

# Growing Intermodal Traffic in CEE Countries

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## Continental Intermodal Traffic and Terminal Strategy

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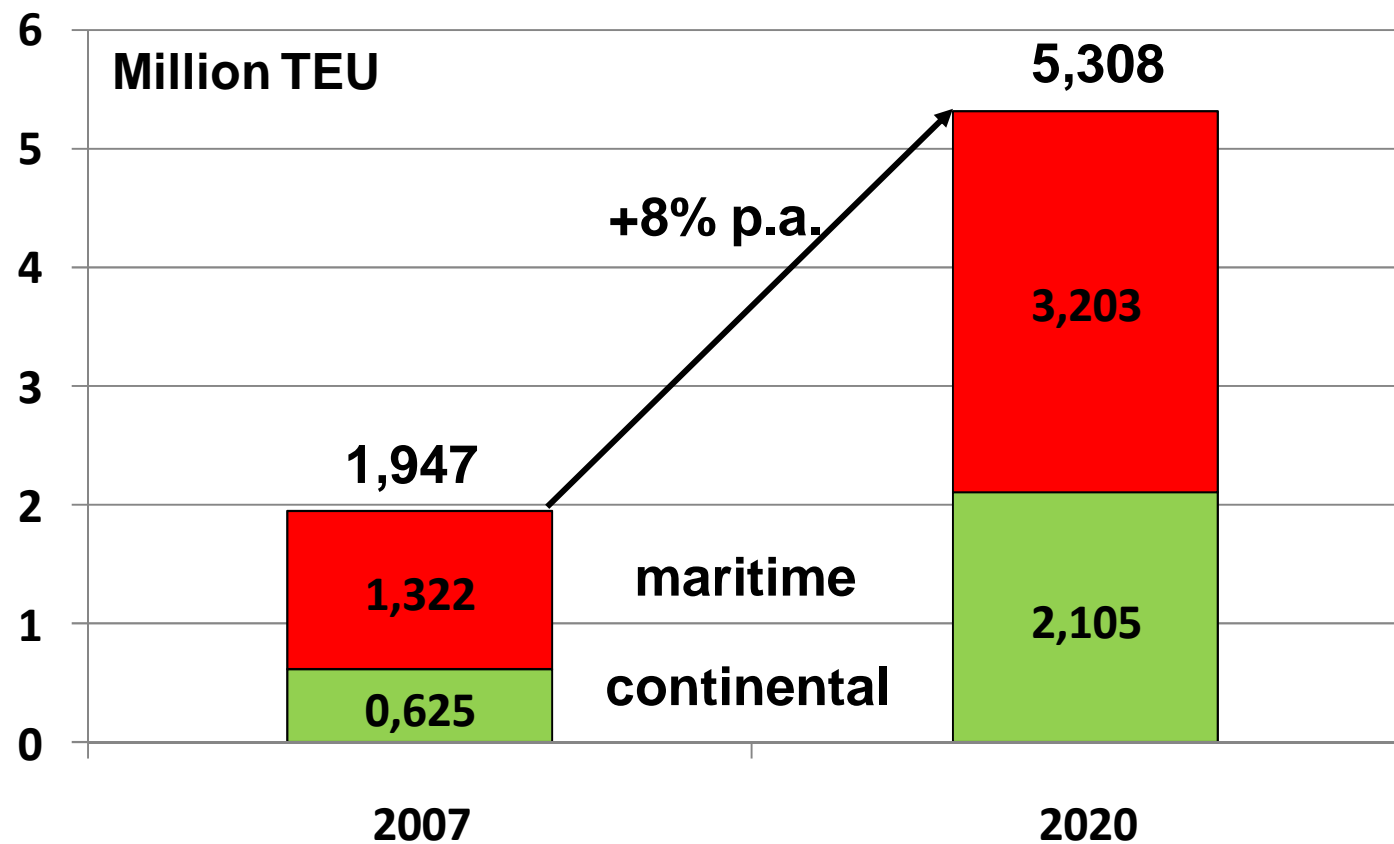


INTERNATIONAL UNION  
OF RAILWAYS

*unity, solidarity, universality*

# Continental Intermodal Traffic and Terminal Strategy

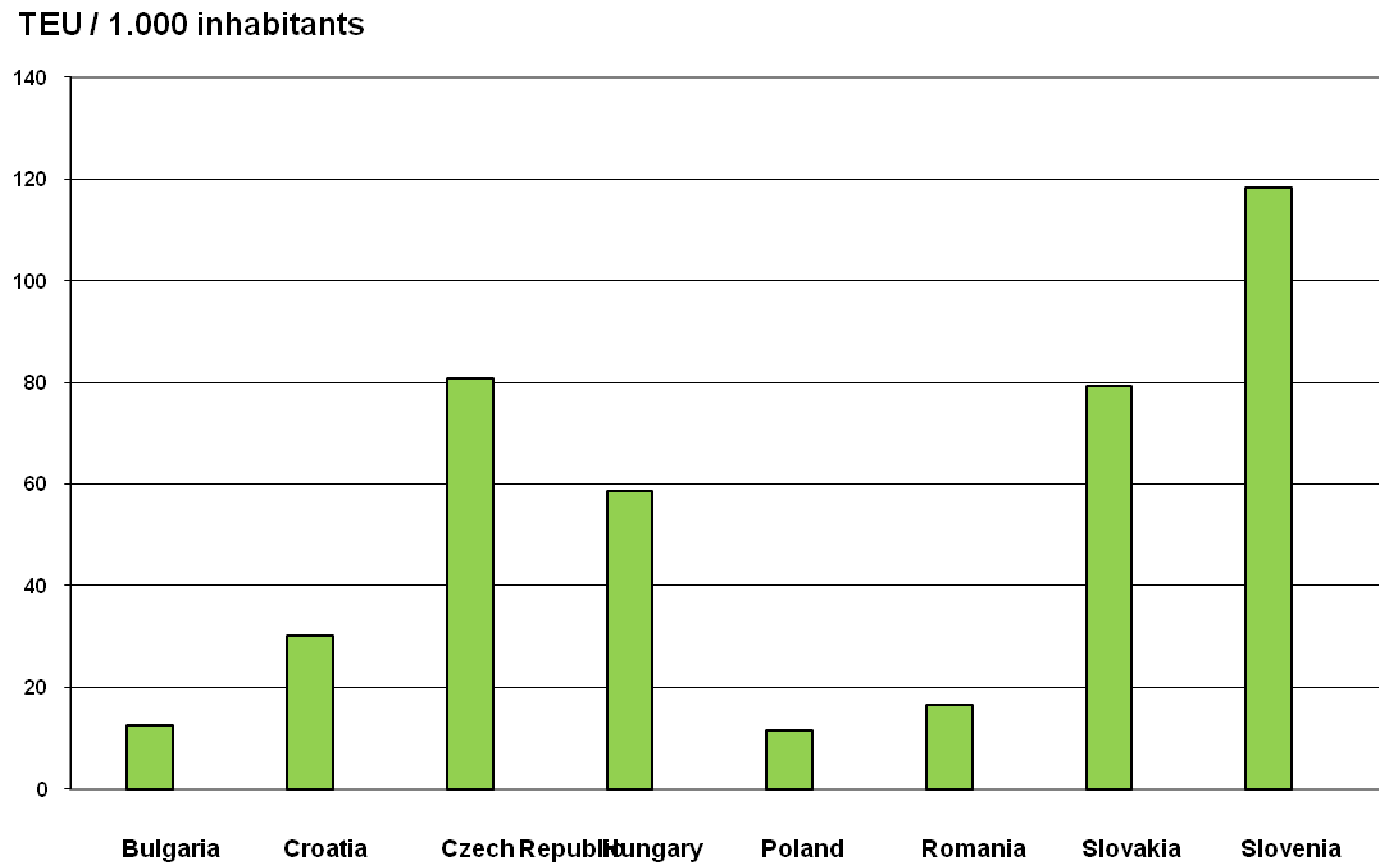
## Intermodal volume\* in CEE countries, 2007-2020



\* Transit not included to avoid double counting

Source: KombiConsult analysis

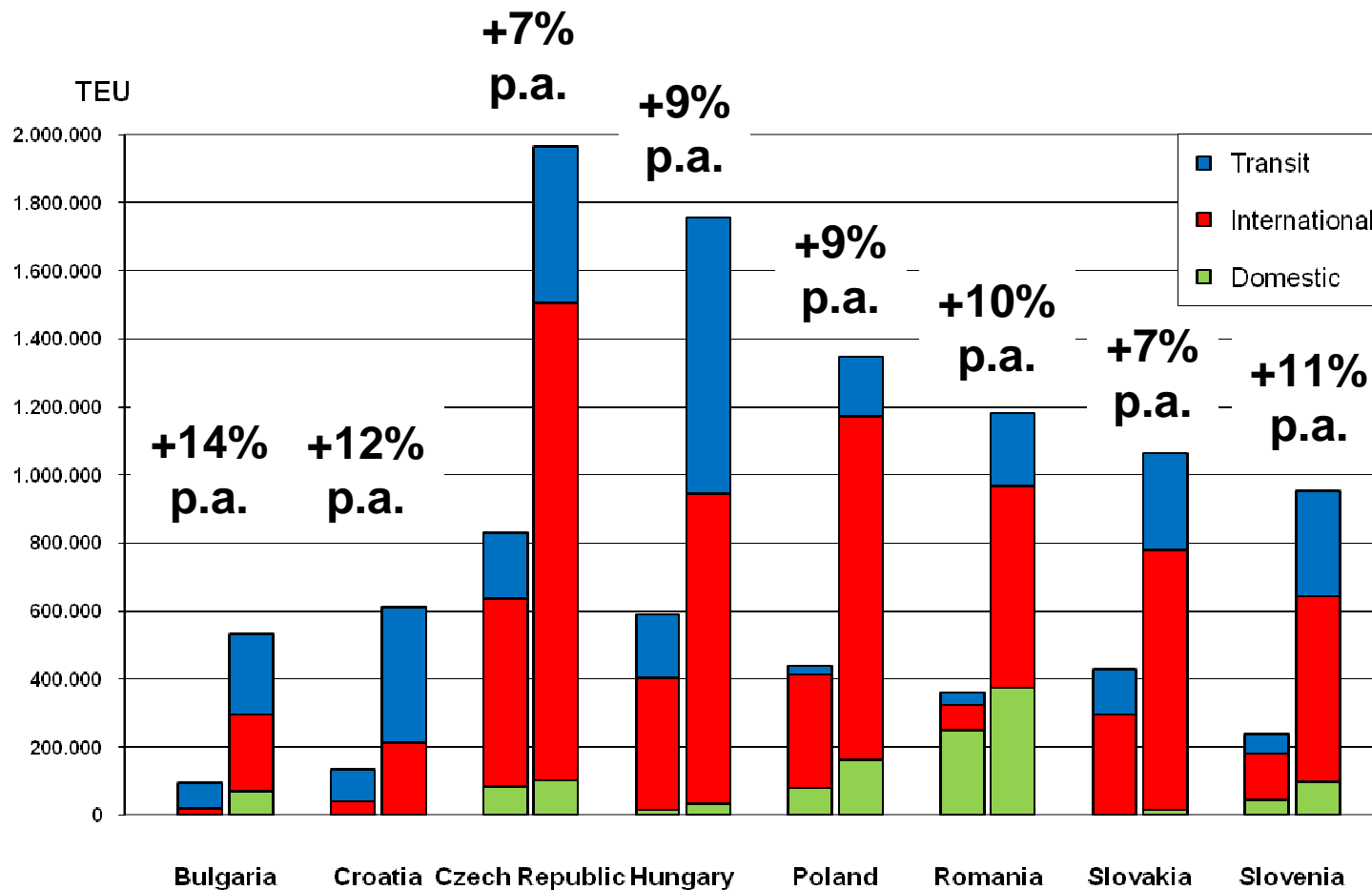
## Intermodal traffic index, TEU per capita, 2007



Source: KombiConsult analysis

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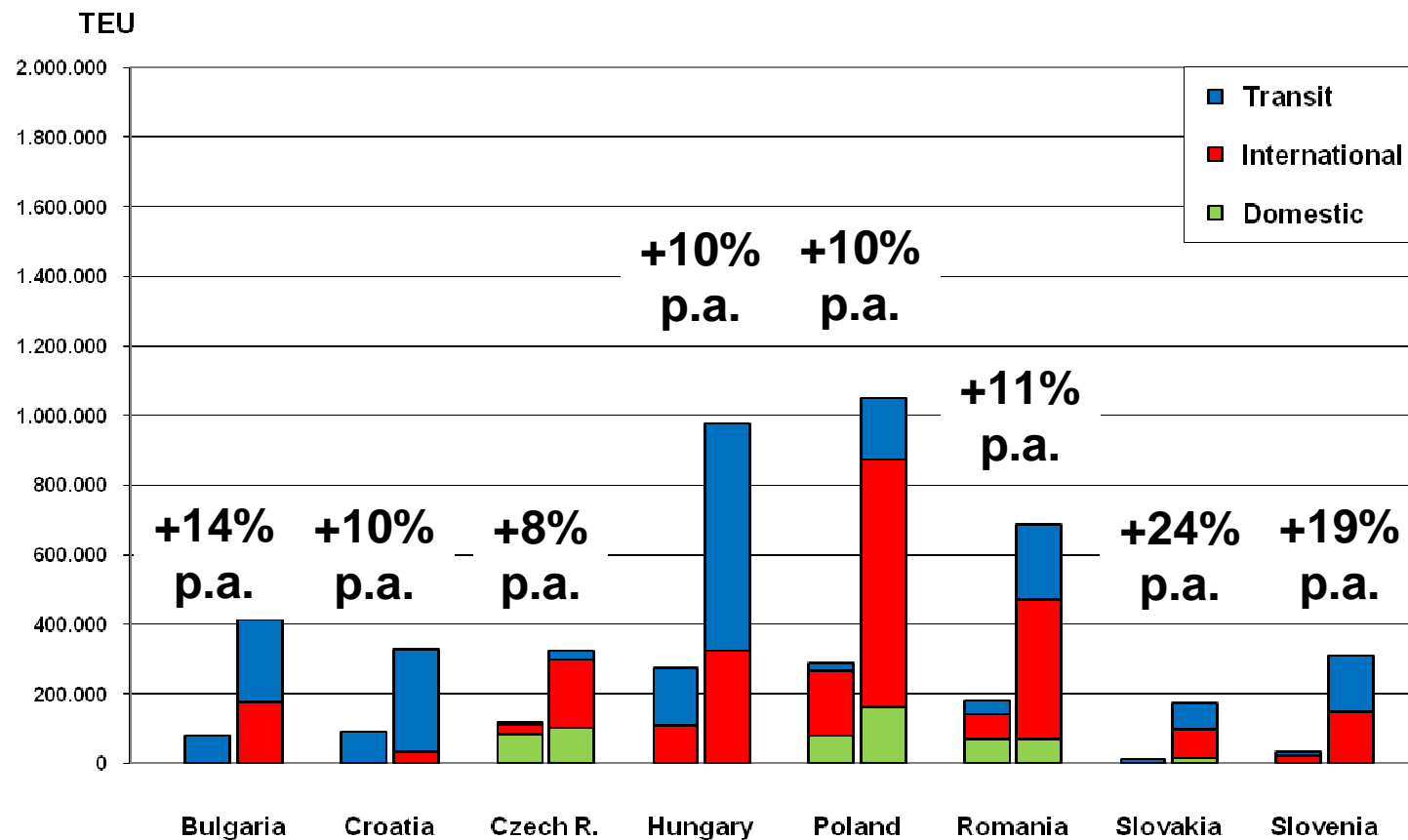
## Intermodal traffic volume, 2007-2020, total



Source: KombiConsult analysis

# Continental Intermodal Traffic and Terminal Strategy

## Intermodal traffic volume, 2007-2020, continental



Source: KombiConsult analysis

## Conditions for evolution of intermodal rail-road traffic 2020

- Implementation of dedicated logistics services
- Well functioning of intermodal industry stakeholders
- Consideration of global trends and expectations
- Socio-economic growth
- Rail infrastructure upgrading as planned and required



## Implementation of dedicated logistics services

- **The classical route still challenging:  
Western Europe – CEEC**

Example of Kaluga project -> Mr. Schultze, please...

- **Is that possible: Intra CEEC trade?**

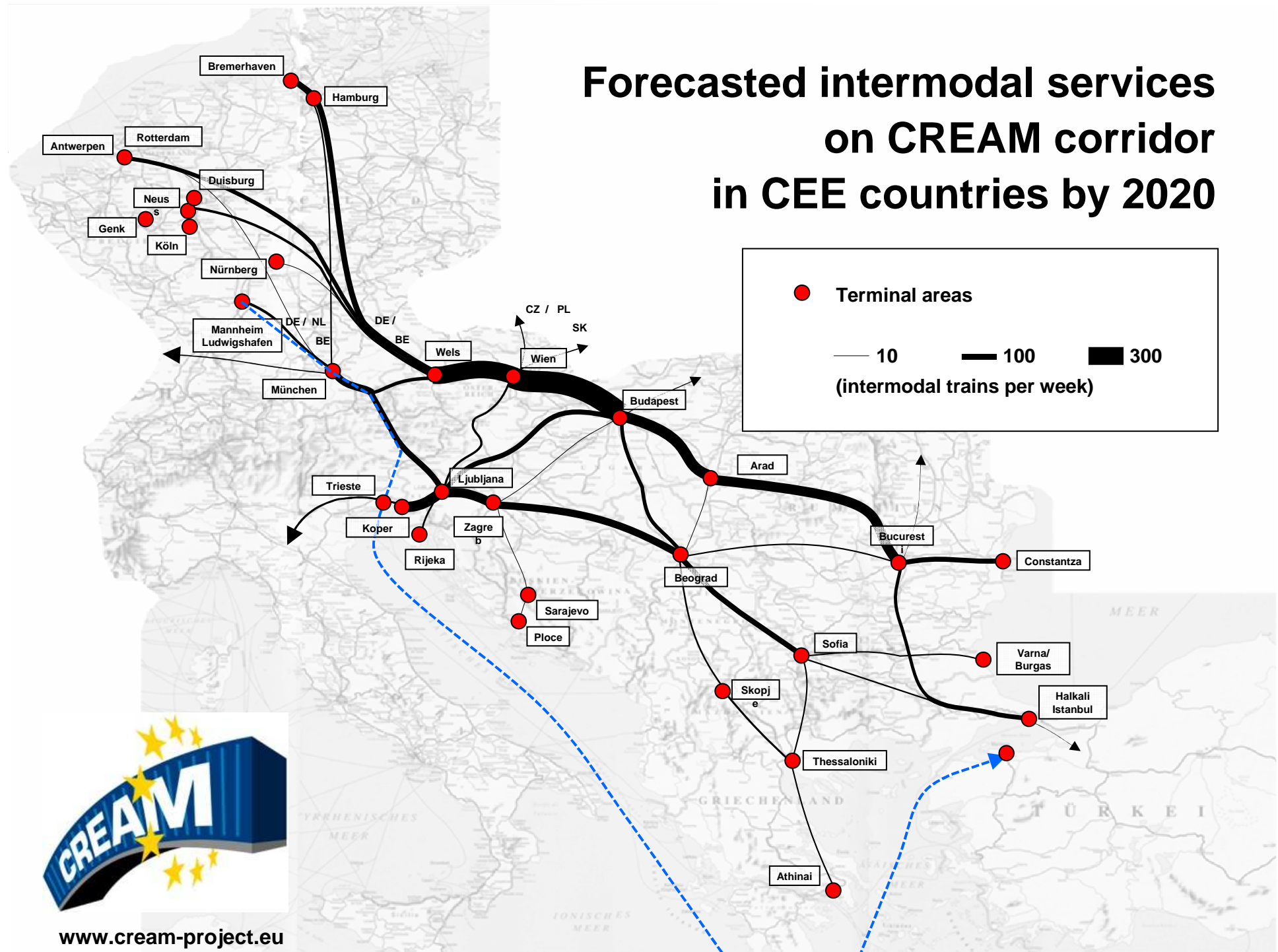
Example of Schenker -> Mr. Jerolitsch, please...

## Network operations

- The market potential on most trade lanes is sufficiently high that intermodal operators in co-operation with railway undertakings should be able to **industrialize intermodal production** and thus realize major productivity gains, which in turn contributes to improve competitiveness with road:
  - Standardization of processes and technology
  - Employment of efficient rail production systems: multi-frequency shuttle systems
  - Advanced interface management
  - Commitment to reliable and consistent services



# Forecasted intermodal services on CREAM corridor in CEE countries by 2020



## Key success factors continental intermodal services

- String-of-Pearls operation concept linking Gateway/Hub-Terminals with shuttle train services
- Time-schedules geared to the movement of consumer goods: buffer time in departure but early morning arrivals
- 95% rate of punctuality in arrival
- Consistency
- Cost-efficient service
- Fast dispatching at terminals (“fast lane”) to ensure efficient round trip schedules for trucking companies
- Sufficient terminal performance



## Market requirements on intermodal terminals

- Terminal as own entity in the intermodal transport chain
- Principle of non-discriminative access to terminals
  - Rail-side access for all licensed RUs
  - Road-side access for all operators
  - Transparent capacity allocation and pricing
- Bundling of different cargoes for better capacity utilisation
  - maritime container
  - continental loads
- Technically up-to-date



# Continental Intermodal Traffic and Terminal Strategy

## Terminal BILK Kombiterminal, Budapest



## Technical-operational requirements on terminals

- Fenced and secured: Gate Area with check-in
- Rail Access and parking tracks
- 4-5 Transshipment Tracks of train length (700 m)
- Buffer Lanes for interim storage of loading units
- Loading and Driving Lanes
- 2 Railmounted Gantry Cranes / Reach Stackers
- Road Access
- Trucking services
- Depot function for containers
- Maintenance and repair facilities

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## Impact on terminal capacity 2007-2020

Loading Units	2007	2020	
	Capacity	Capacity Need	Additional Need
Bulgaria	150.800	216.000	148.000
Croatia	115.200	133.100	44.100
Czech Republic	878.800	n.a.	n.a.
Hungary	578.250	610.525	n.a.
Poland	n.a.	820.000	n.a.
Romania	522.700	810.100	321.600
Slovakia	325.000	450.000	n.a.
Slovenia	196.000	451.800	265.000

Source: KombiConsult, K+P analysis

# Continental Intermodal Traffic and Terminal Strategy

## How can terminal infrastructure be financed?

Slovakian experience: Mr. Marusinec, please ...



# Continental Intermodal Traffic and Terminal Strategy

## Terminal Ljubljana



**New sites and upgraded infra- and superstructure capable for all types of intermodal loading units, not only container but also swap bodies and in particular semi-trailers**

## Availability of loading units (and rolling stock)

- Continental loads transported, currently
  - in curtain side road trains (not in swap bodies), and
  - semi-trailers (non craneable)
  
- Swap-bodies and (craneable) semi-trailers can not be handled in terminals
  - lack of grappler arms/piggy back spreaders with sufficient long arms
  - weight capacity limitation of handling equipment
  
- Bad experiences concerning damage, theft of load, etc. during rail transport due to frequent stops of trains

# Continental Intermodal Traffic and Terminal Strategy

What do we need to get more continental load on track?



# Continental Intermodal Traffic and Terminal Strategy



**Thank you for your attention!**

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Chart 20