MARKET PLACE SEMINAR, ISTANBUL 2009, 22 – 23 OCTOBER
Intermodal solutions between Europe and Turkey
Armin Riedl, Kombiverkehr KG
Established
1969 based in Frankfurt Main

Target group
Freight forwarders and transport companies exclusively

Range of services
High-quality terminal-terminal connections in European road-rail combined transport

Key statistics
- Over 870 national and international direct and shuttle trains per week
- On average more than 160 direct and shuttle trains per transport day
- Over 15,000 daily Gateway connections
- 1,021,703 truck consignments transported (2008)
- EUR 432 million sales revenues (2008)
- 167 employees (31 December 2008)
Transport volumes 1969 - 2008

* One consignment is equivalent to the capacity of a tractor-trailer or articulated truck.
RANGE OF SERVICES

European block train network

- Over 550 international direct train services per week
Turkey is an important trading partner for Europe – in particular for Germany.
Turkey has an advantageous position between Europe and Asia, giving it an important transit function.
Germany is one of Turkey’s most important trading partners. The balance of trade between Turkey and Germany is nearly equalized.

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**Main supplier countries of Turkey 2008**

- Germany: 9.3%
- Russia: 15.5%
- China: 7.8%
- Italy: 5.5%
- France: 4.5%
- USA: 5.9%
- Others: 51.5%

**Main customer countries of Turkey 2008**

- Germany: 9.8%
- Russia: 4.9%
- Spain: 3.1%
- France: 5.0%
- Italy: 5.9%
- UK: 6.2%
- Others: 65.1%

Source: Bundesagentur für Außenwirtschaft (Federal Office for Foreign Trade)
Compared to EU standard, Turkey’s railway infrastructure is not much developed.
- Only about 20% of the rail lines are electrified.
- Only about 24% of railway infrastructure are provided with signalling systems.

About 95% of national goods transports are done by road.

Turkey’s international goods transports are mainly done by sea.

The rail system has been neglected in the past.

Only a few big distribution centres and modern multimodal terminals with networking between rail, road and air freight

Using rail solutions between Western Europe and Turkey: numerous countries with different technical conditions (power supply, signalling systems, profiles)

Source: Bundesagentur für Außenwirtschaft (Federal Office for Foreign Trade)
MEASURES TO ENHANCE MARKET ACCEPTANCE

New sales structure with Europe Intermodal

- Attractive products in road-rail combined transport
- Networking and cooperation with operators and railway undertakings
- Financial support programmes (e.g. CREAM)
- Investments in infrastructure projects (Marmara Sea tunnel, Terminals, Trans-European Networks)

MARKET SUCCESS
RAIL FREIGHT SERVICES GERMANY – TURKEY v.v.
IN UNACCOMPANIED ROAD – RAIL COMBINED TRANSPORT

High potential and promising growth opportunities in a new market segment, due to

- long haulage distances
- short transport times
- balanced traffic flows
- high quality
RAIL FREIGHT SERVICES GERMANY – TURKEY V.V.

ROUTING VIA LJUBLJANA IN COOPERATION WITH ADRIA KOMBI

BOSPORUS-EUROPE-EXPRESS

- Munich – Ljubljana – Halkali (Istanbul) v.v.
- With connection to the national and international networks of Adria Kombi and Kombiverkehr
- With connection to the networks of partner companies as Hungaria Intermodal or Cargonet
- Shorter transit time compared to road transports
- Start: March 2008
RAIL FREIGHT SERVICES GERMANY – TURKEY V.V.

BOSPORUS-EUROPE-EXPRESS
Transport volumes in consignments March – Aug. 2009 / March – Aug. 2008: + 28 %

consignments

<table>
<thead>
<tr>
<th>Month</th>
<th>2008</th>
<th>2009</th>
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<tr>
<td>März</td>
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<td>150</td>
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<td>Jun</td>
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<td>200</td>
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<td>Aug</td>
<td>250</td>
<td>270</td>
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RAIL FREIGHT SERVICES GERMANY – TURKEY V.V.

ROUTING VIA TRIESTE

- Mannheim – Trieste v.v.
  - Forwarding from Trieste by sea
  - Start: October 2008
  - Service temporarily stopped in August 2009 because of operational problems
  - New start of service is planned in November
RAIL FREIGHT SERVICES GERMANY – TURKEY V.V.

MANNHEIM – TRIESTE v.v.

Consignments

<table>
<thead>
<tr>
<th>Okt 08</th>
<th>Nov 08</th>
<th>Dez 08</th>
<th>Jan 09</th>
<th>Feb 09</th>
<th>Mrz 09</th>
<th>Apr 09</th>
<th>Mai 09</th>
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- Okt 08: 100
- Nov 08: 200
- Dez 08: 500
- Jan 09: 300
- Feb 09: 400
- Mrz 09: 500
- Apr 09: 600
- Mai 09: 700
- Jun 09: 600
- Jul 09: 500
Company Profile

- Founded in October 2007
- Based in Istanbul
- Shareholders: Kombiverkehr (50%) and Adria Kombi (50%)
- Main business: intermodal transport services in the corridor between Turkey and EU states
- Target group: freight forwarders and carriers
- Outlook
  - Expansion of rail network connections in the Asian part of Turkey
  - Rail connections Middle East
Integrated European Project on the corridor Netherlands/Belgium – Turkey/Greece
CREAM (Customer-driven Rail-freight services on a European mega-corridor based on Advanced business and operating Models”)

- 30 project partners from 14 countries (railway undertakings, operators in combined transport, research institutions, technology providers)

- Project term: 1 January 2007 - 31 December 2009

- Main target is to improve rail freight services and gain competitiveness on the corridor between Western Europe and Turkey/Greece:
  - Shorten of transport time
  - Growth on rail freight transport volume
  - Creation of coherent Quality Management Systems to get equal conditions of transport and similar production quality on the whole corridor
  - Utilization of harmonized IT and Telematic systems
  - Knowledge transfer
THANK YOU VERY MUCH FOR YOUR ATTENTION!