



Pan-European Container Transportation

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Grande Arche, PARIS LA DEFENSE
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European Shortsea Network



Seafreight - Global

- 3.5 million TEUs
- 900 locations/ > 100 countries
- worldwide office network of approximately 60 000 logistics experts
- Innovative and fully integrated IT solution services

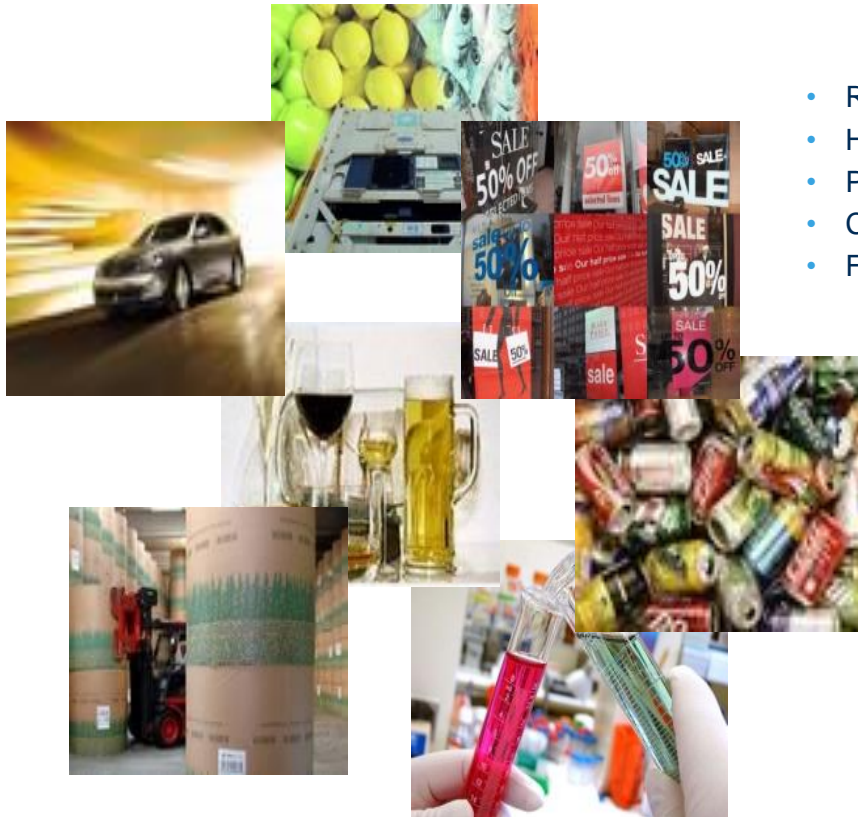
Today's Pan-European Coverage and Infrastructure

- 200 000 TEUs
- 340 locations > 44 countries
- worldwide office network of 25000 logistics experts



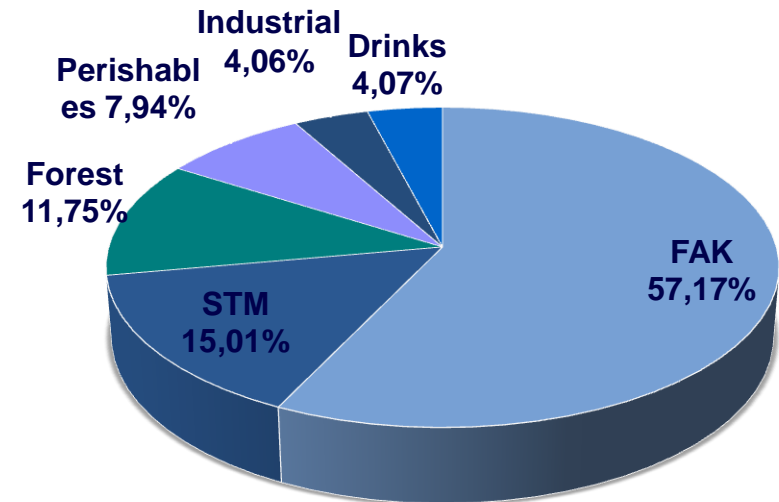


Solutions – Dedicated specialists per Industry



- Automotive
- Drinks Logistics
- Reefer/Perishables
- Forest Products

- Retail/Supermarkets
- Hotel Logistics
- Pharma
- Chemicals
- FMCG

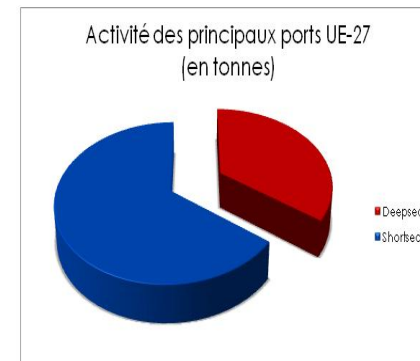




Why focus on shortsea?

Performance advantage on shortsea distances:

- globally more than 65% of the total volume (all modes) I/E are already shipped by shortsea and due to economics and demographic increase in volume is expected
- Shortsea in general suffered less than deepsea while recent crises whereas shortsea container traffic did better than overland.



Sustainable Solutions:

- Shift traffic from overloaded roads to sea
- Reduce pollution

Shortsea increases connectivity → Complete Transport offer

Door – to – Door Multimodal Services



- Flexible on short Distance
- Fast Deliveries



- Own Blocktrain System on certain lines
- Short-Term provision of Equipment



- Complementary to other Modes of Transportation
- Lowest CO2 emission

- ***Our Objective:*** *provide best inland solutions at lowest cost fitting customers needs*
- ***Our Support:*** *a complete inland expertise with proper tools*



Present Intermodal Solutions K+N in Europe

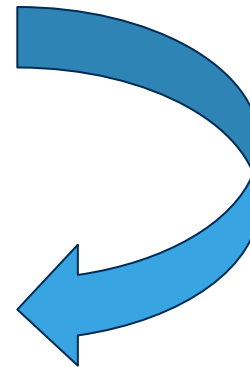
- Germany:**
- Chartered Fleet (> 150 Trucks, 50 GPS-controlled)
 - Rail-master Agreements
 - Barge-master Agreements
- Netherlands:**
- >50% Intermodal-volume are moved by barge
- U. K.:**
- Rail-master Agreements
- Austria:**
- Block trains 6 days/week Ham/Brv– Austria plus local train solutions (customer-related)
- Norway/Sweden:**
- Rail-Master-Agreement



Challenges

- ❑ Missing competition → reduced frequency
- ❑ Habit and Practice (external as well as internal)
- ❑ Availability of equipment (e.g. Inland depots)
- ❑ Competitiveness versus road service
 - - increased Frequency → Flexibility
 - - Reliability + Predictability
 - - Cost of services connected to pre-/postcarriage

Compensation of factor « Transit Time/ Speed »





Intermodal Fundamental Question

**Operating own Resources
Or
Market Resources – Sub-contractor**



**The combination of both is the solution to get maximum quality
And flexibility in a volatile market and to overcome peaks and lacks**



The added Value of combined Network of Intermodal services:

- Consistent Quality
- Increased profit opportunities
- Improved flexibility with import/export container deadlines
- Option of corrective actions
- Strategic development with suppliers



Kuehne + Nagel in France

Key Figures

Founded in 1968

1.300.000 m² sq.m of warehousing area

75 locations including 51 warehouses

> 9000 employees

Harbors:

Imports: LeHavre, Marseille/Fos

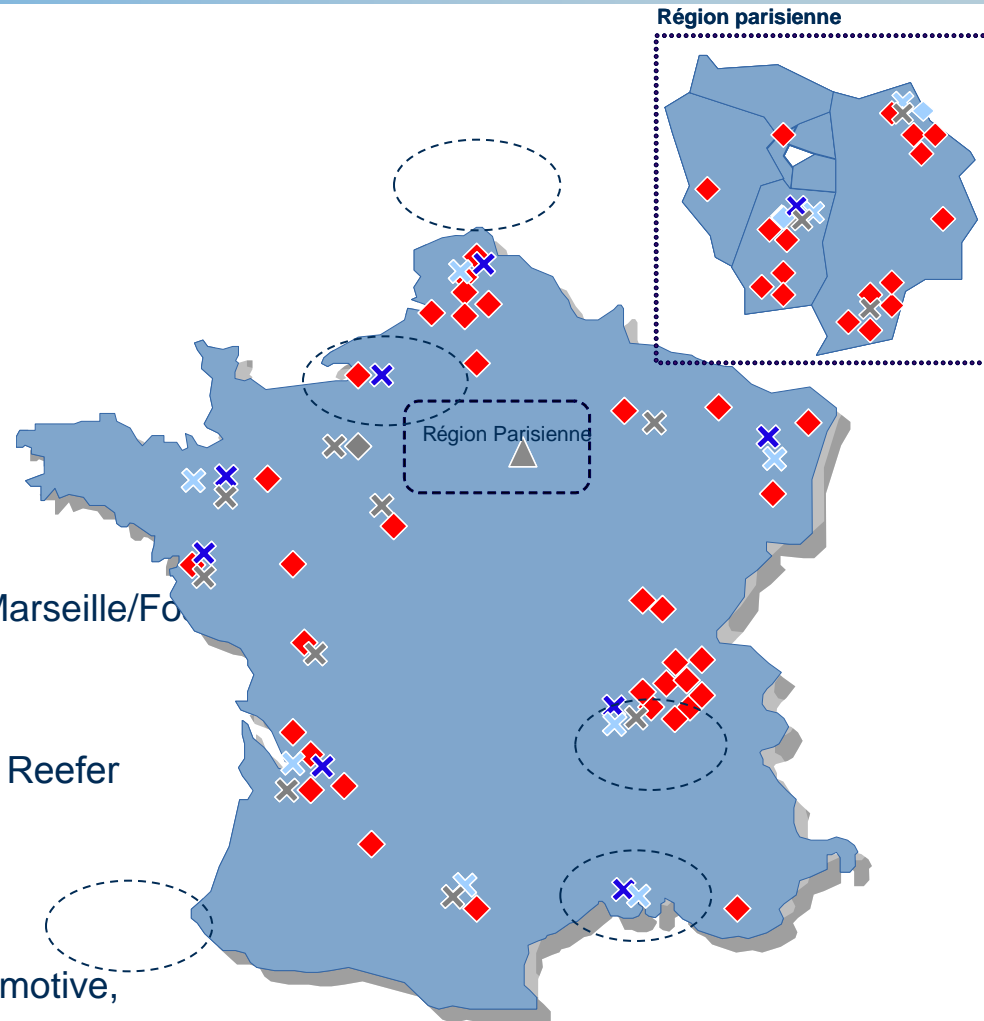
Exports Ctr Freight Station: Paris, LeHavre, Lyon, Marseille/Fos

Antwerp, (Bilbao)

Equipment: mainly 20' or 40', Standard/Highcube / Reefer

Pre-/Postcarriage: still mainly by truck

Main commodities: Beverage, Food additive, Automotive, Perishable, Forest, Oil&Gas



Increased demand by initially overland customers



Q&A
Thanks for your attention

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