Rail Cargo information Netherlands

Retrack seminar

Trends in Dutch rail transport

Max Philips

Delft, September 3, 2008

making the connection

What is Rail Cargo information Netherlands?

An independent information office on rail freight transport (non-commercial basis)

Our goal: **stimulate the use of rail transport**

Target groups:

- Shippers = producing companies;
- Freight Forwarders / Logistical Service Providers;
- Shipping Lines;

61 participants

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1. Railion Nederland
2. ACTS Nederland
3. Rail4chem
4. Veolia Cargo Nederland
5. ERS Railways
6. ITL Benelux
7. Rotterdam Rail Feeding
8. VolkerRail
9. Strukton railinfra
10. Voestalpine RailPro
11. HUPAC Intermodal
12. Optimodal
13. DistriRail
14. Rail Service Center Rotterdam
15. Rail Terminal Tilburg
16. Cabooter Railcargo Venlo
17. De Vries Transport Group
18. Ceres Paragon
19. ECT
20. Infra Safety Services
21. Alstom
22. RailRelease
23. ProRail
24. Keyrail
25. Ewals Cargo Care
26. Wetron
27. Van den Bosch Transporten
28. Bas Logistics
29. GTM Maastricht
30. Agility Logistics
31. Van der Vlist Moerdijk
32. NTM Rail & Road Logistics
33. Trimodal Europe
34. Railco
35. Global Intermodal
36. Intermodal Solutions
37. Cross Limits Logistics
38. Movon' Logistics
39. EVO
40. Nederland Distributieland
41. Havenbedrijf Rotterdam
42. Haven Amsterdam
43. Groningen Seaports
44. Havenschap Moerdijk
45. Zeeland Seaports
46. Rail Development Partners
47. Spoorflex
48. Rail Training
49. Wagon Care
50. MRCE
51. Ox-traction leasing company
52. Electro-Motive Diesel Inc.
53. Customs Support
54. DeltaRail
55. Logitech
56. ABN AMRO
57. Spitzke Spoorbouw
58. TOP Group International
59. Transport en Logistiek Nederland
60. Bonder Recycling
61. Ministry of Transport

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Our activities:

- Help desk;
- Presentations;
- Brochures;
- Individual visits;
- Conferences & Fairs;
- Website;

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Goal of this seminar:

"...bring a contribution to the discussion on how to make trans-European rail freight transport a success."

Trends in Dutch rail transport

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Trends in Dutch rail transport

- Open market for new entrants

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New entrants

- 1938 NS Cargo → RAILION DB Logistics
- 1998 ACTS Short Lines *(gestaakt in 2004)*
- 2002 ERS Railways
- 2003 DLC Railway RAIL4CHEM Eisenbahnverkehrsgesellschaft mbH
- 2004 HGK
- 2005 RRF Rotterdam Rail Feeding
- 2006 VEOLIA ENVIRONNEMENT
- 2007 B CARGO SNCF CTL LOGISTICS ITL Rurtalbahn

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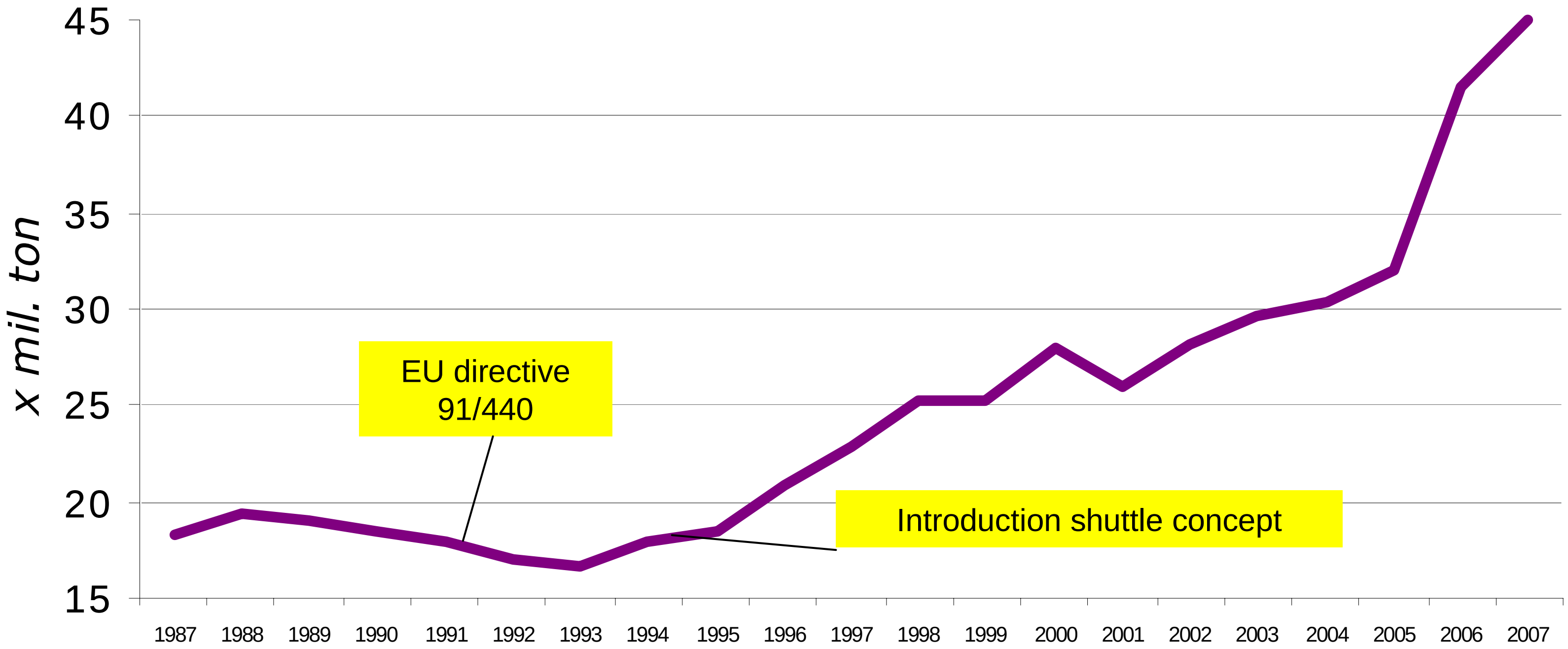
Trends in Dutch rail transport

- Open market for new entrants
- Growth in volume

Strong growth in volume
(2007: 43 million tonnes)

Forecast 2020: 90 mil.



Road:	641 million tonnes
Barge:	260 million tonnes
Shortsea:	250 million tonnes

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Competition versus Growth in traffic

- Great Britain 1998-2008 + 60%
- Germany 1997-2007 + 55%
- The Netherlands 1997-2007 + 85%

European Commission letters of Formal Notice regarding implementation of the First Railway Package, June 2008

Country	a	b	c	d	e	f	g	h	i	other
Austria	●	●	●							
Belgium	●	●		●			●			
Britain										●
Bulgaria		●	●	●						●
Czech Republic		●	●		●	●		●	●	●
Denmark		●		●			●		●	●
Estonia					●	●			●	●
Finland		●	●						●	●
France		●		●				●	●	●
Germany	●							●		
Greece	●	●		●			●	●	●	●
Hungary		●			●			●		●
Ireland		●						●		●
Italy	●		●	●					●	●
Latvia			●	●	●		●		●	●
Lithuania		●	●				●	●	●	●
Luxembourg		●	●	●	●		●		●	
Poland	●							●		●
Portugal		●				●	●			●
Romania				●			●			●
Slovakia			●			●		●		●
Slovenia		●	●	●	●		●	●		●
Spain		●	●	●		●	●		●	●
Sweden		●								●

Key:

a. Insufficient safeguards to guarantee the independence of the IM from the railway holding in the exercise of its essential functions
b. Absence of implementation of a performance scheme to encourage operators and the IM to minimise disruption and improve performance
c. Regulatory body does not have sufficient powers
d. Insufficient independence of the regulatory body from the (incumbent) operator and/or IM
e. Some essential functions are still performed by the (incumbent) operator
f. Insufficient management independence of the (incumbent) operator
g. Insufficient accessibility of regulatory body
h. Insufficient incentive for IM to reduce costs and levels of access charges
i. Insufficient powers and resources to the regulatory body to monitor competition in the rail services market

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Trends in Dutch rail transport

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- Setting up of new rules (f.i. parking fees, bonus-malus schemes)

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CTL gaat containers vervoeren voor Schavemaker

CTL Logistics, de grote Poolse spoorvervoerder, heeft een contract gesloten met het Nederlandse Schavemaker en het Duitse Willy Petersen.

CTL vervoert sinds kort containers drie maal per week van de terminal in Frankfurt aan de Oder naar de Schavemaker Carg-terminal in het Poolse Katy Wroclawskie. De dienst wordt uitgevoerd met locomotieven die zowel op Duits als op Pools grondgebied mogen rijden.

Met de containers worden onder meer onderdelen voor de productie van televisietoestellen vervoerd. Aan Poolse kant worden de containers gelost en vervolgens geladen voor de terugreis.

CTL Logistics is in 1992 opgericht als Poolse particuliere spoorwegmaatschappij die vooral actief is in het vervoer van chemische goederen. Het bedrijf, inmiddels ook in Nederland actief, behoort nu tot de grootste spoorvervoeraanbieders in Europa.

CTL beschikt over 170 locomotieven, 5.000 wagons en 138 kilometer eigen spoor in Polen. Het bedrijf kan met eigen vrachtauto's fijnmazige distributie in Polen verrichten en is bovendien goed thuis in het spoorvervoer in Oost-Europa en Rusland.

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- Need for cooperation to create critical mass
- Increasing frequencies of existing shuttle trains

Increasing frequencies (2008 vs. 2007)

For example:

• Hupac	R’dam – Mannheim	5 -> 6	per week
• Hupac	R’dam – Hamburg	3 -> 5	per week
• DistriRail	R’dam – Duisburg	6 -> 11	per week
• NYK	A’dam – Duisburg	4 -> 5	per week
• ECT	R’dam – Venlo	15 -> 18	per week

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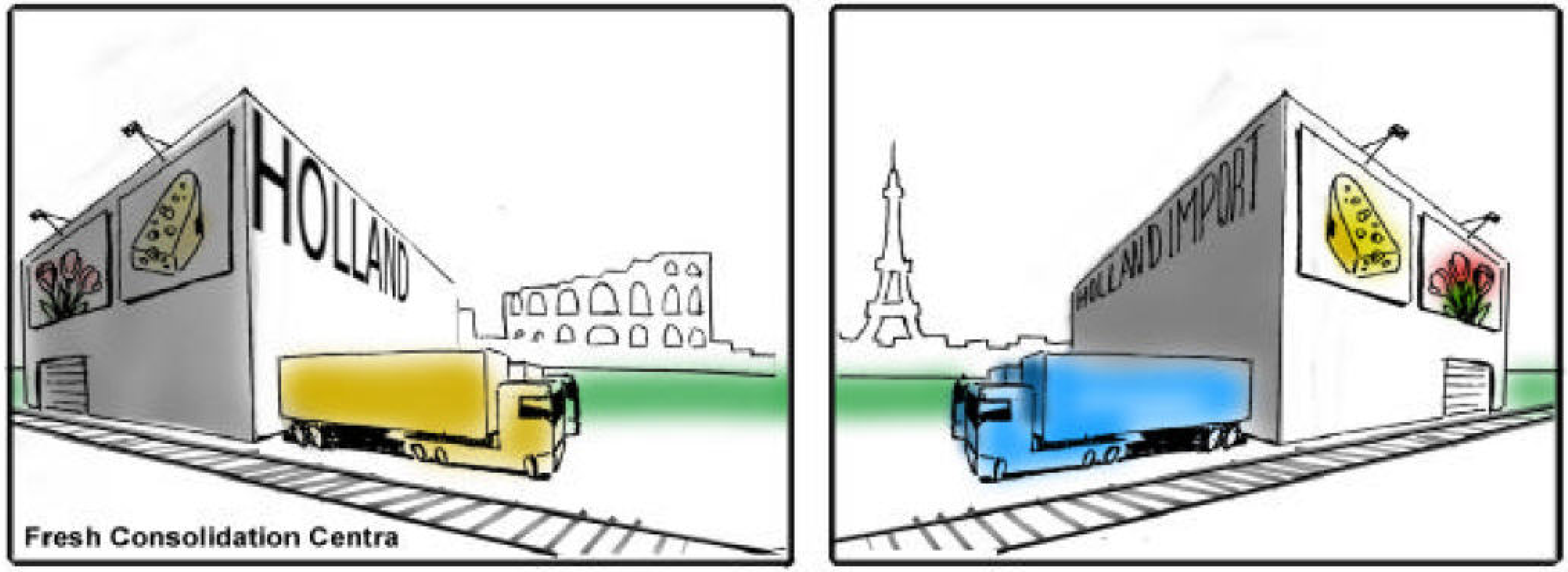
- New market segments (a.o. fresh logistics)

Illustratie 9: Fresh Consolidation Centra nabij verschillende Europese steden



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- Mergers and take-overs

Mergers and take-overs

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- June '07 RAILION DB Logistics buys EWS
- Okt. '07 crossrail buys DLC Railway
- Nov. '07 Bridgepoint buys CTL LOGISTICS
- Feb. '08 VEOLIA ENVIRONNEMENT buys RAIL4CHEM Eisenbahnverkehrsgesellschaft mbH
- April '08 SNCF buys ITL
- April '08 joint-venture RAILION DB Logistics + Rail Cargo Austria Ein Unternehmen der ÖBB
- April '08 GENESEE G&W WYOMING buys RRF Rotterdam Rail Feeding
- July '08 joint-venture RAILION DB Logistics + green cargo

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- Dynamic leasing market

Dynamic leasing market rolling stock

- April '08 Merger of MRCE and MRCE dispolok
- June '08 angel Trains sold to BABCOCK & BROWN
- June '08 ALLCO FINANCE GROUP sold to MUFG BTMU Capital Corporation
- Juli ''08 launch of www.Ox-traction.com
- Aug. '08 launch of RAILPOOL FLEXIBILITY FOR RENT by HSH NORDBANK and kfw IPEX-BANK

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- New services to CEE countries

New services to CEE

- R'dam – Kutno Poland 5 x per week
- R'dam – Slawkow Poland 3 x per week

- R'dam – Romenia ????

The challenge of Retrack

- Building a new services based on proven market interest.
- By working together with numerous parties
- With private operators

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Contact details

Address:

Koddeweg 37
3194 DH Hoogvliet-Rotterdam
T: +31 (0)10 2042111
F: +31 (0)10 2042112

Your contacts:

Max Philips
E: philips@railcargo.nl

Gilbert Bal
E: bal@railcargo.nl

Suzan van Waardenburg
E: waardenburg@railcargo.nl

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