Waterwegen en Zeekanaal NV
weg van water

Intermodal Links to the Danube Estuary (ILDE)

Conference

29.04.2015

Waterwegen en Zeekanaal NV
weg van water

Waterwegen en Zeekanaal NV (W&Z)

Ir. Leo Clinckers
Managing Director (CEO)
Waterwegen & Zeekanaal NV

Waterwegen en Zeekanaal NV
weg van water

Waterwegen en Zeekanaal NV
ILDE conference 29.04.2015

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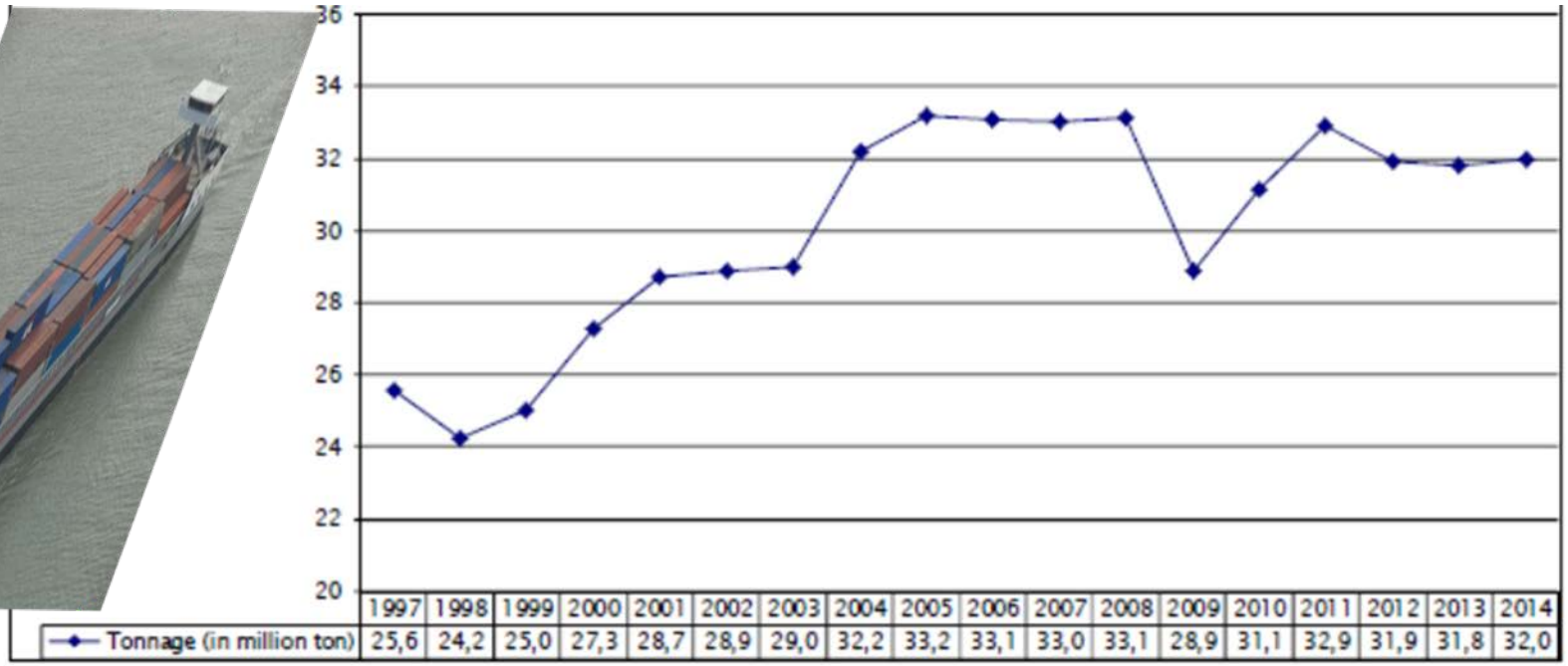
Total Amount of cargo transport (tonnage) in Flanders on the inland waterways in management of Waterwegen en Zeekanaal, 1997-2014



	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Tonnage (in million ton)	25,6	24,2	25,0	27,3	28,7	28,9	29,0	32,2	33,2	33,1	33,0	33,1	28,9	31,1	32,9	31,9	31,8	32,0

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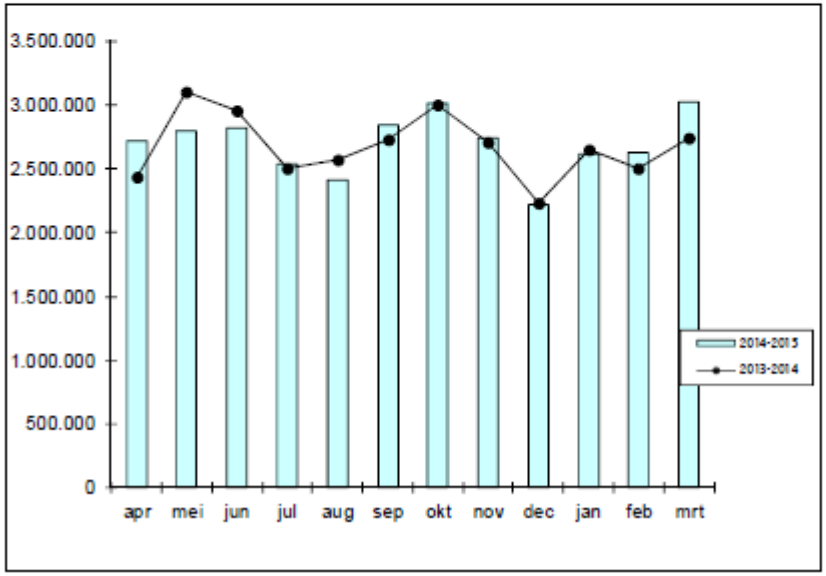
	2013-2014	2014-2015	eff. groei	% groei
apr	2.435.824	2.712.698	+276.874	+11,37%
mei	3.094.883	2.799.839	-295.044	-9,53%
jun	2.953.862	2.814.826	-139.036	-4,71%
jul	2.505.362	2.537.862	+32.500	+1,30%
aug	2.567.133	2.412.196	-154.937	-6,04%
sep	2.729.027	2.840.691	+111.664	+4,09%
okt	2.995.577	3.011.489	+15.912	+0,53%
nov	2.703.958	2.738.624	+34.666	+1,28%
dec	2.226.348	2.217.799	-8.549	-0,38%
jan	2.648.814	2.611.418	-37.396	-1,41%
feb	2.498.555	2.629.031	+130.476	+5,22%
mrt	2.738.224	3.021.747	+283.523	+10,35%
TOTAAL	32.097.567	32.348.220	+250.653	+0,78%



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ILDE CONFERENCE PROGRAM (sequel)

10.00 - 10.05	**Welcome Waterwegen en Zeekanaal NV-Ir. L. Clinckers, Chief Executive Officer**
10.05 - 10.10	Welcome Port of Baja-Mr. László Nagy, manager of Baja Public Port Ltd
10.10 - 10.40	Results of the study on the market potential - Mr. Karel Vanroye, Director, Buck Consultants International
10.40 – 10.50	Questions and assessing the needs of the stakeholders: transit times, frequency of services, price level, etc. – Mr. Karel Vanroye
10.50 – 10.55	Presentation of the Hungarian Federation of Inland Ports-Capt. Béla Szalma, President
10.55 – 11.10	Presentation Wienerberger – Mr. Luc Felix, Logistics Manager (construction materials)
11.10 - 11.25	Presentation Van Moer Group – Mr. Joost Van Lierde, Senior Commercial Manager (logistics service provider)
11.25 – 11.40	Presentation Arcelor Mittal – Mr. David De Rocker, External Transport Manager (steel industry)
11.40 – 11.55	Presentation Fast Lines – Mrs. Catrien Scheers, Ambassador of Fast Lines (transport group)
11.55 - 13.30	Lunch

Mr. László Nagy, Manager, Baja Public Port Ltd

Mr. Karel Vanroye, Director, Buck Consultants International

WATERWEGEN EN ZEEKANAAL NV

Buck Consultants International

ILDE – Connecting Inland Shipping Networks

Presentation of the results

(Intermodal Links with the Danube Estuary)

Karel Vanroye
Director

19 February 2015

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Contents

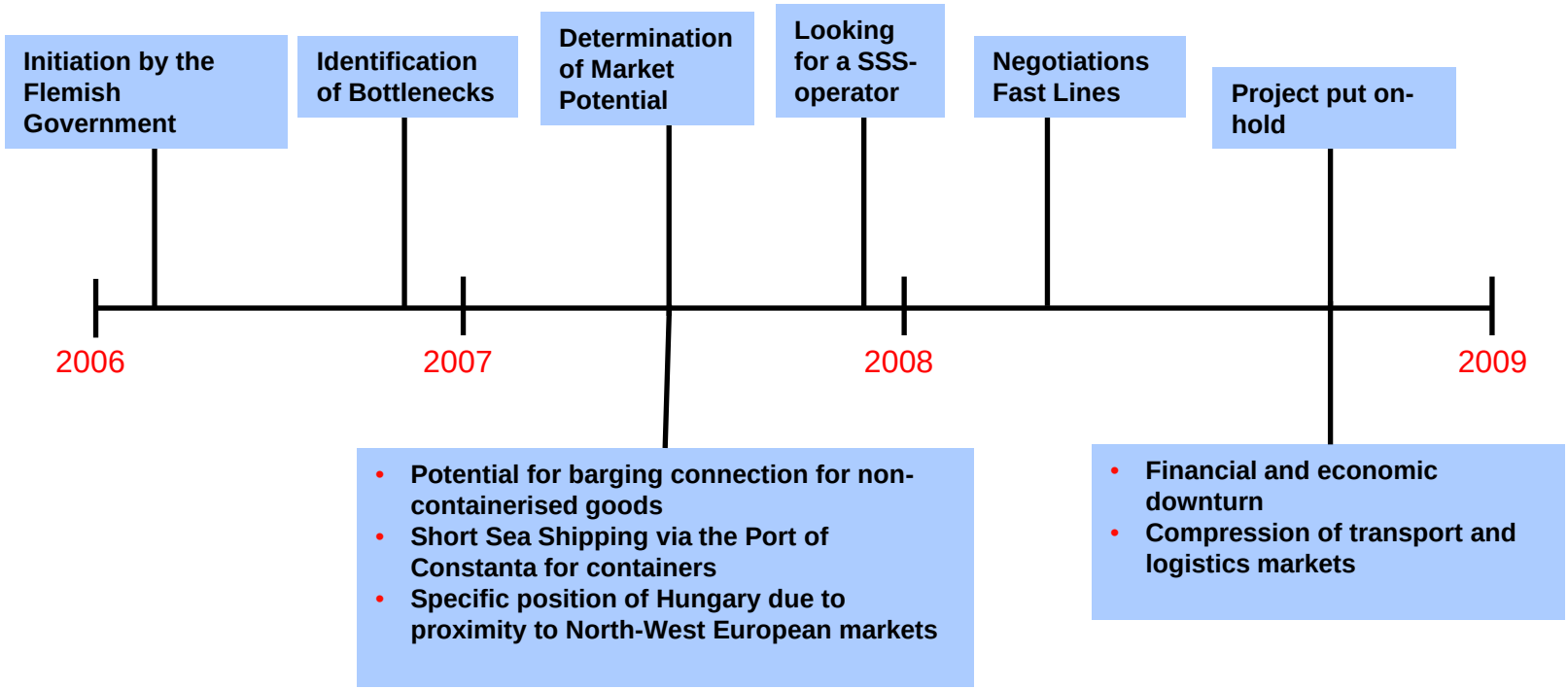
Buck Consultants International

1 Background of the meeting

Buck Consultants International

Starting point: ILDE (2006-2009)

Aim: the development and enhancement of inland navigation between the Region of Flanders and Romania, Bulgaria, Serbia and Hungary in view of the growing importance of East-West trade in the EU



ILDE Partners

Buck Consultants International

Lead partner:

WATERWEGEN EN ZEEKANAAL NV

nv De Scheepvaart

ROMANIA Galati APDM PORTS ADMINISTRATION on the MARITIME DANUBE GALATI

jugoagent a.d.

GHENT THE FRIENDLY PORT

constantza port

Baja Public Port

PORT OF BELGRADE

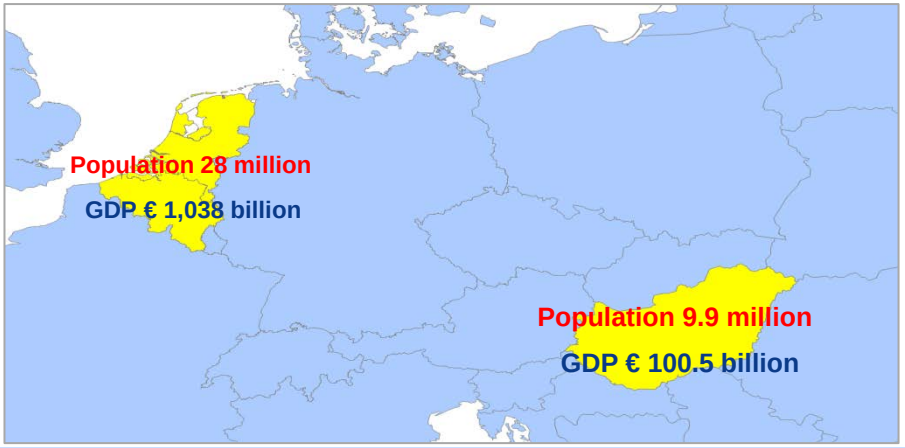
AGRO-MAAS

Danube River of Cooperation

BULMARKET

More info: www.ildeproject.eu

- Private stakeholders requested the lead partner to re-activate ILDE and to provide an update regarding the market potential
- It was decided that two different market approaches would be launched – the first one would deal with Hungary while the second one would involve (especially) Romania
- The aim of today's meeting is to briefly present the initial results of the market analysis and to "sound out" if there is any interest in a follow-up



BCI's Mission

- What is the market potential of inland shipping on the shipping lane between Belgium/Netherlands and Hungary?
- Is there scope for the development of a positive business case?

2 Inland shipping from an EU perspective

Buck Consultants International

Country/%/Year	1996	2006	2007	2008	2009	2010	2011	2012	2012/1996
EU 28 countries	*n.a.*	**5.7**	**5.8**	**5.9**	**5.9**	**6.7**	**6.1**	**6.9**	n.a.
EU 15 countries	7.6	6.7	6.8	6.9	6.7	7.5	7.2	7.9	+4%
The Netherlands	32.8	32.1	35.1	34.7	31.3	35.9	36.7	38.7	+18%
Romania	*7.9*	*10*	9.8	10.8	20.6	27.2	21.7	22.5	+185%
Belgium	10.4	14.7	14.9	15.6	14.3	17.6	18.5	*24.3*	+123%
Bulgaria	*n.a.*	*3.9*	4.8	12.6	20.7	21.2	15	16.4	n.a.
Germany	16.7	12.8	12.4	12.3	12.1	12.9	11.2	12.3	-26%
Hungary	*6*	4.5	4.6	4.7	4.1	5.3	4	4.4	-27%
Austria	4.9	3	4.2	4	4.1	4.7	4,2	4.6	-6%
France	2.6	3.4	3.4	3.5	4.1	4.3	3.9	4.2	+62%

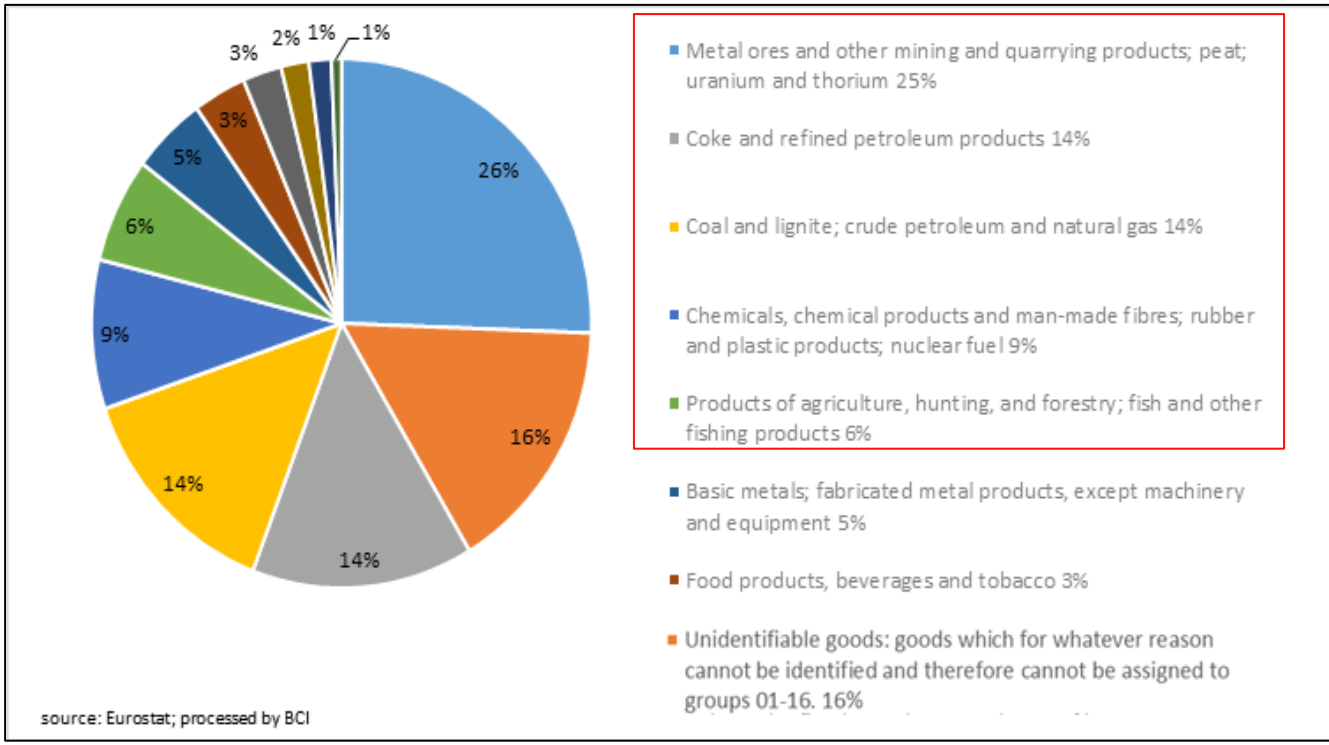
- The share of inland shipping at the EU level has increased due to the fact that it has sustained the economic and financial crisis better than the other two land modes

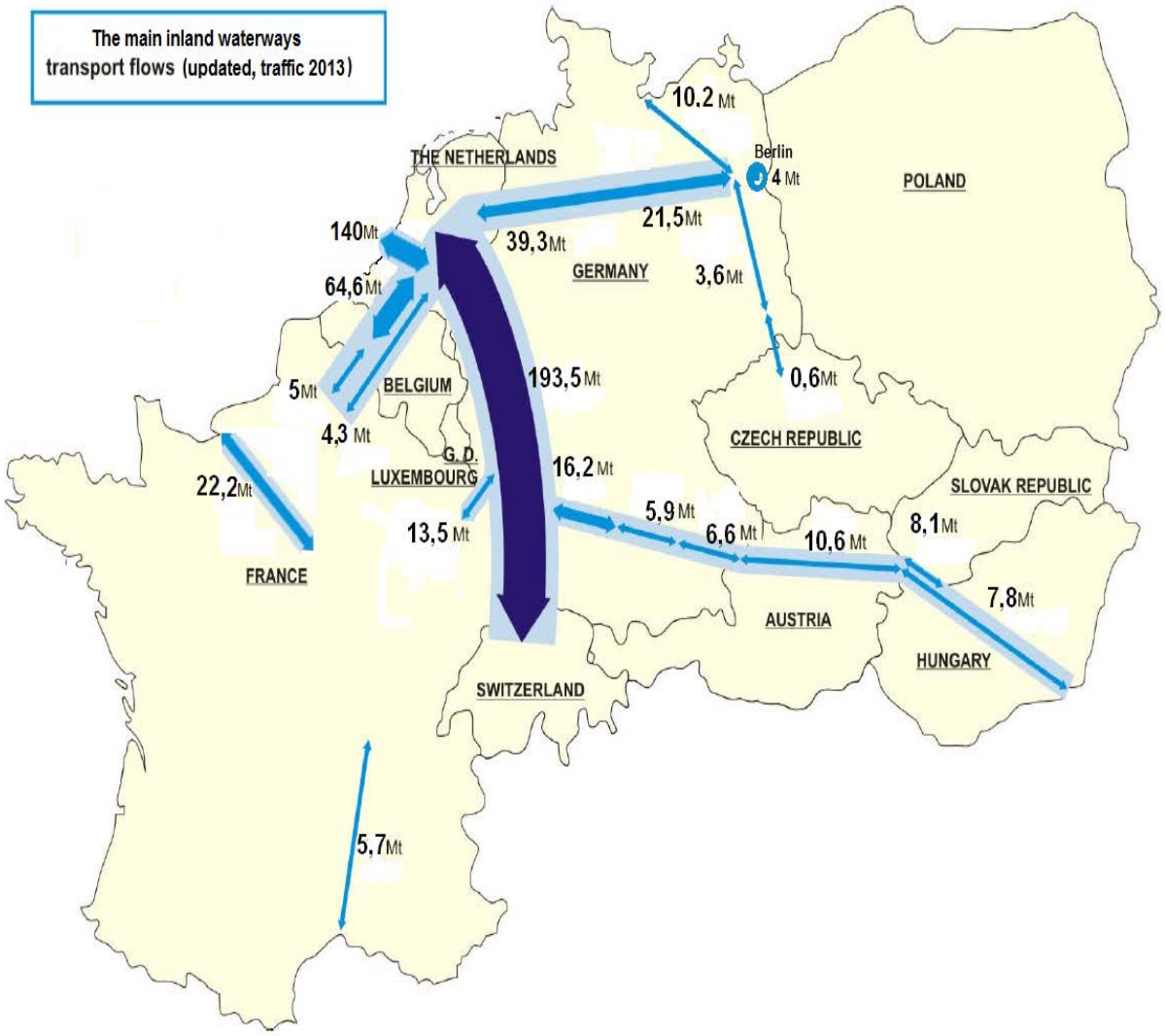
- There are no waterways in 10 Member States, and only 13 countries reported a sizeable activity. This explains the relatively "low" modal share

Country/Year In '000 tonnes	1996	2006	2008	2010	2012	2013
EU 28 countries	n.a.	n.a.	509 901	525 062	526 402	527 654
EU 15 countries	n.a.	n.a.	470 051	494 195	498 637	500 783
The Netherlands	289 332	317 853	344 797	346 901	350 069	356 062
Germany	227 019	243 495	245 674	229 607	223 170	226 864
Belgium	106 764	165 855	130 350	161 594	190 288	187 404
France	60 924	71 448	72 753	72 632	68 568	68 721
Romania	14 142	29 305	30 295	32 088	27 946	26 858
Bulgaria	999	5 950	10 956	18 372	16 378	16 726
Austria	9 303	9 183	11 209	11 052	10 714	10 624
Luxemburg	9 704	11 395	10 984	10 467	8 506	8 987
Slovakia	1 413	2 252	8 371	10 103	8 242	8 107
Hungary	2 172	7 327	8 829	9 952	8 135	7 857
Croatia	1 156	1 509	6 416	6 928	5 934	5 823
Poland	9 000	6 609	6 101	2 820	2 574	3 185
Czech Republic	3 178	1 124	752	833	838	608

- Inland shipping mainly involves the transportation of liquid and dry bulk
- The five most important product groups account for almost 70% of the total tonnage
- Inland barges carry a large variety of cargoes: bulk (dry or liquid) goods, hazardous products, general cargo, etc.
- Inland shipping is also becoming increasingly involved in new business such as containers, palletised cargo, fresh products, etc.
- Main impediment: the price of pre and post-transport

Products transported by inland shipping, EU 28 (2013)





- The main inland shipping corridors are:
  - The Rhine (332 Mt in 2013 including traffic in the Netherlands)
  - The Scheldt-Rhine connection (69 Mt)
  - The Danube (52 Mt in 2012).
- Good practices:
  - Almost 40% of manufactured goods shipped at Benelux container ports use inland shipping
  - Two-thirds of all containers exchanged between Antwerp-Rotterdam and Germany are carried by IWT

3 Analysis of the trade between Belgium-Netherlands and Hungary

Buck Consultants International

Trade between Belgium and Hungary

	2013		2013	
	Export (tonnes)	Import (tonnes)	Export (%)	Import (%)
Agricultural	45,687	46,265	11%	17%
Food	32,264	56,717	8%	21%
Textile	7,027	4,531	2%	2%
Wood, paper, printing industry	6,801	19,115	2%	7%
Chemicals	221,477	54,710	56%	20%
Building and building materials	8,040	6,886	2%	3%
Steel, iron, non-ferro and processed	42,534	35,608	11%	13%
Machinery, automotive; Industrial electronics	11,674	24,342	3%	9%
Consumer electronics	7,153	10,629	2%	4%
Other	3,199	645	1%	0%
Public utilities and waste	12,256	12,882	3%	5%
Total	398,112	272,330	100%	100%

Source: Comtrade; Processed by BCI

- Exports are concentrated into three main product groups: agriculture, chemicals and steel, which together cover some 80% of exports
- Imports are less concentrated. Four main groups exist: agriculture, food, chemicals and steel, which together cover some 70% of imports
- All trade groups have an imbalance between exports and imports
- Chemicals is the most important group with some 40% of total trade volumes

Trade between the Netherlands and Hungary

	2013		2013	
	Export (tonnes)	Import (tonnes)	Export (%)	Import (%)
Agricultural	137,311	146,768	18%	14%
Food	72,833	515,010	9%	48%
Textile	10,525	7,570	1%	1%
Wood, paper, printing industry	22,843	10,829	3%	1%
Chemicals	167,089	55,500	22%	5%
Building and building materials	6,256	339	1%	0%
Steel, iron, non-ferro and processed	142,956	27,624	19%	3%
Machinery, automotive; Industrial electronics	78,820	201,755	10%	19%
Consumer electronics	30,068	17,409	4%	2%
Other	2,502	65	0%	0%
Public utilities and waste	101,434	79,533	13%	7%
Total	772,637	1,062 402	100%	100%

Source: Comtrade; Processed by BCI

- The trade volumes are three times higher than those with Belgium
- Exports are concentrated into four main product groups: agriculture, chemicals, steel and waste, which together cover some 70% of exports
- Imports are much more concentrated into three groups: agriculture, food and machinery, which together cover more than 80% of imports
- All trade groups have an imbalance, which is substantial for food.
- Food is the most important group, accounting for some 15% of total trade volumes

Aggregated trade between Belgium-Netherlands and Hungary

	2013		2013	
	Export (tonnes)	Import (tonnes)	Export (%)	Import (%)
Agricultural	182,998	193,033	16%	14%
Food	105,097	571,727	9%	43%
Textile	17,552	12,101	1%	1%
Wood, paper, printing industry	29,644	29,944	3%	2%
Chemicals	388,566	110,210	33%	8%
Building and building materials	14,296	7,225	1%	1%
Steel, iron, non-ferro and processed	185,490	63,232	16%	5%
Machinery, automotive; Industrial electronics	90,494	226,097	8%	17%
Consumer electronics	37,221	28,038	3%	2%
Other	5,701	710	0%	0%
Public utilities and waste	113,690	92,415	10%	7%
Total	1,170,749	1,334,732	100%	100%

Source: Comtrade; Processed by BCI

- Chemicals is the most important export group. It accounts for one-third of all of the export volumes
- On the import side food accounts for more than 40% of the trade volumes
- Volumes are practically balanced

4 Potential for Inland Shipping

Buck Consultants International

- To calculate the real inland shipping potential we firstly took the modal split per country into account:

Modal Split 2012 (%)

	Belgium	The Netherlands	Hungary
Road	70.6%	47.5%	63.6%
Rail	12.3%	6.0%	30.0%
Inland Waterways	17.1%	46.5%	6.4%

Source: Eurostat

- Secondly, we only looked at the potential for international inland shipping:

Share of national and international transport in total inland shipping (2012)

	Belgium	The Netherlands	Hungary
National	44%	31%	0%
International	56%	69%	100%

Source: Eurostat

- Thirdly, we did not take into account container transport in view of the distances involved and the remaining bottlenecks on the Danube impeding on speed of rotation:

Share of containers in international inland shipping (2012)

	Belgium	The Netherlands	Hungary
Goods in containers	11%	8%	0%

Source: Eurostat

- A total theoretical potential of almost 270,000 tonnes was identified
- This potential can only be fully realised in the mid-term (5 to 10 years) once some of the bottlenecks on the Danube are solved
- This potential cannot be attributed to one port but concerns the combined inland waterways capacity of the three countries
- The location of sender/receiver in the proximity of a loading infrastructure also plays a role
- The imbalance between export and import is substantial. To reduce empty returns, trade flows from Austria (and Germany) could be taken into account

Mid-term potential for inland shipping	Belgium-Hungary		The Netherlands-Hungary		Belgium and the Netherlands - Hungary	
	Exports (tonne)	Imports (tonne)	Exports (tonne)	Imports (tonne)	Exports (tonne)	Imports (tonne)
01 - Live animals	2	1	7,871	232	7,873	234
02 - Meat and edible meat offal	574	222	10,039	661	10,613	883
07 - Edible vegetables and certain roots and tubers	447	448	8,016	86	8,463	534
08 - Edible fruit and nuts; peel of citrus fruits or melons	2,539	69	2,978	24	5,517	93
12 - Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medical plants; straw and fodder	151	1,889	5,784	7,207	5,935	9,096
10 - Cereals	147	821	116	16,618	264	17,439
15 - Animal or vegetable fats and oils and their cleavage products; prepared edible fats; animal or vegetable waxes	751	967	6,335	9,150	7,085	10,117
22 - Beverages, spirits and vinegar	0	0	2,898	3,048	2,898	3,048
72 - Iron and steel	1,913	1,255	12,862	811	14,775	2,066
73 - Articles of iron or steel	525	360	2,469	451	2,993	811
76 - Aluminium and articles thereof	987	260	16,620	266	17,606	525
83 - Miscellaneous articles of base metal	20	142	7,823	13	7,843	156
27 - Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral waxes	1,261	93	1,157	633	2,418	727
29 - Organic chemicals	2,854	619	7,968	465	10,823	1,085
31 - Fertilizers	3,203	7	11,353	0	14,555	7
39 - Plastics and plastic products	7,478	1,337	20,440	504	27,918	1,842
84 - Nuclear reactors, boilers, machinery and mechanical appliances; parts thereof	761	575	7,905	10,522	8,665	11,097
87 - Vehicles other than railway or tramway rolling-stock, and parts and accessories thereof	218	799	14,642	687	14,860	1,486
23 - Residues and waste from the food industries; prepared animal fodder	1,048	726	29,384	4,556	30,432	5,283
Total	**24,877**	**10,593**	**176,661**	**55,935**	**201,538**	**66,528**

- Looking at the short run a potential more than 170,000 tonnes has been identified taking into account that some sub-categories, such as perishables, are less suited for inland shipping on the trade lane

Potential for inland shipping (taking into account current modal share of inland shipping in respective countries)	Belgium-Hungary		The Netherlands-Hungary		Belgium and the Netherlands - Hungary	
	Exports (tonne)	Imports (tonne)	Exports (tonne)	Imports (tonne)	Exports (tonne)	Imports (tonne)
10 - Cereals	147	821	116	16 618	264	17 439
15 - Animal or vegetable fats and oils and their cleavage products; prepared edible fats; animal or vegetable waxes	751	967	6 335	9 150	7 085	10 117
72 - Iron and steel	1 913	1 255	12 862	811	14 775	2 066
73 - Articles of iron or steel	525	360	2 469	451	2 993	811
76 - Aluminium and articles thereof	987	260	16 620	266	17 606	525
83 - Miscellaneous articles of base metal	20	142	7 823	13	7 843	156
27 - Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral waxes	1 261	93	1 157	633	2 418	727
29 - Organic chemicals	2 854	619	7 968	465	10 823	1 085
31 - Fertilizers	3 203	7	11 353	0	14 555	7
39 - Plastics and plastic products	7 478	1 337	20 440	504	27 918	1 842
23 - Residues and waste from the food industries; prepared animal fodder	1 048	726	29 384	4 556	30 432	5 283
Total	**20 186**	**6 588**	**116 527**	**33 468**	**136 713**	**40 057**

Source: Comtrade, Eurostat; Processed by BCI

5 Input from Companies

Buck Consultants International

Critical factors for changing to intermodal transport: an aggregation of survey results from Belgian, Dutch and Hungarian companies

	Average score Belgian/Dutch (1=not important, 5=very important)	Average score Hungarian (1=not important, 5=very important)	Aggregated (1=not important, 5=very important)
Price structure	3.6	4.0	3.8
Lead time	3.4	4.3	3.9
Environmental issues	2.2	2.3	2.3
Congestion	1.4	2.8	2.2
Safety reasons	1.6	2.0	1.8
Not applicable for the type of goods transported	1.0	2.2	1.6

Source: Port of Baja and BCI

- The most important obstacles to change regarding inland shipping are price and lead times
- The price of waterway transport depends on the price of the first mile and the last mile (20-40% of total cost). In most cases the reconfiguration of logistics chains will provide a profitable solution with short payback times
- Lead time is a more “intuitive” indicator and is in many cases based on perception

Bottlenecks of intermodal transport

	Average score Belgian/Dutch (1=not important, 5=very important)	Average score Hungarian (1=not important, 5=very important)	Aggregated (1=not important, 5=very important)
Lack of intermodal capacities	1.6	1.8	1.7
Lack of adequate transport infrastructure	2.2	3.0	2.6
Lack of distribution and warehousing capacities	1.4	1.8	1.6
Lack of interest of customers/shippers to participate in intermodal transport	1.8	2.6	2.2
Suppliers' geographical distance	2.0	3.5	2.8
Lack of sophisticated IT for information sharing	1.4	3.2	2.3
Competition from other means of transport (road)	2.8	4.7	3.8
Underperforming business links within the intermodal chain	1.0	3.7	2.6

Source: Port of Baja and BCI

- The most important bottleneck is the competition from road transport. This is indicator is related to convenience and to price.
- Lack of infrastructure, geographical distance and the inclusion of waterways in supply chains seem to be more important in Hungary than in Belgium and the Netherlands

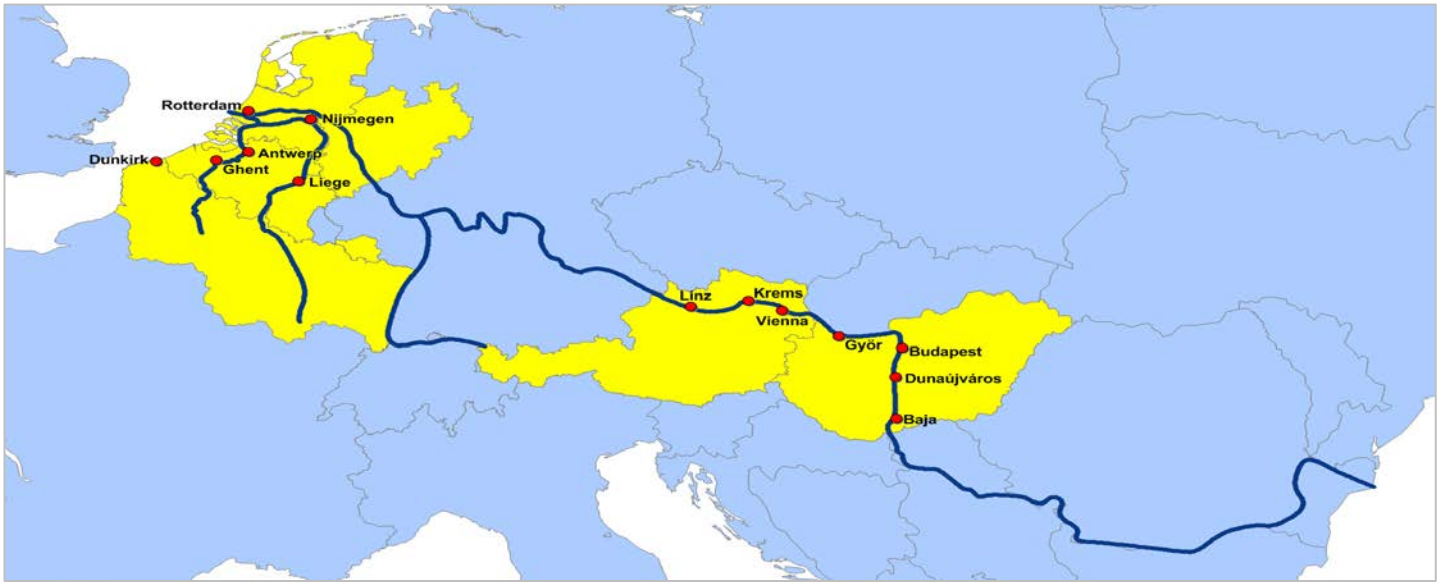
6 Conclusions and next steps

Buck Consultants International

Market Potential	+++	
• Dry Bulk		+++
• Liquid Bulk		+++
• Break Bulk		+
Main Obstacles	+/++	
• Competition from Road Transport		+++
Main Critical Factors	+++	
• Price		+++
Business Case	++/+++	

Next steps

- Project co-financed by EU
  - Aim: the development of a business case for inland shipping including a pilot project between North-West Europe and Central Europe to demonstrate its competitiveness vis-à-vis road transport
  - Geographic scope:
    - Northern France, Belgium, The Netherlands and the Ruhr area
    - Hungary and Austria



Scope of the project

- Development of a business case and value proposition for inland shipping and the promotion of modal shift
- Development of a financial tool
- Identification of actual product flows and the determination of bundling (groupage) potential to avoid empty returns
- Determining impediments
- Contacting skippers/ship owning companies
- Setting up pilot schemes
- Monitoring and operational feedback
- Market take-up and roll out

7 Themes for Discussion

Buck Consultants International

- Experience with waterway transport?
- Why are shippers not making more use of waterways on the trade relation with Hungary?
- Is a lead time of an average of 10 days acceptable?
- What is the price flexibility?

Interested in finding out more?

Buck Consultants International

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20141087

Hungarian Federation of Inland Ports– Capt. Béla Szalma

Wienerberger – Mr. Luc Felix, Logistics Manager
(construction materials)

Wienerberger

Building Material Solutions

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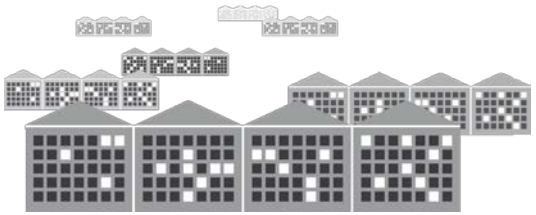
Willebroek, 29 April 2015

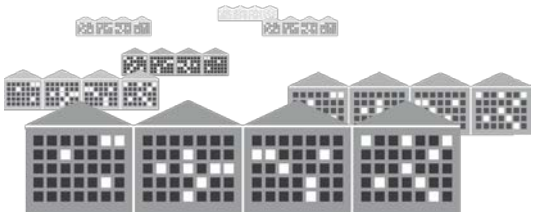


° 1819
Vienna

204
mills

30
countries

Global player in the production and offer
of building materials en building material solutions



° 1819
Vienna

204
mills

30
countries

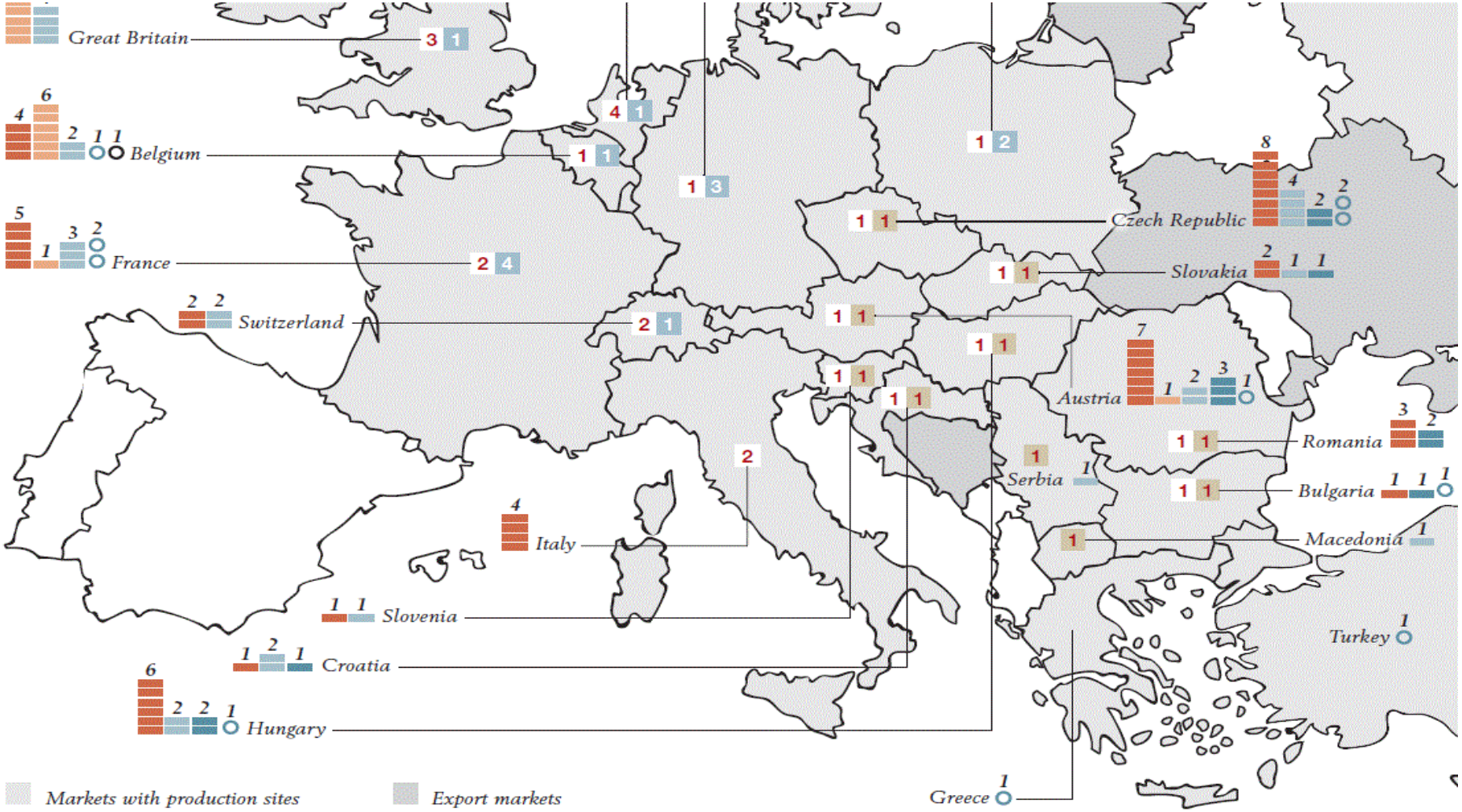
Wienerberger is the world's largest producer of bricks and No. 1 on the clay roof tiles market in Europe with 204 production sites in 30 countries,

- Clay blocks: nr.1 in the world
- Facing bricks: nr.1 in Europe, co-leader in the USA
- Clay roof tiles: nr.1 in Europe
- Concrete pavers: nr.1 in Central-East-Europe
- Ceramic pipes: leading position in Europe

Founded in 1819 as an Austrian brick manufacturer, Wienerberger has developed over the past five years into an international building materials group that combines Clay Building Materials and Pipes & Pavers businesses. Strategic milestones in the company's geographic expansion, which began in the 1980s, include market entry in North America during 1999 and the expansion of roofing systems in Western Europe starting in 2003 as well as the full takeover of the plastic pipe producer Pipelife in 2012 and the leading clay roof tile producer Tondach Gleinstätten in 2014. Today Wienerberger has a broad industrial base, high innovative strength and a strong corporate culture, and is well positioned to profit from a market recovery through organic growth.

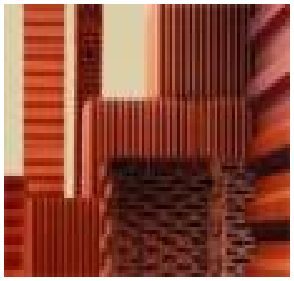
Production sites in the following countries:
Austria, Switzerland, Czech Republic, Slovakia, Poland, Estonia, Finland, Hungary, Romania, Bulgaria, Russia, Italy, Croatia, Slovenia, Serbia, Germany, Denmark, Sweden, Norway, Netherlands, Great Britain, Belgium, Macedonia, France, India, Canada, USA, Greece, Turkey, Ireland

Production sites



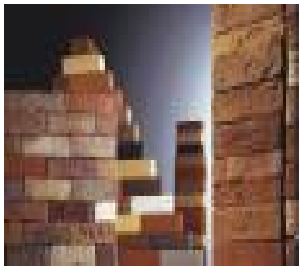
Famous Brands

- Porotherm
- Terca
- Desimpel
- Koramic



POROTHERM bricks & ceiling system

Under the name POROTHERM, Wienerberger offers a qualitatively optimized and complete system for solid brick walls and brick ceilings because brick adapts to the needs of humans like no other construction material



TERCA bricks

Under the brand TERCA, Wienerberger offers a diverse range of facing bricks and pavers. Our products are unique - like the people who live there.

KORAMIC clay roof tiles

Wienerberger clay roof tiles are sold under the KORAMIC brand and offer a wide range of different shapes, colours and surface structures. Each roof tile with its own identity and rich tradition.

Transport over water

3 waves in inland navigation

- **First wave:** bulktransport
- **Second wave:** containertransport
- **Third wave:** pallets
  - New market for inland navigation with growth potential
  - Also possible for coaster transport for example between Belgium and UK

Goods

Two potential categories of goods: building materials & fast moving consumer goods (FMCG).

- Most of the time packed on pallets.
- Stackable
- Huge diversity of voluminous, predictable flows of goods.
- Pallets have to be distributed to merchants of building materials and supermarkets which are most of the time located in cities.

Methods of loading pallets into barge of coaster

- Platform with forklifts in the hold
- Crane with forklifts in the hold
  - Crane with clambs
  - Crane with pallethook
  - Crane with cage
  - Crane with platform
- Speciliased Pallet Shuttle Barge
- RoRo vessels for sea transport
- Coasters for sea transport

1. Platform with forklifts in the hold

1. Platform with forklifts in the hold

2. Crane with clamps and forklifts in the hold

3. Crane with pallethook and forklifts in the hold

4. Crane with cage and forklifts in the hold

5. Crane with platform and forklifts in the hold

6. Speciliased Pallet Shuttle Barge

6. Speciliased Pallet Shuttle Barge

7. RoRo vessels for sea transport

8. Coasters for sea transport

Facts:

- Since 2013 we transported +/- 32.000 tons or +/- 33.100 pallets over the water in Belgium
- Since Feb 2014, 37.000 tons or 25.000 pallets via Roro vessels from Belgium to UK.
- Since Feb 2014, 125.000 tons or 95.000 pallets via coasters from Belgium to UK.
- In bulk we already transported several 1000 tons of clay and sand from Germany to several production units in Belgium.
- At this moment we have no flows between Belgium and Hungary, also because of the low value of our goods and the production sites in Hungary and neighbour countries.

Van Moer Group – Mr. Joost Van Lierde, Senior Commercial Manager (logistics service provider)


VAN MOER GROUP NV
Logistics service provider

VAN MOER GROUP is a first generation LOGISTICS SERVICE PROVIDER WITH HEAD OFFICE AND MAIN ACTIVITIES IN THE PORT OF ANTWERP

1990

HISTORIEK

TEAM	2	→	550+
FLEET	1	→	200+
M²	2.000	→	165.000
€ / YEAR	100.000	→	87.000.000
SITES	1	→	10

2015

1990

STRUCTUUR

TOP	ENTREPRENEUR	→	CEO
DRIVE	OPPORTUNITY	→	STRATEGY
MANAGE	AD HOC	→	ORGANIZED
SFEER	THEM	→	US
KAPITAAL	FAMILY	→	100 %

2015

TRANSPORT

- NATIONAL & INTERNATIONAL
- CONTAINER & GENERAL
- EXCEPTIONAL
- INTERMODAL
- DISTRIBUTION

WAREHOUSING

- FOREST PRODUCTS
- STEEL
- CHEMICALS
- FOOD
- ISO TANK CONTAINER STORAGE

FORWARDING

- WORLDWIDE NETWORK
- IMPORT - EXPORT
- CUSTOMS
- PROJECTS
- SEA – AIR – RAIL – ROAD - BARGE

SERVICES

- REPACK
- TANK CLEANING
- CONTAINER REPAIR
- STEAM HEATING
- ICT & AUTOMATION
- PROCESS OPTIMIZATION

OUR TRANSPORT DEPARTMENT

DISPATCHES OVER 200 TRUCKS FOR

CONTAINERS AND GENERAL CARGO

GENERAL TRANSPORT

CONTAINERS


vanmoergroup.com
VAN MOER TRANSPORT
VOLVO
TNC 126
vanmoergroup.com
VAN MOER TRANSPORT
TKX 882
msc

MULTIMODAL

EXCEPTIONAL

INLAND TERMINAL

MODAL SHIFT

VAN MOER GROUP

Logistics service provider

THE VAN MOER RAIL TERMINAL HANDLES

OVER 40.000 TONS OF GENERAL CARGO

WITH A STRONG FOCUS ON

CONTAINER FREIGHT STATION

ACTIVITIES

PLASTICS

FOREST PRODUCTS

VAN MOER GROUP

Logistics service provider

STEEL CARGO

VAN MOER GROUP

Logistics service provider


DISTIBUTION CENTRE

STORAGE OF CHEMICALS

VALUE ADDED LOGISTICS

EMPTY DEPOT

OUR SITE IN ZWIJNDRECHT IS SEVESO

REGULATED FOR STORAGE OF

ISO AND PORTABLE TANKS

ISO TANK CONTAINERS

VAN MOER GROUP

Logistics service provider

DEDICATED AREA FOR BROMINE

UNIEK CONCEPT FOR METAL ALKYLS

TANK CLEANING

THE NAME SILVERTRANS REPRESENTS

AN EXPERIENCED TEAM OF

FORWARDING SPECIALISTS

ARCHITECTS OF TRANSPORT

VAN MOER GROUP

Logistics service provider

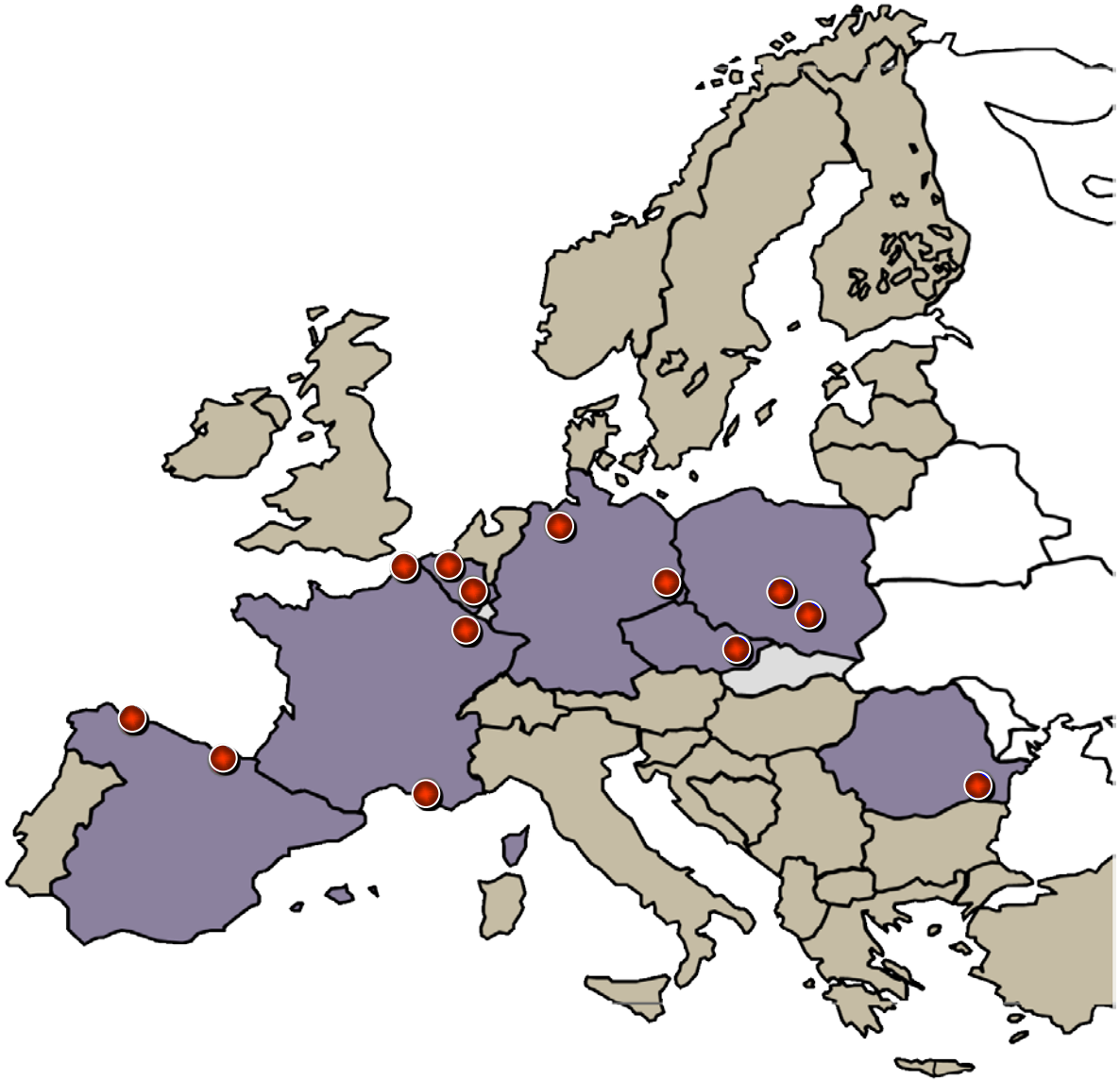

HOW CAN OUR EXPERIENCE HELP YOU
TO FIND ANSWERS
TO ALL QUESTIONS ABOUT LOGISTICS

Arcelor Mittal – Mr. David De Rocker, External Transport Manager (steel industry)

ArcelorMittal Gent – The Donau ‘Shuttle’ project

April 29th 2015 – De Rocker David

ArcelorMittal (Flat Carbon) in Europe

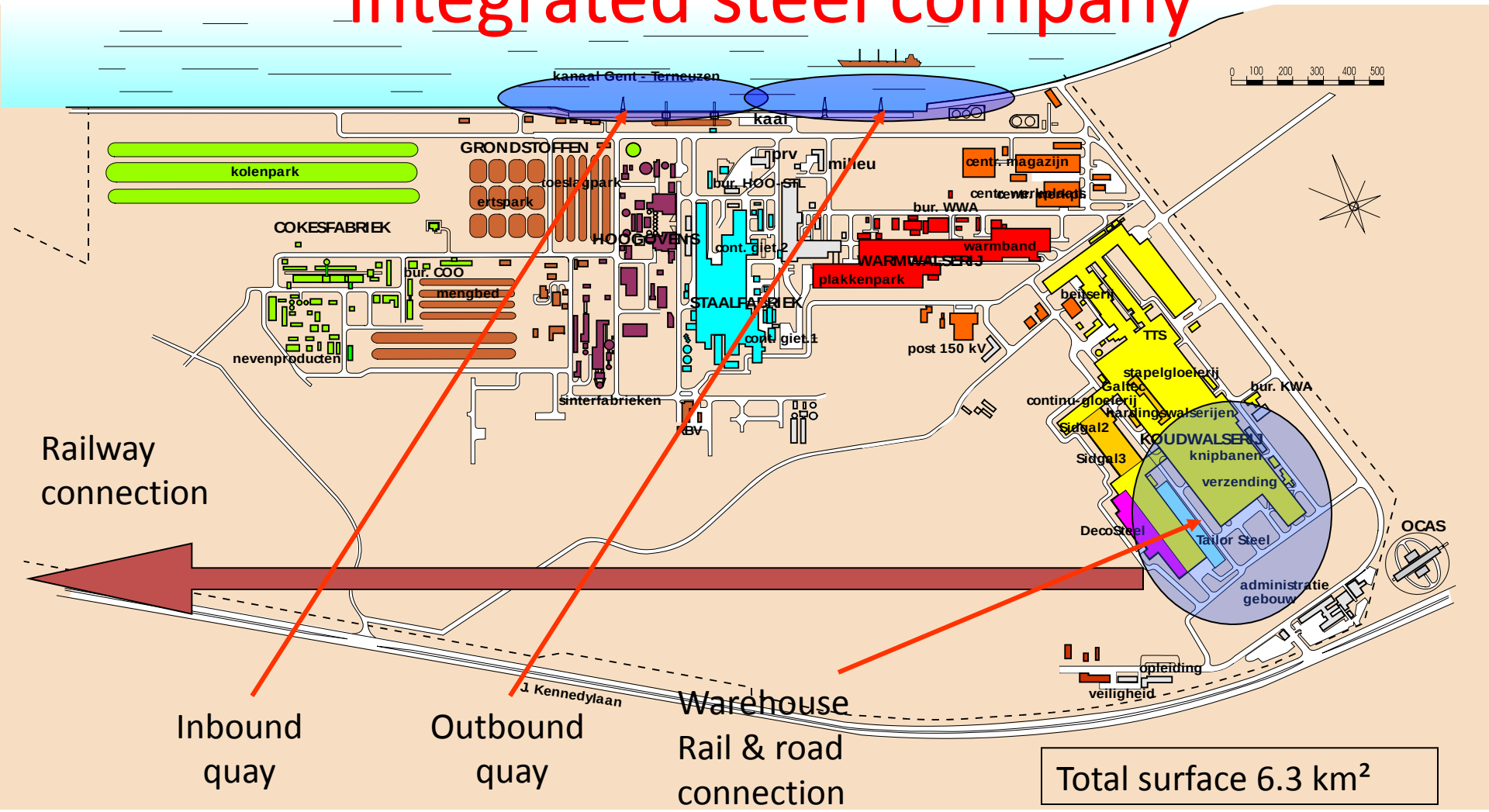


- 15 production sites in 6 countries
- Turnover 2013:
  26.6 billion USD
- Shipments 2013:
  27 million tons

Slab capacity

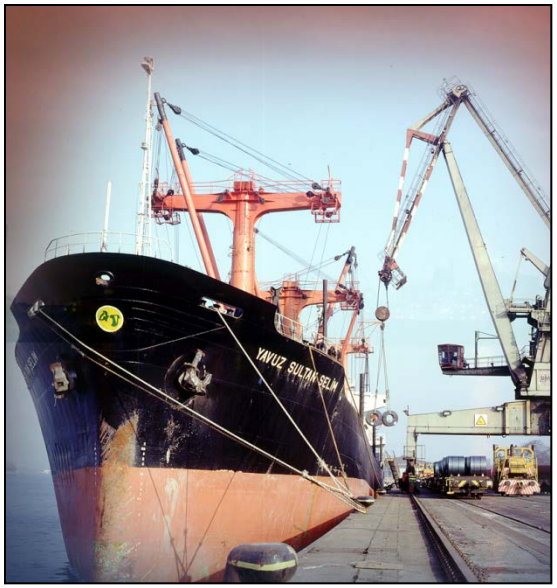
Dunkerque	6.7 Mt
Gent	5.0 Mt
Fos-sur-Mer	4.8 Mt
Galati	4.5 Mt
Asturias	4.2 Mt
Bremen	3.9 Mt
Dabrowa	3.0 Mt
Florange	2.5 Mt
Eisenhüttenstadt	2.4 Mt
Krakow	2.0 Mt
Sestao	1.7 Mt
Ostrava	1.1 Mt
Total	41.8 Mt

ArcelorMittal (Gent) : maritime integrated steel company



Steel terminal Infrastructure

- 3 Harbour Cranes : 2 Double boom crane and 1 Gottwald crance
- 3 x 450 m tracks under crane reach, 6 x 180 m stock tracks alongside
- 180 internal wagons for coil transport and intermediate storage
- Variety of spreaders, beams, slings, …

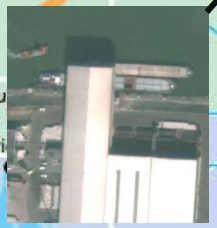


Short Sea destinations 1.25 mio ton

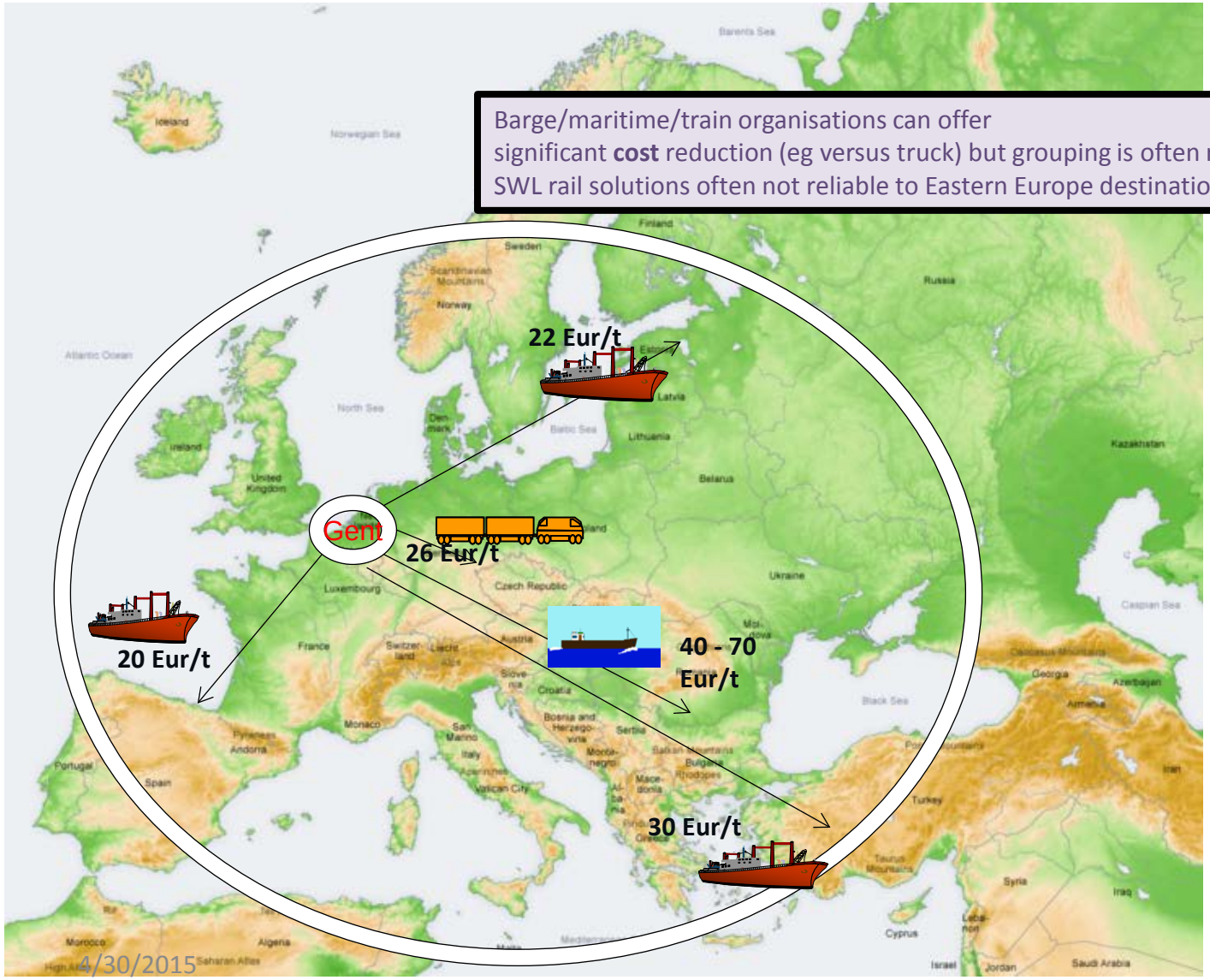
Inland waterways 750 KT

- Total number of barges loaded in amount to 500-600 (Steel products)
- Barge size varies from 300 Ton up to 3000 Ton

Geographical location
of ArcelorMittal Gent and link to its inland water customers



In general : why explore massification potential for steel ?



BD-N mills using Rhine-Main-Danube to deliver steel coils to SK, HU, SB, RO. Why was / is it difficult ?

- Divers final destinations, long lead time, fragmentation in supplier market (market ARA – Austria and Austria-Roemania), lack of knowhow on Danube conditions (waterlevel, ice risks), historically customers got used to truck deliveries (fast and flexible).

- Giving a good transparency (linked to route characteristics) to agency/customer and supplier is not easy because :

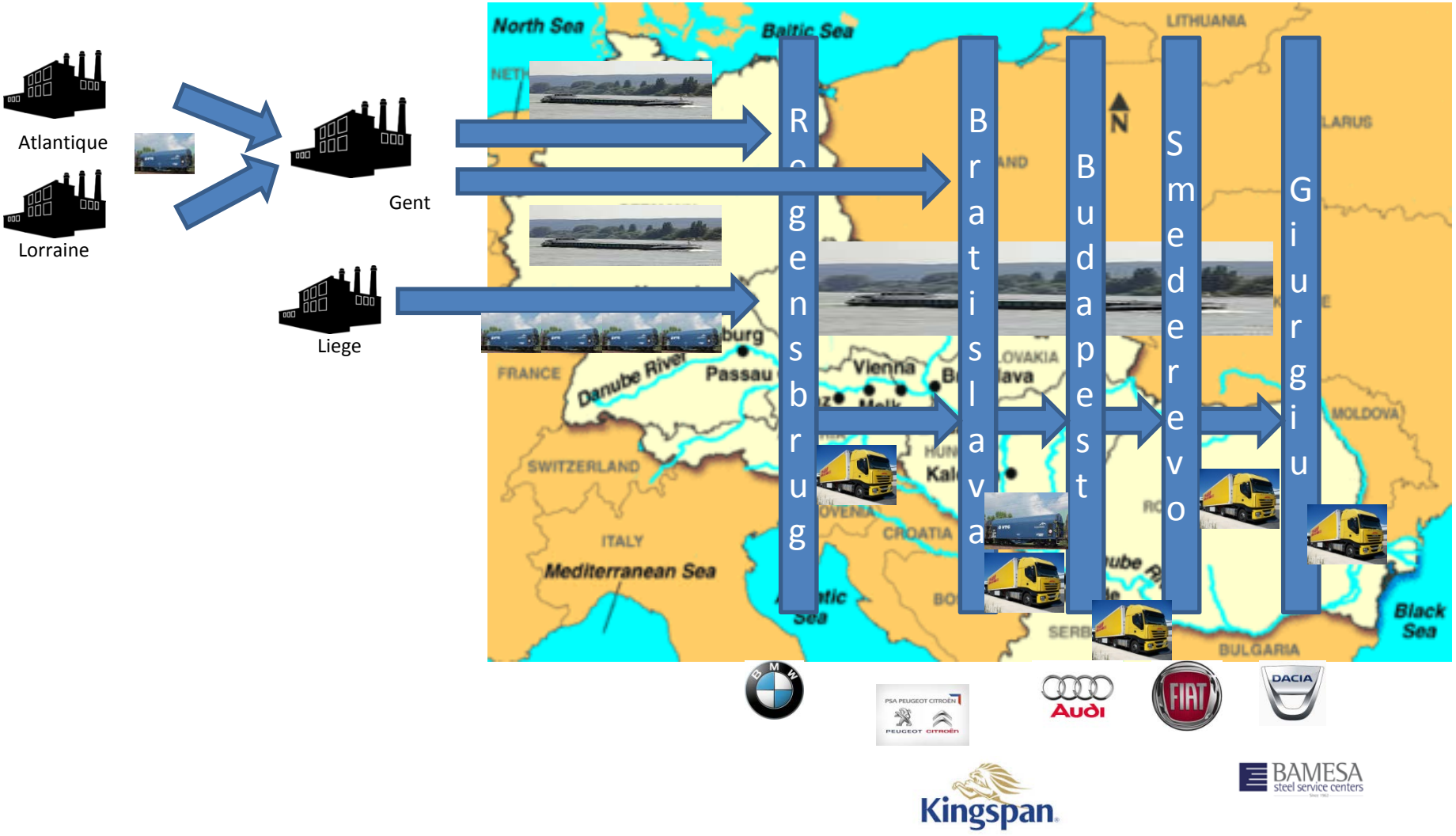
  - multi-leg (depending on design between 3 and 4 transport legs)
  - multi-transport mode (barge + rail + truck)
  - multi-customer (both industry and automotive involved)
  - multi-supplier (barge, port handling, warehousing, haulage)
  - multi-country (from BE and FR to SK, CZ, AU, HU, SB (non-EU), RO)
  - multi-TMS (different Transport management systems in use in different mills)

- Frequency and barge size of sailings limited at mills and Regensburg : coordination and arbitrage on all cargo is needed

- Risk of bottleneck situations : limited storage space at Danube ports.

→ Central coordination + central TMS support is needed
→ De-fragmentation of route into 2 parts offers flexibility
→ Supplier with maturity and experience in all countries is needed

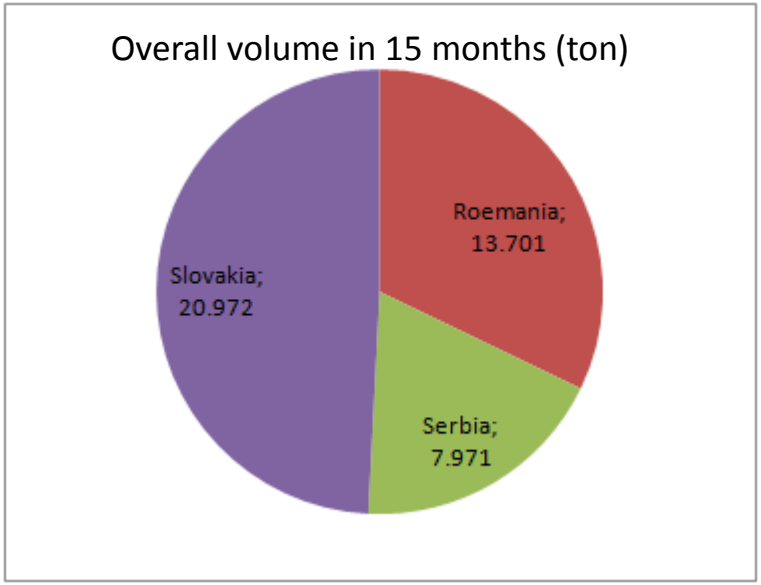
Danube logistic route : complexity + flexibility

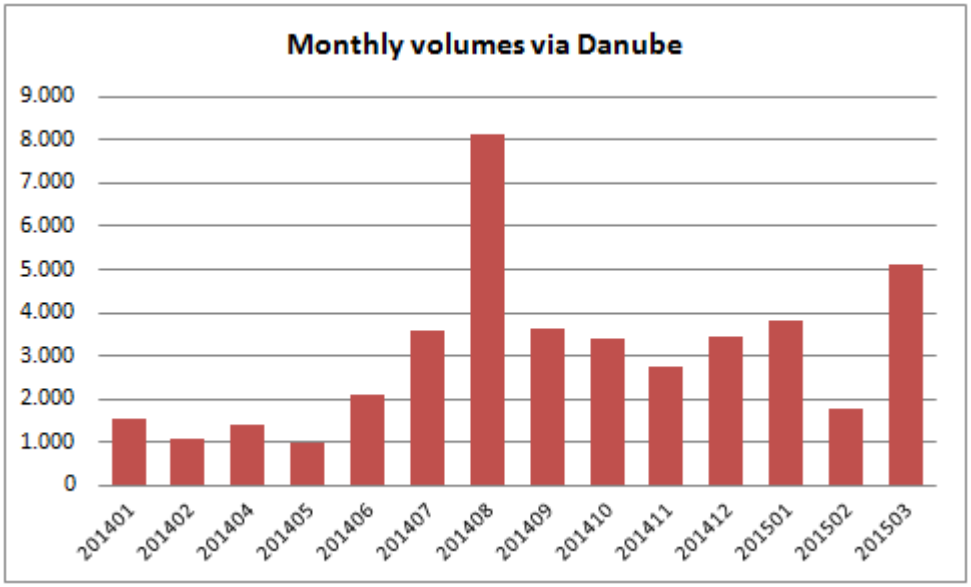


Impression about Danube logistic route to delivery eastern Europe AM customers via Danube (3-6 week lead time)

Results 2014-2015

- Single shipments until mid'2014
- Start-up of shuttle system since June 2014





Questions?

Mrs. Catrien Scheers, Ambassador of Fast Lines (transport group)

Fast Lines Belgium
Catrien Scheers
www.fast-lines.com

29 April 2015 ILDE: Intermodal Links to the Danube Estuary

WHO is Fast ?

by Catrien Scheers

President Fast Group

www.fast-lines.com

Fast Group

- Total logistics service provider
- Financially healthy and Family owned
- Long term partnerships
- Specialized in breakbulk
- Short Sea Shipping
- Sofa Style Service

Fast assets

- Mentality: Head up in the sky, feet on the ground
- People: clients, suppliers, Fast Staff
- Network of companies in Europe
- Fast terminals in Szczecin, Poland
- Fast terminals in Drogheda, Ireland
- Small fleet of Fast Coaster vessels

Fast Fleet

Mv Fast Sam at ASI Antwerp

Mv Fast Jef at Fast Terminals Poland

www.fast-lines.com

Challenges for Ilde

- 2008: connecting port of Ghent with port of Constantza
- Challenges :

THANK YOU !

www.fast-lines.com