



Intelligence Briefing.

Versatility on the road:
unpacking the EU's truck fleet



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Chapter 2

Fleet composition

Truck configurations are based on different types of units: vehicles with their own engine power, and trailers that do not have their own engine power.

The former includes trucks, sometimes called lorries in the UK, that carry their own goods and road tractors that tow a semi-trailer.

A road tractor towing one semi-trailer is known collectively as an **articulated truck**, a **semi-trailer** or simply a **"semi"**



A truck towing one trailer is known collectively as a **road train**.



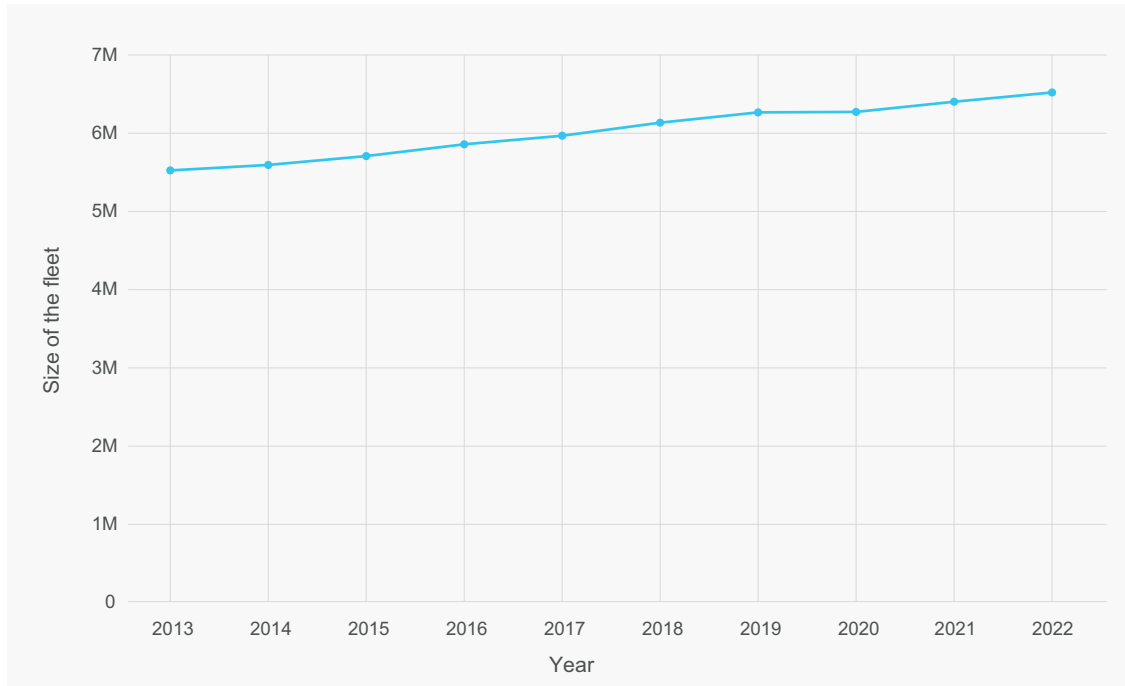
A road tractor or a truck towing two or more trailers is known in the EU as the **European Modular System (EMS)** or alternatively **"eco-trucks"**, **"ecocombi"** or **"eurocombis"**.



The EU's truck fleet consists of over 6.5 million units, excluding vehicles registered in Greece and Slovenia where national data is not available but estimated to be 250,000 vehicles.

The following graph shows the growth of the EU fleet, which has steadily been growing over the past decade, increasing by 1.8% from 2021 to 2022.

Total number of N2 & N3 vehicles in the European Union

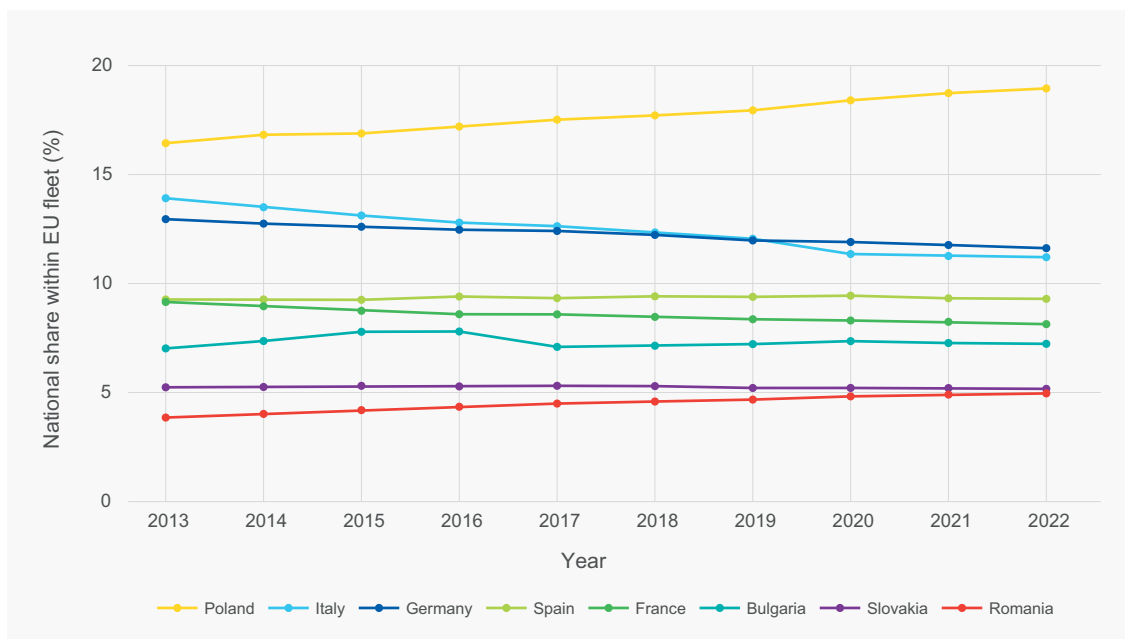


Source: Eurostat ([road_eqs_lorrea](#)) extracted on 2024-04-02

At the national level, Poland has the largest fleet with more than 1.2 million trucks, 19% of the EU's total fleet. The Polish fleet has also been steadily growing over the past decade. This is consistent with the

fact that Polish operators transport the highest volume of goods in the EU compared to other EU countries ([Intelligence Briefing #1](#)). Germany and Italy have the second and third largest fleets.

Largest national N2 & N3 fleets in the European Union

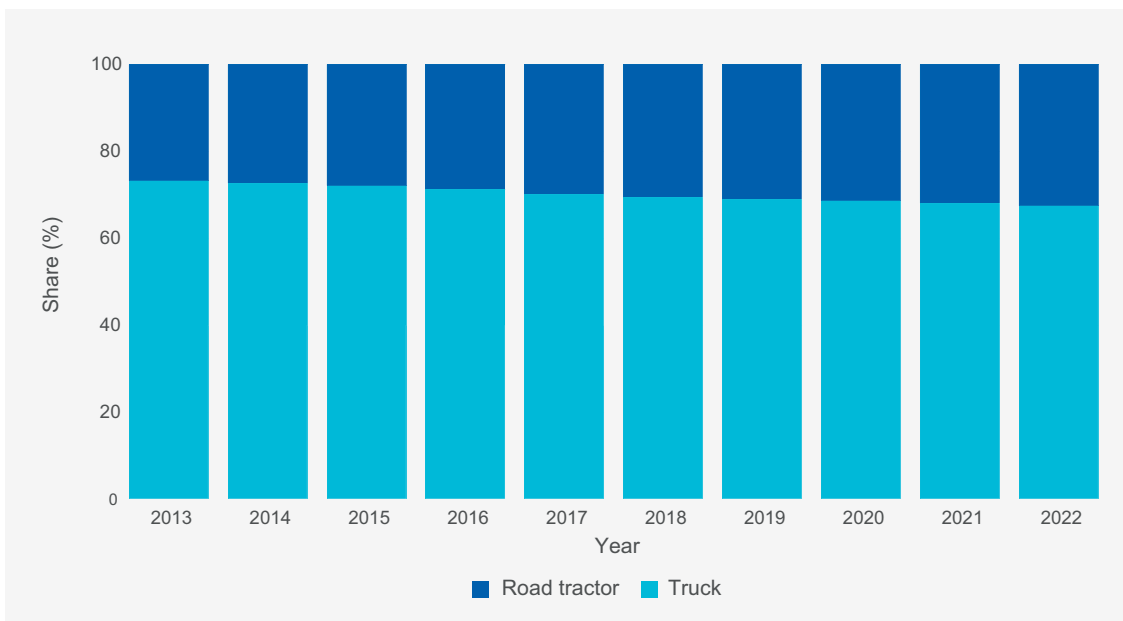


Source: Eurostat ([road_eqs_lorrea](#)) extracted on 2024-04-02

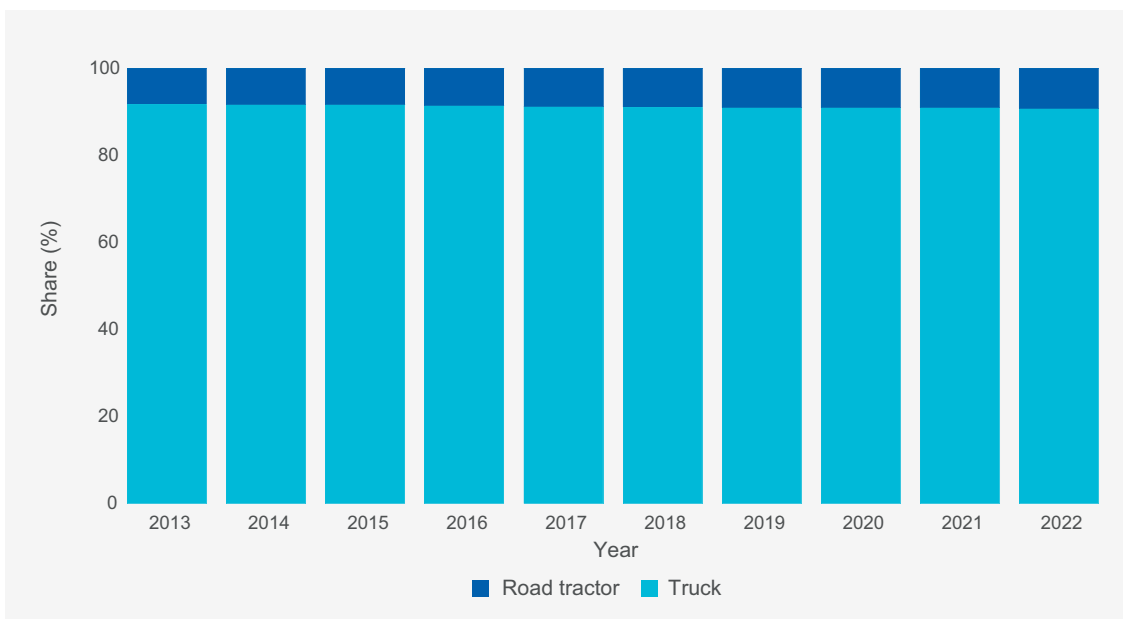
Most of the EU's fleet consists of standard trucks compared to road tractor and trailer combinations. However, the split between trucks and road tractors varies between EU countries due to differences in national operations.

Finland, for example, allows the use of EMS combinations, which favours road trains, thus trucks over road tractors. On the other hand, France favours road tractors, likely due to its road infrastructure and geographical location. With many bordering countries, France requires versatility to comply with neighbouring transport practices.

European Union



Finland



Source: Eurostat ([road_eqs_lorrea](#)) extracted on 2024-04-02