New Business Designs for Inland Terminals
October 27th-28th 2011 Hamburg
Agenda

- Naviland Cargo and combined transport within SNCF Geodis
- Inland Terminals: A key asset of the value chain
- Inland Terminals: New business model for and enhanced role
- Q&A
Combined operations coverage: Maritime / continental & door to door

**Continental combined transport**

Terminal to Terminal combined rail-road transport of continental containers operated by NOVATRANS

**Maritime combined transport**

Door to Door combined rail-road transport of sea containers operated by NAVILAND Cargo
Naviland at a glance

**French leader in maritime combined rail road operations**

- Shipping lines, NVO’s, forwarders & tank operators
- Door to Door combining rail and road
- Road hauliers, forwarders & logistics companies only

- Markets = General cargo, Chemicals, Bulk products, temperature controlled products
- Turnover 2010 = 100 € Million
- 1.300 trains per month
- 20 locomotives / 50 conductors / 1600 wagons fleet (operated under SNCF License)
- 14 inland terminals (securing handling, storage, maintenance and reporting)
- 700.000 ITU’s/year
- Last miles operator in ports and inland terminals
- 320 people
A strong French based network connected to Europe
Inland Terminals: A key asset of the value chain

30 Inland Terminals in France

- Located next to major ports (Le Havre, Marseille, Fos)
- Integration of supply chain added value services
- Serving changing industry needs
- Secure leadership role for port authority to influence the transport side of the supply chain
- Increase cargo throughput throughout
Inland Terminals: New business model for and enhanced role

The new equation

- Over water transport now a commodity
- Shipping networks and terminals better integrated
- Only place for major cost savings and compression of the supply chain is over land

Inland terminals are a cornerstone to this strategy
Key Components of the Inland Terminals offer

- Intermodal terminal (road, rail, barge, air)

- Port and port terminal connection through rail, barge, road through high capacity corridor

- Logistics support services and activities in vicinity of terminals through clustering, logistics zones, distribution centers and container depots

- Very large land footprints required – to accommodate rail up to 10 tracks, 850 meters long
Inland Terminals Business drivers

- Profit
- Compress supply chain (time and cost)
- Lack of land or inexpensive land at port
- Lack of capacity for growth at port – (need to increase velocity and throughput on same port footprint)
- Community congestion and pollution relief
- Deeper penetration into hinterland

It’s all about reach, time, reliability and price !!
Inland Terminals main functions

- Satellite terminal for sea ports
- Increase traffic, capacity and value added services off port on cheaper land banks
- Enable functions no longer economically feasible at port eg, container consolidation and depots
- Transloading area – domestic distribution
- Distribution hub for enhanced hinterland networks
...and business models

- **Intermodal operator**
- **Real estate developer promoter** – requires large footprints: 100 to 400 hectares
- Each player focuses on their niche:
  - Rail
  - Warehousing: Smart buildings, cool logistics, distribution space, value added services
- Operational advantages for:
  - Drayage
  - Dedicated private roads
  - Better integrate information systems for terminal operators and throughout supply chain
Intermodalism is key to:
- Reduce handling costs
- Manage inventories
- Diversify gateways
- Match transport links to fixed points of non transport supply chain activities

Inland terminals are key to intermodalism