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Future transport survey

Large transport buyer's and environmentally friendly and fossil-free transport.



Volvo Trucks

9/6/2022



Background

Volvo Trucks work continuously to take on the role as the main spokesperson of the industry, generally, but also clearly linked to topics such as safety, environment and sustainability.

Sustainability is becoming more and more important for consumers. Consumers are expecting a shared responsibility between themselves and brands.

It puts pressure on all companies, including transport-intensive industries, to take greater responsibility for the environment and sustainability in the future. Transport buyers can therefore be assumed to have a large impact on the requirements set on the transport operations.

Volvo want to increase knowledge and understanding of how this trend affects future procurement of transport services, especially regarding the environmental aspect.



Aim and Objective

Research aim:

Reliable and valid result, facts, on the requirements for environmentally friendly and fossil-free transports in future transport procurements.

Survey objectives:

Research large transport buyer's attitudes towards, future intentions and requirements from customers and consumers, regarding procurement of environmentally friendly and fossil-free transport.

SURVEY DESIGN

SCOPE



- **8 European markets** - Germany, France, UK, Italy, Spain, Netherlands, Sweden and Norway

SAMPLE SIZE



- **N = 100**
- 10+ interviews per market

TARGET GROUP AND TARGET PERSON



- **Important transport buyers** – Large (medium) size org., manufactures and/or sells consumer products.
- **E-commerce companies and Manufacturing companies** - Consumer electronics, Clothes, Fashion or Food & groceries
- Senior people, good knowledge of and influence on the procurement of transport services at their company. Typically responsible for Procurement, Logistics, Supply Chain Manager and/or Sustainability.
- Free-find approach, identification of valid respondent via telephone screening

METHOD



- **Telephone interviews**
- Interviews conducted in the official language of each market

TIME SCHEDULE



- **Recruitment and data collection in May-June 2022**

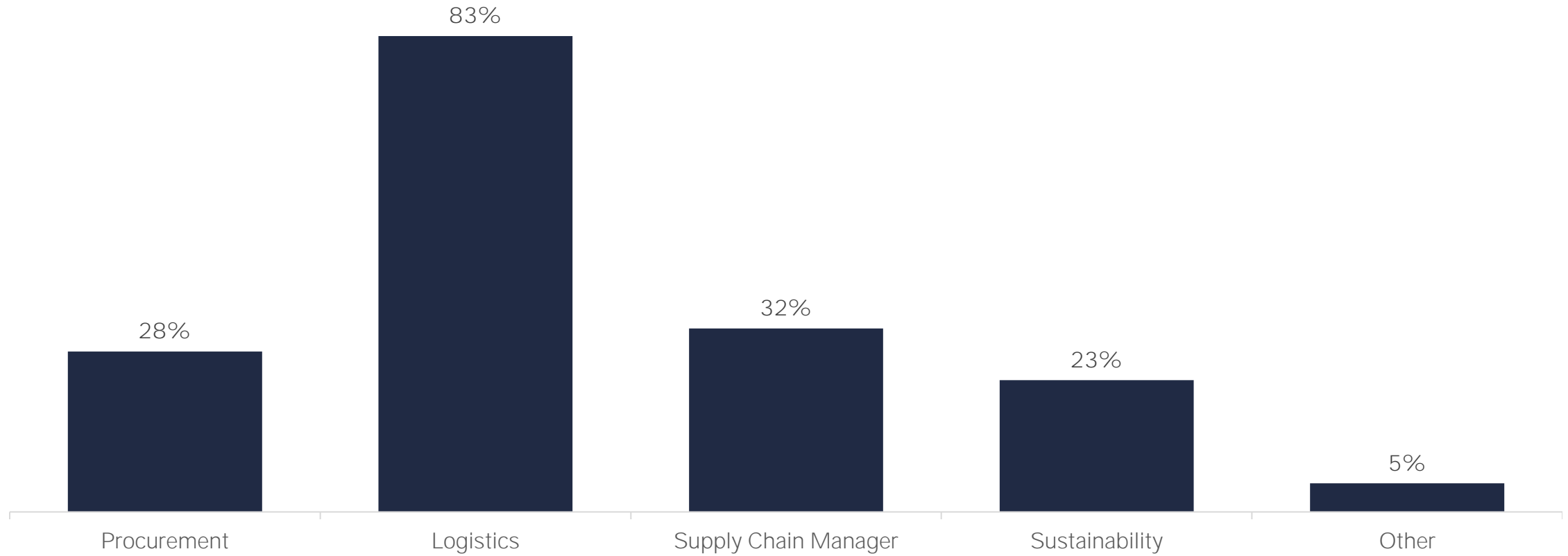
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roles and business descriptions

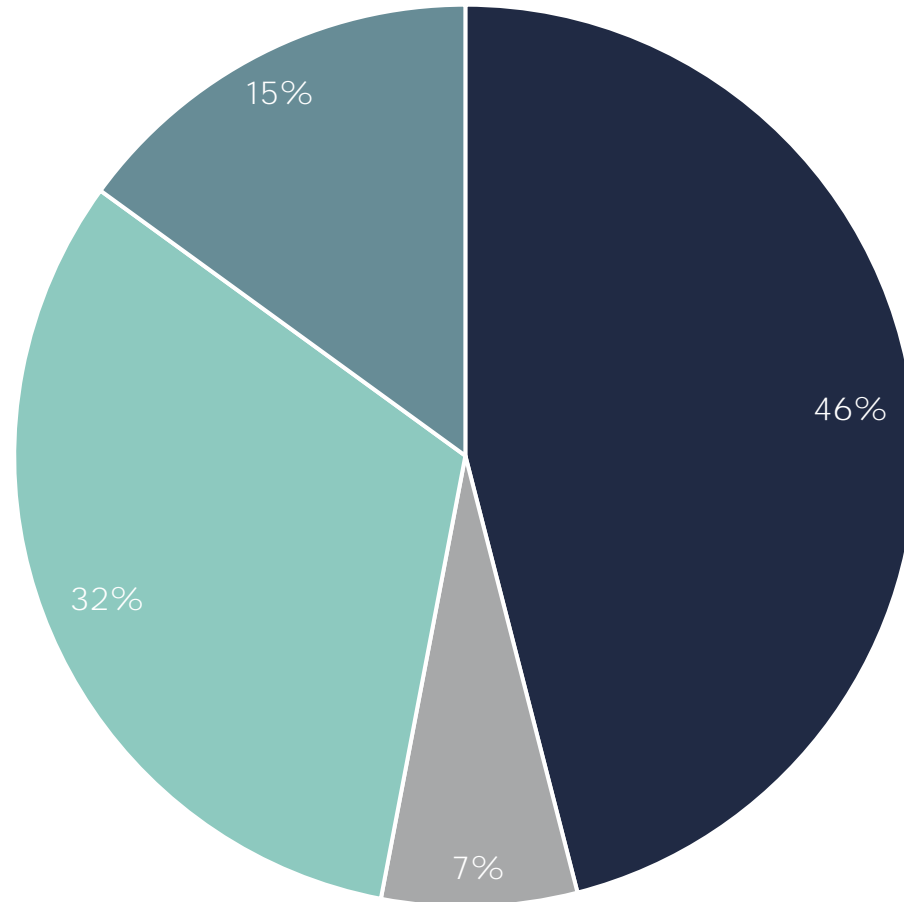
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Role and responsibilities



Business descriptions



- Sells consumer products directly to end consumers but has no own production.
- Manufactures consumer products and sells directly to end customers.
- Manufactures consumer products and sells through distributors/resellers.
- Manufactures consumer products and sells directly to end customers and through distributors/resellers.

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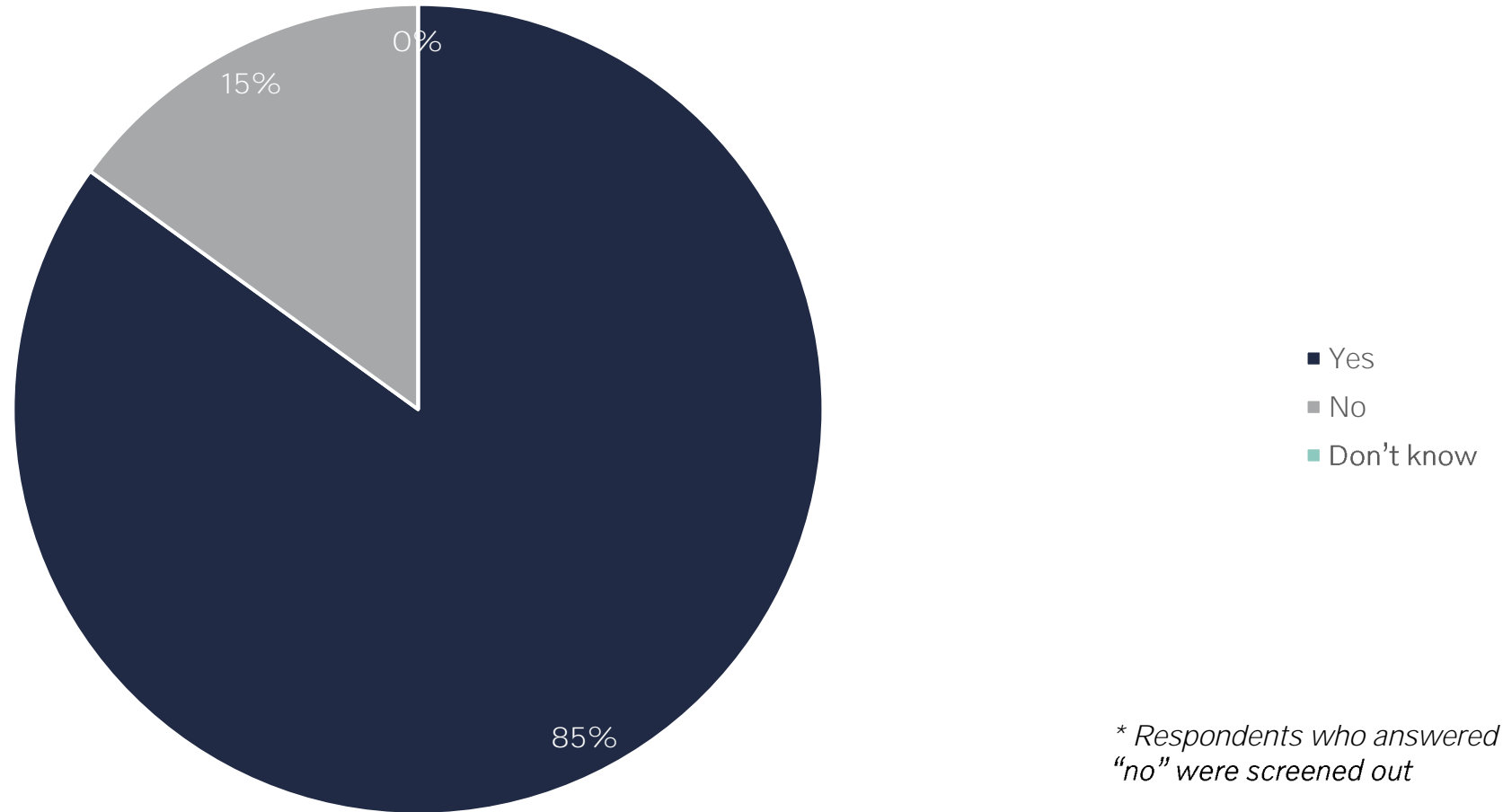
Sustainability program and ambitions

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Environmental-/sustainability targets

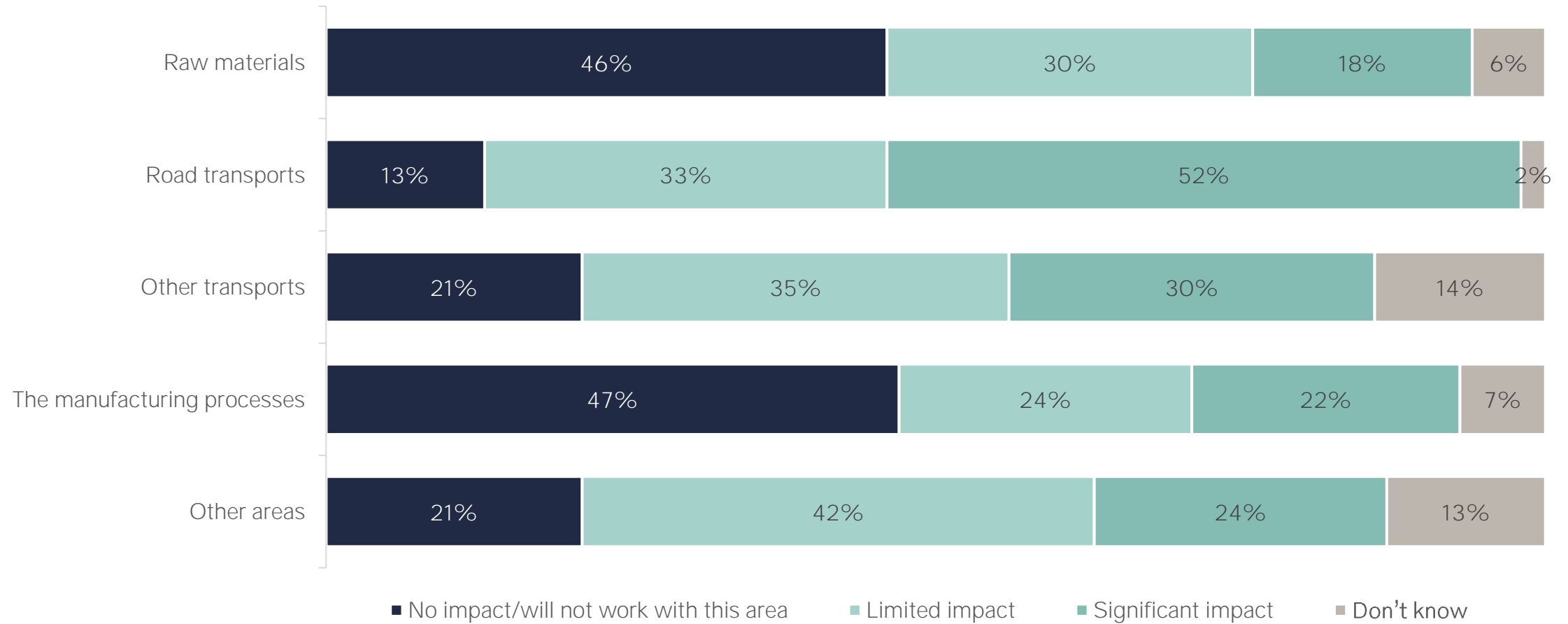
Vast majority of transport buyers have environmental-/sustainability targets that work to reduce their climate footprint



* Respondents who answered "no" were screened out

Areas to reduce CO2 emissions

Road transports, most prioritized area to work with to reduce CO2 emissions, and also expected to have the highest impact on total CO2 emissions

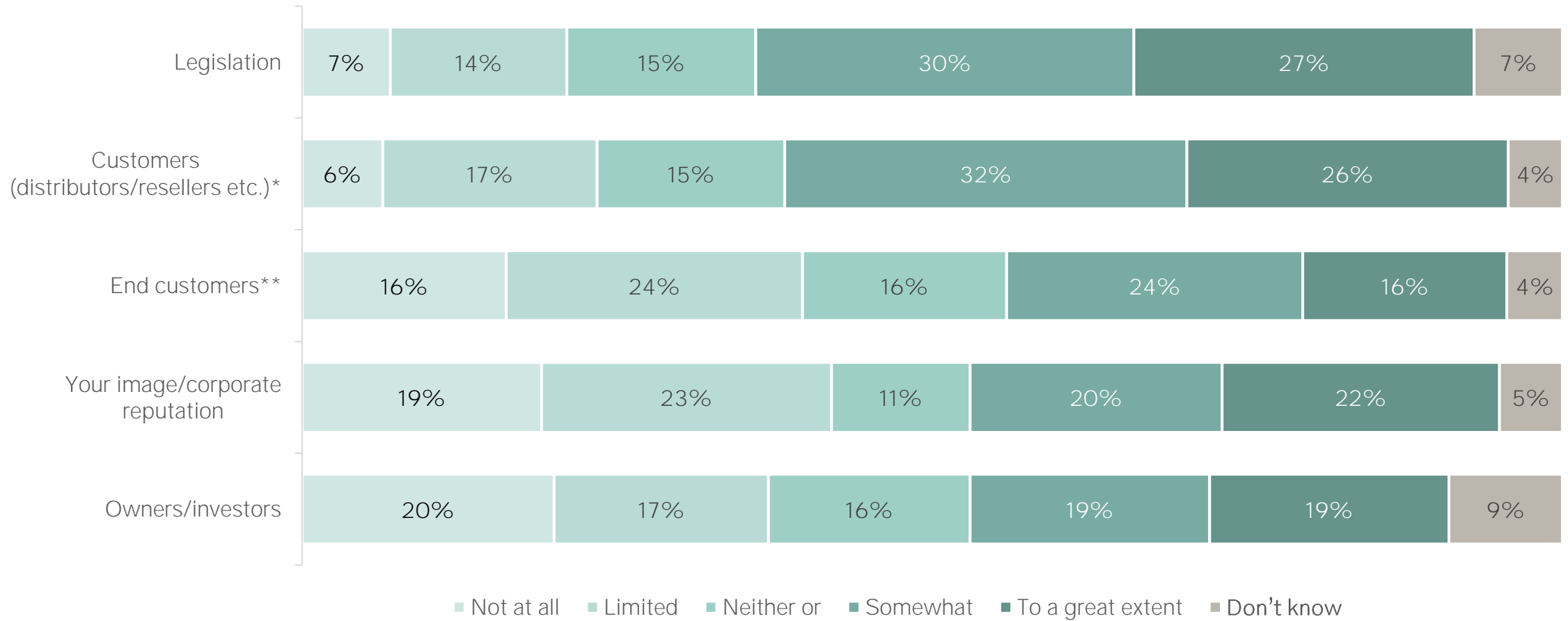


* Respondents who answered, "no impact" or "don't know", for road transports were screened out

Impact from customers/end-customers

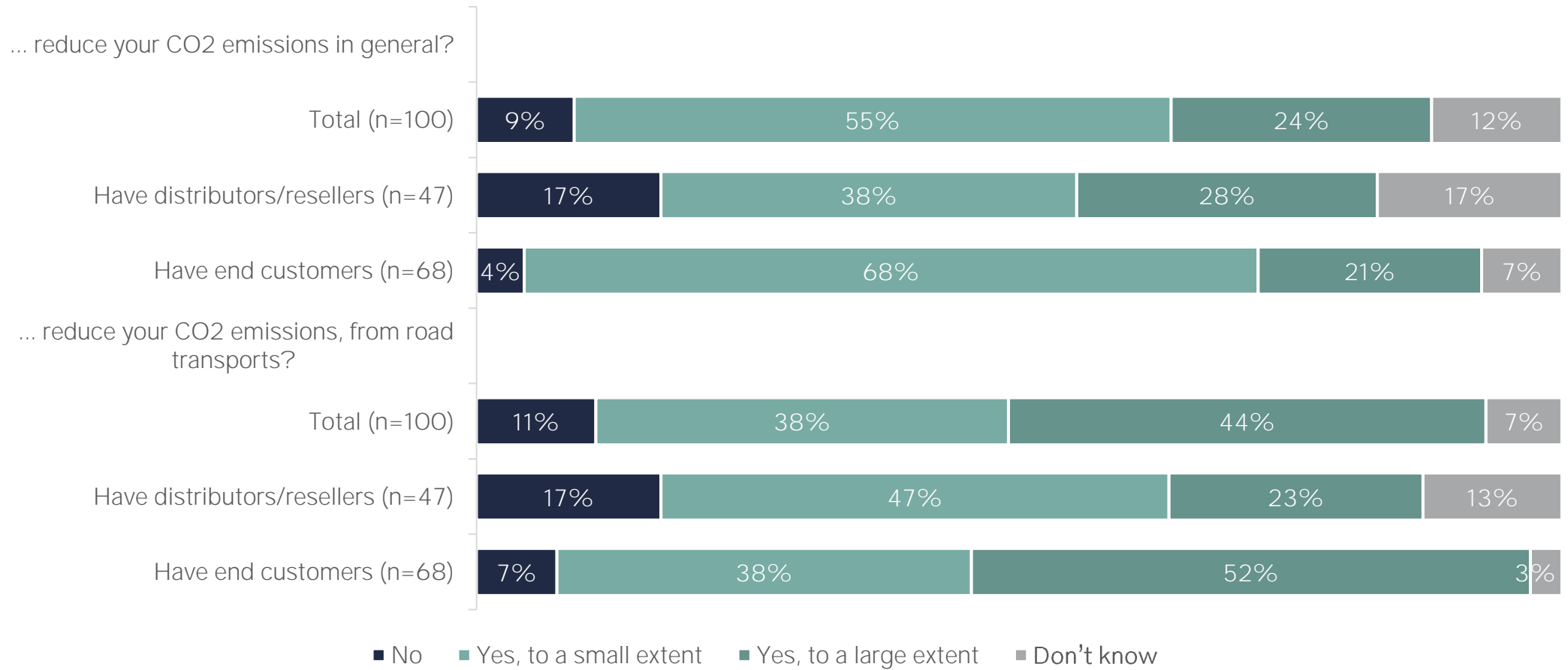
Influencing ambition to lower CO2 emissions

Highest influence on the ambition to lower the CO2 emissions coming from Customers (distributors/reseller) and Legislation



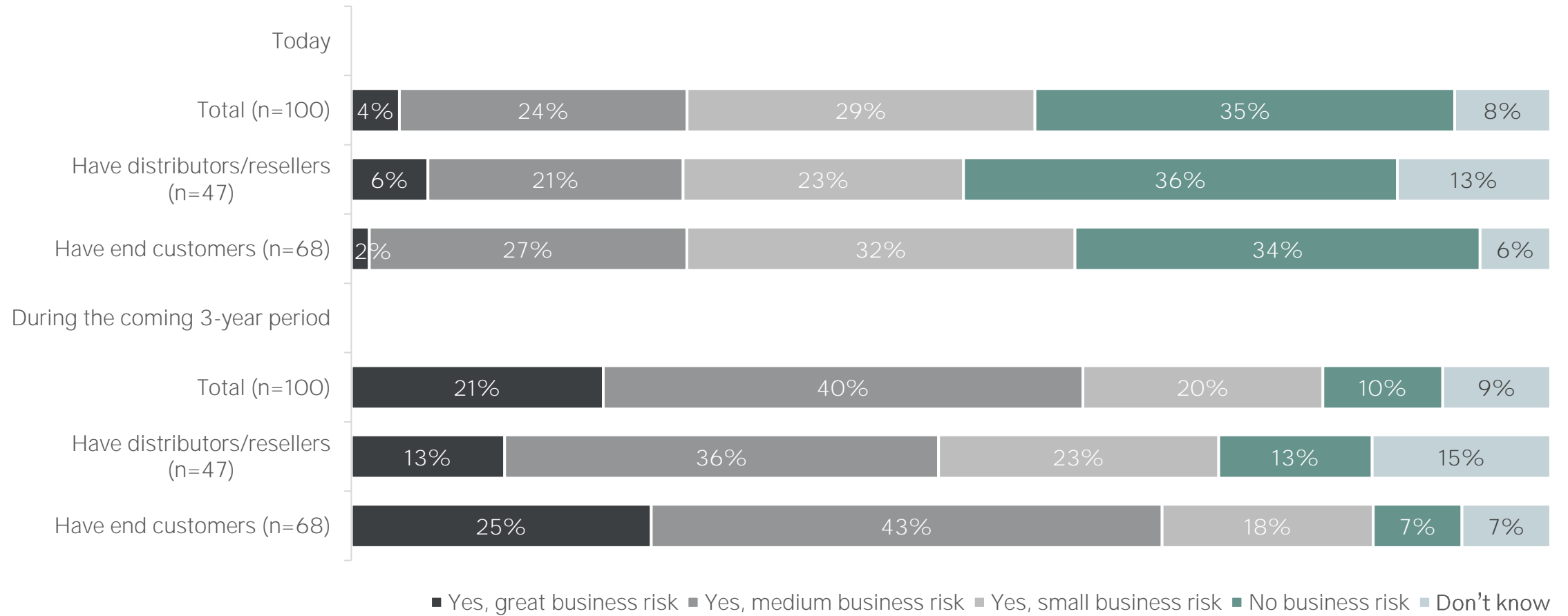
Expectation from customers

There is an expectation from customers that they work to reduce CO2 emissions in general and to an even greater extent from road transport



Anticipated business risks

Transport buyers anticipate increased business risk, that they risk losing customers, if they can't transport their goods with little or no CO2 emissions to the extent demanded in the market. 6 out of 10 consider the risk to be high or medium high.



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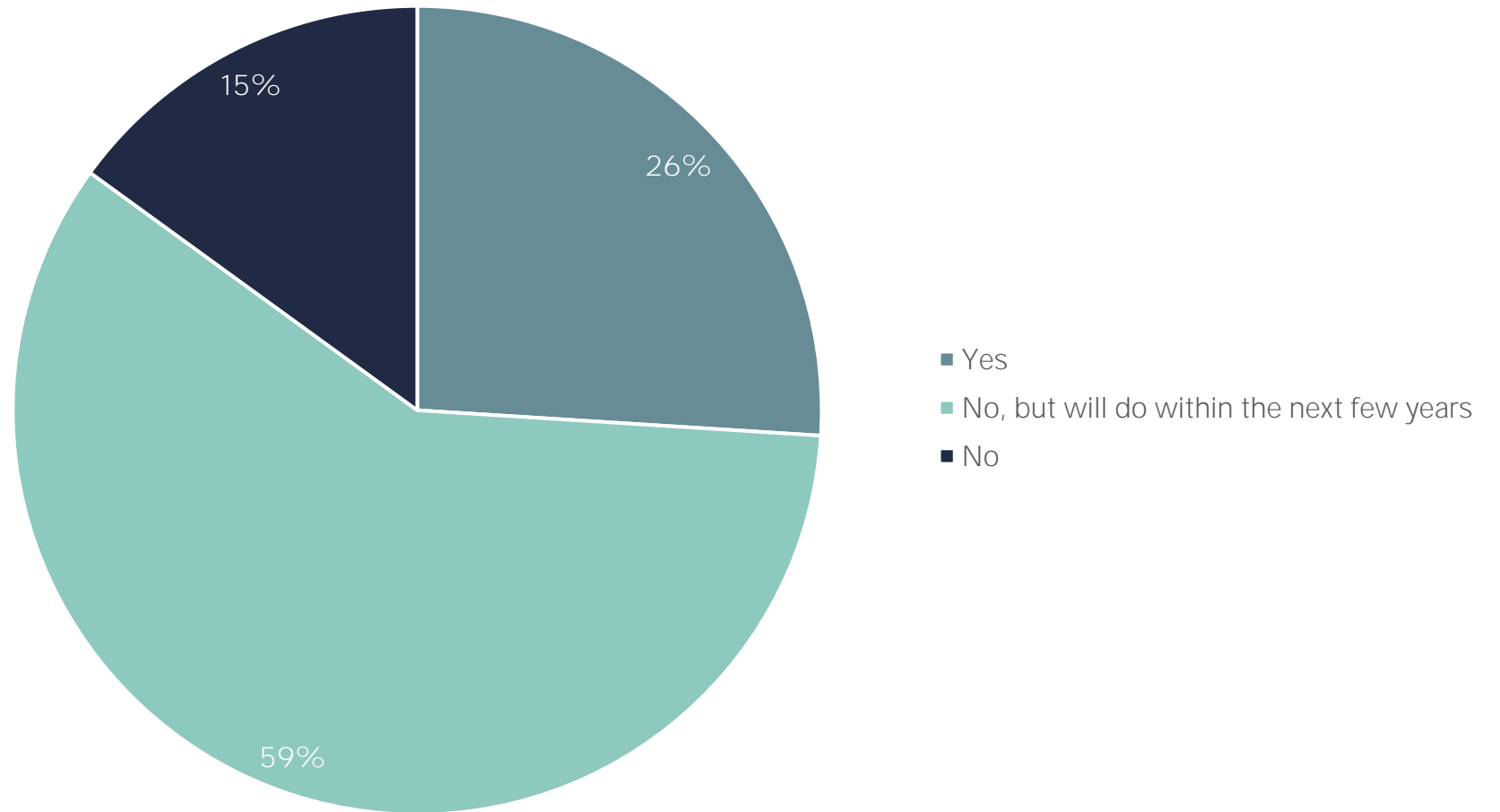
Procurement of transport services

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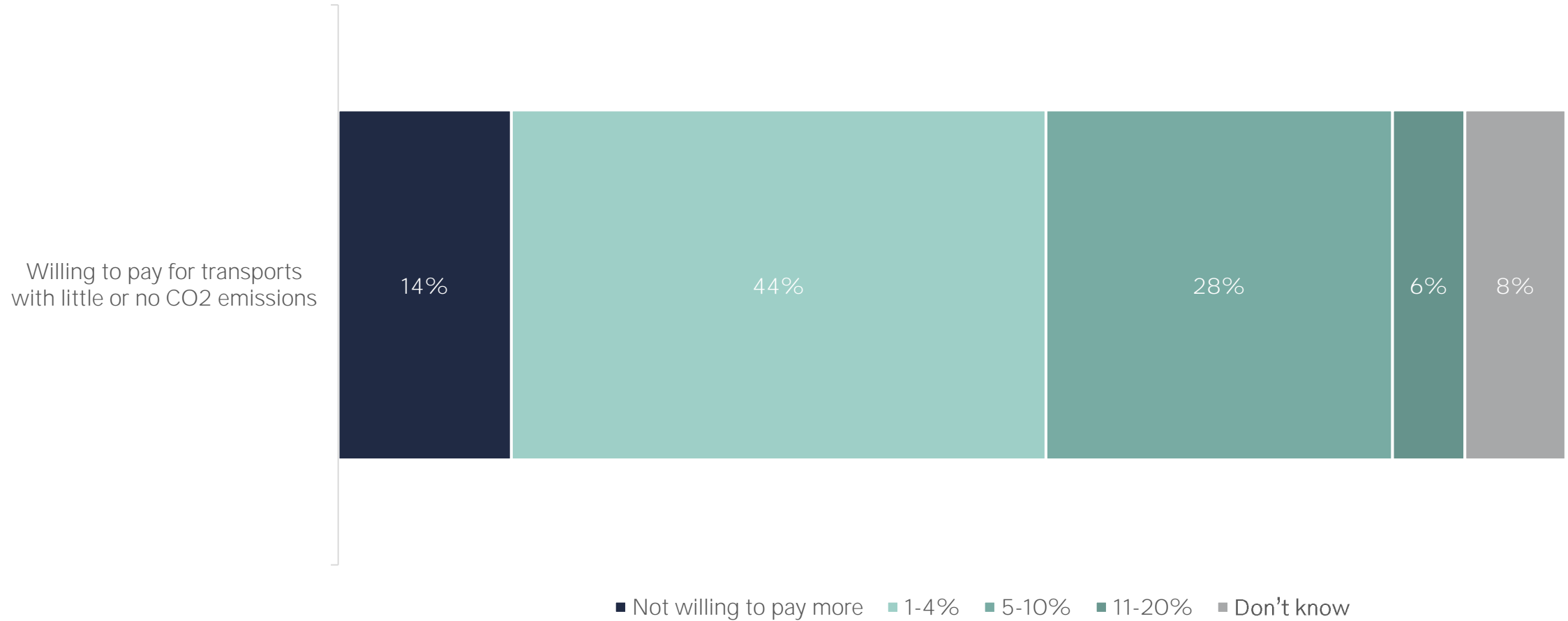
Demands on road transports with little or no CO2

Today, 1 out of 4, make demands on road transports with little or no CO2 emissions when you procure transport services, **but within a few years a vast majority will do so!**



Willing to pay for transports with little or no CO2 emissions

There is an insight that transports with little, or no CO2 emissions can cost more.
 8 out of 10 are willing to pay more, 1 out of 3 are willing to pay 5% + for transports with little or no CO2 emissions.



Likelihood of changing supplier of transport services

85% of the transport buyers claims that it is likely that they will change supplier of transport services if they fail in meeting the requirements for transports with little or no CO2 emissions

