Rotterdam and the Hinterland

Victor Schoenmakers
Director Europe
Container throughput Rotterdam results and forecast (2005 / 06)

2005 results 9.3 million TEU → 2006 9.6 million TEU
2010 forecast: > 12.0 million TEU (above the GC scenario)
Enormous growth of transport expected

Some forecasts:

- **Total throughput**
  - 2006: 377.4 million tons
  - 2030: 800 million tons (Hamburg Welt Wirtschaft Institute)

- **Container throughput**
  - 2006: 9.6 million TEU
  - 2015: 20 million TEU (figure DB)
  - 2025: 30 million TEU (projection PoR)
Enormous flow of containers expected

“Emma Maersk”
13,000 TEU

Hinterland transport
Hinterland transport

Modal split of all cargo into & out of the Port of Rotterdam

- 48% Barge
- 5% Rail
- 21% Pipeline
- 26% Road

This 5% needs to be improved the next years
Market forecast rail transport

Forecast rail transport Rijnmond
Verkenningen 2020 GC-scenario

<table>
<thead>
<tr>
<th>Year</th>
<th>mln ton</th>
<th>*1000 containers</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995</td>
<td>10,0</td>
<td></td>
</tr>
<tr>
<td>2002</td>
<td>20,0</td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td>30,0</td>
<td></td>
</tr>
<tr>
<td>2020</td>
<td>40,0</td>
<td></td>
</tr>
</tbody>
</table>

- niches
- liquid bulk
- dry bulk
- intermodal
- containers
Investing in infrastructure

- A more intense use of the existing port area &
- Port extension (land reclamation from the sea)

Maasvlakte 1: ECT (Delta & Euromax) & APM-T (Maersk)
Need for optimal RAIL connections

Relevant TEN corridors:

Primary focus on the market in Central and Eastern Europe:
• Paris – Strasbourg – Stuttgart – Vienna – Bratislava
• Rotterdam – Duisburg – Basel - Genoa

Secondary focus:
• Rail corridors Rotterdam – Poland & Rotterdam – Lyon & Barcelona
Betuwe line: a dedicated rail freight connection

- Port of Rotterdam to the German border: a.s.a.p. in operation
- German connection is essential (Emmerich – Duisburg): recent agreement Netherlands & Germany on 3rd track!
- Still some (actual & future) bottlenecks in Germany: solutions needed → 2010 - 2020
Rotterdam – North-Rhine Westphalia

Optimal use of the first step in the Rail corridor essential:

→ Betuwe line + track to Ruhr area
  - Extended gate concept: customs
  - Modal shift: from road to rail & inland barge
  - Reduces dwell times; more efficiency
→ Development of turning table NRW (Duisburg)

→ Next step: Main Neckar area
Port of Rotterdam and the connections to the Central Europe hinterland

- Bavaria, Austria, Czech Republic, Slovakia, Hungary & Southern Poland.

- **Need for new (additional) direct rail shuttles**

Why?
- Growing markets: improve Rotterdam market share
- Roads congested & relatively small network for inland barges
- Severe competition on rail with German ports
6 business cases on 6 core European freight corridors (based on the ERTMS corridors)

6 core corridors
A. Rotterdam – Genova
B. Stockholm – Bologna
C. Antwerp – Basel/Lyon/Lisbon/Algeciras/Porto de Sines
D. Lyon – Zahony
E. Hamburg/Mainz – Constanta
F. Zeebrugge – Terespol/Medyka

Why these corridors?
- Representing ~ 35% of total European rail freight volumes
  - ~ 25,000 track km
  - ~ 400 million freight train km p.a.
  - ~ 135 billion net tkm p.a.
- Covering most important freight flows in Europe over 18 countries
For the 6 corridors, a 61% volume growth is expected until 2020.

<table>
<thead>
<tr>
<th>Corridor</th>
<th>Name Countries</th>
<th>Corridor section length km</th>
<th>Volume 2006 Million freight train km</th>
<th>Absolute growth* until 2020 Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Netherlands-Germany-Switzerland-Italy</td>
<td>~ 2,000</td>
<td>56</td>
<td>86</td>
</tr>
<tr>
<td>B</td>
<td>Sweden-Denmark-Germany-Austria-Italy</td>
<td>~ 3,500</td>
<td>62</td>
<td>62</td>
</tr>
<tr>
<td>C/D</td>
<td>Belgium-Luxembourg-Germany-France-Spain-Portugal</td>
<td>~ 8,500</td>
<td>95</td>
<td>63</td>
</tr>
<tr>
<td>D</td>
<td>France-Italy-Slovenia-Hungary</td>
<td>~ 2,000</td>
<td>22</td>
<td>55</td>
</tr>
<tr>
<td>E</td>
<td>Germany-Poland-Austria-Czech Republic-Slovakia-Hungary-Romania</td>
<td>~ 6,000</td>
<td>88</td>
<td>56</td>
</tr>
<tr>
<td>F</td>
<td>Belgium-Germany-Poland</td>
<td>~ 3,000</td>
<td>77</td>
<td>46</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>~ 25,000</td>
<td>~ 400</td>
<td>Ø 61</td>
</tr>
</tbody>
</table>
The biggest investment needs result from bottleneck relieves (EUR 120.5 billion)

Total investment 2007 – 2020, EUR billions

<table>
<thead>
<tr>
<th>Corridor investments</th>
<th>Investment EUR billions</th>
</tr>
</thead>
<tbody>
<tr>
<td>A  • Gotthard tunnel (CH)</td>
<td>6.5</td>
</tr>
<tr>
<td>• High capacity line (IT)</td>
<td>5.0*</td>
</tr>
<tr>
<td>• Genova-Milan-Alessandria</td>
<td></td>
</tr>
<tr>
<td>B  • VDE 8.1 ABS/NBS</td>
<td>4.2*</td>
</tr>
<tr>
<td>• Nurnberg-Erfurt (bottleneck prevention) (GER)</td>
<td></td>
</tr>
<tr>
<td>• Brenner Tunnel (AUS/IT)</td>
<td>5.1</td>
</tr>
<tr>
<td>C  • Estimate capacity upgrade</td>
<td>9.4*</td>
</tr>
<tr>
<td>• Spain</td>
<td></td>
</tr>
<tr>
<td>• Estimate capacity upgrade</td>
<td>3.0*</td>
</tr>
<tr>
<td>• Portugal</td>
<td></td>
</tr>
<tr>
<td>D  • Tunnel France-Italy</td>
<td>7.6</td>
</tr>
<tr>
<td>• New high capacity line</td>
<td>3.6</td>
</tr>
<tr>
<td>• Slovenia</td>
<td></td>
</tr>
<tr>
<td>E  • Romania bottleneck relief investments</td>
<td>3.7*</td>
</tr>
<tr>
<td>F  • –</td>
<td>**</td>
</tr>
</tbody>
</table>

** Section under study by Spanish/French Ministries

Still studied

T Terminal investment
Policy Initiatives

18 October 2007: Publication of the European Commission’s Policy Statement on a Rail Freight Network, aiming at:

• Creating “corridor structures” of IMs and Member States to manage corridors
• Imposing “freight quality” indicators and measurements
• Identifying corridor “investment needs”
• Harmonising “priority rules” (at “service planning” and during “operations”)

ACTION

Influence European and National policies:

• Communicate the results of our 6 business cases to the ministries of the countries concerned by our 6 corridors
• Call for “corridor conferences” to be organised at minister level to raise awareness of infrastructure needs at the highest level
• Talk to your transport ministry
THANK YOU FOR YOUR ATTENTION