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Large goods vehicles to double performance in next 20 years Shell presents first Goods Vehicle Study for Germany

Despite the financial and economic crisis, road goods transport in Germany will continue to increase. In the mid-term future, goods transport will grow to more than one billion tonne-kilometres per annum, and large goods vehicles will double their performance. Increasing mileage will lead to an increase in the carbon footprint of this sector. Goods vehicles will operate with improved diesel technology in 2030.

These are the results of the first Shell Goods Vehicle Study, presented in Berlin by Shell in cooperation with the Institute of Transport Research of the German Aerospace Centre (DLR) under the heading "Facts, trends and perspectives in road goods transport up to 2030".

"Passenger cars do about 85% of the total mileage on the roads today; they consume about two thirds of total fuel, and their carbon emissions are likewise about two thirds of total CO_2 emissions from road traffic. But the importance of goods vehicles will increase in the coming years. That is why, for the first time, Shell has now produced a study on goods vehicles," said Dr. Jörg Adolf, scenario expert and Chief Economist at Shell Germany. Last year Shell presented the 25th edition of the Shell passenger car scenarios on the subject of sustainable auto-mobility.

The volume of goods transport in Germany today is 4 billion tonnes (2008), with a total of 670 billion tonne-kilometres per annum. Road transport accounts for 69.2% of that. The total will rise to more than 1,000 billion tonne-kilometres by 2030. "Large goods vehicles in particular will increase their transport performance rapidly, almost doubling it by 2030," explained Andreas Lischke scientific project manager at DLR.

Germany is Europe's biggest goods vehicle market, with a share of about a quarter of new registrations of large goods vehicles and semi-trailer trucks of more than 3.5 tonnes. The total fleet of goods vehicles in Germany has increased by about two thirds since 1990, from about 1.5 million to over 2.5 million units. The most dynamic growth has been in the categories of light commercial vehicles and semi-trailer trucks. The figure will rise to three million by 2030.

Road goods transport, especially long-haul transport, will become cleaner; but the fleet of light commercial vehicles will be modernised only slowly. More sophisticated exhaust gas cleaning technology has made goods vehicles more expensive and increased their energy consumption in recent years.

Diesel engines are the dominant propulsion system for goods vehicles. They account for 93% of the total fleet, and for 99% in the heavier category of goods vehicles.

Shell Deutschland Oil GmbH
22284 Hamburg
Internet http://www.shell.de

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The efficiency of new goods vehicles will improve by 20 to 30% in the next 20 years, depending on vehicle category. Large goods vehicles in 2030 are expected to use further improved diesel technology, and depending on their area of operations they will combine hybrid technology, sustainable biofuels and optimised vehicle technology.

Road goods transport accounts for about 5% of total carbon emissions today. The new study assesses energy consumption and carbon footprint of road goods transport up to 2030 in two technology scenarios – a Trend Scenario and a more ambitious Alternative Scenario.

In the Trend Scenario, carbon emissions will increase by 50%, mainly due to increasing mileage and tonne-kilometres, and in the Alternative Scenario they will increase by 32%. The CO_2 emissions of all motorised road transport (passenger vehicles and goods vehicles) will remain largely stable up to 2030 in the Trend Scenario. They will be reduced by 17% in the Alternative Scenario, due to technological improvements in goods vehicles, and also due to significantly more sustainable passenger car mobility.

Pressekontakt:

Shell Deutschland Oil GmbH
Cornelia Wolber
Telefon: +494063245290
Email: Shellpresse@shell.com
http://www.shell.de/lkwstudie