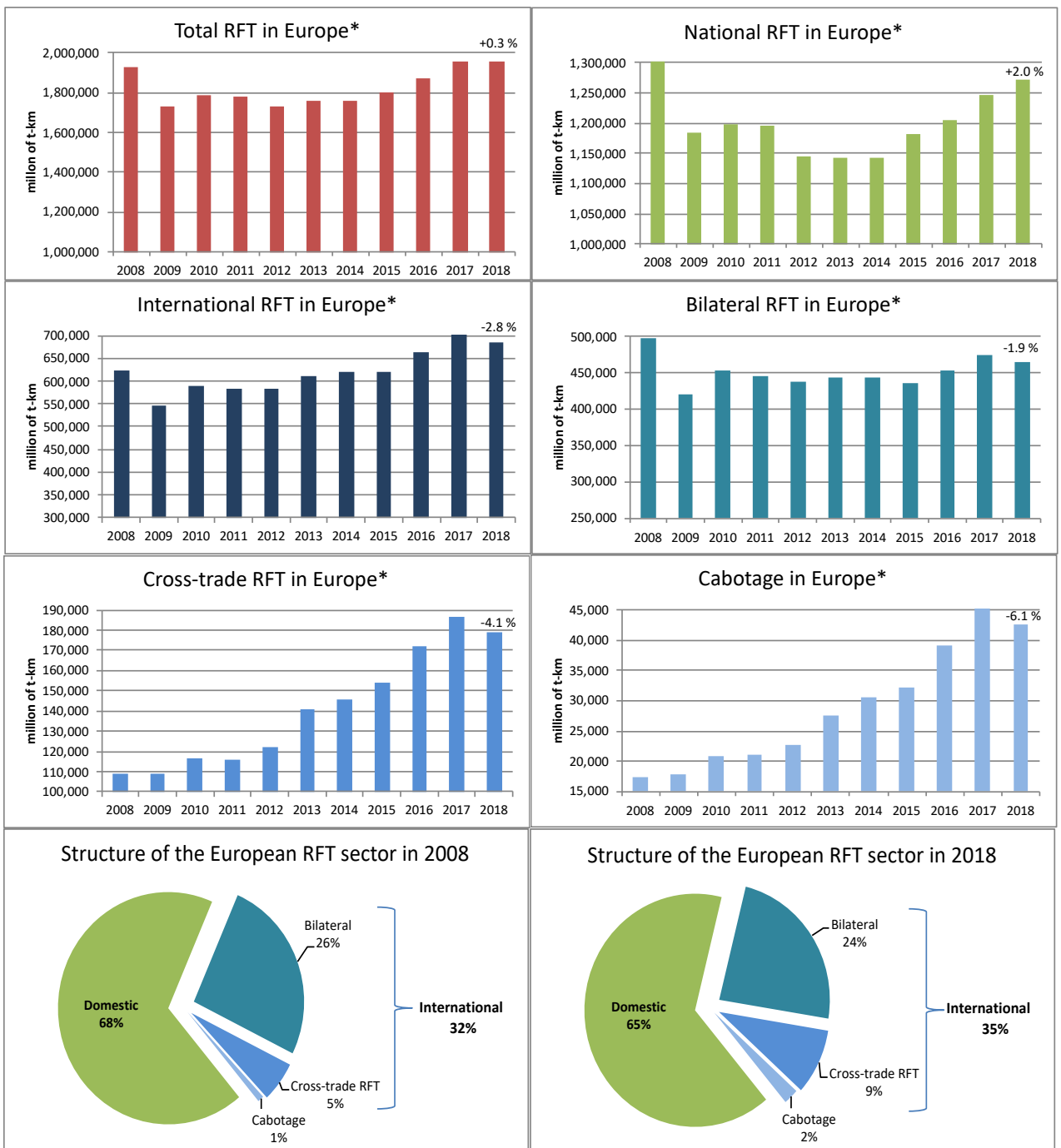


2018 European RFT ranking

The West bounces back

After a short spell at the top of the ranking in 2017, Poland lost ground in 2018 and Germany regained its position as leader of the European RFT sector. Other flags in Eastern Europe suffered the same fate as their Polish counterparts. Conversely, the Western flags have made gains, reversing the trend observed over the past fifteen years. Spain, France and Italy performed well thanks to strong increases in their domestic activity. The Spanish flag also managed to make gains internationally (up +5.8%), particularly in terms of bilateral activity.

Growth in overall domestic activity across all flags slowed down (+2.0% in 2018 versus +3.6% in 2017), while international RFT was down -2.8%. All international RFT sub-categories were affected. For the first time since 2010, cross-trade RFT and cabotage in Europe fell sharply, with most of the Eastern European flags declining.



*See definitions, page 8.

ALL ROAD FREIGHT TRANSPORT ACTIVITY PER FLAG - 2018

Rank	Flag holder	Millions of t.km Eurostat data	Influence in the total	% compared to the first flag holder	Development 2018/2017	Ratio t.km/GDP
1	Germany	316,772	16.2%	100.0%	1.2%	95
2	Poland	315,874	16.1%	99.7%	-5.8%	636
3	Spain	238,994	12.2%	75.4%	3.4%	198
4	France	173,347	8.9%	54.7%	3.4%	74
5	United Kingdom	159,137	8.1%	50.2%	3.4%	66
6	Italy	124,915	6.4%	39.4%	4.4%	71
7	Netherlands	68,876	3.5%	21.7%	2.0%	89
8	Romania	58,762	3.0%	18.6%	7.4%	290
9	Lithuania	43,590	2.2%	13.8%	11.5%	966
10	Sweden	43,478	2.2%	13.7%	3.9%	93
11	Czechia	41,073	2.1%	13.0%	-7.2%	198
12	Hungary	37,948	1.9%	12.0%	-4.4%	288
13	Slovakia	35,586	1.8%	11.2%	0.5%	395
14	Portugal	32,963	1.7%	10.4%	-3.6%	163
15	Belgium	32,683	1.7%	10.3%	-4.5%	73
16	Greece	29,279	1.5%	9.2%	3.2%	159
17	Finland	28,345	1.4%	8.9%	1.4%	122
18	Bulgaria	26,950	1.4%	8.5%	-23.3%	488
19	Austria	25,763	1.3%	8.1%	-0.8%	67
20	Slovenia	22,225	1.1%	7.0%	6.8%	484
21	Norway	21,338	1.1%	6.7%	-0.2%	58
22	Denmark	14,998	0.8%	4.7%	-3.3%	50
23	Latvia	14,997	0.8%	4.7%	0.2%	508
24	Croatia	12,635	0.6%	4.0%	6.8%	245
25	Switzerland	12,500	0.6%	3.9%	4.6%	21
26	Ireland	11,600	0.6%	3.7%	-2.0%	36
27	Luxembourg	6,800	0.3%	2.1%	-16.0%	116
28	Estonia	5,775	0.3%	1.8%	-6.7%	225
29	Cyprus	892	0.0%	0.3%	8.0%	43
TOTAL		1,958,095	100.0%		0.3%	119
			Millions of t.km	Influence in the total	Development 2018/2017	
EU 15			1,307,950	66.8%	2.1%	
NMS except Malta			616,307	31.5%	-3.4%	
EU 28 except Malta			1,924,257	98.3%	0.3%	

* Indicator serving to compare the economic specialization of the flag

The top of the ranking changed for the second consecutive year. Germany regained the top spot, which it had lost in 2017. The Polish flag posted one of its worst results of the decade, -5.8%. The Czech Republic ended 2018 with a -7.2% loss, Hungary fared slightly better (-4.4%), while Bulgaria slumped -23% in the space of one year.

On the other hand, the Western European flags bounced back. All the traditionally strong flags – Germany, Spain, France, the United Kingdom, Italy and the Netherlands – made encouraging comebacks. Belgium was the exception, down -4.5%.

In a 2018 market that was fairly stable market (a one-year growth rate of +0.3%), the EU15 flags posted growth of +2.09% while the new Member States slipped -3.43%.

DOMESTIC RFT PER FLAG - 2018						
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 2018/2017
1	Germany	276,151	87.2%	21.7%	100.0%	1.7%
2	France	161,941	93.4%	12.7%	58.6%	3.9%
3	Spain	158,476	66.3%	12.5%	57.4%	2.5%
4	United Kingdom	151,973	95.5%	11.9%	55.0%	3.1%
5	Poland	114,692	36.3%	9.0%	41.5%	-4.5%
6	Italy	111,741	89.5%	8.8%	40.5%	4.7%
7	Sweden	40,662	93.5%	3.2%	14.7%	5.5%
8	Netherlands	34,295	49.8%	2.7%	12.4%	3.4%
9	Finland	25,970	91.6%	2.0%	9.4%	-1.4%
10	Czechia	23,543	57.3%	1.9%	8.5%	7.5%
11	Belgium	20,591	63.0%	1.6%	7.5%	-0.2%
12	Norway	18,924	88.7%	1.5%	6.9%	1.0%
13	Austria	16,914	65.7%	1.3%	6.1%	0.7%
14	Greece	15,392	52.6%	1.2%	5.6%	-0.5%
15	Romania	14,358	24.4%	1.1%	5.2%	6.0%
16	Hungary	12,979	34.2%	1.0%	4.7%	8.7%
17	Denmark	12,075	80.5%	0.9%	4.4%	-4.0%
18	Switzerland	10,716	85.7%	0.8%	3.9%	4.7%
19	Portugal	10,530	31.9%	0.8%	3.8%	-3.0%
20	Ireland	9,401	81.0%	0.7%	3.4%	0.8%
21	Bulgaria	7,734	28.7%	0.6%	2.8%	-7.1%
22	Slovakia	6,477	18.2%	0.5%	2.3%	2.4%
23	Croatia	4,235	33.5%	0.3%	1.5%	0.9%
24	Lithuania	3,642	8.4%	0.3%	1.3%	14.4%
25	Latvia	3,459	23.1%	0.3%	1.3%	6.8%
26	Slovenia	2,256	10.2%	0.2%	0.8%	-2.3%
27	Estonia	1,686	29.2%	0.1%	0.6%	3.4%
28	Cyprus	865	97.0%	0.1%	0.3%	7.9%
29	Luxembourg	647	9.5%	0.1%	0.2%	-36.4%
TOTAL		1,272,325	65.0%	100.0%		2.0%
		Millions of t.km	Influence of domestic into total RFT	Influence in the total domestic	Development 2018/2017	
EU 15		1,046,759	80.0%	82.3%	2.5%	
NMS except Malta		195,926	31.8%	15.4%	-0.8%	
EU 28 except Malta		1,242,685	64.6%	97.7%	2.0%	

The domestic RFT sector, which grew by +2% in 2018, was driven by the EU15 flags (+2.52%), while new Member States declined -0.77% over the same period.

Among the 10 largest flags in terms of domestic activity, 8 were in West Europe and posted positive growth rates in 2018, with the exception of the Finnish flag which fell -1.4%. The French flag ended the year up +3.9%, with Spain, Germany and Italy up +2.5%, +1.7% and +4.7% respectively. Still at the top of the table, Poland recorded a drop of -4.5% while the Czech Republic grew by +7.5%.

In Eastern Europe, the strong performance of the Lithuanian flag, which recorded +14.4%, as well as that of the Hungarian flag with +8.7%, are deserving of special mention.

INTERNATIONAL RFT PER FLAG - 2018						
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 2018/2017
1	Poland	201,182	63.7%	29.3%	100.0%	-6.5%
2	Spain	80,518	33.7%	11.7%	40.0%	5.3%
3	Romania	44,404	75.6%	6.5%	22.1%	7.9%
4	Germany	40,621	12.8%	5.9%	20.2%	-2.1%
5	Lithuania	39,948	91.6%	5.8%	19.9%	11.2%
6	Netherlands	34,581	50.2%	5.0%	17.2%	0.6%
7	Slovakia	29,109	81.8%	4.2%	14.5%	0.1%
8	Hungary	24,969	65.8%	3.6%	12.4%	-10.0%
9	Portugal	22,433	68.1%	3.3%	11.2%	-3.8%
10	Slovenia	19,969	89.8%	2.9%	9.9%	7.9%
11	Bulgaria	19,216	71.3%	2.8%	9.6%	-28.4%
12	Czechia	17,530	42.7%	2.6%	8.7%	-21.7%
13	Greece	13,887	47.4%	2.0%	6.9%	7.6%
14	Italy	13,174	10.5%	1.9%	6.5%	1.5%
15	Belgium	12,092	37.0%	1.8%	6.0%	-11.0%
16	Latvia	11,538	76.9%	1.7%	5.7%	-1.7%
17	France	11,405	6.6%	1.7%	5.7%	-3.5%
18	Austria	8,849	34.3%	1.3%	4.4%	-3.6%
19	Croatia	8,400	66.5%	1.2%	4.2%	10.0%
20	United Kingdom	7,164	4.5%	1.0%	3.6%	8.7%
21	Luxembourg	6,154	90.5%	0.9%	3.1%	-13.0%
22	Estonia	4,089	70.8%	0.6%	2.0%	-10.3%
23	Denmark	2,923	19.5%	0.4%	1.5%	-0.1%
24	Sweden	2,816	6.5%	0.4%	1.4%	-14.5%
25	Norway	2,414	11.3%	0.4%	1.2%	-8.7%
26	Finland	2,375	8.4%	0.3%	1.2%	45.2%
27	Ireland	2,199	19.0%	0.3%	1.1%	-12.4%
28	Switzerland	1,784	14.3%	0.3%	0.9%	4.4%
29	Cyprus	26	2.9%	0.0%	0.0%	8.3%
TOTAL		685,769	35.0%	100%		-2.8%
			Millions of t.km	Influence of domestic into total RFT	Influence in the total domestic	Development 2018/2017
EU 15			261,191	20.0%	38.1%	0.41%
NMS except Malta			420,380	68.2%	61.3%	-4.62%
EU 28 except Malta			681,571	35.4%	99.4%	-2.75%

International activity fell -2.8%, with the Eastern European flags being the hardest hit (-4.62%). The EU15 flags ended the year virtually flat, with a slight increase of 0.41%.

Among the most active flags, the Poland is still the undisputed leader despite a decline of -6.5% in 2018. Romania performed better and took third place, behind Germany. The international activity of the 4th-ranked German flag ended up barely exceeding that of its Lithuanian counterpart, whose international activity surged more than 11% in 2018.

By contrast, the Hungarian flag lost -10% and the Czech flag collapsed (-21.7%). France dropped a further place in 2018, finishing 17th in the international activity ranking. Despite its progress domestically, the French flag struggled to replicate this success internationally. It is now behind Latvia, a country of less than 2 million inhabitants, with a GDP 80 times lower than that of the French economy.

BILATERAL - 2018						
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 2018/2017
1	Poland	125,633	100.0%	27.1%	39.8%	-7.3%
2	Spain	73,531	58.5%	15.8%	30.8%	5.8%
3	Germany	35,802	28.5%	7.7%	11.3%	-2.1%
4	Netherlands	28,783	22.9%	6.2%	41.8%	2.5%
5	Romania	20,048	16.0%	4.3%	34.1%	14.1%
6	Slovakia	16,095	12.8%	3.5%	45.2%	7.3%
7	Portugal	15,802	12.6%	3.4%	47.9%	1.4%
8	Hungary	15,265	12.2%	3.3%	40.2%	-6.6%
9	Czechia	14,972	11.9%	3.2%	36.5%	-17.8%
10	Greece	13,818	11.0%	3.0%	47.2%	7.5%
11	Italy	12,070	9.6%	2.6%	9.7%	1.4%
12	Lithuania	11,016	8.8%	2.4%	25.3%	-11.3%
13	France	10,791	8.6%	2.3%	6.2%	-4.2%
14	Belgium	10,073	8.0%	2.2%	30.8%	-8.7%
15	Slovenia	9,685	7.7%	2.1%	43.6%	7.2%
16	Bulgaria	8,572	6.8%	1.8%	31.8%	-15.8%
17	Austria	7,105	5.7%	1.5%	27.6%	-2.9%
18	United Kingdom	6,510	5.2%	1.4%	4.1%	7.5%
19	Latvia	6,339	5.0%	1.4%	42.3%	1.7%
20	Croatia	5,692	4.5%	1.2%	45.0%	14.3%
21	Estonia	2,524	2.0%	0.5%	43.7%	-6.9%
22	Sweden	2,521	2.0%	0.5%	5.8%	-15.0%
23	Denmark	2,506	2.0%	0.5%	16.7%	4.6%
24	Norway	2,400	1.9%	0.5%	11.2%	-9.1%
25	Finland	1,981	1.6%	0.4%	7.0%	54.6%
26	Luxembourg	1,941	1.5%	0.4%	28.5%	-23.7%
27	Ireland	1,456	1.2%	0.3%	12.6%	-14.5%
28	Switzerland	1,381	1.1%	0.3%	11.0%	-3.0%
29	Cyprus	26	0.0%	0.0%	2.9%	8.3%
TOTAL		464,338	100.0%	23.7%	-1.9%	
			Millions of t.km	Influence in total RFT activity	Influence in the bilateral total	Development 2018/2017
EU 15			224,690	17.2%	48.4%	1.7%
NMS except Malta			235,867	38.3%	50.8%	-5.0%
EU 28 except Malta			460,557	23.9%	99.2%	-1.9%

Consistent with the figures for international activity, bilateral activity was down -1.9%. However, the results were less negative than in the other two sub-categories. The poor performance of the Polish and German flags (-7.3% and -2.1% respectively) seems to have been counterbalanced by the increase in bilateral activity in Spain (+5.8%), the Netherlands (+2.5%) and Romania (+14%).

Overall, the EU15 flags grew by +1.66% in terms of the most conventional international activity (i.e. bilateral activity), while new Member States posted a significant decline of -5%.

CROSS-TRADE RFT - 2018						
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 2018/2017
1	Poland	58,911	100.0%	32.9%	18.7%	-4.6%
2	Lithuania	25,047	42.5%	14.0%	57.5%	19.7%
3	Romania	20,631	35.0%	11.5%	35.1%	4.9%
4	Slovakia	11,750	19.9%	6.6%	33.0%	-7.5%
5	Bulgaria	9,626	16.3%	5.4%	35.7%	-33.5%
6	Slovenia	9,294	15.8%	5.2%	41.8%	10.5%
7	Hungary	8,634	14.7%	4.8%	22.8%	-15.2%
8	Portugal	5,518	9.4%	3.1%	16.7%	-13.9%
9	Latvia	4,278	7.3%	2.4%	28.5%	-4.3%
10	Spain	4,268	7.2%	2.4%	1.8%	2.6%
11	Netherlands	3,848	6.5%	2.2%	5.6%	-11.3%
12	Germany	3,287	5.6%	1.8%	1.0%	0.7%
13	Luxembourg	3,007	5.1%	1.7%	44.2%	-4.1%
14	Croatia	2,522	4.3%	1.4%	20.0%	1.0%
15	Czechia	2,094	3.6%	1.2%	5.1%	-40.8%
16	Austria	1,195	2.0%	0.7%	4.6%	-13.6%
17	Estonia	1,175	2.0%	0.7%	20.3%	-21.8%
18	Belgium	1,057	1.8%	0.6%	3.2%	-13.8%
19	Italy	507	0.9%	0.3%	0.4%	-17.2%
20	Ireland	500	0.8%	0.3%	4.3%	-1.0%
21	United Kingdom	431	0.7%	0.2%	0.3%	91.6%
22	Finland	272	0.5%	0.2%	1.0%	75.5%
23	Denmark	241	0.4%	0.1%	1.6%	-23.2%
24	France	235	0.4%	0.1%	0.1%	-13.9%
25	Sweden	211	0.4%	0.1%	0.5%	6.6%
26	Switzerland	204	0.3%	0.1%	1.6%	53.4%
27	Greece	69	0.1%	0.0%	0.2%	43.8%
28	Norway	7	0.0%	0.0%	0.0%	0.0%
29	Cyprus	0	0.0%	0.0%	0.0%	0.0%
TOTAL		178,819	100.0%	9.1%	-4.1%	
			Millions of t.km	Influence in total RFT activity	Influence in the cross-trade total	Development 2018/2017
EU 15			24,646	1.9%	13.8%	-6.1%
NMS except Malta			153,962	25.0%	86.1%	-3.8%
EU 28 except Malta			178,608	9.3%	99.9%	-4.1%

After 10 years of uninterrupted growth, cross-trade RFT activity fell -4.1% in 2018. New Member States (down -3.83%) fared better than EU15 flags, which lost -6.11%. The significant losses of the Polish (-4.6%), Bulgarian (-33.5%), Hungarian (-15.2%) and Czech (-40.8%) flags may herald a reversal of the trend observed for more than a decade. The shortage of drivers, which is forcing hauliers to accept more frequent returns to base, seems to be primarily having a negative effect on this cross-trade RFT activity where long-distance trips are required.

Other sectors in Eastern Europe were still doing well: Lithuania was up +20%, Romania +5% and Slovenia +11%.

CABOTAGE - 2018						
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 2018/2017
1	Poland	16,637	100.0%	39.0%	5.3%	-7.0%
2	Lithuania	3,885	23.4%	9.1%	8.9%	51.3%
3	Romania	3,725	22.4%	8.7%	6.3%	-5.0%
4	Spain	2,719	16.3%	6.4%	1.1%	-2.2%
5	Netherlands	1,951	11.7%	4.6%	2.8%	-0.4%
6	Germany	1,532	9.2%	3.6%	0.5%	-7.7%
7	Slovakia	1,263	7.6%	3.0%	3.5%	-8.9%
8	Luxembourg	1,206	7.2%	2.8%	17.7%	-13.7%
9	Portugal	1,112	6.7%	2.6%	3.4%	-17.1%
10	Hungary	1,069	6.4%	2.5%	2.8%	-12.9%
11	Bulgaria	1,018	6.1%	2.4%	3.8%	-52.9%
12	Slovenia	991	6.0%	2.3%	4.5%	-6.4%
13	Belgium	962	5.8%	2.3%	2.9%	-27.5%
14	Latvia	921	5.5%	2.2%	6.1%	-10.5%
15	Italy	597	3.6%	1.4%	0.5%	28.4%
16	Austria	549	3.3%	1.3%	2.1%	14.6%
17	Czechia	464	2.8%	1.1%	1.1%	-24.4%
18	Estonia	390	2.3%	0.9%	6.8%	13.4%
19	France	379	2.3%	0.9%	0.2%	34.4%
20	Ireland	243	1.5%	0.6%	2.1%	-20.1%
21	United Kingdom	223	1.3%	0.5%	0.1%	-27.8%
22	Switzerland	199	1.2%	0.5%	1.6%	30.9%
23	Croatia	186	1.1%	0.4%	1.5%	15.5%
24	Denmark	176	1.1%	0.4%	1.2%	-18.5%
25	Finland	122	0.7%	0.3%	0.4%	-39.3%
26	Sweden	83	0.5%	0.2%	0.2%	-36.2%
27	Norway	7	0.0%	0.0%	0.0%	75.0%
28	Greece	0	0.0%	0.0%	0.0%	0.0%
29	Cyprus	0	0.0%	0.0%	0.0%	0.0%
TOTAL		42,609	100.0%	2.2%	-6.1%	
			Millions of t.km	Influence in total RFT activity	Influence in the cabotage total	Development 2018/2017
EU 15			11,854	0.9%	27.8%	-7.8%
NMS except Malta			30,549	5.0%	71.7%	-5.6%
EU 28 except Malta			42,403	2.2%	99.5%	-6.2%

As regards cabotage, the situation was similar to that observed in terms of cross-trade RFT activity, with an even more marked drop-off (-6.1%). Most of the flags were declining in both Eastern and the Western Europe, with the exception of Lithuania and Italy. Since activity volumes were extremely low, fluctuations in the individual flags were extremely pronounced, but the overall trend remains negative.

Conclusion

While 2017 was perfectly in line with the positive but slow trend observed since the end of the 2008 economic crisis, by contrast 2018 seems to mark a reversal. After more than a decade of sustained growth, new Member State flags endured significant declines on all fronts. Some Eastern European flags seem to be reaching maturity, losing market share internationally and gaining ground in terms of domestic activity. By contrast, the EU15 flags were doing better overall.

Since 2017, CNR studies have revealed a sharp increase in costs among Eastern European hauliers. The shortage of drivers, combined with labour demands, is weakening flags involved in direct competition internationally, particularly in terms of cabotage and cross-trade RFT activity. Otherwise, the traditionally strong flags have been doing better thanks to their domestic and bilateral activities.

The political success of Western European countries in changing European RFT regulations in early 2020 may seal (or even accentuate) this loss of momentum among Eastern European flags beyond 2020. Watch this space.

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 according to the version available in March 2020, supplemented 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.