Road Freight Statistics: Quarterly Provisional Estimates Q1 2011

Statistical Release

29 November 2012

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Road Freight Statistics: Quarterly Provisional Estimates Q1 2011

This Statistical Release presents quarterly information on the domestic and international road freight activity of UK hauliers and of foreign hauliers in the UK.

The information on UK hauliers is based on results from the following three surveys:

- Continuing Survey of Road Goods Transport Great Britain (CSRGT GB)
- Continuing Survey of Road Goods Transport Northern Ireland (CSRGT NI)
- International Road Haulage Survey (IRHS)

Statistics on foreign hauliers in the UK are derived from data supplied to Eurostat by other EU-27 countries.

The 2011 data in this publication are provisional and will be finalised in an annual Road Freight Statistics publication in 2013.

The latest annual data can be found in Road Freight Statistics 2010 here: https://www.gov.uk/government/publications/road-freight-statistics-2010

The key findings from the Road Freight Statistics Quarterly Provisional Estimates Q1 2011 include:

- Between Q1 2010 and Q1 2011, goods moved by UK HGVs in the UK increased by 6 per cent to over 37 billion tonne kilometres.
- Domestic freight activity trends for the UK in recent years broadly mirror those in three of the four other largest EU economies.
- In Q1 2011, there were 1.3 million tonnes of road freight exported from the UK by UK-registered vehicles. This was an increase of 9 per cent compared to Q1 2010. There was a similar weight of goods imported in Q1 2011 (1.4 million tonnes).
- In 2011, there were about 1 billion tonne kilometres of cabotage by foreign hauliers in the UK. Levels of cabotage reported by EU-27 countries in the UK have declined in recent years. The level was 44 per cent lower in 2011 than in 2005.

1. Summary of road freight activity by UK HGVs

- There are two headline figures of road freight activity. These are 'goods lifted' and 'goods moved'. 'Goods lifted' (measured in tonnes) is the weight of goods carried. 'Goods moved', measured in tonne kilometres, is activity that takes into account the weight of the load and the distance it is hauled.
- **Table RFS0144** gives a summary of domestic and international road freight activity by UK (i.e. British and Northern Irish) HGVs. From Q1 2010 to Q1 2011, goods moved by UK HGVs in the United Kingdom increased by 6 per cent to over 37 billion tonne kilometres. Tonnes lifted also increased, by 15 per cent to 424 million tonnes.
- More than 96 per cent of domestic freight lifted and moved by UK vehicles was carried out by British vehicles, the remaining 4 per cent by vehicles registered in Northern Ireland. More detail on the activity of British HGVs is given in Section 2 below and the RFS01 series of tables on the website.

2. Domestic road freight activity by British HGVs

- Domestic road freight activity by GB-registered HGVs in the UK is measured by the Continuing Survey of Road Goods Transport Great Britain (CSRGT GB).
- The amount of goods moved by British HGVs within the UK increased by 5 per cent between Q1 2010 and Q1 2011 to 36 billion tonne kilometres (**Table RFS0101**). The amount of tonnes lifted also increased over that time period by 15 per cent from 355 to 408 million tonnes (**Chart 1**).

Chart 1: Goods lifted and average length of haul by British HGVs, Q1 2004–Q1 2011

Source: CSRGT GB, DfT

- There was a slight upward trend in goods moved from 2004 until mid-2007 followed by significant decreases through into 2009, most likely as a result of the economic recession **(Chart 2)**. Road freight activity by British HGVs in 2009 was around 20 per cent lower than in 2004.
- Through 2010 and Q1 2011, total goods moved have been broadly on an upward trend, although there was a drop in Q4 2010. The reasons for this are not clear, but there may have been some impact from the adverse weather in the winter of 2010. It is estimated that the snowfall during Q4 2010 had a greater impact on traffic levels than the snowfall during Q1 2009 and Q1 2010 (**Table TRA2501**). More generally, HGV traffic levels in Q1 2011 were 11 per cent lower than in Q1 2008.
- The volume of goods lifted and goods moved has been used as an indicator of trends in the wider economy, especially the manufacturing sector. In recent years there has been a broad correlation between quarterly changes in goods moved by British HGVs and quarterly changes in Gross Domestic Product (GDP) **(Chart 2)**. While changes in GDP do not always mirror changes in road freight statistics for the same quarter (and quarterly changes in goods moved from the road freight surveys can fluctuate more), changes in both of these statistics can often be in the same direction.

Chart 2: Quarter-on-quarter changes in GDP and goods moved by British HGVs, 2005–2011

Source: CSRGT, DfT and ONS National Accounts

3. Comparisons with domestic road freight in other countries

- The UK (along with all other EU member states) has a statutory obligation to provide statistics on road freight to the European Statistics Agency (Eurostat). These data are made available on the Eurostat website at: http://epp.eurostat.ec.europa.eu/portal/page/portal/transport/data/database. The Eurostat data on domestic haulage are at UK level and therefore include information on freight activity by both British and Northern Ireland-registered HGVs.
- The trends in domestic freight activity for the UK in recent years broadly mirror the trends in three of the four other largest economies in the EU (Germany, France and Italy) (**Chart 3** and **Table RFS0213**). These nations all showed modest growth in road freight activity until early 2008, then notable decreases through into 2009, followed by steady recovery. The UK has broadly mirrored this pattern although with a steeper decline in activity during 2008 and 2009.
- The one significant exception among the biggest five EU economies is Spain, which saw much faster growth in the pre-recession period but a much steeper fall once the recession began. Unlike in the other four economies, by Q1 2011 there was not yet evidence of a recovery in Spanish road freight activity.
- Road freight data from some countries can show large variations with the time of year so **Chart 3** uses 4-quarter moving averages to smooth the data and show longer-term trends more clearly.

Chart 3: Domestic tonnes lifted in selected EU-27 countries, index of rolling four quarter average

Source: CSRGT, DfT and Eurostat

- On average for the four quarters to Q1 2011, UK HGVs lifted about 400 million tonnes of freight compared to 678 million in Germany, 505 million in France, 379 million in Italy and 374 million in Spain (**Chart 4**). On the same basis, UK HGVs have accounted for between 10 and 13 per cent of the total domestic freight lifted in the EU-27 since 2004.

Chart 4: Domestic tonnes lifted in selected EU-27 countries, average Q2 2010 – Q1 2011

Source: CSRGT, DfT and Eurostat

4. International road freight to and from the UK

- Estimates of international road freight activity by UK HGVs are derived from two surveys run by DfT: the International Road Haulage Survey (IRHS) for British HGVs and the Continuing Survey of Road Goods Transport Northern Ireland (CSRGT NI) for Northern Ireland-registered HGVs.
- In Q1 2011, there were 1.3 million tonnes of road freight exported from the UK by UK-registered vehicles (**Table RFS0201**). This was an increase of 9 per cent compared to Q1 2010. There was a similar amount of goods imported in Q1 2011 (1.4 million tonnes) but over the time period shown road freight imported by UK HGVs has always been higher than exports (**Chart 5**). These figures exclude activity solely within the island of Ireland for consistency with previous road freight publications.
- In 2010, 88 per cent of the tonnage leaving the UK in UK-registered vehicles was unloaded in one of five countries **(Table RFS0203)**: France (32 per cent), Belgium (20 per cent), Germany and the Republic of Ireland (both 13 per cent) and the Netherlands (10 per cent). The same five countries represented the origin of 90 per cent of inward goods in 2010 (**Tables RFS0202**).

Chart 5: Exports and imports by UK HGVs, quarterly Q1 2004 - Q1 2011

Source: International Road Haulage Survey and CSRGT NI

- In addition to this, there were 3.5 million tonnes exported and 4.8 million tonnes imported by foreign HGVs in Q1 2011 (**Tables RFS0214** and **RFS0215**). Although these volumes were about three times higher than the amount of goods imported and exported by road by UK vehicles, they represented only about 1 per cent of the total domestic tonnes lifted in that quarter in the UK.

5. Cabotage within the UK

- Cabotage is the national carriage of goods for hire or reward carried out by non-resident hauliers on a temporary basis in a host Member State. Current cabotage regulations are that every haulier is entitled to perform up to three cabotage operations within a seven day period starting the day after the unloading of the international transport.
- Data on cabotage in EU-27 countries are available from Eurostat and an annual estimate of cabotage for (non-UK) EU-27 HGVs in the UK for 2011 is now available (although quarterly statistics are not available).
- In 2011, there were about 1 billion tonne kilometres of cabotage undertaken by foreign hauliers in the UK (**Chart 6**). Nearly 70 per cent of cabotage in 2011 was undertaken by vehicles from the Republic of Ireland, Netherlands and Poland (Table **RFS212**).
- The cabotage penetration rate is defined as cabotage (in tonne kilometres) as a proportion of the sum of domestic and cabotage tonne kilometres. Between 2004 and 2010 the cabotage penetration rate was around 1 per cent.

- Levels of cabotage in the UK reported by EU-27 countries have declined in recent years. The level was 44 per cent lower in 2011 than in 2005.

Chart 6: Cabotage in the UK and cabotage penetration rate, 2004–2011

Source: Eurostat and CSRGT, DfT

6. Strengths and weaknesses of the data

- The data in the three surveys have been collected according to the methods set out in the manual for implementing the council regulation on statistics on the carriage of goods by road. This regulation provides the legal basis for collection of road freight data and ensures comparability of the information across EU-Member States.
- The Q1 2011 data published here are provisional first estimates and may be subject to revision.
- Users should note that the data are drawn from sample surveys and are thus subject to a degree of sampling error. Confidence intervals for some of the key statistics are presented in Table RFS0143. These are based on the number of forms returned for vehicles that had worked during the survey week.
- There is proportionately more variation in estimates that are based on groups with smaller sample sizes (for example, for quarterly data and data for disaggregations of vehicle types where the population of vehicles is smaller). Users should be aware of this when analysing data in some of the tables in this publication.

- The DfT Road Traffic estimates consistently report higher levels of vehicle kilometres for HGVs than the estimates generated from the Continuing Survey of Road Goods Transport (CSRGT). There are differences in scope between the two data collections that may go to some way to explaining the differences. In response to the National Statistics Assessment of Road Traffic statistics, requirement 4 to:

  > "Alert users to discrepancies between the road freight statistics and road traffic estimates, describe the differences between the two methods of data collection and advise on their respective strengths and limitations in relation to use (para 3.9).",

  DfT will be doing more work to quantify the differences between the two sources.

7. Background notes

- The road freight statistics presented in this release are derived from four sources:
  - **The Continuing Survey of Road Goods Transport Great Britain (CSRGT GB)**
    This survey provides estimates of domestic activity of GB-registered HGVs over 3.5 tonnes Gross Vehicle Weight working in UK.
  - **The International Road Haulage Survey**
    This survey provides estimates of international activity of GB-registered HGVs over 3.5 tonnes Gross Vehicle Weight
  - **The Continuing Survey of Road Goods Transport Northern Ireland (CSRGT NI)**
    This survey provides estimates of domestic and international activity of NI-registered HGVs over 3.5 tonnes Gross Vehicle Weight.
  - **Eurostat Transport Database**
    The statistics on road freight undertaken by foreign-registered vehicles have been taken from the Eurostat Transport Database at:
    http://epp.eurostat.ec.europa.eu/portal/page/portal/transport/data/database
- The Gross Domestic Product series shown in **Chart 2** is quarter on previous year quarter changes of the chain volume measure seasonally adjusted GDP (ONS series identifier *IHYR*). Note that the freight data on the chart have not been seasonally adjusted.
- More detailed background notes, as well as the pre-release access list for these statistics are available here: https://www.gov.uk/technical-guidance-for-transport-statistics-part-2#road-freight-statistics
- National Statistics are produced to high professional standards set out in the National Statistics Code of Practice. They undergo regular quality assurance reviews to ensure they meet customer needs: http://www.statisticsauthority.gov.uk/assessment/code-of-practice/index.html
- In December 2009, the United Kingdom Statistics Authority designated these statistics as National Statistics, in accordance with the Statistics and Registration Service Act 2007 and signifying compliance

with the Code of Practice for Official Statistics. Designation can be broadly interpreted to mean that the statistics:

- meet identified user needs;
- are well explained and readily accessible;
- are produced according to sound methods, and
- are managed impartially and objectively in the public interest.

- The letter of confirmation as National Statistics can be found here: https://assets.digital.cabinet-office.gov.uk/government/uploads/system/uploads/attachment_data/file/8659/16.pdf
- Further quarterly road freight statistics releases will be published in 2013. For further information of release dates, please see the DfT statistics publication schedule here: https://www.gov.uk/government/organisations/department-for-transport/about/statistics#forthcoming-publications

8. Request for feedback

- We are always keen to receive feedback from users of transport statistics. If you have any comments about how the statistics in this release are presented or analysed, please contact us using the details listed on the first page of this release.