

How Hyperlocal estimates European freight flows

From official trade and industry data to regional freight-market estimates.

Hyperlocal does not try to count every truck on the road. It uses a consistent modelling framework to estimate the wider addressable market - across regions, industries and freight types.

Modelled market

Designed to estimate total market flows rather than reproduce a partial vehicle feed.

Regional detail

Country-level industry flows are allocated to NUTS2 regions using industrial concentration.

Freight volume

Trade value is translated into tonnage using industry-specific assumptions.



What the data is - and what it is not

Hyperlocal is a **systematic estimate of freight-market flows** built from trade data, industry-location data and a set of transparent conversion assumptions.

Important: the figures are estimates, not observed truck movements. Their value is consistency: the same modelling logic is applied across markets so lanes and industries can be compared on a common basis.

WHAT IT IS NOT

A truck-by-truck count

We do not present Hyperlocal as a feed of individual truck movements between postcodes. Any such source is, by definition, limited to the vehicles and transactions visible to that source.

WHAT IT IS

A model of the wider market

We start with official country-to-country industry flows and progressively allocate and convert them into regional estimates of physical freight demand.

The model in five steps

1

Start with official industry flows

Eurostat data provide country-to-country flows by supplying and receiving industry.

2

Allocate the origin to regions

Industry employment concentration is used to estimate where within the exporting country the activity is located.

3

Allocate the destination to regions

The same logic is applied to the receiving industry in the destination country.

4

Convert value into freight volume

Industry-level transport shares and value density convert trade value into estimated tonnes by freight type.

5

Convert tonnes into estimated loads

Representative payload assumptions translate tonnage into shipment counts. Postal codes are mapped to NUTS2 regions using the European Commission's GISCO database.

From trade value to estimated loads

The example below shows how one country-to-country industry flow is progressively turned into a region-to-region freight estimate. The figures are illustrative and follow the values in the methodology note.



1. Country-industry flow	NL chemicals → ES machinery & equipment	EUR 4.276m
2. Origin allocation	23% allocated to Zuid-Holland	EUR 0.984m
3. Destination allocation	27% allocated to Cataluna	EUR 0.266m
4. Freight-type allocation	40% assumed to move as liquid bulk	EUR 0.106m
5. Value to tonnes	Using an average value density of EUR 1,800 per tonne	~59 t
6. Tonnes to loads	Using an illustrative 25-tonne payload	~2.4 loads

The important point is the process, not the single example. The same calculation is applied across industry pairs and regional combinations. Once those estimates are aggregated, Hyperlocal can describe the relative size and composition of freight markets between regions.

Rounding explains small differences between intermediate values. This example demonstrates the spatial and volumetric logic; it is not a claim that the individual loads shown above were directly observed.

Assumptions, limitations and intended use

No model of a continent-wide freight market is observation-free. Hyperlocal therefore makes its main assumptions explicit so users can interpret the outputs correctly.

Regional concentration

Industry employment is used as a proxy for the geographic distribution of supplying and receiving activity within each country.

Transport mix

Freight-type shares are estimated at industry level. The mix is therefore representative rather than shipment-specific.

Value density

Each industry uses a representative EUR-per-tonne assumption. High-value specialty products and low-value bulk products can differ materially from the average.

Payload

Estimated tonnes are converted to loads using representative payload assumptions. Actual loads vary by product, equipment and operating conditions.

How Hyperlocal data should be used

- + Compare the relative size of freight lanes and regional markets.
- + Understand which shipper industries contribute to estimated demand.
- + Identify markets or lanes that deserve commercial investigation.
- + Benchmark opportunities outside a carrier's own network data.

Geographic resolution

Core calculations use **NUTS2 regions**. Postal codes are then mapped to the nearest NUTS2 region using the European Commission's GISCO database. Requests using the first two postcode characters are also supported.

THE PRACTICAL TAKEAWAY

Use Hyperlocal as a consistent market estimate - not as an audited count of individual vehicle movements.

Our aim is transparency. The model does not claim that every movement is directly observed; it provides a common framework for comparing European freight markets using the same underlying logic.