



Market Place Seminar Barcelona

2-3 November 2010

Session 1

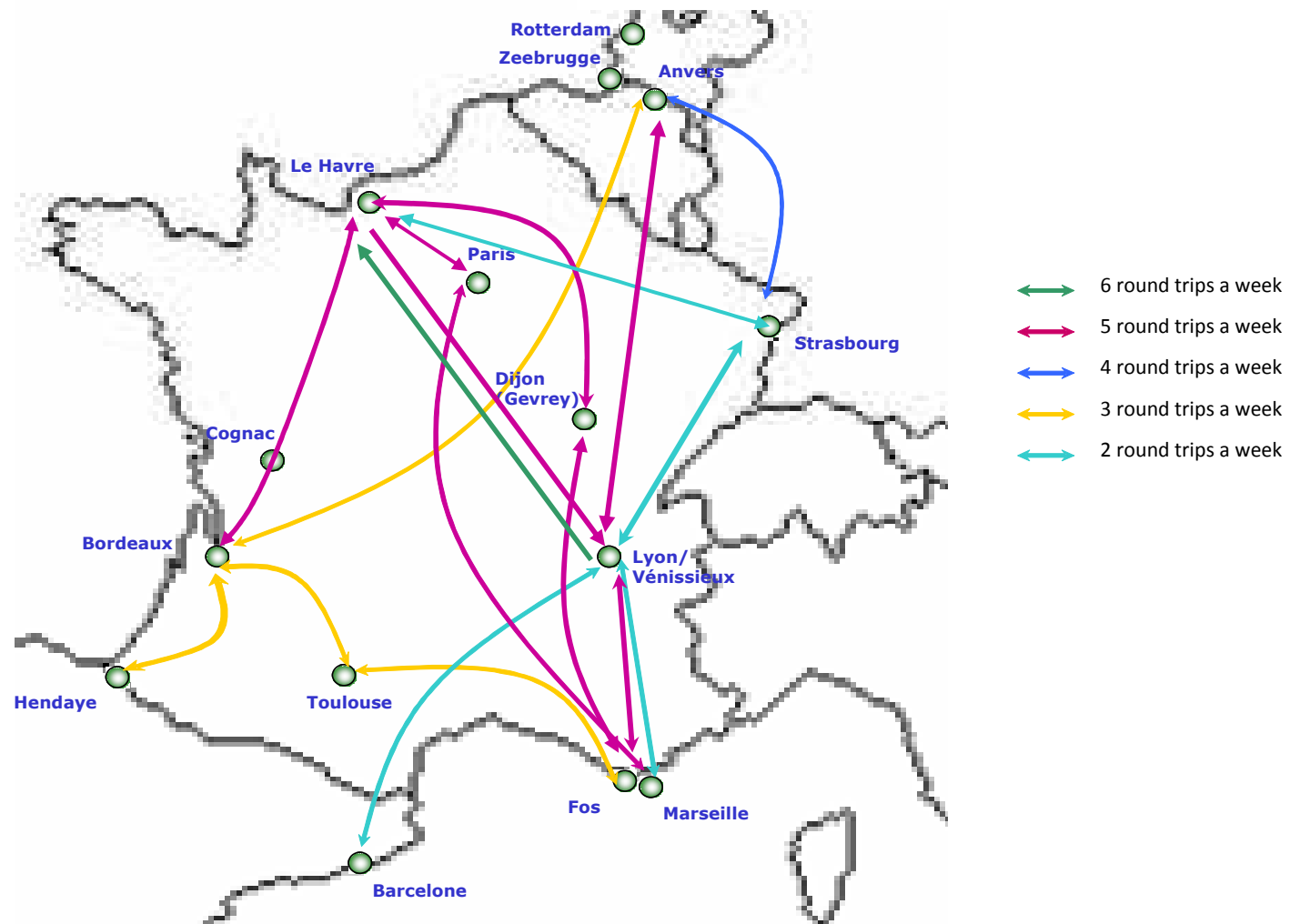
- Development of Interland transport around the Port of Barcelona
- What are the possible rail freight solutions and how can they be implemented ?

Our mission : QUALITY

Our aim : YOUR CONFIDENCE

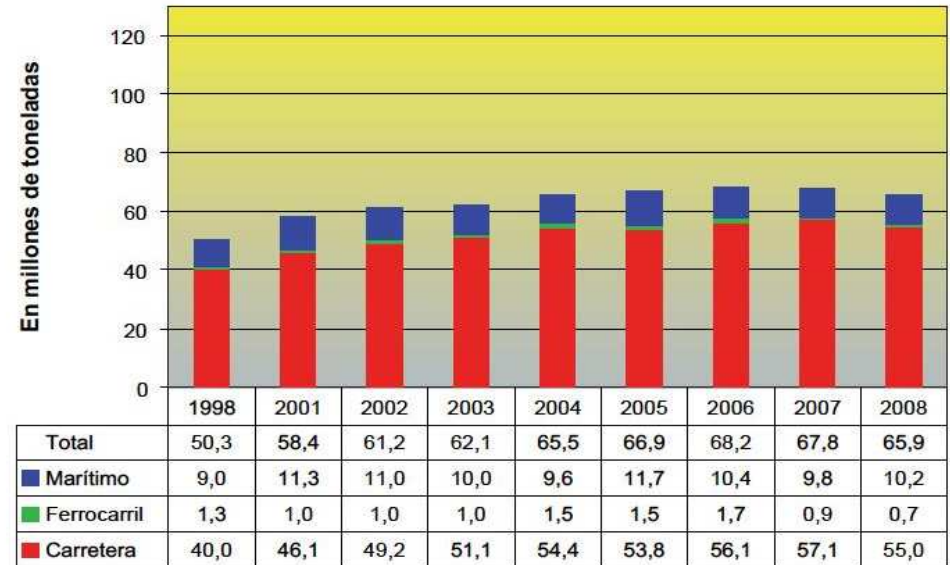
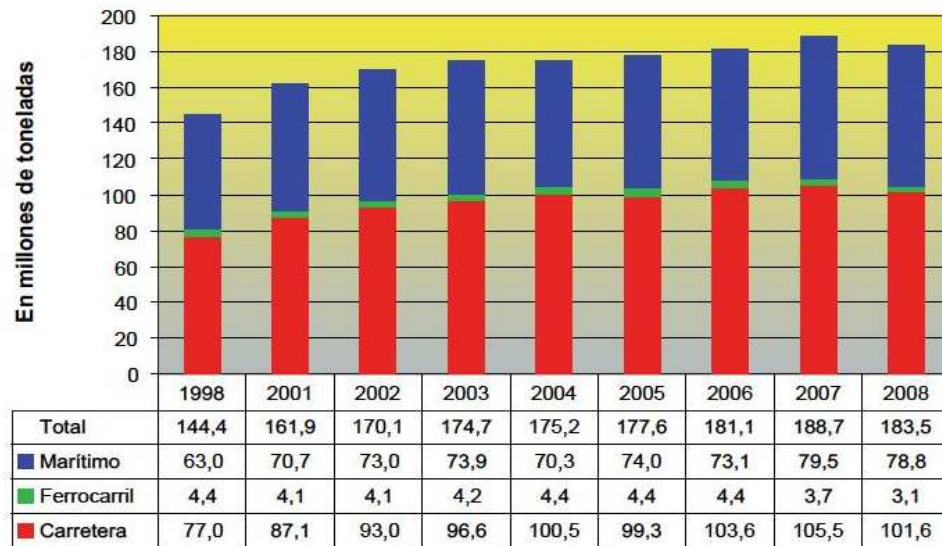
Our garanty : NEUTRALITY

- ▶ **Born 2005**
- ▶ **SNCF 100 % affiliated**
- ▶ **Leader in France on Maritime Combined Transport**
- ▶ **Operating under SNCF licence**
- ▶ **150 trains / week**
- ▶ **20 locomotives / 50 conductors / 1600 wagons fleet**
- ▶ **14 terminals (securing handling, storage, maintenance and reporting)**
- ▶ **Last miles operant in ports and inland terminals**
- ▶ **320 staff**
- ▶ **2009 figures : 280 000 TEUS operated ⇒ T.O. 90 M€**
- ▶ **Head office in Paris – Booking and trains operations centralized in Le Havre**
- ▶ **Performing data – Extranet Tracking / Tracing**

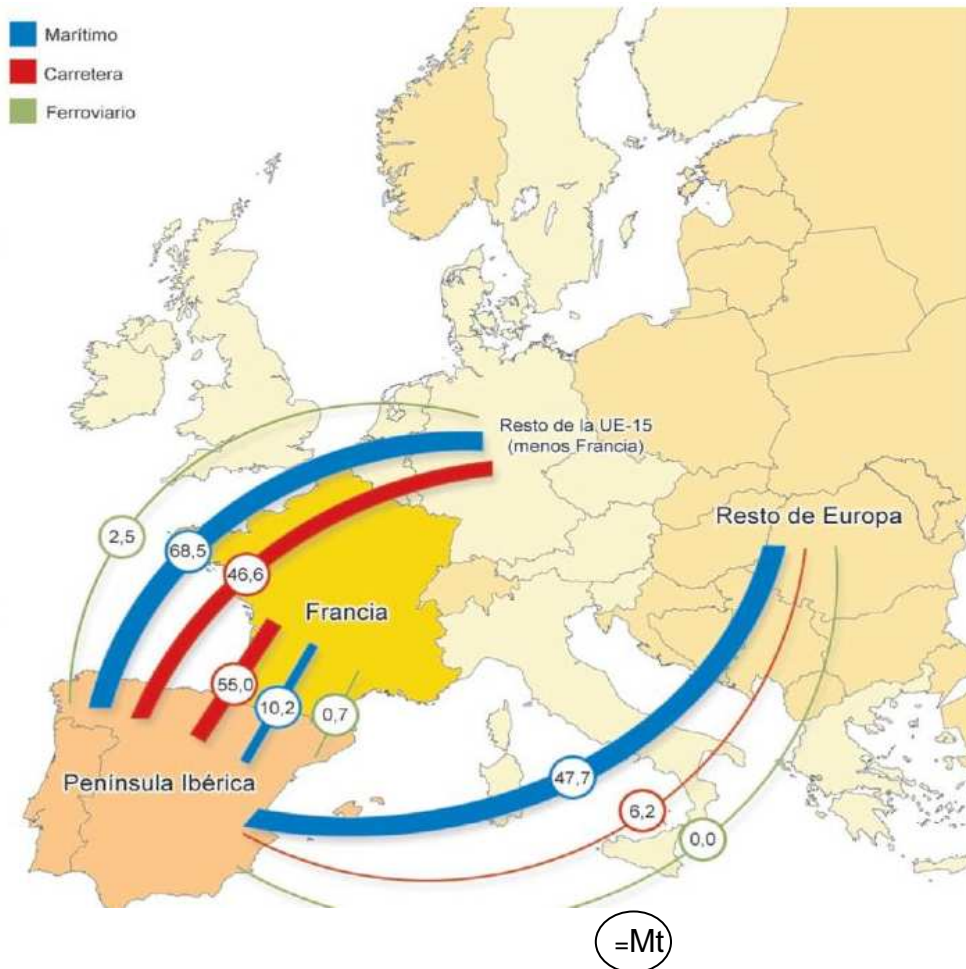




The rail freight Market in Spain: Today's situation



- ▶ The part of rail freight within the whole transport modes is the less than 10 years ago
In 2009 only 5,2 % of Interland transport from ports (8.8 Mt) has been transported through rail
- ▶ In the meantime Overseas & Overland transport had increase tremendously
- ▶ Why ? Competitiveness & Quality...



- France being at the cornerstone of freight exchanges between Iberian Peninsula and Europe
- The weight of rail freight is marginal Vs road and sea
- NAVILAND Cargo is already a key player on Combined Transport in France
- Already a recognized operator from Spain (Barcelyon)

Barcelyon service : rail container service from Port of Barcelona to Lyon







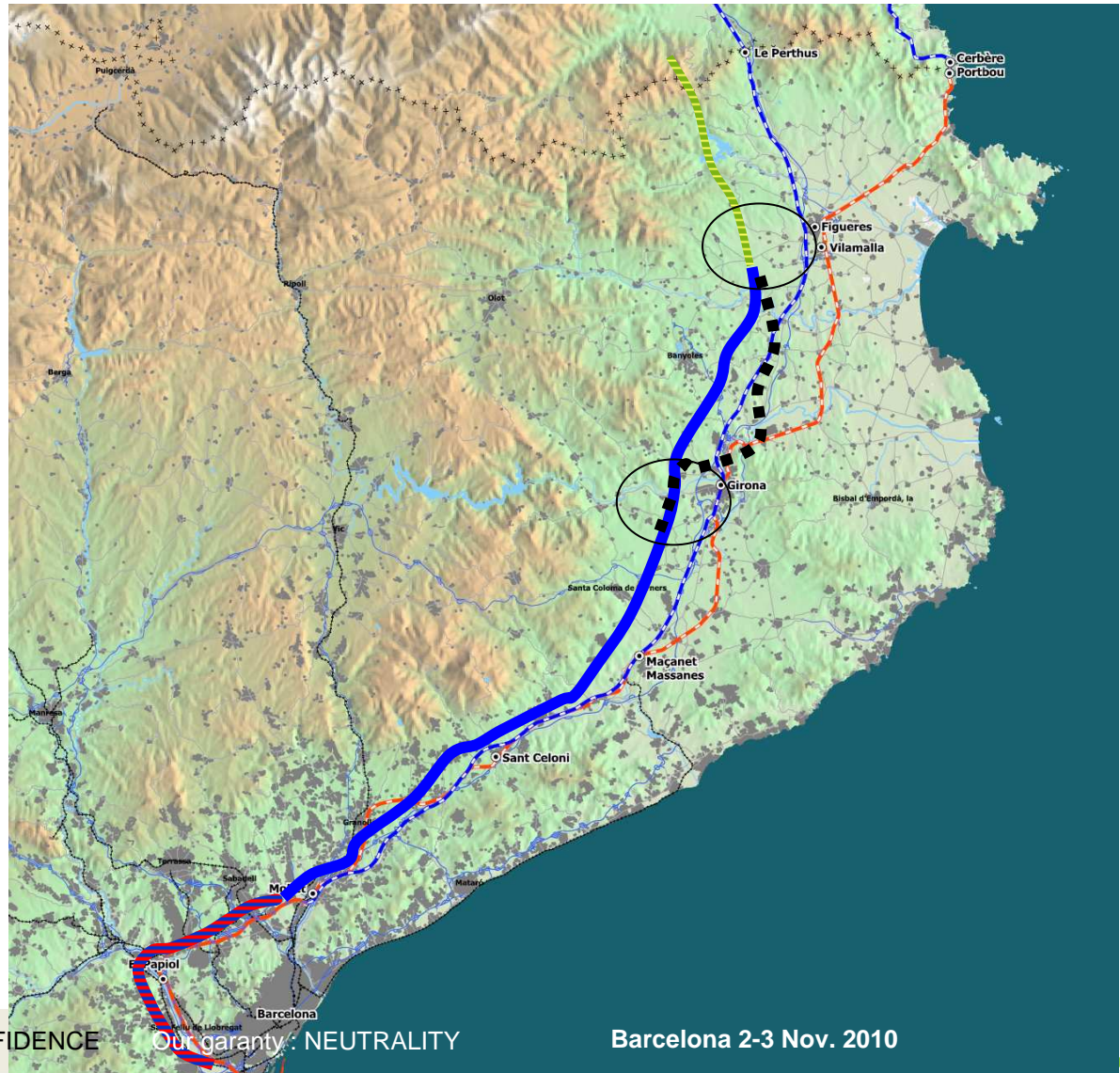
Naviland Cargo rail terminal in Lyon

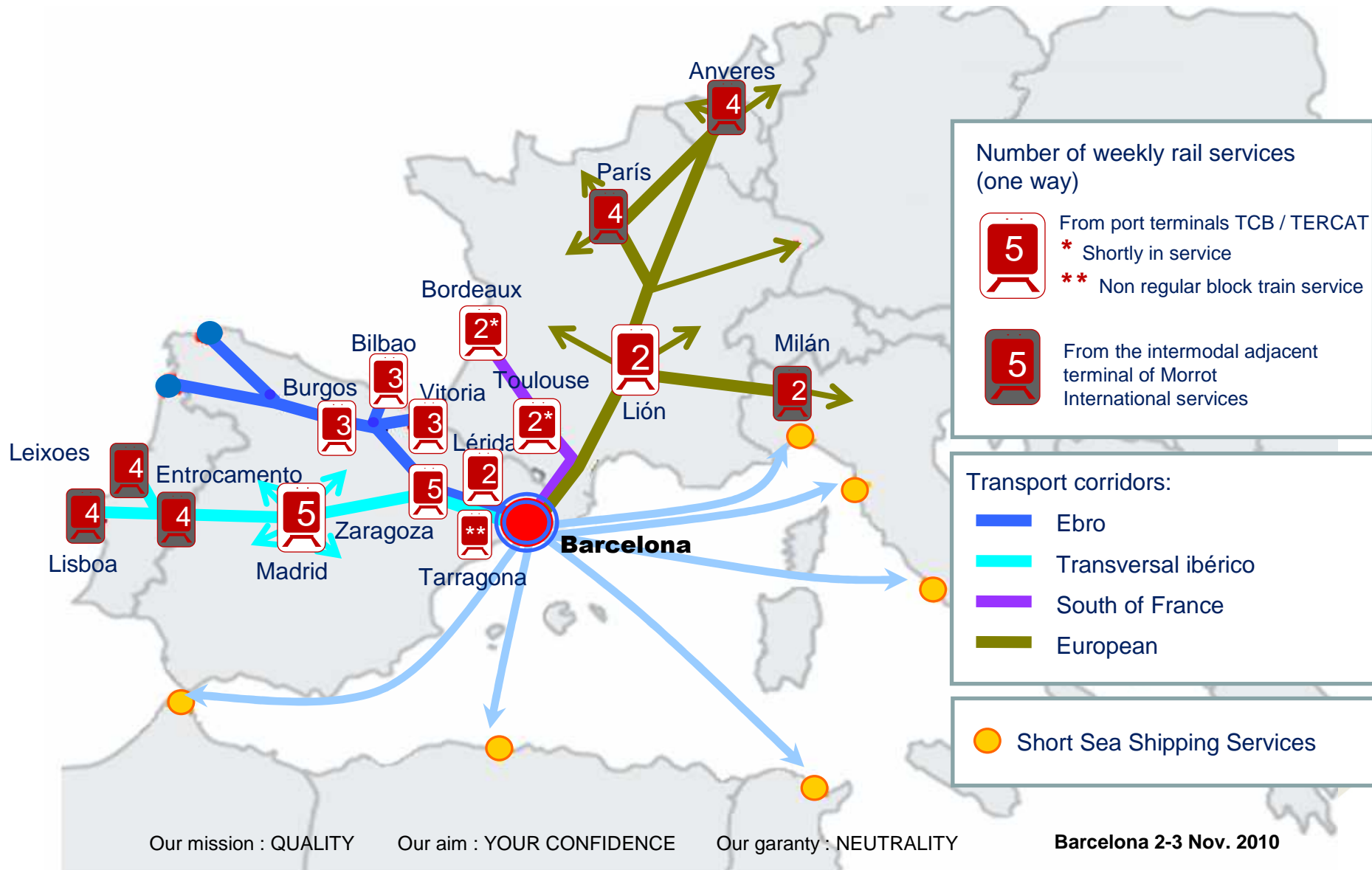


- ▶ Service operated Renfe & Naviland Cargo & Port of Barcelona
- ▶ Origin-Destiny: Spain (container terminals at the Port of Barcelona) – France (rail terminal at Vénissieux, Lyon)
- ▶ Frequency: 2 trains/week in both directions (Tuesday & Thursday)
- ▶ Multi customers train
- ▶ Maritime containers (40', 20', tanks, 45' and other types) and also continental containers
- ▶ Toulouse: in preparation (beginning 2011)

From January 2011 trains up to 750 meters will connect the Port of Barcelona and France using the new UIC line avoiding transshipment of cargo at the border.

-  **UIC gauge**
(high speed line)
-  **UIC+IB gauge**
-  **IB gauge**
-  **UIC + IB gauge**
(one track)





▶ **Selective Market Development**

- ▶ **On our core segments**
 - Port offer/sea containers
- ▶ **New territories**
 - Maghreb, Portugal, Italy
- ▶ **With new or developed capabilities**
 - Managing our own traction

▶ **Methods**

- ▶ **Preliminary : Using hubs as gateways**
 - Barcelona
- ▶ **Internal Development : Learning and competence development**
 - Support from SNCF Group
- ▶ **Strategic Alliances/Joint Development : Complementary competences, learning from partners**
- ▶ **Selectives external growth**

- ▶ **Developing our strategic Alliance with Port of Barcelona**
 - ▶ Launch of 3rd train between Barcelona and Lyon (possibly dedicated to a single customer)
 - ▶ Considering a new connection between Barcelona and Toulouse
- ▶ **Building a partnership with a road haulier in Spain**
 - ▶ For traction solution purpose (pre and post deliveries)
 - ▶ To promote and develop domestic traffics
- ▶ **Investment consideration in wagons**
- ▶ **Being an active partner of the terminal network in Spain (Port and Continental)**
- ▶ **Our offer will be pending to changes linked to UIC rail connection between Spain and France (Length of trains, direct connection to Barcelona...)**