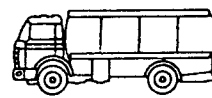


EUROPEAN COMMUNITIES

# EUROPA TRANSPORT



OBSERVATION OF TRANSPORT MARKETS

## ANALYSIS AND FORECASTS

### 1987



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ANALYSIS AND FORECASTS REPORT

INTRODUCTORY NOTE

The present report differs considerably from its predecessors. Previous reports have presented forecasts for each of 3 modes for all international intra EUR-10 relationships and the forecasts have been prepared on the basis of analysis at the 10 NST Chapter level. Up to 1985 the basic work was done by consultants but the actual report was prepared by Commission officials. In 1986 the work was transferred into the Commission, but the results were available very late and the figures at the NST level were inadequate. It was thus finally decided not to publish the 1986 Analysis and Forecast Report.

Changes in personnel have made it impracticable to reestablish a useful model along the traditional lines in time for the 1987 Analysis and Forecast Report. It has thus been decided to produce a report of a completely different style which relates only to road transport and, in particular, the share of the Community Quota in international intra-Community transport, an important structural problem following the Council's decision to increase the Community Quota by 40 % per annum.

It is hoped that readers will welcome this departure to look at a more topical issue. Any comments from readers will be welcome.

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## CHAPTER I

### Trends in road transport activity, 1981-1984

#### 1.1 Introduction

As explained in section 6.1 of the 1984 Annual Report, an analysis of national and international transport is best carried out in tonne-kilometres rather than tonnes especially for the road sector. It has also been shown (in section 2.3.2 of the 1985 Annual Report) that the average distance under a Community Quota authorization is about twice that of all "hire and reward" movements; this again reinforces the reason for using tonne-kilometres rather than tonnes in the analysis in this Report.

In its Report to the Council on the Market Observation System in October 1984, the Commission indicated a number of improvements that it was seeking in the Road Directive. Particularly relevant to this Report were the introduction of quarterly statistics and "cross-trades" (carriage by hauliers of Member State A from Member State B to Member State C), indeed an extension to "cross-trades" was foreseen in the Commission's earlier Report to the Council on the Road Directive in May 1983. Unfortunately progress on these extensions has not been as fast as was anticipated so that only annual "bilateral" data is currently available through the Statistical Office of the European Communities (SOEC).

Partial data on "cross-trades" is available through the Community Quota Statistics but information from Belgian and Dutch sources suggest that only about half of the "cross-trades" in 1984 were carried out under Community Quota authorizations.

Data from the Road Directive (78/546) is available since 1980, but as Greece joined the Community in 1981, the analysis is simplified by starting from 1981. At the time of writing, March 1987, the 1985 data required by the Directive is still being checked by the SOEC. It is thus only possible to examine the overall trends from 1981 to 1984.

## 1.2 Overall trends in international intra-Community road haulage, 1981-1984

Table 1.1 shows the overall trends in international intra-Community tonne-kilometres carried out by road hauliers from each Member State on bilateral movements, i.e. cross-trades and movements by hauliers from non-Member States are excluded. The former are estimated at about 4 % of all bilateral t-km in 1984 but are expected to increase fairly rapidly with the expansion of the Community Quota; the latter are only important on specific routes, e.g. German/Italy where 15-20 % of tonnage is carried by Austrian and Swiss hauliers, and Germany/Greece where 10 % of tonnage is carried also by non-Member State hauliers (see pages 19 and 20 of 1983 Annual Report).

Table 1.1 shows that there was an overall increase of 18.3 % in international intra-Community transport between 1981 and 1984 (5.8 % per annum). Growth was particularly strong for the peripheral Member States (GR, IRL and UK), Belgium and the Netherlands. These growth rates are quite impressive when compared to the 3.7 % increase in EUR-10 Gross Domestic Product volume from 1981 to 1984.

**Table 1.1** Tonne-kilometres achieved by each nationality of hauliers on international intra EUR-10 traffic (x mio t-km)

Nationality of haulier	1981	1982	1983	1984	% change 84/81
D	14077	15638	16162	16780	+ 19.2
F	14065	12761	13428	15115	+ 7.5
I (a)	14000	14037	15491	15223	+ 8.7
NL	12651	14206	15115	16255	+ 28.5
B	7906	8650	8785	10053	+ 27.2
L (b)	441	449	449 <sup>p</sup>	449 <sup>p</sup>	-
UK	2679	2873	3449	3511	+ 31.1
IRL	373	417	546	494	+ 32.4
DK	3349	3589	3902	3912	+ 16.8
GR	1742	2306	2718	2516	+ 44.4
EUR-10	71283	74926	80045	84308	+ 18.3
Annual change	+ 5.1%	+ 6.8%	+ 5.3%		

### Notes

- (a) I figures based on tonnages from Italian foreign trade statistics, distances assumed to be the same as partner Member State for each relation.
- (b) L figures for 1982 have been corrected by SOEC, 1981 is an estimate (average of 1980 and 1982), 1983 and 1984 are provisional figures based on 1982.

1.3 Overall trends for "Hire and Reward" and "Own Account" in international intra-Community road haulage, 1981-1984

Table 1.2 shows that "own account" t-km was stable from 1981 to 1983 but as "hire and reward" t-km rose sharply, the share of "own account" fell. In 1984, "own account" t-km jumped nearly 15 % (well above "hire and reward", just under 4 %) so that "own account" share recovered most of the loss observed from 1981 to 1983.

Table 1.3 corresponds to Table 1.1 except that it refers to "Hire and Reward" hauliers only. As "Hire and Reward" is over 85 % of the total market, the percentage changes are generally similar to those of Table 1.1.

"Hire and Reward" figures are presented, however, since these are needed in connection with the analysis of the Community quota.

To follow the evolution of the share between "Hire and Reward" and "Own Account" it is easier to consider the "Own Account" (with percentages around 15 %) rather than the "Hire and Reward"; these are shown in Table 1.4. Most Member States show a declining or stable share of "Own Account" except for France, where the downward trend was abruptly reversed in 1984.

Table 1.2 Tonne-kilometres by "Hire and Reward" hauliers and by "Own Account" hauliers (x mio t-km)

Type of carrier	1981	1982	1983	1984	% change 84/81
Hire and Reward (Annual Change)	60653 (+6.0%)	64271 (+8.1%)	69490 (+3.9%)	72202	+ 19.0
Own Account (Annual Change)	10630 (+0.2%)	10655 (-0.9%)	10555 (+14.7%)	12106	+ 13.9
Total (Annual Change)	71283 (+5.1%)	74926 (+6.8%)	80045 (+5.3%)	84308	+ 18.3
Share of Own Account	14.9%	14.2%	13.2%	14.4%	



**Table 1.3** Tonne-kilometres achieved by each nationality of haulier on international intra EUR-10 traffic by "Hire and Reward" hauliers (x mio t-km).

Nationality of haulier	1981	1982	1983	1984	% change 84/81
D	12208	13731	14236	14792	+ 21.2
F	12260	11261	11881	12922	+ 5.4
I (a)	11928	12058	13463	13047	+ 9.4
NL	11057	12568	13368	14518	+ 31.3
B	5463	6010	6401	6936	+ 27.0
L	352 <sup>e</sup>	323	323 <sup>p</sup>	323 <sup>p</sup>	-
UK	2422	2539	3151	3168	+ 30.8
IRL	320	356	458	451	+ 40.9
DK	2901	3119	3491	3529	+ 21.6
GR	1742	2306	2718	2516	+ 44.4
EUR-10	60653	64271	69490	72202	+ 19.0
Annual Change	+ 6.0%	+ 8.1%	+ 3.9%		
EUR-10 excl. I and L	48373	51890	55704	58832	+ 21.6

Notes: As per Table 1.1, but additionally, I "Hire and Reward" share assumed to be Community average each year in absence of any other information.

e = estimate  
p = provisional

**Table 1.4** Percentage share of Own Account for each nationality of haulier in international intra EUR-10 traffic

Nationality of haulier	1981	1982	1983	1984	Difference 84/81
D	13.3	12.2	11.9	11.8	- 1.5
F	12.8	11.8	11.5	14.5	+ 1.7
I	-	-	-	-	-
NL	12.6	11.5	11.6	10.7	- 1.9
B	30.9	30.5	27.1	31.0	+ 0.1
L	-	28.0	-	-	-
UK	9.6	11.6	8.6	9.8	+ 0.2
IRL	14.2	14.6	16.1	8.7	- 5.5
DK	13.4	13.1	10.5	9.8	- 3.6
GR	0	0	0	0	0
EUR-10	14.9	14.2	13.2	14.4	- 0.5
Annual difference	- 0.7	- 1.0	+ 1.2		

#### 1.4 Overall trends in national road haulage, 1981-1984

Table 1.5 shows that the overall increase of national transport in the Community between 1981 and 1984, 4.6 %, is very much smaller than for international transport, 18.3 %. Only for Italy (where the figures should be treated with some reserve) is the increase in national transport similar to international transport; indeed, the increase for the Rest of the Community (without Italy) is only 3.0 %.

Table 1.6 presents similar figures to Table 1.5, but for "Hire and Reward" only. In this table Italy and Luxembourg (except for 1982) have been omitted. The overall increase, 3,6 %, is slightly higher than for "Hire and Reward" + "Own Account" when Italy (and Luxembourg) are omitted (+ 3.0 %). "Hire and Reward" has done worse than "Own Account" in Germany and France, equally well in Netherlands and better in the other Member States.

These results are confirmed in Table 1.7 which shows that in Germany and France "Own Account" improved their share by 1.5%, Netherlands was stable, and other Member States showed falls. The overall trend of "Own Account" for the whole Community has been steadily down with the main drop occurring between 1982 and 1983.

Table 1.5 Tonne-kilometres achieved by each nationality of haulier on national traffic (x mio t-km)

Nationality of haulier	1981	1982	1983	1984	% change 84/81
D	94815	91935	95263	97708	+ 3.1
F	78929	77070	78186	78648	- 0.4
I (a)	115100	123063	127909	125277	+ 8.8
NL	17481	17595	17106	18123	+ 3.7
B	10060	10201	9910	10684	+ 6.2
L	271e	263	263p	263p	-
UK	94800	91800	92300	98924	+ 4.4
IRL	4303	4042	3989	3970	- 7.7
DK	7121	6969	7250	7709	+ 8.3
GR	8235 (b)	8522	8029	9540	+ 15.8
EUR-10	431115	431460	440205	450846	+ 4.6
Annual Change	+ 0.1%	+ 2.0%	+ 2.4%		
EUR-10 excl. I and L	315744	308134	312033	323306	+ 3.0

Notes: (a) Italian figures are estimates based on the difference between the total tonne kilometres in Italy as reported to European Conference of Ministers of Transport (ECMT) and the international tonne-kilometres estimated for Italian hauliers, Table 1.1.

(b) Greek figure for 1981 is estimated by factoring down the 1982 Statistical Directive figure (8522) by the ratio of the 1981 to 1982 figures for total tonne-kilometres in Greece as reported to ECMT.

**Table 1.6** Tonne-kilometres achieved by each nationality of haulier on national traffic by "Hire and Reward" hauliers. (x mio t-km)

Nationality of haulier	1981	1982	1983	1984	% change 84/81
D	55093	53296	54765	55355	+ 0.5
F	45926	44648	45844	44632	- 2.8
I	-	-	-	-	-
NL	11358	11115	10686	11762	+ 3.6
B	4551	4842	4551	4923	+ 8.2
L	-	45	-	-	-
UK	58600	57400	58900	63243	+ 7.9
IRL	1469	1408	1323	1436	- 2.2
DK	4830	4676	4974	5531	+ 14.5
GR	5461 (b)	5652	5809	7089	+ 29.8
EUR-10 excl. I and L	187288	183037	186852	193971	+ 3.6
Annual change	- 2.3%	+ 2.1%	+ 3.8%		

Notes: (b) See note (b) on Table 1.5

**Table 1.7** Percentage Share of Own Account for each nationality of haulier in national traffic. (in t-km)

Nationality of haulier	1981	1982	1983	1984	Difference 84/81
D	41.9	42.0	42.5	43.4	+ 1.5
F	41.8	42.1	41.4	43.3	+ 1.5
I	-	-	-	-	-
NL	35.0	36.8	37.5	35.1	+ 0.1
B	54.8	52.5	54.1	53.9	- 0.9
L	-	82.9	-	-	-
UK	38.2	37.5	36.2	36.1	- 2.1
IRL	65.9	65.2	66.8	63.8	- 2.1
DK	32.2	32.9	31.4	28.3	- 3.9
GR	(33.7)	33.7	27.6	25.7	- 8.0
EUR-10 excl. I and L	40.7	40.6	40.1	40.0	- 0.7
Annual Difference	- 0.1	- 0.5	- 0.1		

## 1.5 Overall trends of national and international intra-Community road haulage, 1981-1984

Table 1.8 combines the figures for national road transport (Table 1.5) and international intra-Community road transport (Table 1.1). The overall increase, 6.5 %, is closely linked to the increase for national transport which accounts for about 85 % of the total t-km at Community level.

Table 1.9 shows the relative importance of international intra-Community transport for hauliers of each Member State. While these results are not particularly surprising it is thought that these facts have been quantified before. Evidently "small" Member States are more likely to be involved in international transport. In the Benelux, Netherlands and Belgium have almost already reached the 50 % level, while Luxembourg is over 60 %. The very low figure for United Kingdom, 3 %, is much lower than any other Member State but one must remember that the Directive results do not contain unaccompanied semi-trailers (about half the cross-channel traffic). All Member States show an increasing importance for international transport in 1984 as compared to 1981.

Table 1.10 resembles Table 1.8 except that it relates only to "Hire and Reward" hauliers. The overall increase is 7.3 %, slightly greater than that for "Hire and Reward + Own Account" (5.7 % when Italy and Luxembourg are excluded).

Table 1.11 resembles Table 1.9 except that it only relates to "Hire and Reward" hauliers. It can be seen that, generally, international transport is more important for "Hire and Reward" hauliers (23.3 % in 1984) than for "Hire and Reward + Own Account" (15.8 % in 1984). Again all Member States show an increasing importance for international.

**Table 1.8** Tonne-kilometres achieved in national and international intra-Community transport for each nationality of haulier.  
( x mio t-km)

Nationality of haulier	1981	1982	1983	1984	% change 84/81
D	108892	107573	111425	114488	+ 5.1
F	92994	89831	91614	93763	+ 0.8
I	129100	137100	143400	140500	+ 8.8
NL	30132	31801	32221	34378	+ 14.1
B	17966	18851	18695	20737	+ 15.4
L	712 <sup>e</sup>	712	712 <sup>p</sup>	712 <sup>p</sup>	-
UK	97479	94673	95749	102435	+ 5.1
IRL	4676	4459	4535	4464	- 4.5
DK	10470	10558	11152	11621	+ 11.0
GR	9977	10828	10747	12056	+ 20.8
EUR-10	502398	506386	520250	535154	+ 6.5
Annual change	+ 0.8%	+ 2.7%	+ 2.9%		
EUR-10 excl. I and L	372586	368574	376138	393942	+ 5.7

Notes: e = estimate  
p = provisional

**Table 1.9** Importance of international intra-Community transport for each nationality of haulier:

(  $\frac{\text{International t-km}}{\text{National t-km} + \text{International t-km}}$  as% )

Nationality of haulier	1981	1982	1983	1984	Difference 84/81
D	12.9	14.5	14.5	14.7	+ 1.8
F	15.1	14.2	14.7	16.1	+ 1.0
I	10.8	10.2	10.8	10.8	0
NL	42.0	44.7	46.9	47.3	+ 5.3
B	44.0	45.9	47.0	48.5	+ 4.5
L	(61.9)	63.1	(63.1)	(63.1)	-
UK	2.7	3.0	3.6	3.4	+ 0.7
IRL	8.0	9.4	12.0	11.1	+ 3.1
DK	33.3	34.0	35.0	33.7	+ 0.4
GR	17.5	21.3	25.3	20.9	+ 3.4
EUR-10	14.2	14.8	15.4	15.8	+ 1.6
Annual difference	+ 0.6	+ 0.6	+ 0.4		
EUR-10 excl. I and L	15.3	16.4	17.0	17.4	+ 2.1

Table 1.10

Tonne-kilometres achieved in national and international intra-Community transport by "Hire and Reward" hauliers for each nationality of haulier.  
(x mio t-km)

Nationality of haulier	1981	1982	1983	1984	% change 84/81
D	67301	67027	69001	70147	+ 4.2
F	58186	55909	57725	57554	- 1.1
I	-	-	-	-	-
NL	22415	23683	24054	26280	+ 17.2
B	10014	10852	10952	11859	+ 18.4
L	-	368	-	-	-
UK	61022	59939	62051	66411	+ 8.8
IRL	1789	1764	1781	1887	+ 5.5
DK	7731	7795	8465	9060	+ 17.2
GR	7203	7958	8527	9605	+ 33.3
EUR-10 excl. I and L	235661	234927	242556	252803	+ 7.3

Table 1.11

Importance of international intra-Community transport for each nationality of haulier (hire and reward only):

(  $\frac{\text{International t-km}}{\text{National t-km} + \text{International t-km}}$  as % )

Nationality of haulier	1981	1982	1983	1984	Difference 84/81
D	18.1	20.5	20.6	21.1	+ 3.0
F	21.1	20.1	20.6	22.5	+ 1.4
I	-	-	-	-	-
NL	49.3	53.1	55.6	55.2	+ 5.9
B	54.6	55.4	58.4	58.5	+ 3.9
L	-	87.8	-	-	-
UK	4.0	4.2	5.1	4.8	+ 0.8
IRL	17.9	20.2	25.7	23.9	+ 6.0
DK	37.5	40.0	41.2	39.0	+ 1.5
GR	24.2	29.0	31.9	26.2	+ 2.0
EUR-10 excl. I and L	20.5	22.1	23.0	23.3	+ 2.8
Annual difference	+ 1.6	+ 0.9	+ 0.3		

## 1.6 Trends in Member State shares, 1981-1984

Table 1.12 shows the trends in Member State shares for two of the important criteria examined earlier, international intra-Community "Hire and Reward" (Table 1.3) and National plus International intra-Community (Table 1.8).

Over such a short period the percentage shares change relatively little for either criteria (which is why figures for 1982 and 1983 are not shown). There are however substantial differences between the two criteria

For the first criteria (international intra-Community "Hire and Reward") which is relevant to discussions on the Community Quota, Germany, France, Italy and Netherlands each have around 20 %, Belgium nearly 10 %, United Kingdom and Denmark each 4 to 5 %, Greece 3 % and Luxembourg and Ireland about 0.5 %. (One should however remember that the United Kingdom figures exclude unaccompanied semi-trailers).

For the second criteria (national plus international intra-Community), Italy leads with 25 % (although this figure is subject to some reserve) followed by Germany, France and United Kingdom with around 20 % (note the large increase from first criteria for United Kingdom), then a large gap to Netherlands (6 %) and Belgium (nearly 4 %), Denmark and Greece (2 %), Ireland (nearly 1 %) and Luxembourg (0.1 %). The percentages for this second criteria are, in fact, quite close to the total population shares which are given in the final column of Table 1.12.

Table 1.12 Percentage shares of each nationality of haulier in international intra-Community "Hire and Reward" and national plus international intra-Community (in t-km) and total population.

Nationality of haulier	International Intra-Community Hire and Reward		National plus International Intra-Community		Population
	1981	1984	1981	1984	1984
D	20.1	20.5	21.7	21.4	22.4
F	20.2	17.9	18.5	17.5	20.2
I	19.7	18.1	25.7	26.3	20.9
NL	18.2	20.1	6.0	6.4	5.3
B	9.0	9.6	3.6	3.9	3.6
L	0.6	0.4	0.1	0.1	0.1
UK	4.0	4.4	19.4	19.1	20.7
IRL	0.5	0.6	0.9	0.8	1.3
DK	4.8	4.9	2.1	2.2	1.9
GR	2.9	3.5	2.0	2.3	3.6
EUR-10	100.0	100.0	100.0	100.0	100.0

## CHAPTER 2

### The use of Community Quota authorizations 1981-1984

#### 2.1 Introduction

An examination of the 1984 Community Quota Statistics was presented in Section 2.3 of the 1985 Annual Report which particularly examined the incidence of cross-trading.

This chapter examines further details for 1984 and also the evolution over time of various trends, namely:

- general trends for Community Quotas, 1981-1985
- general development of cross-trading, 1983-1985
- Community Quota shares of "Hire and Reward" by relation 1984
- cross-trading on important relations, 1984-1985.

While the Community Quota Statistics are complete (they are required under Regulation 3164/76 for the allocation of the additional Community Quota), there is one major difficulty with the French data. In submitting figures for the 1985 Community Quota Statistics in August 1986 which had been substantially revised upwards, the French authorities indicated that there were errors in earlier figures. However as no revised figures have to date been received, the original figures up to 1984 have had to be used.



## 2.2 General trends for Community Quotas, 1981-1985

In Table 2.1 are reproduced the t-km carried by each nationality of haulier since 1981. Between 1981 and 1984 the total number of authorizations increased from 3827 to 4038 (5.5 %) whereas the t-km increased by (16.2 %) implying an increase of just over 10 % in the average use of an authorization (up from 1736 to 1912 thousand t-km).

The increase in t-km under the Community Quota (16.2 % from 1981 to 1984) is slightly less than that for all "Hire and Reward" hauliers (19.0 % in Table 1.3) so that over this period there was a slight fall in the percentage of t-km carried under Community Quota; details are given to the right in Table 2.1. There is considerable similarity between the increases for each nationality of haulier in Table 2.1 and the increases given in Table 1.3 (this implies that the share held by the Community Quota during this period did not change very much - see Table 2.2). The main difference is in fact for Greece which had an unusually low utilisation per authorization prior to 1984.

In 1985, the number of authorizations increased from 4038 to 5268 (30.5 %) and there was a corresponding substantial increase in t-km (34.1 %) so that (apparent) average use rose from 1912 to 1965 thousand t-km. However, because of difficulties with the French data (see section 2.1 above) care must be taken in interpreting this increase in average use. If the French data is omitted then the number of authorizations increased by 31.1 % and the t-km increased by 29.1 %, implying a small fall in average use of just over 2 %.

Leaving aside the large (apparent) increase for French hauliers (74.3 %), other large increases in 1985 were recorded for Luxembourg, Irish and Greek hauliers; these latter Member States were the ones to receive the highest proportional increase in number of authorizations in 1985 (61 %, 67 % and 49 % respectively).

**Table 2.1** Tonne-kilometres achieved by each nationality of haulier under Community Quota authorizations.  
(x mio t-km)

Nationality of haulier	1981	1982	1983	1984	1985	% change	
						84/81	85/84
D	1413	1511	1593	1640	2125	+ 16.1	+ 29.6
F	838	823	821	854	1489	+ 2.0	+ 74.3 (a)
I	1102	1036	1127	1165	1491	+ 5.7	+ 28.0
NL	978	1082	1180	1194	1479	+ 22.1	+ 23.8
B	712	810	818	810	1084	+ 13.8	+ 33.9
L	138	152	165	176	294	+ 28.1	+ 66.5
UK	485	506	600	637	770	+ 31.3	+ 21.0
IRL	84	92	104	121	204	+ 44.9	+ 68.0
DK	854	962	1011	1022	1255	+ 19.6	+ 22.8
GR	41	42	52	101	160	+ 146.9	+ 58.6
EUR-10	6644	7015	7471	7720	10350	+ 16.2	+ 34.1

Notes: General. EUR-10 totals and changes have been calculated from the more precise figures provided by Member States.

(a) The French figures for 1984 and 1985 are not comparable (see section 2.1).

Table 2.2 shows the share of the Community Quota in international intra-Community "hire and reward" traffic. While the shares are quite stable (except for Luxembourg and Greece) for the period concerned (1981-1984), there are considerable differences between Member States.

**Table 2.2** Percentage share of Community quota for each nationality of haulier in (bilateral) international intra-EUR-10 "hire and reward" traffic.  
(in t-km)

Nationality of haulier	1981	1982	1983	1984	Difference 84/81
D	11.6	11.0	11.2	11.1	- 0.5
F (a)	6.8	7.3	6.9	6.6	- 0.2
I	9.2	8.6	8.4	8.9	- 0.3
NL	8.8	8.6	8.8	8.2	- 0.6
B	13.0	13.5	12.8	11.7	- 1.3
L	39.1	47.0	51.1 p	54.6 p	+ 15.5 p
UK	20.0	19.9	19.0	20.1	+ 0.1
IRL	26.2	25.7	22.6	26.9	+ 0.7
DK	29.5	30.8	29.0	29.0	- 0.5
GR	2.3	1.8	1.9	4.0	+ 1.7
EUR-10	11.0	10.9	10.8	10.7	- 0.3

Notes: (a) The French figures prior to 1985 are too low (see section 2.1)  
p= provisional

At this point it should be recalled (see introduction to chapter I) that the figures for "Hire and Reward" hauliers from the Statistical Directive do not cover cross-trades. Further, figures on cross-trades under Community Quota have only been fully compiled since the Community Quota Statistics have been computerised (1984), summary cross-trade figures for tonnes (1982 and 1983) and t-km (1983) were also calculated manually (see Table 2.16 of 1985 Annual Report). It is thus not possible to add in cross-trades under Community Quota to the bilateral movements reported under the Statistical Directive for the whole of the period 1981-1984; in Table 2.2 cross-trades have thus been omitted for consistency in examining trends.

Because of the increasing importance of cross-trades, it is, however, necessary to add in the cross-trades under Community Quota to the subsequent analysis. The figures for 1984 corresponding to Table 2.2 with this adjustment have already been published for 1984 in Table 2.15 of the 1985 Annual Report.

### 2.3 General development of cross-trading, 1983-1985

As stated in the previous section, statistics on cross-trades under Community Quotas have only been established since 1983 for t-km, while figures for cross-trades outside the Community Quota must await the extension of the Statistical Directive (see section 1.1).

In the Annual Report (Table 2.16) the development of this (restricted form of) cross-trading was examined during a period in which the number of Community Quota authorizations was stable. As stated at the time, it is of considerable importance to see how cross-trading develops as the number of authorizations increases rapidly toward the establishment of a market without quantitative restrictions by 1992.

Table 2.3 shows the effect of the first substantial expansion of authorizations on cross-trading, that of 1985. In 1985 cross-trades increased by 33.3 % almost as much as the total use of Community authorizations (34.1 %); consequently the share of cross-trades was only marginally lower at 21.1 % than the previous year, (21.3 %). In the absence of information on cross-trades "not under Community Quota", it is not possible to say with certainty whether there has been an increase in total cross-trades or merely a transfer of cross-trades towards Community Quota authorizations; it would seem likely, however, that there has been an increase in total cross-trading in 1985.

**Table 2.3** Tonne-kilometres achieved in cross-trading by each nationality of haulier under Community Quota authorizations.

Nationality	t-km in cross-trades (mio t-km)			Share of cross-trades in total t-km under Community Quota authorizations		
	1983	1984	1985	1983	1984	1985
D	56	63	60	3.5	3.8	2.8
F	137	158	256	16.7	18.5	17.2
I	3	2	3	0.3	0.2	0.2
NL	689	726	886	58.4	60.8	59.9
B	399	439	577	48.7	54.3	53.2
L	99	112	209	59.9	63.4	71.2
UK	61	60	77	10.2	9.4	9.9
IRL	24	31	44	22.8	25.8	21.8
DK	52	51	77	5.1	5.0	6.2
GR	0	0	0	0	0	0
EUR-10	1520	1642	2188	20.3	21.3	21.1

## 2.4 Community Quota share of "Hire and Reward" by relation, 1984

As explained above it is necessary to add the cross-trades under the Community Quota to the bilateral journeys reported under the Statistical Directive in order to assess the share of traffic carried out under Community Quota.

The latest year for which this analysis is possible is 1984 since comprehensive data for 1985 is not yet available from the Directive. In the 1985 Annual Report, analyses were presented according to the nationality of haulier (Tables 2.14 and 2.15) and according to the Member State of loading (Tables 2.17 and 2.18). In this report similar analyses but by relation are presented in Tables 2.4 and 2.5 (Note that the right hand column of percentages in Table 2.5 is the same as Table 2.18 in the 1985 Annual Report except for rounding).

If one examines the 27 "important" relations in Table 2.5 (those with "Hire and Reward" total (entry "E") greater than 1 % of the Intra EUR-10 total) then Table 2.6 A shows them ranked according to Community Quota share (the 27 relations form 13 pairs plus F/UK):

T A B L E 2.6 A

I B	B / I	29 %	I / B	25 %
D I	D / I	20 %	I / D	19 %
I UK	I / UK	18 %	UK / I	18 %
I NL	NL / I	15 %	I / NL	11 %
D DK	DK / D	14 %	D / DK	11 %
D F	D / F	10 %	F / D	10 %
D B	D / B	8 %	B / D	8 %
F NL	F / NL	8 %	NL / F	8 %
F UK	F / UK	6 %		
F I	F / I	4 %	I / F	4 %
D GR	D / GR	4 %	GR / D	3 %
F B	F / B	4 %	B / F	3 %
D NL	D / NL	3 %	NL / D	3 %
NL B	NL / B	0 %	B / NL	0 %

Table 2.4  
Tonne-kilometres achieved by "Hire and Reward" hauliers from (A) Origin Member State (B) Destination Member State and (C) Other Member States (cross-trades) on international intra EUR-10 traffic, 1984 (x mio t-km)

Origin	Destination		I	NL	B	L	UK	IRL	DK	GR	EUR-10
	D	F									
D	A	2277	2421	1076	999	73	175	15	428	96	7560
	B	1763	1771	3422	983	34	311	36	685	646	9651
	C	103	88	38	58	2	24	1	8	5	327
F	A	X	2497	377	1082	68	642	2	99	109	7001
	B	X	2021	947	1253	25	357	43	226	92	7315
	C		59	18	46	3	10	1	24	1	275
I	A	1939	X	411	496	10	1040	44	131	103	6855
	B	2025		879	482	10	633	51	224	75	6961
	C	44		56	87	10	64	1	12	0	479
NL	A	1260	1274	X	1050	40	170	4	248	43	7953
	B	639	933		202	5	124	23	135	249	3094
	C	17	102		0	0	2	0	2	2	148
B	A	1623	643	364	X	66	8	0	49	0	3924
	B	1135	512	1042		70	123	5	120	89	4088
	C	51	148	1		1	2	0	16	1	288
L	A	39	10	16	47	X	0	0	0	0	179
	B	22	11	29	52		3	0	0	3	242
	C	1	2	0	0		0	0	1	0	7
UK	A	361	663	94	108	6	X	20	3	56	1589
	B	267	619	68	2	0		70	134	34	1307
	C	10	36	1	4	0		0	0	1	64
IRL	A	66	24	5	6	0		X	0	2	223
	B	0	27	3	0	0	95		5	1	61
	C	4	2	0	0	0	16		0	0	8
DK	A	224	287	81	62	0	506	28	X	71	1976
	B	40	85	161	38	0	1	0		14	556
	C	12	4	3	6	0	0	0		0	43
GR	A	128	87	170	50	1	56	0	10	X	1313
	B	30	213	14	0	0	11	0	24		354
	C	0	3	0	0	0	0	0	0	X	6
EUR-10	A	7917	7906	2594	3900	264	2692	113	968	480	38573
	B	5921	6192	6565	3012	144	1579	228	1553	1203	33629
	C	242	444	117	201	16	102	3	63	10	1645

TABLE 2.5  
 Tonne-kilometres achieved by "Hire and Reward" hauliers (D) using Community Quota authorizations, (E)  
 irrespective of type of authorization ((A)+(B)+(C) from Table 2.4) and (F) Community Quota use as a  
 percentage of total use ((D)/(E)).  
 ((D) and (E); x mio t-km)

Origin	Destination										GR	EUR-10
	D	F	I	NL	B	L	UK	IRL	DK	GR		
D		405	852	146	155	14	86	6	125	28	1817	
E	X	4143	4280	4536	2040	109	510	52	1121	747	17538	
F		108	208	38	88	138	178	128	118	48	10.48	
F	442		194	112	94	12	63	11	147	26	1101	
E	4589	X	4577	1342	2381	96	1009	46	349	202	14591	
F	108		48	88	48	128	68	248	428	138	7.58	
D	1052	180		142	271	24	309	18	241	6	2243	
E	5468	4008	X	1346	1065	30	1737	96	367	178	14295	
F	198	48		118	258	808	188	198	668	38	15.78	
D	134	149	340		1	0	10	5	41	13	693	
E	4671	1916	2309	X	1252	45	296	27	385	294	11195	
F	38	88	158		08	08	38	198	118	48	6.28	
D	182	94	382	2		2	10	2	41	4	719	
E	2231	2809	1303	1407	X	137	133	5	185	90	8300	
F	88	38	298	08		18	88	408	228	48	8.78	
D	18	12	19	1	1	X	1	0	4	0	56	
E	192	62	23	45	99		3	0	1	3	428	
F	98	198	838	28	18		338	-	-	08	13.18	
D	65	58	233	4	8	0		7	2	5	382	
E	403	638	1318	163	114	6	X	90	137	91	2960	
F	168	98	188	28	78	08		88	18	58	12.98	
D	11	27	9	2	2	0	4	0	0	0	55	
E	36	70	53	8	6	0	111	X	5	3	292	
F	318	398	178	258	338	-	48		08	08	18.88	
D	138	99	298	24	20	0	3	0		2	584	
E	952	276	376	245	106	0	507	28	X	85	2575	
F	148	368	798	108	198	-	18	08		28	22.78	
D	28	11	14	9	2	0	4	0	0		68	
E	876	158	303	184	50	1	67	0	34	X	1673	
F	38	78	58	58	48	08	68	-	08		4.18	
D	2070	1035	2341	442	554	52	490	49	601	84	7718	
E	19418	14080	14542	9276	7113	424	4373	344	2584	1693	73847	
F	10.78	7.48	16.18	4.88	7.88	12.38	11.28	11.48	23.38	5.08	10.58	

The results show the clear use of Community Quota authorizations for relations where the two Member States are not contiguous (the few top ranked pairs all involve I together with D, NL, B and UK) and the very low use in the Benelux area.

If the cut-off point is lowered to 0.3 % of the Intra-EUR-10 total instead of 1 % as above, then the following 13 relations in ranked order are added as shown in Table 2.6 B.

T A B L E 2.6 B

I DK	DK / I	79 %	I / DK	66 %
F DK	F / DK	42 %	DK / F	36 %
D UK	D / UK	17 %	UK / D	16 %
NL DK	NL / DK	11 %	DK / NL	10 %
F UK	UK / F	9 %		
I GR	GR / I	5 %		
NL GR	NL / GR	4 %		
NL UK	NL / UK	3 %		
UK DK	DK / UK	1 %		

In this second list, the extensive use of Community Quota authorizations in relations between DK and I or F can be seen, whereas those relations which are "free from authorizations" (relations between UK and NL or DK) have very low use of Community Quota authorizations.

In summary it can be seen that those relations involving either I or DK generally have very high use of Community Quota. This confirms the well known fact that I, F and D (through which DK hauliers must pass to reach the rest of EUR-10, except UK) had a restrictive policy on bilateral and transit authorizations, encouraging hauliers from other Member States to make intensive use of their Community Quota authorizations to reach I or cross F or D.

It is also interesting to examine the share of Community Quota authorizations in each bilateral relation ignoring cross-trades completely. Such an analysis is carried out in Table 2.7 which shows the percentage share of each bilateral t-km (as reported in the Statistical Directive) which is carried out under Community Quota authorizations. It should be emphasised that bilateral movements recorded in the Community Quota statistics are all movements between the member State of the haulier and another member State; they may (or may not be) part of a journey involving cross-trade stages, this more complex form of analysing the Community Quota Statistics was abandoned in 1976 following the elimination of cross-trading from the utilization criteria.



In Table 2.7 the underlined percentages represent the "most important" relations (those where the total hire and reward t-km exceeds 1 % of the Intra EUR-10 total) and the percentages in brackets represent the "least important" relations (those where the total hire and reward t-km is less than 0.1 % of the Intra EUR-10 total). This convention, which is also extended to the marginal totals, shows that less than 1 % of the intra EUR-10 t-km originates or is destined for Luxembourg or Ireland.

TABLE 2.7 PERCENTAGE SHARE OF BILATERAL "COMMUNITY QUOTA" IN BILATERAL  
"HIRE AND REWARD" (in t-km)

Origin	Hauliers from	Destination										GR	EUR-10
		D	F	I	NL	B	L	UK	IRL	DK	GR		
D	O	6	9	21	5	6	1	7	(0)	4	5	10.5	
	D	X		15	2	4	29	16	14	14	3	7.2	
F	O	9	3	3	6	3	1	3	(0)	30	14	5.4	
	D	6	X	8	2	2	(36)	9	23	42	11	6.1	
I	O	13	4	3	9	16	(40)	5	0	8	0	8.6	
	D	20	3	X	6	21	(100)	31	33	98	8	16.9	
NL	O	2	7	9	13	0	0	1	(0)	4	2	3.5	
	D	6	7	13	X	0	(0)	6	(22)	21	4	8.5	
B	O	4	1	22	18	0	0	(12)	(-)	8	(-)	5.4	
	D	7	2	2	0	X	1	6	(40)	18	3	5.4	
L	O	19	28	(90)	(6)	2	(-)	(-)	(-)	(-)	(-)	19.6	
	D	2	(0)	(73)	(0)	0	X	(0)	(-)	(-)	(0)	5.4	
UK	O	17	11	3	27	2	3	1	(10)	7	1	17.7	
	D	6	3	2	2	(0)	(-)	X	(0)	1	3	2.8	
IRL	O	(36)	33	(33)	(40)	(33)	(-)	3	(-)	(-)	(0)	20.6	
	D	(0)	(-)	(0)	(0)	(-)	(-)	(12)	X	(0)	(0)	4.9	
DK	O	15	35	100	20	21	(-)	(0)	(0)	(-)	1	25.6	
	D	5	20	11	3	3	(-)	(0)	(-)	X	(7)	6.3	
GR	O	2	7	11	0	2	(0)	7	(-)	(-)	(0)	4.0	
	D	8	(7)	(7)	(7)	(-)	(-)	(9)	(-)	(0)	X	2.5	
EUR-10	O	7.1	6.0	16.7	5.4	4.9	2.3	3.4	1.8	7.9	5.4	8.2	
	D	10.9	5.4	9.3	2.9	5.3	21.5	18.6	19.3	29.9	4.1	8.6	

Examination of the "most important" relations shows that the highest use of Community Quota authorizations occurs in the following cases as shown in Table 2.8 (UK I UK means UK hauliers from I to UK).

T A B L E 2.8

UK	I	UK	(31 %)
UK	UK	I	(27 %)
B	B	I	(22 %)
B	I	B	(21 %)
D	D	I	(21 %)
D	I	D	(20 %)
I	B	I	(18 %)
I	I	B	(16 %)
DK	DK	D	(15 %)
DK	D	DK	(14 %)
I	D	I	(15 %)
I	I	D	(13 %)

## 2.5 Cross-trading on important relations, 1984-85

This analysis is restricted to 1984 and 1985 for two reasons. Firstly the summary cross-trade tables for 1983 were not compiled by relation and secondly the small change in total cross-trades between 1983 and 1984 (1520 to 1642 mio t-km, see Table 2.3) in a period when the number of authorizations was fixed is of less interest.

In Table 2.9 the 17 relations with the largest amount of cross-trades (as measured in t-km) are ranked according to the t-km in 1984. Summary figures at the foot of the table gives details for the first 7 (ranked) relations, the next 10 (ranked) relations, the remaining relations (no details of individual relations presented) and the total for all relations.

While there has been some variation between individual relations, Table 2.9 show that the 33 % overall increase in cross-trade t-km has been fairly evenly distributed between the 3 groupes of relations shown in the summary at the foot of the table. Two relations (I/B and D/B) showed increases of about 60 % while two other relations (D/I and B/I) recorded increases of about 50 %; of the 17 relations examined only one relation (F/I, with 3 %) showed less than 17 % increase.

Table 2.9 also shows the percentages held by cross-trades in the total t-km performed under Community Quota authorizations. In 1984, this exceeded 50 % only on the B/F relation (48 % for the F/B relation); and while 5 of the first 7 (ranked) relations had cross-trade shares exceeding 25 %, the average of the first 7 was reduced to 22.6 % (very close to the overall average of 21.3 %) because of the low cross-trade shares for I/D (19 %) and especially D/I (10 %). Evidently this pair of relations (D I) are of little interest to Community cross-traders, although it is attractive to non-Community (mainly Austrian) hauliers (see Tables 2.9 and 2.10 of the 1983 Annual Report). Between 1984 and 1985 there were few large changes in the cross-trade share except B/F (44 % instead of 54 %), F/B (40 % instead of 48 %) F/I (20 % instead of 30 %) and I/F (16 % instead of 24 %). As these relations all fell in the "Next 10" group of relations, this group's average fell from 30.1 % to 26.4 %. Cross-trading on the "Remaining" relations) rose marginally from 12.4 % to 13.4 % but remained well below the average for all relations (around 21 %).

TABLE 2.9

Relations with important cross-trades

	1984			1985			Change 85/84	
	t/km (mio)	Share of C.Q.	Total H&R	t-km (mio)	Share of C.Q.	Total H&R	t/km (mio)	%
I/D	205	19%	3.7%	251	19%	N	+46	+22%
B/I	148	39%	11.4%	221	42%	N	+73	+49%
F/D	113	25%	2.5%	140	22%	N	+27	+24%
D/F	103	25%	2.5%	133	23%	N	+30	+29%
NL/I	102	30%	4.4%	129	28%	N	+27	+26%
D/I	88	10%	2.1%	132	12%	N	+44	+50%
I/B	87	32%	8.2%	140	38%	N	+53	+61%
B/D	68	38%	3.0%	88	36%	N	+20	+29%
I/UK	64	21%	3.7%	85	20%	N	+21	+33%
F/I	59	30%	1.3%	61	20%	N	+ 2	+ 3%
D/B	58	38%	2.8%	92	40%	N	+34	+59%
I/NL	56	39%	4.2%	72	37%	N	+16	+29%
B/F	51	54%	1.8%	60	44%	N	+ 9	+18%
F/B	46	48%	1.9%	54	40%	N	+ 8	+17%
I/F	44	24%	1.1%	54	16%	N	+10	+23%
D/NL	38	26%	0.8%	46	27%	N	+ 8	+21%
UK/I	36	16%	2.7%	48	16%	N	+12	+33%
First 7 relations	846 (51%)	22.6%	3.7%	1146 (52%)	23.0%	N	+300	+35%
Next 10 relations	520 (32%)	30.1%	1.9%	660 (30%)	26.4%	N	+140	+27%
Remaining relations	279 (17%)	12.4%	1.2%	382 (18%)	13.4%	N	+103	+37%
All relations	1645 (100%)	21.3%	2.2%	2188 (100%)	21.1%	2.8% est.	+543	+33%

Table 2.9 also shows the percentages held by cross-trade in the total t-km performed by all Community Hire and Reward hauliers. While the share for all relations has risen from 2.2 % in 1984 to an (estimated) 2.8 % in 1985, no details can be given for individual relations for 1985. For 1984, the high share of cross-trades for B/I (11.4 %) and I/B (8.2 %) are particularly noteworthy; the only other shares to exceed 3 % also concern relations with Italy (NL/I, 4.4 %; I/NL, 4.2 % and I/D, 3.7 %). These results seem to support earlier conclusions that hauliers with Community Quota authorizations use them even in cross-trading with Italy because the situation regarding bilateral authorizations with Italy or transit authorizations via Germany or France was difficult.

A full table of the percentage shares of cross-trades in total "hire and reward" for 1984 is given in Table 2.10 (the system of underlining and putting some percentages in brackets is the same as in Table 2.7, see above).

TABLE 2.10    PERCENTAGE SHARE OF CROSS-TRADES IN TOTAL HIRE AND REWARD (in t-km)

Origin	D	F	I	NL	B	L	UK	IRL	DK	GR	EUR-10
D	X	<u>2.5</u>	<u>2.1</u>	<u>0.8</u>	<u>2.8</u>	1.8	4.7	(1.9)	<u>0.7</u>	<u>0.7</u>	<u>1.9</u>
F	<u>2.5</u>	X	<u>1.3</u>	<u>1.3</u>	<u>1.9</u>	3.1	<u>1.0</u>	(2.2)	6.9	0.5	<u>1.9</u>
I	<u>3.7</u>	<u>1.1</u>	X	<u>4.2</u>	<u>8.2</u>	(33.3)	<u>3.7</u>	1.0	3.3	0	<u>3.3</u>
NL	<u>0.5</u>	<u>0.9</u>	<u>4.4</u>	X	<u>0</u>	(0)	0.7	(0)	0.5	0.7	<u>1.3</u>
B	<u>3.0</u>	<u>1.8</u>	<u>11.4</u>	<u>0.1</u>	X	0.7	1.5	(0)	8.6	1.1	<u>3.5</u>
L	<u>1.6</u>	(1.6)	(8.7)	(0)	0	X	(0)	(-)	(100)	(0)	<u>1.6</u>
UK	<u>3.0</u>	<u>1.6</u>	<u>2.7</u>	<u>0.6</u>	<u>3.5</u>	(0)	X	0	0	1.1	<u>2.2</u>
IRL	(5.6)	(5.7)	(3.8)	(0)	(0)	(-)	0	X	(0)	(0)	<u>2.7</u>
DK	<u>1.9</u>	<u>4.3</u>	<u>1.1</u>	<u>1.2</u>	<u>5.7</u>	(-)	0	(0)	X	0	<u>1.7</u>
GR	<u>0.3</u>	0	<u>1.0</u>	0	(0)	(0)	(0)	(-)	(0)	X	<u>0.4</u>
EUR-10	<u>2.3</u>	<u>1.7</u>	<u>3.1</u>	<u>1.3</u>	<u>2.8</u>	3.8	<u>2.3</u>	0.9	<u>2.4</u>	<u>0.6</u>	<u>2.2</u>

## CHAPTER 3

### Expected economic impact of Community Quota authorizations, 1987

#### 3.1 Introduction

In Chapter 2 it was shown that in 1984 just over 10 % of the tonne-kilometres performed by hire and reward hauliers in international intra-Community (EUR-10) traffic was done under Community Quota authorizations. With the rapid cumulative increase in the number of Community quota authorizations since 1984, 30 % in 1985, 41 % in 1986 (although this, of course, includes Spain and Portugal for the first time) and 27 % already agreed for 1987, it is of considerable interest to examine the development of the expected share of the Community Quota in total hire and reward international intra-Community traffic. Before examining this, however, it is first necessary to consider the inclusions of Spain and Portugal in the matrices, which have up to now in this Report have only referred to EUR-10.



### 3.2 "Hire and Reward" international intra-EUR-12 tonne kilometres, 1984

For intra-EUR-10 traffic, details have already been presented in Table 2.4 of the tonne-kilometres performed in 1984. For the "bilateral movements only" the data can be rearranged as shown in the top left-hand corner of Table 3.1, so that "nationality of haulier" appears as the "row" of the table and the "relation" appears as the "column". The same data can be extracted directly from Tables 1.2.X.2 and 1.2.X.4 of the SOEC publication on the 1984 Road Statistics Directive results except, of course, that Table 3.1 includes estimates for Italy and the Luxembourg figures are those for 1982.

Under the Statistical Directive, Member States are required to furnish tonne-kilometres for intra-Community traffic but not for journeys to third countries. A number of Member States do, however, calculate such tonne-kilometres for their own purposes and kindly supplied such data to the SOEC for 1983 and 1984 where available.

During the negotiations on the 1986 Community Quota authorizations, the Spanish and Portuguese authorities supplied data on the tonne-kilometres of their hauliers to EUR-10 and also between Spain and Portugal (details of tonnages involved have already been presented in the 1985 Annual Report). From this Spanish and Portuguese data, the average distance to each Member State was calculated and applied to the tonnages carried by hauliers from the partner Member State concerned in cases where the partner Member State was not able to provide the tonne-kilometres themselves. In this way it was possible to build up a complete Intra-EUR-12 matrix of tonne-kilometres for 1984.

In the discussions on the Spanish and Portuguese Community Quotas for 1986, it was considered appropriate to make an allowance for the fairly rapid growth of trade that would occur after adhesion to the Community; this adjustment was set at 30 %. In order to assess the impact of the Community Quota in 1987, it seemed reasonable to make the same assumption of a 30 % adjustment for traffic to and from (and between) Spain and Portugal in addition to the "normal" growth of international intra-Community road haulage. The method of calculation adopted was to add the 30 % adjustment to the 1984 matrix, i.e. as if Spain and Portugal were in the Community in 1984; these results are presented in the bottom rows and right-hand columns of Table 3.1.

TABLE 3.1 Bilateral tonne-kilometres by "Hire and Reward" haulier by relation, 1984 (with 30 % increase for traffic to and from Spain and Portugal)

(X mio t-km)

'84	D	F	I	NL	B	L	UK	IR	DK	GR	EUR-10	E	P	EUR-12
D	-	4268	5003	1860	1991	195	288	24	645	158	14792	1877	214	16883
F	3888	-	4522	1016	2217	90	909	2	139	139	12922	1093	406	14421
I	4452	3960	-	1344	1008	21	1659	71	216	316	13047	823	243	14113
NL	7286	2207	2153	-	2092	69	238	7	409	57	14518	358	93	14969
B	2154	2876	1125	566	-	118	10	0	87	0	6936	332	-	7268
L	101	64	20	21	117	-	0	0	0	0	323	0	0	323
UK	589	718	1296	218	231	9	-	36	4	67	3168	177	15	3360
IRL	61	109	75	28	11	0	165	-	0	2	451	25	-	476
DK	1402	450	511	216	182	0	640	33	-	95	3529	133	32	3694
GR	1452	220	162	419	139	4	90	1	24	-	2516	8	1	2525
EUR-10	21390	15232	14867	5688	7988	506	3999	174	1524	834	72202	4826	1004	78032
E	1716	3661	597	860	572	72	884	60	50	7	8479	-	139	8618
P	438	480	224	65	92	5	105	-	14	0	1423	166	-	1589
EUR-12	23544	19373	15688	6613	8652	583	4988	334	1588	841	82104	4992	1143	88239

The figures in Table 3.1 only relate to "bilateral" movements. It is necessary to add the "cross-trades" movements under the Community Quota to obtain the complete situation (see remarks at end of Section 2.2). This point is reexamined in Section 3.5 after the development of number of Community Quota authorizations and the estimated use of such authorizations has been examined.

### 3.3 Number of Community Quota authorizations, 1984 - 1987

As already mentioned in the introduction to this chapter, there has been a dramatic increase in the number of Community Quota authorizations since 1984, this followed a period when the number of authorizations had only risen very slowly (3827 in 1981 to 4038 in 1984).

The breakdown of authorizations between Member States is given in Table 3.2. For 1987, two sets of figures are given, the (provisional) Decision of the Council of 16 December 1986 which relates to the "15 % + compensation" taken under the existing Regulation 3164/76 (which gave an overall increase of 27 %) and the figures included in the Commission Proposal for 1987 which are based on the 40 % increase (+ compensation) agreed in principle by the Council in June 1986; these two options are referred to as 1987 A and 1987 B.

TABLE 3.2

Number of Community Quota Authorizations, 1984 - 1987

Member State	1984	1985	1986	1987	
				A	B
D	727	914	1112	1441	1735
F	656	801	957	1238	1488
I	567	721	883	1178	1424
NL	626	785	955	1291	1553
B	434	570	707	868	1036
L	111	179	245	305	404
UK	436	551	673	760	902
IRL	88	147	204	258	341
DK	305	469	625	739	929
GR	88	131	170	230	293
E			673	829	1014
P			233	309	416
EUR-10/12	4038	5268	7437	9446	11535

### 3.4 Estimated use of Community Quota authorizations, 1986 - 1987

The latest figures relating to the use of Community Quota authorizations relates to 1985. Details of the total tonne-kilometres and cross-trading tonne-kilometres by each of nationality of haulier have been given in Table 2.1 and 2.3 respectively. From these tables one can calculate the average use per authorization as shown in Table 3.3 and 3.4 respectively. Figures for Spain and Portugal are based on the partial 1986 data that were available at the time the Commission carried out its calculations for its Decision on the 1987 Community Quotas (Decision of 30 September 1986).

Examination of the results of Tables 3.3 and 3.4 together with preliminary information from the 1986 Community Quota Statistics suggests that, despite the large increase in the number of Community Quota authorizations, there is no evidence, as yet, of a reduction in the average tonne-kilometre (or cross-trading tonne-kilometre) per authorization, a reduction which must surely come, sooner or later, as the number of authorizations increases at 40 % (cumulative) per annum. (The reduction is expected to come due to the gradual spread of allocation of authorizations to smaller vehicles as the number of authorizations builds up).

It therefore seems reasonable to assume that, in 1986 and 1987, the average use of authorizations (and cross-trade use of authorizations) remains as in 1985. With this assumption, one can calculate the total utilization of Community Quota authorizations in 1986 and 1987 (under both option A and B) as shown in Table 3.5 and the cross-trade utilization for the same alternatives in Table 3.6.

TABLE 3.3

Average tonne-kilometres per Community Quota Authorization  
(000's)

Nationality of haulier	1981	1982	1983	1984	1985	% change 85/81
D	2051	2105	2192	2256	2325	+ 13
F (a)	1336	1268	1252	1302	1859	+ 39
I	2045	1851	1988	2055	2068	+ 1
NL	1639	1748	1884	1908	1883	+ 15
B	1723	1889	1885	1886	1901	+ 10
L	1299	1384	1487	1588	1640	+ 26
UK	1160	1173	1376	1460	1398	+ 21
IRL	1101	1077	1176	1378	1387	+ 26
DK	2987	3205	3314	3350	2676	- 10
GR	536	497	596	1144	1218	+127
E (b)					2269	-
P (b)					1834	-

Notes:

- (a) The French figures prior to 1985 are not comparable with 1985 (see Section 2.1).
- (b) The Spanish and Portuguese figures are based on partial year estimates for 1986.

TABLE 3.4

Average "cross-trade" tonne-kilometres per  
Community Quota Authorization  
(000's)

Nationality of haulier	1983	1984	1985	% change 85/83
D	77	87	65	- 16
F (a)	210	242	319	+ 52
I	6	4	4	- 33
NL	1101	1160	1128	+ 2
B	919	1012	1012	+ 10
L	891	1007	1168	+ 31
UK	141	137	139	- 1
IRL	269	355	303	+ 13
DK	169	168	165	- 2
GR	0	0	0	-
E (b)			40	-
P (b)			17	-

Notes:

- (a) See Note (a) of Table 3.3
- (b) See Note (b) of Table 3.3

TABLE 3.5

Total use of Community Quota Authorizations, 1984 - 1987  
(x mio t-km)

Member State	1984 (actual)	1985 (actual)	1986 (estimate)	1987 (estimate)	
				A	B
D	1640	2125	2585	3350	4034
F (a)	854	1489	1779	2301	2766
I	1165	1491	1826	2436	2945
NL	1194	1479	1798	2431	2924
B	810	1084	1344	1650	1969
L	176	294	402	500	663
UK	637	770	941	1062	1261
IRL	121	204	283	358	473
DK	1022	1255	1673	1978	2486
GR	101	160	207	280	357
E			1527	1881	2301
P			427	567	763
EUR-10/12	7720	10350	14792	18794	22942

Notes:

(a) The French figure prior to 1985 is not comparable with 1985 or later (see Section 2.1).

TABLE 3.6

Cross-trade of Community quota Authorizations, 1984 - 1987  
(x mio t-km)

Member State	1984 (actual)	1985 (actual)	1986 (estimate)	1987 (estimate)	
				A	B
D	63	60	72	94	113
F (a)	158	256	305	395	475
I	2	3	4	5	6
NL	726	886	1077	1456	1752
B	439	577	715	878	1048
L	112	209	286	356	472
UK	60	77	94	106	125
IRL	31	44	62	78	103
DK	51	77	103	122	153
GR	0	0	0	0	0
E (b)	27	27	27	33	41
P (b)	4	4	4	5	7
EUR-10/12	1673	2219	2749	3528	4295

Notes:

(a) See Note (a) of Table 3.5.

(b) The Spanish and Portuguese figures for 1984 and 1985 are assumed to be the same as those for 1986 which are based on real figures for part of 1986.



### 3.5 Estimated "Hire and Reward" international intra-EUR-12 tonne-kilometres, 1987

Table 3.1 gives the estimated bilateral t-km in 1984 by nationality of haulier on the assumption that Spain and Portugal were already in the Community (i.e. including the 30 % adhesion effect). Table 3.6 gives the "cross-trades" under the Community Quota for 1984 (and later years). Combining Tables 3.1 and 3.6 gives the total t-km in 1984 for "hire and reward" hauliers on international intra-EUR-12 traffic by nationality of haulier (ignoring as always in this Report cross-trades not carried out under Community Quota). The calculations are set out in Table 3.7.

Table 1.3 showed that the overall increase of all "Hire and Reward" hauliers from 1981 to 1984 was 19 % (slightly more than for all hauliers, 18.3 % (Table 1.1)). This average annual increase of about 6 % was obtained in a period of moderate growth of gross national product and is expected to be roughly maintained from 1984 to 1987 (overall growth rate in 1985 provisionally estimated as 4.9 %, in tonnes - Annual Report 1985 and 4.0 %, 7.6 % and 5.0 % in the first three quarters of 1986 - Quarterly Report No. 23). For the purpose of this Report it will be assumed that total tonne-kilometres increase by 6 % per annum from 1984 to 1987. (Note that small errors in this assumption are not very critical for the purposes needed here, i.e. a total from which to calculate the Community Quota share).

The question then arises as to how to apply this 6 % overall growth rate to each Member State. Application of 6 % growth to the final column of Table 3.7 seems too simplistic since it ignores

- ( i ) different "intrinsic" growth rates for each Member State
- (ii) differential use of Community Quotas for cross-trading by different Member States.

Regarding (i) Table 1.3 shows the different "intrinsic" growth rates for the period 1981 - 1984 which is rather too short a period for a refined analysis. Table 1.3 shows relatively little variation for most Member states between 21 % and 31 % except for France (5 %) and Italy (9 %) and Ireland and Greece (41 - 45 %). The very low figure for France can expect to obtain a relative boost from the adhesion of Portugal and, especially, Spain; the figure for Italy is estimated, while 1981 to 1984 covers a "post-adhesion to the Community" period for Greece. It was therefore concluded that it was not yet possible to calculate different "intrinsic" growth rates for each Member State.

TABLE 3.7

Total tonne-kilometres by Hire and Reward hauliers  
in 1984 assuming Spain and Portugal were already  
in the Community  
(x mio t-km)

Nationality of haulier	Bilateral traffic	Cross-trades	Total
D	16883	63	16946
F	14421	158	14579
I	14113	2	14115
NL	14969	726	15695
B	7268	439	7707
L	323	112	435
UK	3360	60	3420
IRL	476	31	507
DK	3694	51	3745
GR	2525	0	2525
E	8618	27	8645
P	1589	4	1593
EUR-12	88239	1673	89912

Regarding (ii), the evidence so far (based on the large increase in Community Quota authorizations in 1985) is that the average "cross-trading" tonne-kilometres per authorization has remained unchanged. With this assumption the total "cross-trading" tonne-kilometres were estimated in Table 3.6.

The method of calculation finally adopted was to add 6 % per annum to the total tonne-kilometres (88.912 mio t-km - see Table 3.7), to subtract the "cross-trading" tonne-kilometres under each of the alternatives examined (1986, 1987 A, 1987 B) and to assume that each Member State had an equal (slightly below 6 %) growth of "bilateral" tonne-kilometres. Finally the cross-trading tonne-kilometres was added back to the bilateral tonne-kilometres for each Member State to give estimated total tonne-kilometres for each of the alternatives examined. (A similar calculation could have been carried out for 1985, but since the main interest was to compare the (known) situation in 1984 with 1986 and the two alternatives 1987 A and 1987 B, this calculation was not carried out.)

The calculations for the above projection (projection seems more appropriate than forecast in view of the large number of assumptions having to be made) are set out in Table 3.8 for the "bilateral" tonne-kilometres and (combining with the cross-trade tonne-kilometres in Table 3.6) in Table 3.9 for the total tonne-kilometres.

**TABLE 3.8**

**Estimated bilateral tonne-kilometres by  
Hire and Reward hauliers in 1984, 1986 and 1987**

(x mio t-km)

	1984 (a)	1986	1987	
			A	B
Total	89912	101025	107087	107087
Cross-trade	- 1673	- 2749	- 3528	- 4295
Bilateral	88239	98276	103559	102792
of which hauliers from				
D	16883	18803	19814	19668
F	14421	16061	16925	16799
I	14113	15718	16563	16441
NL	14969	16672	17568	17438
B	7268	8095	8530	8467
L	323	360	379	376
UK	3360	3742	3943	3914
IRL	476	530	559	555
DK	3694	4114	4335	4303
GR	2525	2812	2963	2941
E	8618	9598	10114	10039
P	1589	1770	1865	1851
Check Total	88239	98275	103558	102792

**Notes:**

(a) including 30 % additional for traffic to and from Spain and Portugal (adhesion effect).

TABLE 3.9

Estimated total tonne-kilometres by  
Hire and Reward hauliers in 1984, 1986 and 1987

(x mio t-km)

Nationality of haulier	1984 (a)	1986	1987	
			A	B
D	16946	18875	19908	19792
F	14579	16366	17320	17284
I	14115	15722	16568	16456
NL	15695	17749	19024	19200
B	7707	8810	9408	9460
L	435	646	735	848
UK	3420	3836	4049	4041
IRL	507	592	637	658
DK	3745	4217	4457	4459
GR	2525	2812	2963	2943
E	8645	9625	10147	10086
P	1593	1774	1870	1859
EUR-12	89912	101024	107086	107086

Notes:

(a) See Note (a) of Table 3.8

### 3.6 Share of Community Quota in "Hire and Reward" international intra EUR-12, 1987

Dividing the results from Table 3.5 on the (total) use of the Community Quota authorizations by those from Table 3.9 on the (total) tonne-kilometres by "Hire and Reward" hauliers, the percentage share of the Community Quota can be calculated; the results are set out in Table 3.10, the results for 1984 correspond to the actual figures for EUR-10.

The results show that the disparities observed between Member States in 1984 (see Section 2.3.3, Table 2.15 of the 1985 Annual Report) have been maintained in 1986 and only marginally reduced in 1987 after the application of the "compensation".

TABLE 3.10

Percentage Share of Community Quota in total traffic by "Hire and Reward" hauliers in 1984, 1986 and 1987

(in t-km)

Nationality of haulier	1984 (actual)	1986 (estimate)	1987 (estimate)	
			A	B
D	11.0	14	17	20
F (a)	6.5	11	13	16
I	8.9	12	15	18
NL	7.8	10	13	15
B	11.0	15	18	21
L	40.5	62	68	78
UK	19.7	25	26	31
IRL	25.1	48	56	72
DK	28.5	40	44	56
GR	4.0	7	9	12
EUR-10	10.5			
E		16	19	23
P		24	30	41
EUR-12		14.6	17.6	21.4

Notes:

(a) The French figure for 1984 is not comparable with 1986 or later (see Section 2.1).



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