

DENMARK

Domestic and International Road Freight Transport

Goods road transport (factual data) by unit, type of transport and time		2007Q1	2007Q2	2007Q3	2007Q4	2008Q1	2008Q2	2008Q3
Weight of goods loaded, 1000 tonnes	ALL TYPES OF TRANSPORT	49741	51498	47492	49167	44929	50946	51838
	National transport	45719	47908	44332	45649	41539	46587	48553
	For hire or reward	37879	39970	36505	35083	32915	38056	38288
	For own account	7840	7938	7827	10566	8623	8530	10265
	International transport, total	4022	3590	3160	3518	3390	4359	3285
	To Denmark from abroad	1777	1610	1400	1420	1538	1894	1345
	From Denmark to abroad	1831	1607	1366	1780	1525	2047	1555
	Other international transport	414	373	394	318	327	418	385
Transport performance, mio. tonne-km	ALL TYPES OF TRANSPORT	5638	5408	4627	5285	4856	5393	4842
	National transport	2995	3141	2629	3033	2623	2838	2832
	For hire or reward	2581	2658	2178	2430	2217	2344	2251
	For own account	414	484	451	604	406	494	580
	International transport, total	2643	2267	1998	2252	2233	2555	2010
	To Denmark from abroad	1214	1052	936	937	1036	1212	894
	From Denmark to abroad	1216	1019	936	1158	1047	1213	990
	Other international transport	213	196	126	157	149	130	125

Note: Covers Danish goods road vehicles over 6 tonnes of permissible laden weight.

Note: This is the most recent data. It has not been possible to update data any further. Data have only been available on a quarterly basis.

Source: Statistics Denmark - StatBank Denmark.

Number of trucks crossing the Danish borders

Number of trucks direction Denmark from Germany and Sweden (across Oresund)						
The development of number of trucks with direction towards Denmark across the in-land border, the bridge across Oresund and by the ferries of Scandlines plc.						
Number of trucks per 24 hours		Q1	Q2	Q3	Q4	Note: This data represents the most recent data, but is only available on an aggregated level. Data have only been available on a quarterly basis.
	2005	4049	4273	4282	4436	
	2006	4313	4614	4714	4768	
	2007	4793	4899	4815	4956	
	2008	4908	4943	4666	4617	

Source: ITD, International Transport Denmark - www.itd.dk

New registrations and stock etc. by unit, type of vehicle, 2007 and 2008

	2007 M01	2007 M02	2007 M03	2007 M04	2007 M05	2007 M06	2007 M07	2007 M08	2007 M09	2007 M10	2007 M11	2007 M12	
New	Vans, total	5296	4778	6386	7345	4557	4601	3184	3765	3664	3881	3978	4649
	Lorries, total	195	244	318	332	326	352	270	287	422	251	273	253
	Road tractors, total	313	275	337	297	372	316	214	282	362	312	245	114
	Trailers, total	2970	2419	4577	5643	5541	5512	4886	4855	3904	4672	2975	1878
	Semi-trailers, total	592	450	545	574	670	530	533	510	553	636	684	391
Stock	Vans, total	461775	464381	468534	474114	476044	478251	479310	480890	482394	483411	484424	486052
	Lorries, total	36058	36106	36261	36498	36609	36711	36678	36713	36807	36640	36544	36484
	Road tractors, total	14605	14714	14855	15029	15178	15290	15202	15357	15489	15508	15444	15323
	Trailers, total	736678	738753	742945	748196	753164	758184	762580	766844	770163	774223	776577	778010
	Semi-trailers, total	33955	34075	34283	34611	34952	35206	35509	35565	35862	36228	36565	36684

2008 M01	2008 M02	2008 M03	2008 M04	2008 M05	2008 M06	2008 M07	2008 M08	2008 M09	2008 M10	2008 M11	2008 M12
3221	3041	3008	3661	3133	3349	2482	2736	2541	2608	1869	2002
284	300	282	358	343	316	296	279	365	331	219	287
294	242	303	310	255	276	173	240	287	290	231	152
2683	2725	3652	5230	5029	4399	4194	3242	3417	3085	1525	1257
788	573	538	675	606	516	431	397	474	495	455	347
485585	485362	485697	486268	486858	487076	486030	486442	485966	484939	483535	482169
36393	36392	36479	36648	36721	36669	36579	36537	36408	36162	35886	35690
15366	15380	15438	15534	15594	15520	15397	15499	15508	15357	15173	14892
780222	782479	785696	790418	794798	798662	802215	804917	807635	810004	811006	811684
37006	37222	37133	37483	37743	37851	37989	38096	38251	38621	38828	38847

Source: Statistics Denmark - StatBank Denmark

Bankruptcies

	January 2008	January 2009	Difference in %	Feb/Jan 07/08	Feb/Jan 08/09	Difference in %
Transport*	10	21	110.0	94	215	128.7

* Note: This category encompasses road freight transportation as well as forwarders, busses, taxis and shipping. So it is an aggregate, which we have not been able to separate further. However, road freight transportation approximately makes out 50 pct. of this number, so it is fairly representative.

Source: Experian, February 3rd 2009.

Weight of goods loaded

The total volume of the weight of goods loaded measured in thousand tonnes has risen by 1.8% from 50,946 thousand tonnes in the 2nd Quarter of 2008 to 51,838 thousand tonnes in the 3rd Quarter. This has increased by 9.2% compared to the 3rd Quarter of 2007.

The development of the latest available periods in 2008 is due to the national part, as the weight of goods loaded in international transport has been declining by 24.6%, a decline which is uniquely stemming from all categories. The weight of goods loaded to Denmark from abroad has fallen by 29%, while the weight of goods loaded from Denmark to abroad have fallen by 24% and other international

transports by 7.9%. Except from the weight of goods loaded from Denmark to abroad, which have risen by 13.8%, all of these are at a lower level in the 3rd Quarter 2008 than at the same time in 2007, as they have been declining by 3.9% and 2.3%, respectively.

The major part of the national transport is made up by "For hire or reward" but both this and "For own account" have experienced growth of 0.6% and 20.3% and has increased by 4.9% and 31.1%, respectively, when compared to the same time in 2007.

It has to be noted, that the progress in the period from 3rd Quarter of 2007 to 3rd Quarter of 2008 primarily is founded in the fact that the level of the former has been very low. Due to this, growth rates tend to be high. Also, there is a high degree of statistical uncertainty surrounding the 3rd Quarter of 2007, which is also the case when a comparison towards neighbouring data is being conducted.

Tonne-kilometre performance

The total transport performance measured in mio. tonne-km has declined by 10.2% from 5,393 mio. tonne-km in the 2nd Quarter of 2008 to 4,842 in the 3rd Quarter of 2008. However, it has still increased by 4.6% compared to in the 3rd Quarter of 2007.

Here, again the development is the primary result of the development of the international part of the transport performance, which is declining by 21.3% from the 2nd Quarter to the 3rd Quarter of 2008, again reflecting a unique development of the sub categories, especially regarding the transport performance stemming from international transport to Denmark from abroad.

Now, also the national part shows signs of decline with a fall of 0.2%, stemming from "For hire and reward" (-4.0%), while "own account" shows quite a rise (17.4%).

However, the transport performance in the 3rd Quarter of 2008 is still 7.7 % higher for the national transport and 0.6 % for the international than in the 3rd Quarter of 2007. "Own account" shows a significant rise by 28.6% in the national part, while the transport performance in the international transport to Denmark from abroad shows a fall of 4.5%.

Again, the same remarks as on the weight of goods loaded have to be made:

The growth from 3rd Quarter of 2007 to 3rd Quarter of 2008 is primarily founded in a very low level of the former, so growth rates tend to be high. The statistical uncertainty surrounding the 3rd Quarter of 2007 is also high, including when a comparison towards neighbouring data is being conducted.

Bankruptcies

The number of bankruptcies in the transport business (also including forwarders, bus operators, taxi companies and shipping) has risen to 21 in January 2009 from 10 at the same time last year or by 110%.

On a yearly basis, the number of bankruptcies has risen from 94 in February/January 2007/2008 to 215 at the same time in 2009 or by 128.7%. So, the number of bankruptcies is rising, although it is increasing from a historically very low level.

New registrations and stock of road freight vehicles

The new registrations of road tractors, trailers and semi-trailers have shown a strong decline from the 2nd Quarter to the 3rd Quarter of 2008 by 34.2%, 17.6% and 23.7%, respectively, while the new registrations of vans and lorries on the other hand have shown an increase of 7.1% and 31.1%.

The level of new registrations of lorries and road tractors are still higher in the 3rd Quarter of 2008 than at the same time in 2007 by 15.5% and 16.5%, respectively, but the level of new registrations of vans, trailers and semi-trailers is lower by 141.6%, 40.7% and 9.7%. The development of the registrations of vans is especially remarkable.

The stock of vans, lorries and road tractors have only shown a small decline from the 2nd Quarter to the 3rd Quarter of 2008 by 0.3%, 0.5% and 1.9%, respectively, while the stock of trailers and semi-trailers are almost unchanged.

The stock of vans, lorries and road tractors have shown a decline from the 3rd Quarter of 2007 to the same time in 2008 by 0.8%, 2.2.% and 2.8%, respectively, while the stock of trailers and semi-trailers is up by 4.2% and 5.6%, respectively.

Cross border traffic

In the 4th quarter of 2008 the number of trucks heading for Denmark across the inland border, the bridge across Oresund and by the ferries of Scandlines plc. has fallen by 49 or by 1.1% compared to the 3rd Quarter of 2008. This is less than the decline from the 2nd to the 3rd Quarter of 2008, where the traffic was reduced by 277 trucks or 5.6%. It is still, though, a large decline compared to the 4th Quarter of 2007.

From here, the number of passing trucks heading for Denmark has fallen by 339 or 6.8%.

The major port of entry for trucks going into or out of Denmark is the inland border with the bridge across Oresund as the second largest.

Measured from 2nd Quarter of 2007 to 2nd Quarter of 2008, the traffic going into and out of Denmark has been declining at the inland border and at the ferries at Kattegat/Skagerrak, while it has been growing at other places (but from a small level) and Oresund and quite moderately at the ferries at Gedser-Rostock and Rodby-Puttgarden and as a total.

Thus, the Danish road freight transport business is affected by the macroeconomic turmoil, where the financial crisis originating in the American market for sub-prime loans has transformed itself into a real economical crisis with consequences for the Danish road freight businesses.

Source: DTL, December 2008

ITD Index of Economic Activity – 4th quarter 2008:

(a) The lorry traffic across the borders

Unlike the figures from the 3rd quarter 2008 there is only a minimal drop in the lorry traffic in the 4th quarter 2008. This is revealed by the recent figures from the ITD Index of Economic Activity. The figures disclose that the traffic is now at the same level as in the second quarter 2006.

A total of 4,617 lorries passed the Danish-German country border, the Sound Bridge and the Fehmarn Belt in the direction of Denmark every day in the 4th quarter 2008. This corresponds to a drop of 49 lorries per day compared to the previous quarter. In comparison, the 3rd quarter 2008 saw a drop from the 2nd quarter of 277 vehicles per day.

(b) Stable market shares

The Danish market shares have not dropped as drastically as was the tendency during the past few years. This quarter the Danish market share only dropped from 21.6 per cent to 21 per cent. The German share, which was increasing heavily in the last censuses, does not reveal any large fluctuations in this quarter, only a minor drop of 0.2 per cent.

German vehicles remain the most dominating across the borders and the total figure is 44 per cent. Second comes Denmark with 21 per cent and third Eastern Europe with 18 per cent – which is also a minor increase of 0.6 per cent.

(c) Positive stability

Since 2005 it has been customary that the number of vehicles crossing the borders has seen the largest increase in precisely the 4th quarter. For the first time we see an almost stable census. In the light of the financial crisis and declining transport activities, ITD finds that this Index of Economic Activity is positive ... it remains [however] much too uncertain to start talking about a stabilization of the market.

[The ITD Index of Economic Activity can be downloaded at www.itd.dk]

Source: ITD