

Diomis conference Paris

10.3.2009

ČD Cargo

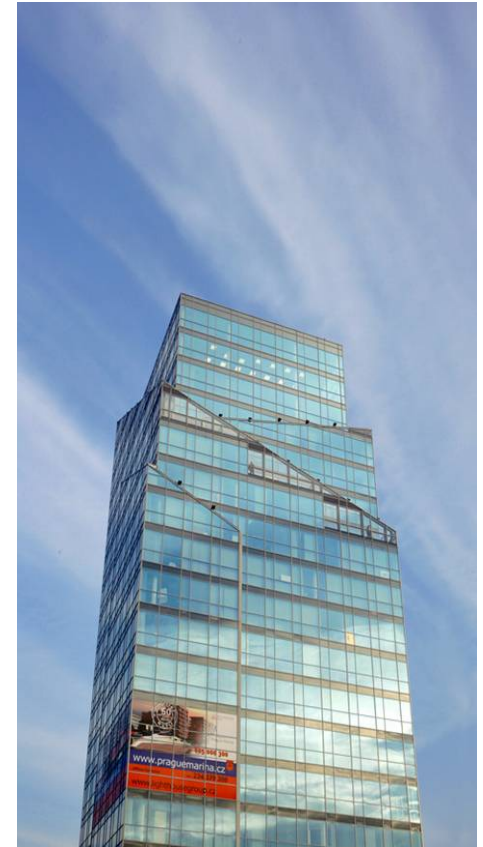
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ČD Cargo - introduction

- Established on 1. 12. 2007 as a 100% daughter company of České dráhy, a.s. (Czech Railways) = state owned company
- 11.000 employees
- 900 locomotives
- 27.000 railcars
- the biggest freight railway operator in Czech republic with 90% transport share on the Czech market

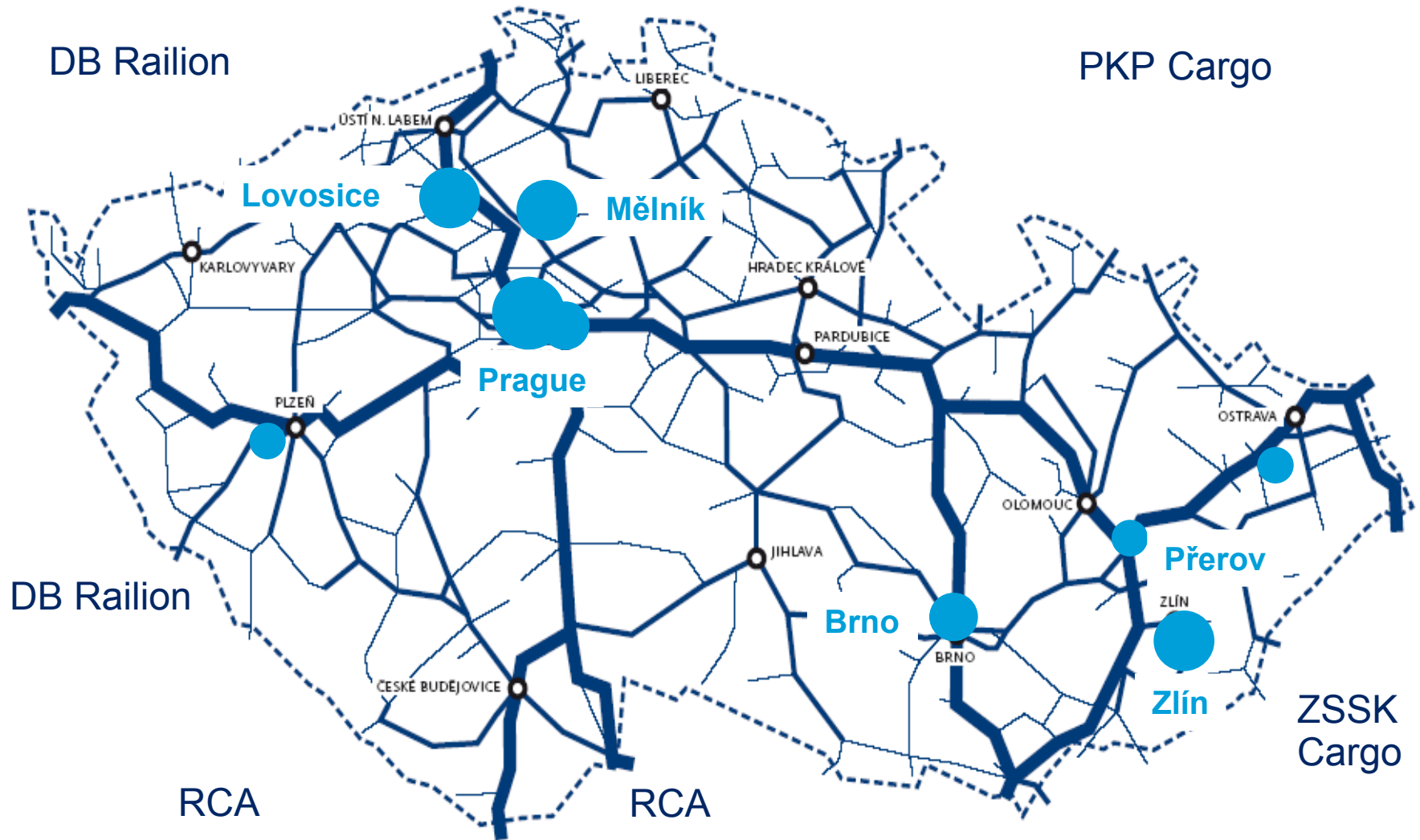
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Intermodal market in Czech Republic

- Intermodal share on Czech rail market is 10% - 8 mil. tonnes/year
- Currently about 180 block trains per week dispatched in Czech Republic
- Connecting European ports in Hamburg, Bremerhaven and Rotterdam on the north and Trieste and Koper on the south
- Antenna connections to Bratislava (SK) and Budapest (HU)
- West-east traffic – transports for Skoda Mlada Boleslav to Russia (Kaluga), currently 7 trains/week, in 2008 14 trains per week, China – CZ trains 2008
- Real domestic traffic does not exist at all in CZ
- In total 750 intermodal wagons (350 80-90ft new wagons, 400 60ft wagons), no pocket wagons available
- 97% of intermodal transport in CZ in block trains

Existing container terminals in Czech rep.



Intermodal operators in Czech republic

METRANS a.s.

- The biggest operator in CZ, about 90 block trains per week
- Operating 2 terminals in CZ (Prague Uhrineves, Zlin)
- Connecting Hamburg, Bremerhaven, new service to Rotterdam
- Connecting Koper in Slovenia
- Antenna connections to Dunajská Streda (SK)

ERS Railways s.r.o. (Maersk Line)

- About 40 trains per week
- Operating Melnik terminal
- Connecting Bremerhaven and Rotterdam ports
- Antenna connections to Bratislava (SK) and Budapest (HU)
- Maersk Line currently going for other operators (not only ERS)

Intermodal operators in Czech republic

INTRANS a.s.

- About 30 block trains per week
- Operating terminal in Prague Zizkov
- Connecting Hamburg, Bremerhaven and Rotterdam
- Antenna connections to Sladkovicovo and Bratislava (SK)

BOHEMIAKOMBI a.s.

- Daughter company of Kombiverkehr and CD Cargo
- About 15 block trains per week
- Using terminal in Lovosice (CD Cargo – DUSS joint venture)
- Connecting Hamburg Billweder and Duisburg in Germany
- Connecting Trieste in Italy (cooperation with Alpe Adria)
- The only operator for non-maritime cargo in CZ

Czech Republic / US comparison

- domestic / international traffic - no domestic traffic in CZ at all due to short distances, max. 500 km distance, domestic traffic in stats is transshipped cargo in CZ hubs
- Intermodal split – 99% of intermodal transports maritime sea containers. No swap bodies, no trailers. Tough competition with the road, existing volumes going via road even on the long distances. Our main goal is to move this cargo to the rail.
- Terminals ownership – in CZ only 1 terminal really public opened. All other terminals owned by private operators. No public money in intermodal terminals except Lovosice.
- Commercial model – as in US we have freight railways playing also „forwarder“ role, in CZ, ČD Cargo is purely traction and wagons provider. The question is – should the railway undertaking become more than traction and wagons provider or not?

Thank you for your attention

