



Port-hinterland planning & logistics integration

Alan J. Gibson
Antwerp, 8 June 2011



Agenda

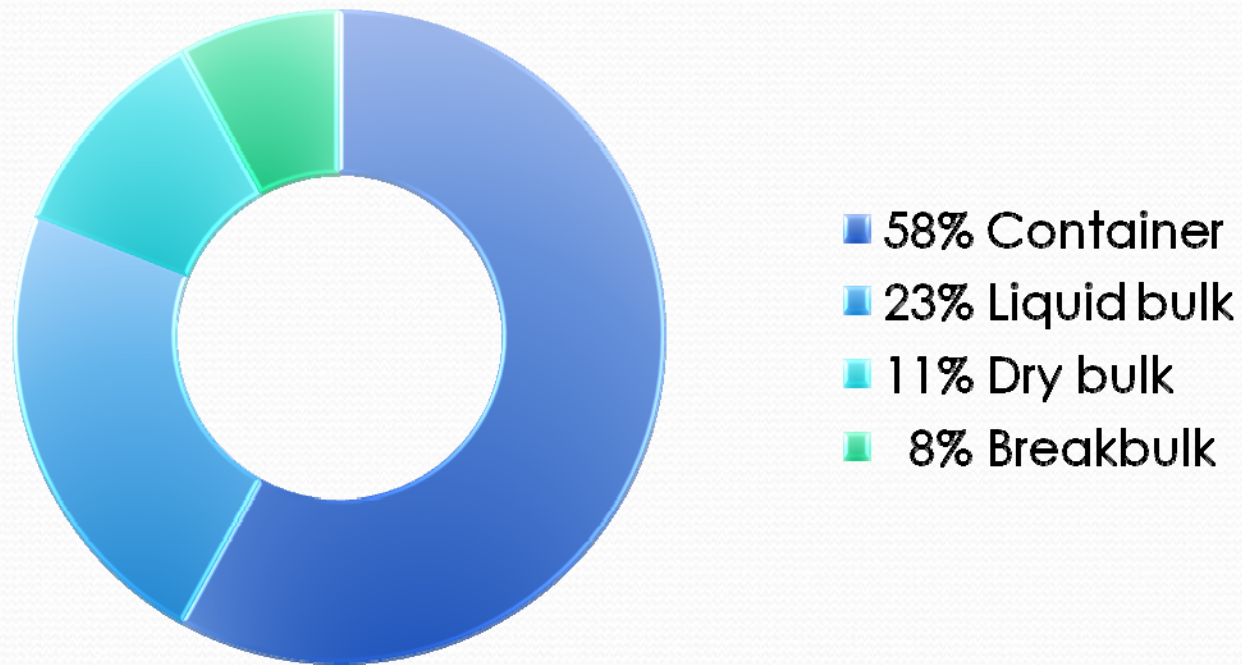
- Introduction
- Commodity & modal split
- Port or inland terminal?
- Extended gateways & transferia
- Rail as the "green" alternative
- Rail assessibility
- Customers' choice?
- Internal barriers

Introduction

- Director Finance, Sea-Land Service
- Director Global Infrastructure
Development, Sea-Land Service
- Director Operations, Maersk
- Managing Director, ERS Railways
- CEO & Owner A1 Consultancy
- Interim Managing Director Captrain & ITL NL,
Captrain BE

Commodity & modal split

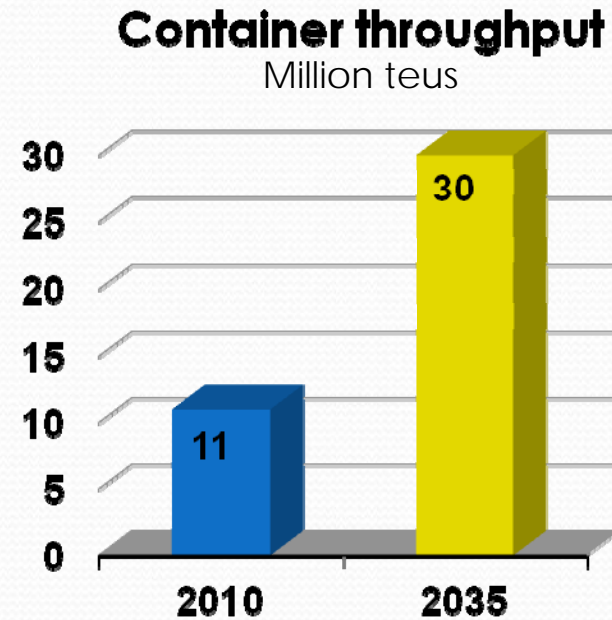
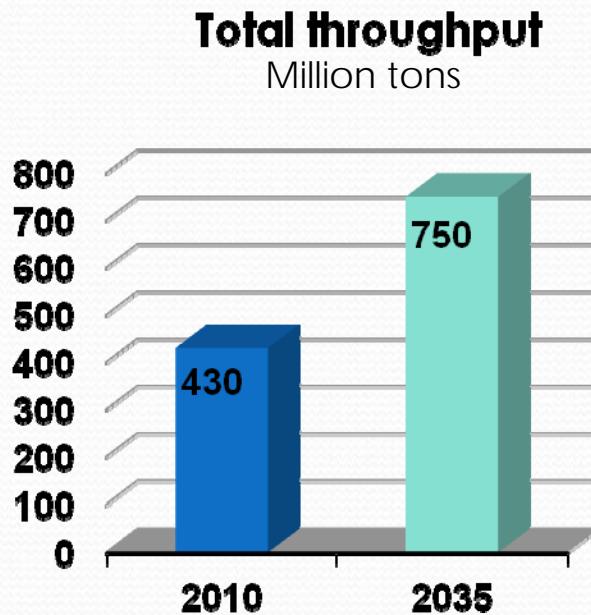
2010 Actual, Antwerp



Source: Port of Antwerp

Commodity & modal split

Forecast Rotterdam



Source: Port of Rotterdam

Commodity & modal split

Rotterdam's modal split <i>(containers only)</i>	<u>2009</u>	<u>2035</u>
Road	48%	35%
Barge	39%	45%
Rail	13%	20%

Source Port of Rotterdam

Port or inland terminal?

Maersk Line verbetert lengterecord in Antwerpen

LIJNVAART

Met zijn 367,25 meter was de 'Georg Maersk' vorige week het langste schip dat ooit de Antwerpse haven heeft aangelopen. Het Deense vaartuig is ruim een meter langer dan de 14.000 teu grote schepen van MSC en vaart in de AE2-dienst van Maersk tussen Noord-Europa en het Verre Oosten, waarin Antwerpen de laatste laadhaven op het Europese vasteland is. In die dienst worden nu ook schepen van 13.092 teu ingeschakeld. De 'Maersk Engfield' wordt als eerste daarvan op 22 juni aan de Deurganck Terminal van PSA verwacht.

'Maersk Elba' breekt record Baltische havens

SCHEEPVAART

De aanloop en behandeling van de 'Maersk Elba' op 11 mei jl. in Gdansk betekent een nieuw era voor de Baltische havens. Het 13.092 teu metende containerschip is het grootste ooit behandeld in een Baltische haven. De 'Maersk Elba' is een van de 11 super post-Panamax containerschepen die de Maersk line op haar AE10 dienst, die China met Noord-Europa verbindt, wil inzetten. Acht schepen van elk 15.500 teu, momenteel de grootste containerschepen ooit, zullen naast 3 schepen van elk 13.000 teu, waaronder de 'Maersk Elba', de AE10 dienst verzekeren.

Source: Railway Pro

Port or inland terminal?

- Sea port or inland port b/l?
- Move box as close to customer as possible for quick delivery
- Consultant advising consignees to reduce the size of their warehouse : use the port terminal to store goods!

Extended gateways & transferia

Port of Rotterdam's transferia

- Alblasserdam
- Alphen a/d Rijn
- Wanssum

Rotterdam's extended gates

- Duisberg
- Moerdijk
- Venlo

Extended gateways & transferia

Port Antwerp's transferia

- WCT Meerhout
- Beverdonk
- TCT Willebroek

Port of Antwerp's hinterland hubs

- LAR Kortrijk
- Moeskroen
- Athus



Rail as the green alternative

- Rail is “Oxygen” for ports

Source Global ports strategies discussion forum, LinkedIn



Rail as the “Green” alternative

- Rail freight is the eco-friendly solution to transport more goods in a better way for the climate.

A study conducted by the UIC shows that CO₂ emissions are eight times less than the road.

Rail as the “Green” alternative

POLICIES & STRATEGIES

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European Commission approves the White Paper on Transport

By 2030, 30% of the road freight transport on distances longer than 300 km should be transferred to other means of transport, such as railways

[by Elena Ilie]

Source: Railway Pro



Rail accessibility

Hamburg

- Limited accessibility to last mile, wagons marshalled at Marchen.

Rotterdam

- Diesel & e-locs can drive up to gate of most terminals.

Antwerp

- Last mile accessible by diesel locs

Rail accessibility

- Unique connectivity of Rotterdam to its hinterland with 160 kms of track exclusively for rail freight.

In 2011 forecast is 500 trains/week.

Source Port of Rotterdam



KEYRAIL

Betuweroute
Operating Company



Rail accessibility

Progress made in making Antwerp more open:

- A few tanking locations are now open to companies other than the incumbent.
- Three R&M facilities are in the process of being established in Antwerp, that will be open to all railway companies. Hitherto, only the incumbent had access to such facilities.

Rail accessibility

Infrastructure remains a challenge in Antwerp:

- Access to port tracks are often blocked for up to 1 hr) by the operator that arrives first.
- Most terminals have short tracks obliging operators to perform a lot of extra shunting.
- To reach the northern part of the port is only single track (1 path available each 1/2hr, alternative is a difficult trip through the locks.

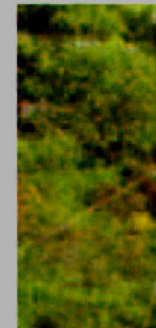
Customers' choice

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POLICIES & STRATEGIES

Bulk freight chooses railway transport

Railway transport is the transport mode that manages to face the challenges of the bulk freight transfer most optimally. It cannot compete with the other means of transport from the point of view of either shipped volumes or travel times and costs.



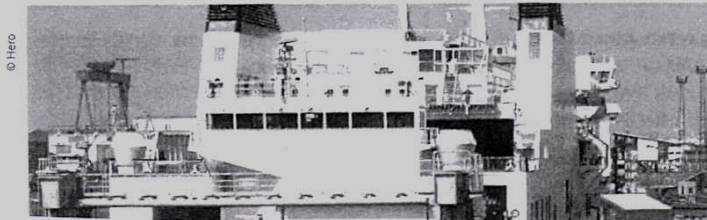
Source: Railway Pro

Customers' choice

TREINAS NOORD-ZUID

Scandria moet meer lading op trein brengen

Zweden, Denemarken en Duitsland zijn van plan gebruik te maken van deze groene corridor om meer spoorvervoer te gebruiken tussen de Baltische en de Adriatische Zeeën.

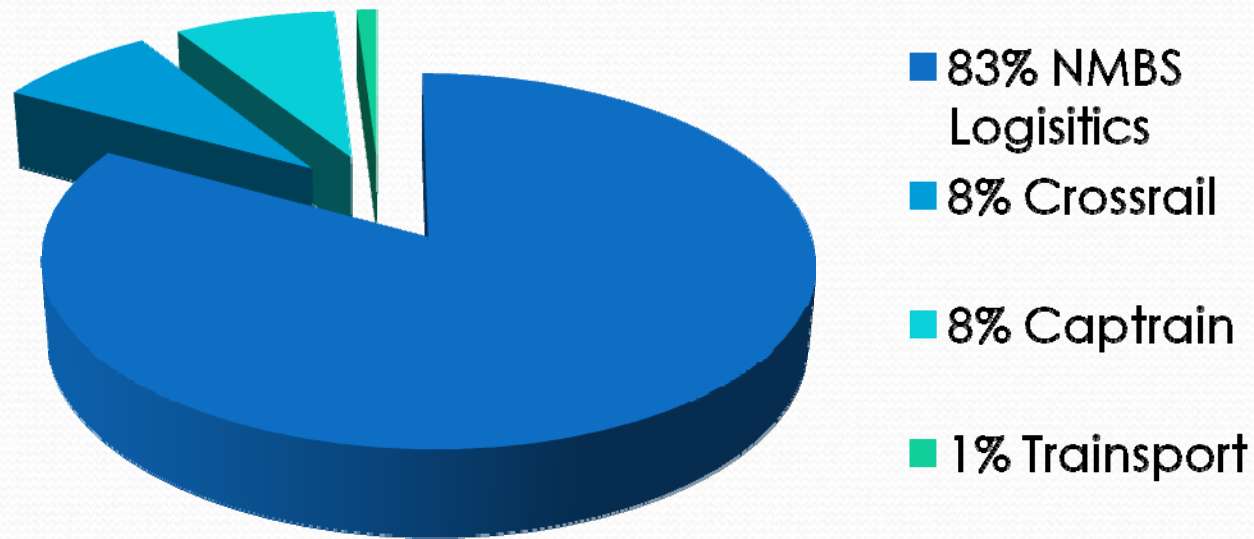


nerbasistunnel een sleutelement zal worden voor die noord-zuidcorridor. Daarbij moeten ook de bouw van de hogesnelheidslijnen Berlijn-Nuremberg, Copenhagen-Ringsted en Berlijn-Dresde, en de uitbreiding van de ferrydiensten tussen Rostock en Gedser en tussen Sassnitz en Trelleborg een belangrijke

Source: De Lloyd

Internal barriers

- Dominant position of incumbent in local market eg. Belgium



Source: Port of Antwerp

Internal barriers



A customer who wants the best deal will ensure that the terminals are open to all operators, so that he can get competitive bids from several rail freight companies. In many cases, it is best for the customer to own and operate the terminals so that he has control and can change operators in the event of poor quality”,

**Lord Tony Berkeley,
President Rail Freight
Group**

Source: Railway Pro



Internal barriers

all over Europe. Despite the railway liberalisation policy supported by the European Commission, it is still inefficient in many countries”, said Patrick Verhoeven, the Secretary General of the European Sea-ports Organisation (ESPO) in an interview last year.

Source: Railway Pro

Internal barriers

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Cross-acceptance procedures, roles and responsibilities are different in every country

In April, the European Railway Agency (ERA) published the first part of a major report on the authorisation of railway vehicles. The report describes the current situation referring to the authorisation of the railway vehicles running on the European network.



[by Elena Ilie]

EU and internationally) but is in its infancy for rail at European level.

The networks of Europe have, in the past, been built to different specifications. These differences cannot be quickly or cost-effectively engineered away. Furthermore, most of the Member States have not yet put in place and published the Technical Rules which...

Source: Railway Pro

Internal barriers

<p>'Price Tag' reality in rail freight</p>		
Acquisition cost traction engine	300.000 €	3,5 mio €
Acquisition cost multi-country traction engine	300.000 €	4-5 mio €
Lead-time engine (order -> delivery)	6 months	12-24 months
Countries covered by request for homologation	27	1
Cost range for 1st homologation	60.000*	1 mio € – 2 mio €
Time frame for 1st homologation	< 6 months	> 18 months
Time frame for 2nd homologation (cross-accept)	0	< 18 months

Closing remark

- Will you be able to move your freight around Europe when the roads are even more congested, oil prices have rocketed, and there are more restrictions on road drivers' hours, and road user charging is the norm?

Source: Railway Pro



Thank you

Alan J. Gibson
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