

## FREIGHT TRANSPORT

## TRANS 2

The transport of goods from production or storage sites to places of consumption is a key stage in economic activity. However, it causes various pressures on the environment (specific energy consumption, emissions of air pollutants, etc.)<sup>1</sup> and human health (noise<sup>2</sup>, etc.), the intensity of which depends on the level of economic activity or land use, but also on the mode of transport used.

## The predominance of road transport

Road transport is the primary method of freight transport<sup>3</sup> in Wallonia and its modal share has increased at the expense of rail transport. As such, between 1990 and 2009<sup>4</sup>, the modal share of road transport increased from 66% to 84%, while that of rail transport fell from 27% to 10%. The modal share of inland waterway transport remained stable (6% to 7%). The importance of road transport is explained in particular by its considerable flexibility (accessibility and ease of use), accentuated by the strong growth of the fleet of light commercial vehicles (van), as well as by a very dense infrastructure on the Walloon territory. Air freight has grown considerably in Liège Airport in less than 20 years. With 650 kt transported in 2015 (compared to 7 kt in 1996), this airport is Belgium's leading cargo airport and the 8<sup>th</sup> largest in Europe.

## Impact of the economic crisis

Between 1990 and 2007, total demand for freight transport in Wallonia increased by 87%, twice as much as GDP. This corresponds to a decrease in eco-efficiency in this area<sup>5</sup>. However, from 2008 onwards, the global economic crisis had a major impact on road transport demand, and consequently total demand for freight transport.

## Managing transport demand

Due to its geographical location, Wallonia is a transit area

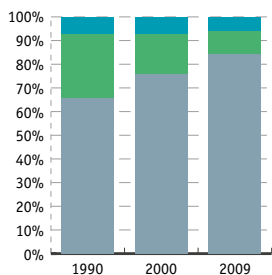
to and from the major seaports of the North Sea, and the industrial and consumer basins surrounding it<sup>6</sup>. This transit is increasing, with the share of foreign lorries on Belgian roads rising from 37% in 1990 to 49% in 2013<sup>7</sup>. The development of the logistics sector<sup>8</sup> is accompanied by measures to support alternatives to road transport, particularly inland waterway transport. As part of the Marshall Plan 4.0 (*Plan Marshall 4.0*), the Government plans to develop existing multimodal platforms, in particular through support to autonomous ports.

## The outlook to 2030

The development of international trade and the increase in the average distances travelled by goods should increase the demand for transport, expressed in t-km, by 41% between 2012 and 2030<sup>9</sup> in Wallonia. Road transport should remain predominant, but the increase in its cost<sup>10</sup>, particularly due to increased congestion on roads, is likely to increase the modal share of rail and waterways, which are more environmentally friendly modes.

<sup>[1]</sup> → TRANS 6 | <sup>[2]</sup> → HEALTH 1, 2, 3 & 4 | <sup>[3]</sup> Transport by road, rail and water, expressed in t-km | <sup>[4]</sup> The latest regional t-km data available for rail is 2009, total demand can no longer be calculated for subsequent years. | <sup>[5]</sup> → Introduction to Part 4 | <sup>[6]</sup> → TRANS 1 | <sup>[7]</sup> FPS Mobility and Transport, 2015 | <sup>[8]</sup> The competitiveness pole "Logistics in Wallonia" is devoted to this issue. | <sup>[9]</sup> FPB & FPS Mobility and Transport, 2015; the reference scenario takes into account the kilometre charge. | <sup>[10]</sup> → TRANS 7

Fig. TRANS 2-1 Modal split of freight transport in Wallonia

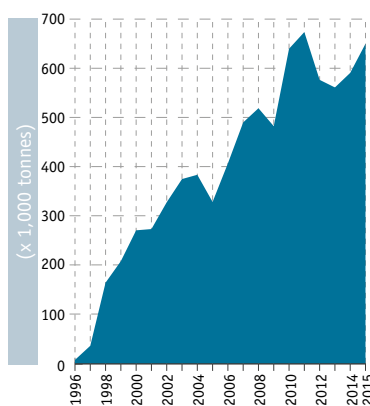


## 2009 values (Bil. t-km)

Inland waterway transport	1.5
Rail transport	2.4
Road transport	20.8

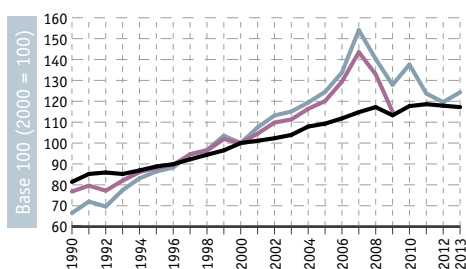
SOERW 2017 – Sources: SPW - DG02; FPS Mobility and Transport; SNCB

Fig. TRANS 2-2 Air transport (Liège Airport)



SOERW 2017 – Source: SPW - DG02

Fig. TRANS 2-3 Demand for freight transport in Wallonia\*



## Values

Road - only trucks cat. C (Bil. t-km) (2013)	20.3
All modes - except air (Bil. t-km) (2009**)	24.8
GDP - excluding price changes (€M) (2013)	78,648

\* International transport included

\*\* Last year available for railway data

SOERW 2017 – Sources: FPS Mobility and Transport; SNCB; SPW - DG02; FPB, BISA, IWEPS, SVR (HERMREG model)