

Joint-stock company for railway transportation of goods "Serbia Cargo"

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Joint-stock company for railway transportation of goods, "Serbia Cargo" was created August 10th 2015. years in the process of restructuring "Serbian Railways" JSC

"Serbia Cargo" is divided into two big departments:

- ▶ Traffic and
- ▶ Development and joint operations.



Serbia Cargo provides the following services of transportation:

- ▶ Conventional transport,
- ▶ Intermodal Freight
- ▶ Transportation of special consignments,
- ▶ Transport of dangerous goods.



Conventional transport, including transport of wagon shipment in domestic and international traffic, such as bulk cargo, chemicals, products and semi-finished products metallurgical and construction industries, goods on pallets, and more.

Intermodal transportation includes transport of containers (length of 20 feet and more), trailers, semi-trailers, changable boxes, road vehicles (rolling road) and other intermodal units in full trains, complete container trains or individual shipments of containers.

Transportation of special consignments including transport of the shipment (transport vehicle with or without cargo) that on a given railway track exceeds the allowed load profile and/or the maximum allowed mass per axle and/or maximum allowable weight per meter and/or its construction, technical or other characteristics does not meet the prescribed requirements for railway operations and that requires special transportation technical conditions of transportation.

Transportation of dangerous goods including transport of goods that may danger for human health, cause the contamination of the environment or cause damage to property, that have hazardous properties for human health and the environment, which are defined as those laws, regulations or other regulations and international treaties, which, based on their nature or properties and condition, and in connection with transportation can be hazardous to the safety or that have proven toxic, caustic, irritant, inflammable, explosive or radioactive fallout.

For the reception and dispatch of consignments, Serbia Cargo have 75 opened official places (stations) and 114 stations, which have the special status and that can be opened for reception and dispatch of consignments, but only with special agreement with "Serbia Cargo."



In this moment Serbia Cargo has 84 locomotives that are in good condition and capable for transport, of which 52 are electric and 32 diesel. This year Serbia Cargo bought a new 8 multisystem SIEMENS electric locomotives with delivery February/March 2019. Negotiations are under way for the eight more of these locomotives.





Wagons capacity

Wagons capacity

REGULAR OPEN CAR WITH HIGH SITE

- ▶ Are intended for the transport of goods in bulk, all grain sizes and in pieces, and primarily those goods that do not need to be protected from atmospheric influences during transportation. Shipping is done from above or through the side door and front Toggle open the car. Serbia Cargo has 1188 cars of this series.



SPECIAL CLOSED CAR

- ▶ They are used mainly for transportation of goods on palette that must be protected from atmospheric influences (food goods, construction materials and etc.) Basic advantage of this series the car's ability to open side to page two-thirds of the length of the wagon. Serbia Cargo has 111 cars of this series.



Wagons capacity

ORDINARY CLOSED CAR

- ▶ The main purpose of closed wagons is the transportation part of goods, palletized things, live animals, food products and other things that need to be protected from atmospheric influences. Serbia Cargo has 20 cars of this series.



SPECIAL WAGONS WITH MOVABLE ROOF

- ▶ Are intended for the transport of goods that must be protected against atmospheric influences. The specificity of these wagons is reflected in the type of goods for which they are intended and the mode of unloading. Serbia Cargo has 274 cars of this series.



Wagons capacity

SPECIAL OPEN WAGONS WITH HIGH SITE

- ▶ They are used to transport large quantities of goods that do not require protection against atmospheric influences (such as ore, coal, coke, etc.) Serbia Cargo has 69 cars of this series.



REGULARY 4-AXLE PLATEAU AND SHALLOW WAGONS

- ▶ They are used to transport cargo in large chunks or large masses (agricultural and construction machinery, etc.) and other big cargoes which need not be protected against atmospheric influences. Serbia Cargo has 183 cars of this series.



Wagons capacity

SPECIAL PLATEAU CAR WITH FOUR OR MORE AXLES

- ▶ They are used to transport containers, heavy vehicles and construction machinery. The containers are placed on the floor, and their lateral movement prevent special 15 mm high sites that also serve to guide the container loading. This car can also be used as a regular car plateau where the sides down. Serbia Cargo has 160 cars of this series.



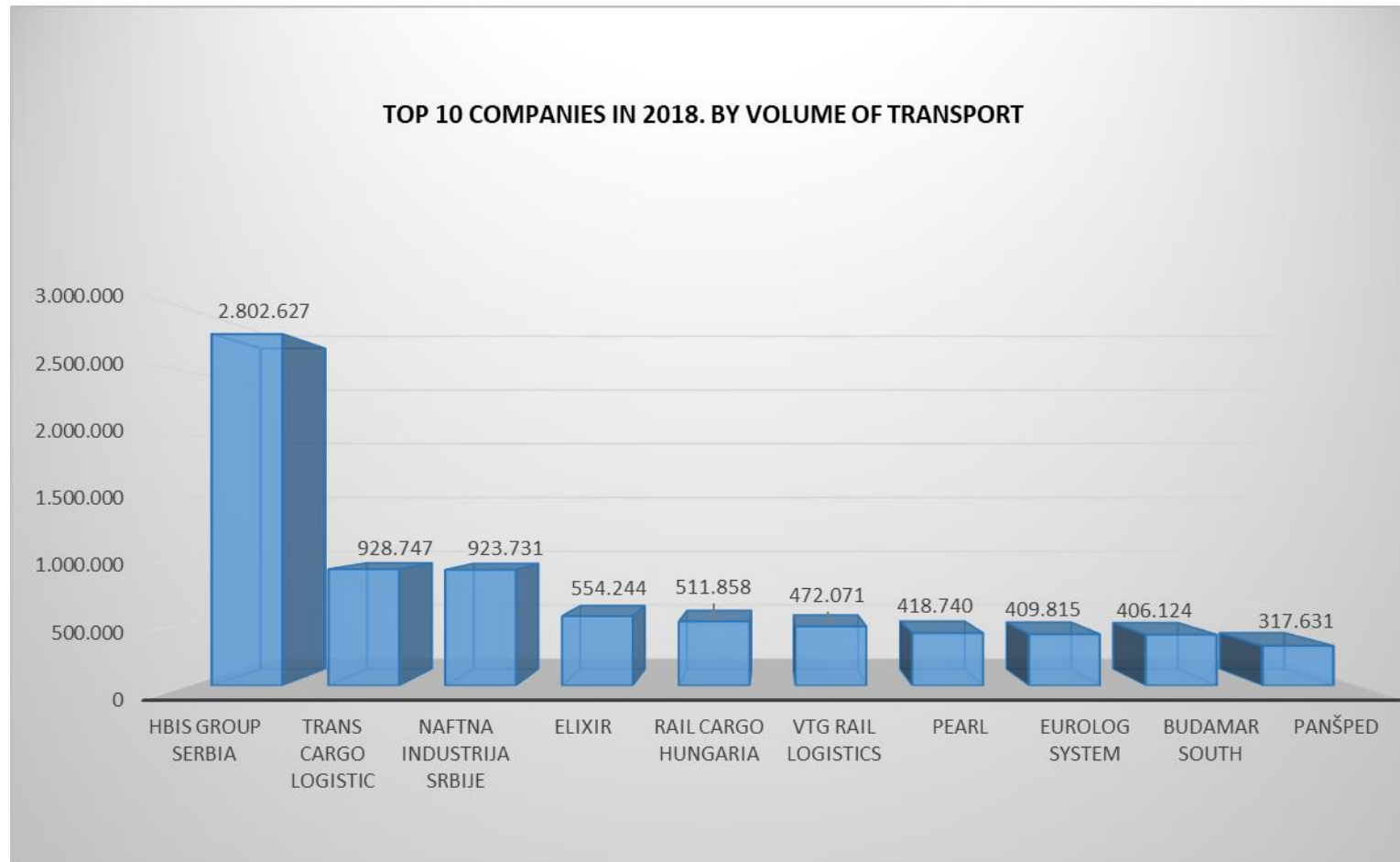
SPECIAL CLOSED WAGONS UNLOADING BY USING COMPACTED AIR

- ▶ These cars were primarily intended for the transport of cement, but they can also be used for transporting other cargo in powder or grain whose grit size does not exceed 5 mm. However, when the grain sizes larger than 2 mm can be transported only materials with special physical properties, primarily small specific weight (e.g., aluminum). Serbia Cargo has 8 cars of this series.



TRANSPORTS WITH SERBIA CARGO

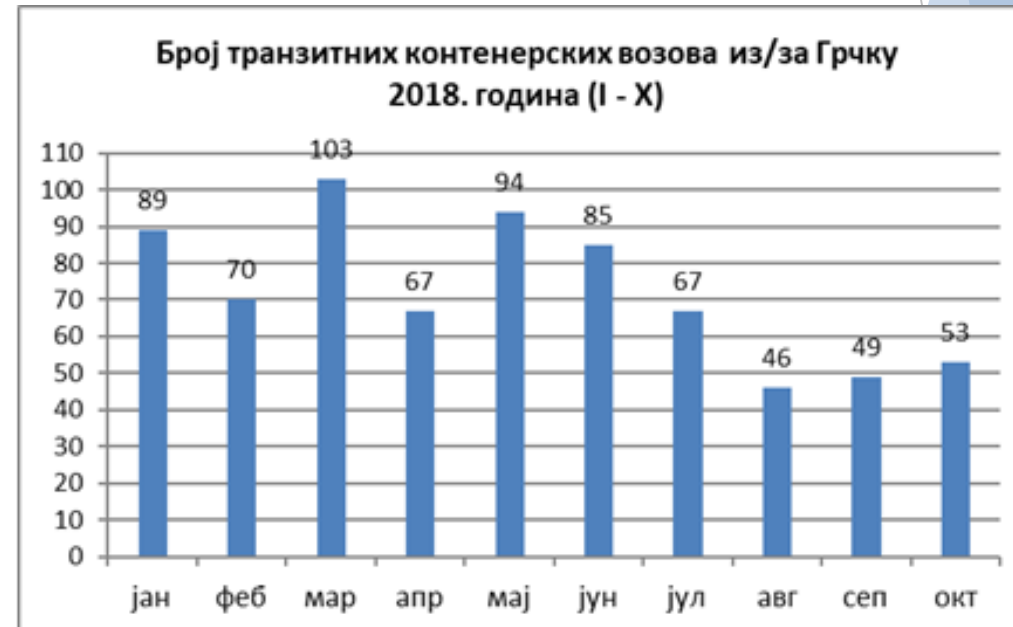
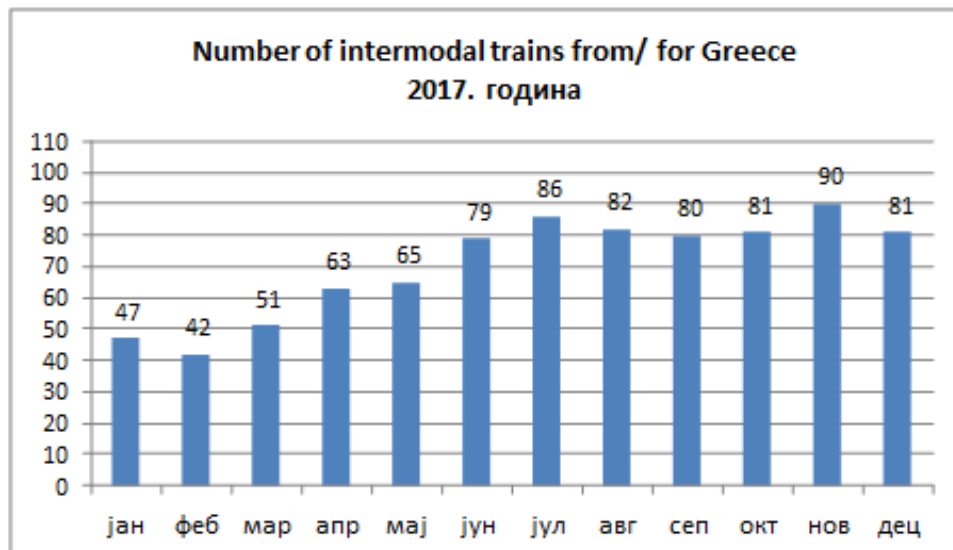
During the 2018. Serbia Cargo, as national operator, transported a around 11,229,663 tons of goods.



INTERMODAL TRANSPORTS IN SERBIA CARGO

Intermodal transport **in transit** refers almost exclusively to the flows of goods between Greece-EU countries and vice versa (here are included and goods flows occurring through Greek ports of Piraeus and Thessaloniki), as well as on flows of goods between Turkey - EU countries and vice versa.

With the included graphical view, it can be seen that an increase in the total transport trains from/to Greece which is recorded in the first half of 2018. year (in comparison with the same period in the year 2017), in July and August of current year comes a significant fall of volume of freight. This is a consequence of the loss of important clients who used the service of freight the train, and who have opted for the use of alternative transport routes, primarily maritime route across the airport on the Northern Adriatic coast. In this way, the goods are no longer transported via Serbia.



When it comes to transit transport from Turkey to the EU and vice versa, the fact is that there has been no recovery after the serious loss of flows in that direction, which took place at the end of March 2017. year. A graphical representation illustrate that these flows are maintained from that period at approximately the same level. However, it is important to note that there was registered the loss of another major clients and in 2018. year (trains Bosh-Siemens), which has its transporting redirected to competitive rail corridor through Romania and Bulgaria.



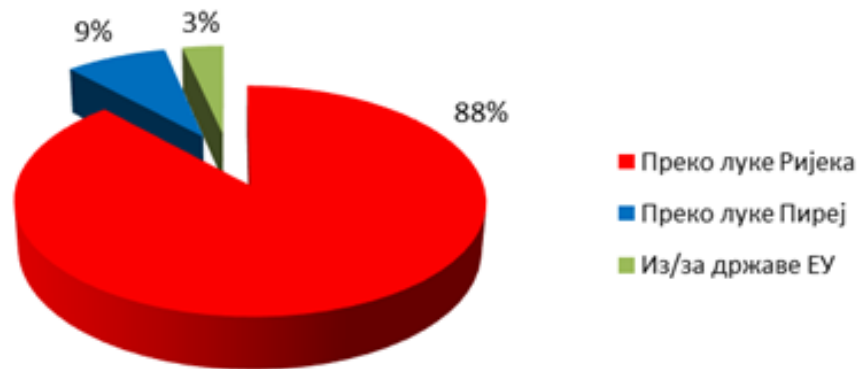
Analysis of the freight trains in transit through Serbia shows **possible risks for this transports:**

- ❖ very strong competition from other forms of transport (land and sea)
- ❖ very strong competition from other railway routes (rail corridor through Romania and Bulgaria),
- ❖ lower the cost of transportation by sea,
- ❖ significantly increase the reliability and security of transport road traffic,
- ❖ less administrative obstacles in transportation alternative rail way,
- ❖ very exposed the thefts because of the types of goods that are transported that are continuing and in 2018. year and constitute a decisive factor as to why customers are choosing to your goods not transported across Serbia.

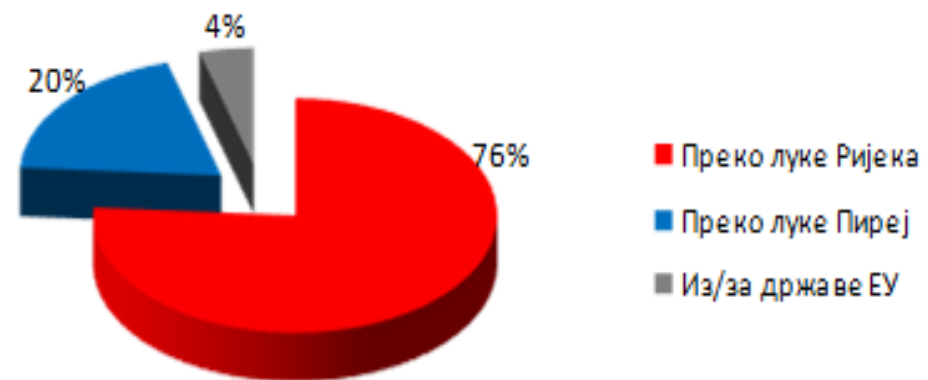
Intermodal transport in importing and exporting can be a differentiation in the following categories:

- ❖ Trains that are transported via the port of Rijeka
- ❖ Trains that are transported through the port of Piraeus
- ❖ Trains that are implemented transport from/to countries of the European Union

Структура превоза контернерских возова у увозу и извозу
2017. година

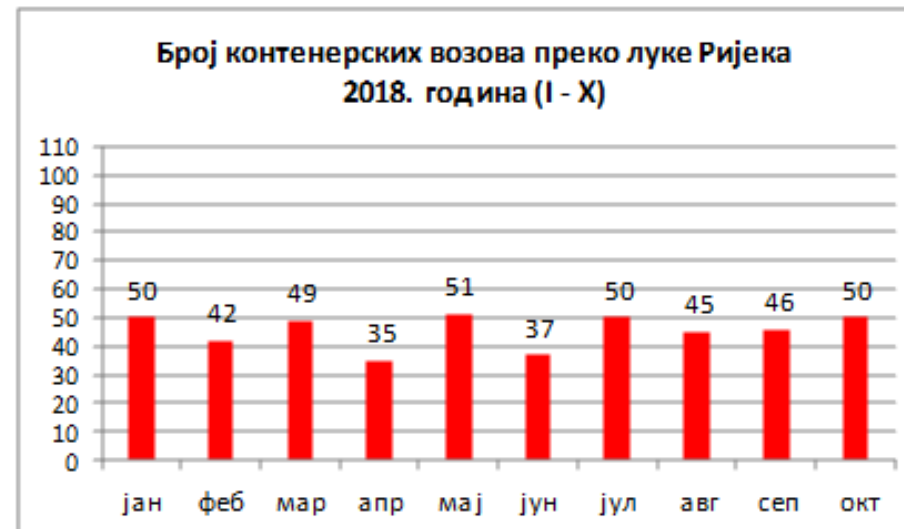


Структура превоза контернерских возова у увозу и извозу
2018. година (I - X)



In import-export intermodal transports in 2018. the year is dominated by transportation through seaports, which makes even the 96% of the total freight intermodal trains in imports and exports.

The volume of freight trains across the Rijeka port records growth in 2018. year, so for the first 10 months, transported number of trains than in the whole of 2017. year. On average, the number of trains on a monthly basis increased by 23.8%.



Transport of intermodal trains through the port of Piraeus, began in mid-2017. year. During the 2018. year recorded a growth in the number of this trains and in this direction, which is clearly seen in the graphics



Analysis of the freight trains in import/export via Serbia shows possible risks for this transports:

- ❖ great competition from road transport, which is on the routes priced extremely competitive,
- ❖ road transport offers typically significantly faster and more dependable transportation service,
- ❖ road transport is easily adjusts to the demands of clients in terms of sites on which to deliver or take over the container
- ❖ less susceptible to theft goods.

For these reasons, road transport remains highly dominant in terms of freight volume in relation to the railways, although the number of trains recorded a significant growth compared to the previous year.

Initiatives and plans for the development of competitive intermodal rail services in the region

- ▶ **Price policy** for this trains must be defined taking into consideration:
 - ❖ the importance of the client and cargo but also significance for the economy of the Republic of Serbia.
 - ❖ analyzed existing and potential flows of goods,
 - ❖ the possibility of winning new commodity flows that is currently taking place across Serbia,
 - ❖ analized competition (road, other rail corridor, sea...)
- ▶ **Capacity utilization:**
 - ❖ Serbia's cargo still takes precedence over the existing competition in the import/export transportation in terms of wagons capacity
 - ❖ Purchase of new multisystem locomotive should enable towing heavier trains, notably on basic transit directions
- ▶ **joint ventures in the construction of new railway terminals in Serbia**
- ▶ **strategic cooperation within companies (operators) on the route**
- ▶ **strategic performance in third markets that are the backbone of increasing volume of freight**

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***THANK YOU FOR YOUR
ATTENTION!***

