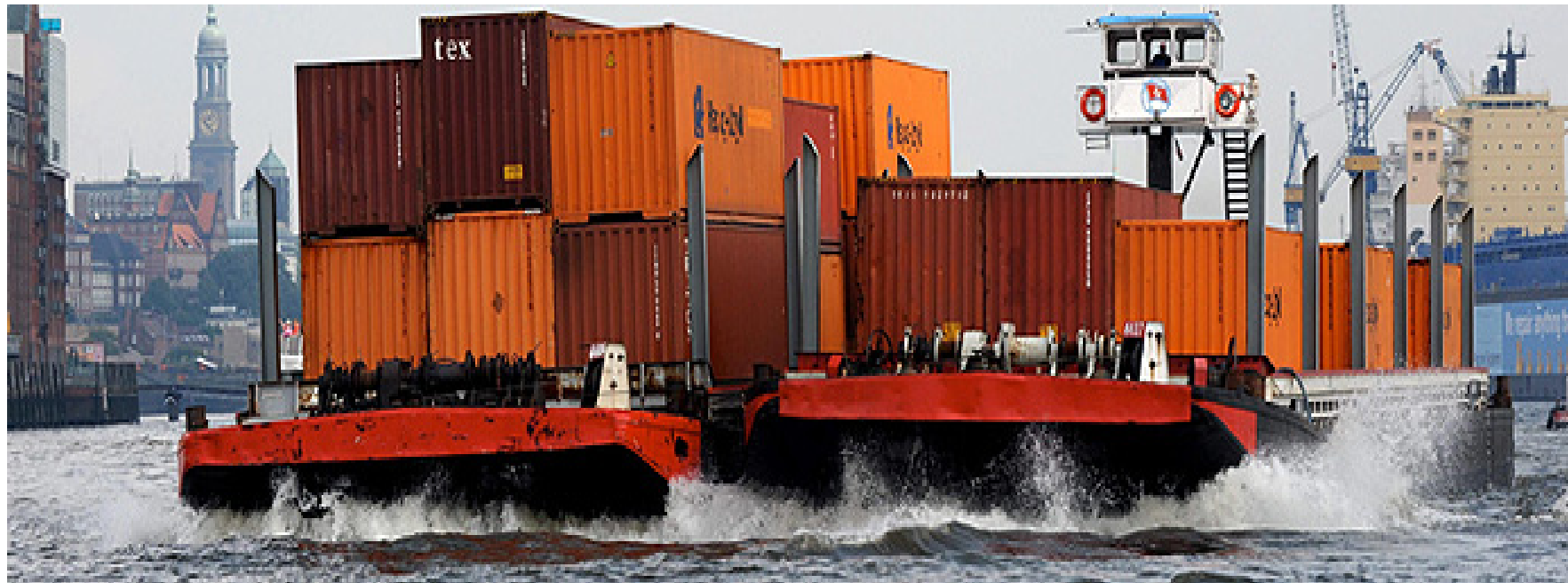


Bottleneck rail transport from and to the Czech Republic – barge transport as an essential and useful complement

Rolf Lack, 2nd president of the Vereins zur Förderung des Elbstromgebietes e.V.
Prague, 27th September 2011

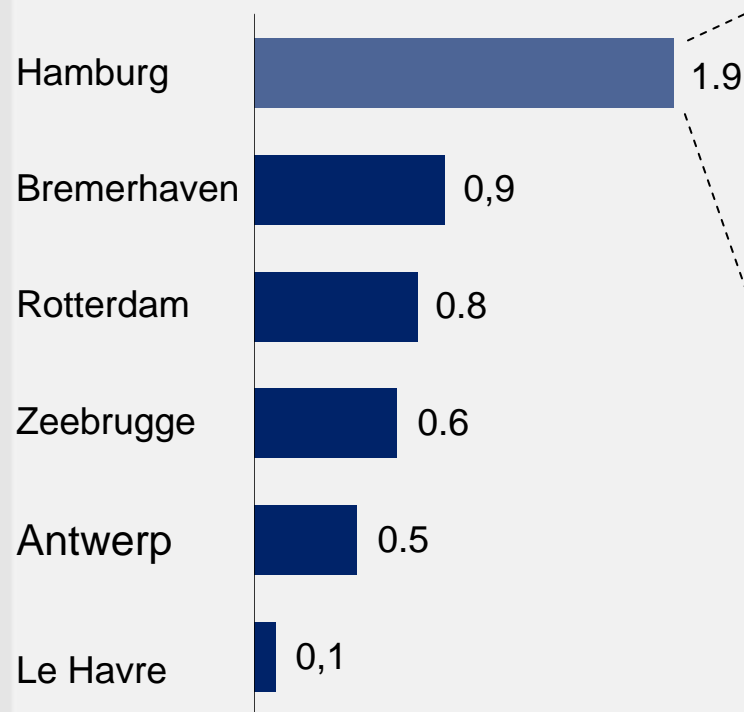


Agenda

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- Rail port Hamburg
 - Perspective
 - Inland navigation and its advantages
 - Conclusion
-

Hamburg is the leading rail port in Europe

Rail-volume of ports (2010*, Mio. TEU)



factor of success

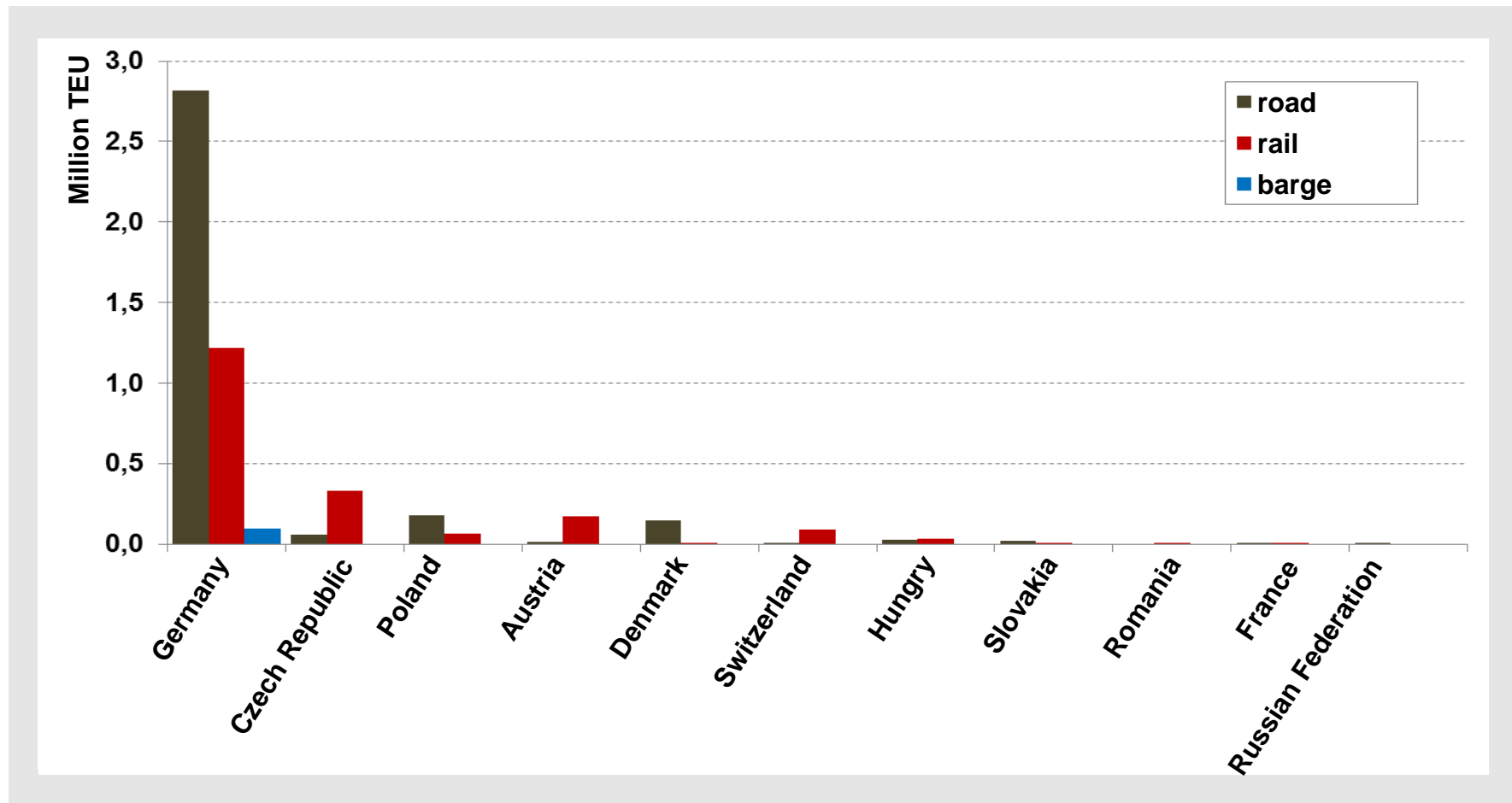


- Excellent **rail infrastructure** and **connections**
- **Hugh hinterland** of Hamburg allows long transport distances
- **Highly productive rail operators** offer intermodal services to/from Hamburg

* source: HHM (Antwerpen – 2009)

Hinterland traffic of the port of Hamburg 2010

The Czech Republic is the most important foreign hinterland region for Hamburg



* source: HHM

Rail transport exceeds volumes of 2008

Modal Split of the port of Hamburg since 2006

	2006	2007	2008	2009	2010
Hinterland traffic excl. feeder	4.850	5.390	5.451	4.650	5.290
Rail	1.588	1.830	1.892	1.579	1.930
Barge	90	92	119	93	93
Truck	3.172	3.468	3.440	2.978	3.267

Modal Split 2008 of the port of Hamburg and other North range ports separated by destinations

	to/from Hamburg		to/from other North range ports	
	Rail	Truck	Rail	Truck
Austria	94%	6%	71%	29%
Czech Republic	77%	23%	95%	5%
Hungry	68%	32%	96%	4%
Poland	37%	63%	89%	11%
Slovakia	50%	50%	96%	4%

source: HHM

source: HPA: „Prognose des Umschlagspotenzials des Hamburger Hafens für die Jahre 2015, 2020 und 2025“

Perspective

Rail and road infrastructure are limited

- Forecasted economic growth in the coming years has a significant impact on hinterland transport
- Ratio of rail transport is already today exceeding the level of the boom year 2008
- Rail and road infrastructure are not able cope with the economic growth in the long-term
- The river Elbe and connected inland waterways still have enough capacities



Only with the involvement of inland navigation a stable long-term use of all modes of transport is possible.

Inland navigation from and to Czech Republic

Mostly bulk cargo is transported by barge while project cargo becomes more important



Due to the strength of rail operators only few containers are transported to the Czech Republic by barge.

Advantages of inland navigation

Sufficient capacity and flexible services

- The Elbe has sufficient growth potential, yet only a fraction of capacity of the waterway is utilized
- Project cargo and over dimensional cargo are not an exception but common practise
- Barges are ideal for the transport of bulk cargo and other non containerized cargo
- Flexible adjustment of the required capacity due to use of expandable push barges is possible

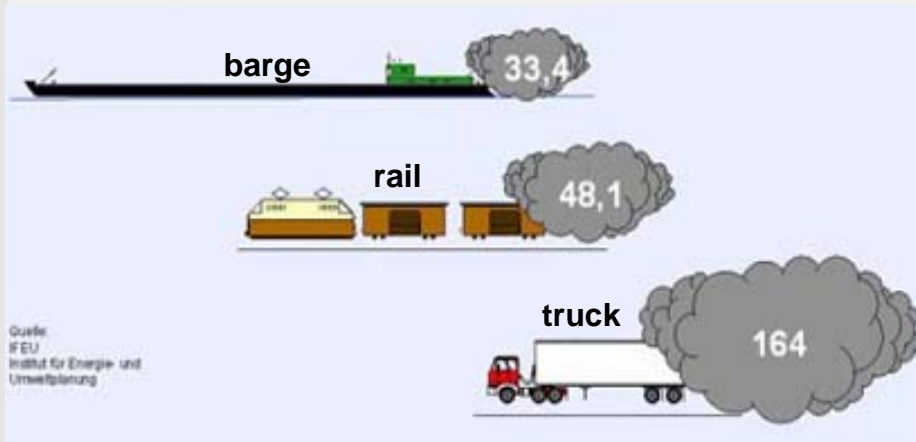


Only by combining the three modes of transport (waterway, rail and road) a useful and lasting connection to the Czech Republic is possible.

Advantages of external factors

Meeting the demands of “green logistics”

CO₂ emission of transport modes (measured in gram per tonkm)



- Barges have the lowest CO₂ emissions
- Barge have low sound emissions → almost no noise exposure for people
- Barges have very low rate of accident costs in freight transport

The barge is concerning to the increasing demands on the environmental impact of the logistics superior to other modes of transport.

Conclusion

The river Elbe is the essential complement for hinterland transport

- Rail and road infrastructure are not capable of handling economic growth in the long-term.
- River Elbe has almost 85 % capacity left and is predestined for the transport of heavy, project and over dimensional cargo.
- Barges have in comparison to other transport modes the lowest environmental and sound emission.
- Barges are very flexible and applicable for different types of cargo.
- Reliability and flexibility are the key success factors of inland navigation

After a decrease of volumes in the last years, inland navigation becomes again more and more attractive for transports between Hamburg and the Czech Republic.

Thank you for your attention

Prague, 27th September 09.2011

