnating. In the west, certain national sectors are doing better. Italy gains +4.2%, Norway +8.3%. Others recorded significant declines, such as the Dutch sector, -4.4% or the Belgian sector, -7.4%. Among the new member states (NMS), particularly in the Baltic countries, Lithuania experienced a decline with -6.9%, Latvia -3.5% and Estonia -13.3%. The consequences of the war in Ukraine, notably the closure of the border with Russia and Belarus, seem to be affecting them severely.

DOMESTIC RFT PER FLAG - 2022						
Rank	Flag holder	Millions of t.km Eurostat data	Influence of domestic RFT for the flag	Flag holder influence into domestic	% compared to the first flag	Development 2022/2021
1	Germany	268,557	88.4%	22.2%	100.0%	-1.3%
2	Spain	178,005	66.7%	14.7%	66.3%	-2.4%
3	France	160,535	92.6%	13.3%	59.8%	-1.3%
4	Poland	140,032	36.4%	11.6%	52.1%	3.9%
5	Italy	132,267	87.5%	10.9%	49.3%	2.9%
6	Sweden	45,759	95.6%	3.8%	17.0%	2.2%
7	Netherlands	35,902	53.5%	3.0%	13.4%	-1.5%
8	Czechia	30,762	46.8%	2.5%	11.5%	3.4%
9	Finland	29,005	94.8%	2.4%	10.8%	4.9%
10	Norway	22,325	91.4%	1.8%	8.3%	9.4%
11	Belgium	22,052	65.9%	1.8%	8.2%	-5.2%
12	Romania	21,994	34.2%	1.8%	8.2%	7.5%
13	Austria	17,565	65.5%	1.5%	6.5%	-2.5%
14	Greece	16,182	76.4%	1.3%	6.0%	-1.8%
15	Hungary	13,926	37.2%	1.2%	5.2%	-5.8%
16	Denmark	12,755	84.1%	1.1%	4.7%	-0.8%
17	Switzerland	10,868	83.7%	0.9%	4.0%	0.2%
18	Ireland	10,182	82.4%	0.8%	3.8%	-0.5%
19	Portugal	9,055	28.3%	0.7%	3.4%	-3.6%
20	Bulgaria	8,817	25.1%	0.7%	3.3%	-2.3%
21	Slovakia	6,203	19.7%	0.5%	2.3%	-1.5%
22	Croatia	4,854	35.5%	0.4%	1.8%	1.1%
23	Latvia	3,989	27.4%	0.3%	1.5%	-1.8%
24	Lithuania	3,182	5.9%	0.3%	1.2%	-17.6%
25	Slovenia	2,567	10.6%	0.2%	1.0%	4.2%
26	Estonia	1,797	39.6%	0.1%	0.7%	-0.2%
27	Cyprus	923	97.3%	0.1%	0.3%	31.3%
28	Luxembourg	588	8.0%	0.0%	0.2%	-5.3%
TOTAL		1,210,648	61.8%	100.0%		0.1%
			Millions of t.km	Influence of domestic into total RFT	Influence in the total domestic	Development 2022/2021
EU 14			938,409	78.9%	77.5%	-0.7%
NMS except Malta			239,046	32.7%	19.7%	2.7%
EU 27 except Malta			1,177,455	61.3%	97.3%	-0.1%

Domestic activity follows the general trend with a small increase of +0.1%. Here again, the first three sectors in the ranking, all in western Europe, are suffering. Norway progressed strongly with +9.4% following the political decisions taken to favor the national sector. The Polish and Italian sectors saw their domestic market grow by +3.9% and +2.9% respectively.

Among the oldest EU member states, Belgium recorded a negative result of -5.2% followed by the Netherlands, -1.5%. The catch-up effect continues for certain NMS with +3.4% for Czechia and +7.5% for Romania, while 6 of them are regressing, notably the 3 Baltic countries, perhaps linked to the conflict in Ukraine.

The share of the EU14 in domestic activity drops to 77.5% while its weight in total activity represents only 60% (see previous page).

INTERNATIONAL RFT PER FLAG - 2022

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 2022/2021
1	Poland	245 057	63.6%	32.8%	100.0%	0.0%
2	Spain	88 719	33.3%	11.9%	36.2%	1.2%
3	Lithuania	50 591	94.1%	6.8%	20.6%	-6.1%
4	Romania	42 359	65.8%	5.7%	17.3%	2.3%
5	Germany	35 390	11.6%	4.7%	14.4%	0.3%
6	Czechia	35 032	53.2%	4.7%	14.3%	3.1%
7	Netherlands	31 246	46.5%	4.2%	12.8%	-7.5%
8	Bulgaria	26 316	74.9%	3.5%	10.7%	0.8%
9	Slovakia	25 285	80.3%	3.4%	10.3%	5.8%
10	Hungary	23 518	62.8%	3.1%	9.6%	5.4%
11	Portugal	22 984	71.7%	3.1%	9.4%	1.4%
12	Slovenia	21 741	89.4%	2.9%	8.9%	-3.4%
13	Italy	18 833	12.5%	2.5%	7.7%	14.6%
14	France	12 818	7.4%	1.7%	5.2%	4.4%
15	Belgium	11 428	34.1%	1.5%	4.7%	-11.5%
16	Latvia	10 592	72.6%	1.4%	4.3%	-4.1%
17	Austria	9 266	34.5%	1.2%	3.8%	-0.1%
18	Croatia	8 805	64.5%	1.2%	3.6%	-0.2%
19	Luxembourg	6 765	92.0%	0.9%	2.8%	7.7%
20	Greece	4 999	23.6%	0.7%	2.0%	9.4%
21	Estonia	2 743	60.4%	0.4%	1.1%	-20.2%
22	Denmark	2 406	15.9%	0.3%	1.0%	-2.9%
23	Ireland	2 182	17.6%	0.3%	0.9%	-3.2%
24	Switzerland	2 120	16.3%	0.3%	0.9%	14.7%
25	Sweden	2 106	4.4%	0.3%	0.9%	-22.3%
26	Norway	2 103	8.6%	0.3%	0.9%	-1.6%
27	Finland	1 585	5.2%	0.2%	0.6%	-19.4%
28	Cyprus	26	2.7%	0.0%	0.0%	-7.1%

TOTAL		747 015	38.2%	100.0%	0.0%
	Millions of t.km	Influence of domestic into total RFT	Influence in the total domestic	Development 2022/2021	
EU 14	250 727	21.1%	33.6%	0.1%	
NMS except Malta	492 065	67.3%	65.9%	-0.1%	
EU 27 except Malta	742 792	38.7%	99.4%	0.0%	

Following the trend in global activity, international activity is standing still, but not all national sectors are in the same boat. While the Baltic countries are losing market share, Spain and Portugal are doing better than average with +1.2% and +1.4% respectively. The Italian (+14.6%) and French (+4.4%) sectors are making strong progress. After several years of sustained growth, the NMS fell by -0.1% while the EU14 posted +0.05%.

The Polish sector remains the market leader with almost 33% of the total. There is no upheaval at the top of the podium. Second in the ranking, the Spanish sector is a third of the volume of the leader. Germany, 5th in the ranking, is now closely followed by Czechia.

All the Baltic and Scandinavian sectors pull back in their international activity, quite strongly in some countries: around -20% for Sweden, Finland and Estonia.

BILATERAL - 2022						
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 2022/2021
1	Poland	145,588	37.8%	100.0%	29.6%	-0.2%
2	Spain	81,610	30.6%	56.1%	16.6%	1.9%
3	Germany	30,883	10.2%	21.2%	6.3%	-1.3%
4	Netherlands	28,343	43.1%	19.5%	5.8%	3.5%
5	Czechia	25,971	38.7%	17.8%	5.3%	-6.9%
6	Romania	22,713	35.3%	15.6%	4.6%	7.2%
7	Hungary	17,236	11.4%	11.8%	3.5%	13.5%
8	Italy	16,014	42.8%	11.0%	3.3%	3.9%
9	Portugal	14,896	46.5%	10.2%	3.0%	2.3%
10	Slovakia	14,824	47.1%	10.2%	3.0%	3.2%
11	Bulgaria	13,489	38.4%	9.3%	2.7%	18.3%
12	France	11,908	6.9%	8.2%	2.4%	4.6%
13	Lithuania	10,921	44.9%	7.5%	2.2%	1.6%
14	Slovenia	10,256	19.1%	7.0%	2.1%	-9.9%
15	Belgium	9,106	27.2%	6.3%	1.9%	-13.9%
16	Austria	6,976	26.0%	4.8%	1.4%	1.0%
17	Latvia	6,330	43.4%	4.3%	1.3%	3.6%
18	Croatia	5,758	42.2%	4.0%	1.2%	-0.2%
19	Greece	4,822	22.8%	3.3%	1.0%	12.6%
20	Sweden	2,159	14.2%	1.5%	0.4%	-4.4%
21	Denmark	2,071	8.5%	1.4%	0.4%	-2.1%
22	Norway	2,012	27.4%	1.4%	0.4%	-2.1%
23	Luxembourg	1,977	4.1%	1.4%	0.4%	-17.6%
24	Estonia	1,721	37.9%	1.2%	0.3%	-10.9%
25	Switzerland	1,667	12.8%	1.1%	0.3%	7.5%
26	Finland	1,455	11.8%	1.0%	0.3%	-1.6%
27	Ireland	1,260	4.1%	0.9%	0.3%	-16.6%
28	Cyprus	26	2.7%	0.0%	0.0%	-7.1%
TOTAL		491,992	24.9%	0.0%	100.0%	1.0%
			Millions of t.km	Influence in total RFT activity	Influence in the bilateral total	Development 2022/2021
EU 14			213,480	18.0%	43.4%	0.9%
NMS except Malta			274,833	37.6%	55.9%	1.1%
EU 27 except Malta			488,313	25.4%	99.3%	1.0%

Bilateral activity, the main component of international RFT activity, takes +1.0% in 2022. The two main groups, NMS and EU14, are growing at comparable speeds. Some national sectors are dropping out, like Czechia with -6.9% or Belgium with -13.9%, while others manage to stand out, like Hungary with +13.5% or Bulgaria with +18.3%.

CROSS-TRADE RFT - 2022						
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	Development 2022/2021
1	Poland	77,718	20.2%	100.0%	38.0%	4.5%
2	Lithuania	34,661	64.5%	44.6%	16.9%	-4.1%
3	Romania	16,772	26.1%	21.6%	8.2%	-1.4%
4	Bulgaria	11,636	33.1%	15.0%	5.7%	-12.5%
5	Slovenia	9,521	39.2%	12.3%	4.7%	-8.3%
6	Slovakia	9,507	30.2%	12.2%	4.6%	12.4%
7	Portugal	6,782	21.2%	8.7%	3.3%	-0.8%
8	Hungary	6,517	17.4%	8.4%	3.2%	8.0%
9	Czechia	5,592	8.5%	7.2%	2.7%	1.8%
10	Spain	4,454	1.7%	5.7%	2.2%	0.3%
11	Latvia	3,487	23.9%	4.5%	1.7%	-10.9%
12	Netherlands	3,479	5.2%	4.5%	1.7%	-8.7%
13	Luxembourg	3,159	43.0%	4.1%	1.5%	11.3%
14	Germany	2,998	1.0%	3.9%	1.5%	9.1%
15	Croatia	2,711	19.8%	3.5%	1.3%	-1.8%
16	Austria	1,604	6.0%	2.1%	0.8%	-1.3%
17	Belgium	1,063	3.2%	1.4%	0.5%	-18.2%
18	Estonia	,826	18.2%	1.1%	0.4%	-28.8%
19	Italy	770	0.5%	1.0%	0.4%	33.7%
20	Ireland	389	3.1%	0.5%	0.2%	-9.7%
21	France	309	0.2%	0.4%	0.2%	13.6%
22	Switzerland	251	1.9%	0.3%	0.1%	94.6%
23	Finland	167	0.5%	0.2%	0.1%	-15.7%
24	Greece	129	0.6%	0.2%	0.1%	-46.0%
25	Denmark	119	0.8%	0.2%	0.1%	-3.3%
26	Sweden	60	0.1%	0.1%	0.0%	-72.4%
27	Norway	19	0.1%	0.0%	0.0%	280.0%
28	Cyprus	0				
TOTAL		204,700	10.5%	0.0%	100.0%	-0.1%
			Millions of t.km	Influence in total RFT activity	Influence in the cross-trade total	Development 2022/2021
EU 14			25,482	2.1%	12.4%	-0.7%
NMS except Malta			178,948	24.5%	87.4%	0.0%
EU 27 except Malta			204,430	10.6%	99.9%	-0.1%

The significant upward trend observed over the past ten years for international cross-trade activity comes to a halt in 2022. This activity stagnates with a slightly negative result of -0.10%.

In the TOP 5, Poland is the only sector that manages to progress with +4.5%. The others show significant losses, such as the Lithuanian sector with -4.1% or the Bulgarian sector with -12.5%. Conversely, the Luxembourg sector takes +11.3% and its German neighbor +9.1%.

Cross-trade activity is still dominated by two neighboring sectors, Polish and Lithuanian, which together account for 55% of the total. The ranking of the French sector, 21st, does not change and its volume of activity remains marginal, i.e. 0.2% of the pavilion's total activity.

CABOTAGE - 2022						
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 2022/2021
1	Poland	21,751	5.6%	100.0%	43.2%	-12.6%
2	Lithuania	5,674	10.6%	26.1%	11.3%	-11.0%
3	Romania	2,874	4.5%	13.2%	5.7%	-9.7%
4	Spain	2,655	1.0%	12.2%	5.3%	-15.9%
5	Netherlands	1,796	2.7%	8.3%	3.6%	-13.9%
6	Luxembourg	1,594	21.7%	7.3%	3.2%	14.8%
7	Germany	1,510	0.5%	6.9%	3.0%	21.3%
8	Portugal	1,306	4.1%	6.0%	2.6%	3.1%
9	Slovenia	1,300	5.3%	6.0%	2.6%	-6.0%
10	Belgium	1,260	3.8%	5.8%	2.5%	20.2%
11	Bulgaria	1,192	3.4%	5.5%	2.4%	-15.0%
12	Czechia	1 098	1.7%	5.0%	2.2%	-1.8%
13	Hungary	987	2.6%	4.5%	2.0%	12.4%
14	Slovakia	952	3.0%	4.4%	1.9%	-10.7%
15	Italy	826	0.5%	3.8%	1.6%	20.9%
16	Latvia	775	5.3%	3.6%	1.5%	-23.7%
17	Austria	685	2.6%	3.1%	1.4%	-7.7%
18	France	601	0.3%	2.8%	1.2%	-4.0%
19	Ireland	337	2.7%	1.5%	0.7%	-2.6%
20	Croatia	335	2.5%	1.5%	0.7%	13.6%
21	Switzerland	202	1.6%	0.9%	0.4%	21.0%
22	Estonia	196	4.3%	0.9%	0.4%	-43.4%
23	Finland	158	0.5%	0.7%	0.3%	-39.0%
24	Denmark	129	0.9%	0.6%	0.3%	30.3%
25	Sweden	68	0.1%	0.3%	0.1%	-25.3%
26	Greece	47	0.2%	0.2%	0.1%	-6.0%
27	Norway	13	0.1%	0.1%	0.0%	-23.5%
28	Cyprus	0				
TOTAL		50,321	2.6%	0.0%	100.0%	-8.9%
			Millions of t.km	Influence in total RFT activity	Influence in the cabotage total	Development 2022/2021
EU 14			13,733	1.1%	25.8%	-0.9%
NMS except Malta			37,134	5.1%	73.8%	-11.5%
EU 27 except Malta			50,867	2.6%	99.6%	-8.9%

After an exceptional increase of +11.2% between 2019 and 2021, cabotage declines in 2022 with -8.9%. The activity of the TOP 5 is regressing sharply. Other countries are growing but with very low volumes of activity which are not enough to reverse the overall trend.

It should be noted as well that this activity is mainly dominated by the Polish sector which alone accounts for more than 43% of the total. Cabotage under the Lithuanian flag, second in the ranking, is 4 times less.

Conclusion

The annual European RFT ranking follows the trend in the evolution of the RFT market as a whole. In 2022, statistics show a stagnant RFT market but two important events should be remembered: the outbreak of war in Ukraine and the entry into force of the mobility package.

In Western Europe, EU14 succeeds in protecting its activity in this complicated context. Some large historic national sectors are improving their international performance (Spain, Italy, France).

In Eastern Europe, the Baltic countries, direct neighbors of Russia and Belarus with which the EU has significantly reduced its trade, are negatively impacted. Note that the CNR indicated in its economic studies an important competitive factor for these national sectors: the supply of low-cost fuel outside the EU, particularly in Russia. With this advantage now lost, these three sectors are losing significant market share compared to their central European counterparts. Over this period, the leading Polish sector remained stalled.

Overall, the NMS are declining in international activity, but often compensate the loss with the vivacity of their domestic market. Is this a sign of maturity of the economy of these states? Anyhow, a structural change seems to be taking shape for the European RFT.

Definitions

Europe: EU27 - Malta + Norway + Switzerland

UE 27: All Members of the European Union in 2021.

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.