



European
Commission

Europe on the Move



An Overview of the EU Road Transport Market in 2015

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Key findings

- Road freight transport in the EU still has not fully recovered from the impact of the economic and financial crisis in 2008/09 but there has been some steady growth in activity since 2012
- There is no measurable modal shift: At 72%, the modal share of road in the activities of all inland transport modes was the same in 2015 as 10 years earlier. Road haulage over long distances (>300 km) is however growing more slowly than over short and medium distances (up to 300 km; where there is not much competition from other transport modes)
- International road haulage operations have higher growth rates than national haulage operations which can be attributed to the deepening of the EU's Single Market.
- The integration of the road haulage market in the EU also progresses: hauliers established neither in the country of loading nor in the country of unloading (i.e. those carrying out cross-trade and cabotage operations) accounted for 10.5% of all tonne-km in 2015, up from 7.8% in 2010
- National transport operations - which account for two thirds of all road haulage activity in the EU - are still predominantly carried out by domestic hauliers. While there is significantly more cabotage activity now than in the past, the share of foreign hauliers in all national transport operations is still only around 3%.
- No restrictions apply to international transport operations in the EU. Cross-trade activities (i.e. the carriage of goods from country A to country B by a haulier from country C) have doubled between 2005 and 2015; they now account for 21% of all international road haulage activities. More than 80% of all cross-trade activities are by hauliers from the Member States that joined the EU in 2004 or later.
- Almost 10% (in terms of weight) of all goods that are carried on the road across borders in the EU are moved between the Netherlands and Germany. Germany is one partner in 10 of the 20 country pairs between which most goods are carried inside the EU.
- There is a general eastward shift in activity: Hauliers from the Central and Eastern European Member States that joined the EU in 2004 or later show above average growth rates while hauliers from many other Member States reduce their activity. The share of hauliers from the "old" EU15 in total road haulage activity in the EU28 keeps shrinking; it has gone down from more than 82% in 2005 to less than 70% in 2015.
- Driver shortage leads to a strong increase in the number of drivers from non-EU countries being employed in the EU. The number of driver attestations issued to these drivers has almost doubled between 2014 and 2016 to around 76,000 (2.5% of the total workforce in the road haulage sector). Most of them are employed in Poland, Lithuania, Slovenia and Spain.
- Spectacular growth rates in the number of passengers using long-distance coach services are reported from countries where this market segment has recently been opened up. It not only creates business and jobs, but it also considerably increases the mobility of people who otherwise would not be able to afford long-distance journeys.

Introduction

Road transport is a crucial economic activity. It brings people together and it carries goods to where they are needed. Moreover, the provision of road transport services is an important economic sector in its own right. It provides employment to 5 million people (3 million carrying freight and 2 million carrying passengers (incl. taxis)) and generates a combined turnover of EUR 470 billion (EUR 330 billion in freight transport and EUR 140 billion in passenger transport (incl. taxis)).

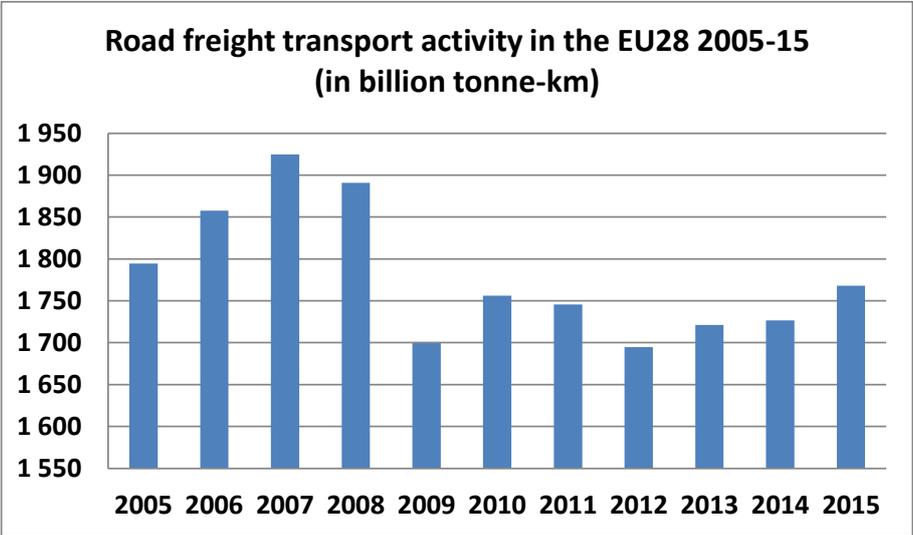
This report provides an overview of the current state of the road transport market in the EU using latest available statistics. Most of it is about road freight transport, a small section at the end deals with the provision of road passenger transport services by bus and coach in the EU.

1. Road freight transport in the EU

Most of the data used in this section have been provided by Eurostat. The Eurostat road haulage data are collected in accordance with Regulation (EU) No 70/2012 on statistical returns in respect of the carriage of goods by road. The reporting countries distribute questionnaires to a sample of vehicle holders recorded in their respective national vehicle registers. The authorities of each country therefore provide data on the activities of vehicles registered in their own country. To the extent that hauliers flag out (some of) their vehicles and have them registered in another Member State, the activities of vehicles registered in a given country may differ from the activities of hauliers established in that country. However, for ease of reading, the data from a given country are sometimes described as referring to the activities of the hauliers established in that country.

1.1 Current situation of the road haulage market in the EU

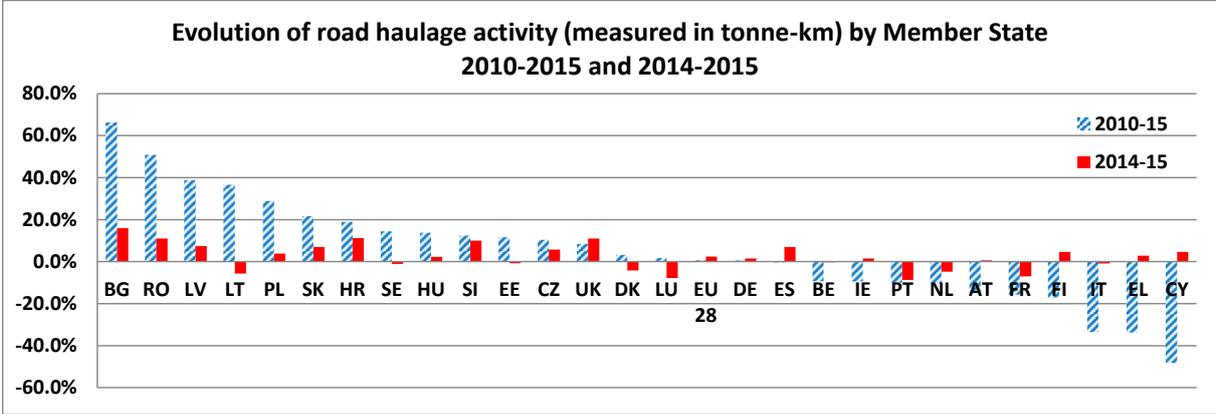
The road freight transport sector has still not fully recovered from the drop in activity in the wake of the financial and economic crisis of 2008/09. In 2015, road freight transport activity in the EU28 measured in tonne-km was still some 8% below the pre-crisis peak in 2007 and only slightly above the level in 2010.



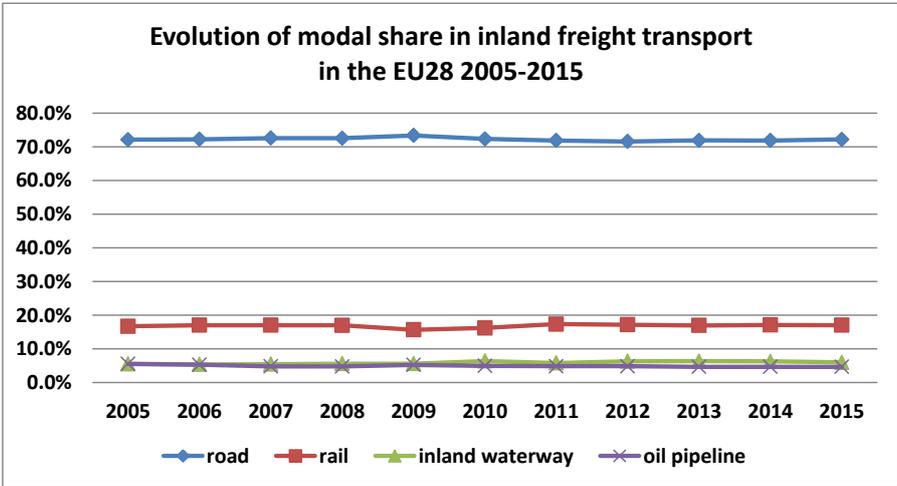
Recently, however, there has been some steady growth. From 2012 to 2015, road freight transport activity has grown by a total of 4.3%. In the first half of 2016, preliminary data from Eurostat suggest a pretty robust growth rate of around 6% compared with the same period in 2015.

The evolution of road freight transport activity over the last years has not been uniform across the EU. While at the EU level, the amount of tonne-km increased by 0.7% between 2010 and 2015, at the level of individual Member States, the growth rates range from +66% (Bulgaria) to -48% (Cyprus). With the exception of Cyprus (and Malta for which no data are available), all Member States which joined the EU in or after 2004 show above average growth rates. The above-average growth rate for Sweden between 2010 and 2015 is somewhat misleading as it is due to a methodological change in road freight transport statistics, not to developments on the ground.

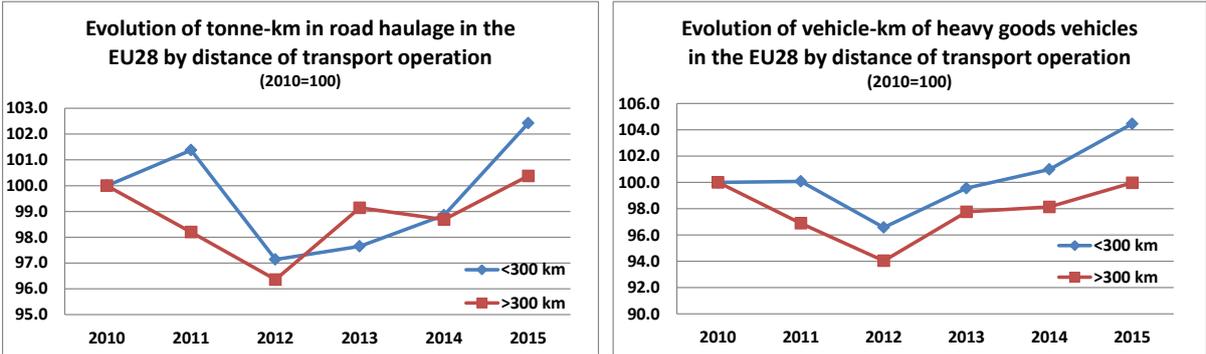
Between 2014 and 2015, road freight transport activities in the EU have grown by 2.4%. The growth rates of individual Member States range from +16% (Bulgaria) to -9% (Portugal). In absolute terms, the highest growth was recorded in the United Kingdom (+15.7 billion tonne-km) while the steepest fall was recorded in France (-11.6 billion tonne-km).



How has road performed compared with other modes? Judging from the evolution of the modal split, road transport has been developing in quite similar ways as the other inland transport modes. At 72%, the modal share of road transport in all inland freight transport activity in 2015 is the same as in 2005. It has not changed much in any of the last 10 years.

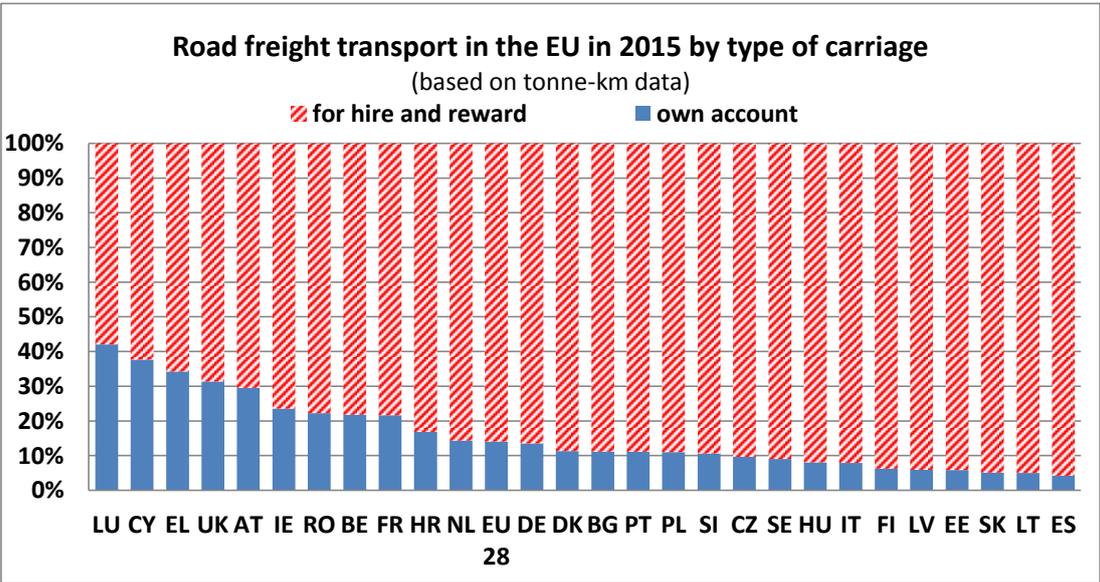


One of the goals in the 2011 White Paper "Roadmap to a Single European Transport Area - Towards a competitive and resource efficient transport system" (COM(2011) 144 final) is to shift 30% of road freight over 300 km to other modes such as rail or waterborne transport by 2030. While the modal split data above don't suggest any such shift (so far), road freight transport data indicate that the growth in long-distance road haulage operations (>300 km) has been somewhat slower than the growth in short- and medium-distance transport operations (up to 300 km). It is unclear, however, whether this development is due to some shift of long-distance transport activity from road to rail and other modes of transport or whether it can be explained by a stronger increase in demand for road haulage operations over short and medium distances than over long distances.



1.2 Market players in road freight transport in the EU

The figures above refer to all road haulage operations with vehicles registered in the EU, regardless of the identity of the operator. In terms of tonne-km, around 14% of all transport operations are carried out on own account, i.e. by companies carrying their own goods around. The remaining 86% are carried out by companies offering road haulage services for hire and reward. The split own account / for hire and reward has remained fairly stable over the last years. It is however quite different from one country to another: while in Luxembourg, Cyprus and Greece, more than a third of all tonne-km are from own account operations, in the Baltic States Estonia, Latvia and Lithuania as well as in Slovakia and in Spain, the corresponding share is below 6%.



Own account operators are mostly active on the national transport market of the country they are established in. In terms of tonne-km, 88% of their activities are national transport and only 12% are international transport (while the corresponding shares for transport operations provided for hire and reward are 61 and 39%). The share of own account operators in total national transport is around 19% while in international transport, they account for only 5% of total tonne-km. International transport operations are hence predominantly carried out by professional providers of road haulage services for hire and reward.

The road haulage sector in the EU

In 2014, there were **around 550,000 companies** in the EU providing road haulage services for hire and reward as their main business. Almost half of them were established in Spain (103,000), Poland (79,000) and Italy (69,000). The road haulage sector in the EU **employs around 3 million people** and generates a **turnover of some EUR 330 billion** (data for 2014). The number of enterprises is slightly going down suggesting some consolidation in the business. However, employment in the road haulage sector has remained fairly stable recently and turnover is on a slight upward trend.

The on average smallest enterprises can be found in Greece, Cyprus and Spain (with 3 or fewer persons employed per company) while the biggest ones are in Luxembourg, Germany, Lithuania, France and the Netherlands (with on average 10 or more persons employed per company). The EU-wide average is 5.2 persons employed per road haulage operator. However, the vast majority (>80%) of companies in the road haulage sector is below this average.

More drivers from non-EU countries

Companies active in road freight transport report an increasing shortage of drivers as many more drivers reach retirement age and leave the business than new ones are being trained to replace them. One of the consequences of driver shortage is that more and more drivers from non-EU countries are being employed in the EU. As each driver from a non-EU country active on the international road haulage market needs to be equipped with a driver attestation, the Commission has a fairly good overview of their overall numbers. At the end of 2016, around 76,000 driver attestations were in circulation, 46% more than at the end of 2015. It means that some 2.5% of all people employed in the road haulage sector are from a non-EU country. Most drivers from outside the EU are employed in the four countries Poland, Lithuania, Slovenia and Spain: 77% of all driver attestations valid at the end of 2016 were issued in these four countries.

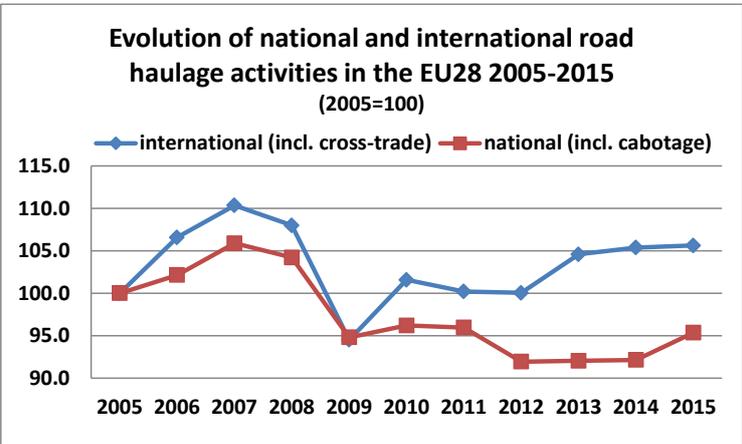
Community licence: access to the international road haulage market

As there were some 287,000 Community licences at the end of 2014 (289,000 at the end of 2016), roughly every second company active in the road haulage business has access to the international road haulage market in the EU. The number of Community licences has gone up recently (+6% between 2010 and 2016) suggesting more players are active in the international road haulage business in the EU. However, in some countries, national licences are being replaced by the Community licence (so there is only one licence for access to both the national and the international road haulage markets) which means that probably not all new holders of a Community licence are active in the provision of international road haulage services.

Each holder of a Community licence is entitled to a certified copy of that licence for each vehicle at his or her disposal. The number of certified copies thus corresponds to the number of vehicles that can be used to carry out international road haulage operations. Between 2010 and 2016, the number of certified copies has increased by 13% to 1.95 million. As close to 6 million heavy goods vehicles are registered in the EU, this means that every third of them is allowed to operate on the international road haulage market.

1.3 Market integration

Road haulage operations in the EU are becoming increasingly international. In terms of tonne-km, the share of international road haulage activities in all road haulage activities in the EU has gone up from 31% in 2005 to 33% in 2015. International haulage activities are growing faster than national haulage activities. National road haulage activities (incl. cabotage) are still at roughly the same level as in 2009, after the impact of the economic and financial crisis had hit the sector, while international road haulage activities (incl. cross-trade) have meanwhile gone up by 12%.



National transport - Cabotage

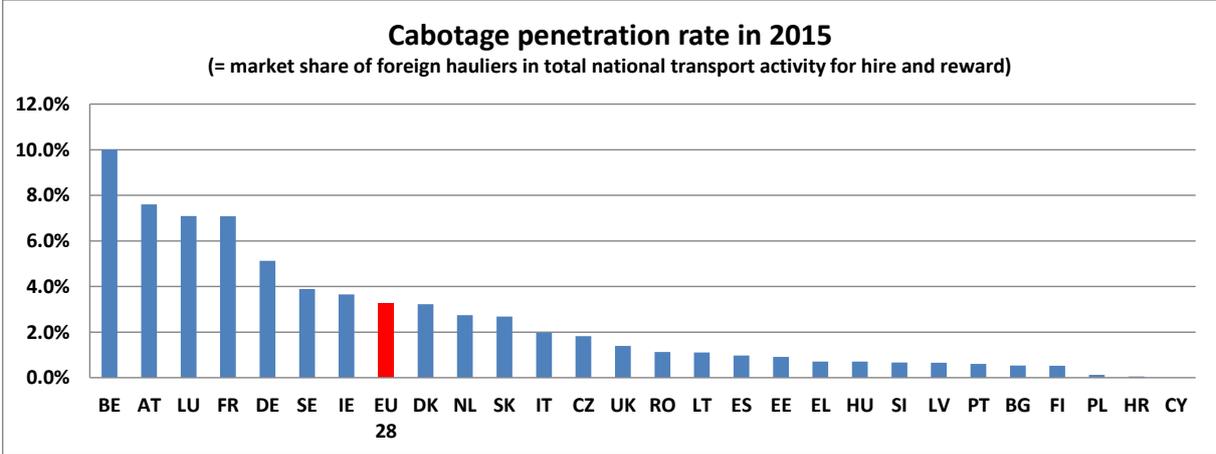
National transport accounts for around two thirds of total transport activity in the EU (in terms of tonne-km). In 2015, national transport by domestic hauliers accounted for about 65% of all transport activity in the EU. If cabotage (i.e. national transport by foreign hauliers) inside the EU is added, then national transport accounts for 67% of total transport activity.

National road haulage activities are still predominantly carried out by domestic hauliers. The share of operators from other Member States in all national road haulage operations is about 3%. While the share of cabotage is roughly 2.5 times higher than it was in 2005, it is still at a relatively low level overall. However, the situation differs a lot from one Member State to another, as the cabotage penetration rate shows.

When calculating the cabotage penetration rate, only road haulage operations for hire and reward are taken into account as relevant market. Cabotage operations themselves are usually carried out for hire and reward. Own account operations in the host Member States are off limits for operators from other Member States (as they are by definition carried out by the owners of the goods that are transported). Adding the cabotage activities in a host Member State to the national road haulage activities for hire and reward carried out by domestic operators in that country gives an idea of the

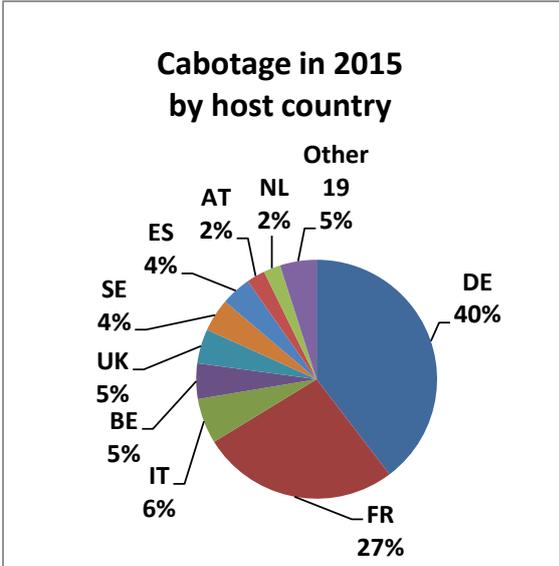
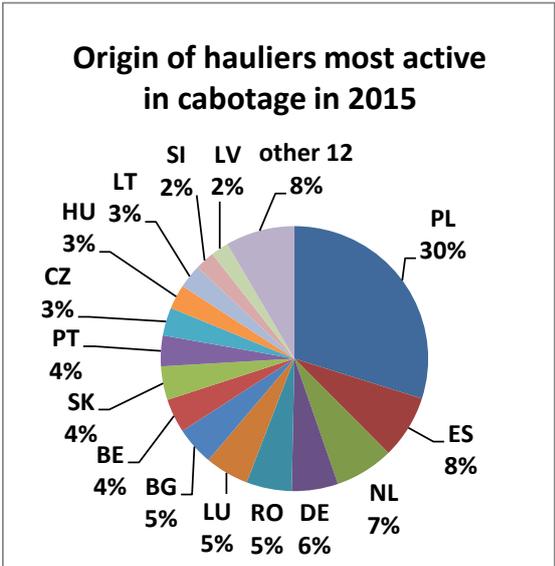
total market for national transport activities there. Dividing the cabotage activities by this total market size gives the cabotage penetration rate for each country.

In 2015, this cabotage penetration rate ranged from 10.0% in Belgium to 0.0% in Cyprus (and presumably Malta, for which, however, there are no data). The EU average rate was 3.3%. Seven countries, all long-standing members of the EU, have a cabotage penetration rate above this average.



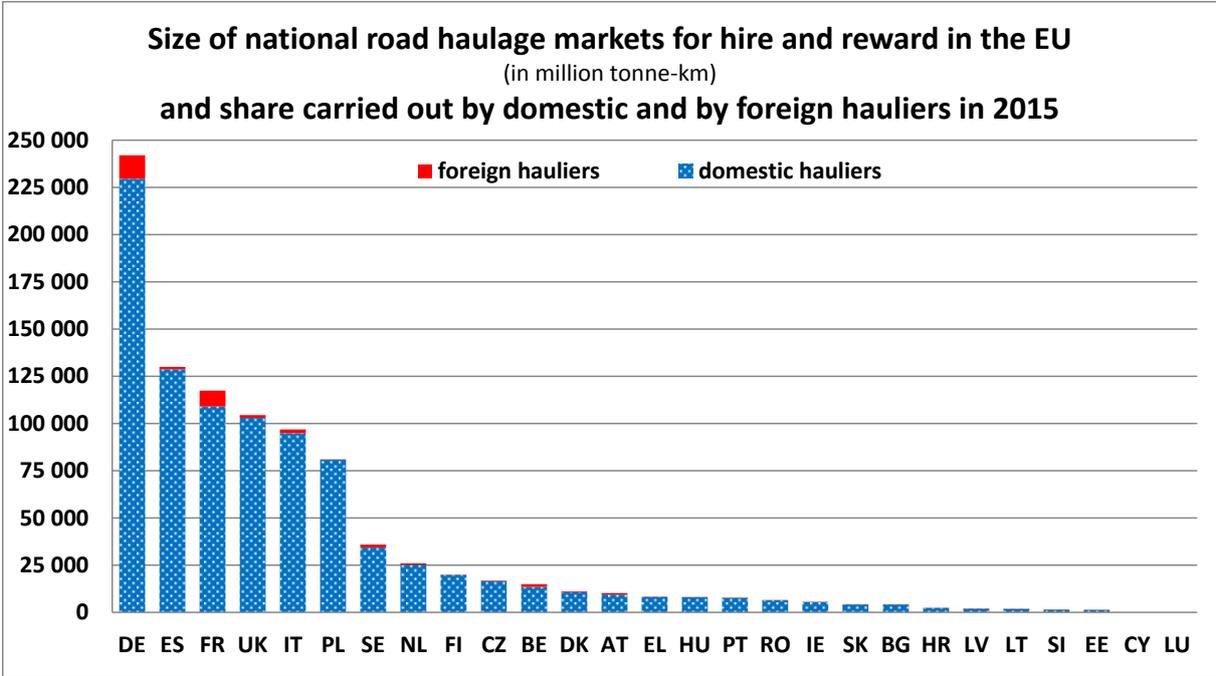
Luxembourg, which had the third highest cabotage penetration rate in 2015, was also to be found among the countries most active in carrying out cabotage operations in other Member States. In absolute terms, hauliers from the Grand Duchy carried out almost 100 times more cabotage (measured in tonne-km) in other Member States than hauliers from other Member States did cabotage in Luxembourg. This is just to prove that cabotage can be a two-way process, to the benefit of both sides.

Hauliers from Luxembourg rank on 6th place among the most active *caboteurs* in 2015. By far the most active hauliers active in cabotage come from Poland (30% in 2015), followed by Spain, the Netherlands and Germany. Together, hauliers from these four countries carried out half of all cabotage activities in the EU in 2015; three of them being so-called "old" Member States.



While the hauliers doing cabotage come from both old and new Member States, the host Member States for cabotage operations are predominantly to be found among the long-standing Member States. Only 2.5% of all tonne-km from cabotage operations were recorded in the new Member States in 2015. 40% of all cabotage activity in 2015 was carried out in Germany which however also has by far the biggest market for national road haulage operations for hire and reward (accounting for about a quarter of the EU total). Germany is followed by France among the most popular host countries for cabotage operations. Two thirds of all cabotage operations in the EU are carried out in Germany and France.

Spain, the United Kingdom and Italy, which have national road haulage markets for hire and reward of a similar size as France, are significantly less popular as cabotage host countries, probably partly due to their more peripheral location. Other important host countries are Belgium, Sweden, Austria and the Netherlands, which either have important sea ports and/or are located along important trade routes.



Cabotage is often carried out in neighbouring countries: in 2015, around 60% of all tonne-km from cabotage operations were by hauliers from surrounding Member States. In some Member States (in 2015: Slovakia, the Czech Republic, Latvia and Ireland), almost all tonne-km from cabotage (>90%) are generated by hauliers from neighbouring Member States. Hauliers from neighbouring countries accounted for about 75% of all tonne-km from cabotage activities in Germany, Belgium and Austria and close to 60% in France. However, in the more peripheral countries Italy, Sweden and the United Kingdom, most cabotage (>80% in terms of tonne-km) was carried out by hauliers from further afield.

International transport - Cross-trade

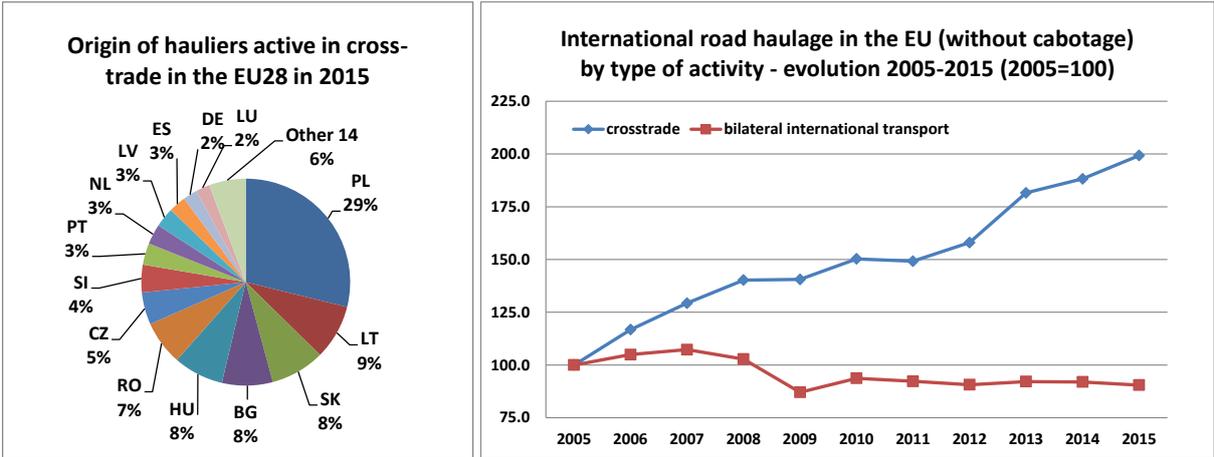
The deepening of the integration of the EU's Single Market contributes to higher growth rates for international road haulage operations than for national road haulage operations. Between 2005 and 2015, the amount of tonne-km from national road haulage activities (by domestic hauliers) has gone down by 6%, while those from international transport operations (incl. cabotage) have increased by

8%. If cabotage operations are counted among the national transport operations, then national road haulage activities (incl. cabotage) are still 5% below their corresponding level in 2005 while international road haulage activities (excl. cabotage) are some 6% above it.

International transport activities (without cabotage) are completely liberalised in the EU. Around 80% of all goods (in terms of tonnes) carried across borders are taken care of either by hauliers from the country of origin (i.e. where the goods are loaded) or from the country of destination (i.e. where they are unloaded). The remaining 20% of goods destined for another Member State are carried by a haulier who is neither from the country of origin nor from the country of destination. The carriage of goods from country A to country B by a haulier from country C is called "cross-trade".

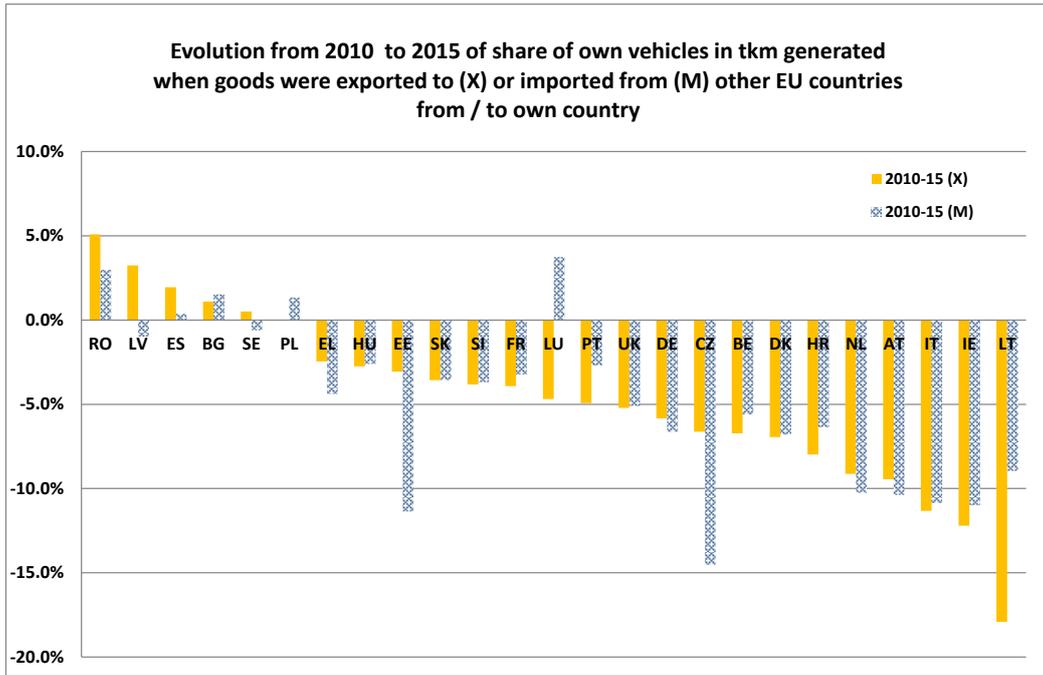
Cross-trade is the fastest growing market segment in road haulage in the EU. The tonne-km from cross-trade have doubled between 2005 and 2015. In 2015, they accounted for 21% of all tonne-km from international road haulage operations (without cabotage), up from 12% in 2005.

The hauliers most active in cross-trade come from Poland. In 2015, they accounted for almost a third (29%) of all cross-trade activity. The eight most important countries of origin of hauliers carrying out cross-trade activities are all "new" Member States, having joined the EU in 2004 or later. Together, they account for more than three quarters (78%) of all tonne-km from cross-trade activities in the EU in 2015.

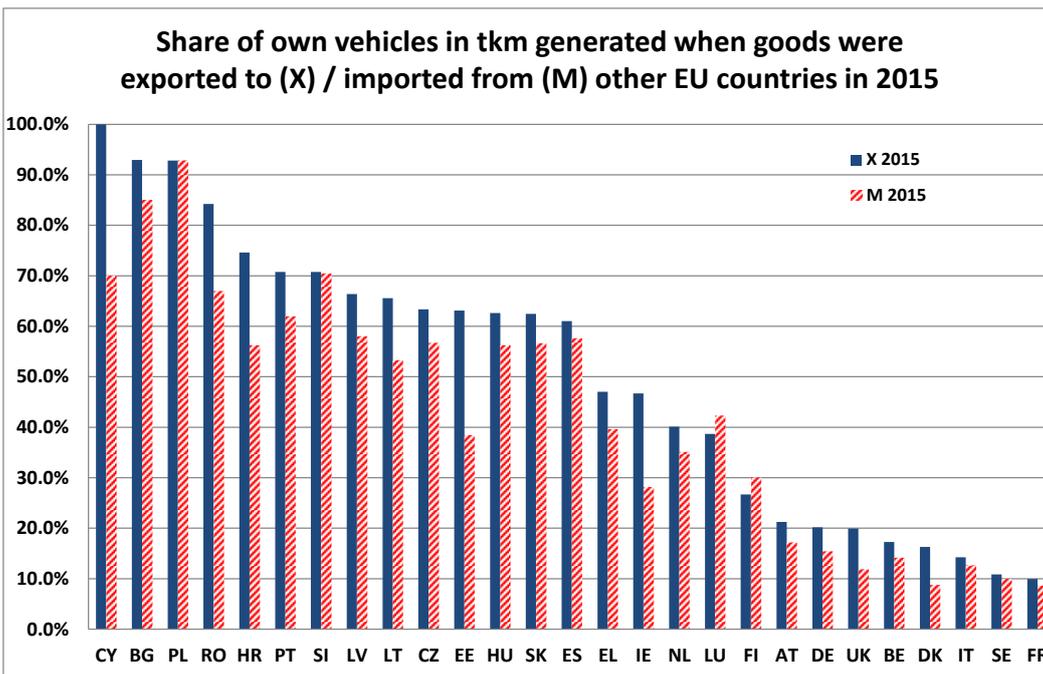


While cross-trade activities are booming, the international carriage of goods by hauliers from either the country of origin or the country of destination (what is called "bilateral international transport") is in decline: in 2015, it was some 9.5% below the level in 2005 and some 3.5% below the level in 2010.

This also helps explain why the share of vehicles registered in a given Member State in the tonne-km from exports to or imports from other Member States has gone down in most Member States between 2010 and 2015. Only hauliers from Romania, Latvia, Spain, Bulgaria, Sweden and Poland could either keep their respective market share between 2010 and 2015 or even increase it. (Data for Cyprus and Finland have not been taken into account as they show some erratic evolution due to small sample sizes; data for Malta are not available).



The share of a country's hauliers in the transport activities involving its own imports and exports may be regarded as a sign of the international competitiveness of a country's road haulage sector. Cyprus may be an exception as it is an island and not many foreign hauliers make their way to the eastern Mediterranean island. Similar considerations could apply to peripheral countries such as the Baltic States or Portugal. This notwithstanding, 12 of the 13 Member States with the highest shares for their own vehicles in transport activities involving export or import operations between their countries and other EU Member States are "new" Member States, having joined the EU in 2004 or later (all but Malta for which no data are available). With the exception of Portugal, all "old" Member States can be found on the right side of the graph, with lower market shares. The extreme cases are Sweden and France which have outsourced almost their complete import and export activities (some 90%...)



The relative shares above say little about the absolute size of the international intra-EU road haulage market. In 2015, 871 million tonnes of goods were moved across intra-EU borders over an average distance of 620 km, generating a total of 540 billion tonne-km (which, for comparison, is twice the size of the biggest national road haulage market in the EU, the one of Germany). Not all borders have been crossed by the same amount of goods though. The top-20 country pairs account for around two-thirds (some 580 million tonnes) of all goods moved between EU countries. Germany features in 10 of the top-20 country pairs either as country of origin or as country of destination of the haulage activity.

The busiest border is the one between Germany and the Netherlands, across which some 85 million tonnes were moved on the road in 2015. On aggregate, 26% of them were carried by German hauliers, 60% by Dutch hauliers and the remaining 14% by hauliers from another country. For the latter, carrying goods between Germany and the Netherlands is cross-trade. The most important cross-trading country between Germany and the Netherlands in 2015 was Poland. Poland is the most important cross-trader in 9 of the top-20 country pairs, which goes some way to explain its pre-eminent cross-trading position (see above).

TOP-20 international intra-EU road haulage flows in 2015														
Rank	country A	country B	total mio tonnes	of which from A to B					biggest 3rd country	of which from B to A				
				mio tonnes	of which carried by hauliers from A	of which carried by hauliers from B	of which carried by hauliers from 3rd country	mio tonnes		of which carried by hauliers from B	of which carried by hauliers from A	of which carried by hauliers from 3rd country	biggest 3rd country	
1	DE	NL	84.9	43.2	29.8%	57.3%	12.9%	PL	41.7	61.5%	22.9%	15.6%	PL	
2	BE	FR	51.9	30.4	43.4%	27.1%	29.5%	LU	21.6	25.6%	40.6%	33.7%	LU	
3	NL	BE	51.6	26.7	73.8%	16.6%	9.7%	PL	24.9	22.3%	67.0%	10.7%	PL	
4	PL	DE	50.0	27.0	95.9%	3.4%	0.7%	LT	22.9	6.8%	92.4%	0.8%	HU	
5	DE	FR	45.0	23.8	42.8%	14.4%	42.8%	PL	21.3	17.7%	39.2%	43.2%	PL	
6	BE	DE	39.0	19.8	18.0%	34.9%	47.1%	PL	19.2	40.8%	13.9%	45.3%	NL	
7	ES	FR	38.1	20.6	84.4%	5.9%	9.7%	PT	17.5	6.4%	79.7%	13.9%	PT	
8	DE	AT	34.8	20.3	39.0%	30.6%	30.4%	HU	14.5	37.3%	30.2%	32.5%	HU	
9	CZ	DE	29.9	17.3	73.2%	17.1%	9.7%	PL	12.6	11.7%	75.7%	12.6%	PL	
10	IT	DE	19.8	10.1	21.1%	27.6%	51.3%	PL	9.7	33.1%	19.9%	47.0%	PL	
11	ES	PT	19.5	11.2	43.7%	55.7%	0.6%	-	8.3	55.1%	44.2%	0.6%	-	
12	IT	FR	17.3	9.3	39.6%	25.8%	34.6%	PL	8.0	26.0%	38.4%	35.6%	PL	
13	NL	FR	16.2	9.5	57.0%	10.6%	32.4%	BE	6.7	10.2%	53.1%	36.6%	PL	
14	PL	CZ	14.6	8.4	84.8%	14.1%	1.1%	-	6.1	10.4%	88.7%	1.0%	-	
15	SK	CZ	13.6	6.9	51.6%	46.8%	1.6%	-	6.8	57.8%	38.6%	3.6%	PL	
16	UK	IE	12.6	7.4	70.7%	27.8%	1.5%	-	5.2	51.5%	47.7%	0.8%	-	
17	ES	DE	11.9	6.5	65.8%	5.2%	28.9%	PL	5.3	7.1%	59.3%	33.6%	PL	
18	AT	IT	10.9	6.5	34.8%	19.3%	46.0%	SI	4.4	21.5%	33.6%	44.8%	SI	
19	DE	DK	10.7	5.6	63.1%	7.9%	29.0%	PL	5.1	13.4%	55.0%	31.6%	PL	
20	DE	LU	7.9	5.2	53.5%	36.2%	10.3%	NL	2.7	47.8%	37.2%	15.1%	NL	

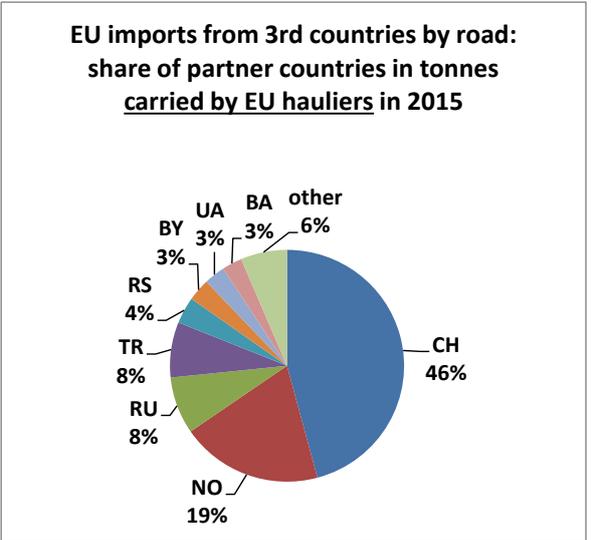
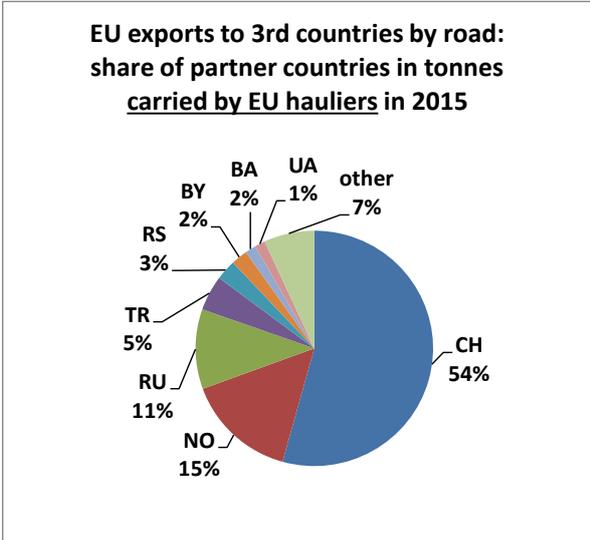
Note: "-" means "not available".

1.4 Extra-EU activities of EU hauliers

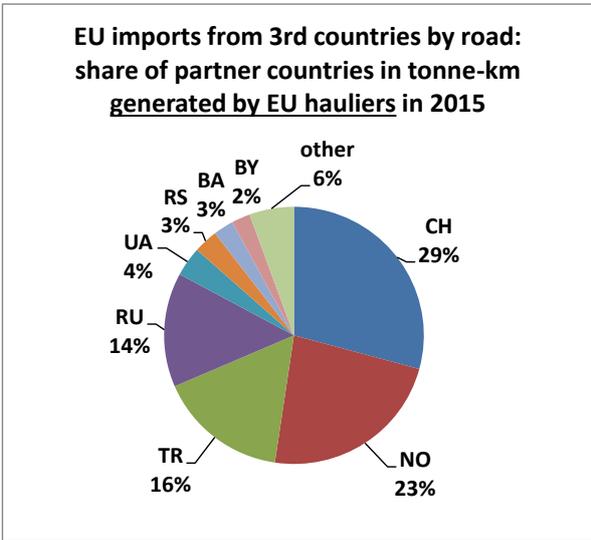
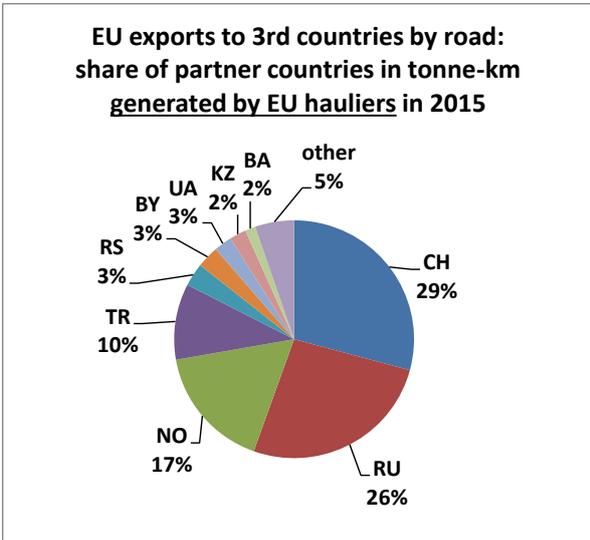
In 2015, EU hauliers carried almost 42 million tonnes of goods from the EU to a country outside the EU and about half as much (21 million tonnes) from a non-EU country to an EU country. In addition, they carried almost 800,000 tonnes from one non-EU country to another non-EU country (i.e. cross-trade outside the EU) and 3 million tonnes within a non-EU country (40% of which in Norway where cabotage is allowed to some extent under Regulation (EC) No 1072/2009).

International road haulage operations within the EU and EFTA are completely liberalised, through Regulation (EC) No 1072/2009, the EEA Agreement of 1992 and the Land Transport Agreement between the EU and Switzerland of 1999. Geographic proximity and market liberalisation mean that, in terms of weight, around 70% of all goods carried by EU hauliers from an EU country to a non-EU country go to an EFTA country while some 66% of all goods carried by an EU haulier from a non-EU country to an EU country come from an EFTA country. Switzerland is by far the most important partner country, accounting for more than half (54%) of all exports from the EU to a non-EU country carried by EU hauliers and almost half (46%) of all imports to the EU from a non-EU country.

Outside EFTA, the most important partner countries are Russia (RU), Turkey (TR), Serbia (RS), Belarus (BY), Bosnia and Herzegovina (BA) and the Ukraine (UA). It should be noted that Russia's share in particular in EU exports by road is somewhat subdued due to the trade sanctions and counter-sanctions that have been imposed following the annexation of Crimea in 2014.



When looking at the tonne-km generated when goods are exported to a non-EU country or imported from a non-EU country, the relative importance of countries with economic hubs further away from those in the EU increases. This phenomenon is particularly visible in the cases of Russia and Turkey whose relative shares are roughly twice as high.



The share of EU hauliers in total road haulage activities between the EU and non-EU countries is mostly not known as the corresponding data from non-EU hauliers are not available. The exceptions are Switzerland and Norway which provide Eurostat with the necessary information. In the case of Switzerland, EU hauliers (mainly from Germany and Poland) account for 88% and 87% of the tonne-km from the carriage of EU exports to Switzerland and EU imports from Switzerland respectively. In the case of Norway, the corresponding shares of EU hauliers (mainly from Poland and Sweden) are 82% for EU exports to Norway and 70% for EU imports from Norway. The relatively high share of EU hauliers in the road haulage relations with both countries can be explained by the fact that both Switzerland and Norway are relatively high-cost countries. The share of EU hauliers is likely somewhat lower in the relations with the other partner countries.

1.5 Average loading weight

The average loading weight of the vehicles used in road freight transport in the EU has not changed much in recent years. In fact, at 13.7 tonnes it was the same in 2015 as in 2008. There is a clear difference between the average loading weight of vehicles used for hire and reward and of those used for own account operations. Vehicles used by companies specialised in the provision of road haulage services for hire and reward tend to have an average loading weight that is almost twice as high (15.0 tonnes) as the corresponding value of vehicles used for own account operations (8.9 tonnes). The difference seems logical as for own account operators the carriage of (their own) goods is but an ancillary activity while for operators providing road haulage services for hire and reward it is the main activity. It is not clear to what extent the difference can be explained by different types of vehicles being used for own account operations on the one hand and for operations for hire and reward on the other hand. It is conceivable that on average smaller vehicles are being used for own account operations.

The average loading weight is around a quarter higher for international transport operations (15.9 tonnes) than it is for national transport operations (12.7 tonnes). Also here, there has been virtually no change over the last years. The usually longer distances on international road haulage operations make it economically particularly worthwhile to carry more goods per journey than over shorter distances. Again, it is not clear to what extent this difference is due to differently sized vehicles being used. It is conceivable that on average bigger heavy goods vehicles are used for international road haulage operations than for national operations.

Average loading weight by type of operation and type of transport in 2015			
	own account	for hire and reward	total
national	8.6 t	14.4 t	12.7 t
international	13.0 t	16.1 t	15.9 t
total	8.9 t	15.0 t	13.7 t

Given that the maximum authorised (gross) weight of a vehicle in international traffic in the EU is 40 tonnes (44 tonnes for the road leg of an intermodal transport operation), there still seems to be some scope to increase the load factor. It should however be noted that not all vehicles used for the

carriage of goods by road are vehicles with the maximum possible vehicle weight (although around 70% of the total mileage of heavy goods vehicles is carried out by vehicles with a maximum mass above 30 tonnes). Moreover, when loading their vehicles, hauliers are often more restricted by the volume of the goods than by the weight.

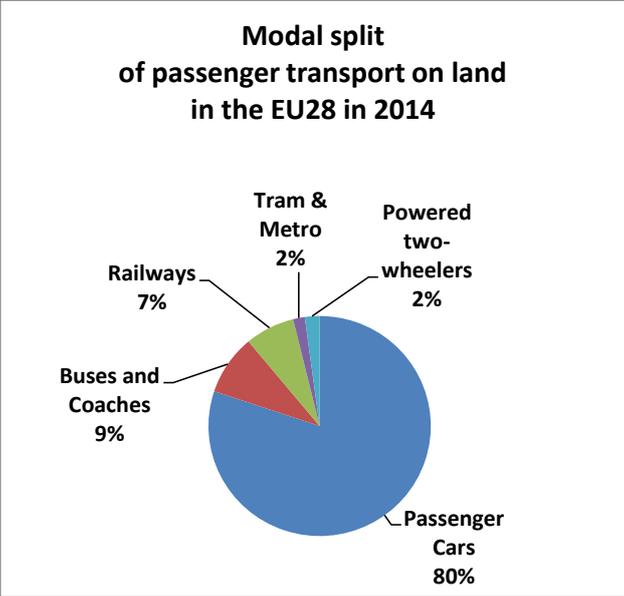
1.6 Empty runs

Empty runs are a waste of resources and the common transport policy of the EU aims at reducing them as much as possible. In some cases, empty runs cannot be avoided for technical or operational reasons (e.g. a milk truck or a waste truck). Empty runs should however not be due to market restrictions. One of the reasons for allowing cabotage operations in the EU to some extent, for instance, was to reduce the amount of empty runs of vehicles active in international road haulage operations.

In 2015, some 23% of all vehicle-km by heavy goods vehicles in the EU were empty runs. Over the last 10 years, the share of empty runs has gone down by 2 percentage points. In national transport, some 26% of all vehicle-km were empty while only 14% of all vehicle-km in international transport operations were empty. International transport appears therefore to be somewhat more efficient than national transport. However, transport operations with technical or operational restrictions to carry a return load (see above) tend to be more prevalent in national transport than in international transport.

2. Road passenger transport in the EU

The EU statistics on passenger transport by road are very sketchy. There is no EU legal act that would provide for the collection of harmonised and comparable data on road passenger transport services from the Member States of the EU, although passenger transport using buses and coaches is as important as passenger transport by rail (incl. urban rail (tram and metro)).



2.1 Market players in road passenger transport in the EU

There are about 362,000 enterprises in the EU whose main activity is to carry passengers on road. 83% of them, or 302,000 enterprises, provide taxi services, meaning that there are some 60,000 companies active in the carriage of passengers by coach and bus (which is the focus of this chapter). Around 13,000 of them provide mainly urban and suburban transport services while 47,000 are specialised in other services (e.g. long-distance services, occasional services, airport shuttles etc.). Companies which provide mainly urban and suburban services employ some 910,000 people (on average 70 per enterprise) while those predominantly active in the provision of other bus and coach services employ around 540,000 people (on average 11.5 per enterprise).

In 2014, the 13,000 companies providing urban and suburban passenger transport services by road generated a turnover of EUR 80.9 billion (on average EUR 6.2 million per enterprise); those predominantly offering other road passenger transport services generated a combined turnover of EUR 35.5 billion (on average around EUR 750,000 per enterprise).

Community licence: access to the international market for coach and bus services

International road passenger transport services are mostly carried out by the 47,000 companies predominantly active in long-distance services, occasional services etc. At the end of 2016, some 34,500 carriers had been issued a Community licence which provides access to the international market for coach and bus services in the EU. This means that almost three out of four (73%) companies predominantly active in the provision of other than urban and suburban passenger transport services by bus and coach should have a Community licence. Some Community licences may however also have been issued to companies who provide international bus and coach services only as ancillary business and are hence statistically recorded in other sectors.

At the end of 2016, there were around 300,000 certified copies of the Community licence in road passenger transport by bus and coach, covering roughly 36% of the total fleet of 830,000 buses and coaches in the EU.

2.2 Road passenger transport services by bus and coach

In 2014, buses and coaches in the EU are estimated to have generated some 525 billion passenger-km, 9% of all land passenger transport modes. Due to methodological changes in some Member States, the 2014 data and estimates cannot be compared with those of earlier years.

Regular long-distance services have seen some particularly strong growth rates over the last years in countries which have opened up this market segment. In Germany, statistics provided by Destatis (the Federal Statistical Office of Germany) suggest that the opening of the respective market in 2013 led to an increase in the number of passengers on long-distance regular services by bus and coach from 2.5 million in 2012 to 20.3 million in 2015 (+712%).

In France, the opening of the market for regular long-distance services by coach in August 2015 is showing similar results: according to data provided by the regulatory authority ARAFER, the number of passengers on interurban coach services has grown by +143% between the fourth quarter of 2015 and the fourth quarter of 2016.