



# **The Future of European Road Transport**



# Future of the European Road Transport

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**Infrastructure**

**Technical**

**Operational**

• **Drivers**

**Financial**







# Future of the European Road Transport

Stand 2006/2007	FI <sup>8</sup>
Height (m) / Höhe (m)	4,2
Width (m) / Breite (m)	
All vehicles / Alle Fahrzeuge	2,55
Superstructures of conditioned vehicles / Überbauten von angepassten Fahrzeugen	2,6
Length (m) / Länge (m)	
Motor vehicle (other than a bus) / Kraftfahrzeug (außer einem Bus)	12
Trailer (Königszapfen bis Hinterkante)	12
Articulated vehicle	16,5
Road train / Straßenzug	25,25
Axle weight (t)	
single axle / einzelne Achse	10
drive axle / Antriebsachse	11,5
tandem axle / Tandemachse	
- motor vehicle / Kraftfahrzeug	18
with air suspension / mit Luftaufhängung	19
- trailer / semi-trailer / Anhänger	
Sattelanhänger	20
tridem axle	24

Maximum permitted weight (t)	
Motor vehicle	
- 2 axles / 2 Achsen	18
- 3 axles / 3 Achsen	26 <sup>1</sup>
- 4 axles / 4 Achsen	32 <sup>2</sup>
Trailer	
- 2 axles / 2 Achsen	20
- 3 axles / 3 Achsen	30
Articulated vehicle	
- 3 axles (2+1) / 3 Achsen (2+1)	28
- 4 axles (2+2) / 4 Achsen (2+2)	38
- 5 axles (2+3) / 5 Achsen (2+3)	42
- 5 axles (3+2) / 5 Achsen (3+2)	46
- 6 axles (3+3) / 6 Achsen (3+3)	48
- container transport (3+2/3) / Containertransport (3+2/3)	48
Road train	
- 4 axles (2+2) / 4 Achsen (2+2)	36
- 5 axles (2+3) / 5 Achsen (2+3)	44
- 5 axles (3+2) / 5 Achsen (3+2)	44
- 6 axles (3+3) / 6 Achsen (3+3)	53 <sup>9</sup>
	60



# Future of the European Road Transport

Stand 2006/2007	RF
<b>Height (m) / Höhe (m)</b>	7
<b>Width (m) / Breite (m)</b>	
All vehicles / Alle Fahrzeuge	2,55
Superstructures of conditioned vehicles / Überbauten von angepassten Fahrzeugen	2,6
<b>Length (m) / Länge (m)</b>	
Motor vehicle (other than a bus) / Kraftfahrzeug (außer einem Bus)	12
Trailer (Königszapfen bis Hinterkante)	12
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tandem axle / Tandemachse	
- motor vehicle / Kraftfahrzeug	
with air suspension / mit Luftaufhängung	
- trailer / semi-trailer / Anhänger	
Sattelanhänger	
tridem axle	

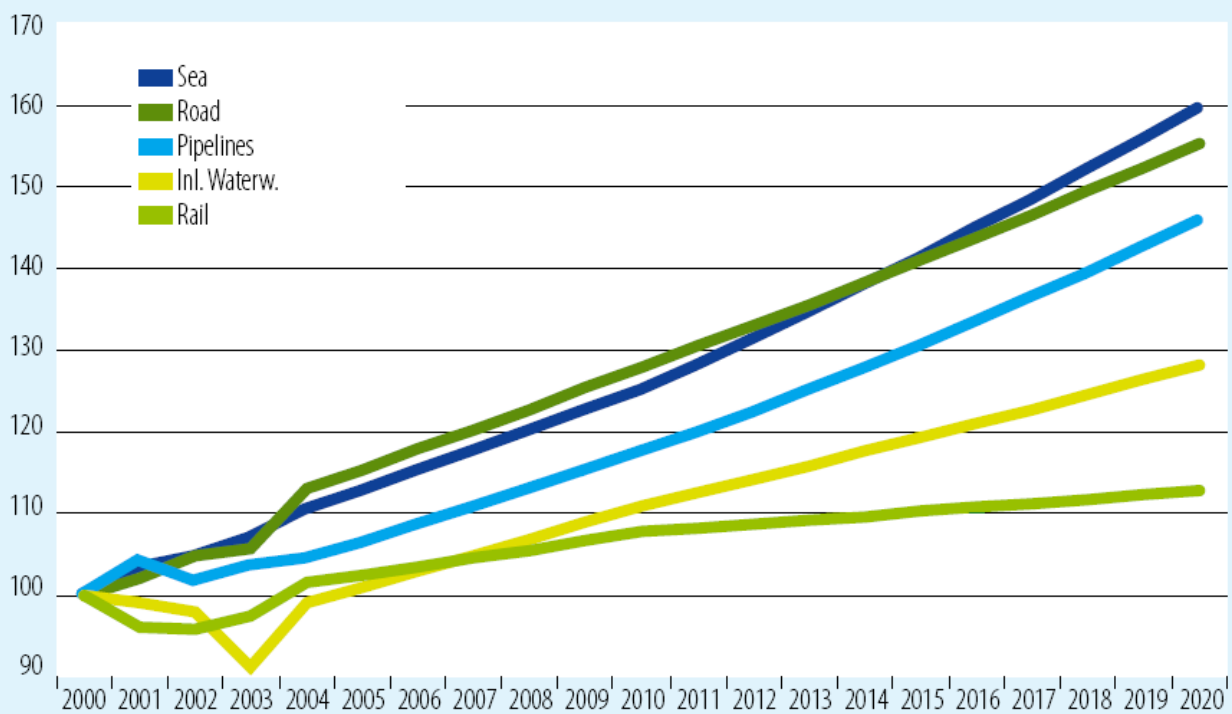
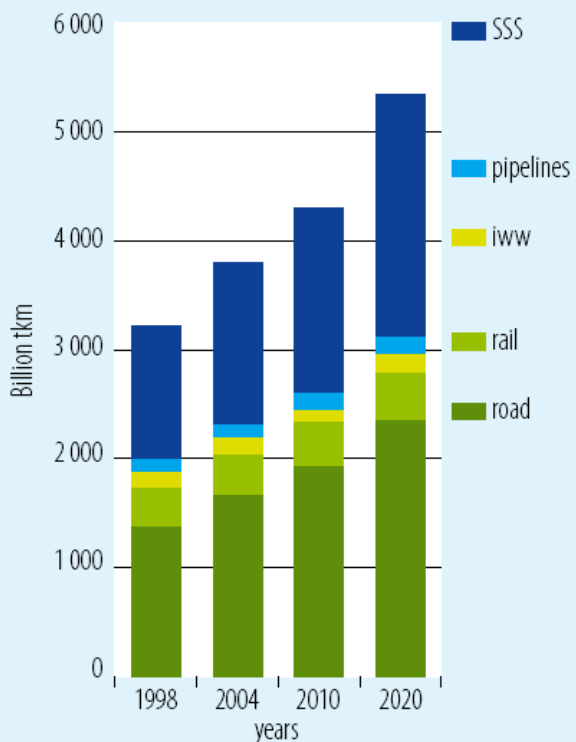
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# Future of the European Road Transport

## Traffic growth in Europe 2000-2020

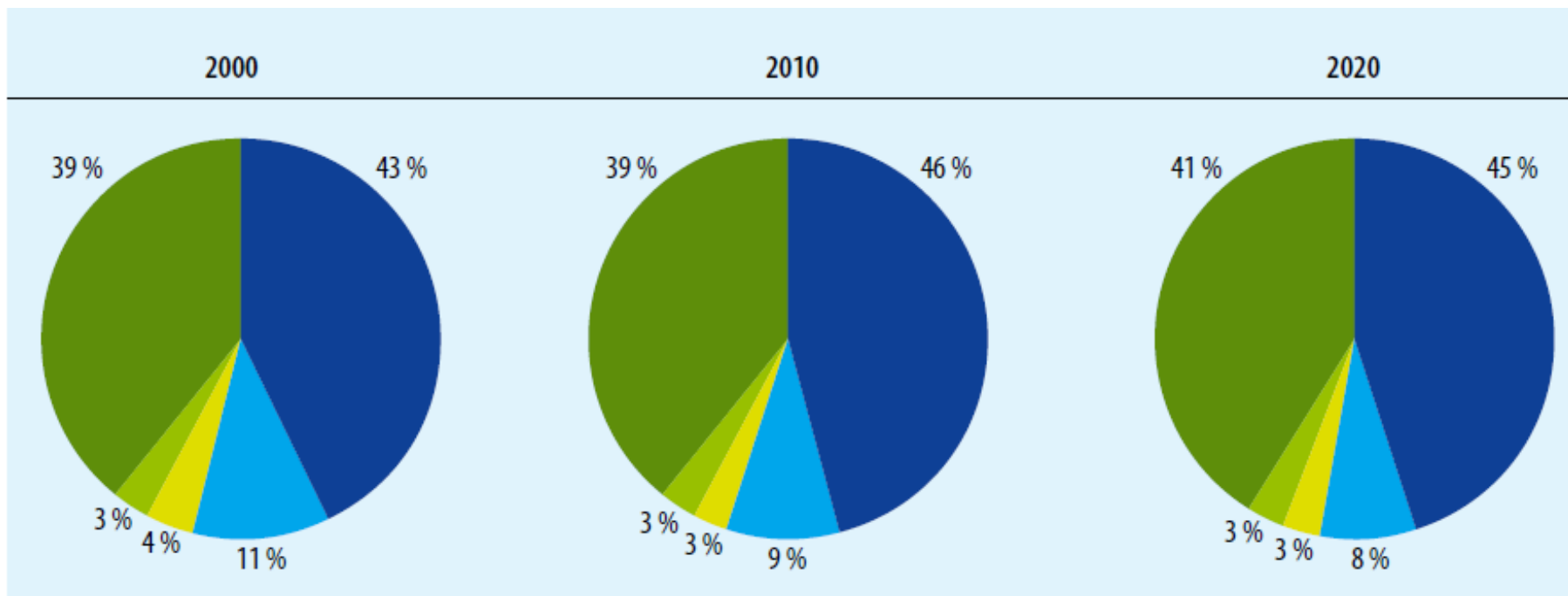
Freight transport EU-25





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## Evolution of modal split in freight transport 2000-20







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**All modes must become more environmentally friendly, safe and energy efficient.**

**Finally, co-modality, i.e. the efficient use of different modes on their own and in combination will result in an optimal and sustainable utilisation of resources.**

**This approach offers the best guarantees to achieve at the same time a high level of both mobility and of environmental protection.**





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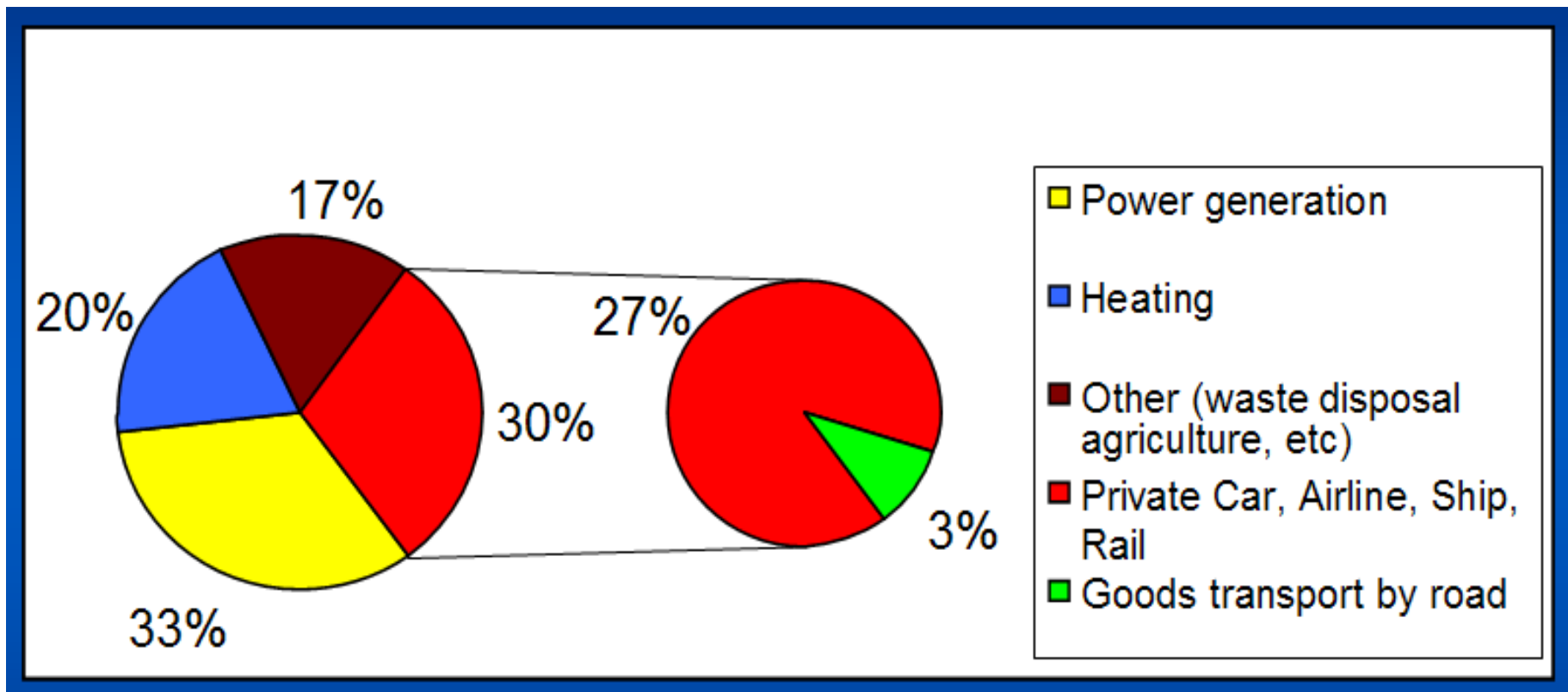
# Future of the European Road Transport





# Future of the European Road Transport

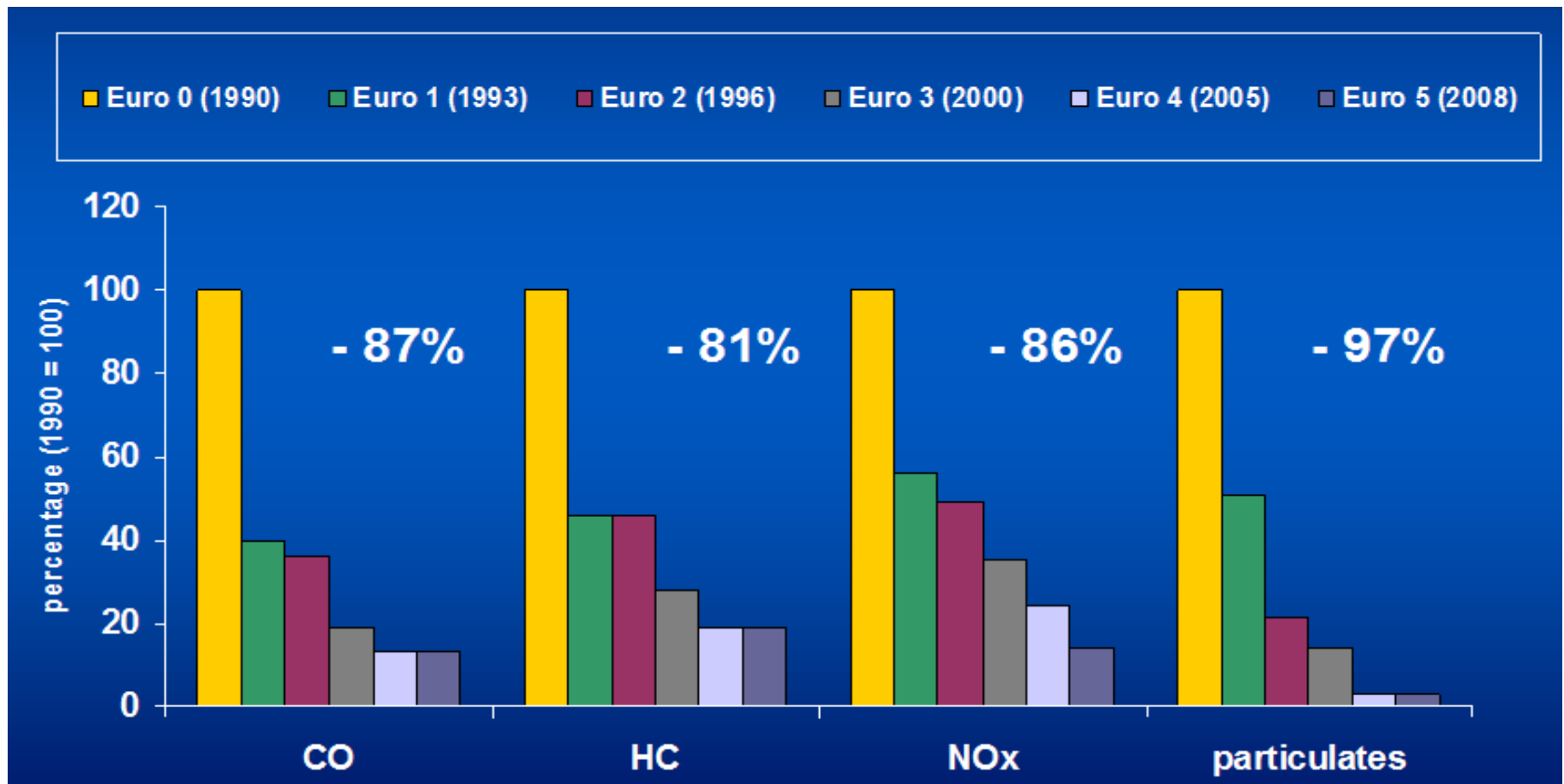
## Who produces CO<sub>2</sub>





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## Evolution of Commercial Vehicle Emission Standards in the EU

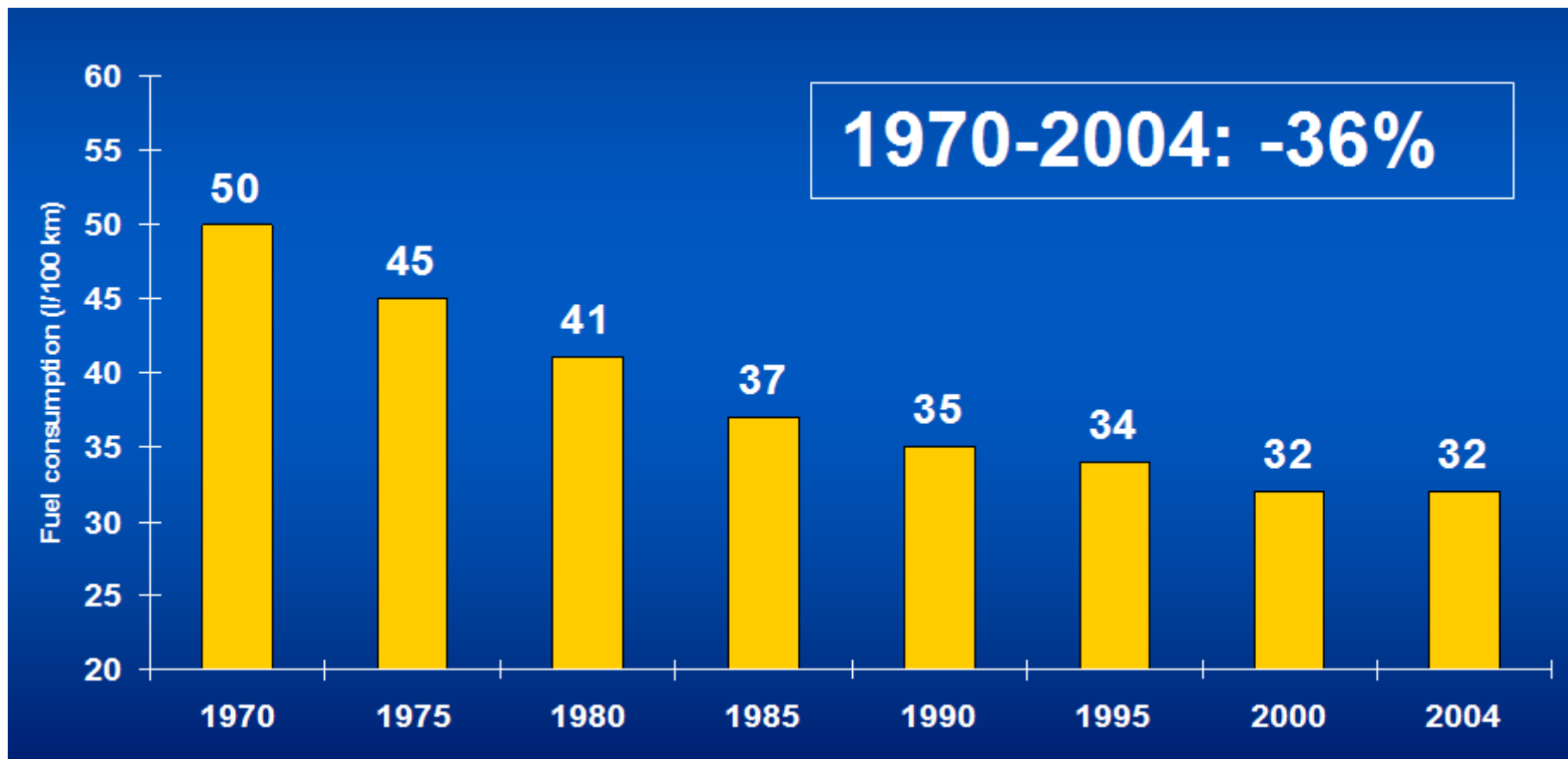






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## Evolution of fuel consumption 40-tonne truck







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Eco-Liner





# Future of the European Road Transport



## Four scenarios for 2020

- ★ Scenario 1: “Business as usual”. This first scenario assumes no changes to the Directive. All other scenarios take this one as the reference/base case.
- ★ Scenario 2: “LHV Full option”: Europe-wide permission to use 25.25 m 60 t trucks. The usage of LHVs on regional roads may be restricted.
- ★ Scenario 3: “Corridor/Coalition”: LHVs of 25.25 m 60 t are allowed in some countries, while Europe-wide only 16.5/18.75 m 40 t trucks are allowed. The coalition of 6 European countries: NL, BE, DE, SE, FI, DK was included in the calculation.
- ★ Scenario 4: “Intermediate”: Europe-wide permission for up to 17.8m/20.75 m, 44 t trucks (thus allowing a longer semi-trailer or trailer and retaining the traditional two-vehicle combination). This scenario represents a relaxation in vehicle constraints giving around 10% increase in volume and 15% increase in gross weight.



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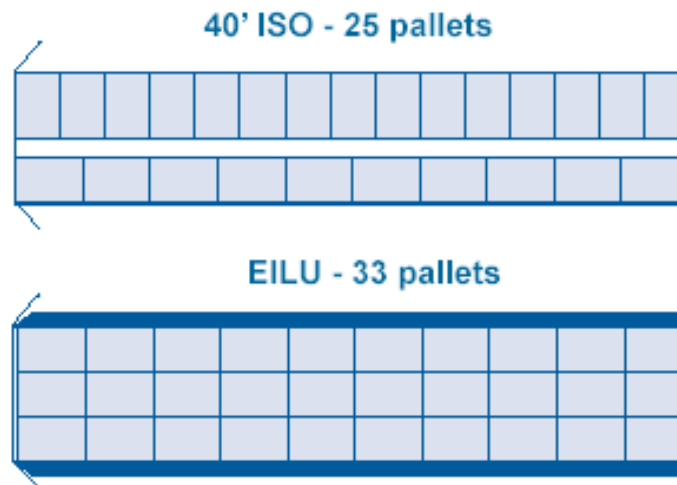


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## 45ft Pallet wide container

**Below designs shows you the difference between an iso (standard 40ft) container and the 45ft pallet wide container.**







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## Telematics



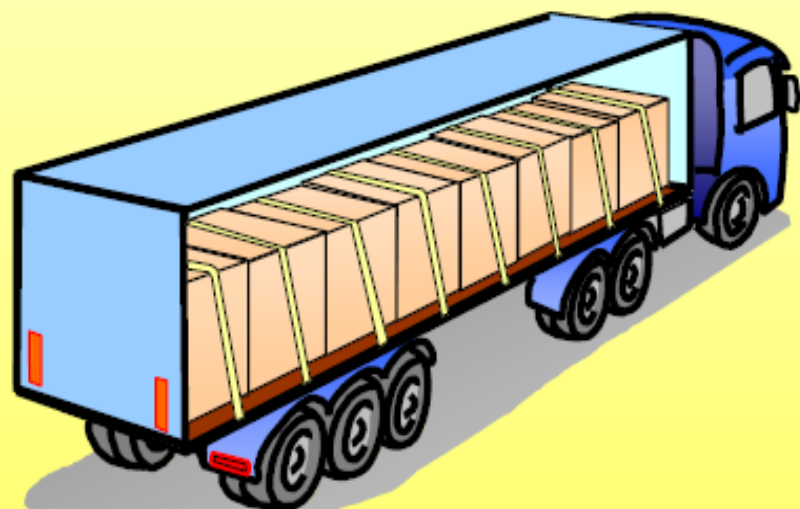
500 km





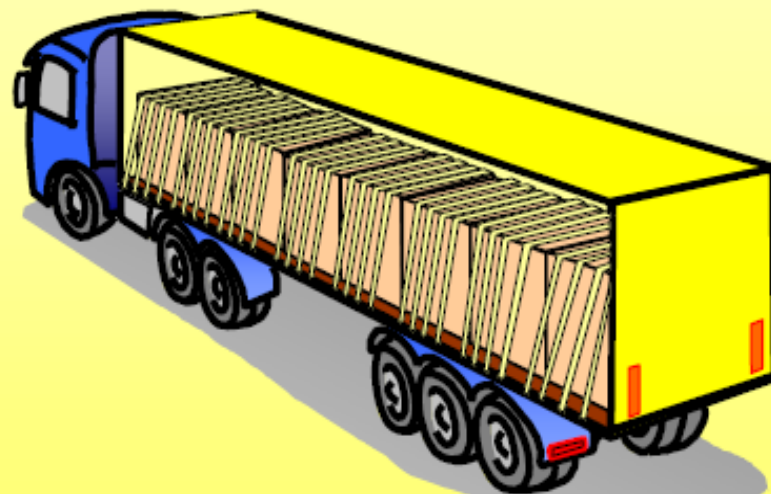
# Future of the European Road Transport

IMO Guidelines



**8 belts**

EN 12195-1

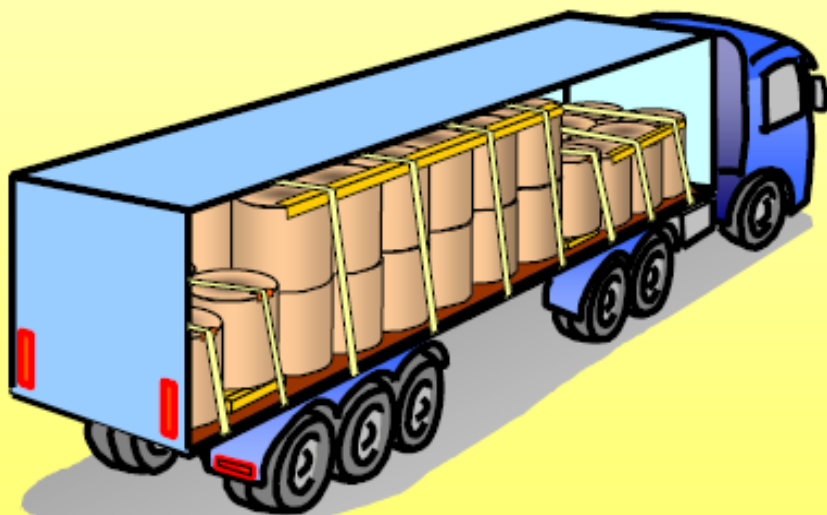


**32 belts**



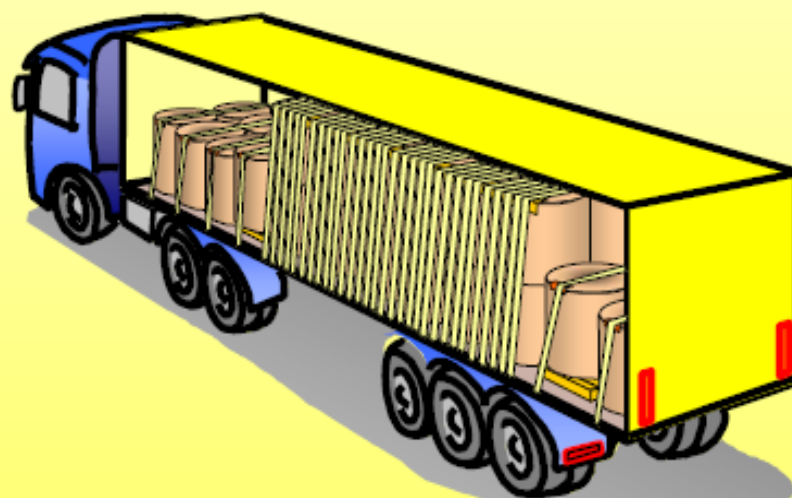
# Future of the European Road Transport

IMO Guidelines



**9 belts**

EN 12195-1



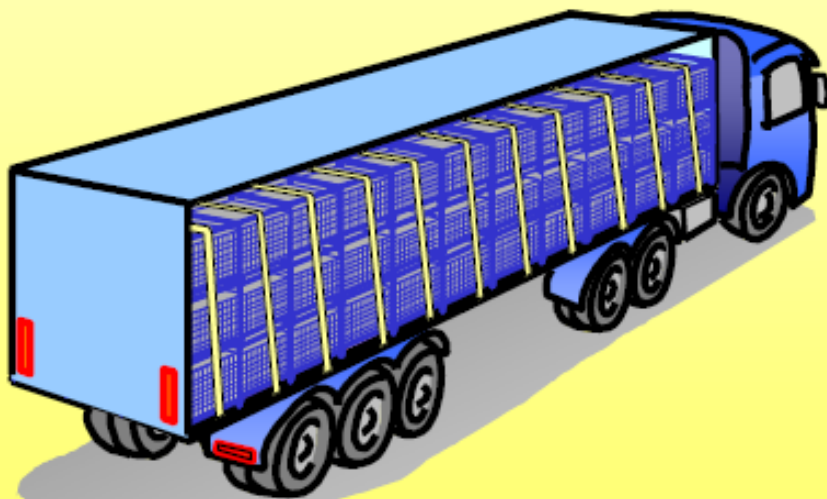
**36 belts**





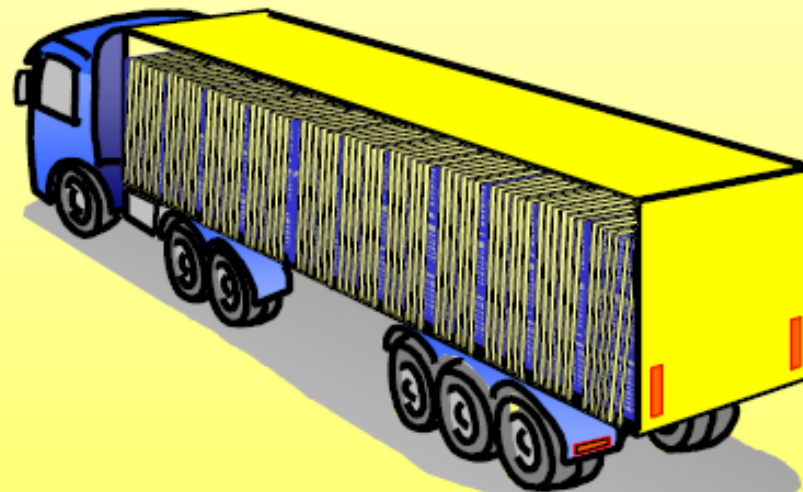
# Future of the European Road Transport

IMO Guidelines



**11 belts**

EN 12195-1



**66 belts**



# Future of the European Road Transport

**IMO Guidelines**



**2 belts**

**EN 12195-1**



**30 belts**

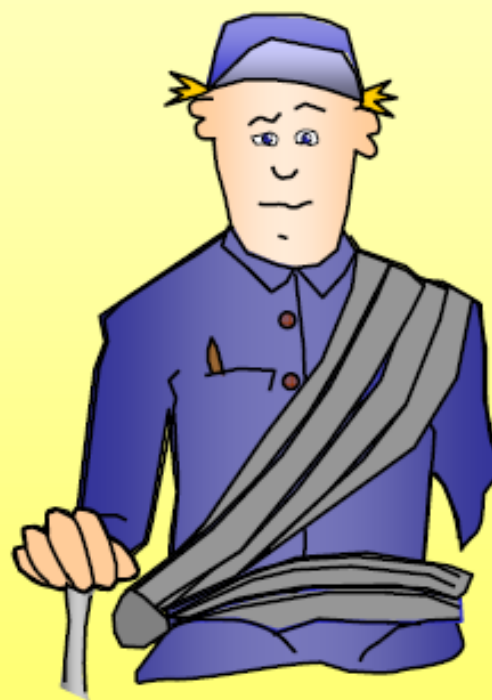


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*Safe is Enough*



**IMO Guidelines**



**EN 12195-1**



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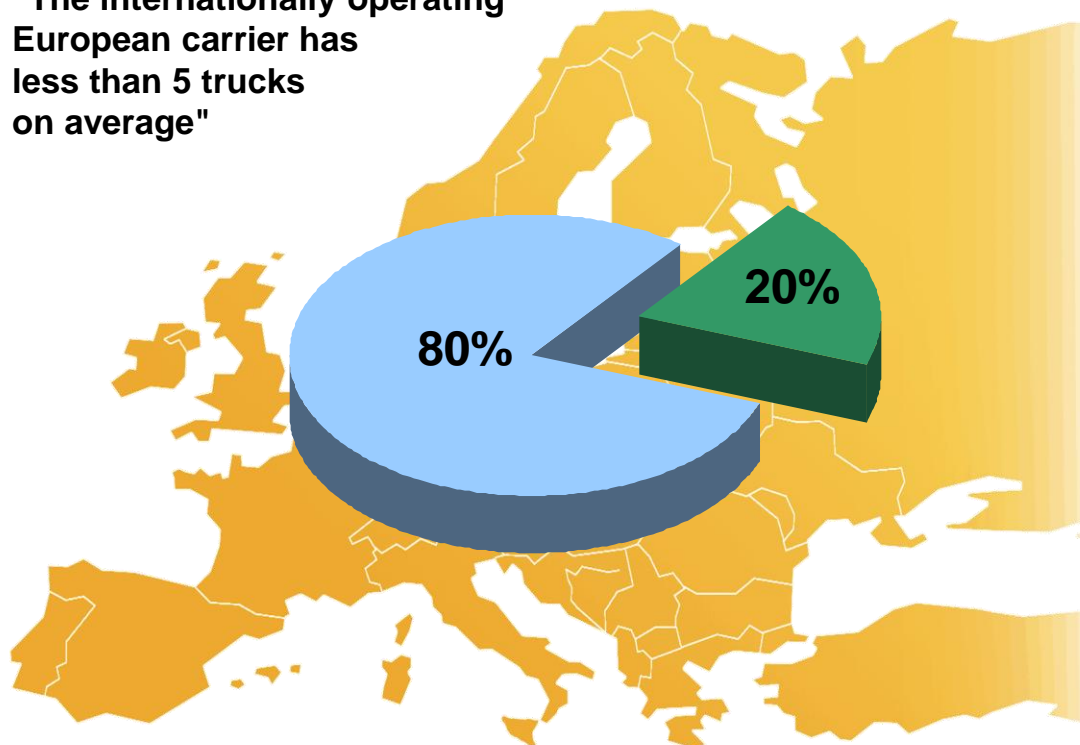




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## Average fleet size

"The internationally operating European carrier has less than 5 trucks on average"



■ Small and medium sized carriers up to 20 trucks

■ Carriers with more than 20 trucks



# Future of the European Road Transport

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## Advance Truck Load Firms (ATLF)

- Single point of entry
- Central planning
- Full geographical coverage
- Economies of scale
- Telematics and navigation
- Driver get tired, trucks don't





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**A young Elvis Presley was once advised:**

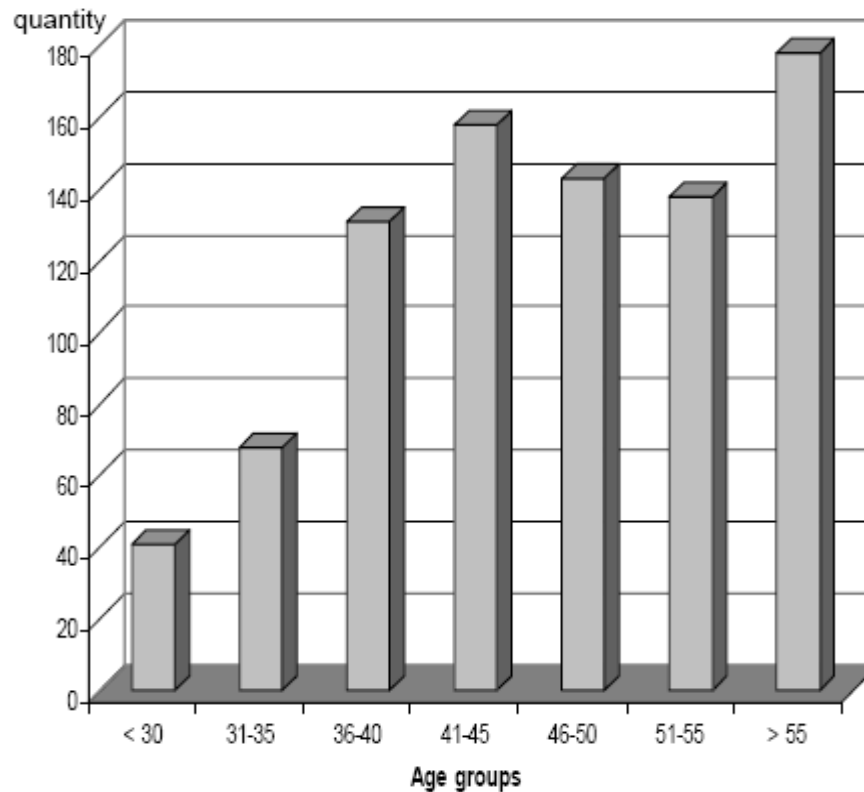
**“Stick to driving a truck, because you’ll never make it as a singer.”**



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## Cost Driver - Labour

### Drivers' aging structure in Europe



**Lack of younger drivers**



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# Future of the European Road Transport

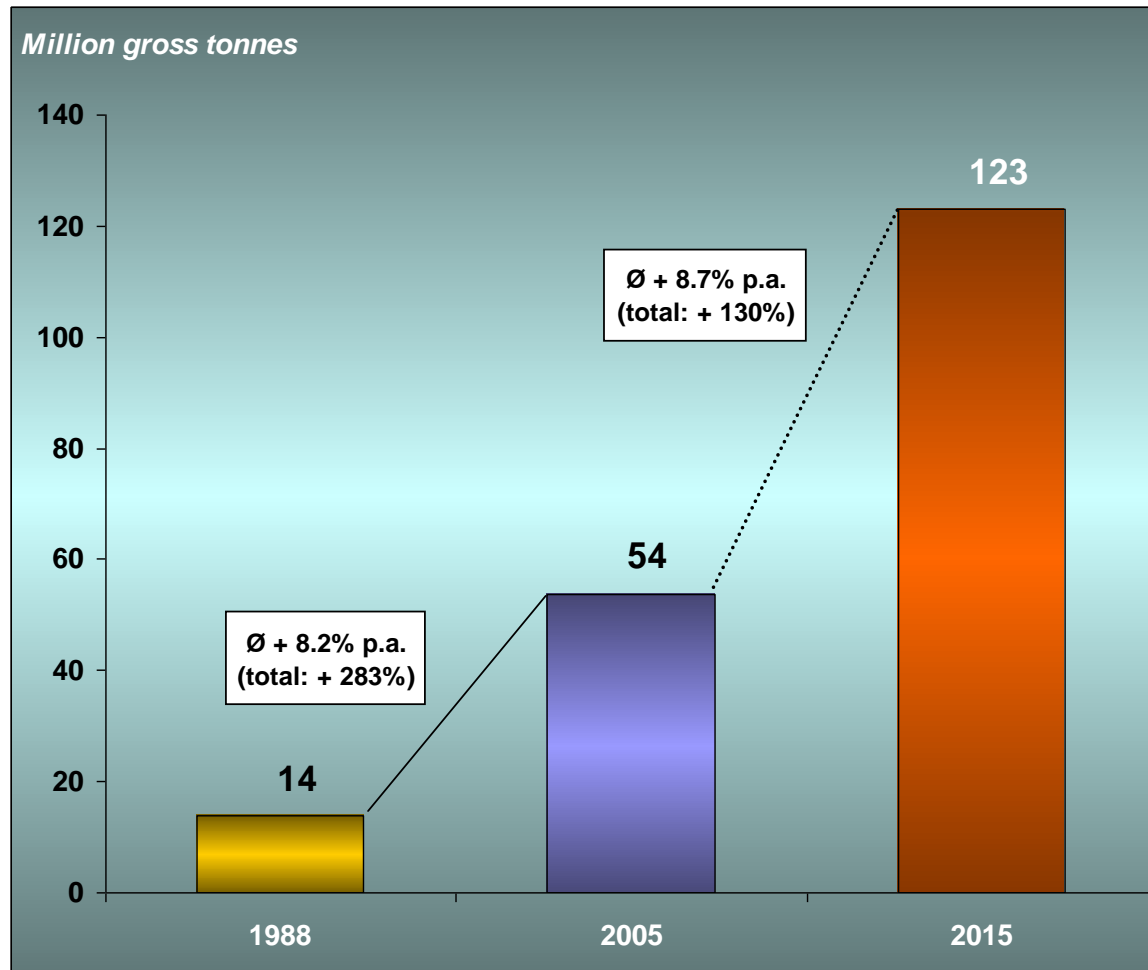
## Unaccompanied Intermodal Transport





# Future of the European Road Transport

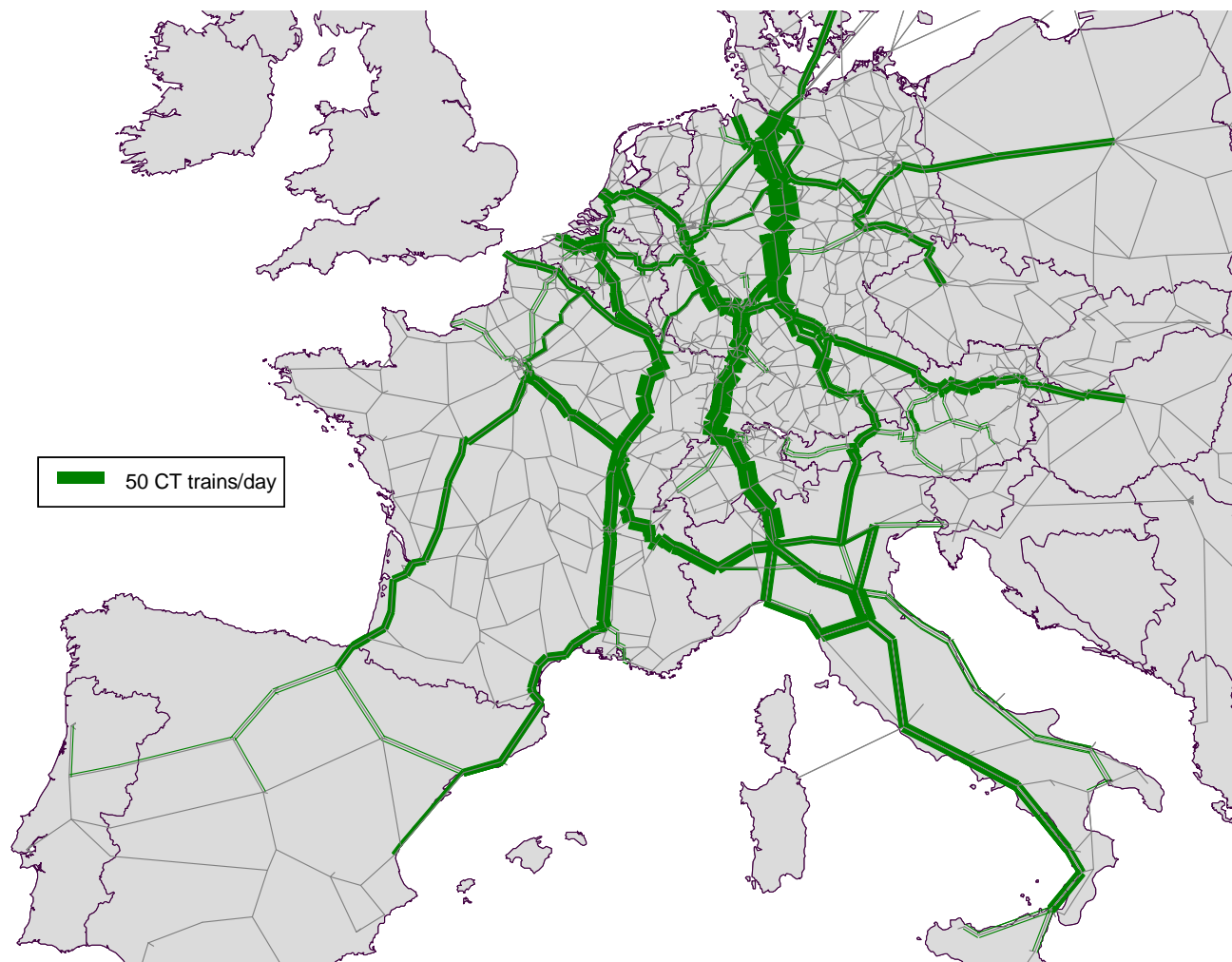
## International intermodal traffic in Europe: goods moved 1988/2005/2015





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## Intermodal trains on the European rail network: 2015





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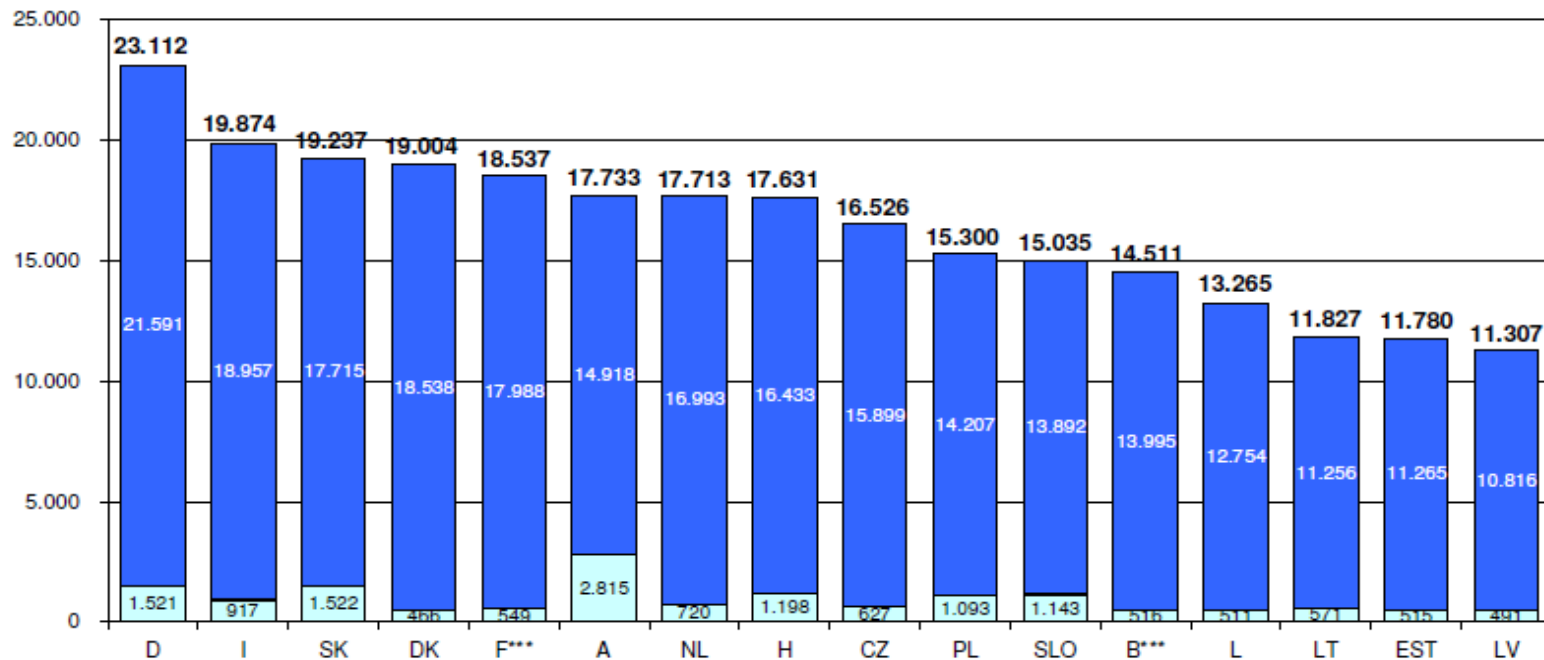
## Jahresabgabenbelastung eines 40 t-Lastzuges

(EURO II mit Luftfederung im Deutschlandverkehr)

Jahresfahrleistung: 135.000 km; Kraftstoffverbrauch: 34 Liter/100 km

□ Kraftfahrzeugsteuer\*    ■ Mineralölsteuer\*\*

Angaben in € pro Jahr



Quellen: Europäische Kommission, EU-Mitgliedstaaten, Berechnungen des BGL

\* Stand: August 2004

\*\* Stand: Januar 2006 (in B, L, PL auf schwefelarmen Diesel; in D, H, NL, auf schwefelfreien Diesel; in DK einschl. CO<sub>2</sub>-Steuer)

\*\*\* Unter Berücksichtigung der Mineralölsteuerermäßigung auf gewerblich genutzten Dieselmotorkraftstoff in B = 3,64 Cent/Liter, in F = 2,5 Cent/Liter



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The Commission's own impact assessment states on page 59:

**”Charging freight transport might have negative effect on industry and services.”**



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Ari Vatanen, report to the European Parliament:

**The main objective of the European transport policy should be to ensure that road transport operates smoothly, because it meets the overwhelming majority of Europe's traffic requirements.**



# Future of the European Road Transport

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- **Raise awareness among all parties involved**
- **The future of the European road transport, in one way or the other, is also our future.**



# Future of the European Road Transport

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Mid term review 2006:

**The mobility of goods and citizens, apart from being a right, also creates cohesion and is an essential element of the competitiveness of European industry and services.**



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