

Impact of Atlantic port's development on international rail freight traffic

Terminal/Railway Undertakings Advisory Group



Introduction

Port connection's main challenges

- Have an overview of current traffic
- Anticipate further ports' traffic development
- Have a better knowledge of current difficulties
- Help overcoming development constraints
- Offer relevant rail paths to the ports connected
- Ensure high quality of service in the long run

Main aims of the study

- (1) Define the development areas for multimodal solution (maritime/rail)
- (2) Identify the actions to increase multimodal solution
- (3) Understand the possible coordination with the RFC deployment

Task 1: Analysis of maritime transport of the Atlantic ports

Task 2: Analysis of the rail and road flows of the Atlantic ports

Task 3:
Costs analysis for international goods transport

Task 4: Shipping companies and port authorities surveys

Task 5: Possible evolution of the regulation EU 913/2010

Task 6: Combined maritime/rail solution at short, medium and long term

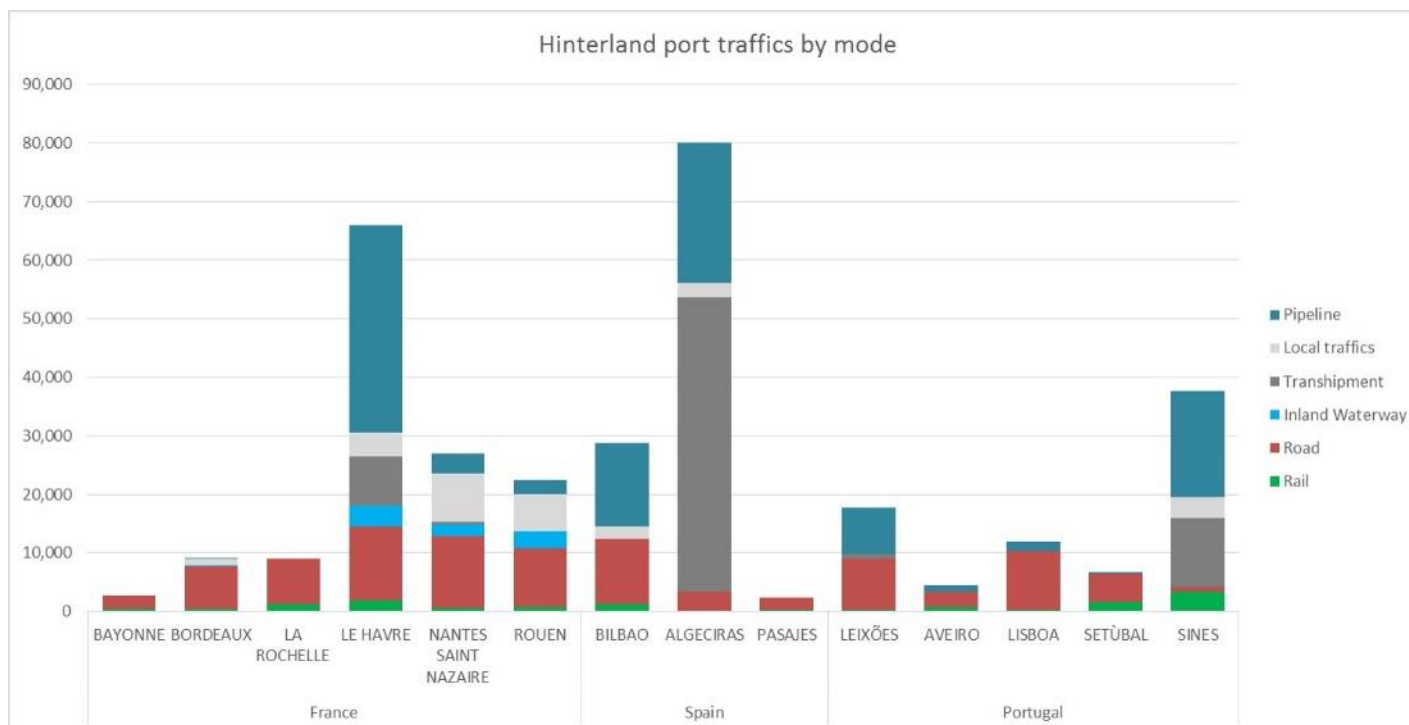
Maritime transport of the Atlantic ports

→ 337 MT handled by 14 ports

→ 118 MT to hinterland (Rail, Road, IWW)

→ 12% of rail market share

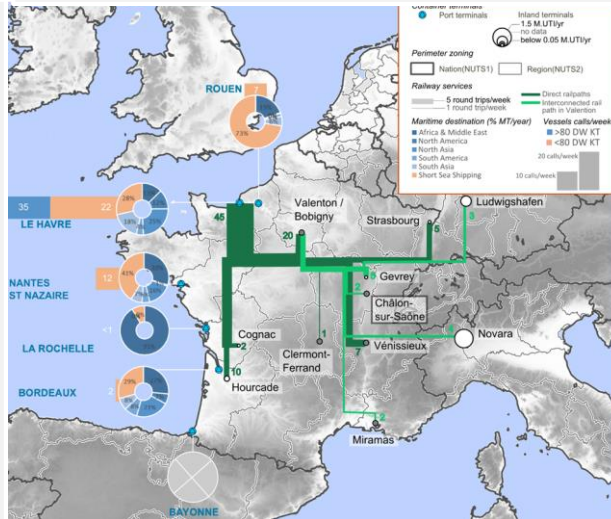
- Container rail markets where transshipment is not majority (Sines, Le Havre, Bilbao, Lisbon, Leixões...)
- Dry bulk rail markets for Cereals, Coal and Chemicals (Sines, La Rochelle, Rouen, Nantes-St-Nazaire...)
- Liquid bulk rail markets excluding pipeline to link refineries and inland depots (Le Havre, Rouen, Bordeaux, Bayonne)
- General cargo rail markets for automotive, steel products, wood etc. (Aveiro, Bilbao, Setúbal...)



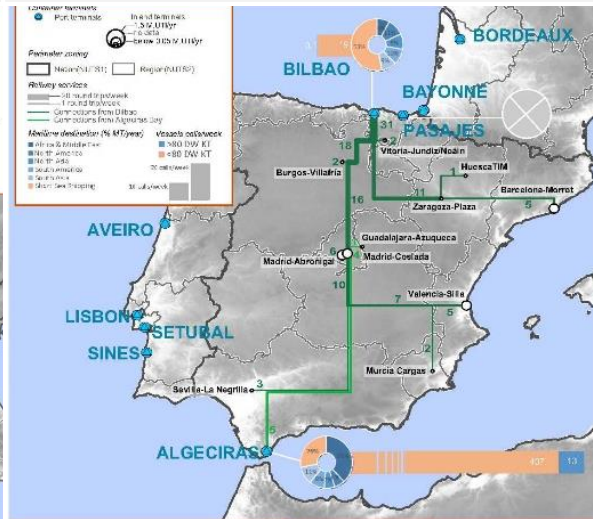
Intermodal rail flows of the Atlantic ports

INTERMODAL

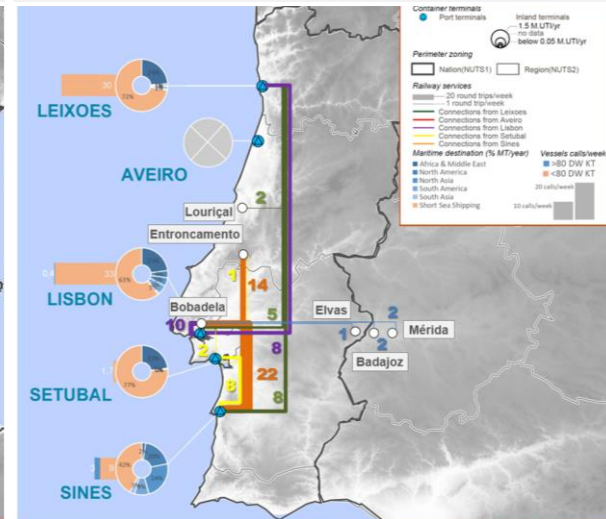
FRENCH ATLANTIC PORTS



SPANISH ATLANTIC PORTS



PORTUGUESE ATLANTIC PORTS



- More than 200 weekly intermodal services from/to the Atlantic ports in 2014
- 56% of intermodal tonnages over 400 km (2.9 MT)
- Only 1% of total port rail traffics concerns international destination

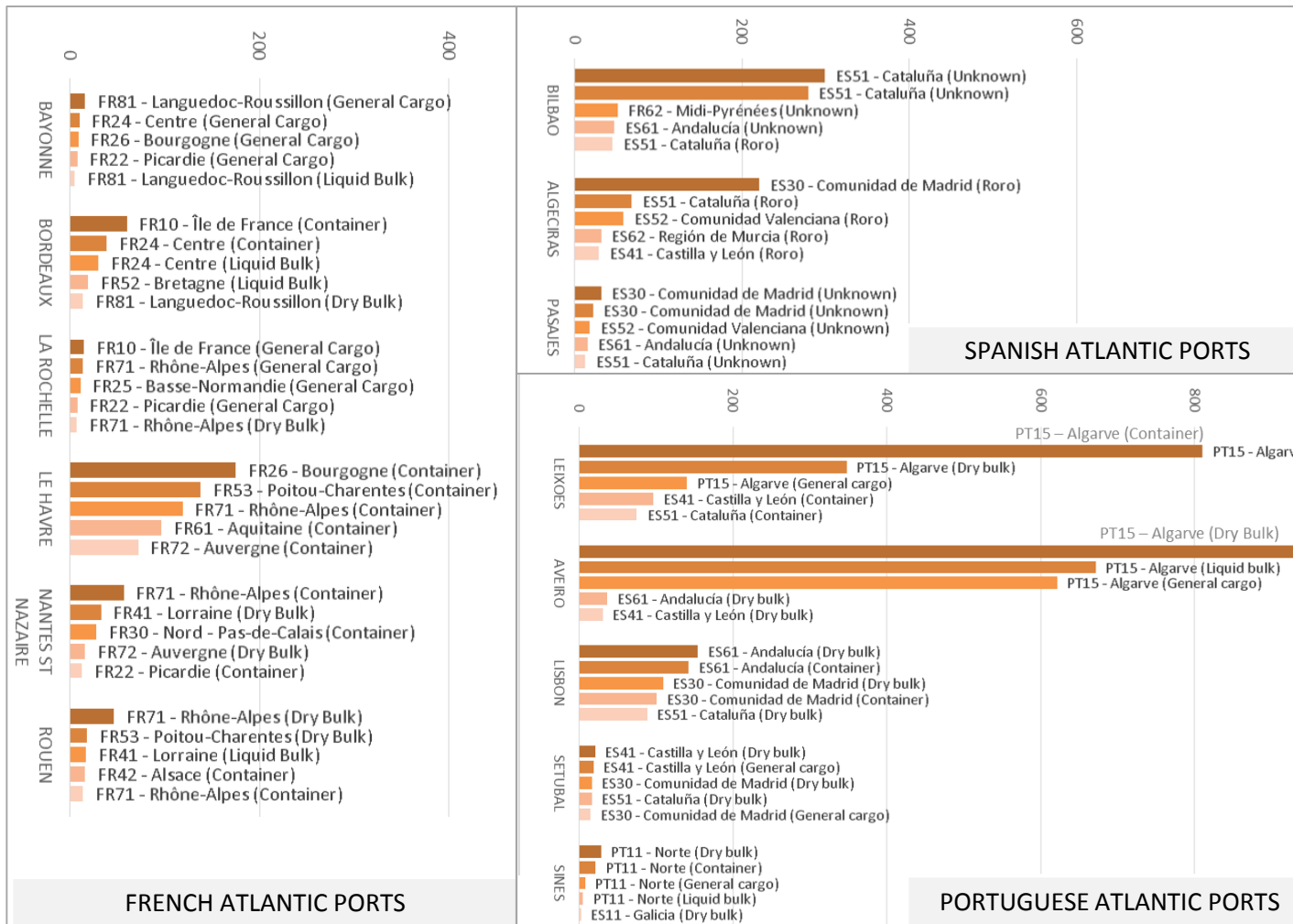
Conventional rail flows of the Atlantic ports

CONVENTIONAL



- Around 80 dry bulk services, 60 general cargo services and 140 liquid bulk services by week
- 36% of these tonnages over 400 km (2.9 MT)
- Less than 1% of conventional port rail traffics concerns international destination

Road flows of the Atlantic ports



- 10% of Atlantic port road tonnages over 400km (10.4 MT in 2014)
- 6% for international destinations (6.3 MT in 2014)
- Potential shift to rail on poorly served regions for intermodal traffics
- Other shifts to rail for adequate goods (cereals, steel products, chemicals, Ro-ro...)
- Minor modal shift potential on international destinations

Development constraints to rail services



	France						Spain			Portugal				
	LEH	ROE	NSN	LRO	BDX	BAY	PAS	BIL	ALG	LEIX	AVE	LIS	SET	SIN
INFRASTRUCTURES	Concerns about rail access sustainability		X		X	X		X	X			X		
	Inadequate or missing intermodal terminal	X		X			X			X		X		
	Inadequate rail paths offer or definition process				X					X		X		
	Insufficient technical characteristics of rail network			X	X	X			X					
	Lack of capacity in railway terminal (load/unload)													X
	Possibilities of longer maximum train length	X						X	X	X				
OPERATIONS	Concurrency of passenger and freight traffic			X	X			X				X		
	Concurrency with rail network maintenance		X		X	X								
	Inefficient management of the support marshalling yards		X				X	X						
	Lack of traffic regularity		X				X		X					
	Restriction for specific traffics (dangerous, gauge...)			X										
	Restrictive speed of rail path				X									
Restrictive infrastructure access timetables							X							
STRATEGY	Difficulty to know the hinterland flows	X	X											
	Industrial activity relocation		X											
	Unsuitable rail operator strategy	X			X		X			X				
	Unsuitable shipping companies strategy			X										

- A complete survey via interviews with Port Authorities, Railway undertakings, Shipping companies, Road associations and Logistic Operators
- Infrastructure topics concern linear port accesses and handling facilities
- Operational topics cover the concurrency with passenger and maintenance and the average level of service
- Strategy topics correspond to the divergences in stakeholders aims and positioning

Possible evolution of the regulation EU 913/2010

Unfair competition on the port rail market

- Directive 2012/34/EU Art. 10: “Railway undertakings shall be granted, under equitable (...) conditions, the right to access to the railway infrastructure (...) connecting maritime and inland ports (...)”
- Port of Antwerp can apply to RFC2 to address north France Market / Port of Le Havre cannot
- Similar examples for Sines/Algeciras to Madrid, Bilbao/Bordeaux to Navarra et.

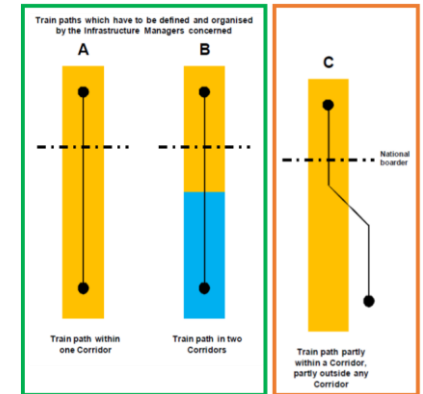
Regulation modification proposal

- Modify the mention of “international train-paths”, “cross-border” or “international freight train”
- Refer to “rail freight services of international origin destination of goods”

Extension of current eligible services to Atlantic RFC

- Would permit to address the port core maritime-rail market
- Would exclude multi-client trains including inland goods

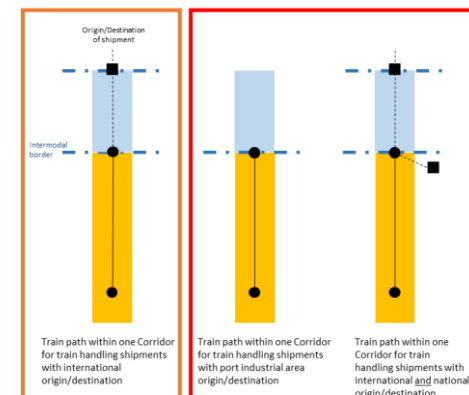
Cases of a physical border



Under the competence of one or various Rail Freight Corridor

Potentially under the competence of a RFC after a scope extension

Cases of an intermodal border



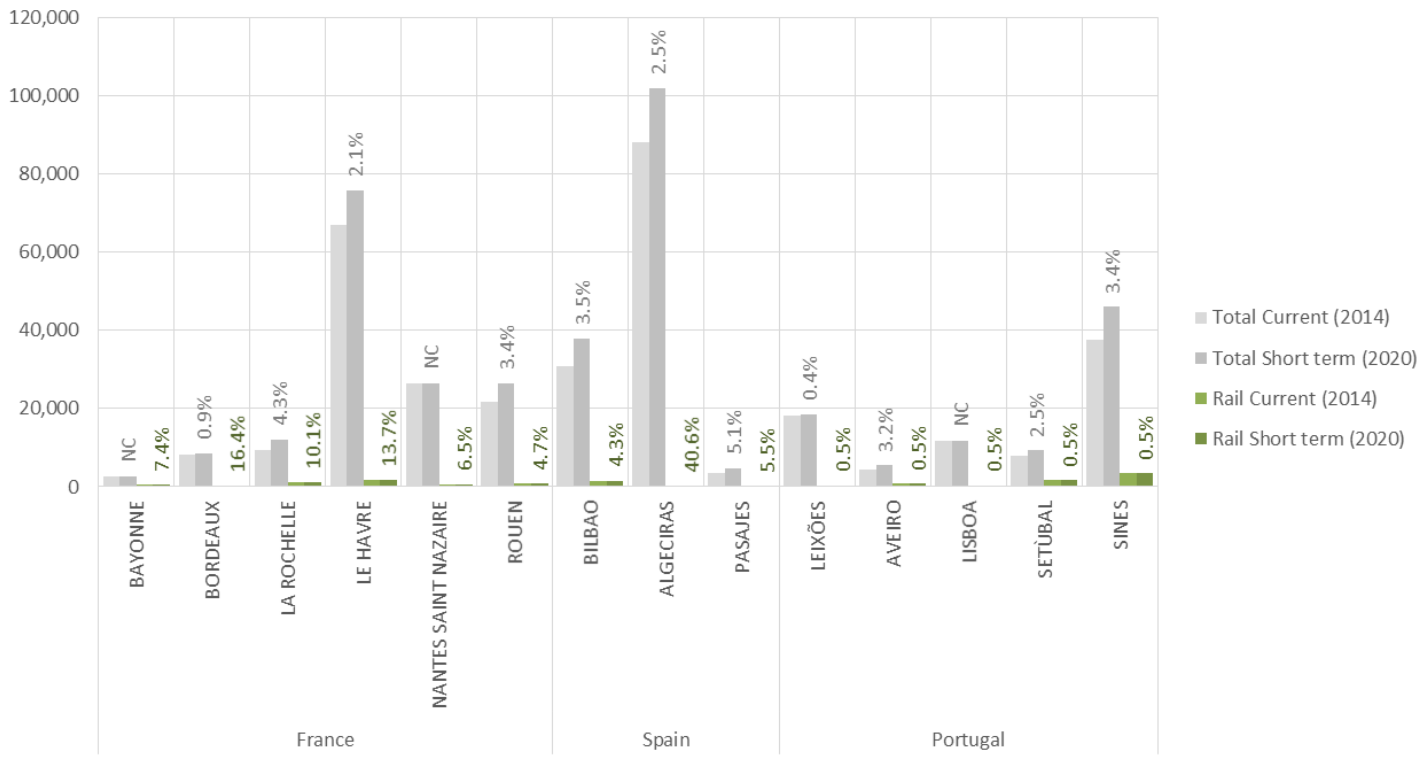
Potentially under the competence of a RFC after a Regulation modification

Out of the competence of RFC even after a Regulation modification

Combined maritime/rail solutions



Atlantic Ports' traffic forecast
(Compound annual growth rate forecasted for maritime and rail traffics)



- Port strategic forecast until 2020:
 - +2.3%/y for total maritime traffics
 - +6.4%/y for rail pre post haulages
- Recommendations for Atlantic Corridor:
 - Publish case studies to highlight the benefits of the RFC
 - Confirm the ability to provide stable path offer in the mid term
 - Propose common RAG/TAG meetings with other RFC
 - Assist Terminal Managers for EC funding requests
 - Present existing RNE tools and interface with PCS tools



THANK YOU FOR YOUR ATTENTION

Clément RUEL
SYSTRA
Agence Sud-Est
Immeuble Le Bonnel
20 rue de la Villette
69328 Lyon Cedex 03 - France
+33 (0)4 43 82 00 53
cruel@systra.com

