Federale Overheidsdienst Mobiliteit en Vervoer

Belgian Federal Ministry of Transport and Mobility
Transport Trends in Europe
The Experience of Belgium

Presentation for:

UNECE WP. 5 Transport Trends and Economics

September 9, 2008
Transport Trends in Europe

The Experience of Belgium

- Geographical situation
  - Western Europe: between The Netherlands, Germany, Luxembourg, France and the Northsea
  - Close to the UK
- Area: 30.501 km²
- Population: 10.6 mio
- The Belgian transport sector stands for 205.000 jobs.
Mobility of persons - trends

• Motorisation degree: 5.3 mio cars for 10.6 mio inhabitants*,
• 300,000 motorcycles, unknown number of two-wheeled motorised vehicles;
• Road network: dense, excellent and (still) tollfree
• Rail road network: densest in the world
• Public transport: growing
Persistant growth of passenger traffic

• **weaker polarisation of built up areas**: growing sub-urbanization, development of the service sector, combined with dissimination of shopping and industrial areas

• **higher living standard and more leisure time** of households

• **fiscal legislation** which has until now remained fairly favourable towards the acquisition of company cars and fuel bonuses

• **development of Brussels** as the national capital and seat of the European institutions, generating commuter traffic

• **growing complexity of mobility trips**

• high degree of **car ownership**: 1 in 2 Belgians
Example: Modal split for workers
Length of the Belgian road network

• in km at January 1\textsuperscript{st} 2007:

<table>
<thead>
<tr>
<th></th>
<th>Motorways</th>
<th>Regional roads</th>
<th>Local roads</th>
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<tr>
<td></td>
<td>1.763</td>
<td>14.000</td>
<td>137.400</td>
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Mobility of persons – PUBLIC TRANSPORT
Mobility of persons - trends

Choice for a more sustainable modal split

Further examples:

• Fiscal encouragement:
  - of purchase of cars with low carbon emission or sootfilter
  - for employers that invest in more sustainable mobility for their workers

• However, there remains some lack of coherence in the (timid) policies of the authorities
Mobility of persons - Aviation: passenger traffic is up, but for how long?

- **Brussels National Airport:**
  
  2007: 17.8 mio passengers, up 7% (=above the European average)

- **Charleroi (BSCA):** 2.5 mio passengers, up 13%!
  New low cost terminal opened in January 2008

- **Other regional airports:** number of passengers remained stable in 2007.
Transportation of goods echoes the economy

- Globalisation = supply chain management strategies increasingly critical
- European distribution market has continued to expand in response to international needs
- Due to its location Belgium is at the heart of a number of important supply chains
General trend 2000-2007
= growth in all modes and hubs

- Road haulage
- Maritime transport/ports
- Transport by barge
  - over inland waterways
  - to inland ports & waterbound (multimodal) hubs
- Rail cargo (many new initiatives due to European liberalisation, but only modest growth up to now)
- Air cargo
Excellent infrastructure; well integrated in the European networks

Not only an elaborate **road network**, but also:

- The world’s densest **rail network**
- Extended network of **inland waterways**
- **4 ports with maritime access**: Antwerp, Zeebrugge, Ghent, Ostend
- A range of **inland waterways, ports and waterbound inland terminals**
SCHEMATISCHE VOORSTELLING
VAN HET GEMIDDELDE DAGELIJKSE VERKEER (6h - 22h) IN 2006

- Autosnelwegen
- Gem. dagintensiteit 6-22h (som van beide rijrichtingen)
- Andere genummerde wegen (gewest- of provinciewegen)

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<thead>
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<th>Category</th>
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<td>&lt; 10000</td>
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<td>10000-25000</td>
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<td>25000-50000</td>
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<td>&gt; 50000</td>
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Railway-network
Destinations in NW Europe of goods arriving in the port of Antwerp
The European “Blue Whale”: a new species?
Belgium in the belly of the “Blue whale”

Source: Cushman & Wakefield
The shadow of the Eastern European Eagle
Belgian ports: gates to the European markets

- 4 ports with maritime access: Antwerp, Zeebrugge, Ghent and Ostend
- A range of inland ports and 15 waterbound inland terminals: “Extended gateways”
- Fast growth over the last 10 years
The port of Antwerp in 2007

- Turnover: 183 mio tonnes, up 9.3%
- TEU: 8.2 mio, up 17%
- Roro-traffic: 4.4 mio tonnes, up 14.4 %
- Number of seagoing ships calling: 16.689 (15.770 in 2006)
- Gross register tonnage: 288.8 mio, up 8.9%
Port of Zeebrugge (Bruges) in 2007

- Turnover: 43.3 mio tonnes, up 7.3%
- TEU: 2 mio, up 25%(!)
- Roro-traffic: 13(!) mio tonnes, up 6.5%
- Liquid bulk: 5.8 mio, (temporarily) down 7.2%
The modal split in inland transport of commodities

- Road haulage: 75%
- Rail cargo: 11%
- Inland navigation: 14%

(transport by pipelines and air cargo excluded)
Road haulage

Modal share of 75% rather high ( - 4% since 1999) (due to increased share of mainly inland waterways)

Tonnes/km  2006: 48.5 billion, up 14.3% since 1999

Tonnes/km of *transit traffic* 2006: 8.1 billion, up 192% (!) since 1999
Rail cargo

- Despite EU-imposed liberalisation 90% still in the hands of the historic carrier: B-Cargo (turnover: consolidation at best: 8.1 billion tonnes/km; commercial results: return to profitability)

- 10% in the hands of dynamic newcomers of which Dillen & Lejeune has 9%

- Several interesting new (international) initiatives, especially in the hinterland of the ports
Intermodal transport

- General trend: positive
- Some modest state subsidies = some growth
- Initiatives international private operators: non-transalpine transport up 21.9 %! in 2007
- Boosted by strong growth in the ports of Rotterdam, Antwerp and Zeebrugge
- Interface air cargo/HST coming
Inland navigation

• Significant modal share of 14%
• Fastest growing transport modus in Belgium: up 50% since 1999 in tonnes and up 39% in tonnes/km
• Turnover 2006: 166.4 mio tonnes on a total for inland transport of 713.5 mio tonnes
• Serious new investments in waterways, quays and vessels by public and private sectors alike
Example: Port of Liège (Trilogiport)

• 3th European inland port after Duisburg and Paris
• Port: 15.79 Mio tonnes of cargo transited through the port in 2007, up 9.54 %
• Multimodal hub Trilogiport: record total cargo volume of 21.24 Mio tonnes, up 6%
Air cargo

- Steady growth in 2007 (above European average)
- Brussels Airport (nr 6 in Europe):
  - 783,727 tonnes, up 8.9%: top 5 of European cargo airports (proximity of the “pharma valley”)
  - The full-freight market accounts for 310,000 tonnes (+14%), courier services for 381,000 tons (+2%) and passenger flights (belly load) for 92,000 tons (+25%).
- Liège –Bierset: 490,000 tonnes, up 24%
OBSTACLES TO THE DEVELOPMENT OF TRANSPORT

- Environmental pressure, up to climate change
- Energy shortage / cost of fuel
- Living conditions and health, but also: NIMBY
- Split-up of political responsibilities leading to lack of coherence
- Unfinished liberalisation at EU-level
- Exiguity of the territory, combined with density of population and decades of sub-urbanization
Obstacles to further growth of motorised traffic in general

- Cost of fuel
- Congestion
- Environmental pressure & Climate threat
  - Air pollution: Toxic emissions +PM
  - Noise and “lack of viability” of built up areas
  - Kyoto engagements of Belgium
- Road security
- Exiguity of the territory (no room for massive expansion of the road network)
Obstacles to growth of road haulage

All the previous, but especially:

• Congestion around Antwerp and Brussels
• Fierce competition from Eastern European countries
• Shortage of wheels and truckers = turnaround to logistics
• Growth of transit traffic on toll free Belgian motorways
Obstacles to the growth of rail traffic

- Bottlenecks and shortage of tracks
- Lack of reliability of rail cargo system
- Lack of interoperability of personnel and infrastructure in international traffic
- Problematic reopening of the Iron Rhine railroad to the German Ruhr
Obstacles to the growth of inland navigation

• Severe competition and low profitability
• Need of professionalisation
• & capital investment: renewal of the fleet urgent
• NIMBY-syndrome
Obstacles to the growth of maritime ports

- EU-habitat and birds directives + NIMBY
- Tensions with the Netherlands over the dredging of the river Scheldt (Scaldia)
- Risk for port congestion
- Administrative burdens for SSS
- Impaired interoperability of maritime and inland containers (obstacle to co-modality)
Aviation: obstacles to further growth

- Environmental pressure:
  - Air pollution: Toxic emissions +PM
  - Noise
  - Viability of built up areas in the vicinity of airports

- Climate threat (Kyoto engagements of Belgium)

- Exiguity of the territory: no room for the massive expansion of airports
Best practices in transport regulation and infrastructure

• Option for sustainable transport: EU, Belgium, Regions, local authorities
• Regulatory framework
• Upgrading of infrastructure
• Filling in of missing links
Best practices: improvement of transport infrastructure

- Filling in of missing links
- ITS “Easyway”-project
- Trans-European Network: 3 railroad projects on Belgian territory
- Suburban railroad project around Brussels
- Multi-modal hubs (hub-and-spoke around the ports)
Best practices: technological progress and information needs

- Intelligent transport systems
- Progress in the GALILEO-satellite navigation programme
- Homogenous international statistics on transport and mobility
Trends 2008 – all transport modes

• Growth continues during the 1st semester 2008
• Only sign of weakening: - 2% flights at Brussels airport in July
Trends 2008 on the road in Belgium

QUID the 3 F-crisis? +80,000 cars!

• slight drop in the sale of fuel for cars in 2005/06
• Somewhat more km, with less consuming cars
• No drop in the sale of heavy fuel for trucks due to diesel–shopping by trucks from neighbouring countries
• But: Public transport continues its growth!
Projections of transport until 2030
(Federal Planning Bureau 2008)

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<th>Principaux résultats des perspectives du transport en Belgique à politique inchangée (scenario de référence)</th>
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<tr>
<td>Transport de marchandises (en milliards de tonnes-kilomètres)</td>
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<tr>
<td>Rail</td>
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<td>Navigation intérieure</td>
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<tr>
<td>Transport de personnes (en milliards de passagers-kilomètres)</td>
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<tr>
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<tr>
<td>Bus, tram, métro</td>
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<tr>
<td>Non motorisé</td>
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<tr>
<td>Total</td>
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</table>

NB : un passager-kilomètre est un kilomètre parcouru par un passager ; une tonne-kilomètre est un kilomètre parcouru par une tonne de marchandise.
Thank you for your kind attention

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Belgian Federal Ministry of Transport and Mobility