Shortage of truck drivers

barrier to economic growth

German Dutch Logistics Conference

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introduction

In 2019:

17.681.545 trucks

passed the Dutch-German border crossing points.

This is equivalent to **30,3%** of all international truck movements in and out of Germany. (2nd: Austria 11.458.195; 3rd: Poland: 9.276.943)

This underlines the significance of the Dutch-German relation for the road transport business on both sides.

source: Bundesamt für Güterverkehr; Mautstatistik 2019

content

aspects

- demand
- infrastructure
- environment
- personnel

check up on some major of aspects of road transport

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aspect

demand

picture: Jochen Köppen

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demand

forecast of revenue and performance of transport modes

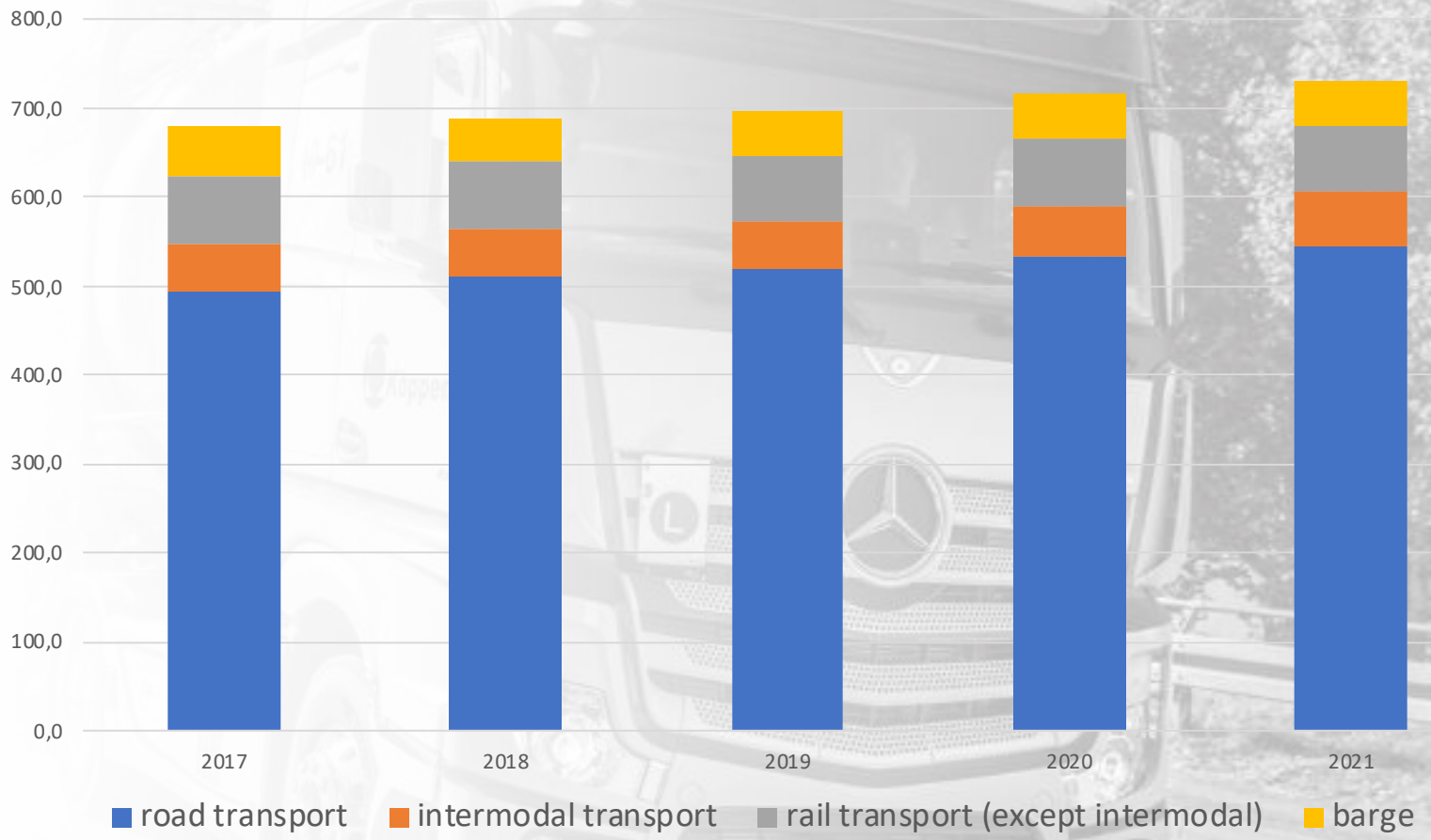
	2017	2018	2019	2020	2021	18/17	19/18	20/19	21/20
transport revenue [Mio. t]									
road transport	3.886,4	3.758,5	3.799,4	3.871,1	3.929,4	2,0%	1,1%	1,9%	1,5%
rail transport	401,4	402,7	398,2	403,6	406,7	0,4%	-1,1%	1,3%	0,8%
of this: intermodal transport	*105,0*	*106,8*	*110,5*	*115,7*	*120,3*	*1,7%*	*3,5%*	*4,6%*	*4,0%*
barge transport	227,7	197,9	207,8	208,9	208,2	-11,1%	5,0%	0,5%	-0,3%
pipelines	90,9	84,5	79,2	79,1	79,0	-7,1%	-6,2%	-0,2%	-0,1%
air freight	4,8	4,9	4,9	5,0	5,0	1,0%	0,9%	1,7%	1,3%
total	**4.406,0**	**4.448,5**	**4.489,6**	**4.567,7**	**4.628,3**	**1,6%**	**4,4%**	**1,8%**	**1,5%**
transport performance [bn tkm]									
road transport	493,8	510,2	517,7	531,8	545,5	3,3%	1,5%	2,7%	2,6%
rail transport	129,4	130,8	129,4	132,6	135,2	1,1%	-1,1%	2,5%	2,0%
of this: intermodal transport	*53,0*	*53,6*	*55,3*	*57,9*	*60,2*	*1,3%*	*3,1%*	*4,6%*	*4,0%*
barge transport	55,5	46,9	50,5	50,8	50,8	-15,5%	7,7%	0,6%	-0,1%
pipelines	18,2	17,2	15,8	15,8	15,8	-5,5%	-8,3%	0,0%	0,0%
air freight	1,6	1,6	1,6	1,6	1,7	1,2%	0,2%	0,6%	0,8%
total	**698,5**	**706,8**	**715,0**	**732,7**	**749,0**	**1,2%**	**1,2%**	**2,5%**	**2,2%**

source: Bundesamt für Güterverkehr; Verkehrsprognose Sommer 2019; August 2018

demand

modal split
[bn tkm]

share of road transport performed:
(72,8% > 74,6%)



source: Bundesamt für Güterverkehr; Verkehrsprognose Somme 2019; August 2018

demand

changes in cargo structure:

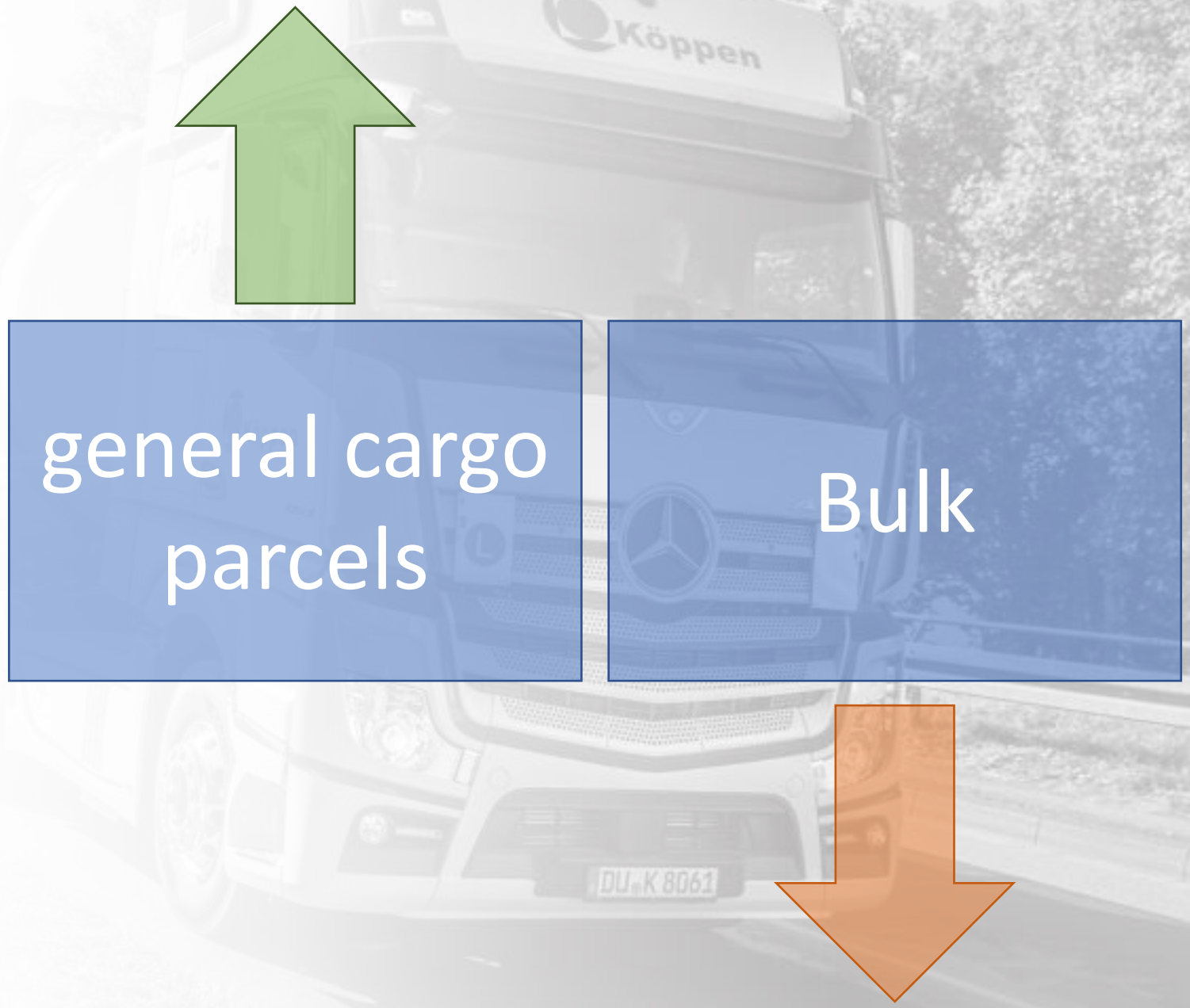
German exit of coal-fired power generation (loss of **40 Mio. t p.a.**)

decrease on **petroleum products** (aviation fuel)

hinterland **steel production** uncertainty

product diversification reduces volume of shipments

E-commerce generates more parcel shipments



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aspects

- demand ✓
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aspect

infrastructure

picture: Jochen Köppen

Köppen

picture: Strassen.NRW, Pressebilder

infrastructure

road

various roads & Autobahnen <u>are</u> under construction; refurbished, lanes added

Rhine bridges A1, A40; replacements ongoing

advantage: time

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infrastructure
rail

focus on passenger transport

cargo tracks often unelectrified, single-track

connections to Betuwe line, Brenner-, Gotthard-, Ceneri-Base-Tunnel missing, **in delay**

picture: Deutsche Bahn, homepage, Pressemitteilung, 2

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infrastructure

barge

Low water situation in the rivers; deepenings politically unenforcable

Canal infrastructure more than **100 years old**

refurbishment is starting

Picture: Bundesverband der Binnenschiffer BD

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aspects

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aspect
environment

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environment
road

powertrain technology transition
from DIESEL to:

- e-truck
- Hybrid
- Hydrogen H_2

CO_2 & NO_X free

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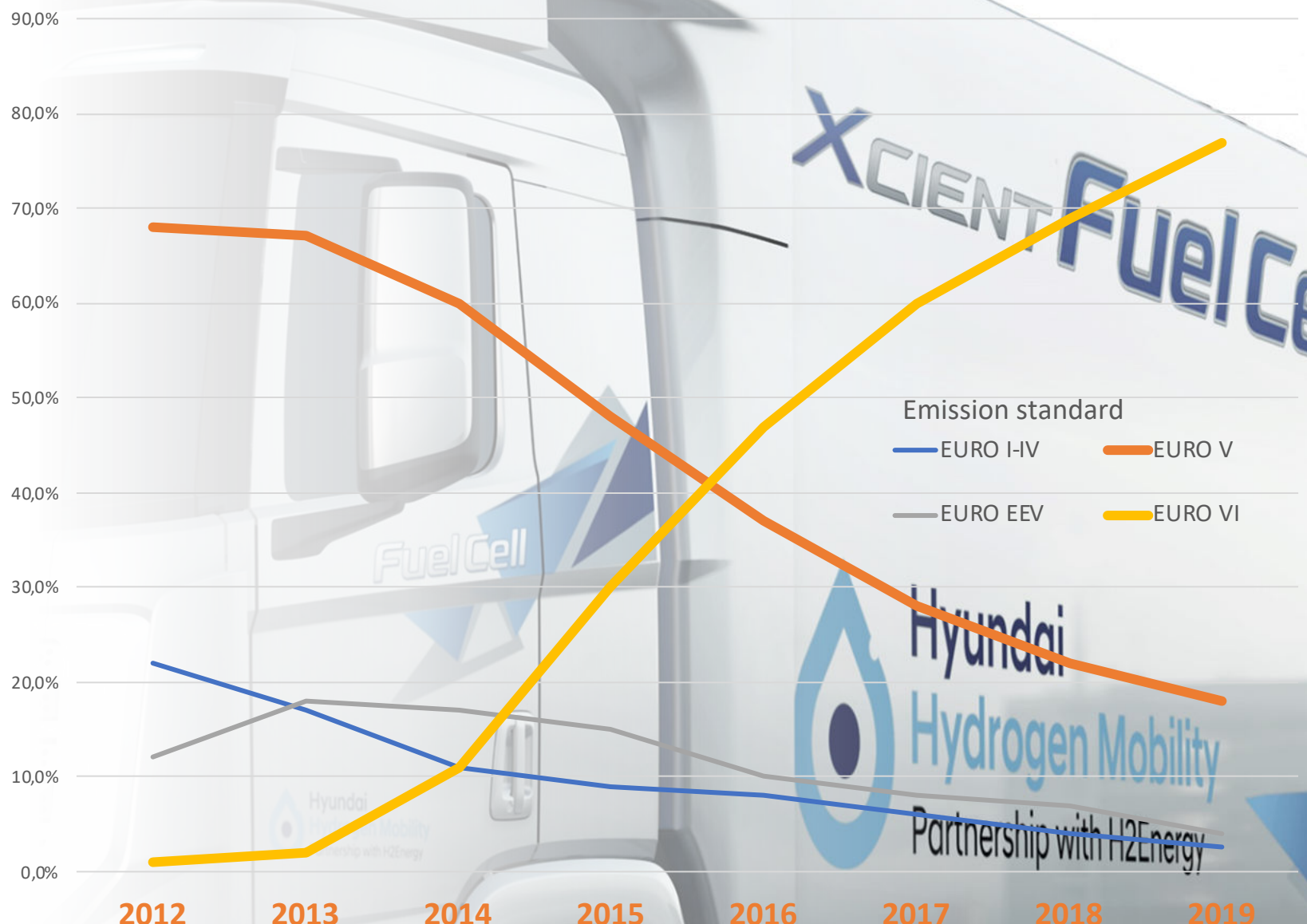
picture: HYUNDAI
Source: Bundesamt für Güterverkehr, Mautstatistik 2019

environment

road

75% of drivetrain technology in trucks route performance changed within only **7 years**

capability of change



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aspects

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aspect

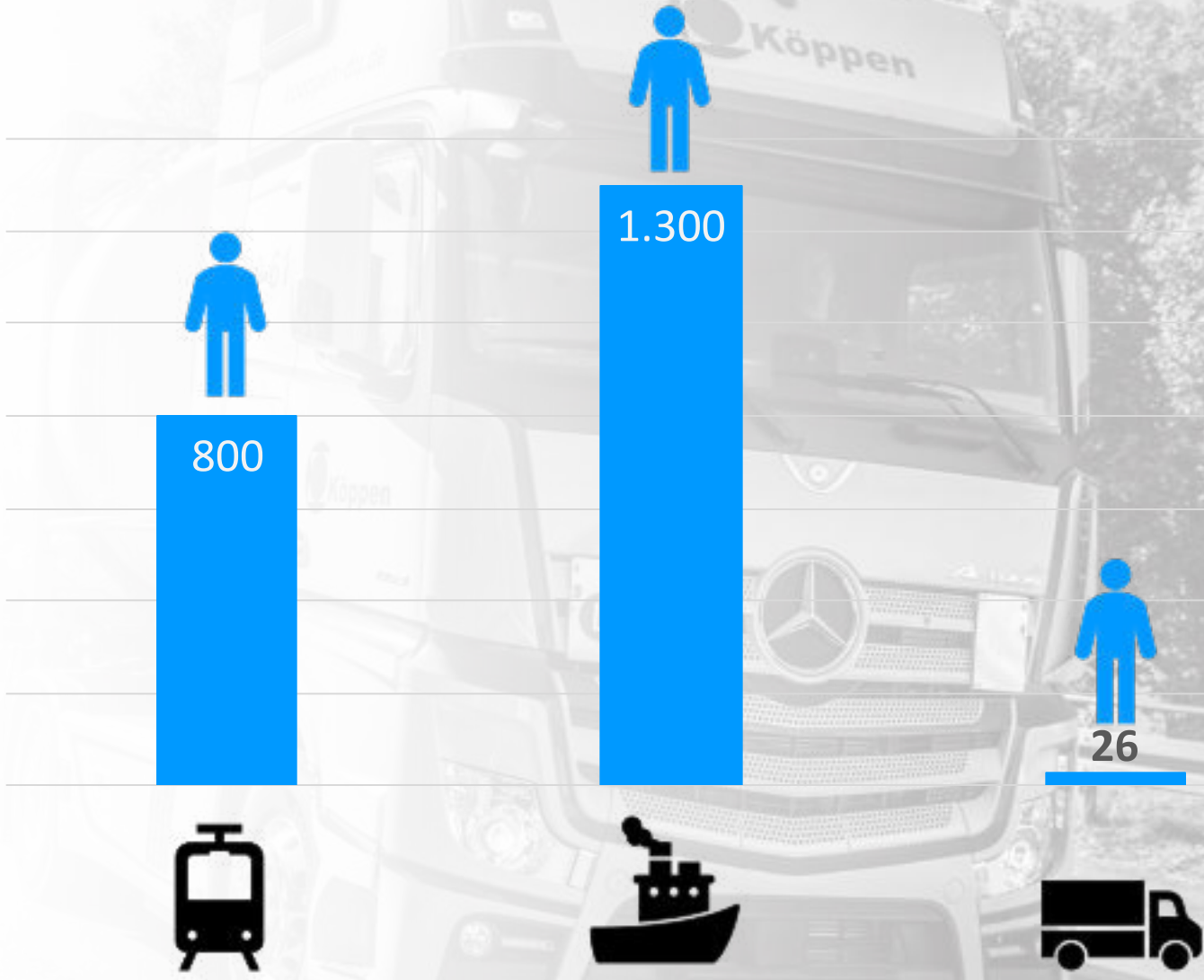
personnel

picture: Köppen GmbH

personnel

disadvantage in efficiency:

t /personnel



Rail: calculated average; source: Forschungs- Informations-System; Mobilität und Verkehr; Stand 31.01.2018

Barge: calculated average capacity per barge; fact and figures; Bundesverband der Deutschen Binnenschifffahrt e.V., 2018/2019

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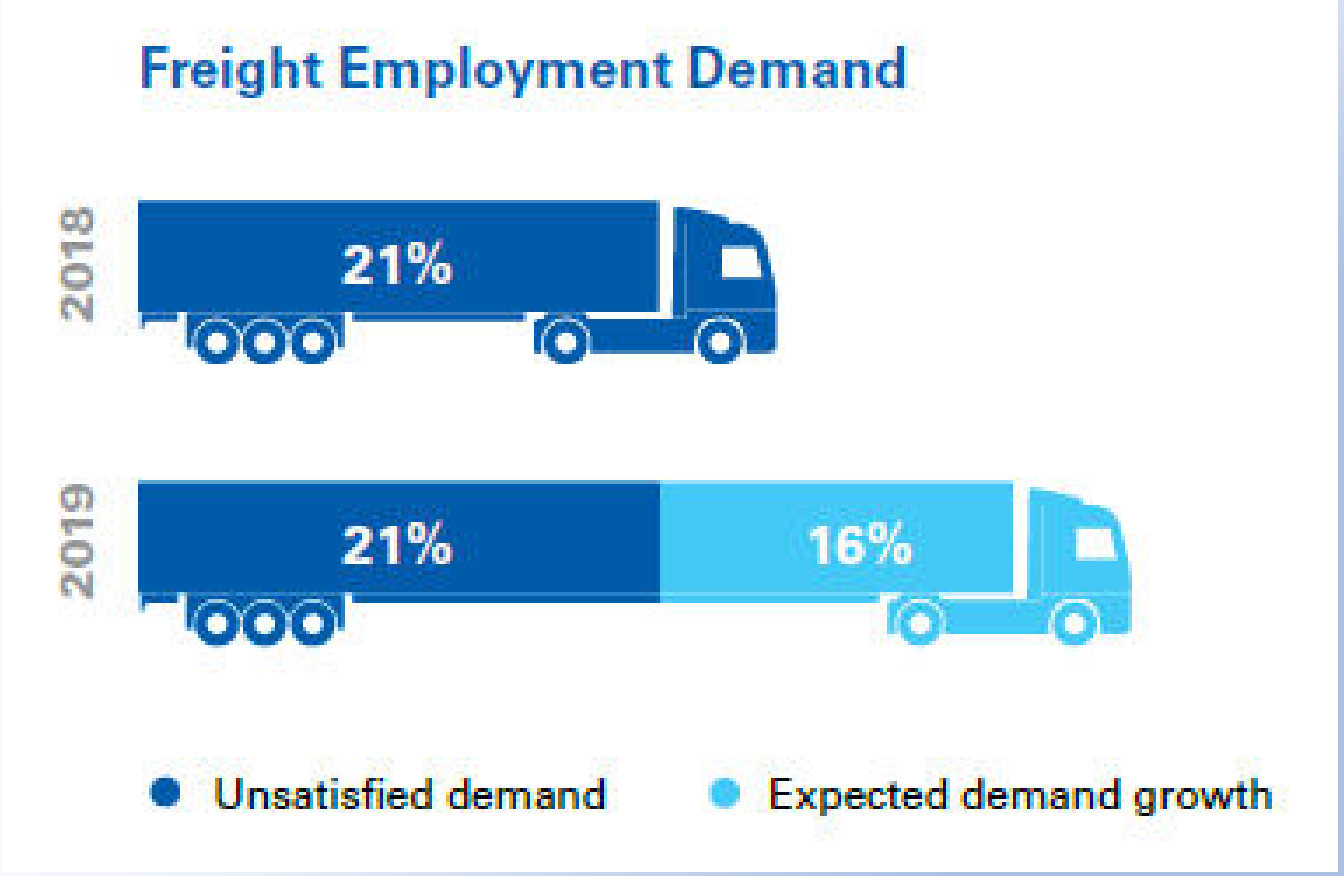
personnel

“the supply of drivers currently meets an employment demand of 79%, leaving a driver shortage of

21%.”

Overall European Freight transport sector on the road.

source: IRU report „Tackling Driver Shortage in Europe, 20.03.2019



Graphik: IRU report „Tackling Driver Shortage in Europe, 20.03.2019

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personnel

“the average age in the German transport sector is over 47. Some

40%

are expected to retire by **2027**, creating a shortfall of around

185.000

bus- and truck drivers only in Germany.

source: IRU report „Tackling Driver Shortage in Europe, 20.03.2019

picture: Köppen GmbH

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aspects

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- personnel ✗

growth in road transport

is **limited** by

the **availability of drivers**

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advise

use drivers for **driving**

not for **waiting**
at counters, on sites or terminals

uncouple road movements
and site operation

think **intermodal**

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