French-Iberian Rail Link
Fostering European Connectivity
Barcelona, 2nd and 3rd November 2010
Grup TCB

- International operator of container and multipurpose terminals
- Rail logistic operators
- Engineering & IT services
- Spain, Brazil, Cuba, Mexico, Turkey, Colombia and India
- 13 maritime terminals
- 3 railway terminals
- Throughput 2009: approx. 2.7 million TEUs (Est. 3.1 mill in 2010)
- Turnover 2009: € 290 million
- All major shipping lines as client
Intermodal strategy

- Extension of service portfolio to our clients.
- Facilitate shipping lines, marketing & sales of their product to their final clients
- Promotion of rail services to inland points
- Expansion of our *hinterland* (including Europe)
- Competitive versus neighbouring ports
- European gauge (UIC) connection towards points inside Europe
- Active member of FERRMED from the beginning
Intermodal Services

- Barcelona: TCB Railway Transport
- Valencia: TCV Railway Transport
- TCB: Rail Terminal Muelle Sur
- TCV: Rail Terminal Muelle de Levante
- TCG: Rail Terminal Muelle de la Osa
- Zaragoza: tmZ Inland Rail Terminal
- Multimodal door to door services
- Dedicated Shuttle Trains
- Inland Rail Terminal Operation
Present situation
Future 2013 (Artist impression)
Barcelona railway terminal

- TCB Muelle Sur:
  - Railway Area: Today
    - 4 ha
    - 1 RMG
    - 4 tracks of 450 m each
  - Railway Area: 31/12/2010
    - 4 ha
    - 1 RMG
    - 5 tracks of 450 m each
    - ONE new track with mixed gauge, UIC and Iberian
  - Railway Area: Expanded (2013)
    - 5 ha
    - 3 RMG
    - 6 tracks of 750 m each
    - ALL tracks with mixed gauge, UIC and Iberian
Rail Terminal Operations
TCB Railway

- **Intermodal Services:**

- **Rail:**
  The main TCB Railway’s activity is container transport by rail

- **Dedicated trains:**
  TCB Railway operates a train from a single client

- **Multi-client trains:**
  TCB Railway operates a train used by several clients

- **Multi-client RENFE network:**
  TCB Railway uses RENFE’s network for destinations not covered by own trains

- **Truck:** Container loading and unloading by truck, rail road
TCB Railway Services

RAILWAY SERVICE

Barcelona - Zaragoza:
- 10 trains per week
Zaragoza - Barcelona:
- 10 trains per week
Barcelona - Azuqueca:
- 5 trains per week
Azuqueca - Barcelona:
- 5 trains per week
Barcelona – LLeida:
- 2 trains per week
LLeida – Barcelona:
- 2 trains per week
Barcelona – Burgos:
- 3 trains per week
Burgos – Barcelona:
- 3 trains per week
Barcelona – Vitoria:
- 4 trains per week
Vitoria – Barcelona:
- 4 trains per week
Rail Coverage
Rail Traffic – Port of Barcelona

From January 2010 to August 2010

Rail traffic TEUS

Estimated volume 2010: 73,000 Teus
Cuota Anual ferroviaria TCB/TCB Railway

Año

2007 2008 2009 2010 YTD
Rail Traffic – Port of Barcelona

Cuota Mensual ferroviaria TCB/TCB Railway 2010 YTD

Meses: 1, 2, 3, 4, 5, 6, 7, 8, 9
Porcentajes: 0%, 2%, 4%, 6%, 8%, 10%, 12%, 14%
Present Situation

• **BOTTLENECKS:**
  - Container Terminals
  - Connection between Container Terminals and rail shunting yards
  - Length of Trains
  - Inland Terminals capacity

Results in:
The railway volume in Container Terminals is increasing, but the infrastructure is insufficient. This means that growth possibilities are limited.
Present Situation

• **INVESTMENTS:**
  - Container & Inland Terminals with new tracks and equipment
  - Entry and exit from Container Terminals, better connections within the ports
  - Longer composition of trains (currently 450 m)

Result:
In order to provide good service levels and increase market share, it would be necessary to invest in above points
Present Situation

• ENVIRONMENTAL IMPLICATION:
  o Decrease number of trucks in road
  o Decrease number of trucks in Container Terminals
  o Safer transport

Results in:
In Spain, each train carries 60 containers (roundtrip). That means an improvement for environment and road safety because using train transport suppose 60 least transports in trucks (for long distance)
Present Situation

- NEW RAIL OPERATORS AND STATE RAIL OPERATORS:
  - Competition in railway sector in all areas
  - Opportunities for new markets

Results in:
The arrival of private sector into railway transport has lead to a “commercial war” between new private operators and the public operator (RENFE)
Present Situation

- COMPETITION:
  - Price: Improve auxiliary costs of trains and services
  - Service:
    - Improve operational performance
    - Punctuality
    - More resources
    - Better Customer Service

Results in:
Increase of the railway market share
GRUP TCB

Spain’s leading international terminal operator!

www.gruptcb.com
Thank you!!