



Impact EMS on intermodal transport

Getting too heavy?

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Set-up of the presentation

- Dutch vision on goods transport
- The shift to co-modality
- The history of EMS in the Netherlands
- EMS and other modes
- Conclusions



Dutch vision on goods transport



- Important Dutch position in European logistics: Port Rotterdam, Schiphol International Airport
- Economy ↗, transport ↗
- We need all transport modes and all infrastructure to facilitate future growth

The shift to co-modality

- The Netherlands: long period of “modal shift” policy (1996-2002)
- Despite strong support and major incentives: minor shift
- 80% of all transport is on distances <100 km
- All modalities towards higher efficiency, not discriminating one

The history of EMS in the Netherlands

- 1992 First letters from hauliers
- 1996: Start wide oriented project group and studies on various topics
- 1999 –2003 First Trial (4 combinations)
- 2004-2006: Second trial (162 combinations)
- 2007: Start experience phase (50 tonnes, no limits in # combinations)



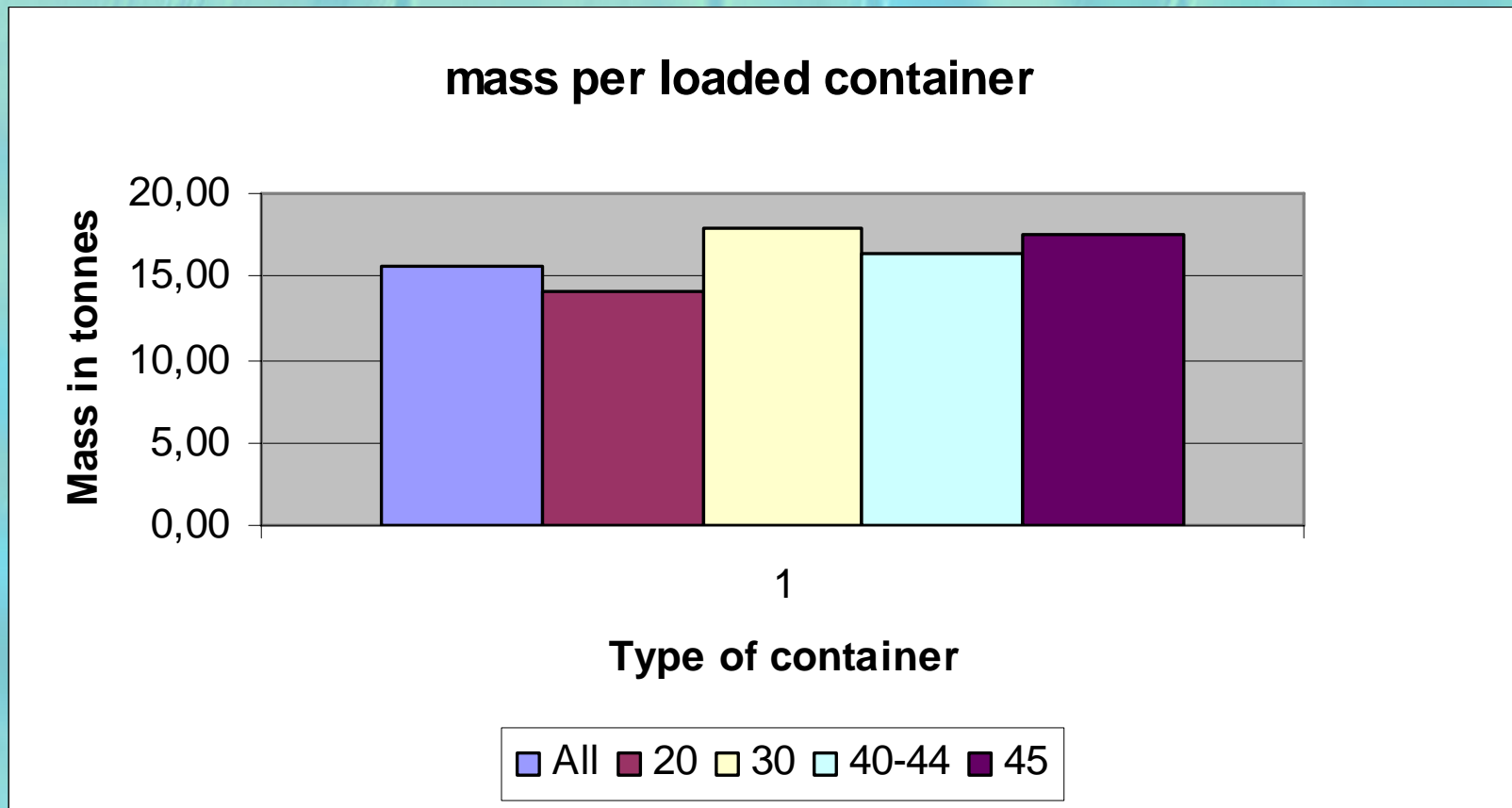
EMS and other modalities

- Studies: influence on rail (< 3%) and inland shipping (<0,5%). International transport : higher, still not significant
- In the 3%: combined transport with other modes (containers);
- Only relatively short distance intermodal transport is interesting market for EMS
- Important: GCW: heavy goods travel often on rail or inland shipping
- Every mode its own captive markets

EMS and payload

- Conflicts: containers: payload important
- Avg mass per m² loading surface in road transport: 300 kg (EMS: 50 m²)
- Average loaded mass: (aug 2004 – nov 2006): 16 ton
- Avg mass EMS in trial: 36 ton
- Payload EMS in NL 60 vs regular at 50 tonnes: 40 vs 35 tonnes
- Payload EMS in EU 60 vs regular at 44 tonnes): 40 vs 29 tonnes

Containers, avg loaded mass (2005) (excluding mass of container itself)



EMS and containers

- Containers: 40': light, 20': heavy
- Loaded mass almost equal, max mass also (30,4 tonnes max)
- Needed payload for avg 3*20': 51 tonnes (GCW: 71 t), for 20'+ 40'': 36 tonnes (GCW: 56 t).
- NL: strong in 20', if >> 40'', more influence on intermodality

Conclusions

- EMS is option for efficient logistics in traditional road transport goods (short distance, light goods)
- EMS will not influence captive markets for other modalities (heavy, bulk, chemicals)
- EMS is only competitor on combined transport on relatively short distance (fraction of business)
- Containers: avg too heavy if GCW < 60 tonnes are allowed
- Max GCW important

Thank you for your attention!



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