ECFD
European Confederation of Fuel Distributors

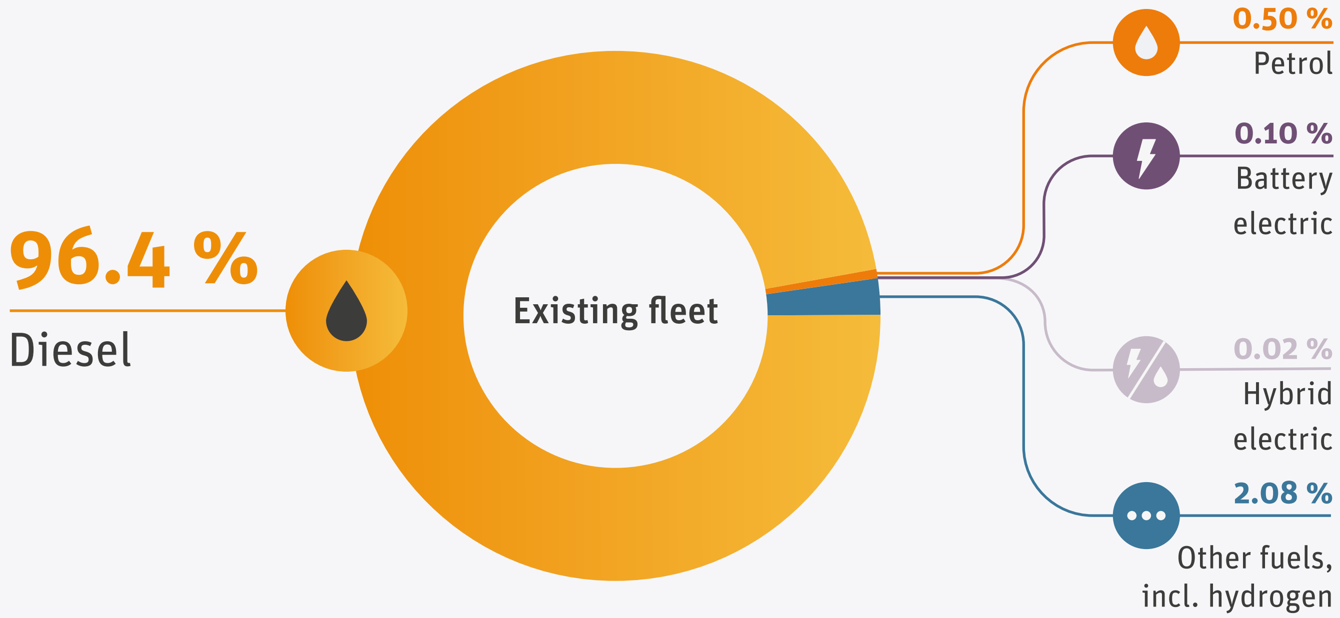
ECFD information

Heavy-duty vehicles in the EU - hardly any alternative charging and refuelling infrastructure available

Heavy-duty commercial vehicles in the EU – alternative charging/ refuelling infrastructure almost non-existent

Only 0.1% of lorries run on electricity

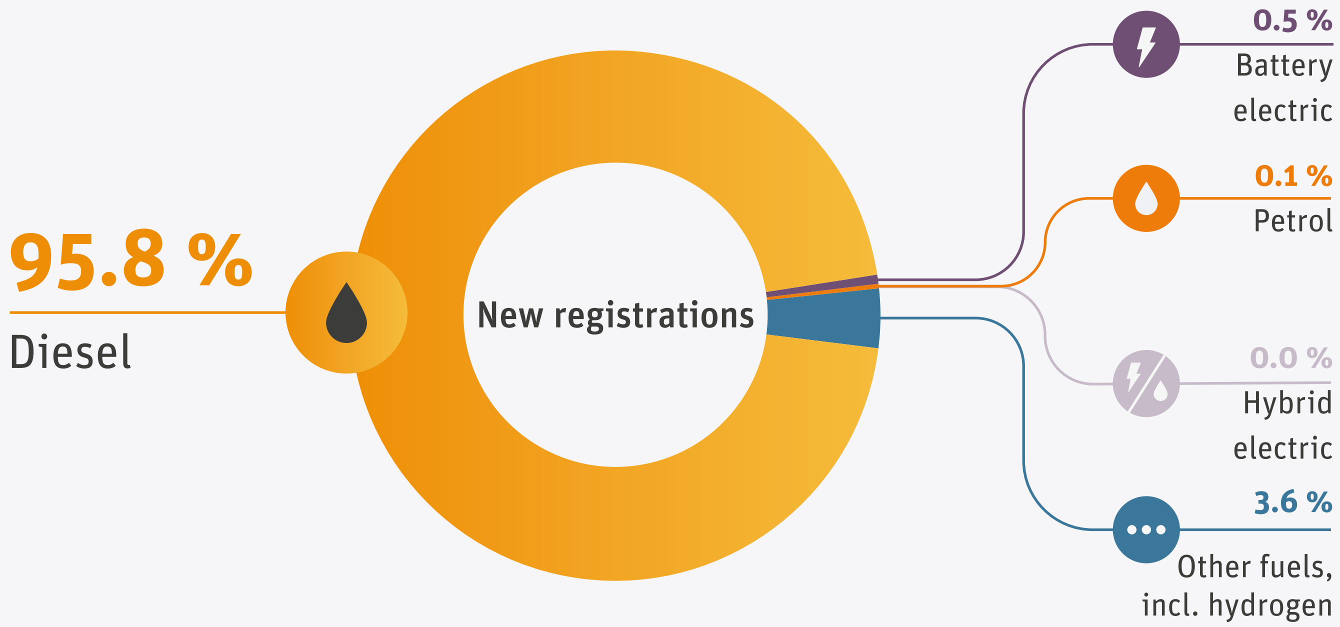
Share of fuel types in the medium- and heavy-duty vehicle fleet (>3.5 t) in the EU in 2021



Diesel also clearly dominates among newly registered vehicles

Share of fuel types among new registrations of medium- and heavy-duty vehicles (>3.5 t) in the EU in 2021

* Lorry charging points are almost non-existent to date. There is no data on the existing charging infrastructure in the EU countries.



Sources: Statista, ACEA, European Commission, FuelsEurope

There are currently hardly any public charging points for trucks

Number of refuelling and charging points in the EU in 2021

Country	Petrol stations	Hydrogen filling stations	Truck charging points (800 kW)*
Belgium	3,121	3	/
Bulgaria	3,531	0	/
Denmark	2,068	6	/
Germany	14,458	89	/
Estonia	491	0	/
Finland	n/a	0	/
France	11,151	19	/
Greece	5,889	0	/
Ireland	1,906	0	/
Italy	21,700	1	/
Croatia	n/a	0	/
Latvia	605	0	/
Lithuania	n/a	0	/
Luxembourg	235	0	/
Netherlands	4,147	7	/
Austria	2,748	4	/
Poland	7,852	0	/
Portugal	3,333	0	/
Romania	2,292	0	/
Sweden	2,678	3	/
Slovakia	1,003	0	/
Slovenia	n/a	0	/
Spain	11,810	3	/
Hungary	2,015	0	/

* Lorry charging points are almost non-existent to date. There is no data on the existing charging infrastructure in the EU countries.

Conclusion:

- **77 percent** of goods transported in the EU in 2021 were transported by road. This corresponds to 1.9 trillion tonne-kilometres. The railway's share of EU-wide freight transport in 2021 was **17%**. The inland waterway transport share accounted for **6%**. Road transport continued to increase: Whilst in 2011 around **74%** of freight transport was transported by road, in 2021 this figure increased to around **77%**. **Road freight transport by truck is thus indispensable** and a guarantor of economic prosperity, growth and employment in Europe.
- **Road freight transport is safely and reliably supplied throughout Europe by a dense, public tank infrastructure network.**
- The development of alternative fuel or charging infrastructures for hydrogen and electricity is currently at a very early stage of development at best. A public **heavy-duty vehicle megawatt charging infrastructure in the EU is not yet statistically detectable**.
- In order to be able to guarantee the smooth movement of goods and thus the safe functioning of the internal market in the future, it is necessary from a climate policy perspective to replace today's fossil-based **fuels with renewable fuels such as HVO and, in the future, e-diesel**. This does not require adaptation of the existing EU-wide refuelling infrastructures or the vehicles.
- **According to experts**, the development targets defined in the revised 2023 **AFIR** (Alternative Fuels Infrastructure Regulation) for the road core network in the EU member states **are insufficient** to guarantee a adequately dense public refuelling and charging network for hydrogen and charging electricity in road freight transport across Europe. Moreover, its development in the very short timeframe envisaged for this (by 2030) is questionable.
- **The construction of a completely new infrastructure is cost-intensive and technically challenging,** for example, the provision of an H_2 or charging power infrastructure, including network construction and upgrading, as well as the production of all necessary components. All these measures cause further CO_2 emissions. In addition, the required amount of green electricity/hydrogen must be made available, which is currently not foreseeable.

Political demand:

To ensure that the EU member states and logistics companies are not overstrained economically and the reliable transport of goods is not jeopardised, the EU should regulate various drivetrain technologies in heavy goods transport. This includes recognising the CO_2 reduction contribution of e-fuels and other renewable fuels within the **EU fleet regulation for heavy-duty vehicles such as trucks, but also for buses.**

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