



INTERMODAL TRANSPORTATION

a way to meet 3 future challenges!



ITN webinar

Friday 8 November

9:00 – 10:30

Online



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Supply Chain
Program Committee

Housekeeping



Please stay on mute – if you have a question, raise your hand



Please turn your camera on



Feel free to ask questions



The presentations will be shared on the ITN webpage



This session will be recorded

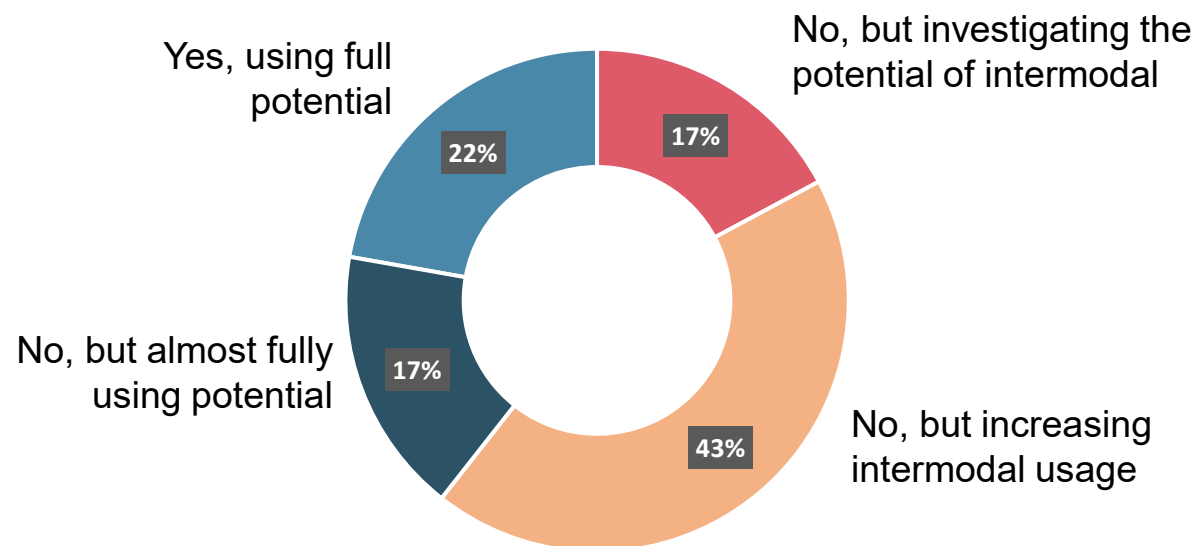
LEVERAGING THE POTENTIAL OF INTERMODAL TRANSPORTATION



Survey respondents

78%
of full potential in
intermodal transportation
is **not yet utilized**

INTERMODAL FULL POTENTIAL UTILIZATION

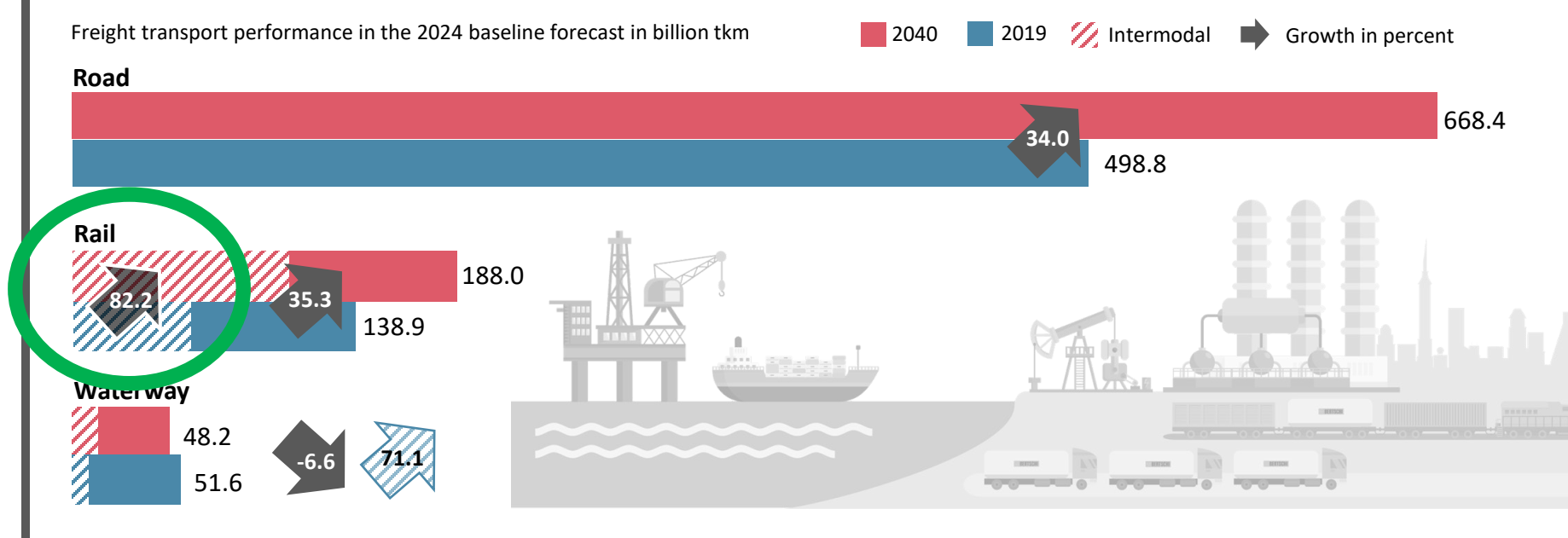


CONTINUED GROWTH AHEAD +1/3rd MORE TRAFFIC BY 2040



According to the new **traffic prognosis 2040** commissioned by the **Federal Ministry of Transport in Germany**, traffic is expected to increase annually by 1.3 percent until the end of the next decade.

INTERMODAL RAIL

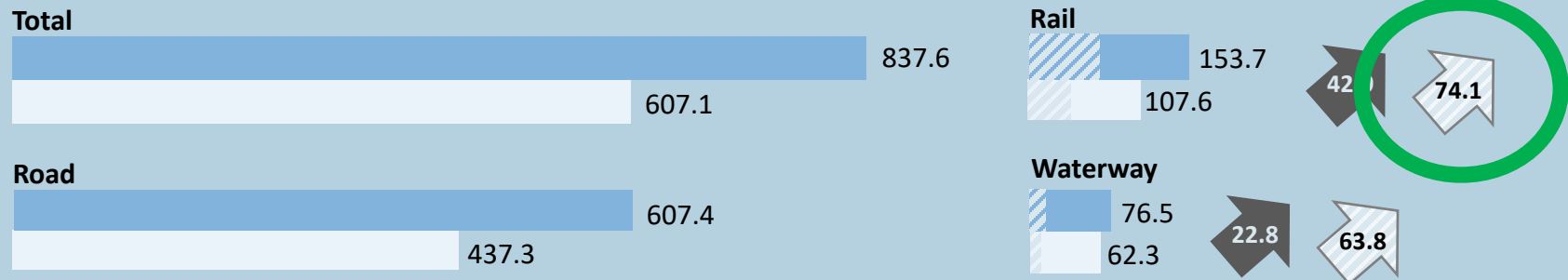


ACCELERATED GROWTH FOR INTERMODAL RAIL COMPARED TO 2014 PROGNOSIS

Freight transport performance according to 2014 forecast in billion tkm

Legend: 2030 (Blue), 2010 (White), Intermodal (Hatched)

Arrow: Growth in percent





- 9:00 – 9:05** **Welcome and introduction?** *Jan Arnet, Bertschi*
- 9:05-9:20** **Recap on April workshop and summary of achievements since then**
Jan-Jacob Blussé van Oud-Alblas, Deloitte
- 9:20-9:50** **Industry insights from leading rail intermodal operators**
Heiko Krebs, Kombiverkehr and Michail Stahlhut, Hupac
What to expect in 2025 and 2026?
 - Market forecasts (within confines competition law), opportunities, and challenge
 - Impact of track work and available subsidies on intermodal transport
- 9:50-10:05** **Deep dive into an example of successful intermodal cooperation**
Samuel Alonso, LKW Walter and Gian Bühlmann, Bertschi
- 10:05-10:20** **Moving forwards: planning the 2025 workshop??** *Jan-Jacob Blussé van Oud-Alblas, Deloitte*
- 10:20-10:30** **Closing remarks,** *Jan Arnet, Bertschi*

EPCA – ITN REFLECTION

Intermodal Transportation
Workshop Follow-up

by **Deloitte.** &  **EPCA**

| DELOITTE IN COLLABORATION WITH EPCA | INTERMODAL TRANSPORT

Conference follow-up

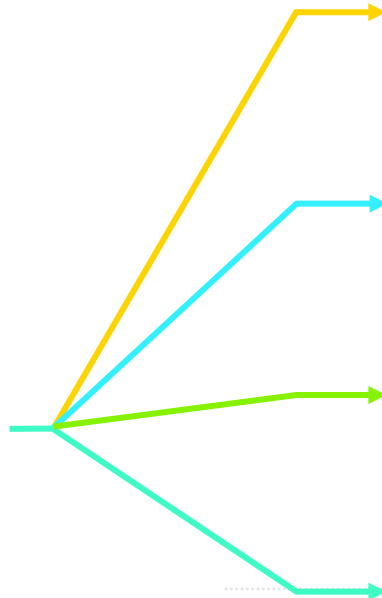
We have conducted several interviews with participants after the conference to assess the impact of the event and prepare a useful follow-up

ITN conference

- We **conducted our first ITN conference** in Brussels in April 2024, where we gathered 40+ participants to **collaboratively identify challenges and workshop potential solutions**
- **A report-out was shared** after the workshop containing the potential solutions and a workplan template for individual implementation by shippers, LSPs, and Operators to implement them

1:1 follow-up w/ shippers

- What **relevant recent developments** have occurred since the workshop?
- What was the **impact of the workshop on you and your company** in terms of thinking, planning, and decision-making?
- How **were you able to use the tools provided** after the conference?
- What are you looking for in a next workshop** to continue examining and implementing opportunities for improvement in intermodal transportation?



Relevant recent developments

Several common themes emerged from the follow-up interviews that we conducted: despite the challenges of the intervening period, the long-term commitment to use and increase the use of intermodal transportation, and some bright spots remain



Cost pressure

Both from the point of view of the shippers and their customers, **the imperative remains on controlling cost in transportation – sustainability is rarely mentioned**



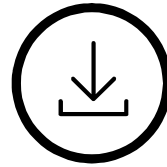
Service levels

Rail reliability remains a key concern. The combination of planned events such as construction and unplanned events (landslides, derailments) led to **frequent and long disruptions of service** this summer



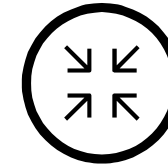
Volatility

The **chemicals market remains in upheaval**, cycling through periods of upswing and downswing more quickly, with higher peaks and deeper troughs, and with streams disappearing or rerouting completely



Commitment

Despite the combination of cost pressure and poor service levels – and the internal pressure from sales departments who push on price and service levels – **commitment to increase use of intermodal transport to meet long-term targets**













Bright spots

Intermodal rail transportation **can still flourish in some areas** to grow its share of total volumes transported: particularly for servicing customers across long distances or for creating mobile, local buffers in distant markets

Conference insights

The interviews showed that the conference and its report-out acted as a benchmark, source of inspiration, and provided useful leverage in other projects

CONFERENCE OUTCOME	IMPLICATION
 Provided a performance benchmark	 Sharing experiences led to “a-ha” moments: all companies that aim to replace road with intermodal transportation experience the same challenges
 Helped set realistic expectations	 The solutioning workshop revealed that there are no silver bullets – this helps set realistic timelines for internal stakeholders (e.g., commercial and sales departments) that are pushing on service levels and price
 Provided inspiration for new logistics approaches and models	 Intermodal is not only an alternative to road transportation and should not be seen that way: it also can enable new logistics models where stock is distributed, forward-based, and mobile close to key markets.
 Served as a market exploration	 Some shippers appreciated the opportunity to interact with multiple LSPs to quickly familiarize themselves with their propositions – and in doing so create new connections and trust
 Leverage other initiatives to promote Intermodal – and use the report-out as source for inputs	 The participants we interviewed did not implement the report-out’s work plans due to limited capacity – but they were able to use them as a source of inspiration for inputs to other company projects and initiatives to promote the use of intermodal transportation

INTERMODAL TRANSPORT

CHALLENGES & CHANCES AHEAD.

Mehr als ein Transport.

WHAT DO WE STAND FOR?

- We act neutrally: Equal usage and access for all customers
- From forwarders for forwarders: 50 % of Kombiverkehr is owned by more than 200 transport companies
- Our benchmark for transport rates is the long-distance road freight transport
- We offer transport options ranging from single loading units to block trains



PERFECTLY CONNECTED.

WITH KOMBIVERKEHR TO THE CHEMICAL HUBS
AND ECONOMIC CENTRES OF EUROPE.



2

Networks: DE & EU



25

Countries



110

Terminals EU-wide



170

Departures per Day



15.000

Connections
in Gateway Transport

Challenges and Chances ahead: The Transformation of our Network

Background

2022:

EU investigations against the Federal Republic of Germany concerning potential anticompetitive subsidies for DB Cargo (by DB AG)

2023:

Kombiverkehr is mandated by its board of directors to **develop a strategy to secure traction** if DB Cargo was no longer available for larger transport volumes

Outcome

- Kombiverkehr will transfer the majority of its connections to **new traction providers**, the largest part to **KombiRail** and **Lokomotion**
- Start-up phase has begun in the second half of 2024
- The Reorganisation of our traction providers is scheduled to be completed in January 2025

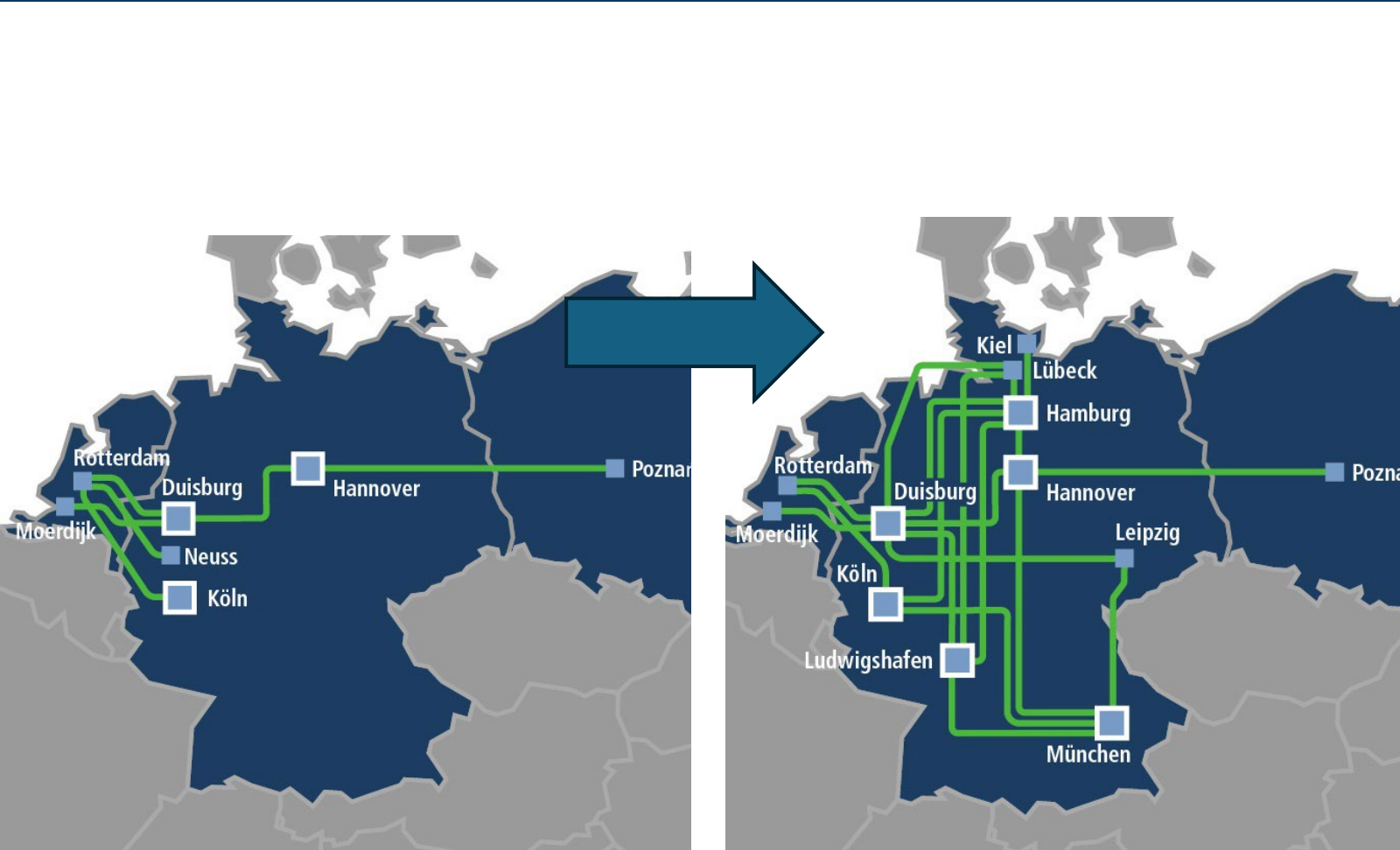
The Transformation means Challenge and Opportunity at the same time:

- Kombiverkehr increases its investment in traction and wagon management
- Collaboration and communication channels as well as digital interfaces must be rebuilt or expanded with new traction providers
- This new much more integrated approach of traction and operation comes with a promising outlook:
 - ✓ Reduced overhead costs
 - ✓ Optimized collaboration and communication between Kombiverkehr and its traction providers
 - ✓ Increased network reliability and resilience

On our way to a future-proof, reliable and efficient network

Quick Insight:

How KombiRail's (KRE) traction service for Kombiverkehr will increase.



KRE so far:

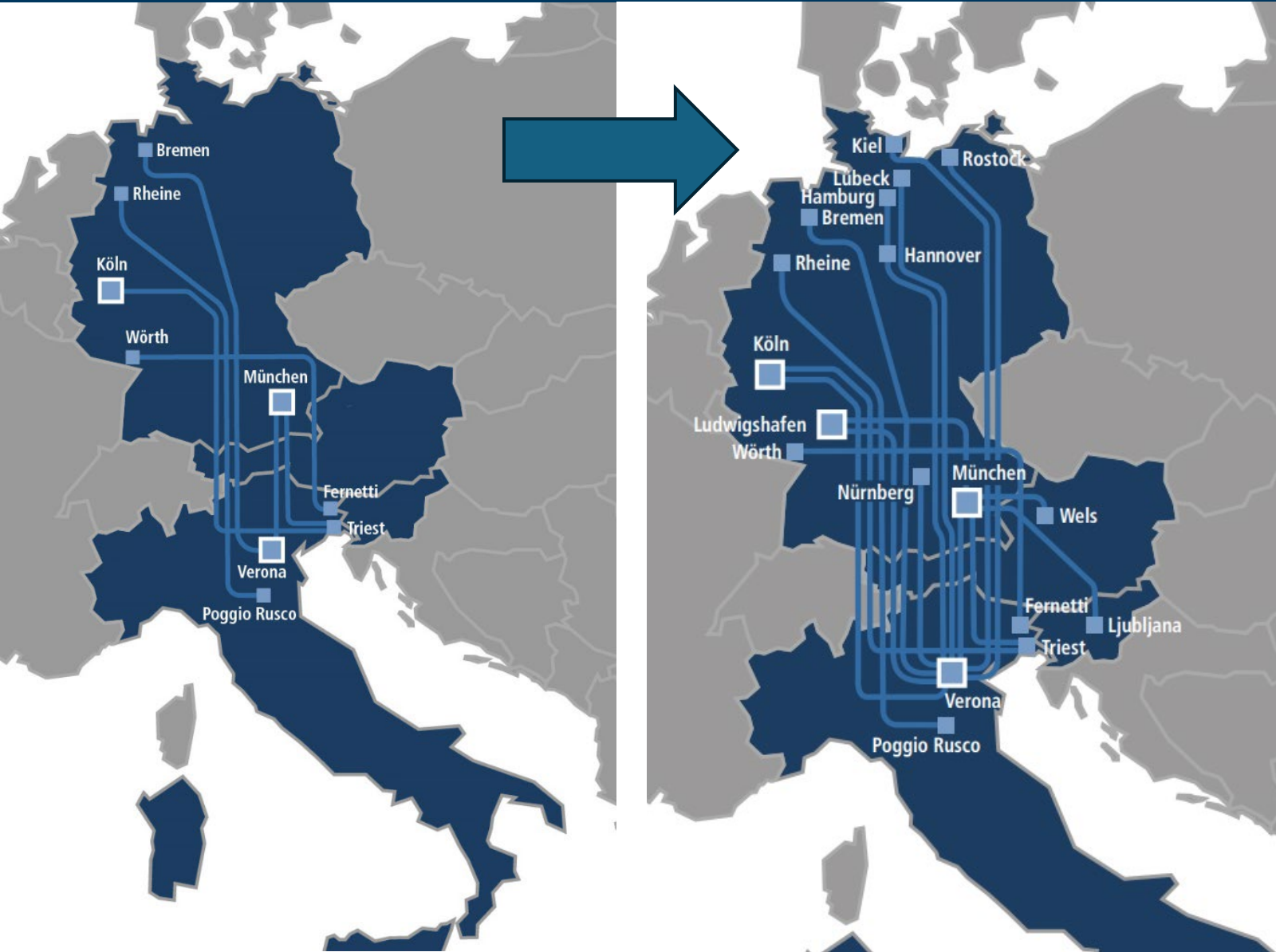
- All connections from/to Rotterdam to Duisburg, Köln and Neuss
- Moerdijk – Duisburg
- Duisburg – Hannover – Poznan

KRE additionally as of 2025:

- Hamburg – Ludwigshafen
- Hamburg – Köln
- Hamburg – Duisburg
- Hamburg – Kiel
- Hamburg – Lübeck
- Hamburg / Hannover Lehrte – München
- Duisburg – Leipzig
- Duisburg / Ludwigshafen – München
- Köln – München
- Leipzig – München
- Lübeck – Ludwigshafen
- Lübeck – Duisburg

Quick Insight:

How Lokomotion's traction service for Kombiverkehr will increase.



Lokomotion so far:

- Bremen – Verona
- München – Verona
- München – Triest
- Köln – Triest
- Würth – Ferneti
- Rheine – Poggio Rusco

Lokomotion additionally as of 2025:

- Köln – Verona
- Lübeck – Verona
- Kiel – Verona
- Rostock – Verona
- Ludwigshafen – Verona
- Hamburg / Hannover Lehrte – Verona
- Nürnberg – Verona
- Ludwigshafen / München – Wels
- München – Ljubljana

INFRASTRUCTURE CONDITION CAUSES...



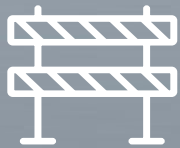
...transportation time
extensions and
cancelations



...higher demand of
resources: Staff and
locomotive hours at
record level



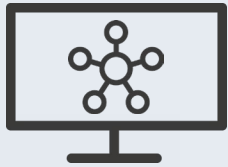
...strong increase in
track access charges



Enormous need of infrastructure renovations necessary
within the next ten years. Intermodal transport must
cope with major construction sites and track closures.



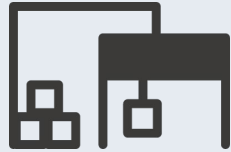
HOW WE MEET THESE CHALLENGES



Standardization & Digitalization:

Sector Initiative *KV 4.0* as a perfect example for both aspects.

Fully digital Customer Journey for easy booking and order management, transparent tracking, fast delivering/picking up at the terminals and electronic invoicing.



Terminal Strategy

Widespread shareholding strategy throughout Terminals in Europe.

Ensures intermodal capacities for our customers in the event of a terminal cut-off due to infrastructure renovations.



Fleet Strategy

Diverse Fleet of Locomotives to be able to use any rail track.

Keeps our trains running even if our standard routes are under construction.



NETZE



- ✓ Robust setups even during track closures
- ✓ Flexible and adaptable routings during constructions works
- ✓ Lean and digital processes for efficiency and cost reduction
- ✓ Sustainable and reliable capacities

Kombiverkehr

READY TO KEEP YOU RUNNING.

The power of intermodality.



Intermodal solutions: resilience oriented production system

Michail Stahlhut
CEO Hupac Group

8.11.2024

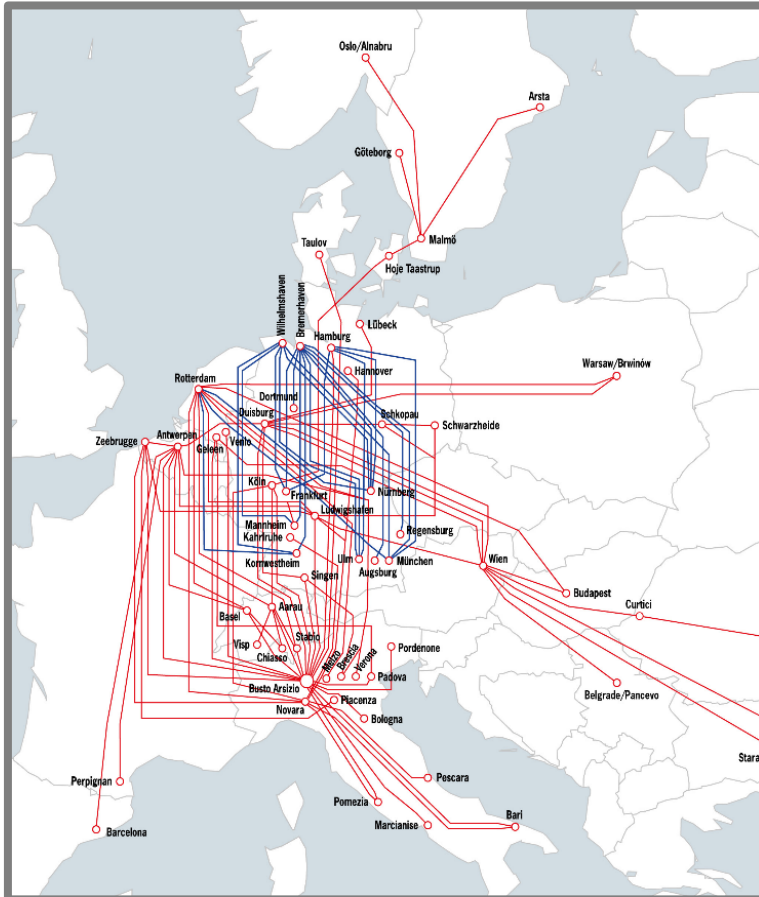




THE STORY

1. **INTRO** – shaping the future of intermodality.
2. **CONNECTIVITY** – How 2work together.
3. **COMMUNICATION** – How 2organize added value in a Babylonian Tower.
4. **RESILIENCE** – What we need is what we get!

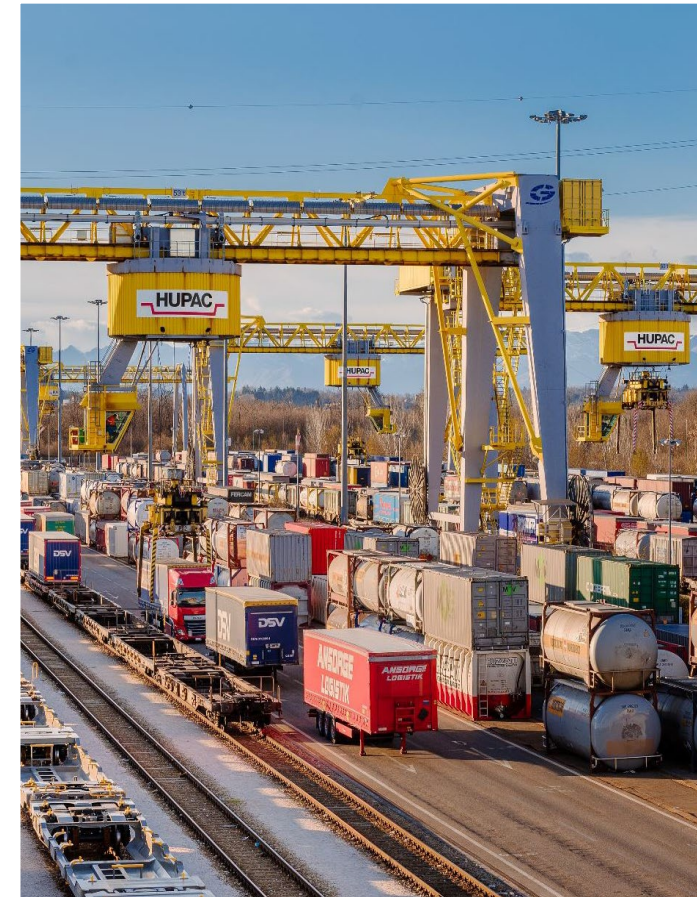
975.000
Consignments
Shifted on rail in
2023



130 trains
per day



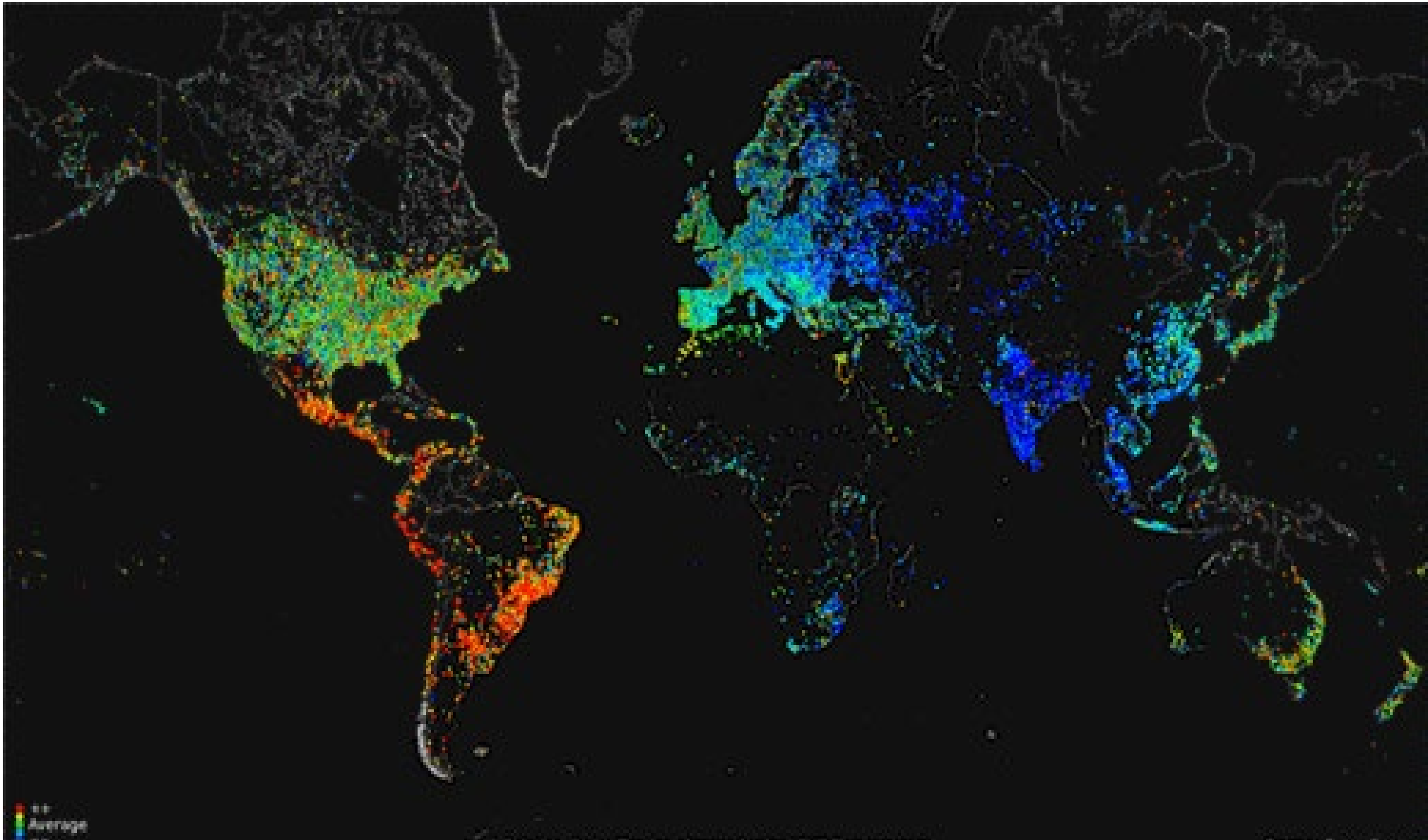
1,4 Mio.
tonns CO₂
Saved in our
network



8.500 Waggon
fleet fully nose
reduced

Working together – how 2create CONNECTIVITY.

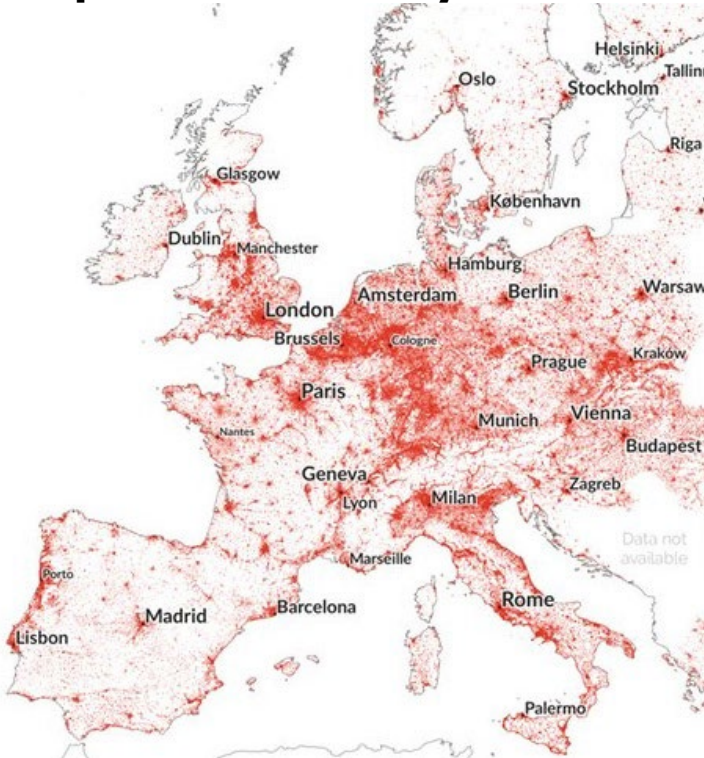
CONNECTIVITY



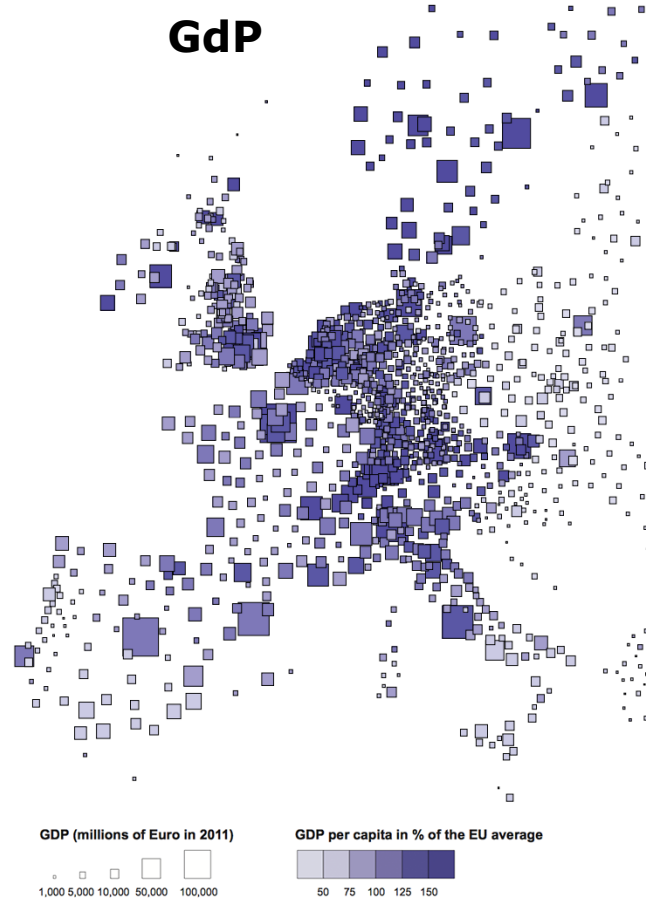
The European industrial and urban artery with its old grown industries is looking for **CONNECTIVITY**. Biggest urban and industrial hotspots are along the North South Corridor.

CONNECTIVITY

Population density



GdP

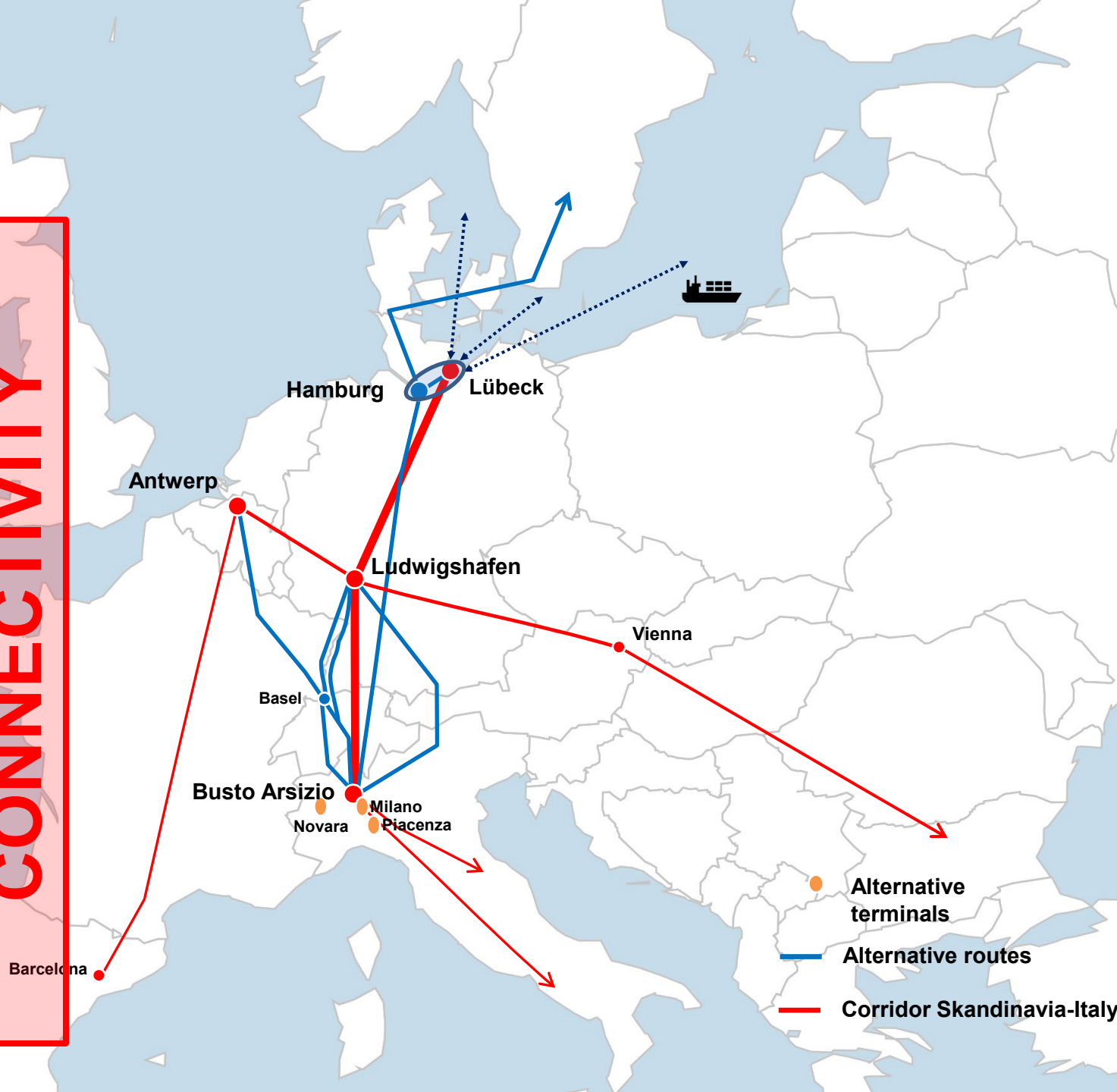


Remark:

- Added to that there are areas within North (Scandi) Southeast (Romania) East (Poland) and Southwest (Spain). All these areas are connected to the blue banana.
- The industrial legacy of Europe is spread all over the continent a powerful conveyer belt like rail – could be a helping hand.
- The freight mix and the new structure is giving intermodal a kind of mass good orientation.

SOURCE: RFC 1

CONNECTIVITY



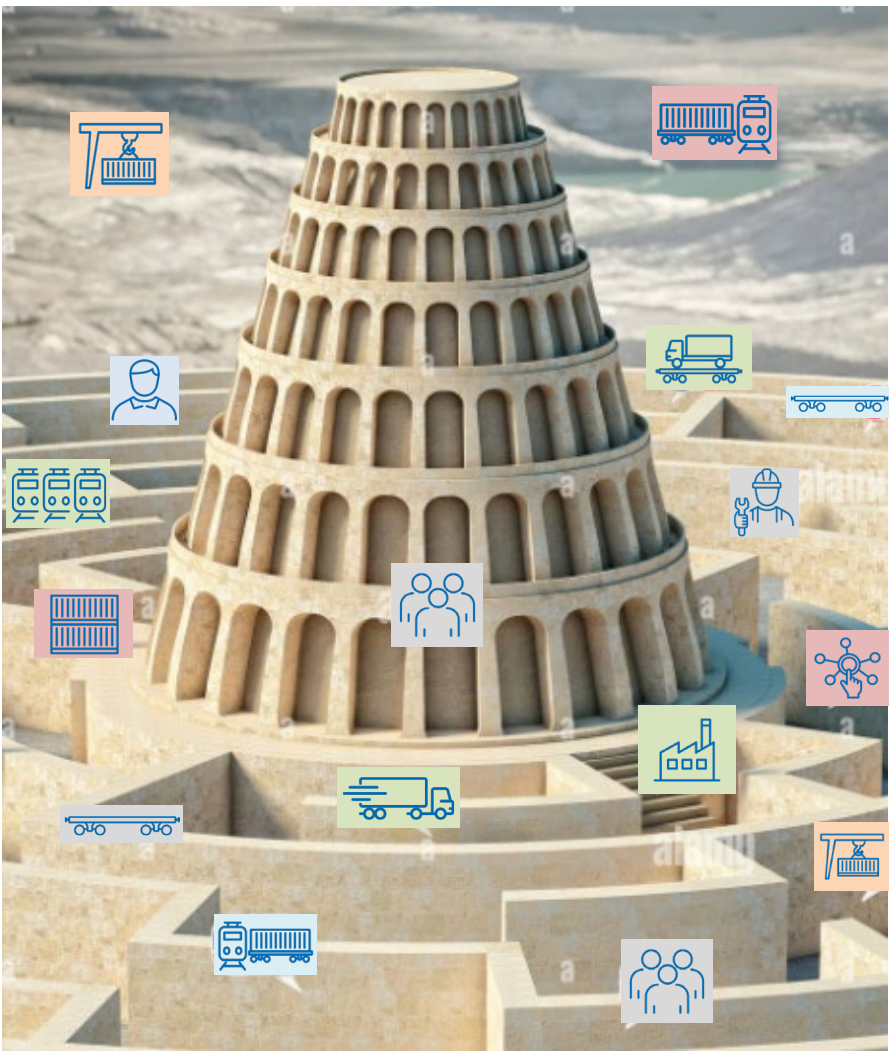
Let`s take a mutual look into our engine. 4creating connectivity many things have to be orchestrated. An example:

1. **First:** Idea of a pipeline
2. **Collaboration:** Not rail alone, many partners needed
3. **Hubs:** 2create linking power
4. **Bypasses:** the new key 2create resilience
5. **AND:** Don`t do everything alone!

DXI DATA HUB

If you want to do intermodal, an **easy entrance** into our eco system and an **easy onboarding** is needed. A Data Com Hub to create more transparency and productivity inside the intermodal eco system is key. **Result:** Less work 4scheduling and planning & more time to be creative.

COMMUNICATIONS



Challenge Combined Transport in Europe

- ➔ 10 Mio. Consignments per year
- ➔ 1000 actors, 100 different languages

DXI – constructed from market used by market

- ➔ Easy portal into system
- ➔ Easy Communication
- ➔ **Realtime Visibility** along value chain
- ➔ Higher productivity due to **Machine-to-Machine data exchange**

Development 2ramp up & 2be established in market

- 2017 research project KV4.0 subsidised in GE
- 2022 Ramp up into market operator: DXI GmbH
- today: first 30 User (incl. testimonials)
- **15 Mio. Data sets for 1.2 Mio. Consignments exchanged**

MEASURES to improve intermodal reliability in 2025








RESILIENCE capa

Hupac is managing **the new normal** with a **resilience-oriented production system** with the aim of preventing, responding to and quickly recovering from the day2day impacts.

Area	Measure	Implementation
	Relieve congested German rail infrastructure in the Rhine Valley by shifting more trains Belgium ⇌ Italy to the left Rhine bank corridor through France via Metz-Basel	Q1 2025
	Planning and preparation of traction diversion routes with the relevant railway undertakings for major planned infrastructure works on the corridors at least 6 months in advance, e.g. > Gäubahn-Singen > Alsace, left Rhine > Ruhr-Sieg	2025 ff
	Recover of possible weekday backlog by planning of higher traction capacity at weekends and longer opening hours of terminals	Q1 2025
	Increase planned frequency of trains per week on major corridors, in order to reduce impact of delays	H1 2025
	With the support of industry associations (Cefic, VCI, BDI, UIRR, ECTA, ERFA), intervene with the German government and Deutsche Bahn to review the concept of complete closure of corridors for several months (e.g. "Korridorsanierung"). The transport capacity in each corridor under renovation must always be at least 80%.	Intervention in Q1 2025

MEASURES to improve intermodal reliability in 2025

RESILIENCE ops

Area	Measure	Implementation
	Make full use of network flexibility by using gateways and alternative terminals: <ul style="list-style-type: none"> > Gateway connection via Ludwigshafen, Köln, Busto Arsizio > Terminals Antwerp area with HTA, Combinant, Rotterdam RSC, Geleen > Terminals Rhein-Ruhr area with DGT, DKT, Köln Eifeltor, Köln Nord, Venlo > Terminals Milan area: Novara CIM and Boschetto, Busto Arsizio, Piacenza (2025), Milano Sm. (2026) 	2025 ff
	Deploy reserves of wagons and loco drivers : <ul style="list-style-type: none"> > backup compositions parked in crucial hubs for fast deployment in case of need > loco drivers “blue helmet” at disposal for deployment on core corridors 	2025 ff
	Strengthen day-to-day coordination with railway undertakings to maximise scarce capacity	2025 ff
	Concentrate on a few railway undertakings per terminal (pipeline concept), in order to facilitate flexible use of rail resources in case of delays	2025 ff
	Further standardisation of wagon compositions in order to improve the flexible use of compositions	Q3 2025
	Installation of additional parking sidings along the corridor (Basel, Karlsruhe, Offenburg, Chiasso), to park trains for rapid resumption in the event of disruptions.	H2 2025
	Installation of parking areas around terminals to relieve congestion in the event of disruption	Q2 2025

We are managing the new normal

We all know about the positive impacts of intermodality. Nevertheless heavy impacts are the reality and will not disappear. Inside our collaborative eco system we are organizing the core corridors more resilient. Our **actions** are:

- Create **Bypass Capacity** also via different countries
- Organize **reserve**: Terminal, Waggon, Locomotives, Capacities
- **Safeguard weekly capacity** on corridors to overcome «in-week-impacts»
- Strengthen the **collaboration between the various railway undertakings** to better utilize operational reserves
- Give **visibility** about what we are doing
- Create **added value** with an easy com hub like DXI

IN A DISRUPTED ENVIRONMENT WE ARE READY TO SHIFT MORE OF YOUR UNITS INTO THE INTERMODAL ECO SYSTEM.

The power of intermodality.



We are shaping together the future of intermodal transport.

THX, MRC, GRZ, DNK





Deep dive into an example of successful intermodal cooperation



LKW Walter – Bertschi



Bertschi

- 88% of to-km Intermodal
- 15 Chemical Hubs, Rail-Access, Company Trains
- 46.000 Liquids and DryBulk Containers, 1.000 Trucks
- 270.000 tons of CO2 reduced p.a. D2D Supply Chains
- EcoVadis: Gold

LKW Walter

- 1,7 million shipments per year (600K Intermodal FTLs/year)
- 15.000+ trailers
- 300 Intermodal departures per day
- +250 intermodal connections
- 330.000 tons of CO2 reduced p.a.

SLOVENIA / CROATIA.

- Benelux
- Germany
- Great Britain
- Ireland
- Austria

●—● Rail (CO₂ reduction)
●—● Short Sea (CO₂ reduction)
→ Trailer-Trucking



Common problem - common solution



Issue: missing intermodal capacity towards Slovenia

- Both parties lack of critical volumes for a company train
- No initiative in the market to solve this issue
- Bulk containers don't allow full length utilization / Semi-trailers don't allow full weight utilization

Common problem - common solution



Solution: shared block train Duisburg – Ljubljana

- Strong similarities: family-owned companies / a strong vision for intermodal transportation / willing to take risks / complementary business models
- LKW Walter and Bertschi join-up with Rail Cargo Group
- Capacity increase by more than 60% since its initial introduction



What is needed to keep this kind of a solution running?

- Trust in the partners and transparency
- Active performance monitoring and needs for the future
- And most important: resilience and endurance in challenging periods



What is needed to develop further similar solutions?

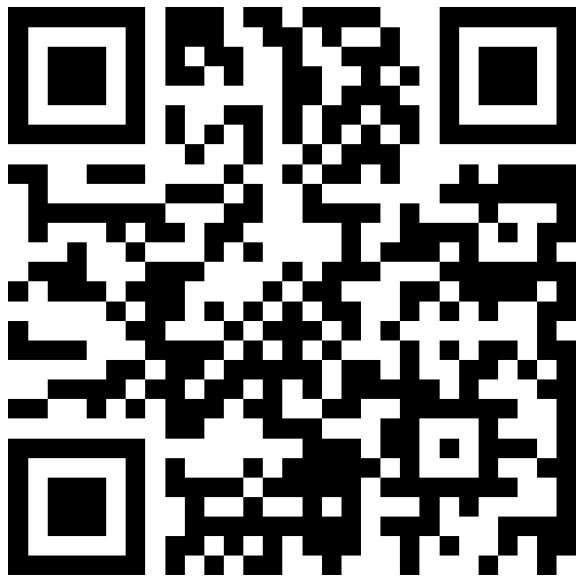
- Challenge your Supply Chain: combine packed and bulk
- Challenge your Network: stable volumes but not enough for a company train
- Invest in your network, in the end it's a people business

Questions?





Scan the QR code to access slido



**Or raise your hand
and speak up!**



INTERMODAL TRANSPORTATION

a way to meet 3 future challenges!



Thank you!



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