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.

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.
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.
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.

Source: Eurostat [road_eqs_lorroa] extracted on 2024-04-02