



SOLVAY
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Driver shortage in the European Chemical Transport

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Edoardo Vanni

EMEA Logistic Purchasing Manager



Drivers Shortage

The entire chemical supply chain at risk

Key numbers

- 2nd most difficult position to fill in Europe (ManpowerGroup 2017)
- Shortfall of drivers in main EU countries today
 - Germany: 45.000
 - France: 17.000
 - Belgium (Flanders only): 1.682
 - Poland: 100.000
 - UK: 35 to 52.000
 - Sweden: 4 to 5.000
 - Denmark: 2.500
 - Norway: 3.000
 - ...

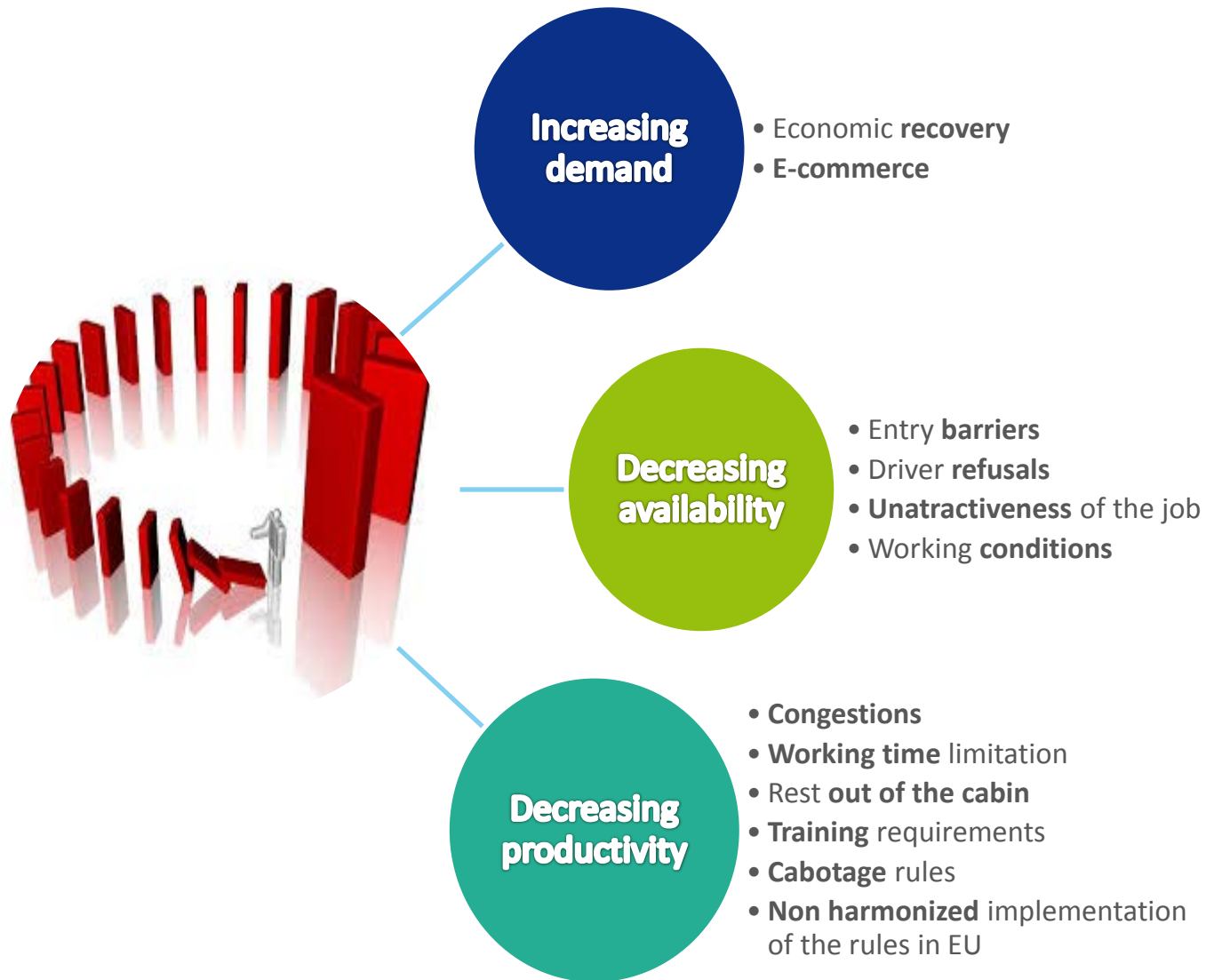
± 217.000

*In 2008 74k drivers were missing
Now 217k!!*

Impact: driver shortage endangers security of supply in the Chemical Industry

- Lower **customer service** (pressure on JIT, possible disruptions, higher inventories)
- **Safety** risks (less qualified drivers for chemical industry)
- Product **quality** risks
- Impact on **multimodality**
- Increased transport **costs**
- Impact on **competitiveness of European chemical industry** and downstream products

Driver shortage: a combination of factors



Working group creation



Working group creation



Attracting new drivers

- Improving job satisfaction
- Removing entry barriers
- Promotion campaign

Improving productivity

- Better use of driver's time
- Harmonizing site requirements
- Harmonizing driver requirements in the chemical industry

2 Workstreams

Drivers Qualification

- For the chemical industry

- Secure supply chain (have sufficient number of drivers)
- More fluid collaboration
- Gate in/out time reduction
- (consequently) less delay from drivers (timeslots)
- Improved relationship with drivers
- Efficiency gains

- For the driver

- Stress reduction when arriving at gate
- Gate in/out time reduction
- Work/life balance
- Less barrier by different content of various sites
- Proud chemical driver



« Qualified » driver



Site Qualification

- Procedures and Best practices

- Cefic/ ECTA guidelines
- SULID



- Productivity improvement

- Address increasing loading times
- Decouple loading from driving
- Timeslots
- Drop & swap & preloading
- Define a basic level of requirements / conditions

- Intermodality



« Qualified » site

What should be done by.....?



Chemical companies

- .treat drivers with due respect
- .improve working conditions
- .better use of driver's time
- .harmonization



Transport companies

- .drivers needs
- .wages
- .career development
- .remove entry barriers
- .better use of driver's time
- .harmonize driver qualification



Transport Associations

- .promote guidelines
- .promote fair remuneration
- .advocate for public and private driver funds
- .promote job opportunities
- .improve image



Cefic

- .promote guidelines
- .harmonization based on safety
- .support ECTA for driver requirements harmonization



Policy

- .European Driver Recruitment Campaign
- .fund driver license
- .support initiatives in driver qualification and trainings
- .develop necessary infrastructure
- .harmonize maximum gross weight

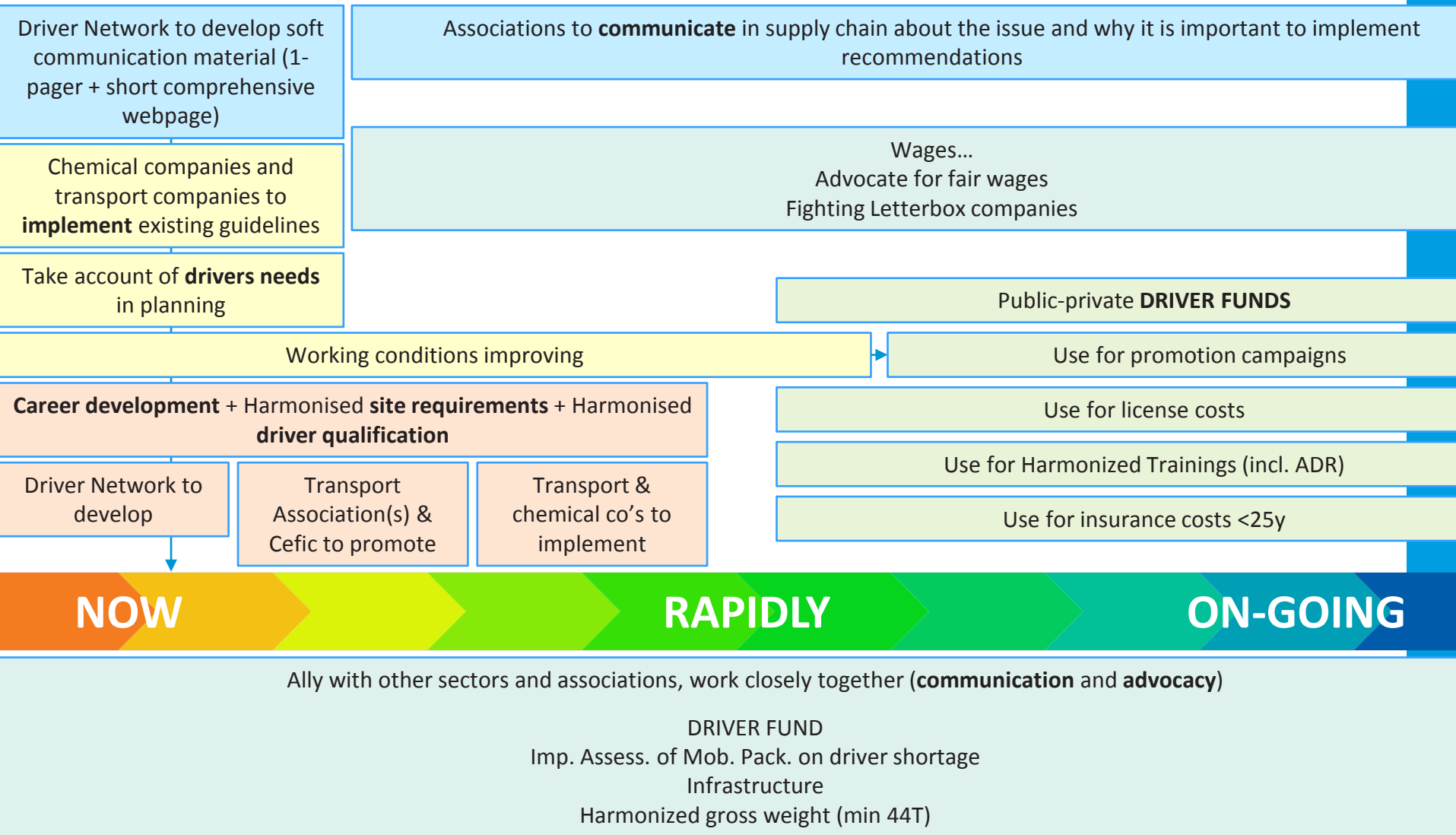


Conclusions

- The driver shortage issue has become more and more acute
- Drivers spend **only 25-50% of their time driving**, a better use of their time is as important as increasing the inflow of new drivers
- Therefore, Cefic and ECTA call ALL stakeholders
 - To make better use of the time of drivers
 - To take **all necessary actions to ensure drivers satisfaction** in their job
 - To promote **job opportunities** in transport sector to unemployed people
 - To work on the **development of common public and private funds** supporting promotion, removal of entry barriers, harmonization & high safety levels
- Continuous **communication** about it by associations is necessary **to foster implementation of recommendations.**

COMMUNICATE – IMPLEMENT – COMMUNICATE – IMPLEMENT – COMMUNICATE

Proposed action plan



Way forward for chemical sector: NEXT STEPS



- With a Working Group

- harmonized site requirements
- harmonized customer-site requirements
- harmonized requirements for chemical drivers
- promotional movie

Deadline

2 weeks prior
SCM meeting

20 September

- Proposed next step

- 1 face-to-face meeting at a chemical site (1 full day), in July
 - Visit & explanation "in the shoes of a driver"
 - Working session
 - connecting site and driver requirements/ filling gaps/ relaxing driver
 - Brainstorming on customer sites

Thank you

