

# Road freight is nearing a tipping point to decarbonise faster than many expect

Shell & Deloitte spoke to 158 global road freight leaders, 70% view decarbonisation as top 3 priority

## The road freight sector today



Key role in global trade

9%

Accounts for approx. 9% of global CO<sub>2</sub> emissions



**Fragmented** - 3 million companies operating 217 million trucks and buses



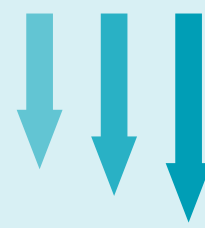
Growth **accelerated** by e-commerce

## Three major barriers identified



**80%**

Complexity of infrastructure replacement



**80%**

Lack of regulatory incentive



**70%**

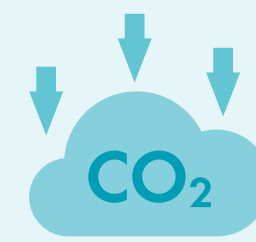
Lack of market and customer demand



## Why is road freight at a tipping point?



**Cities more active** in driving clean air and noise reduction regulations



Businesses focusing on **decarbonising** their supply chain

**We have the two key fuel technologies** - battery electric and hydrogen

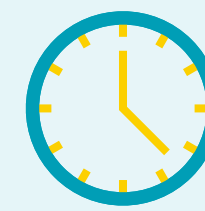


Industry supporting **pilots and alliances**

**Truck manufacturers marketing** new fuel vehicles

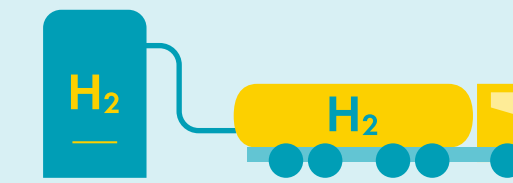


Global trade sector **most visible** to society



**Shorter replacement cycles** for trucks compared to ships and planes

## Getting into Gear report insights



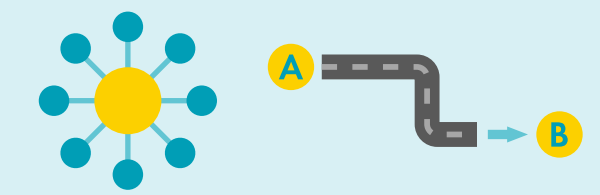
**Industry aligning on zero emission technologies** including hydrogen and battery electric vehicles



**22 solutions** identified by sector to accelerate decarbonisation



**Ten year roadmap** to deploy low and zero emission trucks at scale



**Vehicle duty cycles perspectives** will accelerate fuel choices for specific uses



**Industry players will have specific roles** in sector collaboration



**Global concerted effort** needed to accelerate change and help others to leapfrog ahead

Download the *Decarbonising Road Freight: Getting into Gear* report at [Shell.com/DecarbonisingRoadFreight](https://Shell.com/DecarbonisingRoadFreight)

**GOAL**  
Achieve net zero emissions for road freight by 2050