



**French-Iberian Rail Link
Fostering European Connectivity
Barcelona, 2nd and 3rd November 2010**



- International operator of container and multipurpose terminals
- Rail logistic operators
- Engineering & IT services
- Spain, Brazil, Cuba, Mexico, Turkey, Colombia and India
- 13 maritime terminals
- 3 railway terminals
- Throughput 2009: aprox. 2,7 million TEUs
(Est. 3,1 mill in 2010)
- Turnover 2009: € 290 million
- All major shipping lines as client

Grup TCB in the world



Intermodal strategy

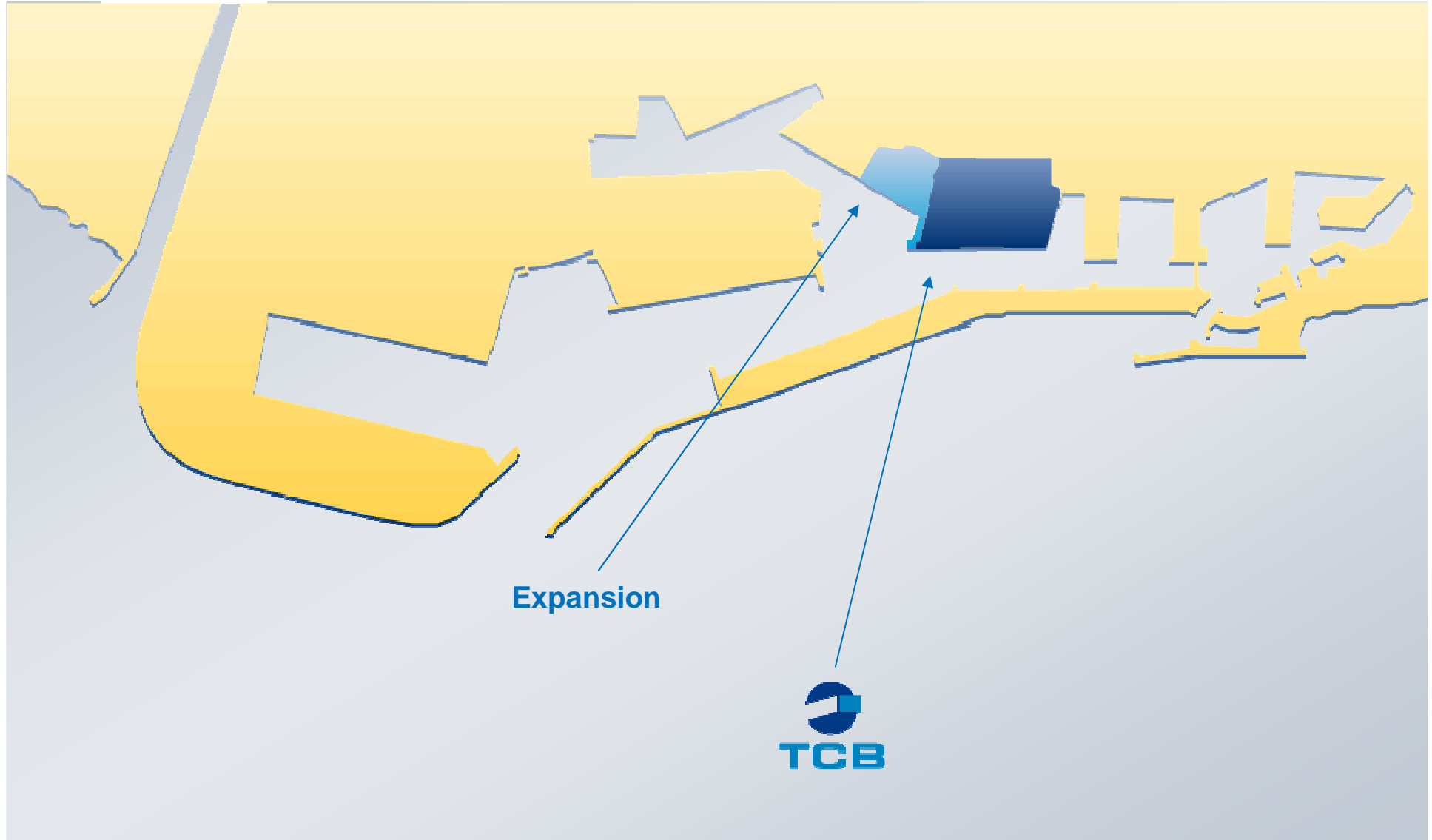
- Extension of service portfolio to our clients.
- Facilitate shipping lines, marketing & sales of their product to their final clients
- Promotion of rail services to inland points
- Expansion of our *hinterland* (including Europe)
- Competitive versus neighbouring ports
- European gauge (UIC) connection towards points inside Europe
- Active member of FERRMED from the beginning

Intermodal Services

- Barcelona: TCB Railway Transport
- Valencia: TCV Railway Transport
- TCB: Rail Terminal Muelle Sur
- TCV: Rail Terminal Muelle de Levante
- TCG: Rail Terminal Muelle de la Osa
- Zaragoza: tmZ Inland Rail Terminal
- Multimodal door to door services
- Dedicated Shuttle Trains
- Inland Rail Terminal Operation



Location



Expansion







Present situation





Future 2013 (Artist impression)



Barcelona railway terminal



- **TCB Muelle Sur:**
 - **Railway Area: Today**
 - 4 ha
 - 1 RMG
 - 4 tracks of 450 m each

 - **Railway Area: 31/12/2010**
 - 4 ha
 - 1 RMG
 - 5 tracks of 450 m each
 - ONE new track with mixed gauge, UIC and Iberian

 - **Railway Area: Expanded (2013)**
 - 5 ha
 - 3 RMG
 - 6 tracks of 750 m each
 - ALL tracks with mixed gauge, UIC and Iberian

Rail Terminal Operations



Rail Terminal Operations



TCB Railway



- **Intermodal Services:**
- **Rail:**
The main TCB Railway's activity is container transport by rail
- **Dedicated trains:**
TCB Railway operates a train from a single client
- **Multi-client trains:**
TCB Railway operates a train used by several clients
- **Multi-client RENFE network:**
TCB Railway uses RENFE's network for destinations not covered by own trains
- **Truck:** Container loading and unloading by truck, rail road

TCB Railway Services



RAILWAY SERVICE

Barcelona - Zaragoza:

- 10 trains per week

Zaragoza - Barcelona:

- 10 trains per week

Barcelona - Azuqueca:

- 5 trains per week

Azuqueca - Barcelona:

- 5 trains per week

Barcelona – LLeida:

- 2 trains per week

LLeida – Barcelona:

- 2 trains per week

Barcelona – Burgos:

- 3 trains per week

Burgos – Barcelona:

- 3 trains per week

Barcelona – Vitoria:

- 4 trains per week

Vitoria – Barcelona:

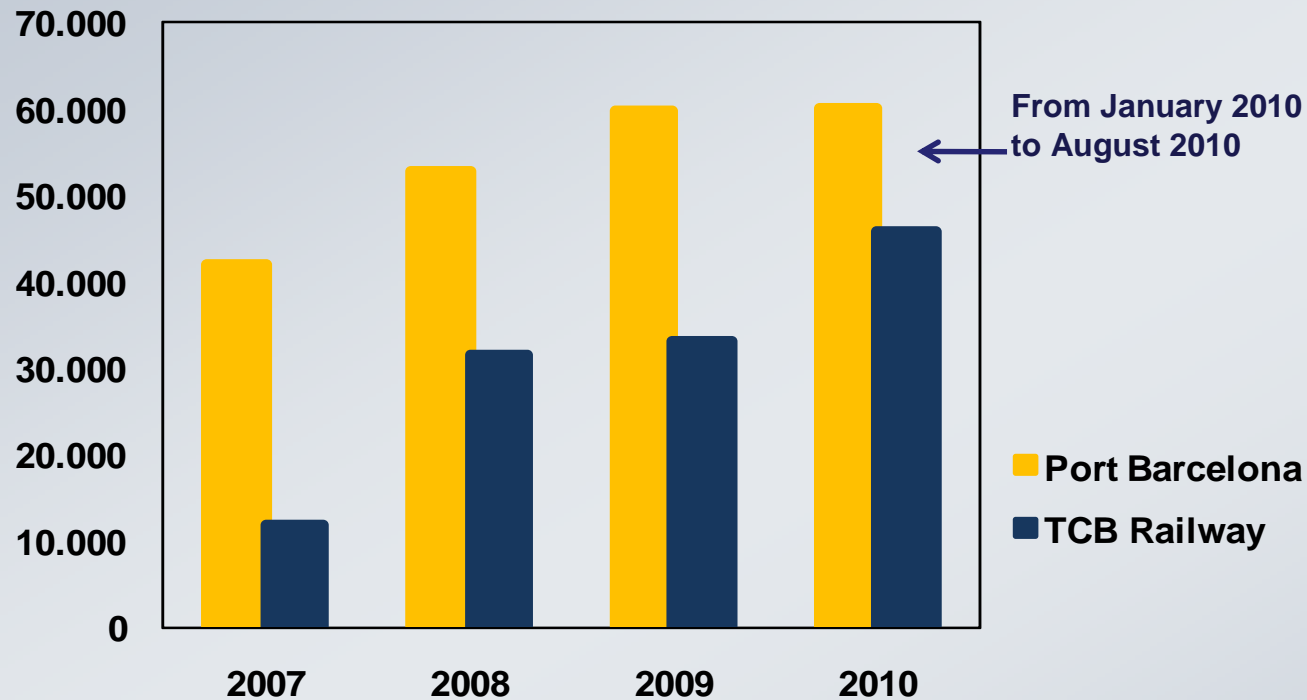
- 4 trains per week



Rail Coverage



Rail Traffic – Port of Barcelona



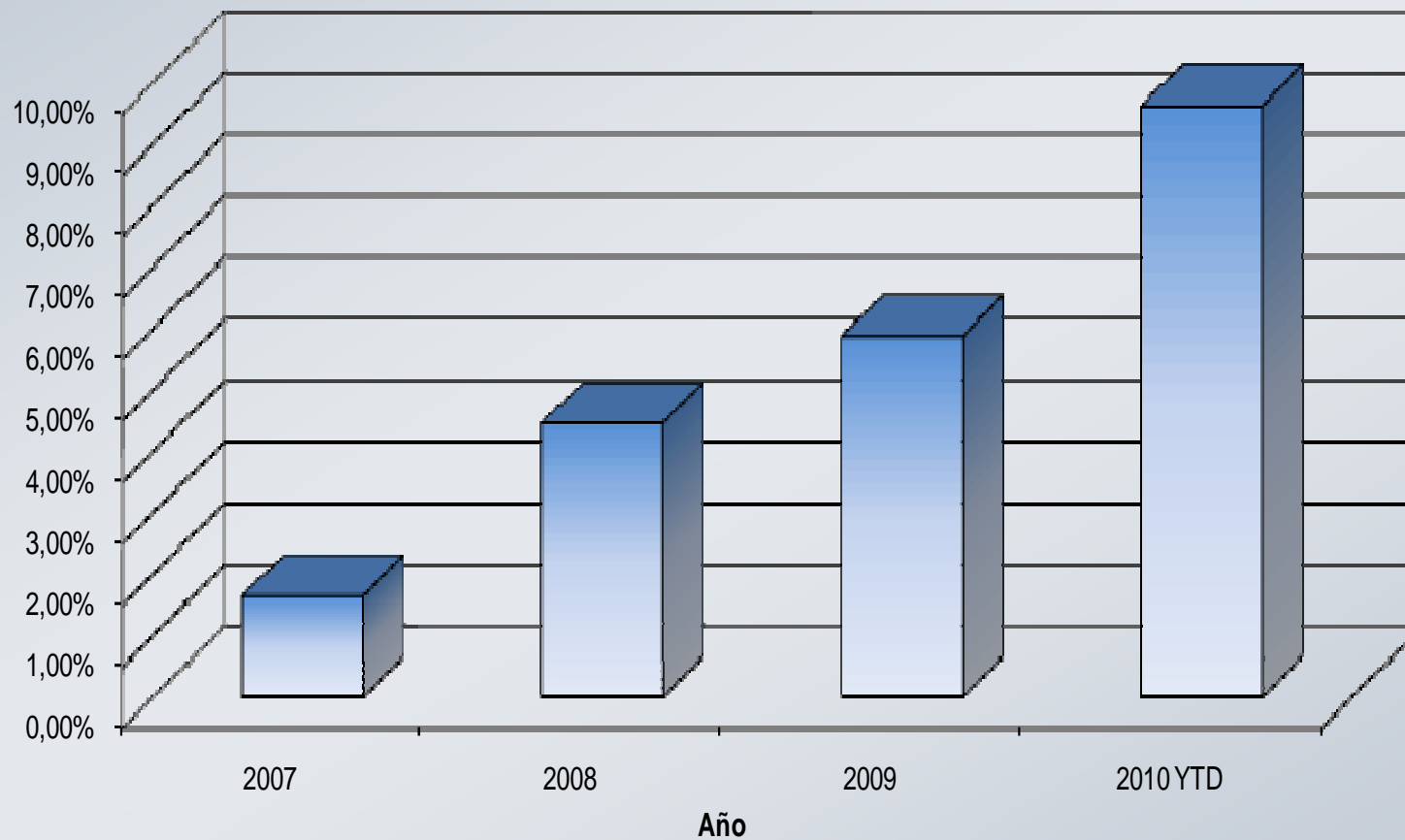
Rail traffic TEUS

Estimated volume 2010: 73.000 Teus

Rail Traffic – Port of Barcelona



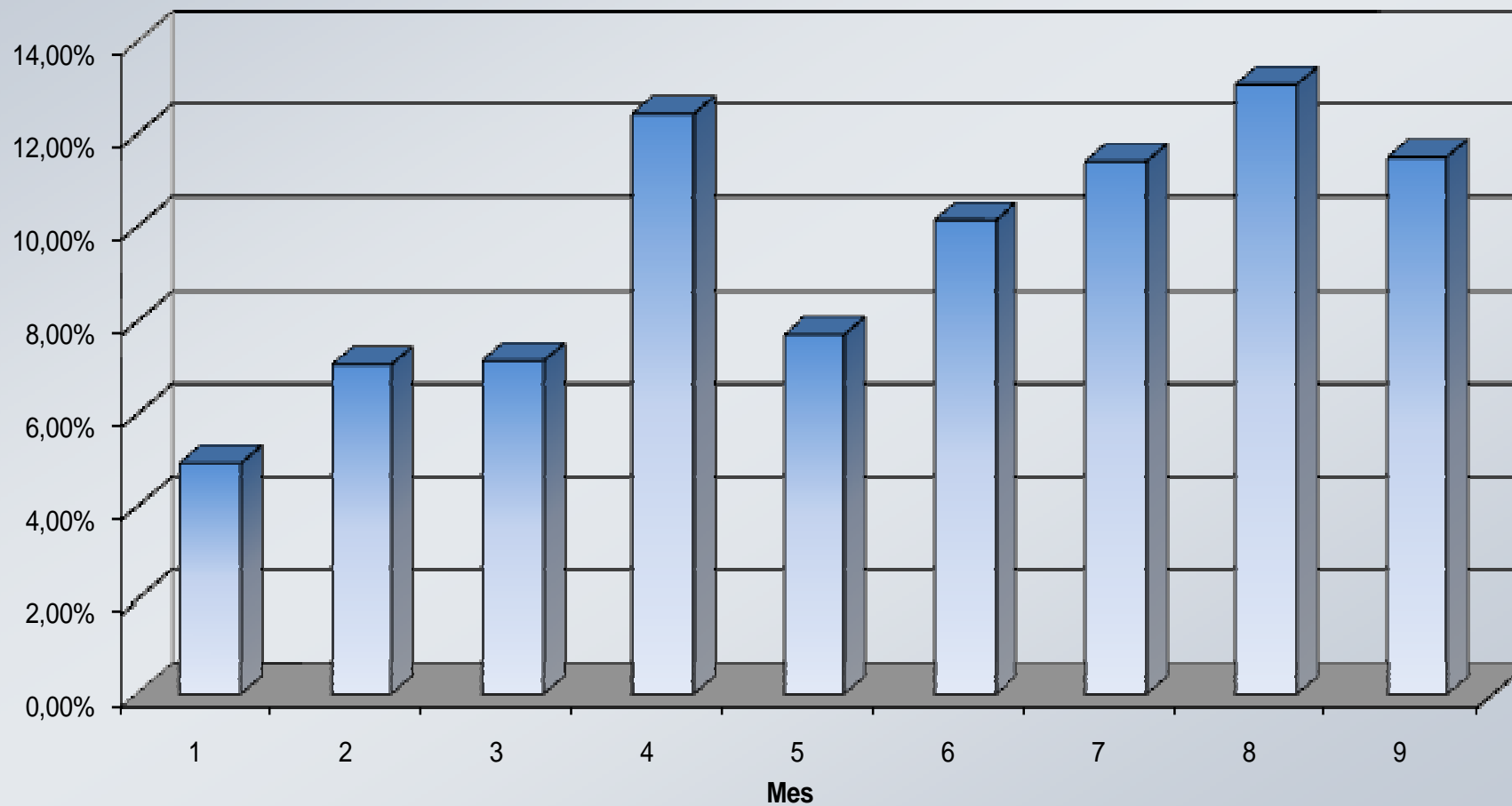
Cuota Anual ferroviaria TCB/TCB Railway



Rail Traffic – Port of Barcelona



Cuota Mensual ferroviaria TCB/TCB Railway 2010 YTD



Present Situation

- **BOTTLENECKS:**
 - **Container Terminals**
 - **Connection between Container Terminals and rail shunting yards**
 - **Length of Trains**
 - **Inland Terminals capacity**

Results in:

The railway volume in Container Terminals is increasing, but the infrastructure is insufficient. This means that growth possibilities are limited

Present Situation

- **INVESTMENTS:**
 - **Container & Inland Terminals with new tracks and equipment**
 - **Entry and exit from Container Terminals, better connections within the ports**
 - **Longer composition of trains (currently 450 m)**

Result:

In order to provide good service levels and increase market share, it would be necessary to invest in above points

Present Situation

- **ENVIRONMENTAL IMPLICATION:**
 - **Decrease number of trucks in road**
 - **Decrease number of trucks in Container Terminals**
 - **Safer transport**

Results in:

In Spain, each train carries 60 containers (roundtrip). That means an improvement for environment and road safety because using train transport suppose 60 least transports in trucks (for long distance)

Present Situation



- **NEW RAIL OPERATORS AND STATE RAIL OPERATORS:**
 - **Competition in railway sector in all areas**
 - **Opportunities for new markets**

Results in:

The arrival of private sector into railway transport has led to a “commercial war” between new private operators and the public operator (RENFE)

Present Situation



- **COMPETITION:**
 - **Price: Improve auxiliary costs of trains and services**
 - **Service:**
 - **Improve operational performance**
 - **Punctuality**
 - **More resources**
 - **Better Customer Service**

Results in:

Increase of the railway market share



GRUP TCB

Spain's leading international terminal operator!

www.gruptcb.com

Thank you!!

