

MARKET PLACE SEMINAR, ISTANBUL 2009, 22 – 23 OCTOBER

Intermodal solutions between Europe and Turkey

Armin Riedl, Kombiverkehr KG



TO YOUR ADVANTAGE.

Frankfurt am Main, Oktober 2009

## KOMBIVERKEHR: THE COMPANY

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### Established

1969 based in Frankfurt Main

### Target group

Freight forwarders and transport companies exclusively

### Range of services

High-quality terminal-terminal connections in  
European road-rail combined transport

### Key statistics

- Over 870 national and international direct and shuttle trains per week
- On average more than 160 direct and shuttle trains per transport day
- Over 15,000 daily Gateway connections
- 1, 021,703 truck consignments transported (2008)
- EUR 432 million sales revenues (2008)
- 167 employees (31 December 2008)

>> We show  
impartiality towards  
our customers



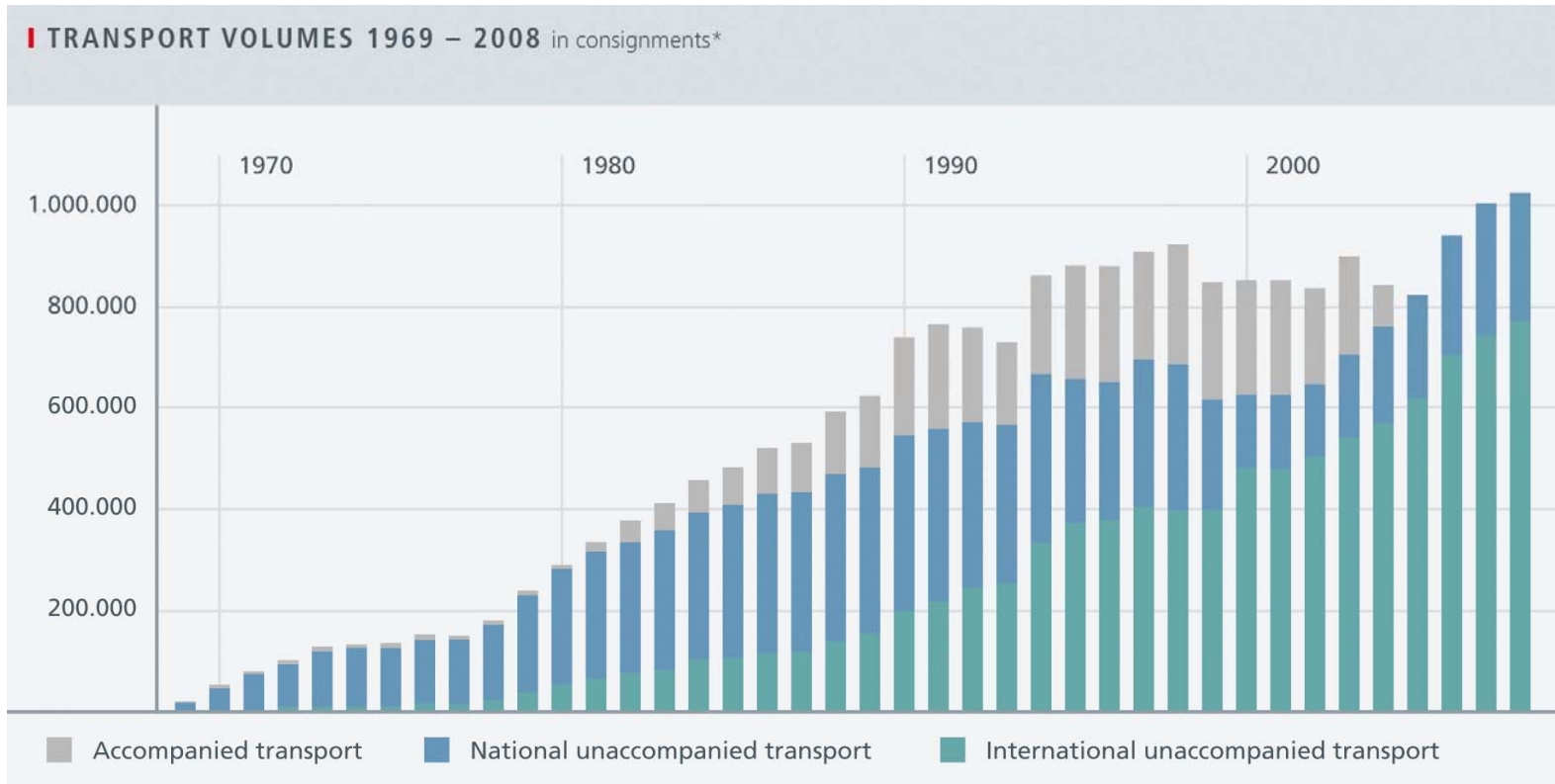
>> No offer to  
producing industry



>> No door-to  
door transport



## Transport volumes 1969 - 2008

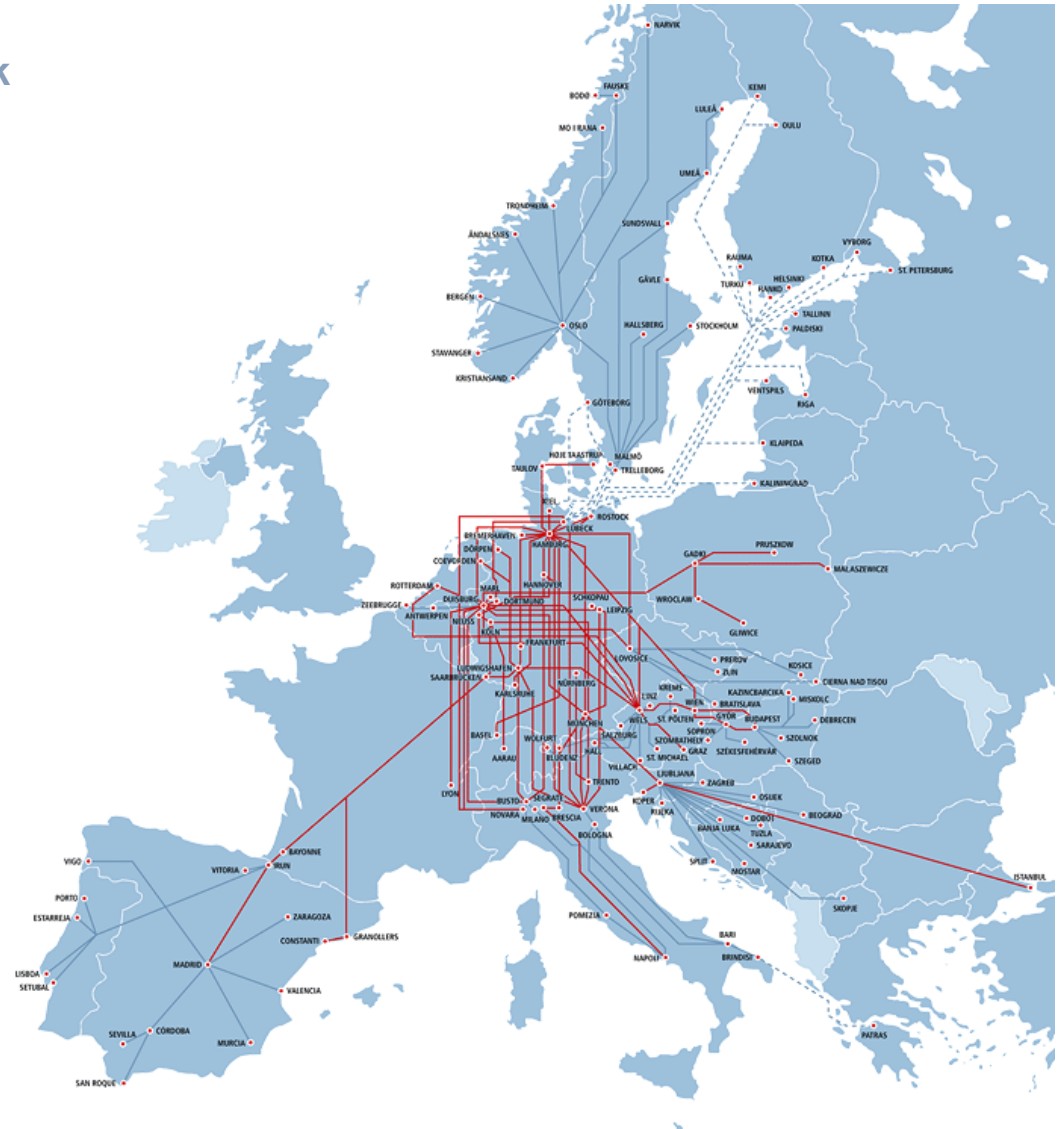


\* One consignment is equivalent to the capacity of a tractor-trailer or articulated truck.

## European block train network

- Over 550 international direct train services per week

- Direct train services
- Satellite services
- Ferry services



## GROWTH MARKET TURKEY

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- Turkey is an important trading partner for Europe – in particular for Germany.
- Turkey has an advantageous position between Europe and Asia, giving it an important transit function.

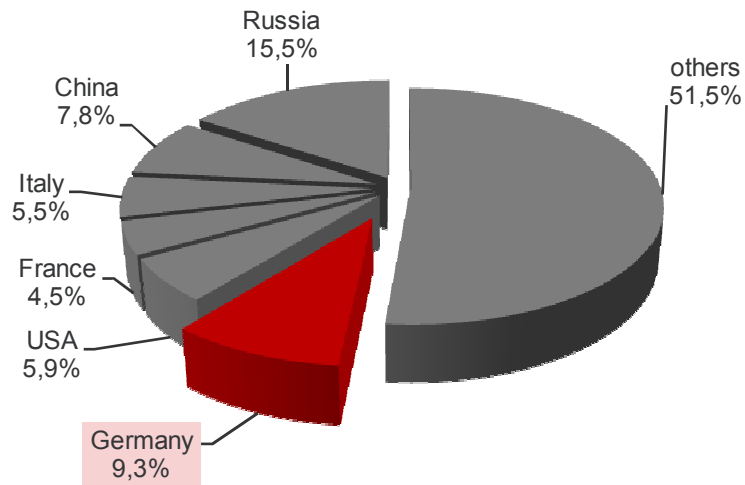


## BASIC PARAMETERS

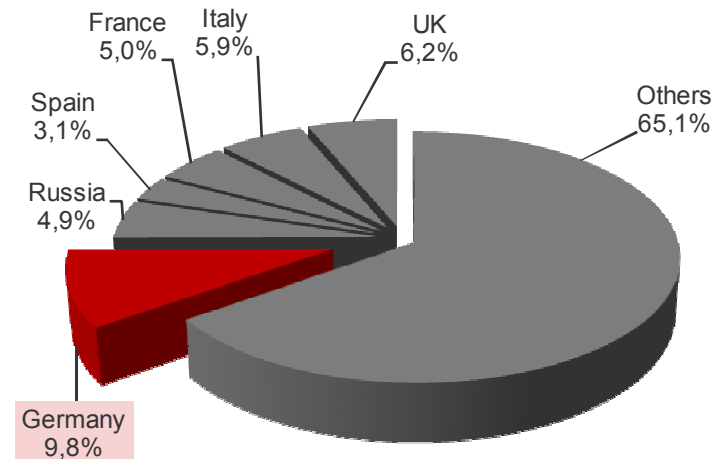
### ECONOMIC RELATIONS

- Germany is one of Turkey's most important trading partners. The balance of trade between Turkey and Germany is nearly equalized.

**Main supplier countries of Turkey 2008**



**Main customer countries of Turkey 2008**

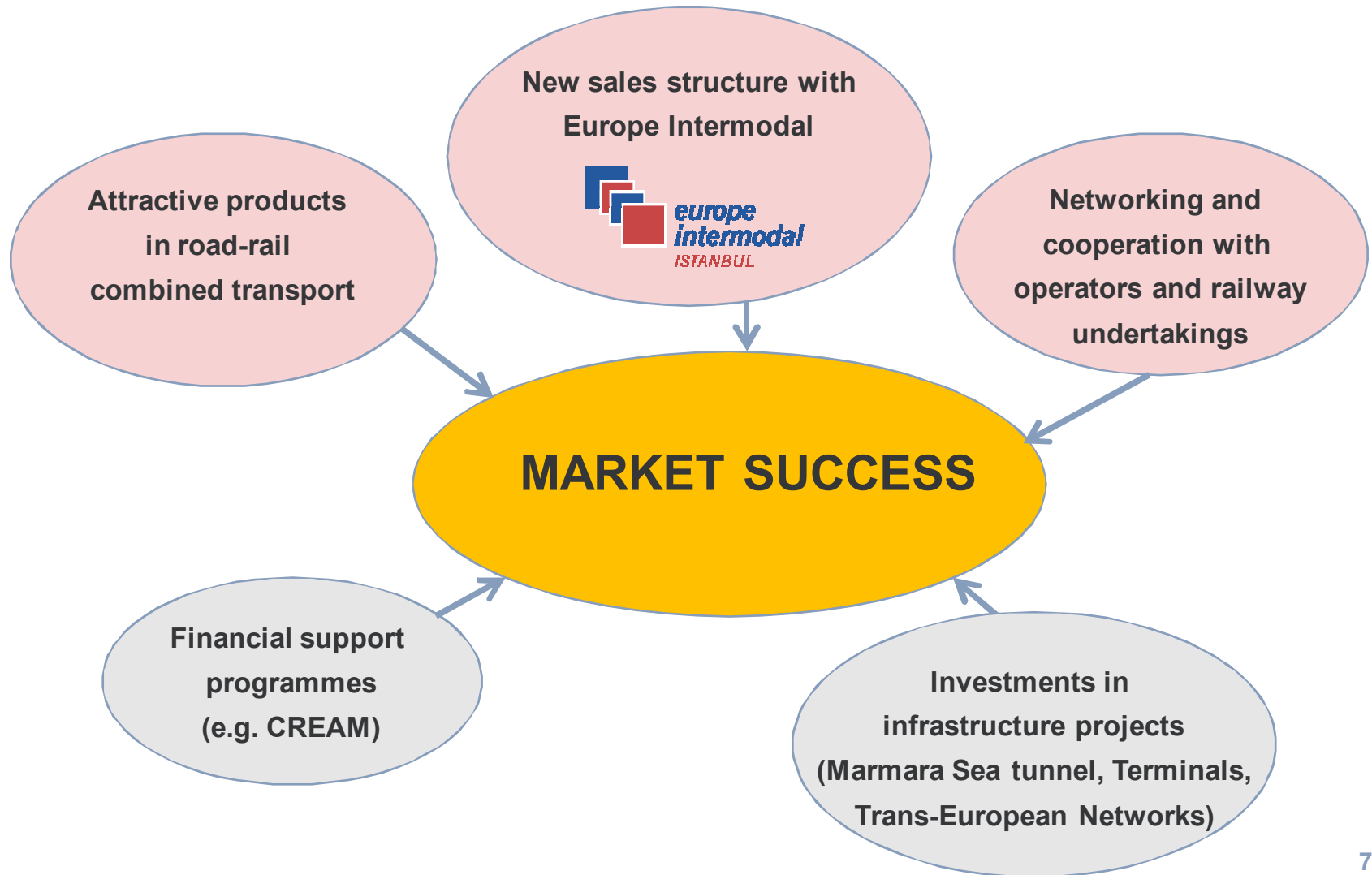


## RISC FACTORS FOR RAIL FREIGHT SOLUTIONS

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- Compared to EU standard, Turkey's railway infrastructure is not much developed.
  - Only about 20 % of the rail lines are electrified.
  - Only about 24 % of railway infrastructure are provided with signalling systems.
  
- About 95 % of national goods transports are done by road.
  
- Turkey's international goods transports are mainly done by sea.
  
- The rail system has been neglected in the past.
  
- Only a few big distribution centres and modern multimodal terminals with networking between rail, road and air freight
  
- Using rail solutions between Western Europe and Turkey: numerous countries with different technical conditions (power supply, signalling systems, profiles)

## MEASURES TO ENHANCE MARKET ACCEPTANCE





## RAIL FREIGHT SERVICES GERMANY – TURKEY v.v. IN UNACCOMPANIED ROAD – RAIL COMBINED TRANSPORT

High potential and promising growth opportunities in a new market segment, due to

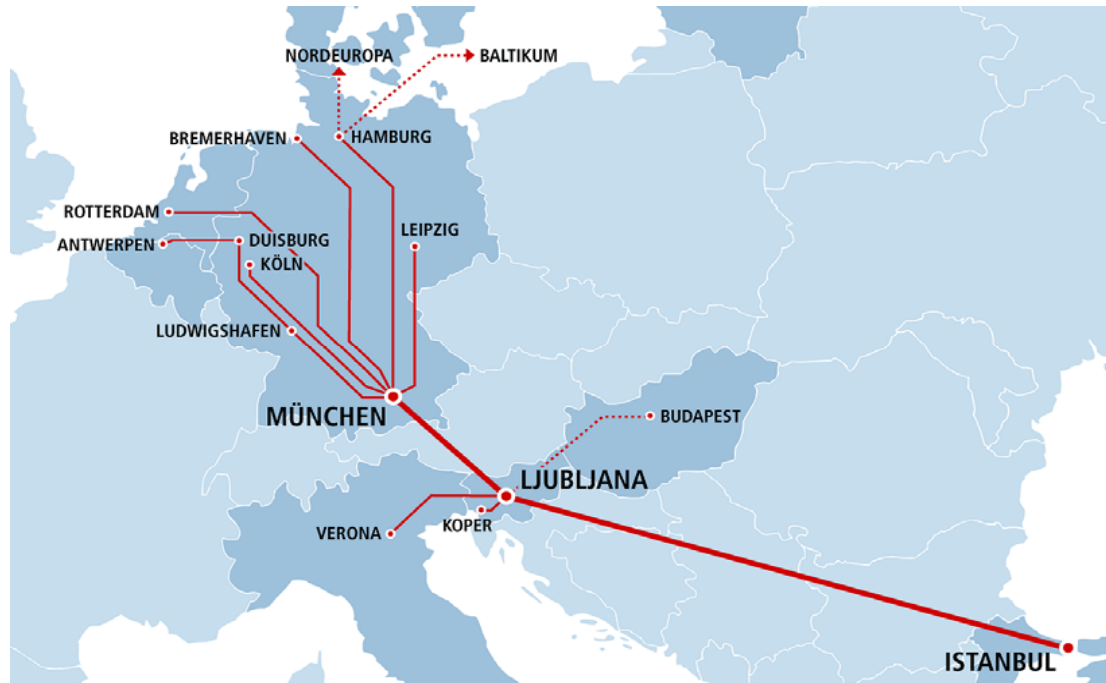
- long haulage distances
- short transport times
- balanced traffic flows
- high quality

## RAIL FREIGHT SERVICES GERMANY – TURKEY V.V.

### ROUTING VIA LJUBLJANA IN COOPERATION WITH **ADRIA KOMBI**

#### ■ **BOSPORUS-EUROPE-EXPRESS**

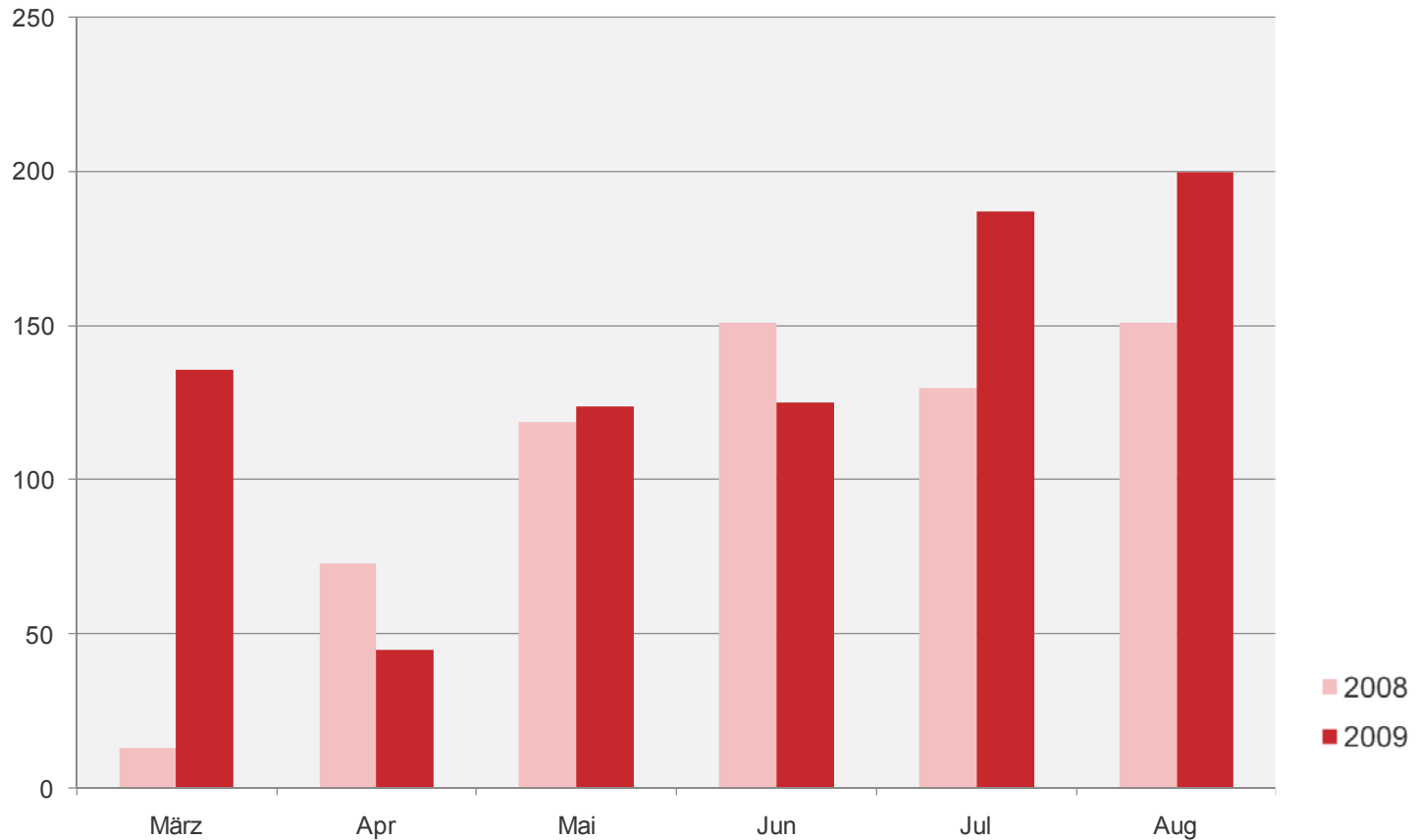
- Munich – Ljubljana – Halkali (Istanbul) v.v.
- With connection to the national and international networks of Adria Kombi and Kombiverkehr
- With connection to the networks of partner companies as Hungaria Intermodal or Cargonet
- Shorter transit time compared to road transports
- Start: March 2008



## BOSPORUS-EUROPE-EXPRESS

Transport volumes in consignments March – Aug. 2009 / March – Aug. 2008: + 28 %

consignments



## ROUTING VIA TRIESTE E

### ■ Mannheim – Trieste v.v.

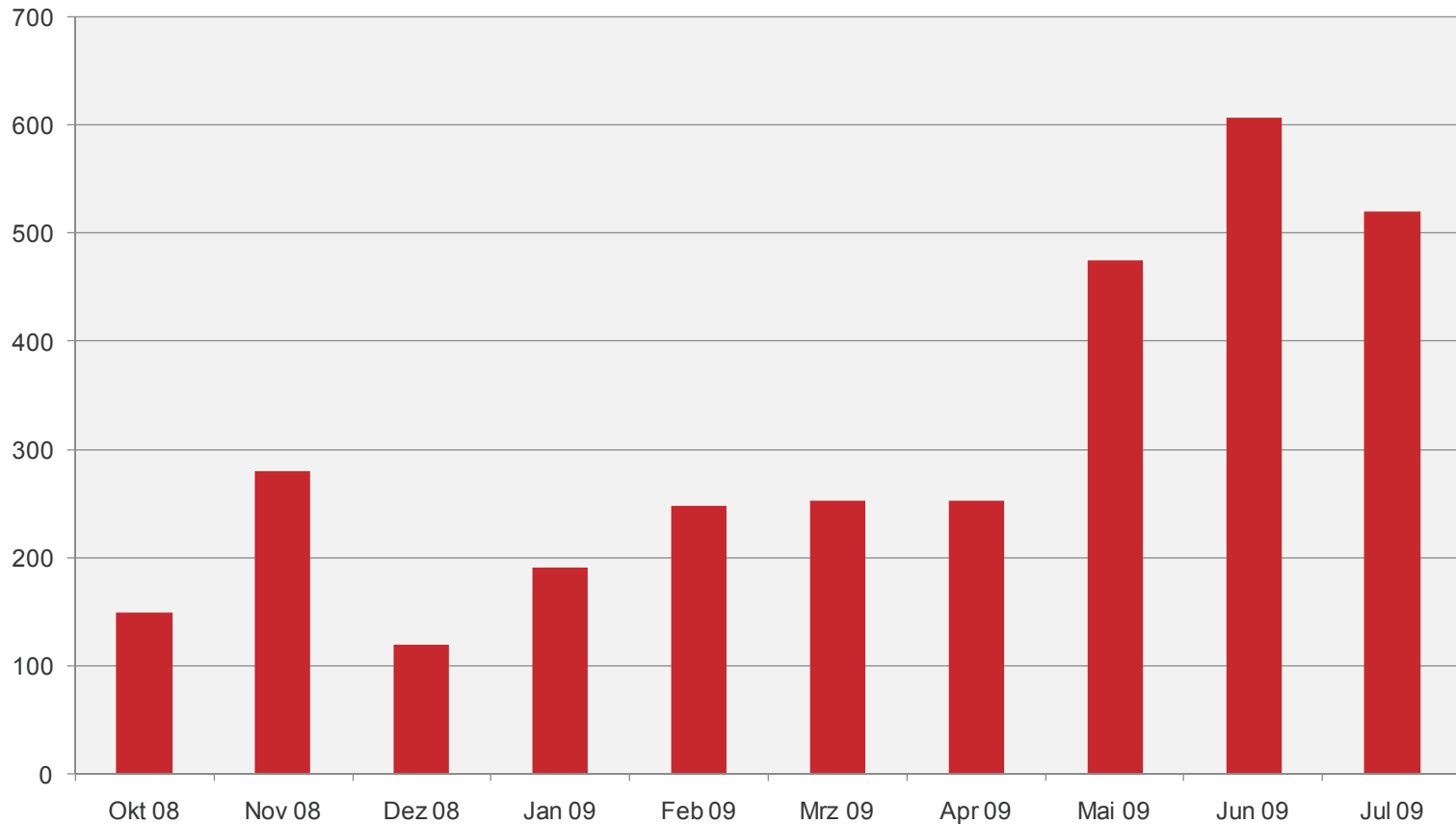
- Forwarding from Trieste by sea
- Start: October 2008
- Service temporarily stopped in August 2009 because of operational problems
- New start of service is planned in November



**MANNHEIM – TRIESTE v.v.**

Transport volumes in consignments Oct. 2008 – July 2009

**Consignments**



## Company Profile



- Founded in October 2007
- Based in Istanbul
- Shareholders: Kombiverkehr (50 %) and Adria Kombi (50%)
- Main business: intermodal transport services in the corridor between Turkey and EU states
- Target group: freight forwarders and carriers
- Outlook
  - Expansion of rail network connections in the Asian part of Turkey
  - Rail connections Middle East

## ■ Integrated European Project on the corridor Netherlands/Belgium – Turkey/Greece

Your network of competence and experience...

...for corridor-wide improvements of

**INTERMODAL**  
Logistics

Transport time

Reliability

Cost efficiency

Supporting Services

Customer-driven Rail freight services on a European mega-corridor based on Advanced business and operating Models

## CREAM-PROJEKT

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CREAM (**C**ustomer-driven **R**ail-freight services on a **E**uropean mega-corridor based on **A**dvanced business and operating **M**odels”)

- 30 project partners from 14 countries (railway undertakings, operators in combined transport, research institutions, technology providers)
  
- Project term: 1 January 2007 - 31 December 2009
  
- Main target is to improve rail freight services and gain competitiveness on the corridor between Western Europe and Turkey/Greece:
  - Shorten of transport time
  - Growth on rail freight transport volume
  - Creation of coherent Quality Management Systems to get equal conditions of transport and similar production quality on the whole corridor
  - Utilization of harmonized IT and Telematic systems
  - Knowledge transfer



THANK YOU VERY MUCH FOR YOUR ATTENTION!



Code XL

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