



Comité National Routier

March 2026

2024 European RFT Ranking

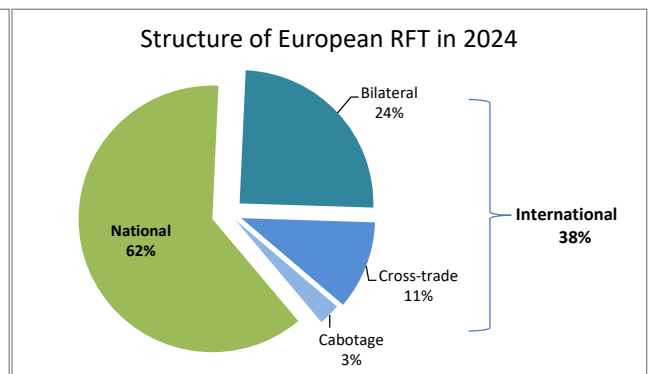
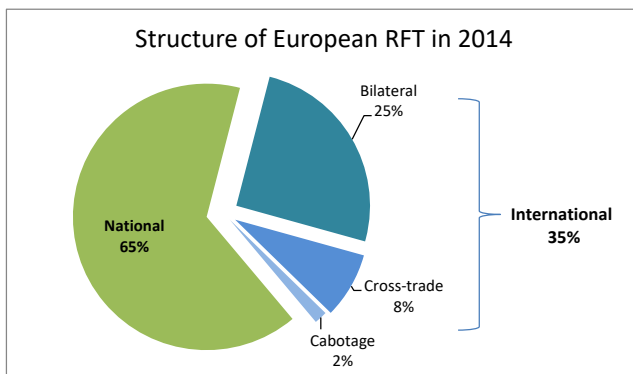
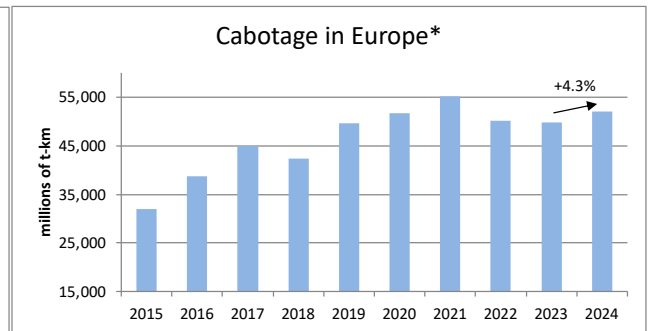
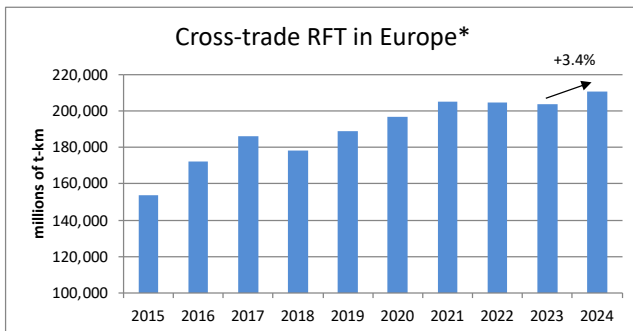
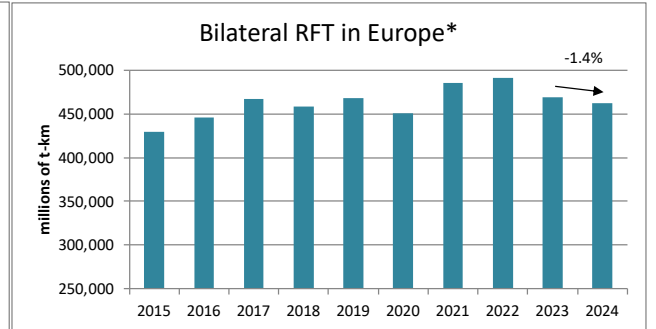
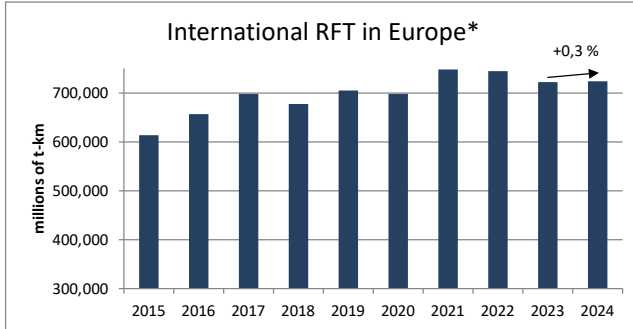
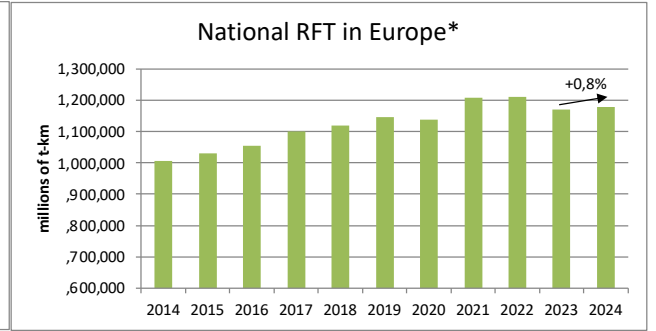
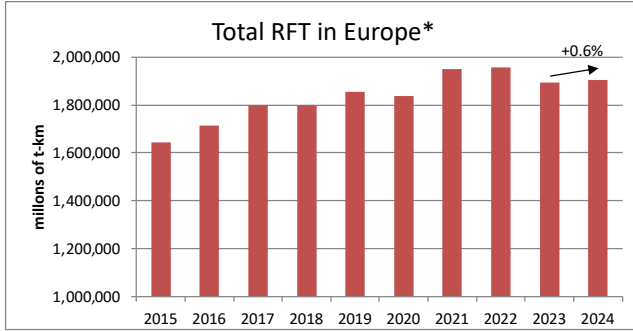
Slight Growth Driven by Domestic Transport and Western European Flags

After the significant decline in 2023, European road freight transport saw a slight increase of +0.6% in 2024. Both domestic and international transport experienced moderate growth overall. With an increase of +0.8%, domestic transport performed better than international transport, which saw +0.3%. Most international sub-sectors showed positive results, with the exception of bilateral transport, which declined by -1.4% in 2024, following a negative result in 2023 (-4.5%). Cross-trade transport and cabotage, therefore, drove international growth, indicating the increasing europeanization of road freight transport. Two flag holders, Polish and Lithuanian, account for more than 58% of cross-trade transport and cabotage in Europe.

Two major European road freight carriers, Germany and Poland, are experiencing a slowdown, each for different reasons, but they are influencing the overall statistics. For both countries, the decline affects both domestic and international markets.

In 2024, Western European carriers are performing better than those of the new member states (NMS). Two explanations are possible. The war in Ukraine is having a more profound impact on Eastern European carriers. These carriers are also seeing their competitive advantage erode due to a significant increase in costs, particularly social costs, as shown by CNR's country studies.

With Europe's economic engine having shifted southward, the strong performance of Spain and Italy is not surprising. The French sector also had a good year (+2.8%), thanks to the growth of its international activity. In Eastern Europe, the Polish leader may have reached its limits several years ago. Its Czech, Slovak and Lithuanian neighbors are gaining market share, but without managing to dethrone the leader.



*See definitions on page 9

ALL ROAD FREIGHT TRANSPORT ACTIVITY PER FLAG - 2024

Rank	Flag holder	Millions of t.km Eurostat data	Influence in the total	% compared to the first flag holder	Development 2024/2023	Ratio t.km/GDP
1	Poland	368,314	19.3%	100%	-2,5%	434
2	Germany	280,840	14.7%	76%	-0.2%	65
3	Spain	271,588	14.3%	74%	0.3%	170
4	France	174,015	9.1%	47%	0.3%	60
5	Italy	152,678	8.0%	41%	0.5%	69
6	Czechia	70,346	3.7%	19%	0.9%	219
7	Romania	67,357	3.5%	18%	0.3%	190
8	Lithuania	66,245	3.5%	18%	0.5%	839
9	Netherlands	62,883	3.3%	17%	0.0%	56
10	Sweden	40,938	2.1%	11%	-0.3%	73
11	Hungary	34,231	1.8%	9%	0.3%	166
12	Belgium	32,090	1.7%	8,7%	0.0%	52
13	Slovakia	30,562	1.6%	8,3%	1.6%	235
14	Finland	27,603	1.4%	7,5%	-0.2%	100
15	Bulgaria	26,969	1.4%	7,3%	-1.9%	257
16	Austria	25,315	1.3%	6,9%	0.0%	51
17	Norway	24,047	1.3%	6,5%	-0.1%	52
18	Portugal	23,120	1.2%	6,3%	-1.4%	80
19	Slovenia	21,857	1.1%	5,9%	-0.3%	324
20	Greece	20,574	1.1%	5,6%	0.3%	87
21	Denmark	16,666	0.9%	4,5%	0.2%	42
22	Latvia	14,906	0.8%	4,0%	1.3%	367
23	Croatia	14,325	0.8%	3,9%	0.0%	167
24	Ireland	13,529	0.7%	3,7%	0.7%	24
25	Switzerland	12,268	0.6%	3,3%	0.3%	14
26	Luxembourg	6,364	0.3%	1,7%	-0.9%	74
27	Estonia	4,363	0.2%	1,2%	0.4%	109
28	Cyprus	1,096	0.1%	0,3%	0.7%	32
		0				
TOTAL		1,905,089	100.0%		0.6%	98
			Millions of t.km	Influence in the total	Development 2024/2023	
EU 14			1,148,203	60.3%	0.91%	
NMS except Malta			720,571	37.8%	0.20%	
EU 27 except Malta			1,868,774	98.1%	0.63%	

* Indicator serving to compare the economic specialization of the flag

Poland, the market leader in road freight transport since 2017, loses -2.5% in 2024. The sector is undergoing a consolidation phase and appears to have reached its limits. Rising costs, particularly driver wages, are certainly a contributing factor. Within the top 10, Germany is down -1.9%, a sign of the economic difficulties the country has faced since the outbreak of the war in Ukraine. Spain, France, and Italy are emerging as winners. The Czech Republic is gaining +8.5%, a result that places it in 6th position in 2024, followed by its Romanian and Lithuanian counterparts. Slovakia is posting the strongest growth at +15.9%.

Some sectors are struggling. This is particularly true for Sweden, Finland, Portugal, and Luxembourg in the West, and Bulgaria and Slovenia in the East.

Overall, with +0.9%, the EU14 countries have stronger growth than the new member states. (+0.2%).

DOMESTIC RFT PER FLAG - 2024						
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 2024/2023
1	Germany	248,248	88%	21.0%	100.0%	-2.1%
2	Spain	182,954	67%	15.5%	73.7%	2.7%
3	France	160,705	92%	13.6%	64.7%	2.2%
4	Italy	136,137	89%	11.5%	54.8%	5.7%
5	Poland	131,995	36%	11.2%	53.2%	-2.1%
6	Sweden	39,038	95%	3.3%	15.7%	-3.1%
7	Netherlands	33,622	53%	2.8%	13.5%	1.5%
8	Czechia	29,028	41%	2.5%	11.7%	1.4%
9	Finland	25,845	94%	2.2%	10.4%	-2.4%
10	Romania	24,029	36%	2.0%	9.7%	7.7%
11	Norway	22,389	93%	1.9%	9.0%	-1.0%
12	Belgium	21,048	66%	1.8%	8.5%	-2.2%
13	Austria	16,626	66%	1.4%	6.7%	0.4%
14	Greece	15,044	73%	1.3%	6.1%	1.5%
15	Denmark	14,388	86%	1.2%	5.8%	3.4%
16	Hungary	12,364	36%	1.0%	5.0%	-12.0%
17	Ireland	11,134	82%	0.9%	4.5%	6.6%
18	Bulgaria	10,456	39%	0.9%	4.2%	5.6%
19	Switzerland	10,261	84%	0.9%	4.1%	-0.5%
20	Portugal	7,658	33%	0.6%	3.1%	0.2%
21	Slovakia	7,172	23%	0.6%	2.9%	20.8%
22	Croatia	5,109	36%	0.4%	2.1%	-1.2%
23	Lithuania	4,648	7%	0.4%	1.9%	11.2%
24	Latvia	4,135	28%	0.4%	1.7%	1.9%
25	Slovenia	2,679	12%	0.2%	1.1%	-13.5%
26	Estonia	1,933	44%	0.2%	0.8%	25.8%
27	Cyprus	1 019	93%	0.1%	0.4%	3.3%
28	Luxembourg	467	7%	0.0%	0.2%	-5.3%
TOTAL		1,180,131	61.9%	100.0%		0.8%
			Millions of t.km	Influence of domestic into total RFT	Influence in the total domestic	Development 2024/2023
EU 14			912,914	79.5%	77.4%	1.07%
NMS except Malta			234,372	32.5%	19.9%	-0.13%
EU 27 except Malta			1,147,286	61.4%	97.2%	0.83%

At +0.8%, national activity is recovering after a decline of -3.3% the previous year. The picture is marred by Germany, the top-ranked country, and Poland, fifth in the ranking, which both saw a decrease of -2.1%. At the top of the ranking, Spain, France, and Italy are all progressing. At the bottom of the ranking, Slovakia achieved a result of +20.8%, while its neighbor Hungary lost -12%.

In Eastern Europe, where flag holders tend to specialize more in international than national activities, a few smaller flags are performing well, such as Romania (+7.7%) and Bulgaria (+5.6%).

While national results vary considerably, the EU14 generally outperformed the NMS (New European Markets), +1.07% compared to -0.13%. The EU14's share of national activity increased to 79.5%, compared to 77.1% in 2023.

INTERNATIONAL RFT PER FLAG - 2024						
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 2024/2023
1	Poland	243,065	64.2%	32.6%	100.0%	-2.8%
2	Spain	85,169	32.6%	12.2%	37.5%	4.1%
3	Lithuania	58,923	93.0%	8.5%	26.1%	4.5%
4	Romania	42,935	64.3%	6.0%	18.3%	0.9%
5	Czechia	36,173	58.7%	5.7%	17.5%	14.2%
6	Germany	32,812	11.6%	4.5%	13.8%	-0.7%
7	Netherlands	29,445	46.5%	4.0%	12.4%	-0.7%
8	Slovakia	23,223	76.5%	3.2%	9.9%	14.4%
9	Hungary	20,440	63.9%	3.0%	9.3%	13.3%
10	Slovenia	19,431	87.7%	2.6%	8.1%	-1.3%
11	Italy	19,303	10.8%	2.3%	7.0%	1.1%
12	Bulgaria	19,137	61.2%	2.3%	7.0%	-28.9%
13	Portugal	16,368	66.9%	2.1%	6.5%	-19.2%
14	France	11,927	7.6%	1.8%	5.6%	11.6%
15	Belgium	10,709	34.4%	1.5%	4.7%	3.1%
16	Latvia	9,160	72.3%	1.5%	4.6%	17.8%
17	Croatia	9,145	64.3%	1.3%	3.9%	0.6%
18	Austria	8,854	34.3%	1.2%	3.7%	-1.9%
19	Luxembourg	6,471	92.7%	0.8%	2.5%	-8.9%
20	Greece	5,196	26.9%	0.8%	2.3%	6.4%
21	Estonia	2,657	55.7%	0.3%	1.0%	-8.5%
22	Ireland	2,485	17.7%	0.3%	1.0%	11.8%
23	Denmark	2,143	13.7%	0.3%	1.0%	-8.3%
24	Switzerland	2,103	16.4%	0.3%	0.8%	26.9%
25	Sweden	1,802	4.6%	0.3%	0.8%	-9.7%
26	Finland	1,782	6.4%	0.2%	0.7%	-1.3%
27	Norway	1,581	6.9%	0.2%	0.7%	-7.9%
28	Cyprus	37	7.1%	0.0%	0.0%	110.8%
TOTAL		722,476	38.1%	100.0%		0.3%
			Millions of t.km	Influence of domestic into total RFT	Influence in the total domestic	Development 2024/2023
EU 14			235,399	20.5%	32.5%	0.6%
NMS except Malta			486,005	67.4%	67.0%	0.3%
EU 27 except Malta			721,404	38.6%	99.5%	0.4%

The stagnant result for international activity in 2024, +0.3%, masks significant disparities between countries. In 2024, substantial changes are observed among them. Among the winners, the Czechia (fifth), Slovakia, Hungary, France, and Latvia stand out with increases exceeding +10% in a single year. Poland, the leading flag, stumbles for the second consecutive year with a decline of -2.8%. The biggest losers in 2024 are Bulgaria (-28.9%) and Portugal (-19.2%).

The EU14 and NEM groups follow similar trends. Specifically, the war in Ukraine and the new geopolitical balance it has imposed appear to have reshaped the landscape. CNR country studies also show a sharp increase in costs in Eastern Europe, which is narrowing the competitiveness gap between West and East.

BILATERAL - 2024						
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 2024/2023
1	Poland	133,302	36.2%	100.0%	28.8%	-7.0%
2	Spain	81,033	29.8%	60.8%	17.5%	3.9%
3	Czechia	31,870	45.3%	23.9%	6.9%	15.6%
4	Germany	28,285	10.1%	21.2%	6.1%	-0.3%
5	Netherlands	24,353	38.7%	18.3%	5.3%	-1.0%
6	Romania	23,084	34.3%	17.3%	5.0%	-0.7%
7	Italy	14,956	9.8%	11.2%	3.2%	0.2%
8	Hungary	14,501	42.4%	10.9%	3.1%	0.5%
9	Slovakia	14,044	46.0%	10.5%	3.0%	10.7%
10	France	12,430	7.1%	9.3%	2.7%	11.5%
11	Portugal	10,574	45.7%	7.9%	2.3%	-15.9%
12	Lithuania	10,266	15.5%	7.7%	2.2%	-5.6%
13	Slovenia	9,277	42.4%	7.0%	2.0%	-4.8%
14	Bulgaria	9,101	33.7%	6.8%	2.0%	-26.7%
15	Belgium	8,740	27.2%	6.6%	1.9%	1.6%
16	Austria	6,798	26.9%	5.1%	1.5%	-1.2%
17	Croatia	6,132	42.8%	4.6%	1.3%	3.1%
18	Latvia	5,475	36.7%	4.1%	1.2%	5.1%
19	Greece	5,254	25.5%	3.9%	1.1%	2.4%
20	Denmark	2,020	12.1%	1.5%	0.4%	-11.3%
21	Sweden	1,719	4.2%	1.3%	0.4%	-8.0%
22	Luxembourg	1,715	26.9%	1.3%	0.4%	-6.6%
23	Switzerland	1,689	13.8%	1.3%	0.4%	35.7%
24	Norway	1,635	6.8%	1.2%	0.4%	-4.9%
25	Estonia	1,360	31.2%	1.0%	0.3%	-22.7%
26	Finland	1,356	4.9%	1.0%	0.3%	-0.1%
27	Ireland	1,343	9.9%	1.0%	0.3%	1.8%
28	Cyprus	78	7.1%	0.1%	0.0%	105.3%
		0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL		462,390	24.3%	100.0%	100.0%	-1.4%
			Millions of t.km	Influence in total RFT activity	Influence in the bilateral total	Development 2024/2023
EU 14			200,576	17.5%	43.4%	0.9%
NMS except Malta			255,542	35.5%	55.3%	-4.4%
EU 27 except Malta			456,118	24.4%	98.6%	-2.1%

Bilateral activity, the main component of international trade, declined by -1.4% in 2024. Among the sharpest changes, Poland, the leading country, saw a decrease of 7%, Portugal 15.9%, and Bulgaria 26.7%. Conversely, Czechia experienced a significant improvement with a +15.6% year-on-year increase, as did its Slovakian neighbor, which saw a +10.7% rise. France regained market share with an +11.5% increase, moving into 10th place and overtaking Portugal and Bulgaria.

The largest subcategory of international trade, bilateral trade, made its mark this year with growth of +0.9% for EU14 flags, while NMS flags declined by -4.4%.

CROSS-TRADE RFT - 2024						
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 2024/2023
1	Poland	80,257	21.8%	100.0%	38.1%	2.8%
2	Lithuania	43,672	65.9%	54.4%	20.7%	5.9%
3	Romania	17,524	26.0%	21.8%	8.3%	4.3%
4	Slovenia	8,711	39.9%	10.9%	4.1%	4.5%
5	Slovakia	8,102	26.5%	10.1%	3.8%	18.8%
6	Czechia	8,039	11.4%	10.0%	3.8%	9.8%
7	Bulgaria	6,803	25.2%	8.5%	3.2%	-31.9%
8	Hungary	6,343	18.5%	7.9%	3.0%	54.3%
9	Spain	4,898	1.8%	6.1%	2.3%	5.9%
10	Latvia	4,599	30.9%	5.7%	2.2%	39.8%
11	Portugal	4,190	18.1%	5.2%	2.0%	-25.4%
12	Netherlands	3,089	4.9%	3.8%	1.5%	0.3%
13	Germany	2,972	1.1%	3.7%	1.4%	-0.9%
14	Croatia	2,809	19.6%	3.5%	1.3%	-4.4%
15	Luxembourg	2,799	44.0%	3.5%	1.3%	-12.5%
16	Austria	1,362	5.4%	1.7%	0.6%	-2.2%
17	Belgium	1014	3.2%	1.3%	0.5%	5.2%
18	Estonia	866	19.8%	1.1%	0.4%	20.6%
19	Italy	767	0.5%	1.0%	0.4%	19.7%
20	Ireland	589	4.4%	0.7%	0.3%	24.0%
21	France	304	0.2%	0.4%	0.1%	-2.3%
22	Greece	273	1.3%	0.3%	0.1%	307.5%
23	Switzerland	232	1.9%	0.3%	0.1%	95.0%
24	Finland	111	0.4%	0.1%	0.1%	-35.1%
25	Denmark	96	0.6%	0.1%	0.0%	-8.6%
26	Sweden	88	0.2%	0.1%	0.0%	-33.8%
27	Norway	21	0.1%	0.0%	0.0%	-43.2%
28	Cyprus	0	0.0%	0.0%	0.0%	0.0%
TOTAL		210,530	11.1%		100.0%	3.4%
			Millions of t.km	Influence in total RFT activity	Influence in the cross-trade total	Development 2024/2023
EU 14			23,780	2.0%	10.7%	-5.2%
NMS except Malta			179,625	26.1%	89.2%	4.5%
EU 27 except Malta			203,405	11.3%	99.9%	3.4%

Despite a general stagnation in the road freight transport market in 2024, cross-trade activity continued the significant upward trend observed over the past decade, with a +3.4% increase for the year. Flags of the EU14 are withdrawing from the market. In the Top 10, Spain is the only representative, in 9th place. At national level, three major players—Poland, Lithuania, and Romania—account for 67% of the total, meaning two-thirds of the market is concentrated in the hands of the top three flags, a significant level of concentration. Further down the rankings, substantial changes are visible, but the volumes remain too small to draw any conclusions.

Overall, this activity appears increasingly reserved for the flags of the NMS, which account for more than 89%.

CABOTAGE - 2024						
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 2024/2023
1	Poland	22,761	6.2%	100.0%	43.7%	4.9%
2	Lithuania	7,660	11.6%	33.7%	14.7%	12.5%
3	Romania	2,719	4.0%	11.9%	5.2%	-6.0%
4	Spain	2,703	1.0%	11.9%	5.2%	4.9%
5	Netherlands	1,820	2.9%	8.0%	3.5%	1.8%
6	Czechia	1,410	2.0%	6.2%	2.7%	8.9%
7	Luxembourg	1,383	21.7%	6.1%	2.7%	-3.8%
8	Germany	1,335	0.5%	5.9%	2.6%	-7.0%
9	Belgium	1,288	4.0%	5.7%	2.5%	12.6%
10	Slovakia	1,243	4.1%	5.5%	2.4%	32.5%
11	Slovenia	1,190	5.4%	5.2%	2.3%	-10.9%
12	Hungary	1 023	3.0%	4.5%	2.0%	33.4%
13	Italy	818	0.5%	3.6%	1.6%	1.2%
14	Latvia	698	4.7%	3.1%	1.3%	8.0%
15	Portugal	698	3.0%	3.1%	1.3%	-27.1%
16	Bulgaria	608	2.3%	2.7%	1.2%	-25.8%
17	France	576	0.3%	2.5%	1.1%	21.8%
18	Austria	529	2.1%	2.3%	1.0%	-8.5%
19	Ireland	462	3.4%	2.0%	0.9%	32.4%
20	Finland	291	1.1%	1.3%	0.6%	15.0%
21	Croatia	274	1.9%	1.2%	0.5%	-1.8%
22	Estonia	204	4.7%	0.9%	0.4%	13.3%
23	Denmark	162	1.0%	0.7%	0.3%	57.3%
24	Sweden	93	0.2%	0.4%	0.2%	-8.8%
25	Switzerland	86	0.7%	0.4%	0.2%	-60.4%
26	Greece	4	0.0%	0.0%	0.0%	300.0%
27	Norway	4	0.0%	0.0%	0.0%	-91.1%
28	Cyprus	0	0.0%	0.0%	0.0%	0.0%
TOTAL		52,042	2.7%		100.0%	4.3%
			Millions of t.km	Influence in total RFT activity	Influence in the cabotage total	Development 2024/2023
EU 14			12,162	1.1%	23.4%	1.3%
NMS except Malta			39,790	5.5%	76.5%	5.7%
EU 27 except Malta			51,952	2.8%	99.8%	4.6%

After two consecutive years of decline, cabotage grew by +4.3% in 2024. The market concentration in the hands of the two leading flags, Poland and Lithuania, is striking. Together, they account for over 58% of the European total, a record high. For the other 26 flags, cabotage remains a niche activity, with significant year-to-year fluctuations.

Overall, the NMS saw strong growth of +5.68%, while the EU14 flags posted a +1.29% increase.

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.