A 10-POINT ACTION PLAN FOR A COMPETITIVE EU SINGLE MARKET IN TRANSPORT

The Commission's 2025 strategy "A Simpler Single Market to Make Companies Choose Europe" identified transport and logistics to be among the most significant barriers to a fully functioning Single Market.

Reliable supply and distribution are essential to the chemicals industry, which depends on sufficient transport capacity across all modes. Chemical companies balance safety, reliability, efficiency, and emissions; yet current EU regulations and fragmented national rules reduce efficiency and cross-border reliability.

International rail freight transport faces uncoordinated infrastructure capacity and traffic management, slowing progress on the Green Deal's modal shift goals, while single wagonload transport, vital for chemical supply chains, continues to decline. Combined transport is constrained by outdated legislation and divergent support schemes, and the EU lacks a harmonised method for calculating greenhouse gas (GHG) emissions.

Road freight is challenged by diverging national rules, fragmented incentives for zero-emission fleets, and a driver shortage, delaying investment and weakening resilience and emission performance. In particular, for sectors with strict safety requirements, transitioning to greener fleets remains difficult without adequate infrastructure, financial support, and a realistic multimodal approach.

To address these challenges, Cefic's 10-point Action Plan* brings together key measures from relevant legislative files to maintain transport competitiveness while accelerating emission reductions.

Action 1: Harmonise rail infrastructure capacity and traffic management across borders

The issue: Fragmented national approaches to infrastructure capacity and traffic management create inefficiencies, border delays, and an uncompetitive rail supply chain. Without harmonisation, cross-border rail freight flows remain unreliable and modal shift is stalled.

The solution:

- Rapidly implement frameworks developed by the European Network of Infrastructure Managers (ENIM) that reflect operational realities, supported by digital tools.
- Ensure harmonisation to prevent fragmentation and enable efficiency, reliability, and transparency.

The result:

A strengthened rail freight competitive position will give shippers confidence to plan and invest in an increased share of rail in the transport mix. It will directly support the Green Deal's objectives for sustainable mobility and reduced emissions.

Action 2: Systematically involve stakeholders in rail infrastructure capacity planning and foresee performance management

The issue: Capacity planning lacks direct input from rail undertakings, shippers, and logistics providers, leading to misaligned capacity allocations and delayed identification of bottlenecks. Without transparent and market-oriented performance requirements and follow-up, rail service quality and reliability cannot respond to market expectations.

The solution:

- Ensure the systematic and active involvement of all stakeholders in capacity planning and performance reviews through the European Railway Platform. Their operational expertise and market insight will help align planning with real demand and enable early detection of bottlenecks.
- The industry needs independent performance management, with market oriented KPIs, transparent dashboards, and collaboratively agreed corrective actions facilitated through the European Railway Platform.

The result:

Rail freight will significantly improve service quality and reliability, becoming more predictable and customer focused. Higher customer satisfaction will make rail a more attractive option for freight transport, thus supporting modal-shift objectives and competitiveness.

**This paper presents measures from the proposed Greening Freight package - including the Rail Infrastructure Capacity Regulation, Combined Transport Directive, Weights and Dimensions Directive, CountEmissions EU Regulation - alongside elements of the Greening Corporate Fleets initiative.*

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Action 3: Revitalise and support single wagonload rail transport

The issue: Single wagonload rail services are vital for the chemical industry, enabling the safe transportof certain raw materials between sites. Yet, these services are in structural decline, facing high costs and operational complexity. Targeted measures are needed to avoid critical supply issues for raw materials, a reversed modal shift to road, or a combination of both.

The solution:

- The European Network of Infrastructure Managers (ENIM) should establish aligned capacity processes and cross border traffic management to ensure predictable paths for single wagonload rail transport.
- Practical solutions, such as last-mile collaboration, neutrally operated open-access shunting yards, and increased digitalisation are critical.
- All stakeholders should collaborate on the review of the 2015 EU study on single wagonload rail transport, aiming to develop best practice guidelines and policy requirements.

The result:

Rail will remain a viable and safe option for complex supply chains, preserving essential connectivity for the chemical industries and their regional clusters. This will not only strengthen resilience in material supply but also support emission reduction goals by preventing reversed modal shift to road.

Action 4: Modernise combined transport policy

The issue: Combined transport is essential for efficient and sustainable multimodal logistics. However, the current legislative framework is no longer fit for purpose. Key concerns include the scope, eligibility criteria and administrative requirements, which are insufficient to safeguard the combined transport policy's competitiveness and operational efficiency.

The solution:

Modernise the legislative framework, including:

- integrating domestic transport within its scope;
- defining eligibility criteria based on sustainability benefits rather than distance, and ensuring these criteria are harmonised across Member States;
- deploying digital solutions to streamline operations and verification processes.

The result:

More goods can make use of competitive transport by rail or inland waterways, based on its emission reduction potential. Effective digital solutions will improve efficiency reduce administrative costs and minimise human errors.

Action 5: Set ambitious, coordinated support measures for combined transport

The issue: Next to the already mentioned administrative issues, the fragmentation of the national regulatory and economical support schemes creates inefficiencies for combined transport. The lack of coordination undermines further growth in intermodal transport.

The solution:

Prioritise robust, EU-coordinated economic and regulatory support, including the following key actions:

- target economic support towards reducing terminal handling costs and rail infrastructure charges;
- align timelines and provisions of the Weights & Dimensions Directive and CountEmissions EU;
- exempt combined transport road legs from weekend driving bans, including the movement of empty containers.

The result:

These supportive measures will make combined transport more competitive compared to road-only freight. They collectively reduce costs, improve operational efficiency, enhance regulatory clarity, and accelerate the shift toward sustainable, multimodal freight transport.

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Action 6: Facilitate cross-border use of heavier and longer vehicles

The issue: Cross-border road transport faces inefficiencies due to fragmented national rules on vehicle weight limits and configurations. This lack of harmonisation creates barriers to operational efficiency and slows progress on emissions reduction.

The solution:

- Adopt EU-wide harmonised rules enabling a maximum gross weight of 44 tonnes, or 48 tonnes for combined transport, as well as European Modular System configurations for cross-border operations.
- Foresee infrastructure upgrades and mutual recognition of driver qualifications.
- The revised Weights and Dimensions Directive should guarantee technological neutrality and avoid unnecessary restrictions that hinder innovation.

The result:

Higher weight limits will reduce the number of trips and drivers, resulting in reduced fuel consumption and lower CO_2 emissions. Infrastructure upgrades and qualified drivers ensure safe operations under new configurations, whilst technology neutrality fosters innovation in sustainable road transport solutions.

Action 7: Incentivise transition to zero-emission vehicles and intermodal solutions in a harmonised way across the EU

The issue: The transition to neutral and zero-emission vehicles is slowed by fragmented national incentives. Without coherent rules on weights and dimensions and predictable policies, investment decisions are delayed, undermining progress towards EU climate targets.

The solution:

- Introduce additional EU-wide weight and length allowances for low- and zero-emission vehicles, combined with coherent incentives across all vehicle segments.
- Maintain technology neutrality, based on well-to-wheel emission limits, and align incentives with CO_2 standards and intermodal policies to create a stable, predictable investment environment that encourages rapid adoption.

The result:

These measures will accelerate the transition to low- and zero-emission road freight, improve competitiveness, and deliver tangible progress towards EU climate objectives. It will reduce investment uncertainty and foster innovation in sustainable road transport solutions.

Action 8: Implement and support a unified, ISO-based GHG emission calculation framework (CountEmissions EU)

The issue: The absence of a harmonised methodology for GHG emissions calculation creates inconsistencies in reporting, undermines transparency, and risks unfair competition across the Single Market. Fragmented approaches also increase administrative burdens, particularly for SMEs.

The solution:

- Implement the single EU-wide methodology based on ISO 14083 in a timely manner to ensure credible and comparable emissions reporting. The use of primary data should be prioritised, supported by a trusted emission-factor database and sector-based default factors.
- Provide phased onboarding and user-friendly tools for SMEs to avoid undue administrative burden.
- Align this methodology with related legislation, such as CO_2 standards and weights and dimensions rules, to ensure consistency and predictability.

The result:

A harmonised framework will deliver reliable and comparable emissions data, enabling transparent reporting to customers and regulators. This will support better-informed transport choices, fair competition, and progress towards emission reduction strategies, whilst ensuring broad participation without overburdening smaller operators.

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Action 9: Address driver shortage and improve working conditions

The issue: The persistent driver shortage poses an escalating risk to supply chain resilience. Without immediate action, continuity of supply and delivery will be compromised, and the industry's competitiveness will suffer.

The solution:
Member States and industry measures should accelerate the implementation of the Trans-European Transport Network guidelines regarding safe and secure parking areas and improving rest facilities. The quality and security of these facilities need to be increased to attract and retain drivers.

The result:
Improved working conditions and targeted measures will enhance recruitment and retention of drivers, create safer and more attractive workplaces, and foster a more inclusive workforce. These changes will also strengthen supply chain resilience and efficiency.

Action 10: Create an overall supportive and safe ecosystem for greening corporate fleets

The issue: The transition to greener corporate fleets is critical but challenging, particularly for sectors with high safety requirements such as chemicals. Road freight emission reduction does not work without enabling infrastructure, economic support, and risk mitigation. Overly restrictive regulation merely risks increasing costs, limiting flexibility, and slowing adoption, whereas a multimodal supply chain emission reduction strategy is what industry really needs.

The solution:

- Accelerate the deployment of charging and refuelling infrastructure, prioritise grid upgrades, and provide economic support measures.
- For chemical sites, ensure robust risk assessments and safety procedures to support evaluating alternative solutions such as hydrogen and battery electrical trucks.
- Adopt technology-neutral policies that encourage investment and market uptake.
- Engage SMEs to ensure inclusivity and avoid disproportionate burdens.

The result:
A coordinated, technology-neutral approach will enable a successful, inclusive, and competitive shift to green corporate fleets across the EU. By combining infrastructure readiness, safety assurance, and supportive policies, these measures will drive market uptake, reduce emissions, and maintain operational flexibility while fostering innovation and resilience.

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