

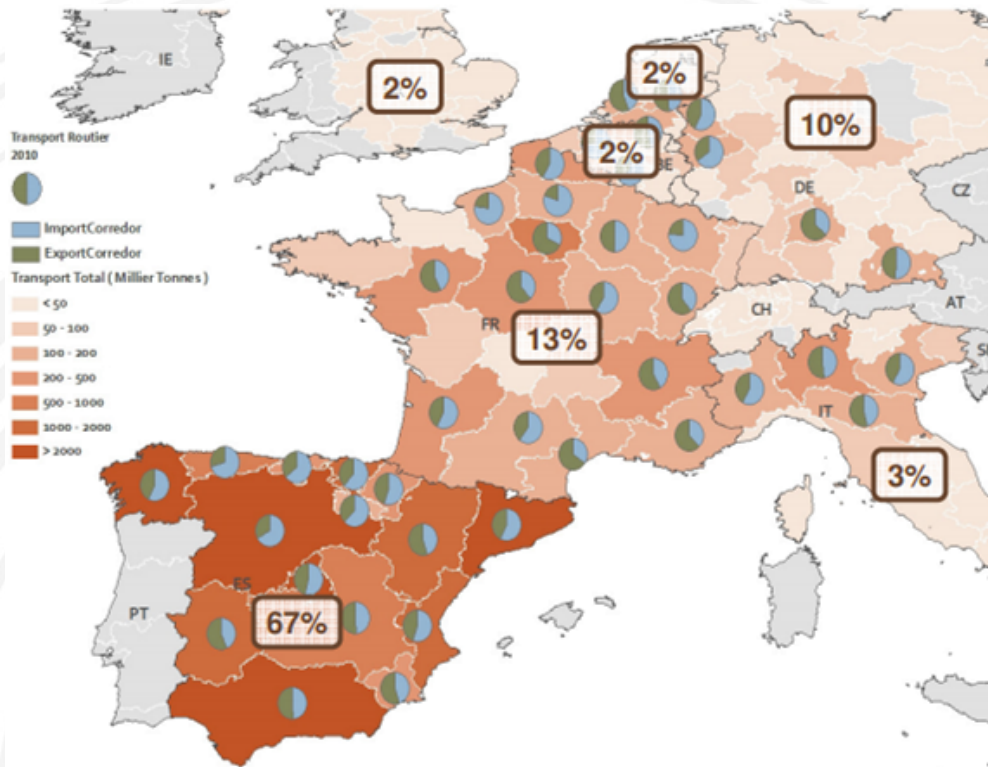
# International Traffic Perspectives

10th Atlantic Corridor Advisory Group Meeting



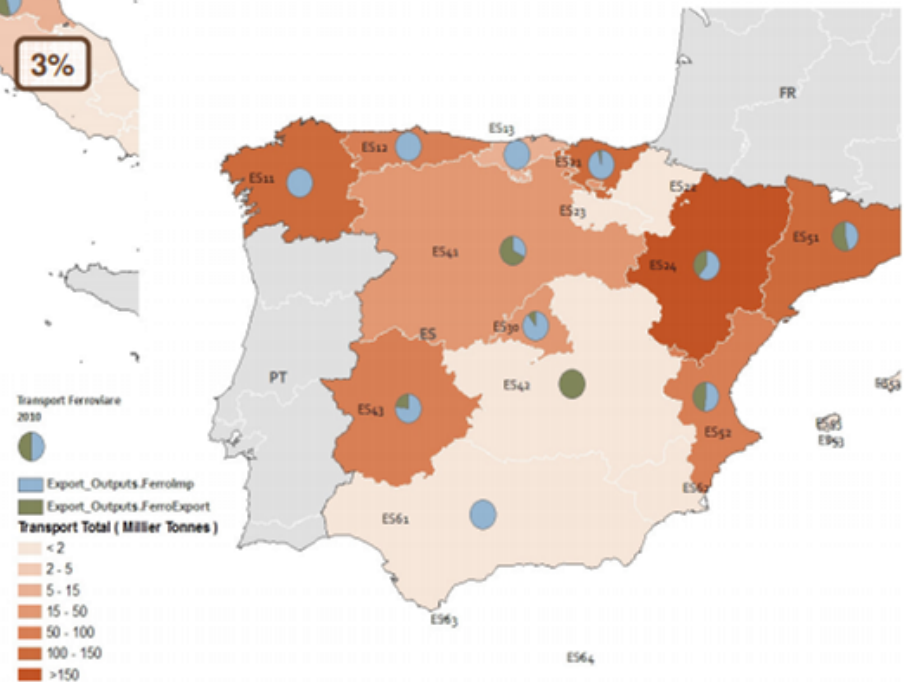
**Bruno Silva**

# PORTUGUESE INTERNATIONAL MARKET



**Road Mode**  
(freight origin & destination, 2010)

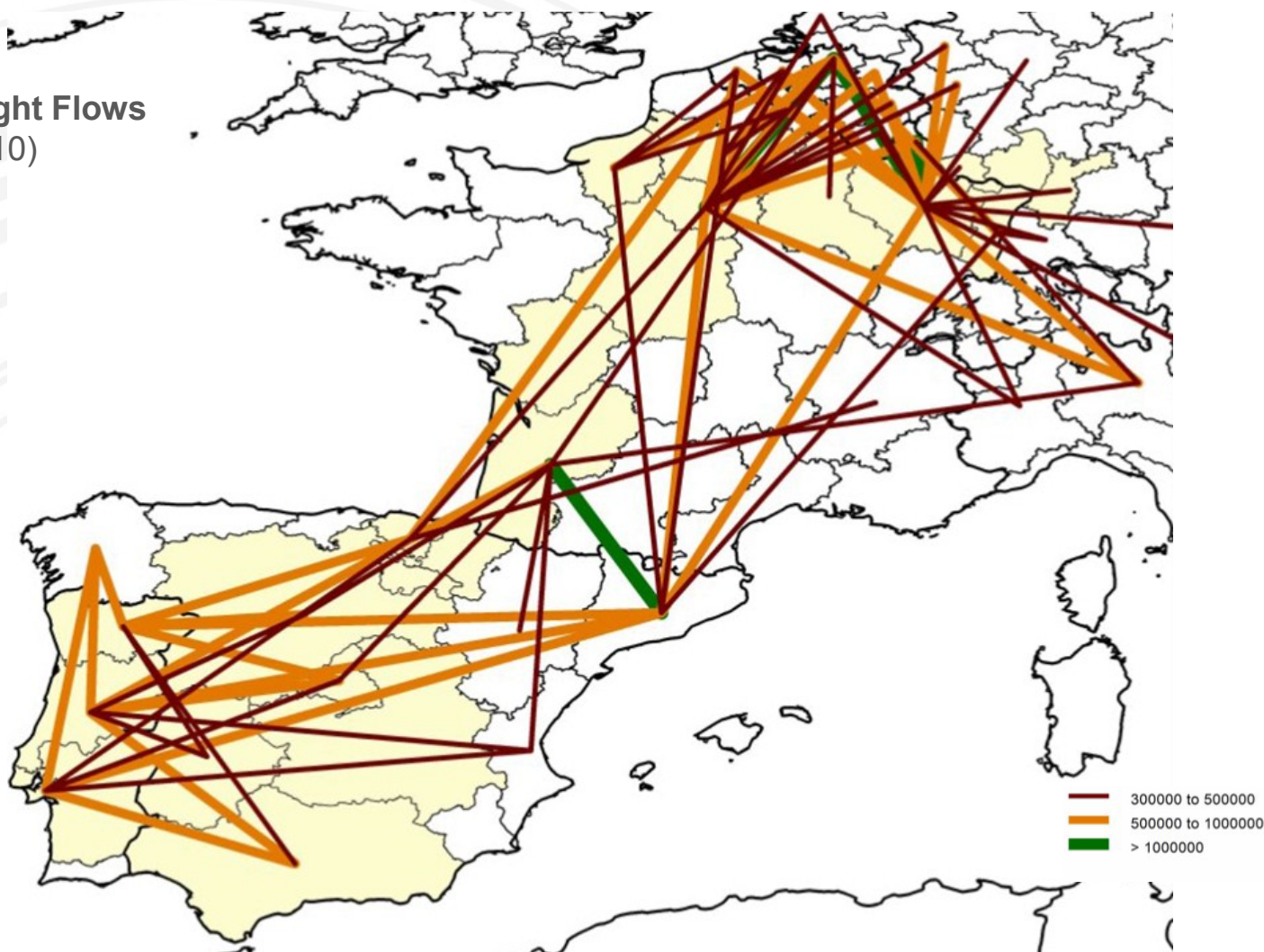
**Rail Mode**  
(freight origin & destination, 2010)



Source: IP and RFC4 Traffic Market Study

# PORTUGUESE INTERNATIONAL MARKET

Land Freight Flows  
(2010)

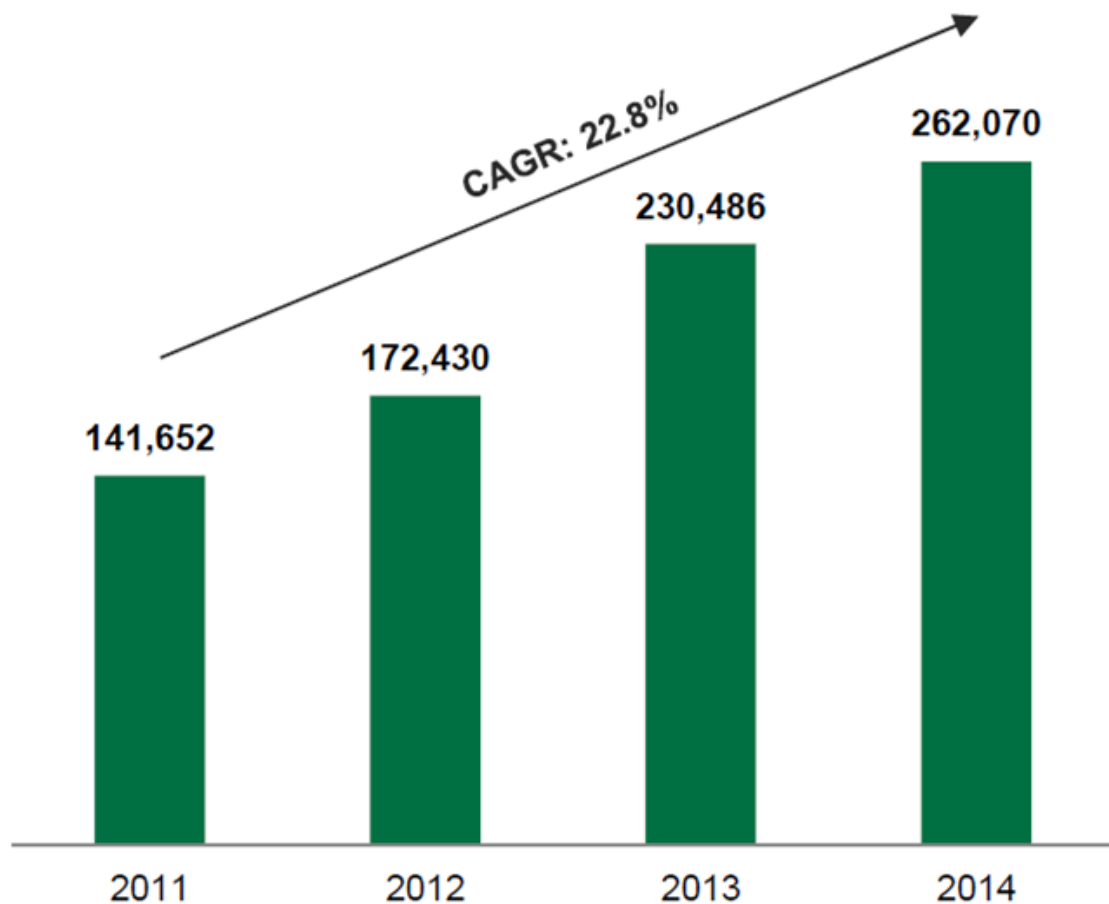


Source: Atlantic Core Network Study, 2014

**CPCARGA** Logística e Transportes Ferroviários de Mercadorias, SA

# CP CARGA INTERNATIONAL GROWTH

Activity performance (thousand tkm)



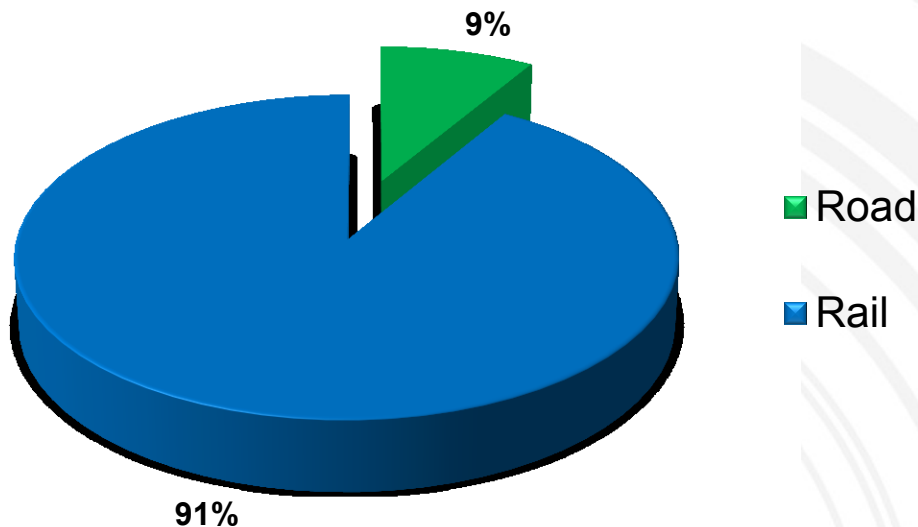
✓ SPAIN

✓ 10% Total Activity

Source: CP Carga

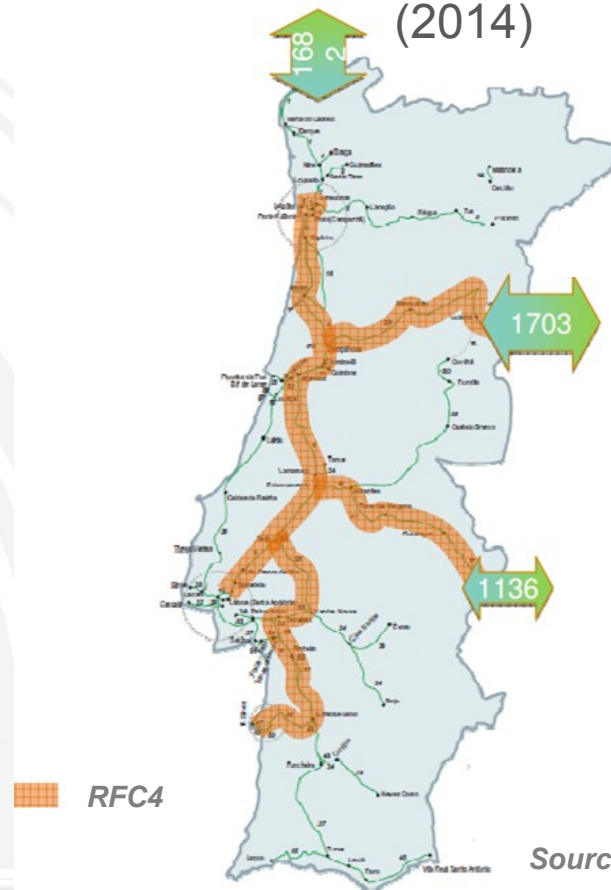
# HOWEVER!

## Land International Transport by Mode (2014)



Source: INE

## Number of International Trains (2014)



Source: IP

**WHY??**

# RAILWAY TRADITIONAL COMPETITOR

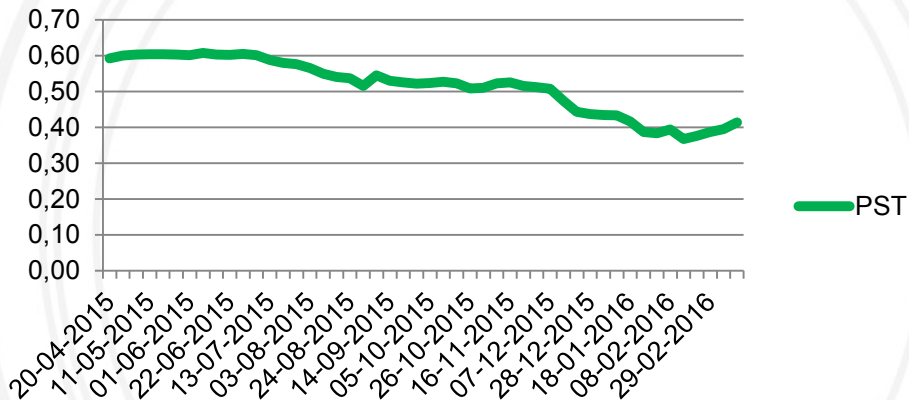
## ➤ TRUCK

- Flexibility
- Infrastructure
- Competitive
- Door-to-Door solution

## ➤ What is the market looking for

- Flexibility
- Capacity to quickly adapt/react
- Competitive prices
- Integrated services

### Diesel Price (PWT)



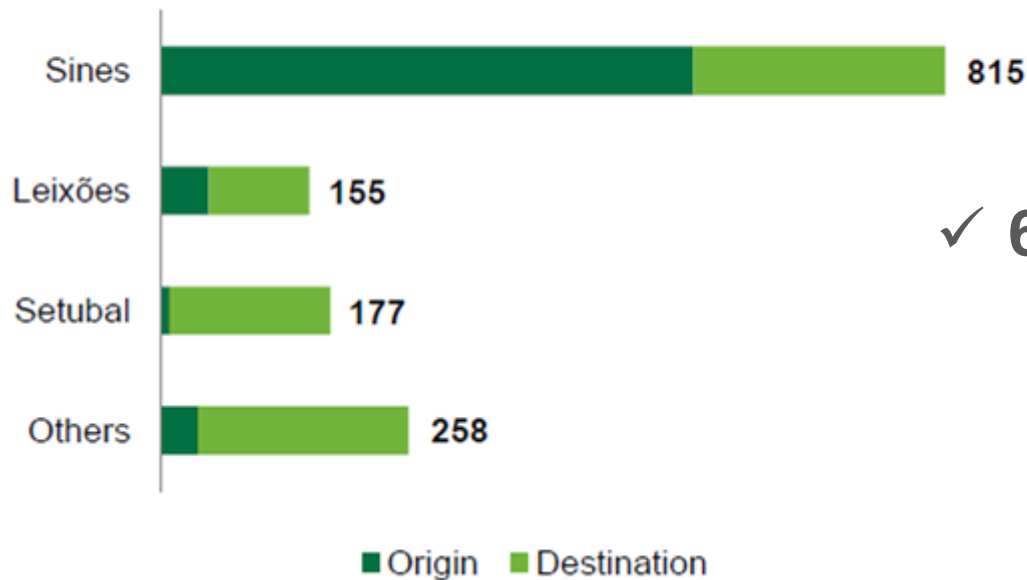
Source: DGEG, price without taxes

- ✓ **22% Reserve Trains Cancelled by Clients**
- ✓ **25% Trains Last Minute Request**

# VISION

## Integration of the supply chain Railway as part of the supply chain

Tkm (million)



Source: CP Carga

✓ 67% Total Activity  
Linked to Ports

# INTEGRATED SOLUTIONS



- ✓ **Multiclient Services**
- ✓ **High Frequency Corridors**
- ✓ **Last Mile Service**
- ✓ **Rail Yards Management**
- ✓ **Storage and Distribution**
- ✓ **Documentation**

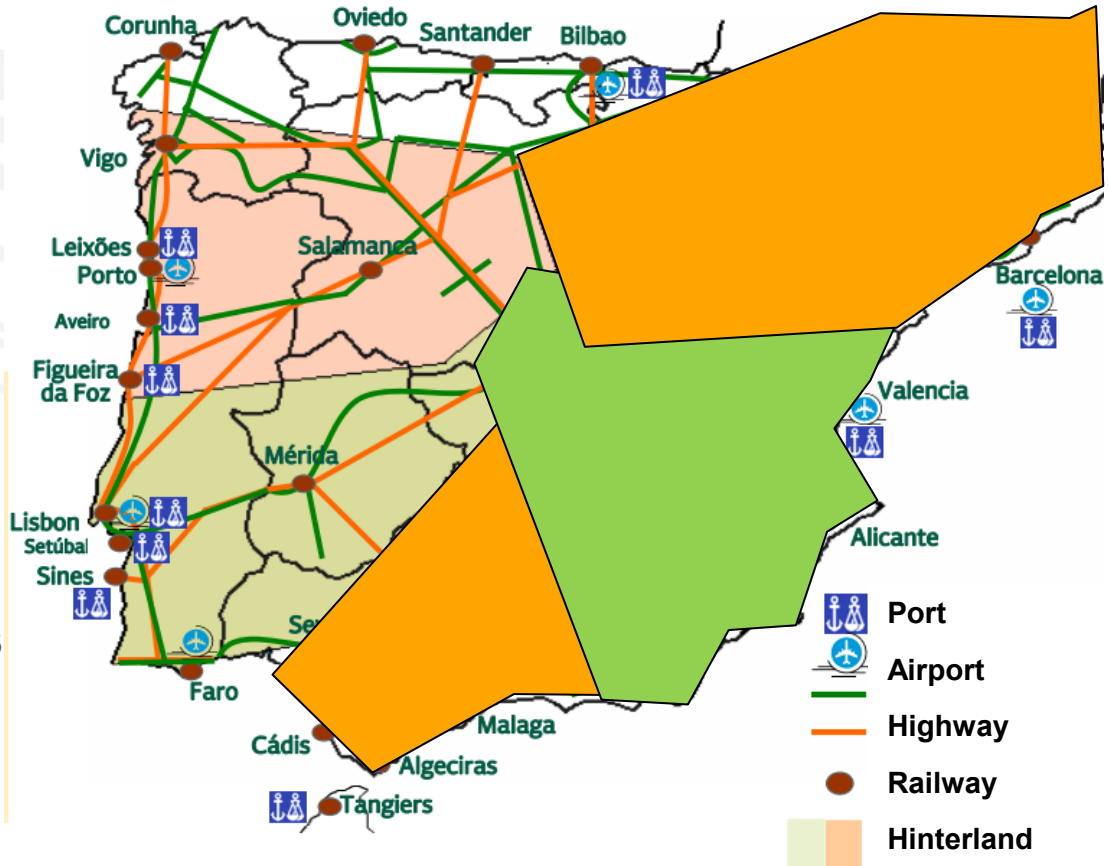
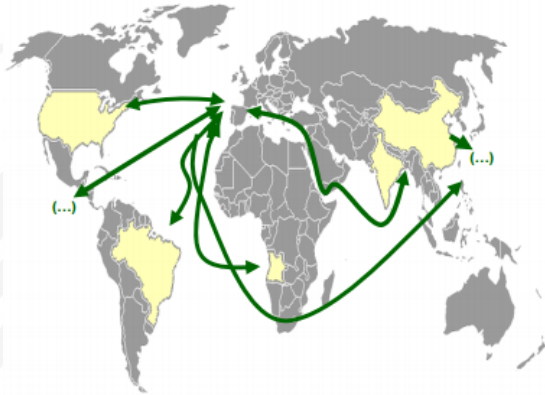
**INTERMODAL = 36%**  
*Yearly growth = 8%*



# INTERNATIONAL PRESPECTIVES

1. **Support the Ports Hinterland Expansion**
2. **Continental Traffic Integrated Solutions**

# SUPPORT THE PORTS HINTERLAND EXPANSION



## CHALLENGES:

- Interoperability/Cross Borders
- Documentation/Customs
- Volatility
- Quick response capacity
- Seasonality response

# CONTINENTAL TRAFFIC INTEGRATED SOLUTIONS

Portugal Road Flows  
Across the Corridor  
(2010)



Source: RFC4 Traffic Market Study

## CHALLENGES:

- Corridor Portugal-Irún/Hendaye
- Several O/D >> One D/O
- Local Network Distribution
  - Scale generation
- Rail Motor-Way
- Seasonality Response
- Adjustment Capacity

# ATLANTIC CORRIDOR TEASING

1. Short Term Path Requests
2. PAP Adjustment Possibility
3. Taylor Made International Path Requests
4. Several O/D >> One D/O Requests
5. Infrastructure Fees Uniformization
6. Proximity to Clients
  - ✓ Be Proactive/Visit your Clients
7. PCS Training Locally
  - ✓ Bring the Training to Clients

ONE FACE C-OSS

The background features a series of concentric, light gray circles that create a ripple effect, centered on the left side of the slide. The circles vary in thickness and are spaced out, creating a sense of depth and movement.

# Thank You!

**Bruno Silva – Deputy Managing Director**

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