Statistics in focus

INDUSTRY, TRADE AND SERVICES

THEME 4 – 4/2000

SECTORIAL PROFILES

Transport Business Statistics

Road haulage: Italy and Spain with the highest rates of self-employment

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Main features of European Union road haulage:

- The total number of employees, excluding Greece, was 1.3 million in the road haulage sector. The average number of persons employed per enterprise was 3.3.
- Belgium and Luxembourg have the highest turnover per person employed. Road haulage dominated the transport sector.
- The average gross operating rate is up to 16% but there is a high disparity between Member States.
- The road transport share of total final energy consumption was 50% in 1996. Road transport energy consumption in the EU increased 38% from 1985 to 1996.

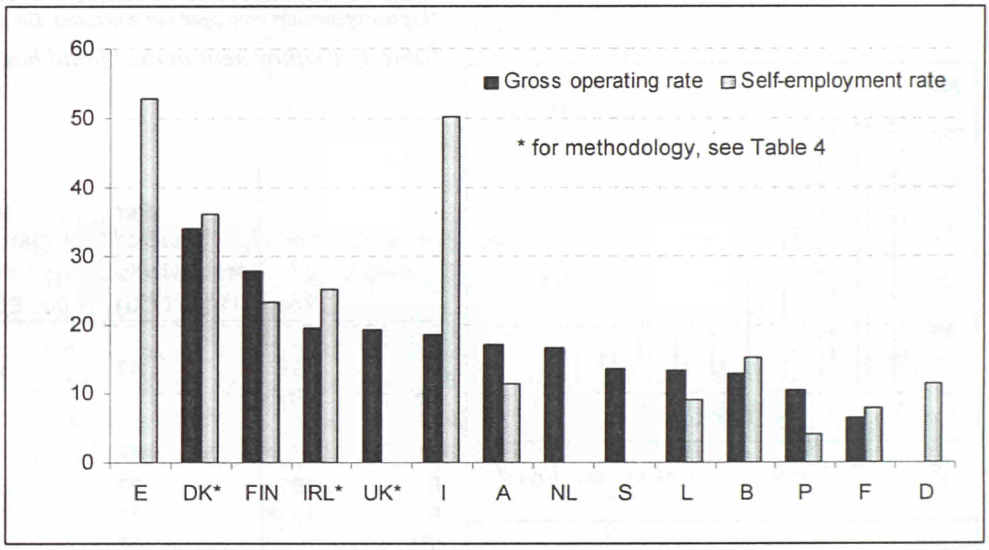

Figure 1: Gross operating rate is shown together with the self-employment rate

Other relevant information highlighted:

- Denmark and Germany presented the highest rate of women's participation (17%).
- Greece and Portugal were the Member States with the highest share of workers aged 55 and above (19% and 18%, respectively).
- Own account represents 23% of the road haulage. Only 2% of own account carriage was imported.

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eurostat

Manuscript completed on: 06.03.2000
ISSN 1561-4840
Catalogue number: CA-NP-00-004-EN-C
Price in Luxembourg per single copy (excl. VAT): EUR 6

The total number of road haulage employees in the EU was 1.3 million

The total number of road haulage employees in the EU, excluding Greece, was 1.3 million, 56% of these work in France, Germany or United Kingdom.

The average number of persons employed per enterprise in the EU (calculated from available data) was 3.3.

The Netherlands had the most persons employed per enterprise with 12 in 1993. Spain, which had 1.8 persons employed per enterprise in 1993, showed at the same time the highest share of self-employed persons (53%). The same trend could be noted with Italy, where every second worker was self-employed in 1996 and the number of persons employed per enterprise was lower than the EU average.

	Year	Number of persons employed	Number of employees	Number of enterprises	Share of employees in persons employed (%)	Number of persons employed per enterprise
EU 15	:	:	:	:	:	:
B	1997	53 660	45 490	:	84.8	:
DK	1993	35 363	22 594	9 772	63.9	3.6
D	1997	274 826	243 628	33 890	88.6	8.1
EL	:	:	:	:	:	:
E	1993	240 871	113 510	136 429	47.1	1.8
F	1996	278 728	256 562	45 688	92.0	6.1
IRL	1997	9 541	7 132	2 330	74.8	4.1
I	1996	275 860	137 350	116 016	49.8	2.4
L	1996	3 856	3 505	401	90.9	9.6
NL	1993	106 255	87 709	8 042	:	12.0
A	1997	43 033	38 104	4 666	88.5	9.2
P	1997	43 519	41 718	5 899	95.9	7.4
FIN	1997	33 693	23 083	11 666	76.8	2.9
S	1996	:	47 640	16 624	:	:
UK	1997	:	250 947	38 442	:	:
IS	:	:	:	:	:	:
NO	:	:	:	:	:	:

Number of employees: NL 1995, FIN 1996
Number of enterprises: E 1997, NL 1995
Share of employees in persons employed: FIN 1996
Number of persons employed per enterprise: DK 1995

Table 1: Employment in the "Road haulage" sector

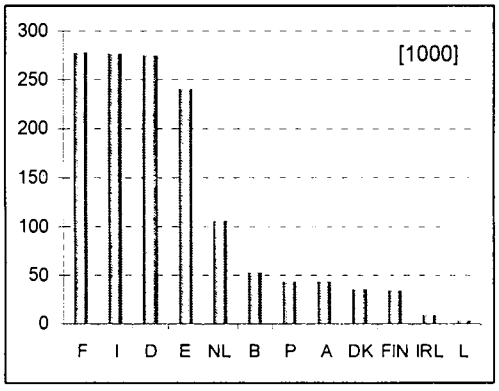

Figure 2: Number of persons employed

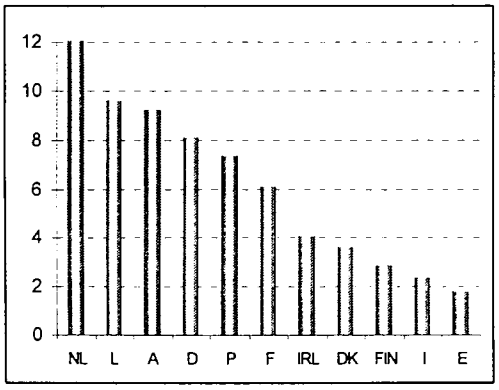

Figure 3: Number of persons employed per enterprise

	Year	Per capita productivity (1000 ECU)	Unit labour cost (1 000 ECU)	Gross value added per employee (1 000 ECU)	Wage adjusted labour productivity (%)	Share of personnel costs in production (%)
EU 15	:	:	:	:	:	:
B	1997	42	32.4	50	130	24.8
DK	1995	:	:	:	:	:
D	:	:	:	:	:	:
EL	:	:	:	:	:	:
E	1993	27	21.9	58	125	:
F	1996	31	27.2	33	113	29.5
IRL	:	28	:	38	:	:
I	1996	31	28.2	63	111	15.1
L	1996	41	28.0	45	146	30.8
NL	1995	:	32.4	47	:	37.2
A	1997	40	28.6	45	140	34.5
P	1997	20	13.0	21	154	17.4
FIN	1996	45	27.0	56	160	26.6
S	1996	:	31.4	49	:	:
UK	1997	:	29.5	:	:	:
IS	:	:	:	:	:	:
NO	:	:	:	:	:	:

Per capita productivity: FIN 1997
Share of personnel costs in production: B 1996, NL 1997, FIN 1997

Table 2: Labour productivity in the "Road haulage" sector

Finland had with 45 000 ECU the highest per capita productivity, closely followed by Belgium (42 000 ECU), Luxembourg (41 000 ECU) and Austria (40 000 ECU). The average in the EU, taking into account available data, was 32 500 ECU. This could be compared with Italy at 31 000 ECU and Spain (27 000 ECU).

Italy and Spain had the highest gross value added per employee (63 000 and 58 000 ECU per employee respectively). This might not give a consistent view of the productivity, since the self-employment in these two countries was significantly higher than in the other Member States.

Portugal had the lowest per capita productivity (20 000 ECU) as well as the lowest unit labour cost (13 000 ECU). This correlation (the higher per capita productivity - the higher unit labour cost) could be observed in the other Member States. For example Belgium had 42 000 ECU per capita productivity and a unit labour cost of 32 400 ECU, both values were more than twice the values of Portugal.

A different view on the productivity is given by wage adjusted labour productivity, see Table 2. Finland together with Portugal had the highest figures with 160% and 154% respectively.

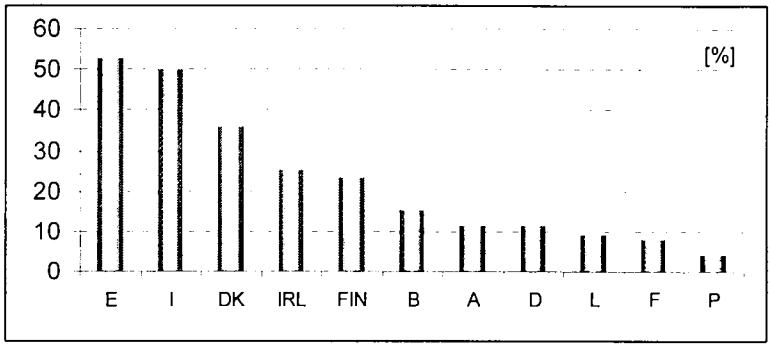

Figure 4: Self-employment rate

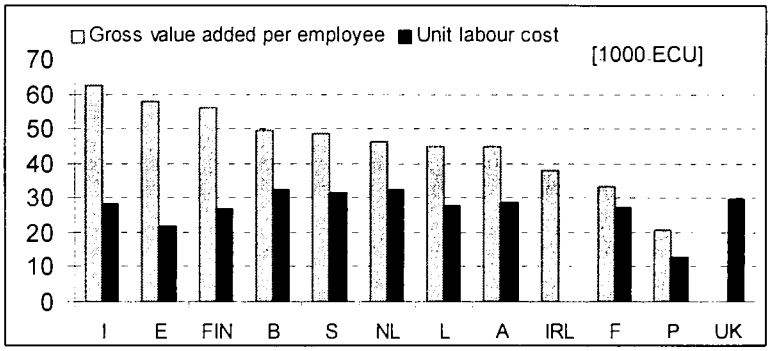

Figure 5: Gross value added per employee and Unit labour cost

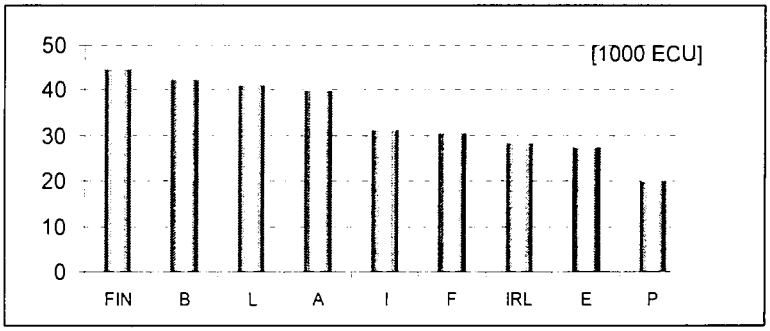

Figure 6: Per capita productivity

Belgium and Luxembourg with the highest turnover per person employed
Road haulage dominated the transport sector

The turnover of the road haulage sector exceeded 130 000 Mio ECU in the EU (excluding Spain and Greece). In comparison, the activity in this sector was almost equivalent to the activity of all other transport modes: the total turnover of railways, sea and air transport industries including passenger was 135 000 Mio ECU in 1995. This also shows the predominance of the road haulage in the transport sector.

The turnover was concentrated to four leading players (Germany, France, Italy and the United Kingdom) that made about 99 000 Mio ECU. The United Kingdom had the largest one with 27 400 Mio ECU.

In view of a lack of information as regards value added for some Member States, the ratio "turnover per person employed" provides an idea of the performance of this sector.

The average of this ratio for available Member States was 87 thousand ECU, which was lower than all other modes, except road passenger transport and railways (37 and 42 thousand ECU per person employed).

European comparison showed good performance of Luxembourg (117 thousand ECU) and Belgium (115 thousand ECU) in the road haulage sector (Table 4).

	Year	Turnover (mio ECU)	Turnover per person employed (1000 ECU)
EU 15	:	:	:
B	1997	6 149	115
DK	1993	2 856	81
D	1997	21 914	80
EL	:	:	:
E	:	:	:
F	1996	24 160	87
IRL	1997	748	78
I	1996	25 514	92
L	1996	451	117
NL	1997	8 057	:
A	1997	3 668	85
P	1997	3 129	72
FIN	1997	2 742	81
S	1996	6 128	:
UK	1997	27 397	:
IS	:	:	:
NO	:	:	:

Table 3: Turnover in the "Road haulage" sector

Road haulage profitability shows high disparity between Member States

	Year	Value added (VA) at factor cost (mio ECU)	Personnel costs (mio ECU)	Gross operating surplus (mio ECU)	Gross operating rate (%)	VA at factor cost in production value (%)
EU 15	:	:	:	:	:	:
B (4)	1997	2 265	1 475	790	13	37
DK (1) (3) (4)	1993	1 691	721	970	34	59
D	:	:	:	:	:	:
EL	:	:	:	:	:	:
E	1993	6 600	2 487	4 112	:	:
F	1996	8 539	6 974	1 565	6	36
IRL (2) (3)	1997	272	125	147	20	38
I	1996	8 624	3 873	4 750	19	34
L	1996	158	98	60	13	50
NL	1997	4 318	2 967	1 350	17	54
A	1997	1 718	1 088	630	17	54
P	1997	870	542	327	10	28
FIN	1997	1 504	737	767	28	54
S (4)	1996	2 322	1 494	828	14	38
UK (1) (3) (4)	1997	12 658	7 393	5 265	19	46
IS	:	:	:	:	:	:
NO	:	:	:	:	:	:

(1) Value added at factor cost and VA at factor cost in production value: figures for DK and UK are based on "value added at basic prices"

(2) Personnel costs: figures for IRL are "wages and salaries"

(3) Gross operating surplus and Gross operating rate: figures for DK, IRL and UK are based on these above meantioned "replacing" figures

(4) VA at factor cost in production value: B 1996; Turnover was used instead of production value for DK, S and UK

Table 4: Value added at factor cost and profitability for the "Road haulage" sector

Wealth created by the road haulage sector is measured by the value added at factor cost. In absolute value, the highest wealth created occured in the United Kingdom (12 700 Mio ECU), but in relative measures (value added at factor cost in production value, the "value added rate"), the leaders were Denmark, the Netherlands, Austria and Finland (see table 4).

In a second step, profitability can be assessed using the gross operating rate as a basic operating ratio (Figure 7, see page 7 for explanations of indicators). The graph clearly shows three groups of Member States: Denmark and Finland achieved a gross operating rate higher than 20%. Profitability of road haulage in Ireland, the United Kingdom, Italy, Austria and the Netherlands were between 17 and 20%. The third group is composed of Member States — for which data are available — whose gross operating rate was below average (16%).

To achieve such results, Denmark, Finland, Austria, the United Kingdom and the Netherlands had high value added rate, while Italy had the lowest share of personnel costs in production (see table 3 page 2).

There was a significant disparity in gross operating rate between Member States: this ratio was more than 30% for Denmark and less than 10% for France.

The low figure for France was more the result of a low value added rate than high personnel costs. The value added rate was lower only in Italy and Portugal but these countries offset by low personnel costs (respectively, 15 and 17%).

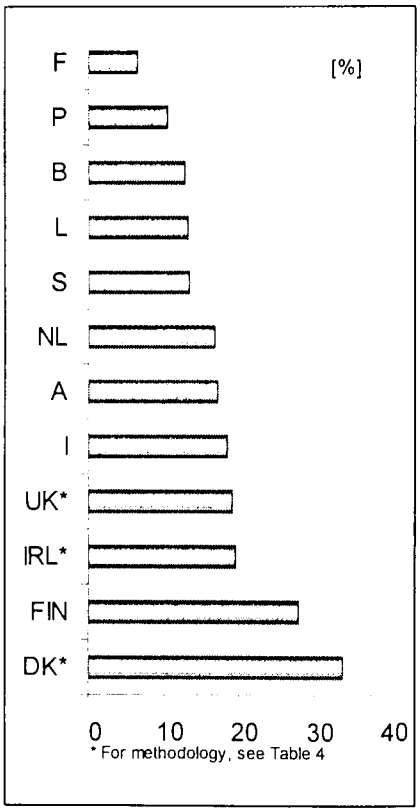

Figure 7: Gross operating rate

In 1998, 87% of all land transport workers were men

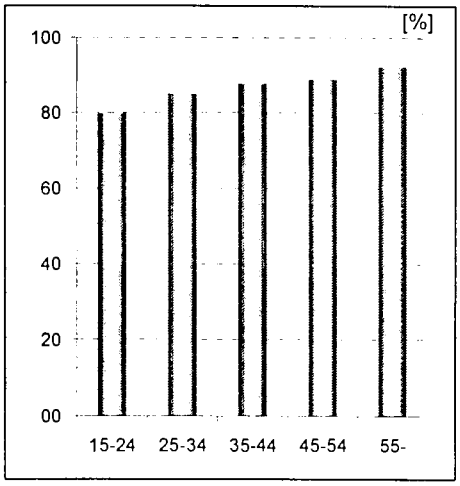

Figure 8: Rate of men, by age in 1998

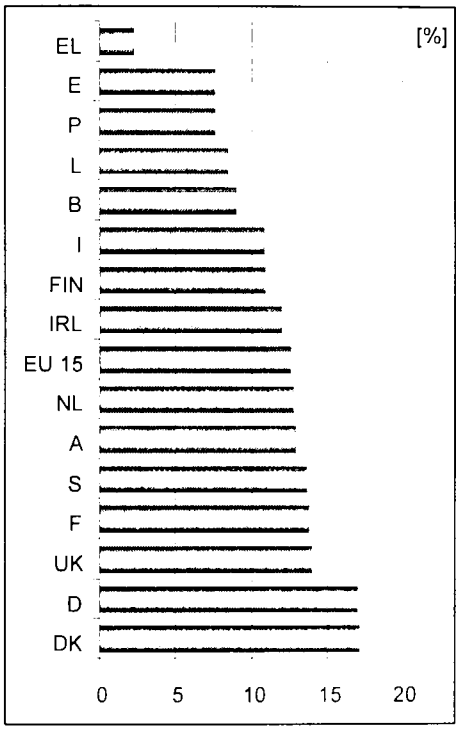

Figure 9: Rate of women in 1998

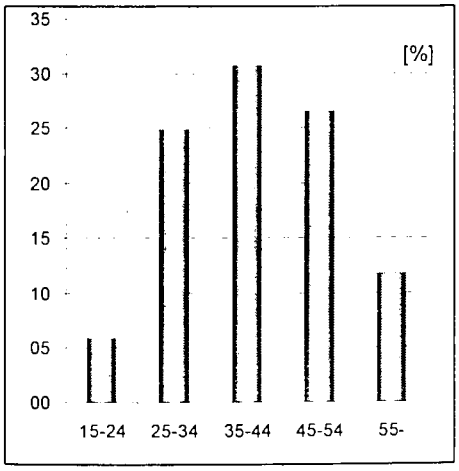

Figure 10: Distribution by age of employees in 1998

[%]	All ages	15-24	25-34	35-44	45-54	55-
EU 15	87	80	85	88	89	92
B	91	:	87	93	94	:
DK	83	:	88	79	74	:
D	83	73	83	83	83	88
EL	98	96	97	97	:	98
E	92	88	88	92	95	:
F	86	:	82	86	90	:
IRL	88	:	85	91	92	91
I	89	80	83	91	92	:
L	92	:	89	96	87	:
NL	87	87	84	89	86	:
A	87	82	88	88	85	:
P	92	76	89	95	96	:
FIN	89	:	94	86	88	:
S	86	:	85	94	86	:
UK	86	68	86	85	88	91

Table 5: Rate of men by age in the "Land transport" sector in 1998

[%]	All ages	15-24	25-34	35-44	45-54	55-
EU 15	100	6	25	31	27	12
B	100	5	25	41	25	4
DK	100	7	26	31	27	9
D	100	6	22	32	26	15
EL	100	5	22	25	29	19
E	100	7	25	32	22	15
F	100	7	26	34	29	5
IRL	100	7	25	28	24	15
I	100	4	25	31	30	10
L	100	:	29	39	20	:
NL	100	8	27	31	24	9
A	100	7	31	32	23	8
P	100	7	25	23	27	18
FIN	100	:	21	31	32	:
S	100	6	27	27	25	16
UK	100	6	26	26	27	16

Table 6: Land transport workers by age in 1998

In 1998, 87% of land transport workers were men. The trend by age groups indicates that the number of men in this sector increases with age, with only 80% of workers aged between 15 to 24 years being men.

Denmark and Germany presented the highest rate of women's participation (17%). In Greece, only 2% of the land transport workers were women. Spain and Portugal also recorded low rates (8%) in this sector.

In the EU, 6% of the workforce in land transport was between 15 and 24 years old. The Netherlands showed the largest share of young people in this branch (8%) and Italy the lowest with 4%.

In 1998, the average land transport worker was 41 years old in the EU. The highest average age was found in Greece (43) and the lowest in Luxembourg (38). 31% of the workers belonged to the age group 35 to 44 years. A quarter of the workforce in this sector was aged between 25 to 34 years.

Greece and Portugal were the Member States with the highest share of workers aged 55 and above (19% and 18%, respectively).

Hire and reward carriage and national transport dominated the road haulage sector

In 1997, for the EU as a whole, excluding Ireland, Luxembourg and Sweden, 1 tera (10^{12}) ton kilometres of goods were carried by road haulage. National transport accounted for 78% of the total (12% exported and 9% imported).

Hire and reward (H&R) carriage dominated road haulage with 77% of total. 75% of H&R is national transport (14% exported and 11% imported). Own account represented 23% of the ton kilometres. 85% is national transport. Only 2% of own account carriage was imported.

	Total			*Hire or reward*			*Own account*		
	National transport	Loaded from the world	Loaded to the world	National transport	Loaded from the world	Loaded to the world	National transport	Loaded from the world	Loaded to the world
EU 15	:	:	:	:	:	:	:	:	:
EUR-11	:	:	:	:	:	:	:	:	:
B	18 426	9 031	12 889	12 371	8 061	11 292	6 055	971	1 596
DK	9 712	5 263	5 963	7 507	5 223	5 866	2 205	40	95
D	203 119	13 276	15 772	133 284	13 276	15 772	69 835	:	:
EL	16 394	289	1 445	3 188	289	1 445	13 206	:	:
E	80 634	12 198	16 153	69 752	12 077	15 891	10 882	120	261
F	138 960	17 646	35 538	103 457	16 694	18 846	35 503	952	16 694
IRL	:	:	:	:	:	:	:	:	:
I	153 600	9 842	9 912	128 338	9 530	9 488	25 262	314	424
L	:	:	:	:	:	:	:	:	:
NL	27 384	15 587	20 412	21 869	15 083	19 492	5 515	503	921
A	11 559	1 774	1 843	6 653	1 507	1 519	4 906	270	322
P	14 443	5 313	4 733	6 339	5 083	4 544	8 104	231	189
FIN	23 508	978	1 144	21 601	978	1 144	1 907	:	:
S	32 176	:	:	29 466	:	:	2 710	:	:
UK	152 502	8 116	8 136	114 173	7 835	7 783	38 329	279	355

Table 7: Road haulage of goods by type of carriage in 1997 [Million Tkm]

Road haulage was responsible of half of the total final energy consumption in 1996

Road transport energy consumption in the EU increased 38% from 1985 to 1996 to 234 million tonnes of oil equivalent (toe). At national level, Luxembourg and Portugal recorded the highest increases (123% and 112% respectively). The main consumers of energy were Germany (53.8 Mio toe or 23% of EU), followed by France and the United Kingdom.

At EU level, the total final energy consumption (TFEC) increased less, by only 17%. The road transport share of TFEC was 50% in 1996 (42% in 1985).

In 1997, CO_2 emissions from road transport reached 706 million tonnes (23% of total CO_2 emissions) in the EU. This amount was an increase by 41% compared to 1985. Biggest emitters were Germany (162 Mio t), France (119 Mio t) and the United Kingdom (114 Mio t).

EU road transport emitted 4 584 million tonnes (36% of total) of NO_x. Biggest emitters were Italy (1 115 Mio t) and France (894 Mio t).

	Road transport (%)				Total transport (%)				Total final energy consumption (%)			
	1997	1985 - 96	1996	1985	1997	1985 - 96	1996	1985	1997	1985 - 96	1996	1985
EU 15	:	38	234.2	170.2	:	39	315.0	227.0	:	17	468.3	401.5
EUR-11	:	39	181.4	130.3	:	39	240.0	172.7	:	16	366.0	315.3
B	7.3	41	7.2	5.1	14.1	59	13.3	8.3	22.4	41	21.7	15.4
DK	3.7	28	3.6	2.8	6.2	54	6.2	4.0	8.9	- 7	9.2	9.9
D	:	32	53.8	40.9	:	25	63.2	50.4	:	10	108.7	98.9
EL	4.9	57	4.8	3.1	9.8	67	9.7	5.8	15.2	58	14.8	9.4
E	21.9	84	21.7	11.8	33.4	84	32.0	17.4	47.0	47	45.3	30.7
F	:	32	38.9	29.4	:	35	47.6	35.2	:	9	74.3	68.2
IRL	2.4	51	2.2	1.4	3.1	66	2.9	1.7	5.5	56	5.1	3.3
I	:	37	33.8	24.8	:	29	39.4	30.5	:	0	56.2	56.0
L	:	123	1.1	0.5	:	126	1.3	0.6	:	78	1.8	1.0
NL	9.7	28	9.5	7.5	25.4	40	24.4	17.4	27.9	30	26.9	20.7
A	:	34	5.4	4.0	:	39	6.0	4.3	:	19	8.9	7 4
P	4.5	112	4.4	2.1	5.7	80	5.6	3.1	9.7	57	9.2	5.9
FIN	:	18	3.4	2.9	:	16	4.4	3.8	:	- 1	7.7	7.8
S	:	19	6.4	5.4	:	25	8.5	6.8	:	1	13.8	13.7
UK	38.5	33	38.1	28.6	51.7	35	50.7	37.7	64.3	21	64.6	53.3

Table 8: Final energy consumption of petroleum products [Million tonnes of oil equivalent, Mio toe]

	CO_2		NOx		NMVOC	
	(Mio t)	(% of total)	(Mio t)	(% of total)	(Mio t)	(% of total)
EU 15	706	23.1	4 584	36.4	5 307	47.2
EUR-11	549	23.5	3 515	37.2	4 018	48.8
B	22	18.8	146	48.5	177	53.1
DK	11	16.9	58	39.0	76	30.8
D	162	19.5	479	26.5	846	46.9
EL	14	17.4	257	58.2	129	35.0
E	65	27.0	446	38.4	522	42.0
F	119	33.0	894	36.5	896	52.8
IRL	7	19.4	66	63.0	50	40.0
I	102	25.3	1 115	47.1	917	51.9
L	4	42.4	8	46.0	9	46.0
NL	28	16.8	126	37.8	199	44.8
A	16	27.0	54	14.0	84	48.8
P	13	28.1	133	38.7	194	52.0
FIN	11	18.2	47	25.8	123	47.3
S	19	36.6	119	28.5	118	35.0
UK	114	21.4	634	30.0	966	46.9

Table 9: Road transport emissions in 1997

➢ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

60.24 Road haulage or Freight transport by road
This is a sector in the NACE Rev. 1 – the statistical classification of economic activities. It is at 4-digit level. This class includes: freight transport operation by road, logging, stock, refrigerated, heavy & bulk haulage, including haulage in tanker trucks, of automobiles, furniture removal, renting of trucks with driver, freight transport by man or animal-drawn vehicles.

11 11 0 Number of enterprises
A count of the non-dormant number of enterprises registered to the population concerned in the business statistics register. This variable refers to all enterprises producing either a market or non-market output.

12 11 0 Turnover
Turnover comprises the totals invoiced by the observation unit during the reference period. This corresponds to market sales of goods or services supplied to third parties.

12 12 0 Production value
The production value is defined as turnover, +/- the changes in stocks of finished products, work in progress and goods and services purchased for resale, - the purchases of goods and services for resale, + capitalised production and other operating income (excluding subsidies).

12 14 0 Value added at basic prices
Value added at basic prices is calculated from the production value plus subsidies on products less the purchases of goods and services plus or minus the changes in stocks of raw materials and consumables. Value added at basic prices is calculated as follows: Turnover - Purchases of goods and services +/- Change in stocks of goods and services + Capitalised production + Operating subsidies linked to products.

12 15 0 Value added at factor cost
Value added at factor cost is calculated by adjusting value added at basic prices for operating subsidies linked to production and duties and taxes linked to production. Value added at factor cost is calculated as follows: Value added at basic prices + Operating subsidies linked to production - Duties and taxes linked to production.

12 17 0 Gross operating surplus
Gross operating surplus is the surplus generated by operating activities after the labour factor input has been recompensed. It can be calculated from the value added at factor cost less the personnel costs. It is the balance available to the unit which allows it to recompense the providers of own funds and debt, to pay taxes and eventually to finance all or a part of its investment.

13 31 0 Personnel costs
Personnel costs are defined as the total remuneration, in cash or in kind, payable by an employer to an employee in return for work done by the latter during the reference period. Personnel costs also include taxes and employees' social security contributions retained by the unit as well as the employer's compulsory and voluntary social contributions. Personnel costs can be calculated as follows: Wages and salaries + Social security costs

16 13 0 Number of employees
This heading is defined as a count of the number of employees. Employees are defined as all persons who, by agreement, work for another resident institutional unit and receive remuneration.

Self-employed person
Self-employed persons are defined as persons who are the sole owners, or joint owners, of the unincorporated enterprise in which they work.

16 11 0 Number of persons employed
This covers all persons – both employed and self-employed.

91 11 0 Per capita productivity
This is "Value added at factor cost" / "Number of persons employed".

91 12 0 Wage adjusted labour productivity
This is gross value added per unit personnel cost: ("Value added at factor cost" / "Personnel costs") × ("Number of employees" / "Number of persons employed").

91 21 0 Unit labour cost
This is labour costs per employee: "Personnel costs" / "Number of employees".

92 11 0 Gross operating rate
It is calculated as: "Gross operating surplus" / "Turnover".

92 11 3 Gross margin
The gross margin is calculated as: "Gross operating surplus" / "Value added at factor cost".

Rate of men and Workers by age
The figures for the land transport (NACE Rev. 1: Subsection 60) are based on Eurostat's Labour Force Survey.

Final Energy consumption
It is measures in million tonnes of oil equivalent. 1 Mtoe = 11 630 GWh. The figures include all means of land transport (i.e. passenger cars etc.).

CO_2 Carbon Dioxide
Carbon dioxide is by far the most important of the gases having an impact on climate change. It is formed at all types of combustion. Carbon dioxide does not directly impair human health, but it is a "greenhouse gas" that traps the earth's heat and contributes to the potential for global warming.

No_x Nitrogen Oxides
Nitrogen oxide emissions are related to air-fuel mixes and combustion temperatures during the burning of fuels. NO_x contribute to ozone formation. Emissions of NO_x have most effect on changes in background ozone.

NMVOCs Nonmethane Volatile Organic Compounds
NMVOCs are a principal component in the chemical and physical atmospheric reactions that form ozone and other photochemical oxidants.

Databases used
This Statistics in focus is based on the annual enterprise statistics (DFT file: enter) of the SBS domain.

Data was also extracted from other domains: lfs (labour force study), road (road transport, measurement goods), milieu (transport and environment reporting mechanism and air pollution).

Statistical unit and size coverage used from 1995 onwards
Greece: Enterprises with a turnover of 15 million GDR or more.

Further information:

➢ **Databases**

New Cronos
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