

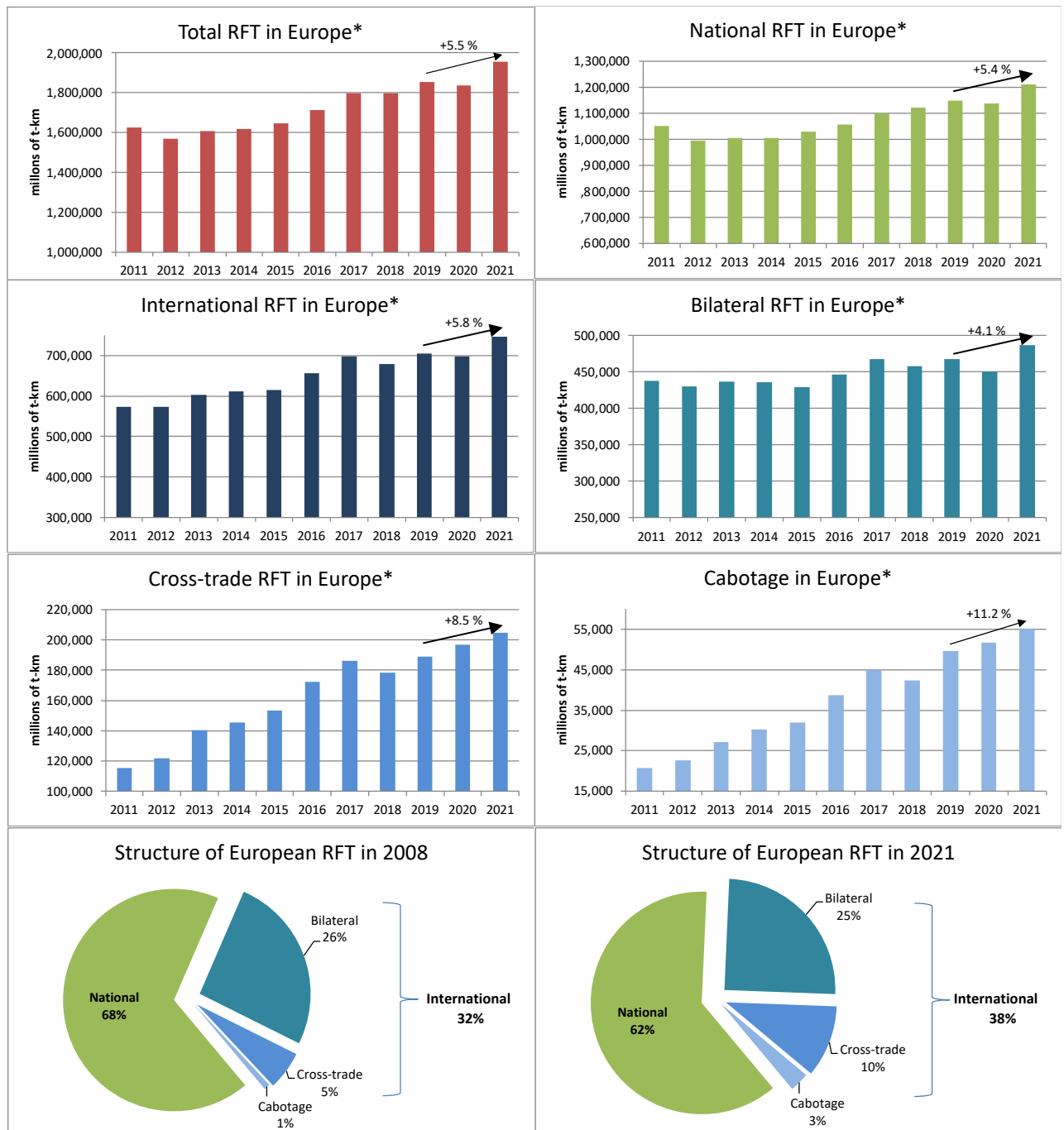
# 2021 European RFT ranking

## Post-Covid recovery underway

Due to the exceptional circumstances of 2020, the CNR decided to wait for the publication of the final statistical data for 2021 before resuming publication of its annual ranking of European road haulage sectors.

The 2021 figures show an upturn in RFT activity. Between 2019 and 2021, the market grew by 5.5%, with both domestic and international activity enjoying gains. Internationally, while bilateral activity increased at a slower pace, cross-trade was up 8.5%, with cabotage posting a growth rate of 11.2%.

Overall, the European RFT sector is becoming more international, with domestic activity declining by 6 points in market share since 2008, as international business, particularly cabotage, has been gaining ground. Over the same period, cross-trade increased twofold, and cabotage tripled. The major beneficiaries of the post-Covid recovery have been Eastern European RFT sectors.



\*See definitions on page 8

### ALL ROAD FREIGHT TRANSPORT ACTIVITY PER FLAG - 2021

Rank	Flag holder	Millions of t.km Eurostat data	Influence in the total	% compared to the first flag holder	Development 2021/2019	Ratio t.km/GDP
1	Poland	379,820	19.4%	100.0%	8.8%	661
2	Germany	307,272	15.7%	80.9%	-1.5%	85
3	Spain	270,176	13.8%	71.1%	8.3%	224
4	France	174,853	8.9%	46.0%	0.5%	70
5	Italy	144,986	7.4%	38.2%	5.1%	81
6	Netherlands	70,228	3.6%	18.5%	1.9%	82
7	Czechia	63,756	3.3%	16.8%	63.2%	268
8	Romania	61,849	3.2%	16.3%	1.3%	256
9	Lithuania	57,755	3.0%	15.2%	8.7%	1028
10	Sweden	47,485	2.4%	12.5%	11.5%	88
11	Hungary	37,101	1.9%	9.8%	0.4%	241
12	Belgium	36,175	1.8%	9.5%	3.9%	72
13	Bulgaria	35,130	1.8%	9.2%	70.9%	494
14	Portugal	32,050	1.6%	8.4%	3.3%	149
15	Slovakia	30,183	1.5%	7.9%	-11.1%	306
16	Finland	29,618	1.5%	7.8%	2.7%	118
17	Austria	27,282	1.4%	7.2%	3.2%	67
18	Slovenia	24,968	1.3%	6.6%	4.0%	478
19	Norway	22,553	1.2%	5.9%	5.1%	54
20	Greece	21,053	1.1%	5.5%	-25.3%	116
21	Denmark	15,342	0.8%	4.0%	2.3%	46
22	Latvia	15,103	0.8%	4.0%	0.9%	448
23	Croatia	13,629	0.7%	3.6%	9.2%	234
24	Switzerland	12,698	0.6%	3.3%	2.4%	19
25	Ireland	12,493	0.6%	3.3%	0.4%	29
26	Luxembourg	6,904	0.4%	1.8%	-6.5%	95
27	Estonia	5,237	0.3%	1.4%	9.2%	167
28	Cyprus	731	0.0%	0.2%	-14.8%	30
<b>TOTAL</b>		<b>1,956,430</b>	<b>100.0%</b>		<b>5.5%</b>	<b>125</b>
			Millions of t.km	Influence in the total	Development 2021/2019	
EU 14			1,195,917	66.1%	2.29%	
NMS except Malta			725,262	37.1%	11.46%	
EU 27 except Malta			1,921,179	98.2%	5.57%	

\* Indicator serving to compare the economic specialization of the flag

Poland continues to be the European RFT market leader thanks to an 8.8% increase in activity between 2019 and 2021. Meanwhile, the German sector contracted by 1.5% and is now facing competition for second place from Spain, which, thanks to a growth rate of 8.3%, posted a performance on a par with that of Poland. The French and Italian sectors round out the Top 5.

Overall, the European RFT sector grew by 5.5% over this two-year period. However, not all national sectors reported growth. Between 2019 and 2021, Slovakia contracted by 11.1%, mainly due to the increase in costs, and Luxembourg also suffered (-6.5%) due in all likelihood to the "nationalisation" of freight transport operations in France and Belgium during the Covid crisis. The decline in tourism had a significant impact on the Greek and Cypriot sectors.

The figures for the Czech Republic and Bulgaria reflect a change in methodology and, as a consequence, we will abstain from discussing them.

DOMESTIC RFT PER FLAG - 2021						
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 2021/2019
1	Germany	272,000	88.5%	22.5%	100.0%	-0.7%
2	Spain	182,466	67.5%	15.1%	67.1%	10.0%
3	France	162,574	93.0%	13.4%	59.8%	0.0%
4	Poland	134,730	35.5%	11.1%	49.5%	12.9%
5	Italy	128,547	88.7%	10.6%	47.3%	4.9%
6	Sweden	44,776	94.3%	3.7%	16.5%	11.6%
7	Netherlands	36,446	51.9%	3.0%	13.4%	2.9%
8	Czechia	29,764	46.7%	2.5%	10.9%	19.0%
9	Finland	27,652	93.4%	2.3%	10.2%	3.5%
10	Belgium	23,257	64.3%	1.9%	8.6%	7.0%
11	Romania	20,458	33.1%	1.7%	7.5%	22.7%
12	Norway	20,415	90.5%	1.7%	7.5%	5.2%
13	Austria	18,011	66.0%	1.5%	6.6%	4.4%
14	Greece	16,482	78.3%	1.4%	6.1%	7.8%
15	Hungary	14,778	39.8%	1.2%	5.4%	10.4%
16	Denmark	12,863	83.8%	1.1%	4.7%	5.7%
17	Switzerland	10,849	85.4%	0.9%	4.0%	2.5%
18	Ireland	10,238	81.9%	0.8%	3.8%	2.4%
19	Portugal	9,389	29.3%	0.8%	3.5%	-9.8%
20	Bulgaria	9,029	25.7%	0.7%	3.3%	57.9%
21	Slovakia	6,295	20.9%	0.5%	2.3%	-6.5%
22	Croatia	4,802	35.2%	0.4%	1.8%	11.4%
23	Latvia	4,064	26.9%	0.3%	1.5%	21.3%
24	Lithuania	3,862	6.7%	0.3%	1.4%	8.6%
25	Slovenia	2,464	9.9%	0.2%	0.9%	6.9%
26	Estonia	1,800	34.4%	0.1%	0.7%	5.3%
27	Cyprus	703	96.2%	0.1%	0.3%	-15.4%
28	Luxembourg	621	9.0%	0.1%	0.2%	-6.1%
<b>TOTAL</b>		<b>1,209,335</b>	<b>61.8%</b>	<b>100.0%</b>		<b>5.4%</b>
			Millions of t.km	Influence of domestic into total RFT	Influence in the total domestic	Development 2021/2019
EU 15			945,322	79.0%	78.2%	3.35%
NMS except Malta			232,749	32.1%	19.2%	14.68%
EU 28 except Malta			1,178,071	61.3%	97.4%	5.41%

Domestic activity reflected the overall trend, with an increase of 5.4%, boosted by the exceptional performance of new Member States (+14.68%). Long considered the Achilles heel of these new Member States, growth in domestic business was mainly driven by the Polish (+12.9%), Romanian (+22.7%) and Hungarian sectors (+10.4%).

Among the older EU Member States, Spain, Italy and Sweden all enjoyed growth (10.0%, 4.9% and 11.6%, respectively), with the French sector standing still and the Dutch and Finnish sectors posting growth figures below the European average. Domestic activity in the Portuguese sector fell by nearly 10% while that of Slovakia fell by 6.5%.

The EU14's share of domestic business is around 80%, while its share of overall business is only 61% (see previous page). This is further evidence of the fact that these national sectors are heavily focused on their domestic markets.

## INTERNATIONAL RFT PER FLAG - 2021

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 2021/2019
1	Poland	245 090	64.5%	32.8%	100.0%	6.8%
2	Spain	87 710	32.5%	11.7%	35.8%	4.9%
3	Lithuania	53 894	93.3%	7.2%	22.0%	8.7%
4	Romania	41 391	66.9%	5.5%	16.9%	-6.7%
5	Germany	35 272	11.5%	4.7%	14.4%	-6.8%
6	Czechia	33 992	53.3%	4.5%	13.9%	142.0%
7	Netherlands	33 782	48.1%	4.5%	13.8%	0.8%
8	Bulgaria	26 101	74.3%	3.5%	10.6%	76.0%
9	Slovakia	23 888	79.1%	3.2%	9.7%	-12.2%
10	Portugal	22 661	70.7%	3.0%	9.2%	10.0%
11	Slovenia	22 504	90.1%	3.0%	9.2%	3.7%
12	Hungary	22 323	60.2%	3.0%	9.1%	-5.3%
13	Italy	16 439	11.3%	2.2%	6.7%	6.1%
14	Belgium	12 918	35.7%	1.7%	5.3%	-1.4%
15	France	12 280	7.0%	1.6%	5.0%	6.3%
16	Latvia	11 040	73.1%	1.5%	4.5%	-5.0%
17	Austria	9 271	34.0%	1.2%	3.8%	0.8%
18	Croatia	8 826	64.8%	1.2%	3.6%	8.1%
19	Luxembourg	6 283	91.0%	0.8%	2.6%	-6.5%
20	Greece	4 571	21.7%	0.6%	1.9%	-64.6%
21	Estonia	3 437	65.6%	0.5%	1.4%	11.4%
22	Sweden	2 709	5.7%	0.4%	1.1%	8.7%
23	Denmark	2 479	16.2%	0.3%	1.0%	-12.3%
24	Ireland	2 255	18.1%	0.3%	0.9%	-7.7%
25	Norway	2 138	9.5%	0.3%	0.9%	3.6%
26	Finland	1 966	6.6%	0.3%	0.8%	-8.0%
27	Switzerland	1 848	14.6%	0.2%	0.8%	1.7%
28	Cyprus	28	3.8%	0.0%	0.0%	3.7%
<b>TOTAL</b>		<b>747 096</b>	<b>38.2%</b>	<b>100.0%</b>		<b>5.8%</b>
		Millions of t.km	Influence of domestic into total RFT	Influence in the total domestic	Development 2021/2019	
EU 14		250 596	21.0%	33.5%	-1.53%	
NMS except Malta		492 514	67.9%	65.9%	9.99%	
EU 27 except Malta		743 110	38.7%	99.5%	5.82%	

International activity grew at a steady pace with an increase of 5.8% over this two-year period. However, not all sectors fared equally well. The EU14 group of countries declined by 1.53% over the same period, while new Member States posted a growth rate of 10%, a figure that is doubtless inflated due to the fact that Czech and Bulgarian data could not be taken into account.

Poland consolidated its position at the top of the ranking thanks to a growth rate of 6.8%, while its German neighbour suffered a decline of almost exactly the same amount. The second-placed Spanish sector grew by 4.9%, but can now only muster a third of the Polish sector's business volumes. Lithuania, with a growth rate of 8.7%, is in third place, followed by Romania, which experienced a decline of 6.8%. France rose from 17<sup>th</sup> position in 2018 to 15<sup>th</sup> position in 2021 thanks to growth in its international activity of 6.3%. In terms of international business, however, the French sector achieved barely 5% of the business volume of the Polish sector and a third of that of the German sector.

BILATERAL - 2021						
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 2021/2019
1	Poland	145,824	38.4%	100.0%	29.9%	2.8%
2	Spain	80,114	29.7%	54.9%	16.4%	4.6%
3	Germany	31,280	10.2%	21.5%	6.4%	-4.9%
4	Netherlands	27,887	39.7%	19.1%	5.7%	1.0%
5	Czechia	27,382	42.9%	18.8%	5.6%	134.1%
6	Romania	21,193	34.3%	14.5%	4.4%	3.8%
7	Hungary	15,413	41.5%	10.6%	3.2%	-0.5%
8	Italy	15,180	10.5%	10.4%	3.1%	4.9%
9	Portugal	14,558	45.4%	10.0%	3.0%	5.1%
10	Slovakia	14,360	47.6%	9.8%	2.9%	-9.5%
11	Bulgaria	11,403	32.5%	7.8%	2.3%	74.0%
12	France	11,382	6.5%	7.8%	2.3%	3.9%
13	Lithuania	11,382	19.7%	7.8%	2.3%	-12.4%
14	Slovenia	10,744	43.0%	7.4%	2.2%	8.8%
15	Belgium	10,570	29.2%	7.2%	2.2%	2.6%
16	Austria	6,905	25.3%	4.7%	1.4%	-2.9%
17	Latvia	6,110	40.5%	4.2%	1.3%	3.0%
18	Croatia	5,770	42.3%	4.0%	1.2%	5.0%
19	Greece	4,283	20.3%	2.9%	0.9%	-66.4%
20	Sweden	2,400	5.1%	1.6%	0.5%	9.7%
21	Denmark	2,258	14.7%	1.5%	0.5%	-7.3%
22	Norway	2,115	9.4%	1.5%	0.4%	9.5%
23	Luxembourg	2,056	29.8%	1.4%	0.4%	-5.1%
24	Estonia	1,931	36.9%	1.3%	0.4%	13.3%
25	Switzerland	1,551	12.2%	1.1%	0.3%	7.0%
26	Finland	1,510	5.1%	1.0%	0.3%	-4.2%
27	Ireland	1,479	11.8%	1.0%	0.3%	-7.9%
28	Cyprus	28	3.8%	0.0%	0.0%	7.7%
<b>TOTAL</b>		<b>487,068</b>	<b>24.9%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>4.1%</b>
			Millions of t.km	Influence in total RFT activity	Influence in the bilateral total	Development 2021/2019
EU 14			211,862	17.7%	43.5%	-2.12%
NMS except Malta			271,540	37.4%	55.7%	9.55%
EU 27 except Malta			483,402	25.2%	99.2%	4.11%

Bilateral business, the main component of international RFT activity, rose by 4.1% over the two-year period in question. Overall, the new Member States were the main beneficiaries of this growth (+9.55%), compared with an overall drop of 2.12% among the EU14 sectors.

Over the period 2019-2021, the top-ranked Polish sector grew by 2.8%, followed by Spain, up 4.6%. Activity in the German sector fell by 4.9%. Other sectors also experienced significant declines: e.g. Slovakia (-9.5%) and Lithuania (-12.4%). Meanwhile, the French sector posted a growth rate of 3.9%. The volume of its bilateral international activity is now identical to that of Lithuania, but represents only 7.8% of that of Poland.

CROSS-TRADE RFT - 2021						
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 2021/2019
1	Poland	74,384	19.6%	100.0%	36.3%	11.4%
2	Lithuania	36,135	62.6%	48.6%	17.6%	14.8%
3	Romania	17,015	27.5%	22.9%	8.3%	-14.4%
4	Bulgaria	13,296	37.8%	17.9%	6.5%	87.1%
5	Slovenia	10,378	41.6%	14.0%	5.1%	-1.8%
6	Slovakia	8,461	28.0%	11.4%	4.1%	-16.9%
7	Portugal	6,836	21.3%	9.2%	3.3%	20.9%
8	Hungary	6,032	16.3%	8.1%	2.9%	-15.8%
9	Czechia	5,492	8.6%	7.4%	2.7%	198.3%
10	Spain	4,440	1.6%	6.0%	2.2%	7.1%
11	Latvia	3,914	25.9%	5.3%	1.9%	-15.2%
12	Netherlands	3,811	5.4%	5.1%	1.9%	-4.1%
13	Luxembourg	2,839	41.1%	3.8%	1.4%	-10.8%
14	Croatia	2,761	20.3%	3.7%	1.3%	14.6%
15	Germany	2,747	0.9%	3.7%	1.3%	-17.0%
16	Austria	1,625	6.0%	2.2%	0.8%	3.4%
17	Belgium	1,300	3.6%	1.7%	0.6%	-8.6%
18	Estonia	1,160	22.2%	1.6%	0.6%	5.7%
19	Italy	576	0.4%	0.8%	0.3%	14.1%
20	Ireland	431	3.4%	0.6%	0.2%	-15.5%
21	France	272	0.2%	0.4%	0.1%	15.3%
22	Greece	239	1.1%	0.3%	0.1%	86.7%
23	Sweden	217	0.5%	0.3%	0.1%	13.0%
24	Finland	198	0.7%	0.3%	0.1%	-31.5%
25	Switzerland	129	1.0%	0.2%	0.1%	-41.6%
26	Denmark	123	0.8%	0.2%	0.1%	-43.8%
27	Norway	5	0.0%	0.0%	0.0%	-95.2%
28	Cyprus	0	0.0%	0.0%	0.0%	0.0%
<b>TOTAL</b>		<b>178,819</b>	<b>10.5%</b>	<b>100.0%</b>	<b>8.5%</b>	
			Millions of t.km	Influence in total RFT activity	Influence in the cross-trade total	Development 2021/2019
EU 14			25,338	2.1%	12.5%	1.25%
NMS except Malta			163,101	24.7%	87.4%	9.77%
EU 27 except Malta			188,439	10.7%	99.9%	8.62%

With regard to international cross-trade, the strong upward trend that emerged over the last ten years is continuing. This activity now accounts for more than 10% of total European RFT business.

The RFT sectors in new Member States, which occupy 8 of the top 10 places in the ranking, are dominant in this area. Among older Member States, only Portugal (7<sup>th</sup>) and Spanish (10<sup>th</sup>) make it into the Top 10.

Cross-trade is dominated by two neighbours, Poland and Lithuania, which together account for 54% of all such activity. Most of the EU14 sectors carry out a negligible amount of cross-trade: for instance, in the case of the French sector, ranked 21<sup>st</sup> in this category, cross-trade accounts for a mere 0.2% of its overall activity.

CABOTAGE - 2021						
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 2021/2019
1	Poland	20,985	6.6%	100.0%	45.1%	18.6%
2	Lithuania	5,110	11.0%	25.6%	11.5%	24.8%
3	Romania	4,083	5.1%	12.8%	5.8%	-22.0%
4	Spain	2,933	1.2%	12.7%	5.7%	7.6%
5	Netherlands	1,939	3.0%	8.4%	3.8%	7.5%
6	Bulgaria	1,173	4.0%	5.6%	2.5%	19.5%
7	Luxembourg	1,368	20.1%	5.6%	2.5%	1.5%
8	Slovenia	1,263	5.5%	5.6%	2.5%	9.5%
9	Portugal	1,094	4.0%	5.1%	2.3%	15.8%
10	Germany	1,654	0.4%	5.0%	2.3%	-24.7%
11	Czechia	,512	1.8%	4.5%	2.0%	118.4%
12	Slovakia	1 149	3.5%	4.3%	1.9%	-7.2%
13	Belgium	1 377	2.9%	4.2%	1.9%	-23.9%
14	Latvia	1 068	6.7%	4.1%	1.8%	-4.9%
15	Hungary	905	2.4%	3.5%	1.6%	-3.0%
16	Austria	513	2.7%	3.0%	1.3%	44.6%
17	Italy	522	0.5%	2.7%	1.2%	30.8%
18	France	361	0.4%	2.5%	1.1%	73.4%
19	Estonia	283	6.6%	1.4%	0.6%	22.3%
20	Ireland	326	2.8%	1.4%	0.6%	6.1%
21	Croatia	261	2.2%	1.2%	0.5%	13.0%
22	Finland	272	0.9%	1.0%	0.5%	-4.8%
23	Switzerland	147	1.3%	0.7%	0.3%	13.6%
24	Denmark	171	0.6%	0.4%	0.2%	-42.1%
25	Sweden	113	0.2%	0.4%	0.2%	-19.5%
26	Greece	54	0.2%	0.2%	0.1%	-7.4%
27	Norway	26	0.1%	0.1%	0.0%	-34.6%
28	Cyprus	0	0.0%	0.0%	0.0%	0.0%
<b>TOTAL</b>		<b>55,215</b>	<b>2.8%</b>	<b>100.0%</b>	<b>11.2%</b>	
			Millions of t.km	Influence in total RFT activity	Influence in the cabotage total	Development 2021/2019
EU 14			13,085	1.1%	23.7%	3.06%
NMS except Malta			41,946	5.8%	76.0%	14.01%
EU 27 except Malta			55,031	2.9%	99.7%	11.20%

The remaining element of international activity, cabotage, posted very strong growth (+11.2%) over this two-year period. This activity is largely dominated by Poland; thanks to growth of 18.6% since 2019, the Polish sector now accounts for almost half of all European cabotage. Cabotage in the second-ranked Lithuanian sector rose by approximately 25%

## Conclusion

This ranking, which due to exceptional circumstances focuses on a two-year period, reveals steady growth across all areas of European RFT activity. This growth is no longer confined to international operations, but is also being felt at domestic level in all geographical zones, with the exception of a handful of countries.

While the period before the Covid pandemic had seen a downturn in the activity of Eastern European companies, which were losing ground to their Western counterparts, Eastern European firms have fared better during the post-pandemic recovery. As a result, their activity is growing across all areas, with an above-average increase when it comes to international business. A handful of new Member States now dominate cross-trade and cabotage. There is growing market dominance in this respect: two national sectors out of 28 (those of Poland and Lithuania) now carry out more than half of all cross-trade and cabotage business in Europe. In purely economic terms, this level of market dominance is a cause for concern.

The significant increase in their costs since 2017, exacerbated by the introduction of measures in several Western European countries to tighten control over this international activity, as well as the shortage of drivers, does not seem to have weakened their overall position in the RFT market. Nevertheless, this assessment must be seen against the backdrop of a difficult period for European economies as a result of the pandemic. It should also be noted that the effects of the EU Mobility Package, whose provisions came fully into force in 2022, may yet have a further impact on the situation.

### 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.