



Road Freight Transport Vademecum

2010 Report

**Market trends and structure
of the road haulage sector
in the EU in 2010**

**European Commission
DG for Mobility and Transport
Unit D.3 – Land transport
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Key findings

- The road freight transport sector in the EU has not yet fully recovered from the drop in activity in the wake of the economic crisis in 2008/09. In terms of tonne-km, the activity level in 2010 was still 9% below pre-crisis levels of 2007.
- There are considerable differences in the activity levels of individual Member States. Hauliers from many of the Member States that joined the EU in 2004 and 2007 could considerably increase their market share during the crisis.
- Road freight transport accounts for 73% of all inland freight transport activities in the EU. After having slightly risen in 2009, the modal share of road is now back to where it was before the crisis. The other inland modes rail and inland waterways recovered somewhat more strongly than road, albeit from a deeper hole.
- The lifting of special cabotage restrictions on 1 May 2009 which applied for a transition period of up to five years to hauliers from most of the countries that joined the EU in 2004 shows remarkable effects: cabotage activities of hauliers from these countries almost tripled between 2008 and 2010.

Introduction

Road freight transport is an essential economic activity. Without it, our economies would not function. The road freight sector in the EU has developed very dynamically. It is useful for policy makers, stakeholders and other interested parties to have up-to-date information on the structure of the industry and on major trends. Road *passenger* transport is another important segment of road transport which is, however, not subject of this vademecum.

This report has been drafted by the Land Transport Unit of DG MOVE with the aim to provide a concise overview of latest developments in road freight transport activities in the EU. For the most part, it is based on data from Eurostat collected under Council Regulation (EC) No 1172/98 on statistical returns in respect of the carriage of goods by road.¹

The report is based on data up to the end of 2010. As Greece and the United Kingdom had not yet reported 2010 data to Eurostat by the time this report has been drafted, 2009 data from these countries have been used instead. As Malta did not report any road freight data, it could not be covered in the analysis.

Eurostat road freight data are a compilation of data collected by the Member States. Each Member State reports the activities of its national fleet. The data are collected in samples which are taken on the basis of the national vehicle register. When reading this report, it should be borne in mind that whenever the report mentions hauliers of a specific Member State, what it means in effect is vehicles registered in that Member State.

As it has become common in recent years for hauliers from some Member States to "outflag" and use vehicles registered in another Member State, including drivers and personnel employed under the conditions of that other Member State, the activities of the national fleet and the activities of national hauliers are not necessarily the same any longer. For ease of reading, the term "haulier" has nevertheless been kept.

¹ OJ L163 of 6.6.1998, p. 1

1 Current overall trend

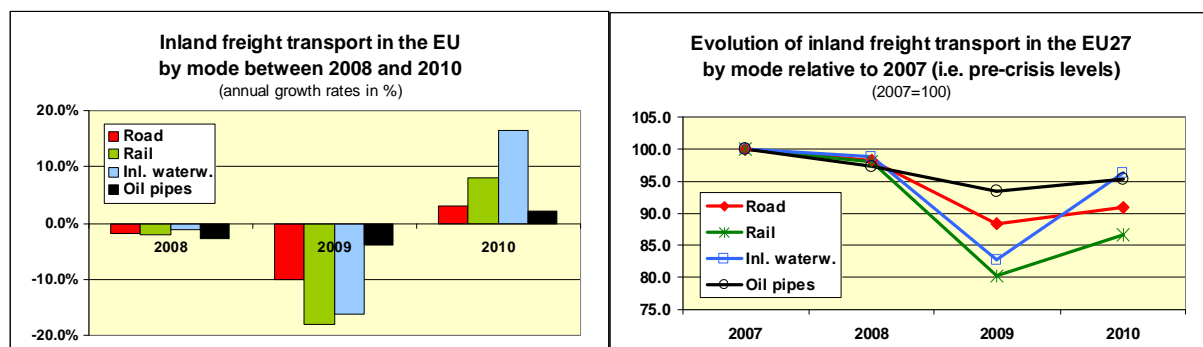
The road freight market in the EU is currently recovering from the deep economic crisis of 2008/09 which greatly reduced transport activity. **In 2010, road freight transport activity** in the EU, measured in tonne-km, was roughly **3% higher than in 2009**. However, this followed a fall of 2% in 2008 and another 10% drop in 2009 which leaves road freight transport activity in the EU **still about 9% below pre-crisis levels of 2007**. This development has not been uniform throughout the EU though. While EU15 hauliers were on average still 13% below 2007 levels in 2010, their colleagues from the EU12 were on average already 8% above pre-crisis levels.

1.1 Evolution of road transport in the context of total inland transport activity

Inland transport covers all transport activities that go over land, i.e. all modes but air and maritime transport. It hence includes transport by road, by rail, on inland waterways and through pipelines. Transport by rail and on inland waterways suffered more heavily during the economic crisis but is now recovering somewhat faster. The transport of bulky goods – which usually go by rail or inland waterway – appears to be more cyclical than the transport of other goods.

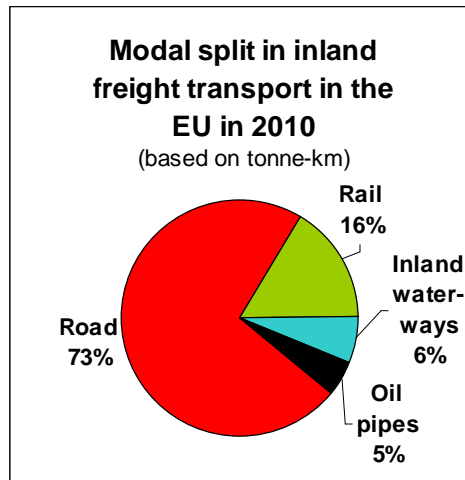
Measured in tonne-km, rail freight transport activity in the EU lost 2% in 2008 and 18% in 2009 before growing by 8% in 2010. Transport activity on inland waterways in the EU decreased by 1% in 2008 and by another 16% in 2009 but bounced back in 2010 with a (partly estimated) 16% growth compared to 2009. Oil pipelines lost 3 and 4% in 2008 and 2009 respectively compared with the year before. Currently available data suggest that around 2% more tonne-km were generated by oil pipelines in 2010 than in 2009.

This suggests that no inland mode of freight transport has reached the pre-crisis activity level yet. Relative to the situation in 2007, rail freight transport was still 13% lower in 2010, while transport on inland waterways almost reached pre-crisis levels but was still 4% short.² The tonne-km generated by oil pipelines were still around 5% lower than in 2007.



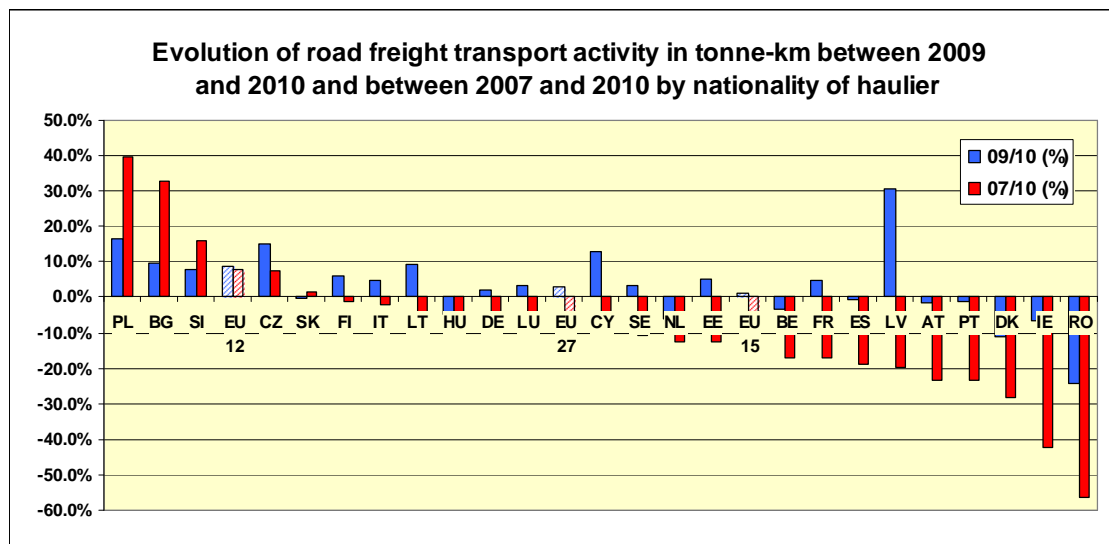
While freight transport activities by road did not collapse by as much as the corresponding activities on rail and inland waterways, road freight transport appears to recover somewhat more slowly than the other modes. As a consequence, it lost some modal share in inland transport in the EU compared to the situation in 2009. With a share of 73% of all inland transport activities, it is back to its level in 2007 and 2008 and in any case still the by far most dominant mode of intra-EU inland freight transport.

² In the case of inland waterways, overall figures provided by Eurostat may suggest that pre-crisis levels have been reached again. As Bulgaria and Romania started to report pretty important *transit* traffic in 2008/2009, however, the total amount provided by Eurostat for the years 2007 and 2010 cannot be compared as such. In order to be able to compare the data of the two years, inland waterway *transit* traffic reported by these two countries has not been taken into account in this analysis.



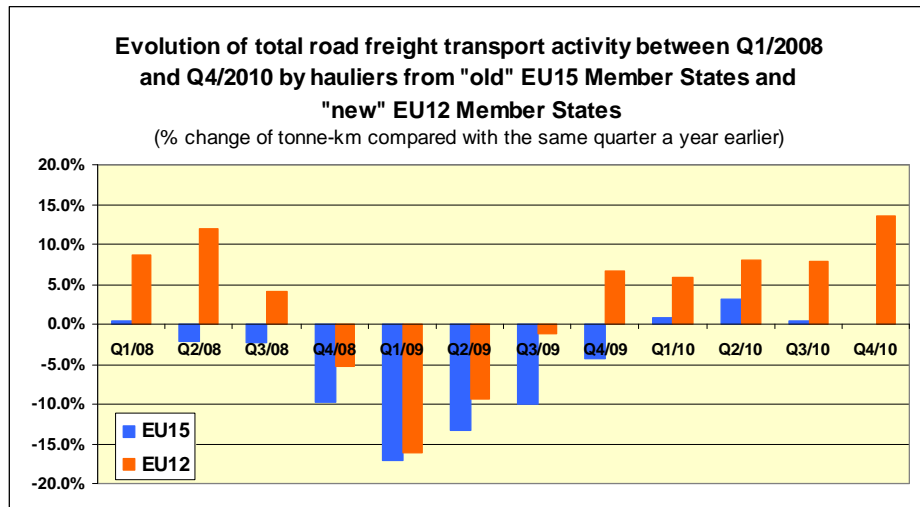
1.2 Different situation according to Member State

Over the last years, the evolution of road freight transport activity in the EU was uneven across the Member States. Hauliers from most of the 12 Member States that joined the EU in 2004 and 2007 appear to have recovered much better from the depth of the crisis than hauliers from the 15 "old" Member States. Romanian hauliers are a notable exception given that – according to the statistics provided – their activity level is still more than 50% below where it was in 2007. While EU15 hauliers as a whole reported 13% fewer tonne-km in 2010 than in 2007, the amount of tonne-km reported by EU12 hauliers was 8% higher than in 2007, suggesting that they have more than recovered from the slump in activity in the wake of the economic crisis.



Note: Data for GR, MT and UK are not available.

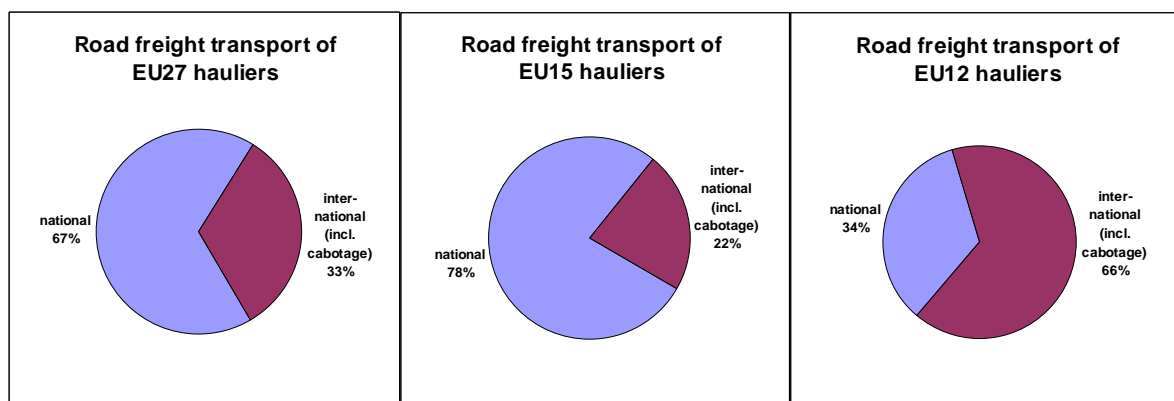
Hauliers from the EU12 are gaining market shares, above all in international transport where they already account for almost half of all activity in the EU (48% in 2010), up from a third (32%) only 5 years earlier. Hauliers from the EU15 by contrast appear to be struggling. None of them has returned to the pre-crisis level yet. Moreover, the growth of their activity almost ground to a halt in the second half of 2010.



2 Market integration

2.1 National freight transport in the EU

National (i.e. not border-crossing) transport activities by domestic hauliers³ account for about two thirds of all road freight transport activities in the EU. With a share of around three quarter (in fact, close to 78%) of all transport activities, the relative importance of national road freight transport is much bigger for hauliers from the "old" Member States than for hauliers from the "new" ones where national transport activities account for merely a third of all activities (34%) when measured in tonne-km. In larger Member States, however, the share of national transport activities is bound to be higher than in smaller ones. Many of the largest Member States are long-standing members of the EU.



National transport activities usually grow more slowly than international transport activities. In 2010, the tonne-km generated in national transport increased by 1.2% while those generated in international transport grew by 6.5%. This allowed international transport to recover somewhat from a deeper fall in 2009 when its activities dropped by 12% as opposed to the 9% decline in national transport. Overall, the recent economic crisis hit both categories almost equally hard with national transport activities still almost 10% lower in 2010 than before the crisis in 2007 and international transport still roughly 8% down.

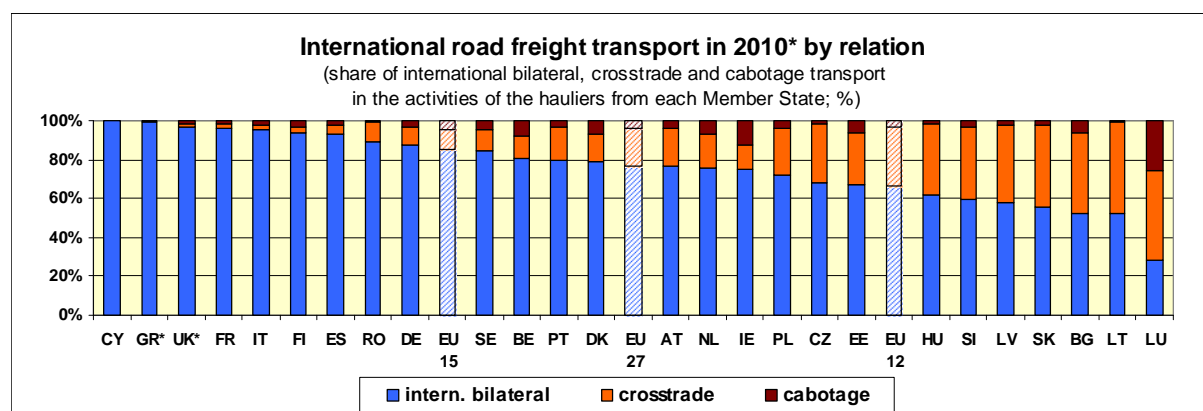
³ Transport within a country by *foreign* hauliers is cabotage; see section 2.2.3 below.

2.2 International freight transport (including cabotage)

International road freight transport can be broken down into three distinct categories:

- **bilateral international transport** where either the loading or unloading activity takes place in the country where the vehicle is registered;
- **crosstrade** where loading and unloading take place in two different countries none of which is the country where the vehicle is registered; and
- **cabotage** where loading and unloading take place in the same country which is however not the country where the vehicle is registered.⁴

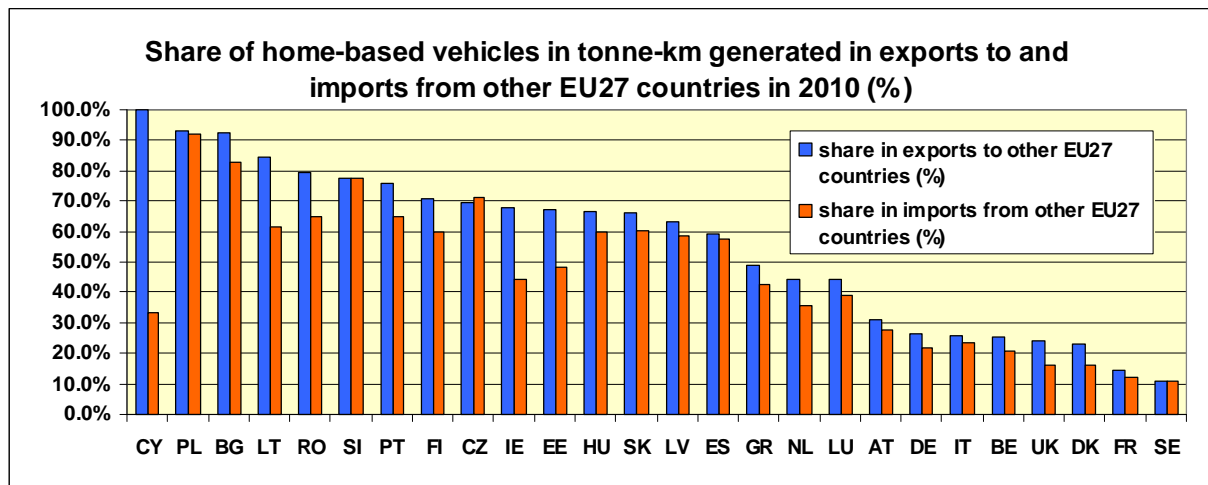
Bilateral international transport accounts for the lions' share (76%) in international transport in the EU. Crosstrade accounts for about a fifth (20%) and cabotage for the remaining 4% of all international transport activities. The respective shares are very different from country to country. As a rule, crosstrade and cabotage play a relatively more important role in the transport activities of hauliers from smaller countries.



2.2.1 Bilateral international transport

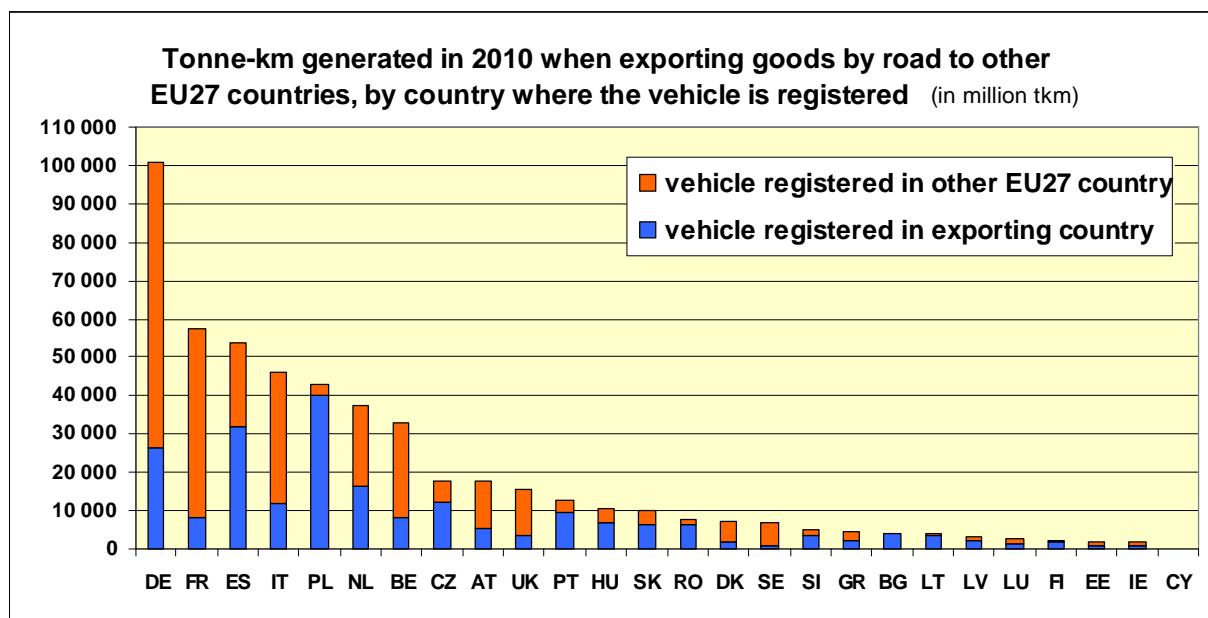
When the exports and imports of a given country are transported by hauliers from the exporting country or by hauliers from the importing country, this qualifies as bilateral international transport. Disregarding the possibility of crosstrade, where a haulier from a third country carries out the transport operation, one may under certain conditions expect an equal distribution of the transport activities between hauliers from the importing and hauliers from the exporting country. In reality, however, this is rarely the case in the EU. In fact, hauliers from some countries, in particular from the new Member States, hugely dominate bilateral export and import activities while hauliers from some other countries, usually from the old Member States, have only a small share of the overall import and export activities of their respective countries. As a rule, the market share of vehicles registered in the exporting country is higher than the share of these vehicles in the imports of that country.

⁴ Strictly speaking, cabotage is not international transport because no borders are crossed when the activity is being carried out. However, this report follows the concept used in EU legislation and the definition used by Eurostat. Both view cabotage from the perspective of the haulier for whom the activity takes place outside the country where it is based.

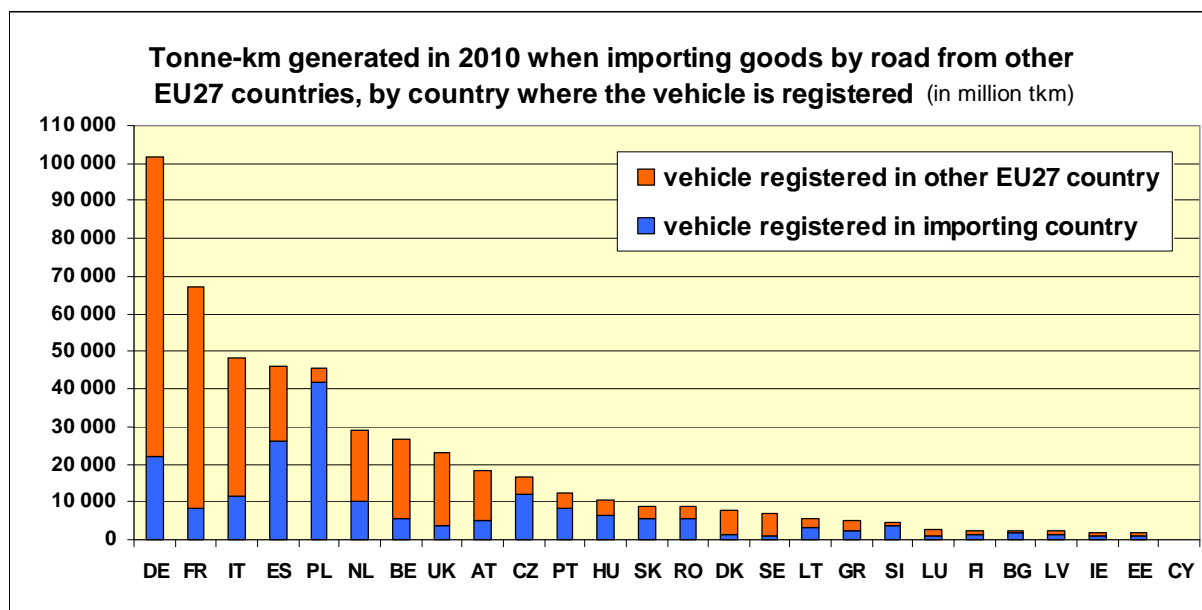


The reliability of data on market shares in exports and imports of small countries is limited as the samples collected from most EU countries are not sufficiently big to produce high-quality data on the activities of their vehicles in small countries. For medium-sized and larger Member States, the shares are however meaningful. With this in mind, it is still clear that some of the new Member States, e.g. Poland, Bulgaria, Lithuania, Romania and Slovenia are largely dominating the transport operations in the external trade of their respective countries. At the other end of the spectrum, hauliers from countries such as Sweden or France, but also Germany, Italy, Belgium, Denmark and the UK, appear to have serious difficulties in capturing market share when it comes to carrying the exports and imports of their own economies. It should be kept in mind, however, that the available data are based on the country where the vehicle is registered. They do not necessarily correspond to the activities of haulage companies based in a given country.⁵

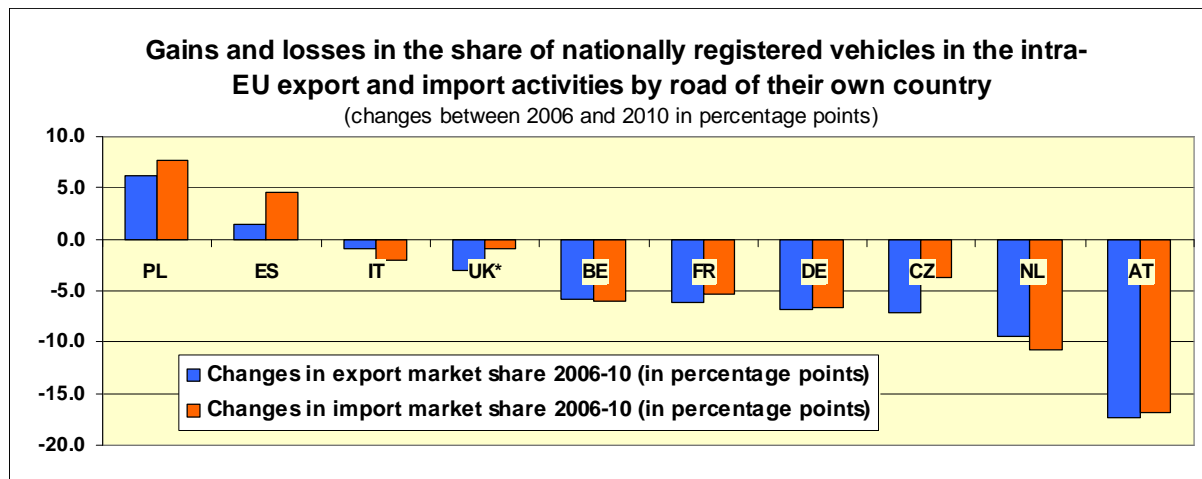
The following two graphs look at the same phenomenon from a different angle. They give an impression of the absolute size of the international transport markets (in terms of tonne-km generated) by country in which the goods are loaded (i.e. from which they are exported) or unloaded (i.e. to which they are imported). The top ten on both the export and the import side is made up of the same countries. Together, they account for 83% of the total market, leaving the remaining 17% for the export and import activities of the other 17 countries.



⁵ See also last paragraph of introduction above (p.3)



A closer look at the ten biggest countries shows some uneven developments over time. When comparing the shares of home-based hauliers in the intra-EU export and import activities of their countries by road in 2006 and 2010, only Polish and Spanish hauliers managed to increase their share of the pie. Polish and Spanish exports and imports are more than ever being transported by vehicles registered in these countries. Hauliers from the other eight countries – among which also Czechia – have lost some ground in the carriage of the exports and imports of their own economies. Losing around 17 percentage points in market share, Austrian hauliers appear to be hardest hit.



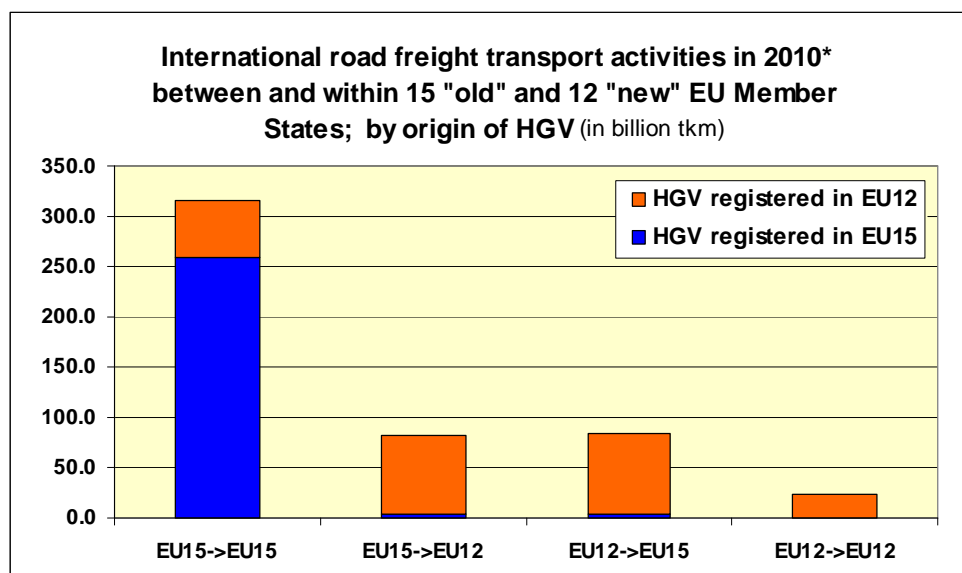
Note: * The growth rate for the UK is based on 2009 data reported by UK and 2010 data reported by other EU countries.

Overall, the international transport market in the EU is characterised by an increasing degree of specialisation and an international division of labour according to relative advantages. Hauliers above all from the new Member States appear to have a considerable relative competitive advantage on their side. This is also apparent when analysing who is actually carrying out international transport activities between and among the 15 old and the 12 new Member States.

International transport activities among EU15 countries are still largely dominated by EU15 hauliers, who account for 82% of the total tonne-km thus generated. The remaining 18% are an essential part of the crosstrade activities of EU12 hauliers. International transport from

one EU15 country to another EU15 country accounts for 62.5% of all tonne-km generated in international intra-EU transport by EU hauliers.

Transport activities from the old to the new Member States or in the opposite direction are however almost exclusively carried out by EU12 hauliers. They account for 95% of all tonne-km generated during transport operations from the old to the new Member States (EU15 • EU12) and for 96% of the corresponding total when carrying goods from the new to the old Member States (EU12 • EU15). Transporting goods from one EU12 country to another EU12 country is being done to the tune of 99.7% by EU12 hauliers, leaving 0.3% of this market for EU15 hauliers.

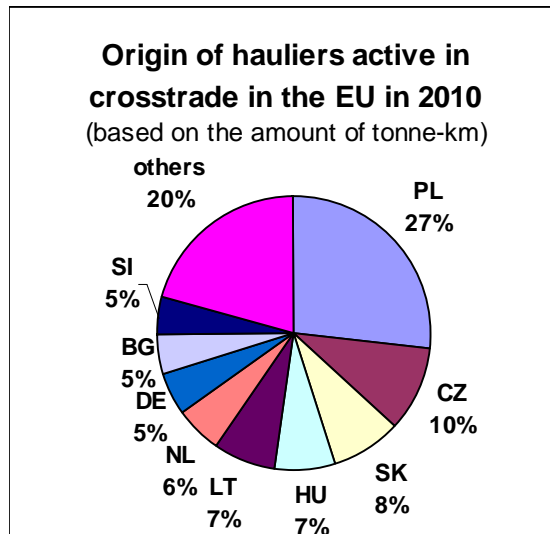


2.2.2 Crosstrade

Crosstrade is a fast growing segment of the international road freight transport market. It is a clear sign of an ever more integrated road freight transport market in the EU. In 2010, the tonne-km generated in crosstrade were 6% higher than in 2009. They were roughly 50% up from the level in 2005. The integration is however slightly lopsided as EU15 hauliers appear to withdraw from this segment (their tonne-km being around a quarter (23%) down from 2005) while EU12 hauliers are more than ready to fill the gap – they more than doubled their cross-trading activities since 2005 (+130%).

With around 115 billion tonne-km in 2010, crosstrade accounted for about 20% of all tonne-km generated in international transport by hauliers from the EU. For EU12 hauliers, crosstrade already makes up 30% of their international activities while the corresponding share for EU15 hauliers is 10%.

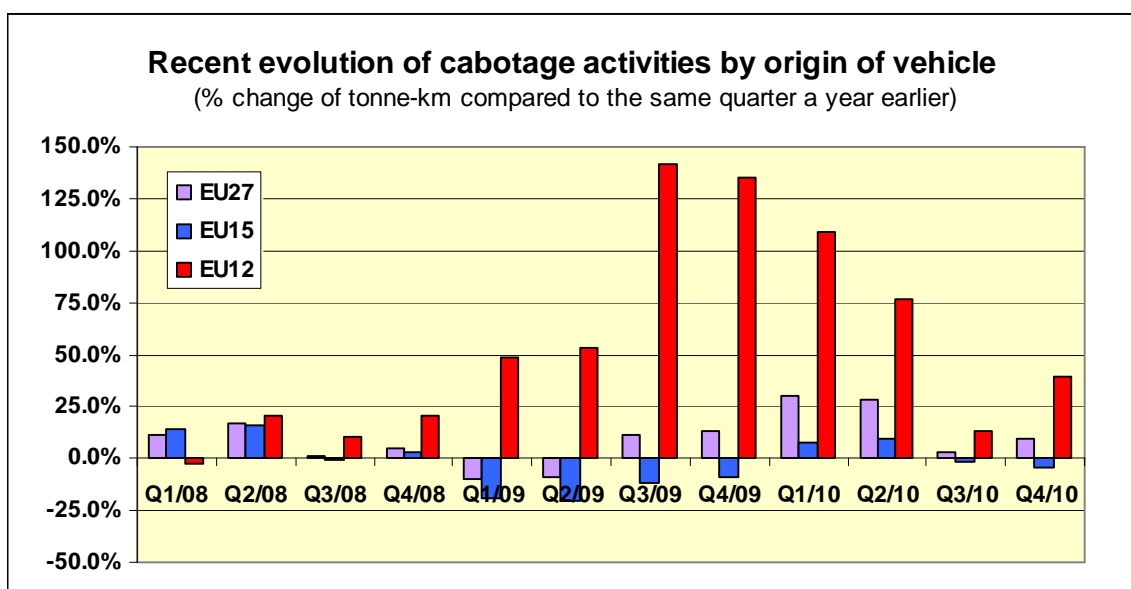
Almost three quarter (74%) of all crosstrade in the EU is being carried out by hauliers from the EU12. In 2005, they still accounted for only about half of all tonne-km generated in crosstrade. The share of EU15 hauliers correspondingly halved between 2005 and 2010. With a share of more than a quarter (27%), Polish hauliers are by far the biggest "cross traders" in the EU. They are followed by hauliers from Czechia (10%), from Slovakia (8%), from Hungary and from Lithuania (7% each).



2.2.3 Cabotage

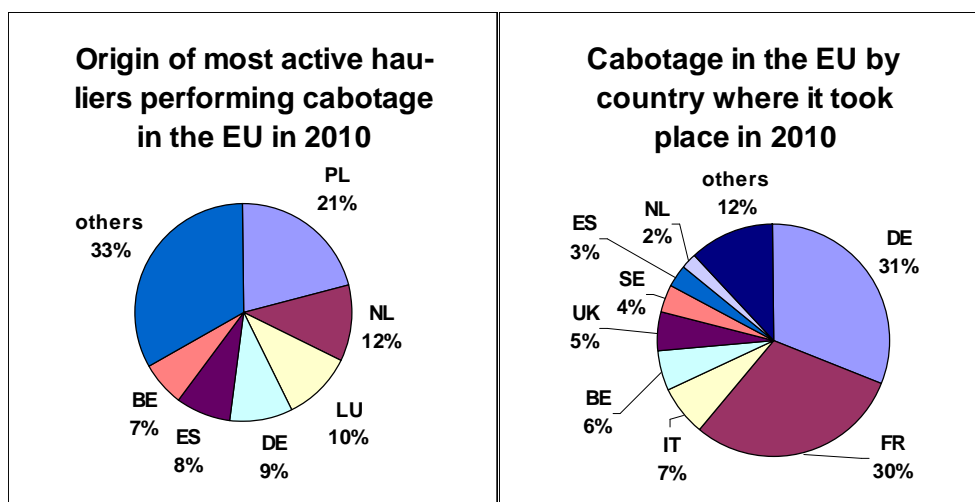
Cabotage is in fact national transport carried out by a non-resident haulier. It is not yet fully liberalised in the EU. According to Article 8 of Regulation (EC) No 1072/2009⁶, only up to three cabotage operations in a country are allowed during at most seven days following an international delivery to that country. Cabotage still accounts for a fraction (1.2%) of total road freight transport activities in the EU. Cabotage activities are however growing rapidly. In 2010, the tonne-km generated by EU hauliers in cabotage operations were 17% higher than in 2009.

The growth was particularly strong for EU12 hauliers (+51%). As it followed an almost doubling of their activities in 2009 (+94%), cabotage by EU12 hauliers rose almost threefold (+194%) between 2008 and 2010. The lifting on 1 May 2009 of all special restrictions regarding cabotage which had been imposed on hauliers from most of the countries that joined the EU in 2004 and which lasted for five years is likely to have played a major role in this extraordinary development. The economic crisis may have contributed to the success of EU12 hauliers in gaining market share as they are apparently able to offer freight transport services at competitive conditions.



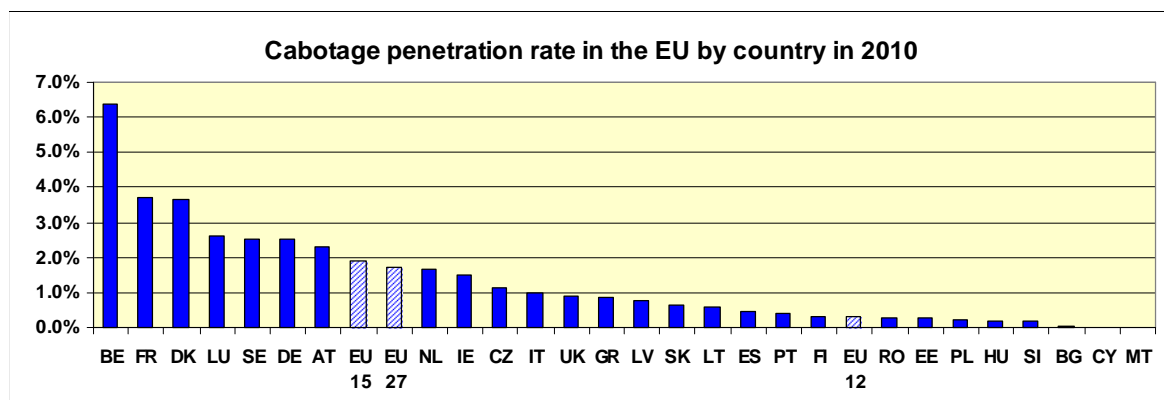
⁶ OJ L300 of 14.11.2009, p. 72.

Hauliers from the EU12 countries account for more than a third (38%) of all tonne-km generated in cabotage operations by all EU hauliers. In 2008, their share had still been no higher than 15%. Polish hauliers are the most active ones, generating about one fifth (21%) of all cabotage tonne-km in the EU in 2010. In 2009, they managed to leave hauliers from Germany and the Benelux countries behind which have traditionally been very active in the cabotage business and which, alongside Spanish hauliers, continue to be important actors in road freight cabotage in the EU.



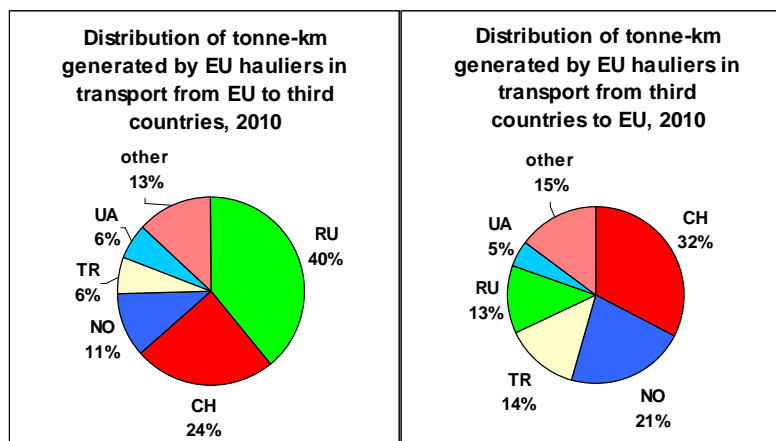
Mainly due to the size of their markets, the larger countries in the EU are the ones where most cabotage operations take place. In absolute terms, Germany was the leading host country for cabotage operations in 2010 (6.5 bln tkm). It has once again overtaken France (6.2 bln tkm) which was holding that position since 2002. The only smaller countries featuring prominently in the list of important cabotage hosts are Belgium and the Netherlands which can be explained by their important ports (Antwerp, Rotterdam, Amsterdam) and corresponding hinterland traffic. Sweden is another popular place for cabotage operations, mainly by hauliers from other countries bordering the Baltic Sea. Almost all (97.7% in 2010) cabotage in the EU takes place in the old Member States.

In relative terms, compared with the total size of the national road freight transport market, Belgium is giving away the biggest share of the pie: its cabotage penetration rate was 6.4% in 2010. The cabotage penetration rate is defined as the share of cabotage in total national transport where total national transport includes national transport by domestic hauliers and by foreign hauliers (i.e. cabotage in the latter case). Other important host countries in relative terms are France and Denmark with a penetration rate of 3.7% each. In the EU27 as a whole, the cabotage penetration rate was 1.7% in 2010. Only three years earlier, in 2007, the average penetration rate in the EU was still at a very modest 1.2%. It looks as if both the economic crisis in 2008/09 and the opening of the cabotage market for hauliers from the countries that joined the EU in 2004 have boosted cabotage activities in the EU.



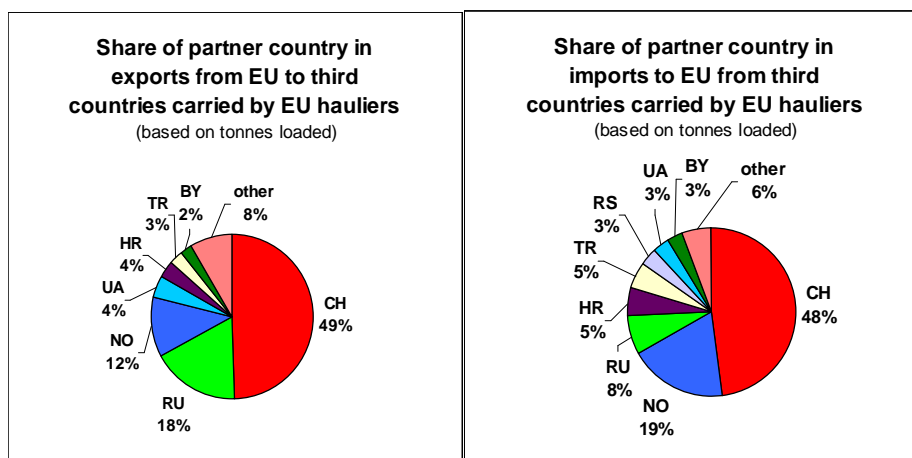
2.2.4 Relations with third countries

International intra-EU transport accounts for around 92% of all international transport activities by EU hauliers, when measured in tonne-km. Exports from the EU to third countries contribute 6% and the remaining 2% come from imports from third countries to the EU. The share of extra-EU transport activities is considerably higher in some of the countries with an extra-EU border (e.g. Finland, Sweden, Bulgaria and the Baltic countries). Exports to Russia contribute around 40% to all tonne-km generated by EU hauliers when goods are transported from the EU to third countries. This is more than twice as much as Russia's share in the tonnage transported (see below) which can be explained by the great distances that have to be covered in this country. Imports from Switzerland make up nearly a third of all tonne-km generated by EU hauliers when they carry goods from third countries to the EU.



In terms of tonnes loaded, 93% of all goods carried by EU hauliers in international transport are loaded and unloaded in the EU, 5% are loaded in the EU and unloaded in third countries while the remaining 2% are loaded in third countries and unloaded in the EU. Back in 2000, road freight transport activities with the then extra-EU15 countries also accounted for 7% of total tonnage carried by EU15 hauliers, so EU enlargement has not reduced the relative importance of extra-EU road freight transport.

Among the partner countries, Switzerland (CH) accounts for roughly half the total tonnage on both the import and export side. Russia (RU) and Norway (NO) follow, together accounting for roughly a quarter of the total. Russia is in second place on the export side while Norway is more important on the import side. The remaining quarter is shared by the candidate countries Turkey (TR) and Croatia (HR) and other countries, mostly on the Western Balkans (e.g. Serbia (RS)) and in Eastern Europe (e.g. Ukraine (UA) and Belarus (BY)).

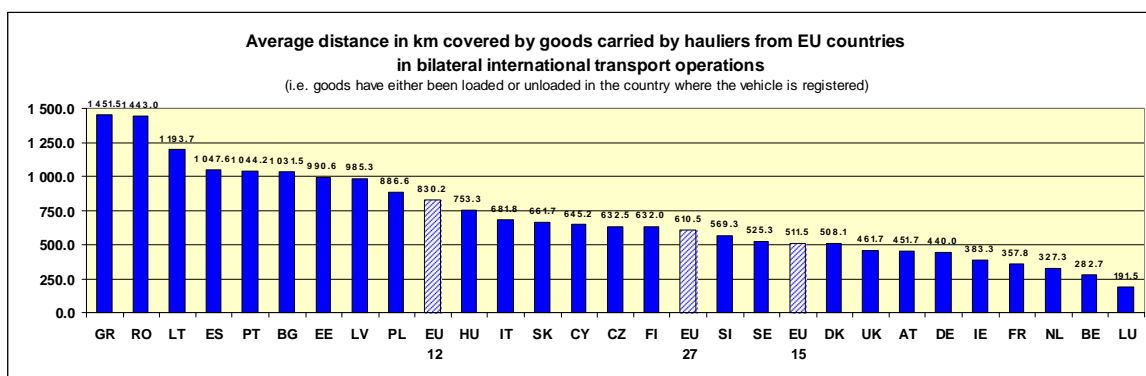


With the exception of the EFTA countries, no precise data are available on the share of EU hauliers in the import and export activities with third countries by road.

3 Transport efficiency

3.1 Distance of road freight journeys

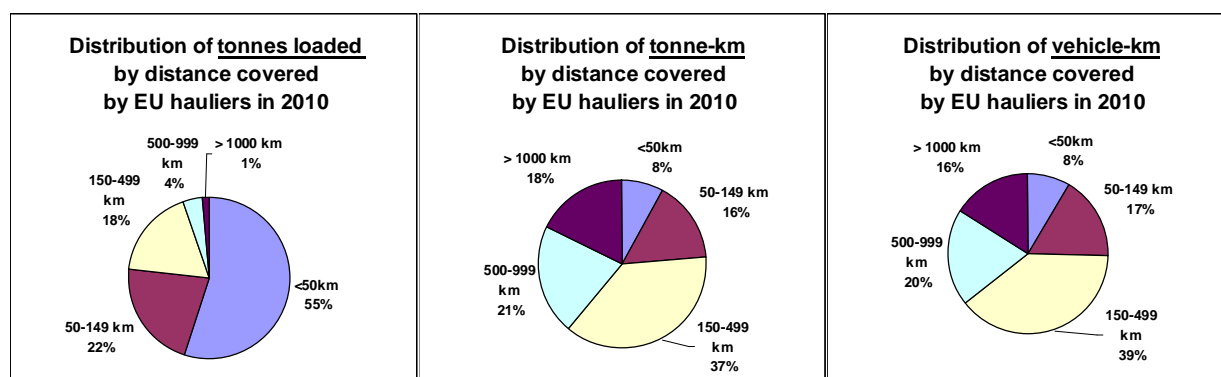
When dividing the amount of tonne-km generated by the hauliers from a specific country by the amount of tonnes carried, one gets the average distance each tonne has been transported. While in national transport such an exercise is trivial as the hauliers from larger countries would as a rule cover longer distances than their colleagues from the smaller ones, in international transport, and more specifically in bilateral international transport, such an exercise can provide an indication about the distance to the main markets of a given country.



Goods which are transported from or to countries in the periphery of the EU cover the longest distances. Hauliers from Greece, Romania and Bulgaria, from Spain and Portugal and from the three Baltic countries carry goods over the longest distances when importing or exporting them to or from their home countries. On the other side, hauliers from Europe's economic heartland including Germany, France, Austria and the Benelux countries have the shortest distances. For Irish and UK hauliers, the distances are somewhat reduced due to the need to use other means of transport (Channel tunnel rail or ferry) for part of the journey.

The distribution of road freight transport activity by distance class reveals that more than half (55%) of all goods in terms of their weight are not transported more than 50km. Three quarter of all goods are not transported more than 150 km. It is in these distance brackets where road transport has no economically viable competing mode of transport. Only around a quarter of all goods are transported over distances greater than 150km.

When looking at the distribution in tonne-km, where the tonnes loaded are multiplied by the distance covered, then the longer distances make themselves felt: around three quarter (76%) of all tonne-km are generated on distances greater than 150km. While more than half of all goods are transported on distances up to 50km, the share of this distance bracket in the total amount of tonne-km generated is just 8%. The situation in terms of vehicle-km is very similar to the one in tonne-km. The slightly higher loading factor on long-distance journeys than on short-distance ones explains the somewhat higher importance of the longer distances in the distance breakdown of the tonne-km data than in the vehicle-km data breakdown. The distance distribution has stayed more or less the same over the last years.



3.2 Empty runs

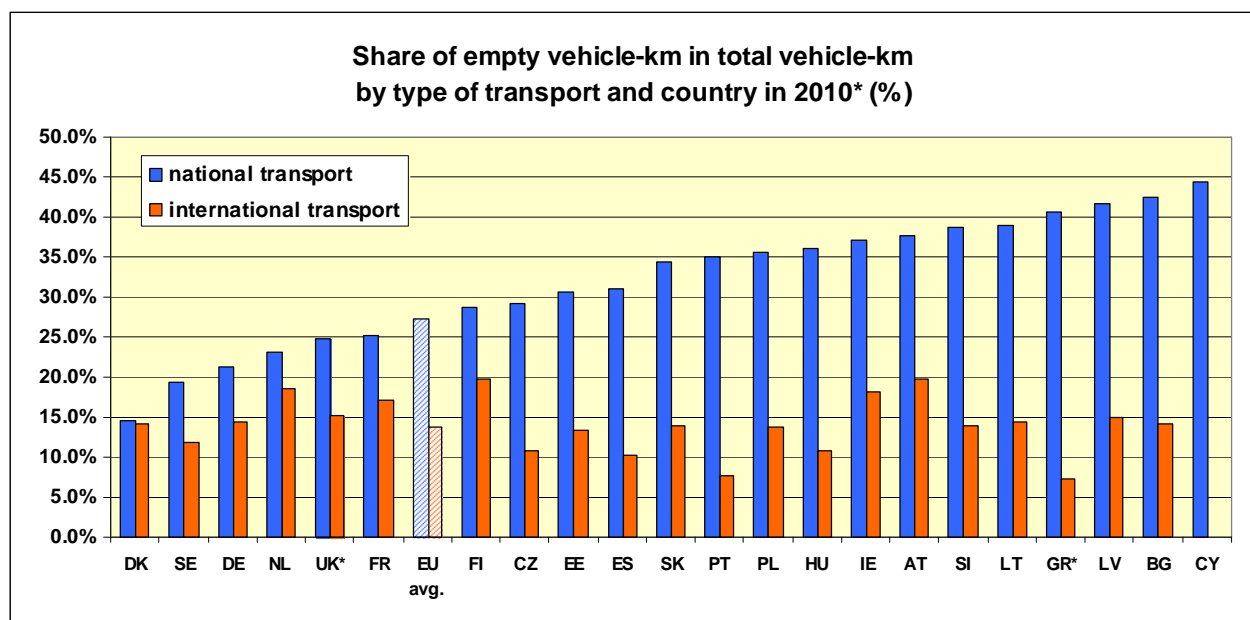
Increasing the efficiency of the transport system is one of the most important goals of European transport policy. Empty runs of road freight vehicles are inefficient and should therefore be avoided as much as possible. In 2010, almost a quarter (23.9%) of all vehicle-km of heavy road goods vehicles in the EU involved an empty vehicle. This was about 1 percentage point lower than in the years 2006 to 2009, when the share of empty vehicle-km in the EU was close to 25%, without major changes. The recovery in 2010 helped improve the efficiency of the road haulage sector in the EU to some extent.

In national transport, the share of empty vehicle-km is usually higher than in international transport. In 2010, it was slightly more than a quarter (27.3%) in national transport while it was only about half as high (13.6%) in international transport. Possible explanations for this notable difference between national and international transport are technical restrictions on taking return loads (e.g. milk trucks, trucks transporting excavation material from construction sites) – these loads are more prevalent in national than in international transport – and a need to be more efficient in international transport as it usually involves longer distances where empty return trips are more costly.

As one would expect, given the competitive situation, the share of empty runs is higher in own account transport than in transport for hire or reward. In 2010, it was 30.6% in own account transport but just 21.4% in transport for hire and reward.

share of empty vehicle-km in the EU in 2010			
	own account	hire or reward	total
national	30.9%	25.5%	27.3%
international	26.8%	12.8%	13.6%
total	30.6%	21.4%	23.9%

There are significant differences in the share of empty vehicle-km from country to country. Hauliers from Denmark, Sweden, Germany and the Netherlands appear to be more efficient than hauliers from other countries. The EU average refers to 22 countries only as no data are available from Belgium, Italy, Luxembourg, Malta and Romania.

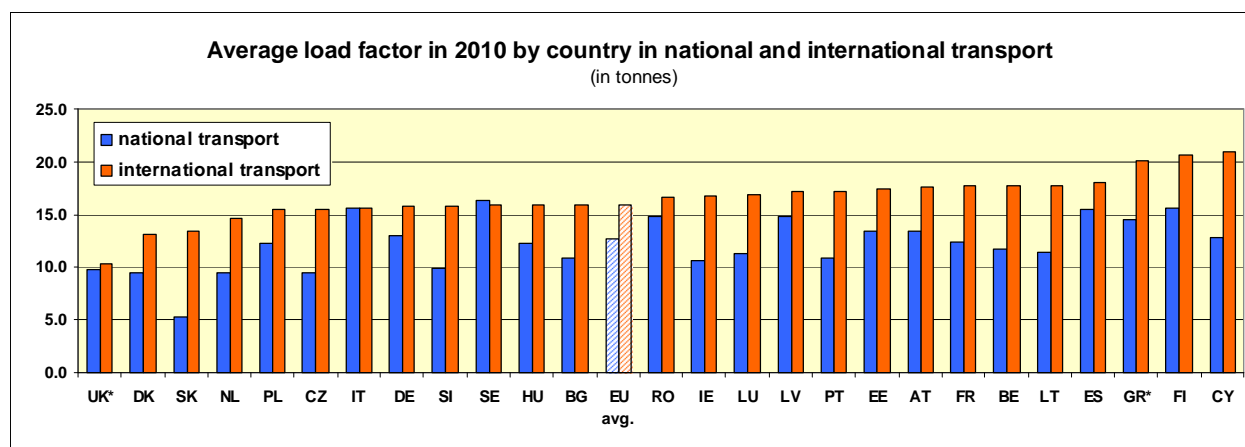


3.3 Average load factor

The load factor is another measure of the efficiency of road transport. The higher the load factor, the fewer vehicle-km are needed to generate a given amount of tonne-km. Fewer vehicle-km mean less traffic and hence less congestion. In the EU, the average load factor of loaded heavy goods vehicles was 13.6 tonnes in 2010. Similar to the situation with empty runs, international transport operations appear to be more efficient than national ones and transport for hire or reward is more efficient than own account transport. The average load factor has stayed more or less constant between 13 and 14 tonnes over the last couple of years.⁷

average load factor in the EU in 2010			
	own account	hire or reward	total
national	8.5 t	14.5 t	12.7 t
international	12.8 t	16.1 t	16.0 t
total	8.8 t	15.0 t	13.6 t

The average load factor appears to be higher the longer the distances are. Hauliers from peripheral countries such as Spain, Cyprus, Finland and Greece appear to have the highest load factors in international transport operations.



4 Actors in road freight transport

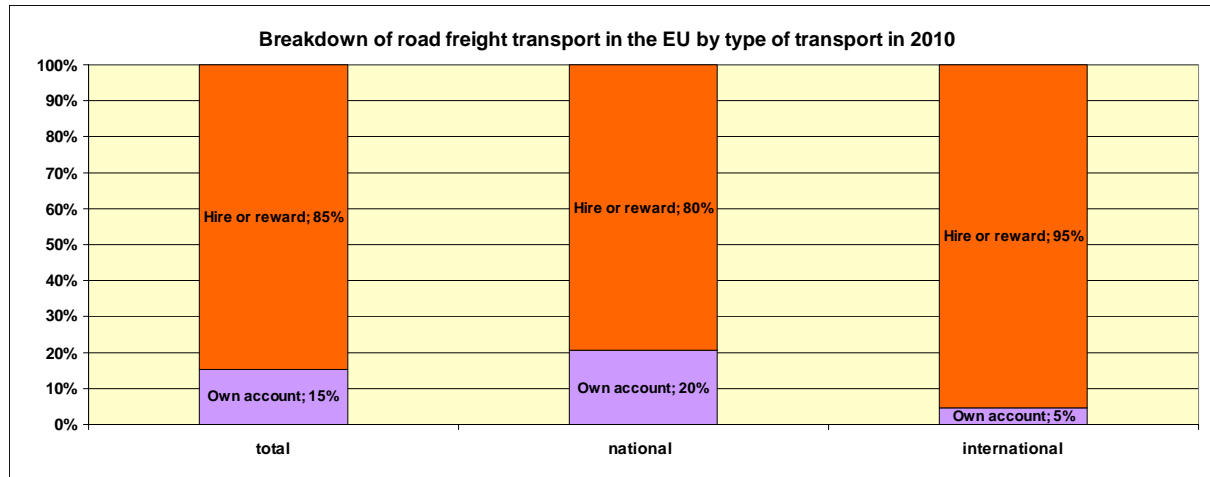
4.1 Own account versus hire or reward

Roughly one in six tonne-km generated in road freight transport by EU hauliers comes from own account transport. In 2010, the share of own account was 15.2% after 16.9% in 2009 and 15.8% in 2008. The 2010 data for own account are still preliminary as Germany reported a 20% fall in its own account activities which still needs to be verified⁸. Own account transport is relatively strong in national transport where it has a share of slightly more than 20% (20.4% in 2010 after 22.3% in 2009 and 20.7% in 2008) in total activity. In international transport, however, only around 5% (4.6% in 2010 after 5.4% in 2009 and 5.6% in 2008) of all activities are carried out on own account.

⁷ The load factor calculated here takes only loaded journeys into account. In empty journeys, the load factor is by definition zero.

⁸ See also the following article (in German) of 5 August 2011 in VerkehrsRundschau:
<http://www.verkehrsrundschau.de/verband-zweifelt-zahlen-des-bundesamtes-fuer-gueterverkehr-an-1053143.html>

The economic crisis in 2008/09 appears to have hit road transport activities for hire and reward somewhat harder than own account activities. Own account transport activities have decreased by merely 2.3% between 2007 and 2009, while activities for hire or reward have dropped by 13.4%. Fewer transport activities appear to have been contracted out during the economic crisis. More companies were carrying out the transportation of their goods by themselves.



4.2 Freight forwarders

The largest European land transport provider is DB Schenker, although this definition is based on both rail freight and road freight revenues. In 2009 it had revenues of €11.3bn, followed by SNCF and DHL Freight. The Danish-based logistics company DSV has grown to become a significant player in Europe through the acquisition of ABX Logistics. Other companies include largely German-based Dachser and Swiss-based Kuehne+Nagel, which have been aggressively building operations in this sector over the past few years.

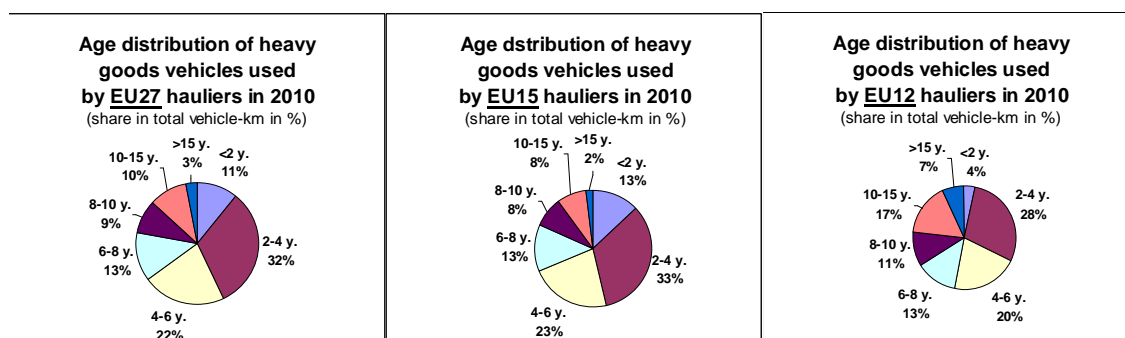
Rank	Company	Turnover M€2009	Country
1	DB Schenker	11292	DE
2	SNCF	7400	FR
3	DHL Freight	3065	GB
4	DSV A/S-	2468	DK
5	Dachser	2171	DE
6	Kuehne+Nagel	1896	CH
7	GEFCO SA	1588	FR
8	Norbert Dentressangle	1486	FR
9	LKW Walter Group	1230	AT
10	Rhenus AG	899	DE

Source: Transport Intelligence & Booz & Company.

5 Vehicles used in road freight transport

5.1 Age structure

The age distribution of the vehicles in use for road freight transport in the EU reveals that the overall majority of activity is being carried out by relatively modern vehicles. Vehicles up to 4 years of age account for 43% of total vehicle-km while 13% of all vehicle-km come from vehicles older than 10 years. The vehicles in use by EU15 hauliers are somewhat younger than those in use by EU12 hauliers. On average, almost half (46%) of all vehicle-km driven by EU15 hauliers are from vehicles up to 4 years old. The corresponding share for EU12 hauliers is closer to a third (32%). At the other end of the age spectrum, vehicles older than 10 years account for almost a quarter (24%) of all vehicle-km by EU12 hauliers while they only contribute 10% to the vehicle-km of EU15 hauliers. Greek hauliers are a notable exception here. Their vehicles older than 10 years account for more than 40% of all Greek heavy goods vehicle-km.

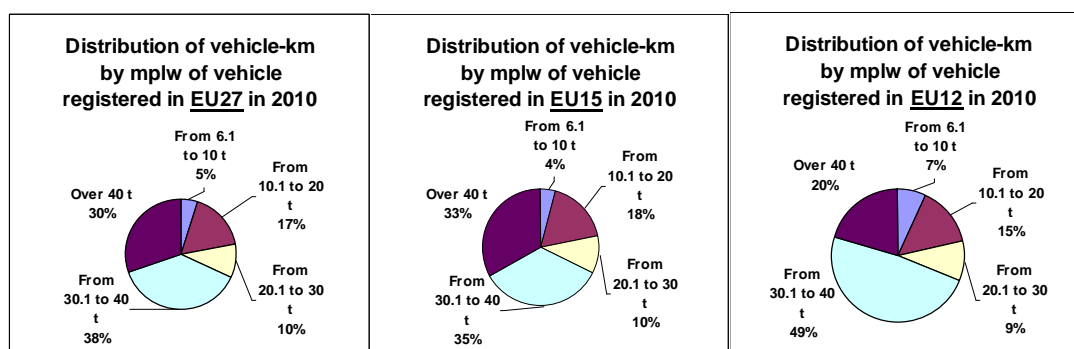


As younger, more modern vehicles are usually used more intensively than older vehicles, the fleet distribution by number of vehicles shows a lower share for younger vehicles than given here. Correspondingly, the share of older vehicles in the total fleet is higher.

Tolling arrangements in the EU which charge less for cleaner vehicles (in terms of EURO standards) provide an incentive for fleet renewal. The economic crisis in 2008/09 however had a major braking impact on fleet renewal. This can be seen when comparing the share of vehicles up to 2 years of age in total vehicle-km with the share of the other 2-year brackets.

5.2 Load capacity

Heavy goods vehicles come in different sizes starting from a load capacity of 3.5 tonnes which more or less corresponds to a maximum permissible laden weight of 6 tonnes. Smaller heavy goods vehicles, those with a maximum weight of up to 20 tonnes, account for almost a quarter (22%) of all heavy goods vehicle-km. Roughly half of all heavy goods vehicle-km come from vehicles with a maximum weight of between 20 and 40 tonnes. Vehicles with a maximum weight over 40t account for 30% of all heavy goods vehicle-km. The heaviest vehicles appear to be slightly more used by EU15 hauliers than by EU12 hauliers: they account for 33% of all vehicle-km of EU15 hauliers, but only 20% in the case of EU12 hauliers.



mplw = maximum permissible laden weight