

From Scale to Flexibility: A Changing Reality for Inland Shipping



Van Nieuwpoort Groep

- Family owned company since 1905
- Active across the entire construction value chain
- Chain of business units that reinforce each other:
 - Area development
 - Construction raw materials
 - Ready-Mix Concrete
 - Prefab Concrete
 - EPS Products
- Focus on sustainable and smart production, transportation, and construction
- Long-term continuity and integrated supply chain approach



Inland Waterways as Strategic Infrastructure

- Supply of sand, gravel and crushed stone for housing, infrastructure and energy-transition projects
- Own extraction projects in the Benelux and Germany
- Network of depots across the Benelux
- Long-term partnerships with approximately 45 inland vessels
- Strong focus on sustainable extraction and transport
- Reliable large-scale transport of essential construction materials
- Reduced road congestion and emissions
- Critical for future housing, infrastructure and climate adaptation projects
- Key enabler of circular and sustainable construction chains



Main challenges (CCR countries)

- Infrastructure: addressing overdue maintenance
- Vessel availability and demographics
- Sustainability challenges and required investments



Afb. 10.1-1 MarineTraffic begin dec. 2025: schepen > 110m



Afb. 10.1-2 MarineTraffic begin dec. 2025: alle NL schepen



Key findings in recent studies

- The decline in freight volumes transported by Class I–IV vessels is not fully absorbed by the larger vessel fleet
- Possible reasons for the decline:
 - A smaller fleet, reducing flexibility and increasing focus on large, stable cargo flows
 - A decrease in specific cargo types, such as coal
 - Modal shift to other transport modes (estimated to account for around 50% of the decline)
- Operators of Class I–IV vessels report high utilization rates, despite the economic downturn
- Shippers indicate a willingness to move more cargo with Class I–IV vessels, but available capacity is perceived as uncertain

Key challenge: Declining Class I-IV fleet capacity while demand for flexible and smaller cargo deliveries continues to grow.



Dutch market

- Demand: 30 milion tonnes
- Increasing use of circular raw materials
- More fragmented cargo streams
- More storage and buffering
- Growing demand for smaller vessels and flexible deliveries



Why flexibility is becoming critical

Past	Future
Large volumes	Smaller volumes
Fixed destinations	Multiple destinations
Predictable flows	Dynamic flows
Linear supply chains	Circular supply chains

Future logistics require flexibility rather than scale alone.



Solutions

- Better supply chain integration
- Autonomous sailing
- Combining fragmented cargo streams through digital matching



Future outlook

Discussion points for the sector

- Cargo pooling between shippers
- Shared logistics platforms
- AI-supported planning and vessel matching
- Better visibility of available vessel capacity
- Cross-sector cargo combinations

Question?

How can fragmented cargo streams be combined to maintain a viable and flexible inland shipping fleet?



