

**Summary of the report “Nieuwe wijn in oude zakken”  
Pleidooi van Transport en Logistiek Nederland voor meer ruimte voor het vracht-  
verkeer om de groei van de nieuwe economie op te vangen**

**Translated title and subtitle: “New wine in old bottles”**

**Argument by Transport en Logistiek Nederland in favour of more space for road haulage to accommodate the growth of the new economy.**

**E-commerce creates extra growth in road haulage**

Electronic commerce is growing fast. It has a strong impact on all parties in economy. The traditional way of trading between consumer, business, producer, wholesaler and retailer is changing fundamentally. E-commerce can be divided into different segments, of which business-to-consumer (B2C) and business-to-business (B2B) are the most important ones. B2C is the consumer segment: the consumer buys electronically in e-shops. In the B2B segment, the focus is on electronic trade between companies. Market prospects for e-commerce are high, especially in the USA. Europe lags somewhat behind – due to smaller, national markets – but is catching up quickly, in particular because it is ahead in pc penetration and mobile telecommunication. The Netherlands will remain a modest e-commerce market, partly because the Dutch consumers have reservations towards buying through the internet.

E-commerce is one of the pillars of the “new economy”, the network-economy of which information, communication and technology are the mainstay. As in the “old economy”, transport and logistics play a very important role: a product ordered through the internet still has to be delivered physically to the person ordering the goods. And this process has to be faster than in the past and the customer has to be able to monitor the status of his order. Logistic activities form an important part of this total process of executing the order (e-fulfillment). Its execution is vital in any successful e-commerce strategy.

**B2C-segment causes an 8 percent increase in road journeys.**

In the B2C-segment three developments occur that are relevant for road haulage companies: due to the fact that some physical products can now be downloaded, the demand for transport decreases. On the other hand, products are bought through the internet that otherwise would not have been bought in the Netherlands, creating a transport flow. But the most important development is the shifting of transportation flows, as products are bought in e-shops and not only in traditional brick-and-mortar-shops. There are several reasons for this development, of which convenience, price differences and a wider selection are the most important. Hence, products should be delivered to the consumers homes, and not to the shops. This fine distribution of relatively small orders has its own requirements and will be carried out with smaller trucks and vans. Consumers order food and non-food products. These products account for approximately 22,5 percent of the total flow of goods transported by for-hire-and-reward transportation companies. Ultimately, about 3.5 million tons of goods will be sold through e-shops in 2005. In this prognosis the characteristics of the transportation statistics are taken into account and it is assumed that the consumer will buy 15 % of non-food products and 10 % of food products through e-shops in 2005. In extensive analysis, the effect of delivering the goods to the consumer using smaller vans instead of larger distribution trucks that deliver to the shops, is calculated. This leads to an increase of 8 percent in road journeys. These additional road journeys are completed on smaller, secondary and municipal roads.

**B2B segment creates 9 percent extra growth in road journeys.**

The B2B-segment will also create extra growth. Smaller and medium sized Dutch companies will provide an enormous stimulus by using the internet for placing orders. Virtual market-places, where supply and demand are matched electronically, are becoming increasingly important. Finally, current use of EDI plays a role, as it is a part of B2B. Our conclusion is

that due to B2B, transportation flows will shift, they will become less predictable, orders will be smaller in size, but will be placed more frequently and certain sections of the distribution chain will disappear. This will result in an extra growth in road journeys of about 9 percent.

**Old economy creates 21 percent increase in road journeys**

In all the projections for e-commerce – an element of the “new economy” – we cannot leave out the “old economy”, which has experienced strong growth in the Netherlands for the past few years. This growth is expected to continue. In the past, the relationship between economic growth and growth in road transport has been established. This implies that until 2005, the economic growth will cause an autonomous increase in road journeys of 21 percent. The reason for this development lies in the fact that the traditional distribution system of the “old economy” will continue to exist alongside the distribution system of the “new economy”. The possible shift towards other modes of transportation (modal shift) has been taken into account.

**Concrete measures are necessary, because problems occur with deliveries**

We anticipate that the number of road journeys up to the year 2005 will grow steadily: a total increase of 38 percent. These journeys must be carried out on a road network that is presently becoming increasingly congested. Apart from calamities, the extensive use of passenger cars causes congestion and traffic jams on a road network that is already inadequate. Passenger road traffic accounts for about 82 percent of all vehicle-kilometers. A growth of at least 10 percent is expected until 2005 and a growth of 50 percent until 2020. Government initiatives towards better accessibility are not far-reaching enough for the Dutch road haulage companies to safeguard adequate and timely delivery of goods to shops, distribution centers and individual consumers. Therefore Transport and Logistiek Nederland proposes concrete measures. The starting point would be a distinction – which is far more pronounced than is currently the case – between government policy on passenger traffic, and policy on road haulage. Specific measures generate better results than generic measures. Therefore accessibility measures for specific target groups are proposed (see table).

**Effective accessibility measures for specific target groups**

Road haulage	Passenger traffic
Dynamic target group lanes on highways e.g. special lanes for trucks	Road pricing
Extended night distribution facilities	Corporate traffic management
Optimizing and coordination of time blocks that city centers are accessible to trucks	Improvements in public transportation /modal shift
Dynamic overtaking interdictions	Harmonization of speed on highways / keep your lane
Longer trucks (“ecocombi’s”)	Carpooling and dedicated “stations” to switch from car to public transportation (so called transferia)
Exclusive entry- and exit lanes to and from industrial parks	Municipal parking policies
Collaborative use of bus lanes	Policies towards biking / modal shift

Only after these measures have been implemented – and only then – will the Dutch transportation and logistics sector be able to continue playing its key role from the “old economy” in the “new economy” and implement the required growth of 38 per cent in road journeys in 2005.

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Transport en Logistiek Nederland, with its more than 7.000 members, is the trade association representing the interests of the Dutch professional road haulage industry.

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