

UIC Conference „Growing Intermodal Traffic In CEE Countries“

Wien – 25 March 2010

Panel 3: The Way Forward

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TO YOUR ADVANTAGE.

## KOMBIVERKEHR: THE COMPANY

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### Established 1969

### Shareholder structure

- ⌘ Approx. 230 European freight forwarders and transport companies (50%)
- ⌘ DB Mobility Logistics AG (50%)

### Target customer groups

Freight forwarders and transport companies exclusively

### Range of services

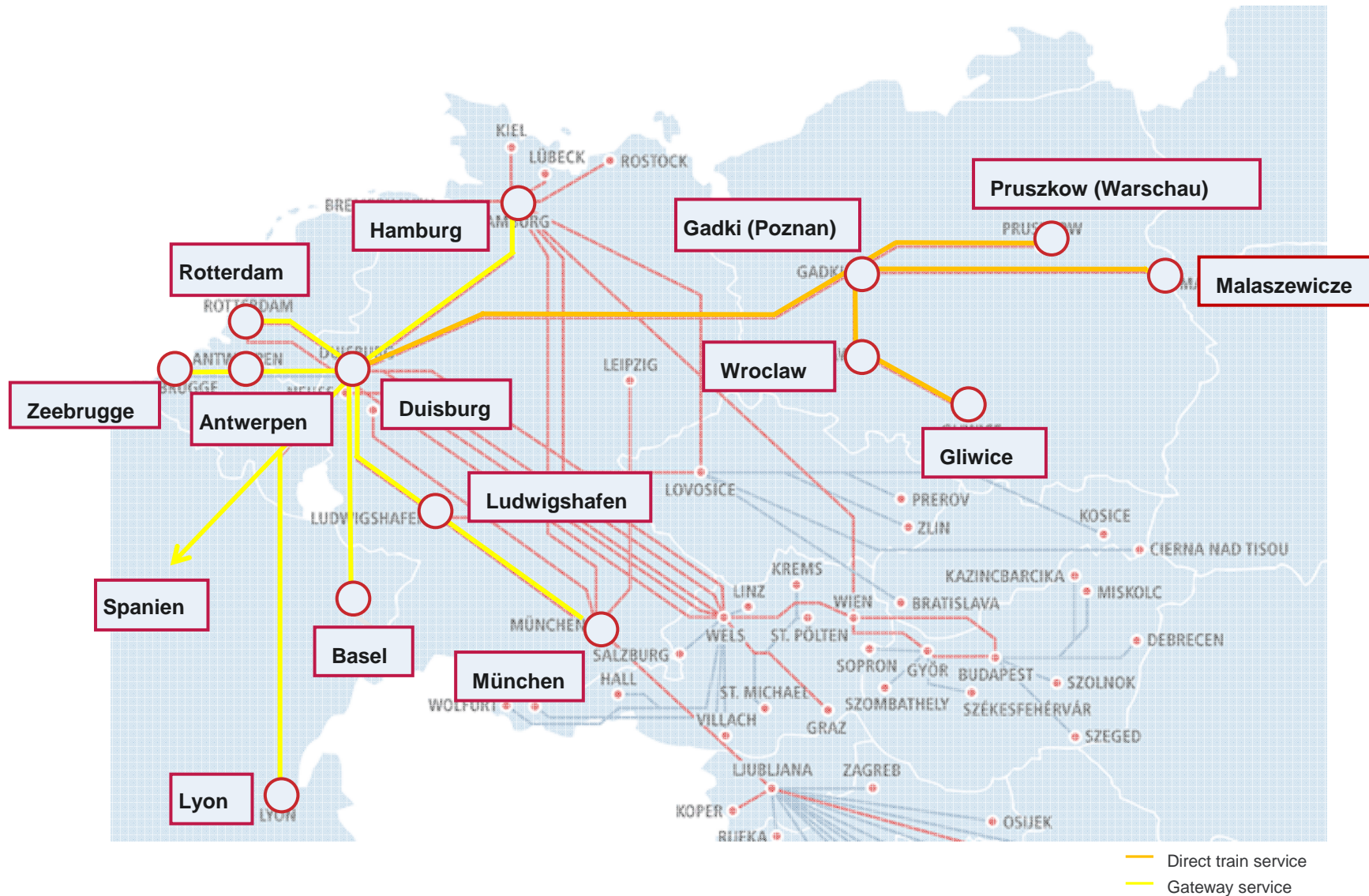
- ⌘ Domestic and international unaccompanied intermodal services
- ⌘ Terminal-terminal services

### Key performance indicators 2008

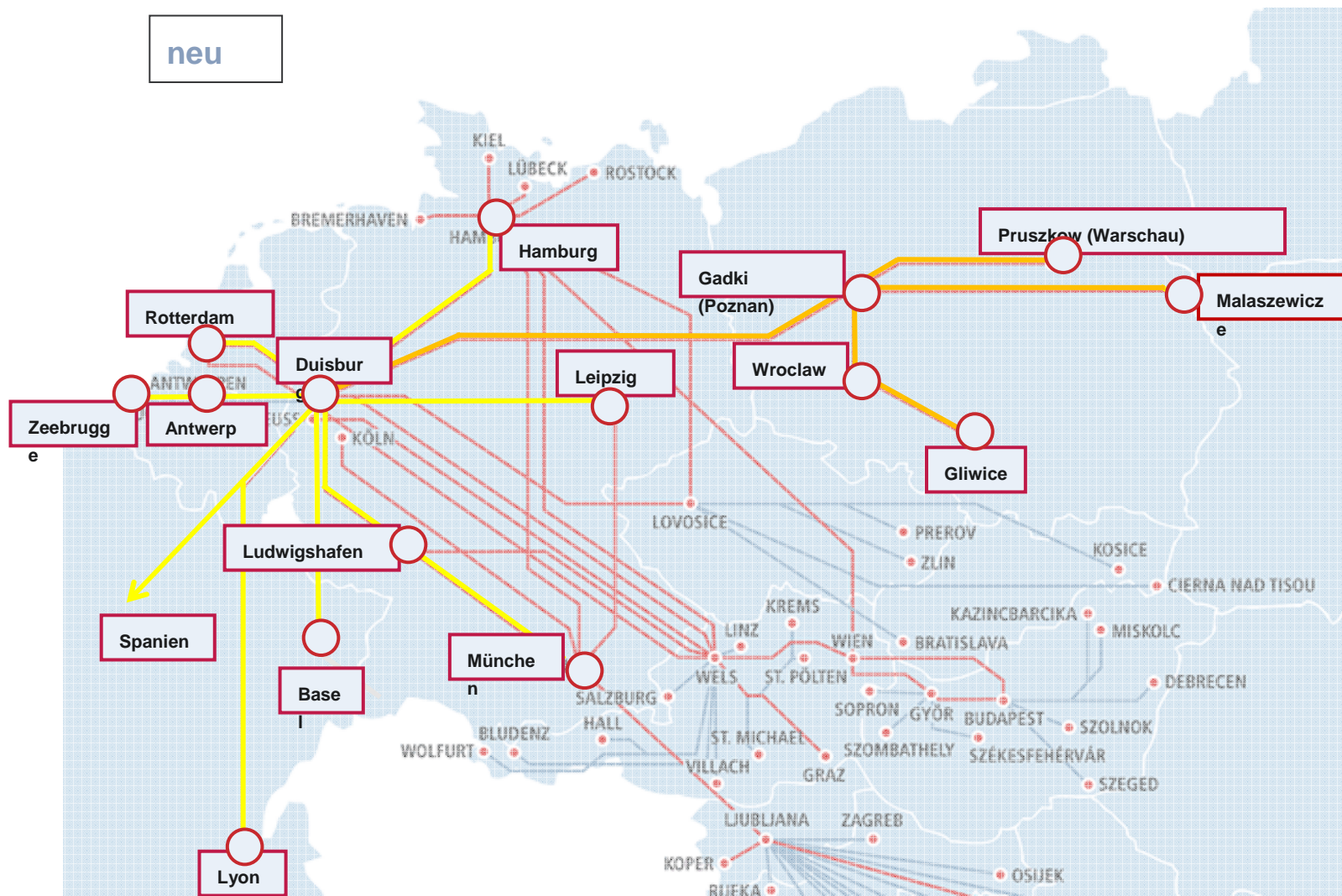
- ⌘ 870 domestic and international block trains per week
- ⌘ 1 million shipments truckload equivalents (2 mTEU)
- ⌘ € 432m revenues
- ⌘ 167 employees



# INTERMODAL SERVICES WITH POLAND

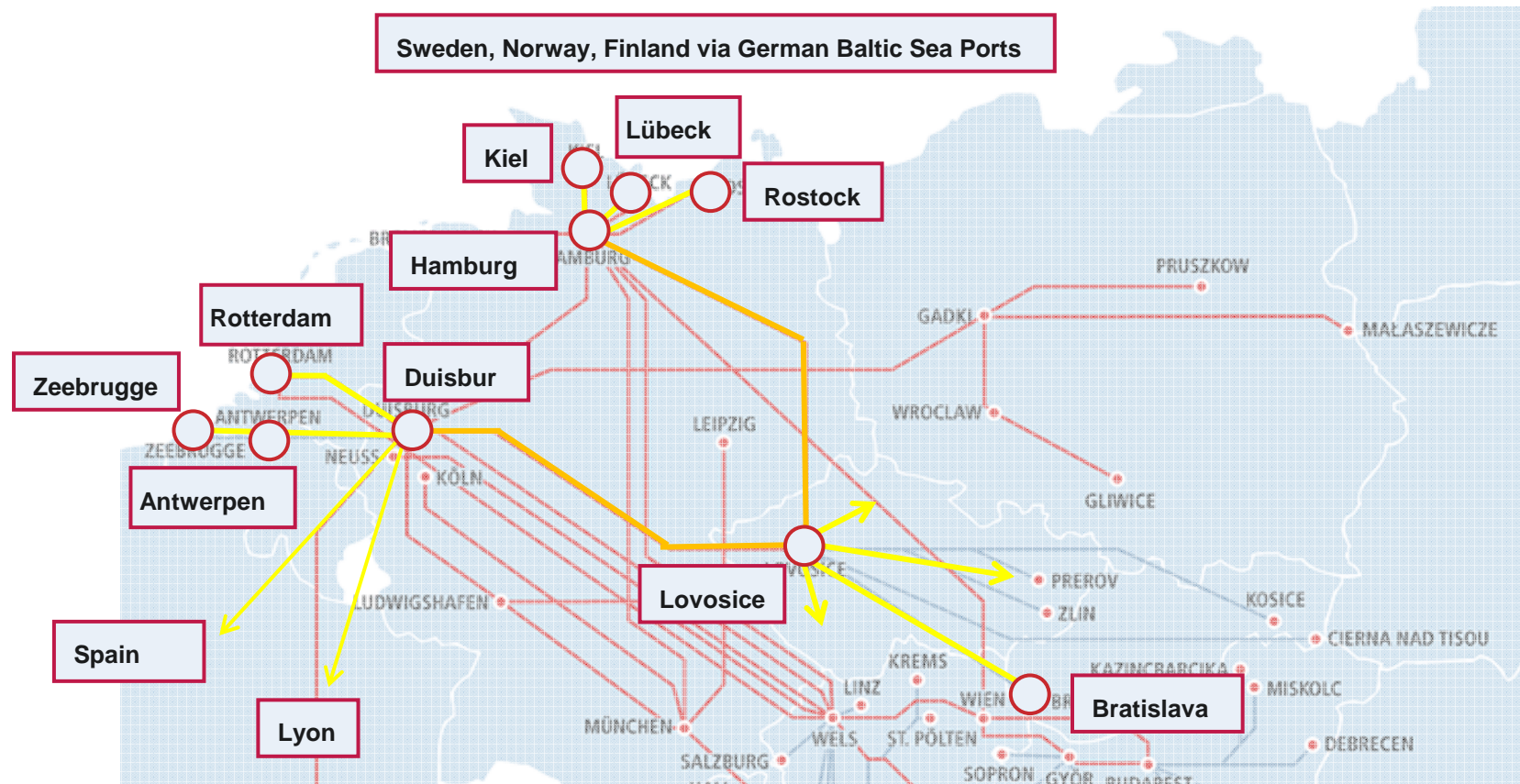


# INTERMODAL SERVICES WITH POLAND



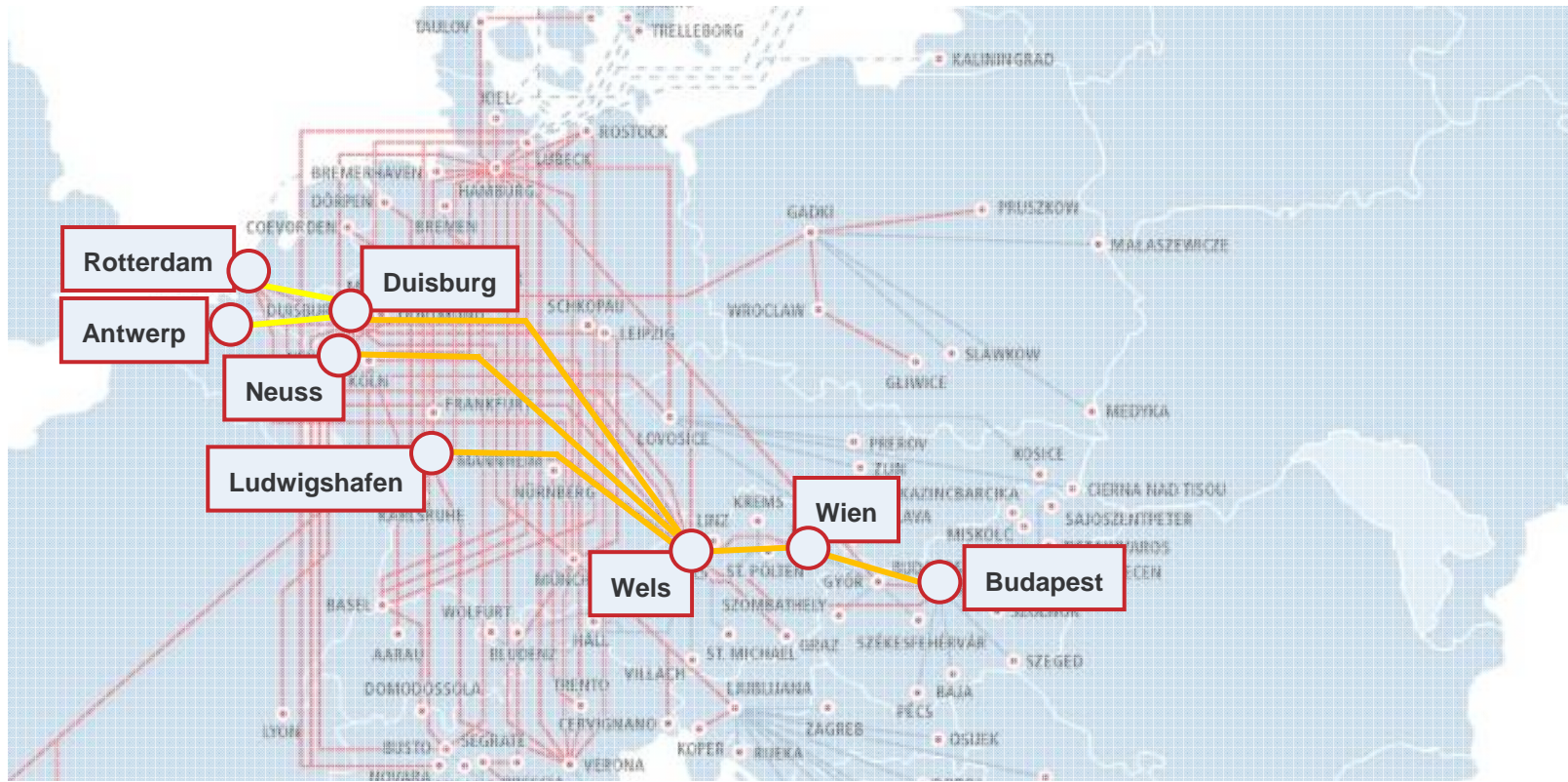
— Direct train service  
— Gateway service

# SERVICES WITH CZECH AND SLOVAK REPUBLIC



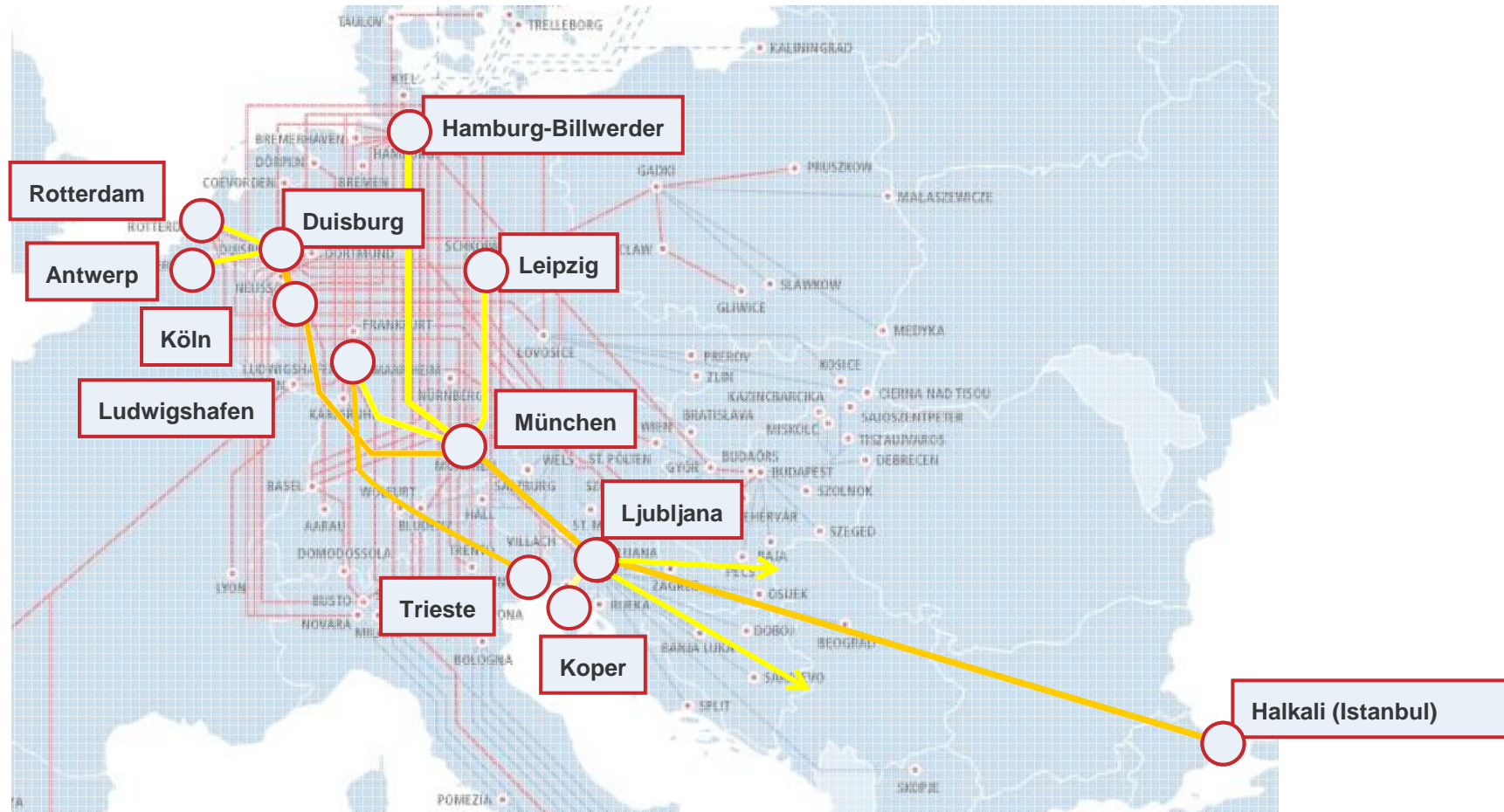
— Direct train service  
 — Gateway service

# SERVICES WITH AUSTRIA AND HUNGARY



— Direct train service  
 — Gateway service

# SERVICES WITH SLOVENIA AND TURKEY



— Direct train service  
 — Gateway service



## WHAT MARKET DEVELOPMENTS DO WE EXPECT?

- ⌘ Increasing east-west exchange of goods owing to European division of labour and demand for consumer goods in CEE countries
- ⌘ Medium-term increase of constraints on road traffic (capacities; fuel cost; drivers; climate policy)
- ⌘ Logistic service providers will become bigger and be more able for using intermodal traffic
- ⌘ Significant increase of demand for intermodal services with Central and South-East European countries once the economic crisis is over

## NEXT STEPS OF EXTENDING NETWORK

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- ⌘ 2<sup>nd</sup> daily service Duisburg–München designed for supplying more capacity for Gateway shipments with Ljubljana (since Feb 2010); 3<sup>rd</sup> daily service in 2011
- ⌘ Increasing frequency of Ljubljana – Istanbul service up to daily departure
- ⌘ Implementation of new Ljubljana – Greece service in 2010
- ⌘ Inauguration of new Antwerp-Duisburg service (April 2010) particularly designed for Gateway transports with south-east Europe
- ⌘ Increasing frequency of Ludwigshafen–Trieste service up to daily departure operated for major Turkish forwarder
- ⌘ Establishment of new services from/to
  - ⌘ Hungary
  - ⌘ Romania
  - ⌘ Bulgaria

## WHAT DO WE REQUIRE FOR?

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- ⌘ Efficient hub terminals such as Wels or Ljubljana are a prerequisite for establishing an extensive network serving all major economic centres in south-east Europe:
  - ⌘ Bundling volumes in the start-up phase
  - ⌘ Allowing to industrialize operations (benchmark: transalpine traffic) by supplying cost-effective and reliable shuttle services with western European terminals and gradually raise the frequency to 2 or more daily departures
  - ⌘ Logistical buffer, also for interim storage.
- ⌘ State-of-the-art intermodal terminals: handling technology, road and rail access, non-discriminatory access; sufficient interim storage areas

## WHAT DO WE REQUIRE FOR?

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- ⌘ Appropriate rail infrastructure to achieve low unit cost: train length and weight and axle load according to “European standard”, P/C 400 loading gauge
- ⌘ Competitive, road-comparable rail infrastructure access prices
- ⌘ High security during rail and at terminals enabling to move consumer goods
- ⌘ Tracking and tracing information

THANK YOU VERY MUCH FOR YOUR ATTENTION!



TO YOUR ADVANTAGE.