



intermodal4good
connected, smart, emission-free

Transport Logistic, 6 May 2021

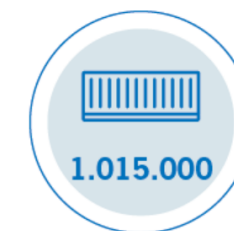


Welcome!

- > Michail Stahlhut, CEO Hupac Group
- > Bernd Decker, CEO ERS Railways
- > Alessandro Valenti, Director Shuttle Net West, Hupac Intermodal
- > David Aloia, Head of Shuttle Net North-East, Hupac Intermodal
- > Renzo Capanni, Director Shuttle Net South-East, Hupac Intermodal
- > Prof. Wolfgang Stoelzle, Member of the Board, Logistics Advisory Experts

Solutions for the future of logistics >>

We connect Europe. We go intercontinental

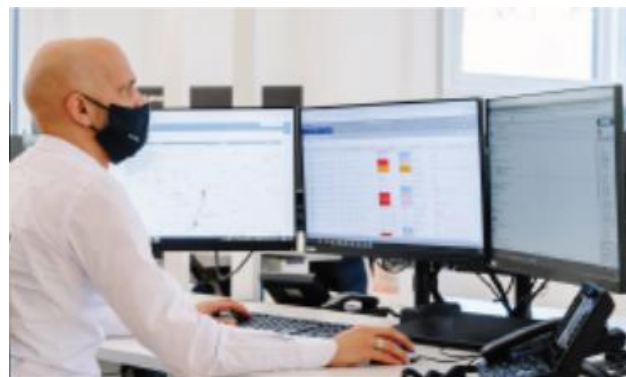


**Road consignments
shifted to the railways
1,913,00 TEU**



**Trains per day
operated in the
Hupac Group network**

Own assets, innovative technology



Wagon modules
for the transportation
of loading units



Loading units
handled in the terminals
of the Hupac Group

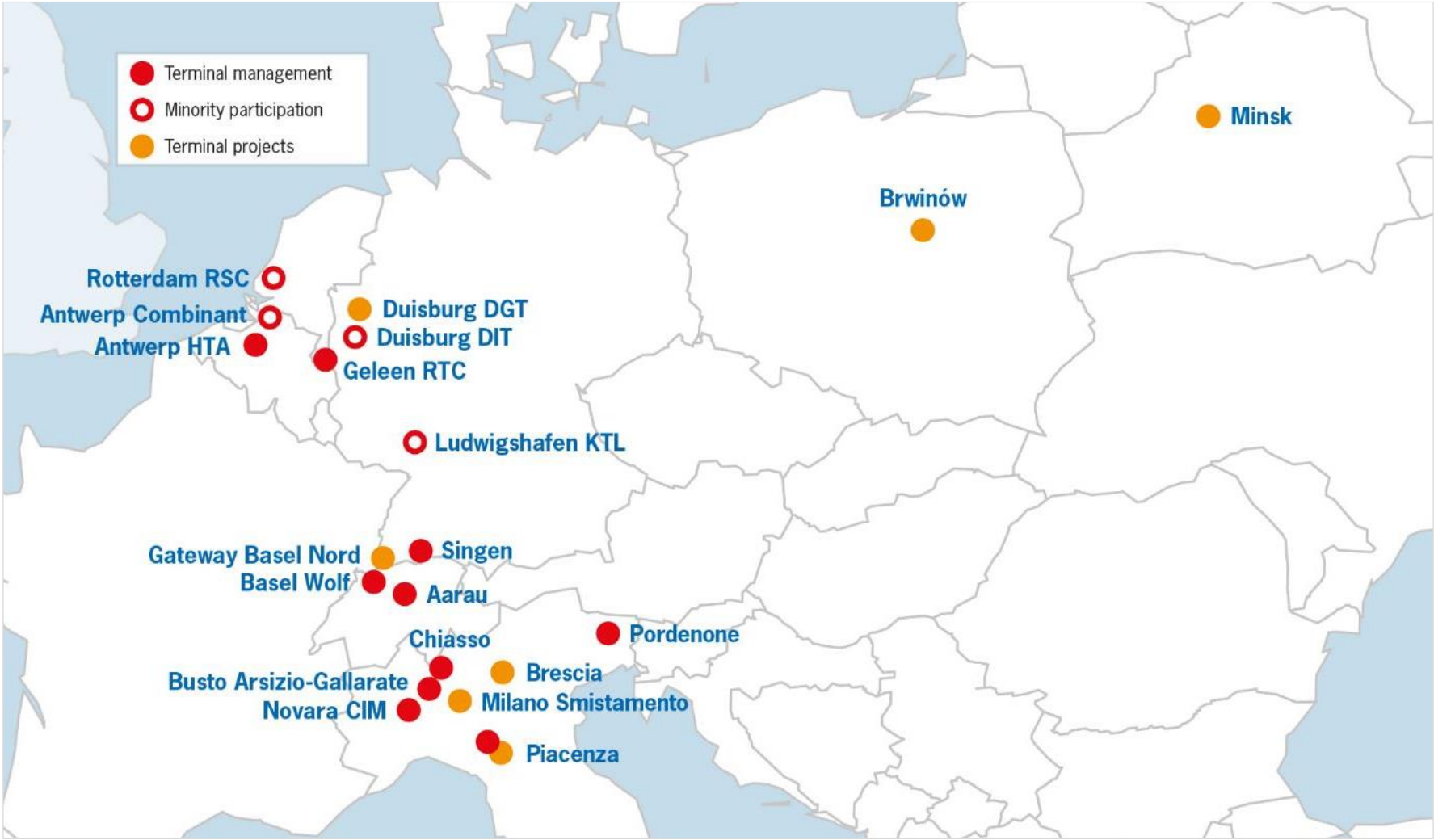


Staff members
in the 23 companies
of the Hupac Group



Trucking services
performed for customers
in the maritime sector

Terminal investments to secure capacity

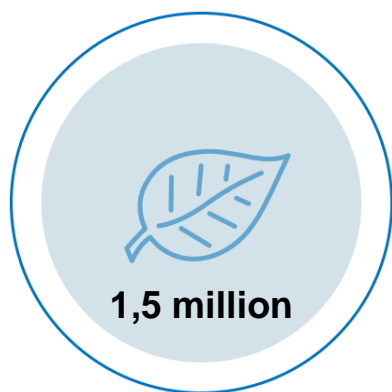




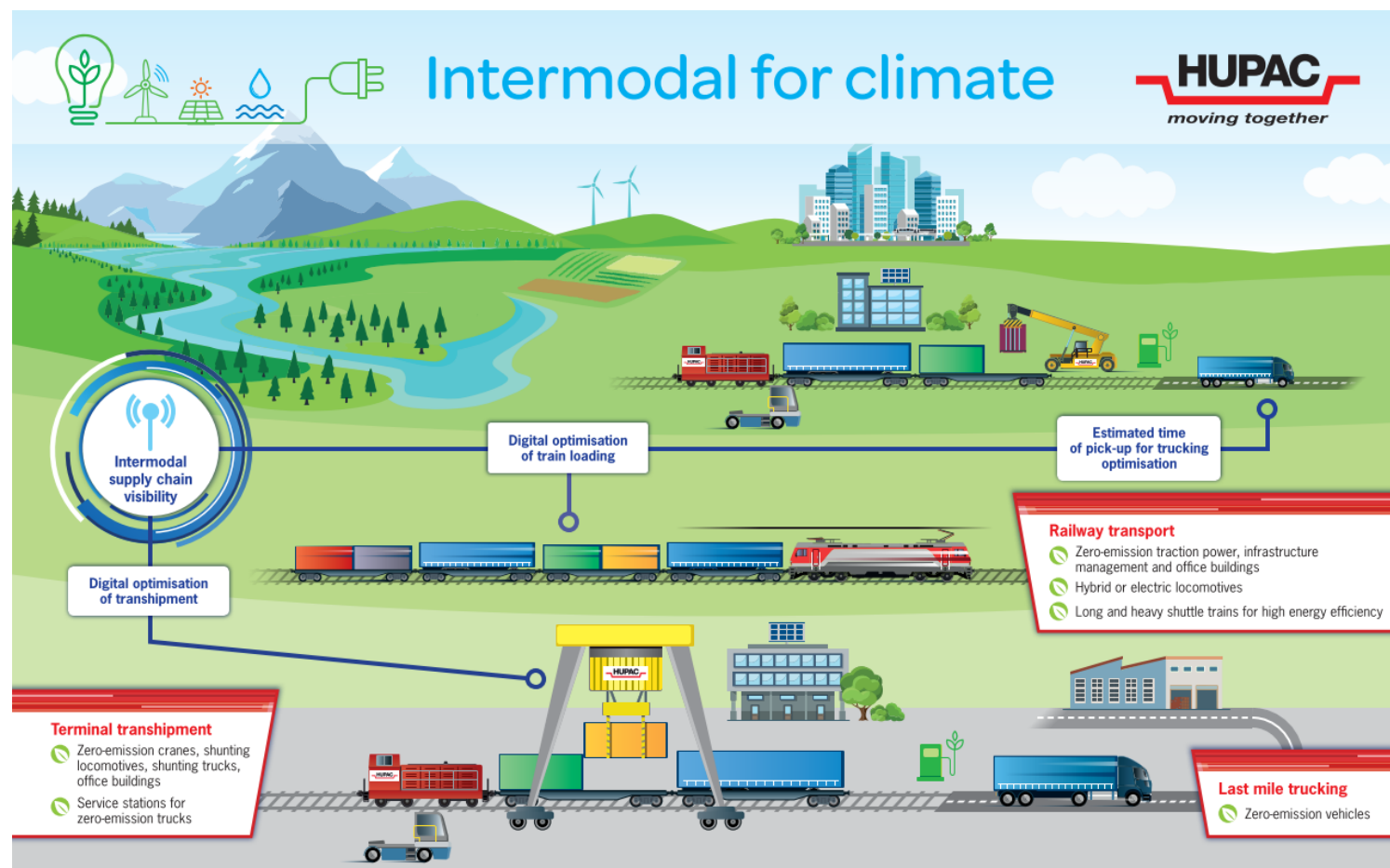
Our contribution to climate protection

Tomorrow
with European Green Deal

Today



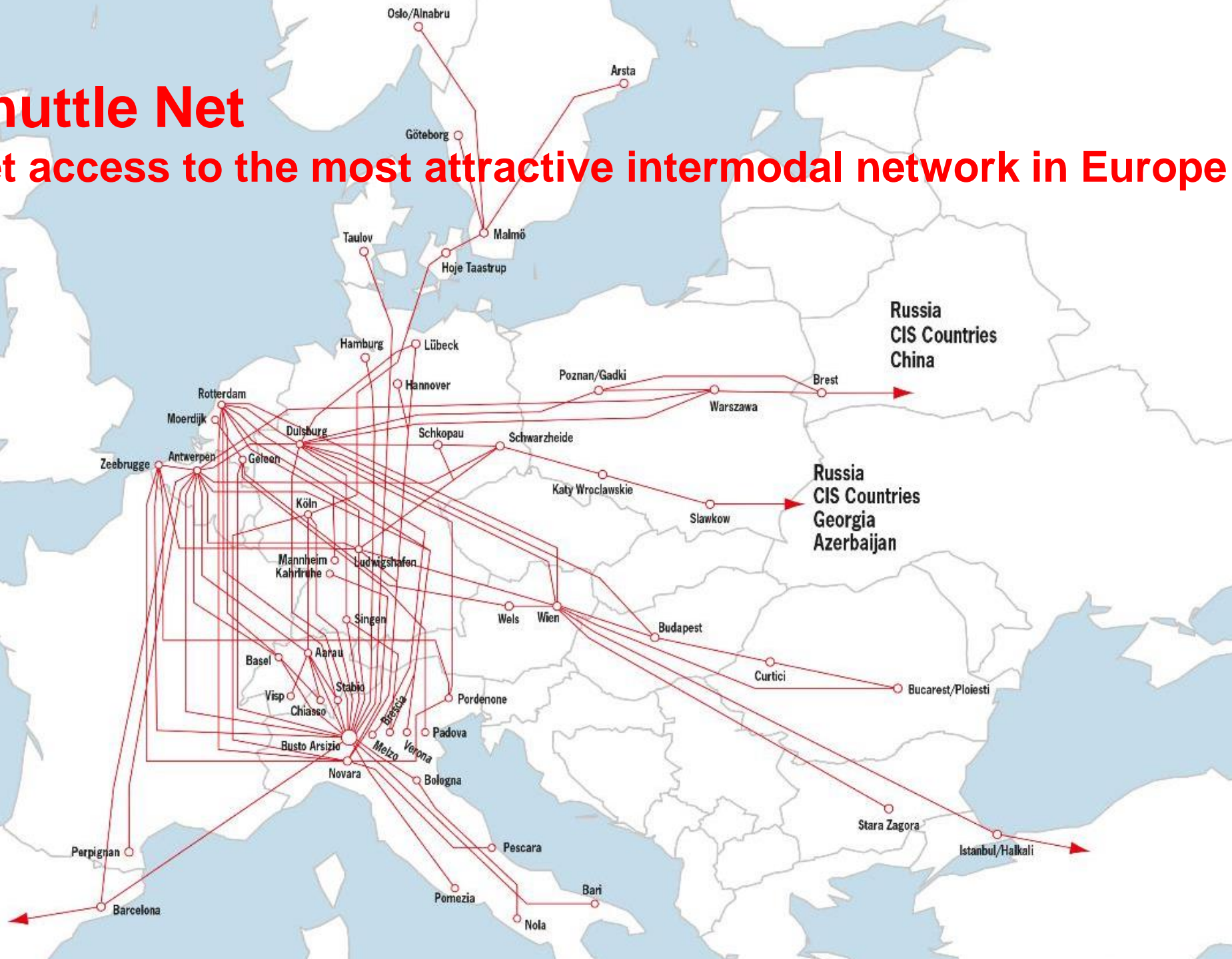
Tons of CO₂
saved in the network
of the Hupac Group





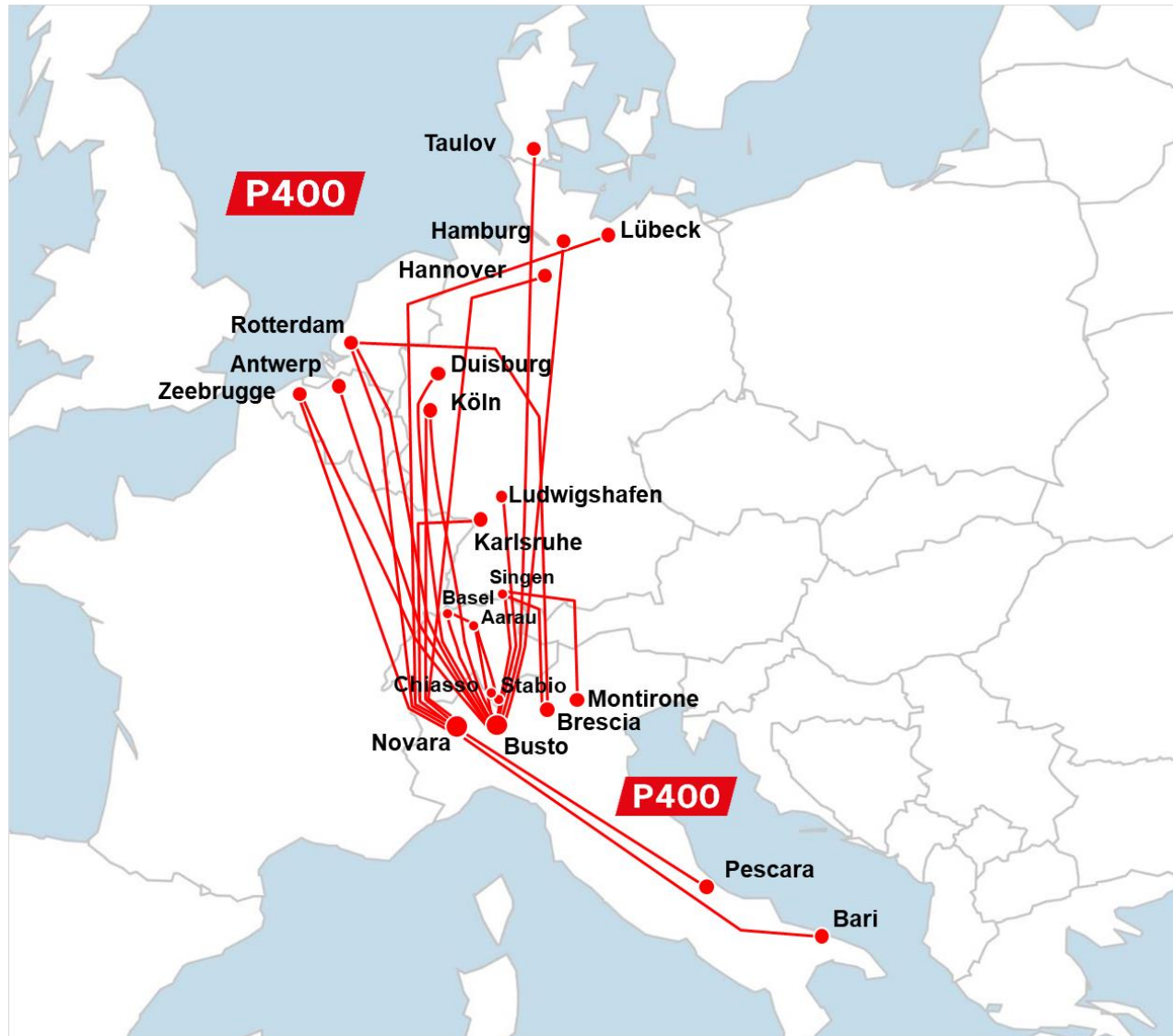
Shuttle Net

Get access to the most attractive intermodal network in Europe



P400 via Switzerland

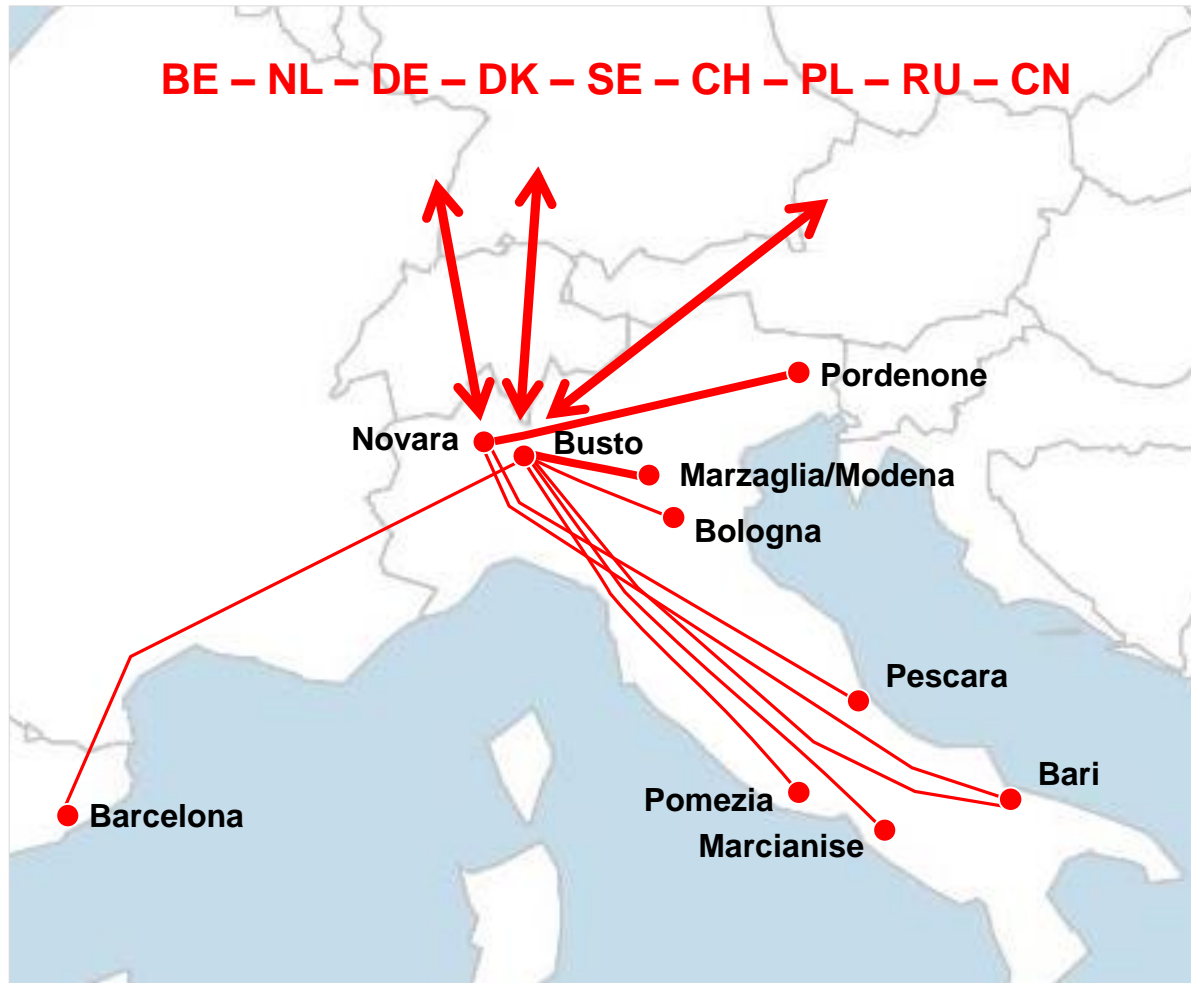
Growing network for semitrailers via the Alps



	Roundtrips/week
> Köln Eifeltor ⇄ Busto	11
> Köln Nord ⇄ Busto	11
> Köln Eifeltor ⇄ Novara	5
> Duisburg ⇄ Busto	8
> Ludwigshafen ⇄ Busto	24
> Karlsruhe ⇄ Domo / Novara	5
> Rotterdam RSC ⇄ Busto	14
> Rotterdam RSC ⇄ Novara	5
> Antwerp HTA ⇄ Busto	14
> Zeebrugge CldN/C.Ro ⇄ Novara	9
> Zeebrugge P&O ⇄ Busto	8
> Hamburg ⇄ Busto	5
> Hannover ⇄ Novara	3 → 4
> Taulov ⇄ Busto	4
> Lübeck ⇄ Novara	1
> Basel ⇄ Busto	5
> Aarau ⇄ Busto	5
> Rotterdam ⇄ Brescia	4
> Basel/Aarau ⇄ Stabio/Chiasso	10
> Novara ⇄ Pescara	6
> Novara ⇄ Bari	3
P390 services	
> Singen ⇄ Brescia	5
> Singen ⇄ Busto	10
> Singen ⇄ Montirone	5

Network Italy

Going intermodal from north to south



NEW!

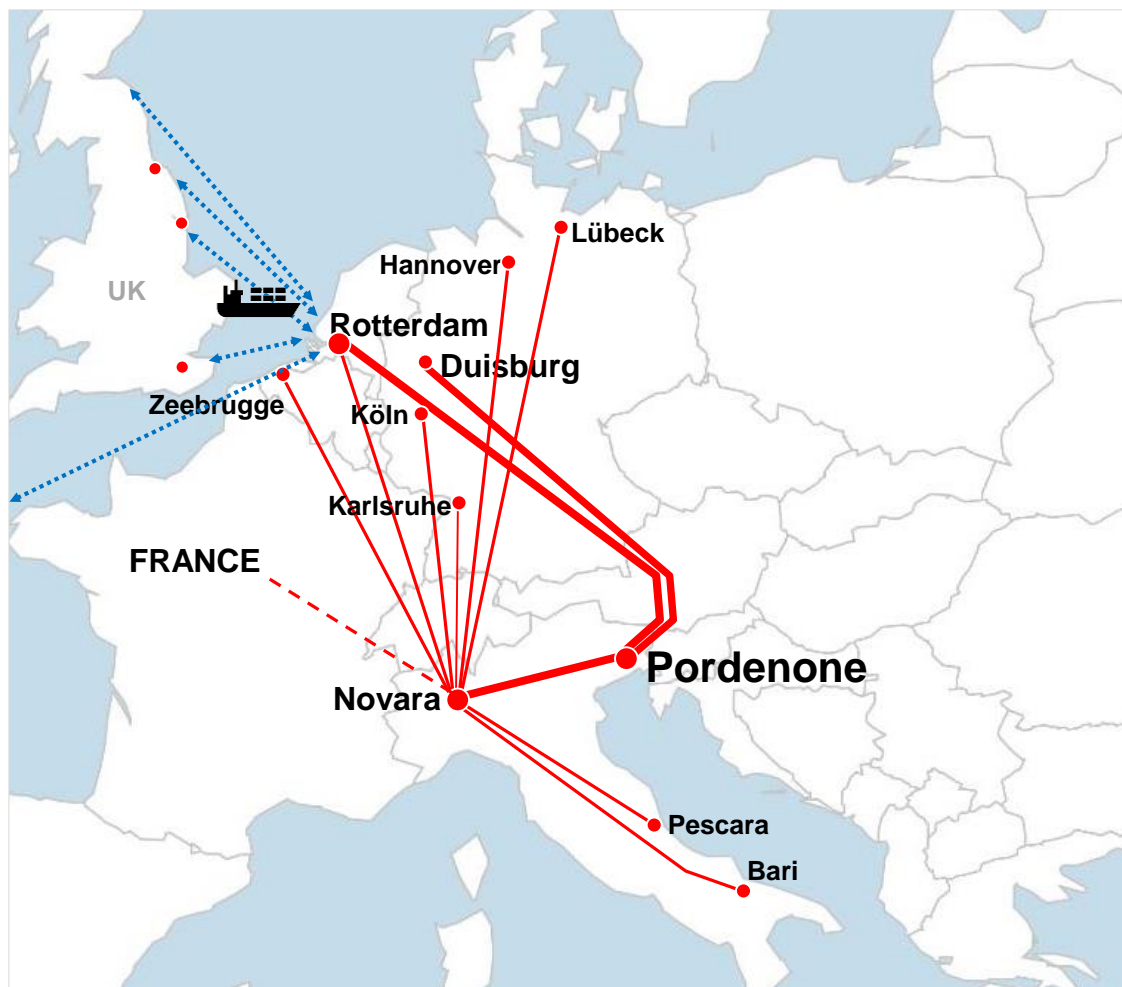
Roundtrips/week

May	Novara ⇌ Pordenone	3
September	Busto Arsizio ⇌ Marzaglia/Modena	3

Busto Arsizio ⇌ Bologna	5
Busto Arsizio ⇌ Pomezia	8
Busto Arsizio ⇌ Marcianise	3
Busto Arsizio ⇌ Bari	5
Novara ⇌ Pescara	6
Novara ⇌ Bari	3

Network Pordenone

Linking north-east Italy to the European intermodal network



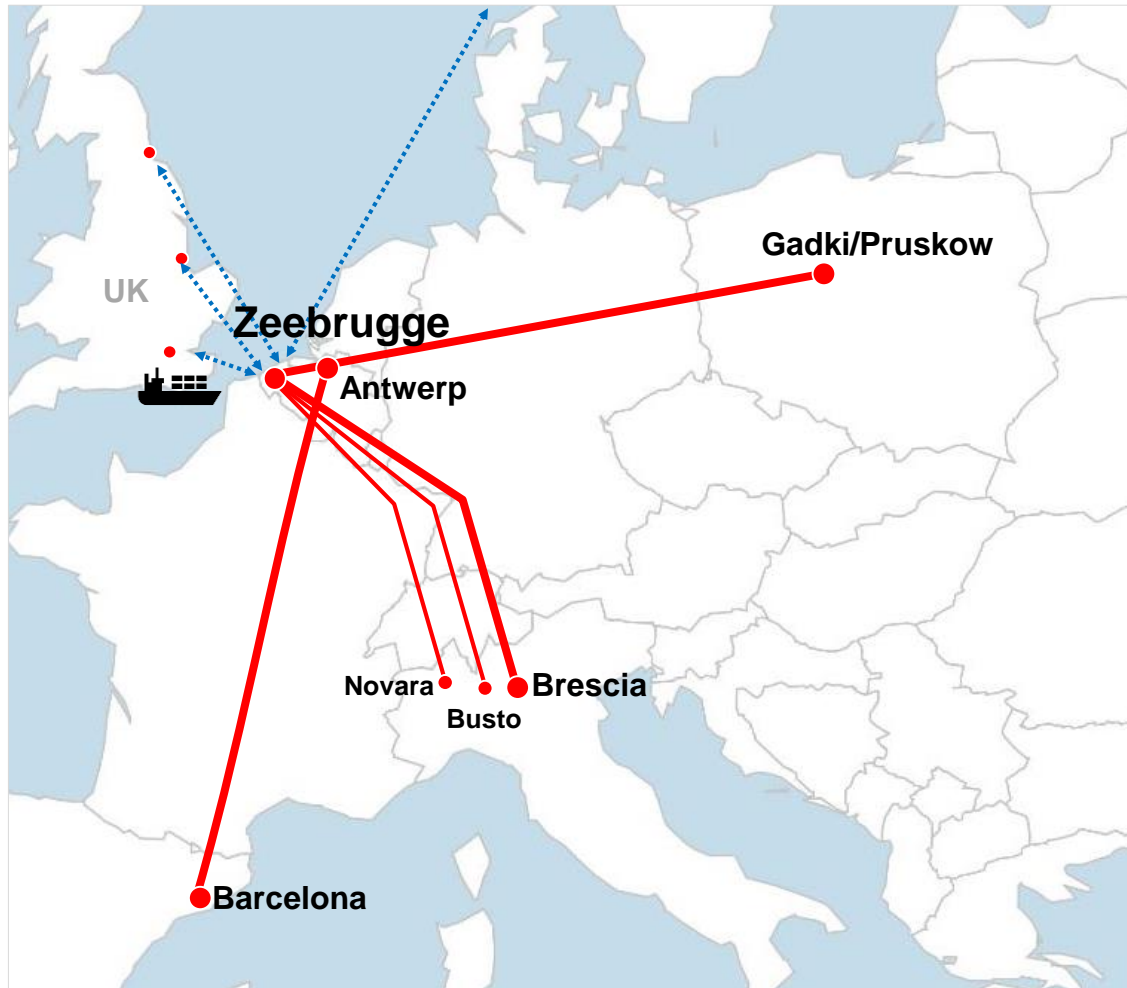
NEW!

		Roundtrips/week
May	Pordenone ⇄ Novara	3
June	Pordenone ⇄ Rotterdam C.Ro	3
Since 2020	Pordenone ⇄ Duisburg	2



Network Zeebrugge

Adding service for UK & short sea



NEW!

Roundtrips/week

June	Zeebrugge ⇄ Brescia	2
June	Zeebrugge ⇄ Barcelona via Antwerp	5
September	Zeebrugge ⇄ Gadki / Warsaw via Antwerp	3



Network Singen

Full offer for continental and maritime transport



NEW!

Roundtrips/week

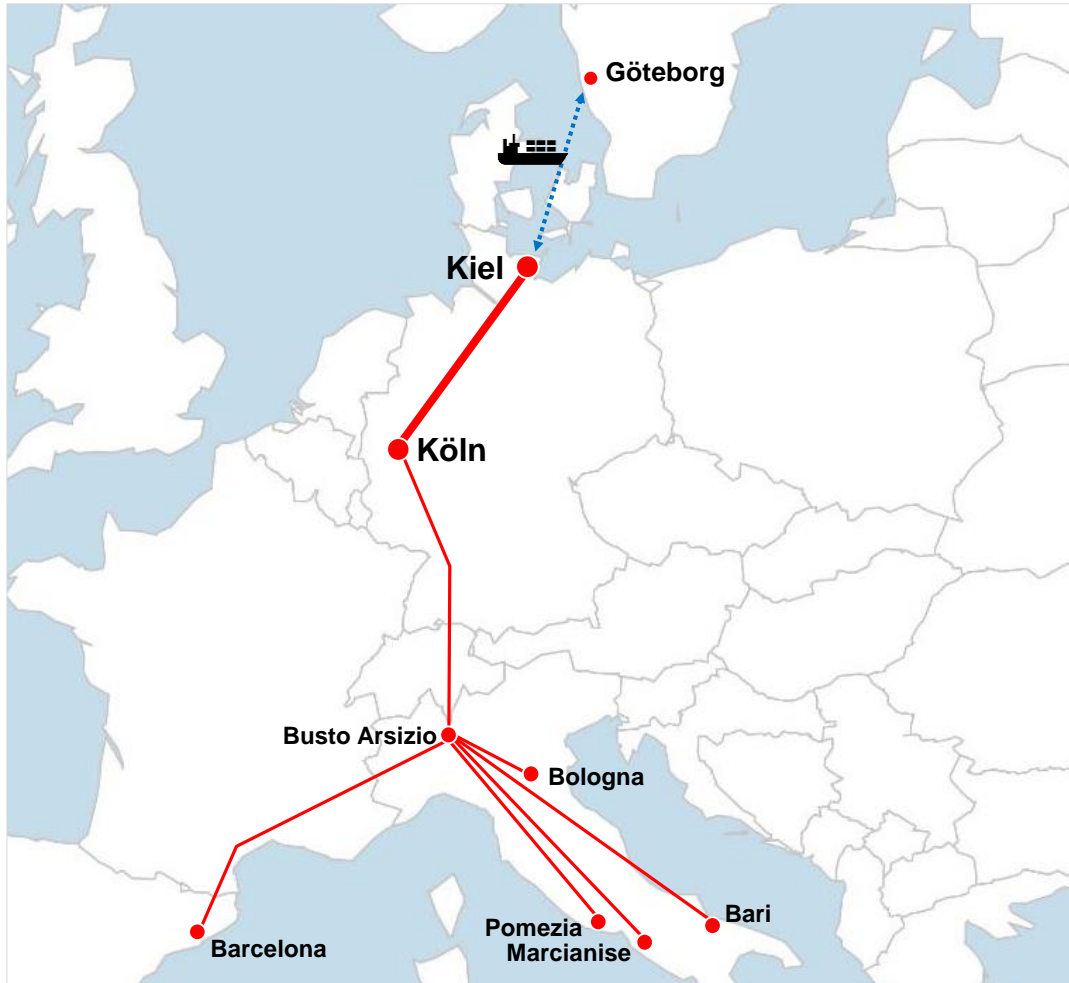
September Singen ⇄ München

2



Connecting the Baltic sea

Intermodal from Italy/Spain to Scandinavia



NEW!

July

Köln ⇄ Kiel
+ gateways Italy/Spain

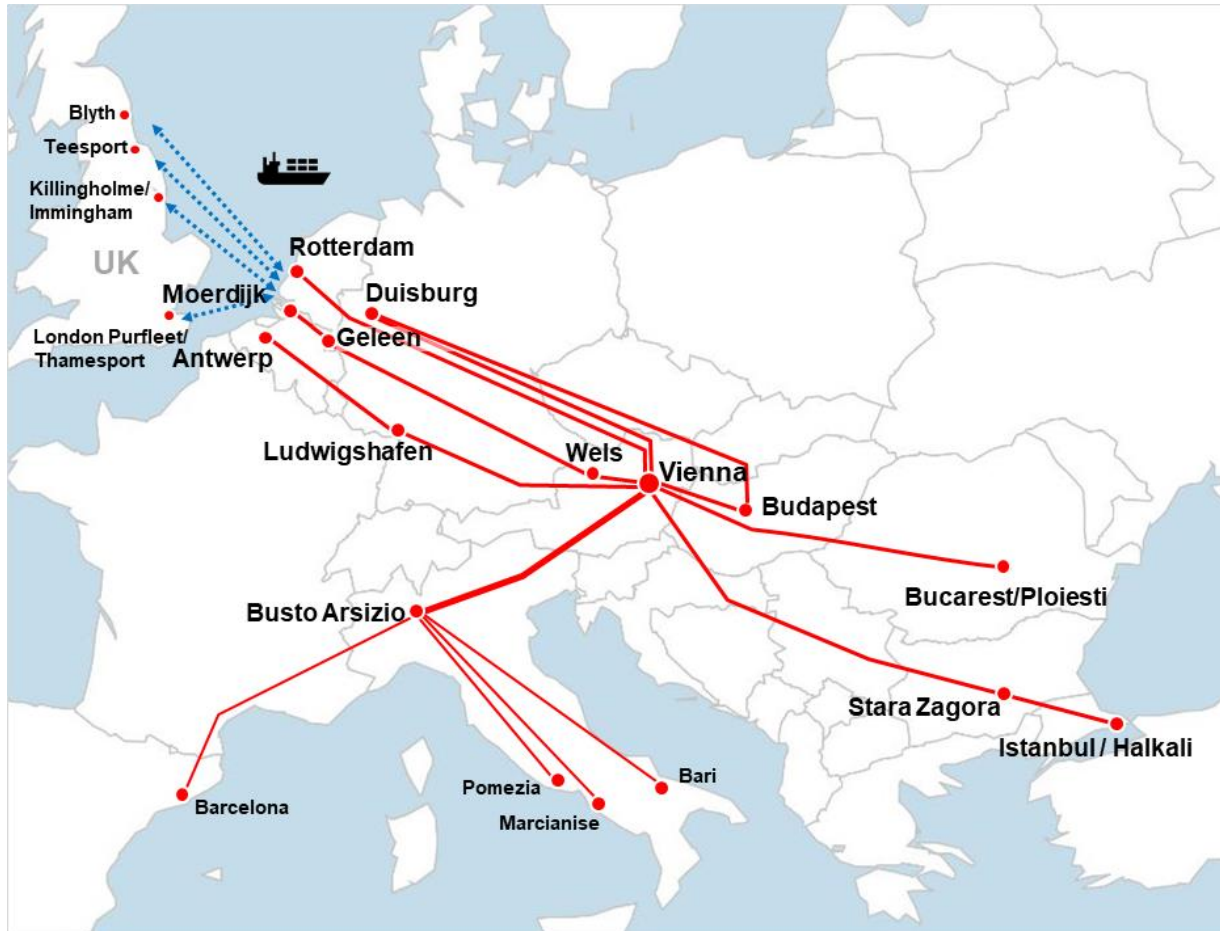
Roundtrips/week

3



Network South-East Europe

More departures, new interlink with Italy/Spain



NEW!

June	Frequency increase on all products	Roundtrips/week
	Duisburg ⇄ Vienna	6 → 7
	Duisburg ⇄ Budapest	5 → 7
	Duisburg ⇄ Halkali	3 → 4
	Duisburg ⇄ Ploiesti	1 → 2
	Rotterdam ⇄ Vienna	4 → 5
	Rotterdam ⇄ Budapest	4 → 5
	Rotterdam ⇄ Halkali	3 → 4
	Rotterdam ⇄ Ploiesti	1 → 2
	Ludwigshafen – Vienna	2
	Ludwigshafen Budapest	2
	Ludwigshafen – Halkali	2
	Ludwigshafen – Ploiesti	1 → 2
	Geleen ⇄ Vienna	2 → 3
	Geleen ⇄ Budapest	2 → 3
	Geleen ⇄ Halkali	2 → 3
	Geleen ⇄ Ploiesti	1 → 2
	Antwerpen ⇄ Vienna	2
	Antwerpen ⇄ Budapest	2
	Antwerpen ⇄ Halkali	2
	Antwerpen ⇄ Ploiesti	1 → 2

July New connection Busto A. ⇄ Vienna/ Budapest/ Halkali/ Ploiesti

Company Shuttle

Charter your own train and secure capacity at a competitive price

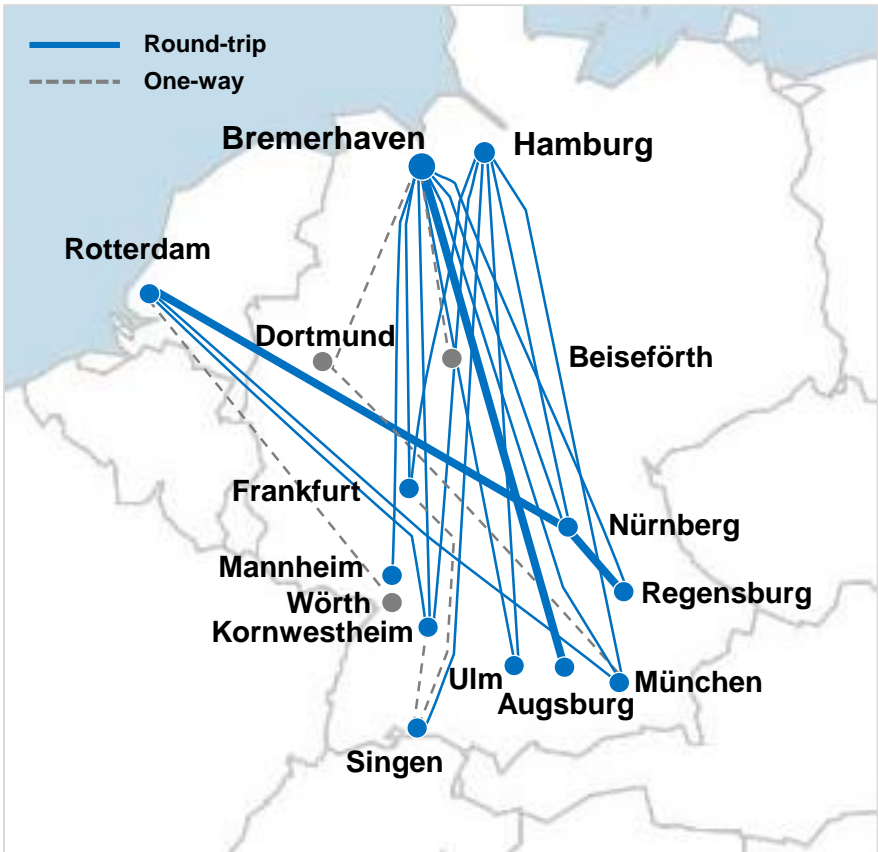
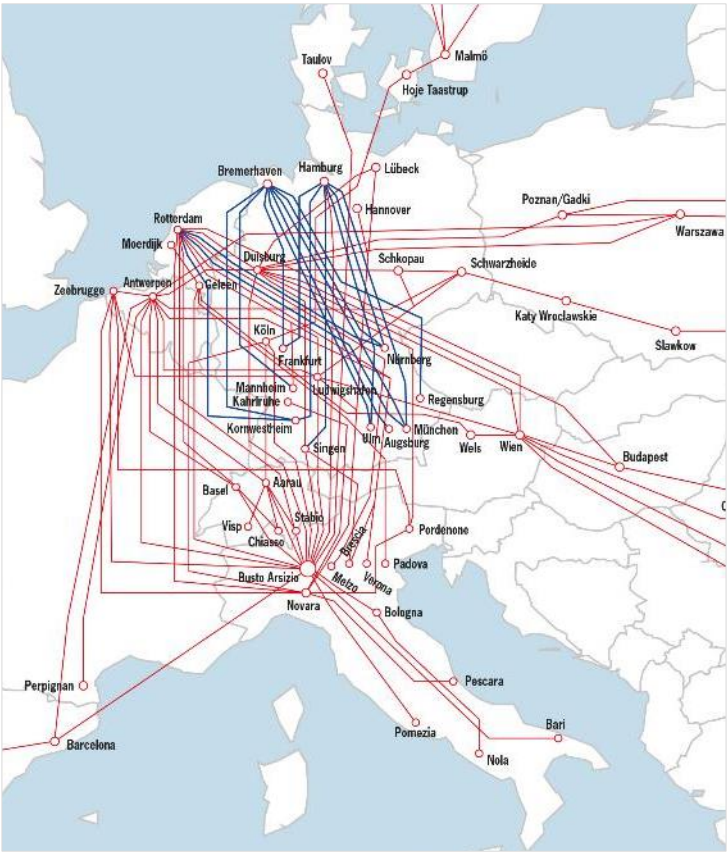


- Customized schedules meeting your specific needs
- Cost effective with fully automated standard procedures
- Take advantage of Hupac Group procurement power
- Own rail product – competitive advantage

When do you run your first company train?

Maritime Logistics

Growing network, combining strengths



			per week
Bremerhaven	↔	Frankfurt	2
Bremerhaven	↔	Mannheim	3
Bremerhaven	↔	Kornwestheim	5
Bremerhaven	↔	Ulm	5
Bremerhaven	↔	Nürnberg	5
Bremerhaven	↔	Regensburg	4
Bremerhaven	↔	Augsburg	3 → 5
Bremerhaven	↔	München	5
Bremerhaven	→	Dortmund	1
Dortmund	→	München	1
Hamburg	↔	Kornwestheim	10
Hamburg	↔	Ulm	10
Hamburg	↔	Nürnberg	6
Hamburg	↔	München	7
Hamburg	↔	Frankfurt	1
Hamburg	↔	Singen	2
Frankfurt	→	Singen	1
Rotterdam	↔	Nürnberg	3 → 4
Rotterdam	↔	Regensburg	2
Rotterdam	↔	München	3
Rotterdam	↔	Kornwestheim	3
Rotterdam	→	Singen	1
Kornwestheim	→	Singen	1





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Roadmap Combined transport in light of the European Green Deal



Prof. Dr. Wolfgang Stölzle

Member of the Board

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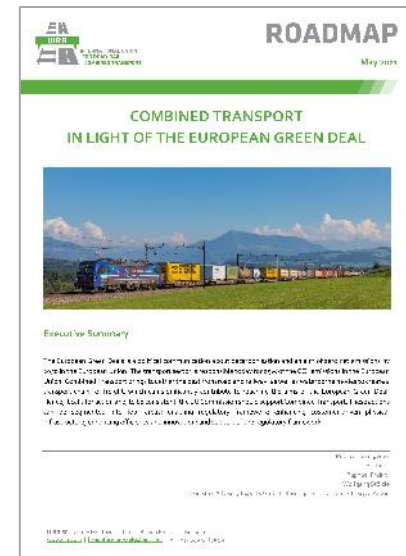
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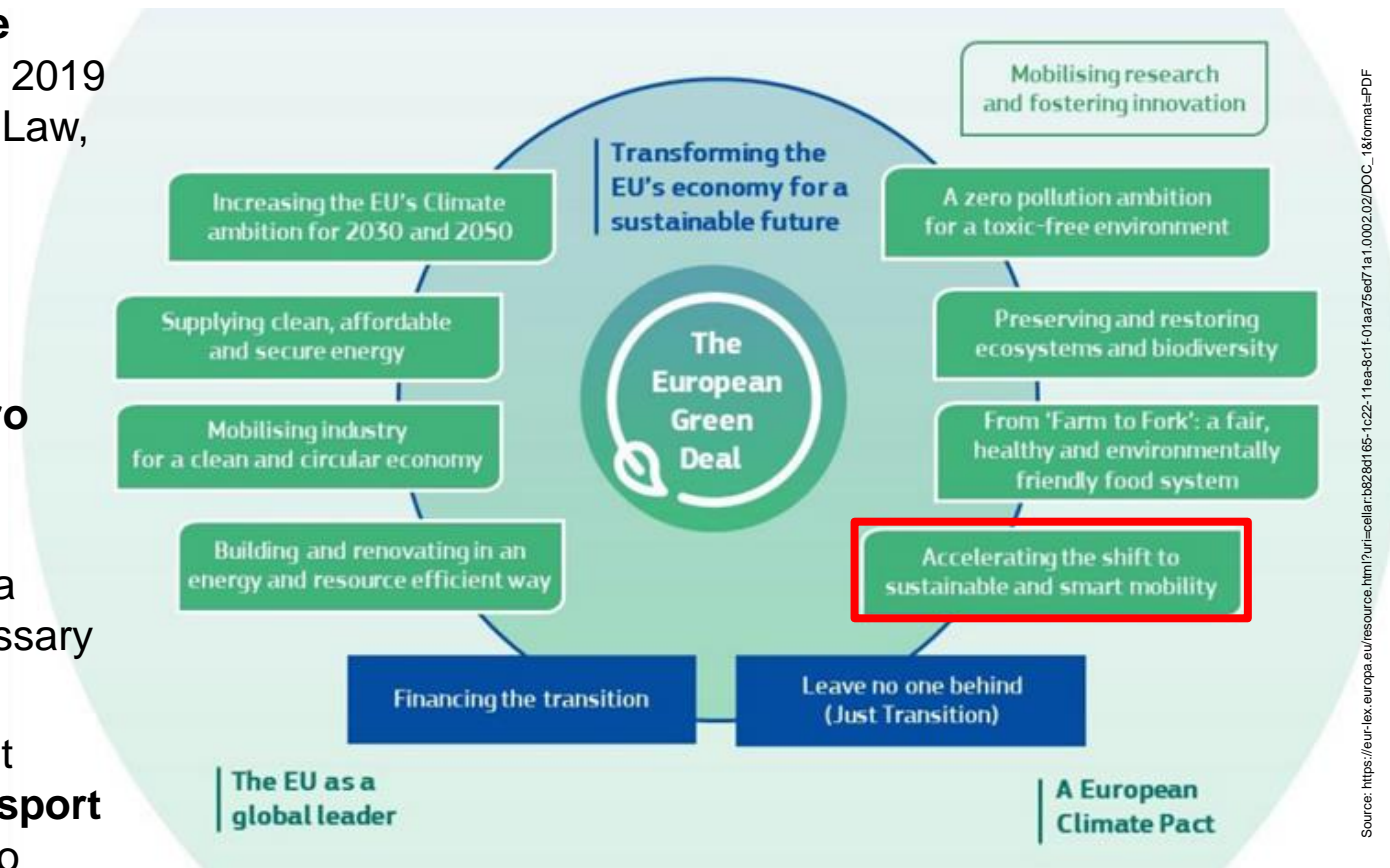
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Key facts of the European Green Deal

- The European Green Deal was **announced by the Commission President Ursula von der Leyen** in 2019 pursued by the proposal for the European Climate Law, which is expected to be adopted in June 2021.
- The European Climate Law prescribes a **55% CO₂ emission cut** (on the basis of 1990) and complete carbon-neutrality to be achieved.
- Measures are necessary to achieve the **aim of zero net emissions of greenhouse gases by 2050** in conjunction with economic growth.
- To achieve the aims of the European Green Deal, a **forceful shift from road to rail transport** is necessary according to the European Commission.
- Rail freight is projected to at least double its market share by 2050, which means that **intermodal transport must triple its volume** at the same time in order to reach the modal shift target – a realistic scenario based on recent growth figures.



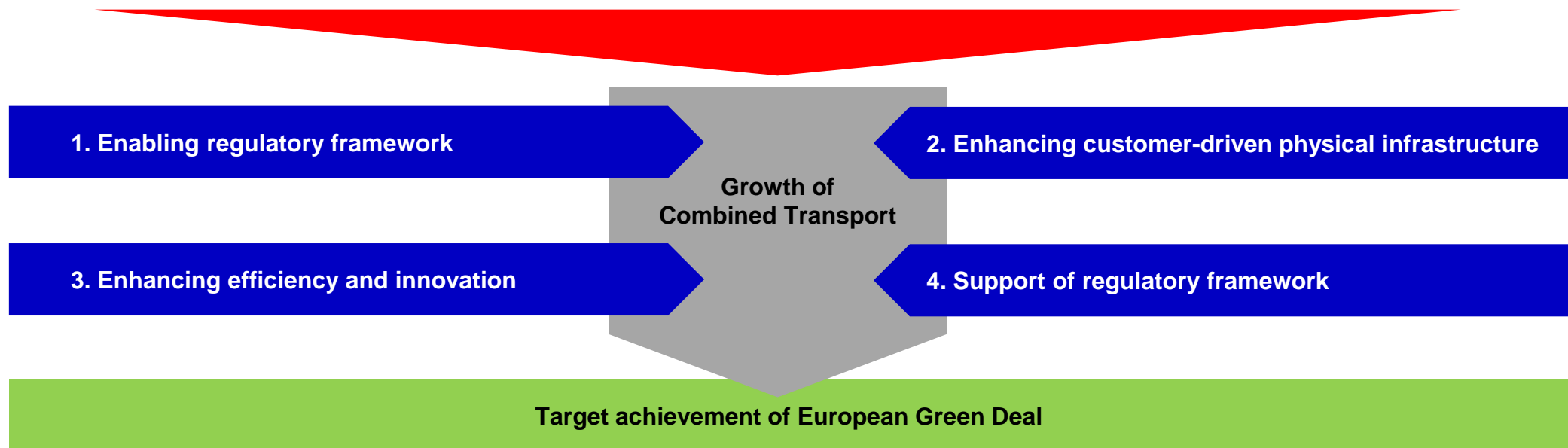
The imperative for actions to support Combined Transport

- A substantial explanation for the disadvantage suffered by Combined Transport can be attributed to the **insufficient internalisation of external costs** of road transport.
- Combined Transport will naturally grow as soon as a level regulatory playing field is in place. It has the **capability to further grow above average** compared to the whole transport market, which leads to desired green-house gas emissions saving.
- Hence, these observations lead to the identification of a **need for action** to support Combined Transport.
- For achieving an accelerated growth of Combined Transport, **several actors** need to take action.

Actor	Possible actions
Policy makers	<ul style="list-style-type: none"> ▪ Investments in infrastructure ▪ Reduction of cost of track access charges and/or the introduction of distance-based road tolls with total cost covering toll levels ▪ Introduction of subsidies ▪ Support of innovation
Infrastructure managers	<ul style="list-style-type: none"> ▪ Development of high quality infrastructure ▪ A fair allocation of trains paths between freight and passenger on the basis of greater social utility ▪ Support of high specification train operations: long and heavy trains that use the entire available loading gauge
Railway undertakings	<ul style="list-style-type: none"> ▪ Restructuration and modernisation ▪ Automation, telematics and digitisation ▪ Asset standardisation
Intermodal operators	<ul style="list-style-type: none"> ▪ Enhancement of digitalisation ▪ Investment in wagon technology ▪ Investment into rolling stock / intermodal wagons ▪ Investment in market development

Areas of action to support Combined Transport

Based on these considerations described before, **four areas of action** can be derived to support the growth of Combined Transport, which ultimately **contributes to the achievement of the targets** specified in the European Climate Law and the European Green Deal.



The areas of action for Combined Transport in detail (1/2)

- This area of action is concerned with **regulatory measures** to ensure a fair level playing field regarding rail and road. Hence, the following measures need to be implemented by **Member State governments** and the **European Commission**:

Area of action	Measures
1. Enabling regulatory framework	<ul style="list-style-type: none">▪ Reduction of differences in internalisation of external costs▪ Reduction of the Track Access Charges (TACs)▪ Reduction of administrative costs▪ Establishment of a burden-sharing of safety cost▪ Revision of passenger priority rules and timetables▪ Establishment of an open data policy▪ Reduction of access barriers to intermodal transport

- This area of action concerns measures that **enhance the physical infrastructure** necessary for further Combined Transport growth. These measures aim for higher productivity and quality of Combined Transport services in general and must be enforced primarily by **infrastructure managers**:

Area of action	Measures
2. Enhancing customer-driven physical infrastructure	<ul style="list-style-type: none">▪ Upgrade and extension of existing infrastructure▪ Speeding-up of planning and construction▪ Establishment of standardisation of technical rules and specifications▪ Supplement of terminal capacity via extension and construction▪ Usage of alternative handling systems in existing vertical systems

The areas of action for Combined Transport in detail (2/2)

- This area of action deals with measures that **enhance efficiency** and streamline the establishment of new of Combined Transport **services**. Thus, mainly **railway undertakings, intermodal operators, infrastructure managers and authorities** need to implement the following measures:

Area of action

3. Enhancing efficiency and innovation

Measures

- Digitisation of processes
- Deployment of up-to-date wagon technology
- Deployment of new traction capacities
- Execution of daily operation with green technologies
- Deployment of green electricity
- Combined Transport as part of urban logistics

- This area of action is concerned with measures that support the various directives Combined Transport is based on. Hence, primarily **European policy makers** need to put effort into the following measures, but **infrastructure managers, railway undertakings, and intermodal operators** need to support with their practical expertise:

Area of action

4. Support of regulatory framework

Measures

- Review of TEN-T Guidelines Regulation
- Review of Rail Freight Corridor Regulation
- Revision of Energy Taxation Directive
- Revision of the Combined Transport Directive
- Revision of Weights and Dimensions Directive
- EU road haulage rules in Combined Transport

Shaping the future of intermodal transport

- MORE connectivity**
 - > P400 semi-trailers: off the road, on our trains
 - > East and south-east Europe
 - > France, Spain, UK, Russia, China
- MORE easy access**
 - > Digital process/data management
 - > Supply chain visibility
- MORE quality**
 - > Terminal capacity
 - > Railway development





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Thank you!



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