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Transport: ECTA's house

// BY PETER MACKAY ON 9 MAR 2023

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Europe's chemical transport sector faces challenges on several fronts, not least finding drivers and the need to adapt to meet emissions reduction targets

Any conversation with an executive involved in road transport in Europe normally moves very swiftly to the increasing difficulty that operators have in attracting and retaining drivers. Not surprisingly, then, when the European Chemical Transport Association (ECTA) gathered its members for its annual meeting and conference in Düsseldorf this past November, the driver shortage was high on the agenda. ECTA did not have too much trouble attracting attendees, who numbered around 120, and the one-day event always generates interesting discussion.

ECTA has already been active in working on the driver shortage issue and, as ECTA president Andreas Zink explained, one of its first tasks was to talk to its members' drivers to see what they think is discouraging others from joining the profession. Out of a survey of some 5,000 drivers, it emerged that excessive waiting times and loading/unloading sites is a major headache, with more than 80 per cent of those polled citing this as one factor that makes their job unattractive. Indeed, more than 30 per cent of chemical shipments result in the driver waiting for more than three hours; the average time spent on site is 160 minutes. Best practice should be for the gate-to-gate time to be no more than 60 minutes but, ECTA reckons, 120 minutes seems a more achievable level, at least in the near term.

In response, ECTA established a work group in June 2022 with the aim of improving daily work flows for drivers, giving them a voice through a new reporting app and, ultimately, improving the attractiveness of the driving profession in the long term. The work group is charged with resolving the problem described thus: the shortage of chemical truck has passed a threshold level and it is now a real challenge for industry to move chemicals across Europe by road. "Both shippers and transport partners will urgently need to adjust to this new reality whereby the availability of truck drivers remains limited," ECTA says. "Moreover, all stakeholders will need to rethink their operational processes and how to organise logistics by improving the utilisation and productivity of chemical drivers."

MAKE IT BETTER

Some facility operators have already starting looking at how they can improve the experience for drivers calling at their plants. Bruno de Clerck, transportation and fleet supervisor at Chevron Phillips Chemical (CPCChem) in Belgium, with the assistance of Luc Haesaerts of Haesaerts Intermodal and one of the members of the ECTA work group, explained how the company is approaching the issue.

Transport is a fundamental element of CPCChem's operation and it applies the same safety demands on the transport sector as it does on the production, use and disposal of its output. Similarly, transport is held up to the same levels of accountability and social

responsibility as all other activities.

De Clerck explained the driver's experience on arrival at the CPChem site, which has been streamlined through the use of digitalised systems to speed passage from the gate to the drivers' area – all loading and unloading operations now being carried out by CPChem personnel. Through the use of 'drop and swap' operations and additional investment in in-plant vehicles, CPChem has succeeded in shortening gate-to-gate times and has also improved facilities for drivers while they are waiting.

Driver training has been prioritised, with dedicated training days giving the opportunity for drivers to get hands-on experience of CPChem equipment and learn about the company's procedures for loading product. There is also a dedicated CPChem training vehicle available for both the company's own personnel and those of carriers and fire departments. CPChem has now held two annual 'day of the driver' events, where it has handed out appreciation packages at both its production sites in Belgium.

All this activity, de Clerck said, aims to revalue the profession of the chemical truck driver and create environments where drivers feel appreciated. But CPChem cannot do it alone and he called for an industry-wide effort involving not only chemical producers and carriers but also the customers for those chemical products.

PICK IT UP, PLUG IT IN

Another way to resolve the driver shortage problem is to reduce the demand for drivers by moving shipments onto the rail network. Ralf-Charley Schultze, president of the International Union for Road-Rail Combined Transport (UIRR), pointed out that the combined transport concept is already able to resolve the problem while also deliver the EU's 'Fit for 55' carbon reduction objectives. Indeed, he said, combined transport is currently the only proven, industrial-scale solution that delivers zero-carbon and energy efficiency at the same time. For end-to-end decarbonisation, it needs a reliable supply of renewable electricity for traction and terminal operations, and battery-electric transshipment and trucks for first- and last-mile road operations.

Combined transport volumes and tonne-km figures have been rising consistently in Europe, especially over the past ten years. In 2021, UIRR members carried 8 per cent more consignments and increased tonne-km transport by 11 per cent compared to 2020. Last year, however, growth stalled, with additional overland transport from Ukraine putting strain on the system, work-related disruptions and a sharp increase in electricity prices in

some countries. There are ways around these issues, Schultze said, particularly in terms of prioritising railfreight over passenger trains and by improving communication between network operators and train operators.

There are also some regulatory initiatives coming through from the European Commission, expected this year, that should directly or indirectly improve the viability of combined transport as an alternative to road freight.

Schultze's presentation had opened a door onto the other major topic of the ECTA annual meeting, the electrification of road vehicles. Johan Mörck, electric driveline strategy director at Volvo Trucks, pointed out that battery electric vehicles (BEVs) are just part of the solution to meeting the target of reducing CO₂ emissions from transport by 50 per cent by 2030 and that internal combustion engines (either diesel or LNG-powered) will still be needed for heavy haulage vehicles and long-haul operations. BEVs are currently limited to local operations but are already moving into regional distribution, construction and medium-range haulage operations.

Electrification of the truck fleet is proceeding apace, both in Europe and North America, with bigger and more powerful drive trains being rolled out. What is limiting take-up is the availability of charging stations and the time it takes to charge a large vehicle. Initially, at least, private chargers at a vehicle's 'home' base allow overnight charging at slow speeds; restricted public chargers are appearing at customer premises, where vehicles can be charged during loading/unloading; public charging points will have to be very fast (350 kW or more) if they are to be useful for the haulage industry. Volvo is forecasting, based on real vehicle movements, the development of shared charging locations for trucks in regional operations in northern Germany and Scandinavia, with the potential for wider development of public charging points. It will use this vision as a first step in providing logistically optimal locations for recharging vehicles.

TAKE IT ONBOARD

Siemens has been looking closely at electrification as well. Hasso Grünjes, head of eHighway at Siemens Mobility, shared his company's assessment of the current situation and how it might develop. For a start, journeys of 500 km or more are almost entirely (at least 80 per cent) by motorway. BEVs are feasible for daily mileage of up to 500 km; after that, fuel cell electric vehicles (FCEVs), which generate their own electricity onboard, are suitable for daily mileages of up to 1,000 km. Beyond that, the haulage industry will need to rely on internal combustion engines running on renewable fuels.

If the EU's emissions reduction goals are to be met, Grünjes said, at least 70 per cent of new truck sales in 2030 will need to be zero-emission vehicles. That target will only be met if sufficient infrastructure to power these vehicles can be put in place by then. Currently, Siemens says, overhead contact lines offer the most mature technical solution for long-haul heavy road freight, though e-fuel production is now coming onstream. It will be next year before the planned standardisation of high-speed chargers for BEVs can be completed and the start of serial production of FCEVs is not expected before 2027.

In light of that, Germany's Federal Ministry of Transport has recommended that some 4,000 km of highway – the core network – be equipped with overhead cables by 2030. Other countries in Europe are also looking favourably at the concept, with Spain finding that the cost of overhead catenary power supply could be lower than traditional fuels as early as 2025.

Overhead power supply avoids the need for trucks to hang around while they are charged but the same can be said for fuel cells. Daniel Keller, COO of Hyundai Hydrogen Mobility, was at the ECTA meeting to give an idea of how the company expects use of FCEVs to develop and was a lot more bullish on the prospects than Grünjes had been.

To achieve a range of 400 km, Keller said, a BEV would need a 1.5-hour charge using a 500 kWh charger; the equivalent FCEV can be fuelled in less than 15 minutes. The key to accelerating acceptance of hydrogen FCEVs is the availability of hydrogen; while progress is being made, it varies significantly in different regions of Europe. But, as the market expands, prices will fall and more investment will be made in the distribution infrastructure. Hyundai already has a 36-tonne vehicle available for the distribution of light goods and has a 42-tonne high payload version for the EU market ready to roll.

The drawback for the chemical industry at present is that none of these alternative drive vehicles is approved for the carriage of ADR goods; that is changing, at least for AT vehicles, and the regulators are hurrying to push through the necessary amendments that will allow electric and hybrid drive trains for all dangerous goods.

The impressive thing about all these presentations at the ECTA annual meeting last year was that, just a few years ago, these concepts did not exist; the pace at which the haulage industry is evolving to address the coming decarbonisation challenges is impressive. It is to be hoped that there are going to be enough drivers around to make it all work.

This year's ECTA annual meeting will take place once again in Düsseldorf and is scheduled for 16 November; more details will be provided soon on the association's website, ecta.com (<https://ecta.com/>).

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