

# ROLE OF FREIGHT FORWARDERS AND LOGISTICS IN INTERMODAL TRANSPORT CHAINS

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## UTIKAD – Association of International Forwarding and Logistics Service Providers

- National and International Transportation:  
Road, Air, Sea, Rail and Combined Transportation
- Logistics Services
- Approx. 400 Members & 50,000 Direct Employment & 5 USD Billion Turnover

- ✓ 95 % of Air Transport
- ✓ 70 % of Road Transport
- ✓ 60 % of Sea Transport
- ✓ 20 % of Rail Transport

carried out by our members in Turkey



# NATIONAL & INTERNATIONAL PLATFORMS



## VOICE OF INDUSTRY IN TURKEY



## VOICE OF INDUSTRY IN THE WORLD



## The Process Of Designing & Managing Information, Product & Service Throughout The Supply Chain

The chain can extend from the delivery of supplies for manufacturing, through the management of materials at the plant, delivery to warehouses and distribution centers, customs clearance, stock management, sorting, handling, packaging, supervising, insurance and final distribution to point of consumption.



## Logistics is The Art of Making Ready;

➤ For the Right Customer

➤ Right product

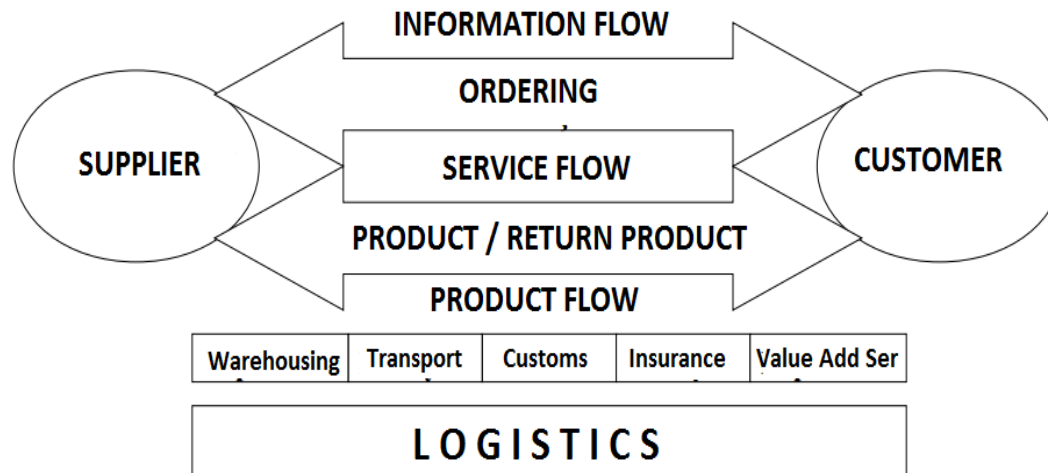
➤ In the Right Quantity

➤ With the Right Cost

➤ At the Right Time

➤ At the Right Place

➤ in the Right Shape





# COMBINED, MULTIMODAL AND INTERMODAL TRANSPORT

## MULTIMODAL TRANSPORT



The Carriage of goods by two or more modes of transport.

## COMBINED TRANSPORT



The Intermodal transport where the major part of the journey is by rail, inland waterways or sea and any initial and/or final legs carried out by road are as short as possible.

## INTERMODAL TRANSPORT



The movement of goods in one and the same loading unit or road vehicle, which uses successively two or more modes of transport without handling the goods themselves in changing modes.



# INTERMODAL TRANSPORT

System of Transport  
whereby two or more modes of transport are used  
to transport the same loading unit or truck in an integrated manner,  
without handling the goods themselves in changing modes,  
in a 'Door To Door' transport chain

## INTERMODAL TRANSPORT

ACCOMPANIED



UNACCOMPANIED

The Whole Truck With Semi-trailer  
Loaded On The Railway Wagon

Loose Units (Container or Semi-Trailer)





# INTERMODAL TRANSPORT

Intermodal transport is often only viable for distances of more than 300-500 km.



Effective national and international cooperation and harmonization of technical, legal and transport policy informations.



The industry can operate seamless intermodal transport operations that are economically viable and ecologically sustainable and are an integral part of global and regional logistics supply and distribution chains.



## The European Commission speaks;

- 38% increase in the intra-European freight transport market (all modes) over the next 10 years.
- Increase in rail freight market share of some 8% to 15% by the 2020 time horizon.
- A large number of European railway companies have adopted an aggressive strategy in which combined transport plays a key part.

These figures demonstrate that to cope with the growth projected in the White Paper, and enable the railway companies to put forward tailored and competitive products on the market, it is vital to ensure sufficient availability of infrastructure capacity.

# INTERMODAL TRANSPORT

Today, Over 100 European Companies Transport Annually Around  
18 Million TEU In Intermodal Road-Rail Transport Operations

- 17 million TEU as unaccompanied (containers, swap-bodies, semi-trailers)
- 1 million TEU in accompanied traffic (complete trucks).



On the river Rhine around 2 millions TEU of containers are transported annually and thus alleviate congestion along the very important North-South European road and railway corridors

# INTERNATIONAL COMBINED TRANSPORT

## International combined transport 2002/2015

Market segment	TEU (mill)		Net tonnage (mill tonnes)		
	2002	2015	2002	2015	2015/2002
Unaccompanied	3.48	8.7	44.1	103.6	+ 135 %
Accompanied	1.26	1.5	10.4	12.4	+ 19 %
<b>Total</b>	<b>4.74</b>	<b>10.2</b>	<b>54.5</b>	<b>116.0</b>	<b>+ 113 %</b>

➤ According to a latest study covering the 18 trans-European corridors, international combined transport will increase from 54.5 mill tonnes in 2002 to 116.0 mill tonnes in 2015.

# RAILWAY, COMBINED AND INTERMODAL TRANSPORT DEVELOPMENTS IN TURKEY

- EU Twinning Project - Turkey & Spain
- Establish General Directorate of Transport of Dangerous Goods and Draw Up Combined Transport Legislation
- Liberalization of Turkish Railways
- Intermodal Project of Turkey: BALO



# STRENGTHENING INTERMODAL TRANSPORT IN TURKEY



## EU Twinning Project - Turkey & Spain

### PROJECT ACTORS

Turkish Ministry of  
Transport, Maritime  
Affairs and  
Communications

Delegation  
of  
EU to Turkey



Spanish Ministry of  
Transport and Public  
Works

Spanish Secretary  
of State for  
International  
Cooperation



**UTIKAD:**

One Of The  
STAKEHOLDERS



# DRAFT COMBINED TRANSPORT LEGISLATION



Serves as a Model in Europe

General Directorate of Transport of Dangerous Goods and Combined Transport aims to improve and regulate combined, intermodal and multimodal transport in Turkey

**UTIKAD makes a huge contribution to prepare this legislation**

*Planned Validity Date : in 2014*



# LIBERALIZATION OF TURKISH RAILWAYS

## “Rail Transport will increase in Turkey”

- Liberalization Law has entered into force as of 1 May 2013
- TCDD will be the operator of the national rail infrastructure network
- Turkish State Railways Transportation Company is established
- Private companies can operate own locomotives & wagons







# BALO PROJECT



“Great Anatolian Logistics Organizations Project”

**UTIKAD:**  
Shareholder of BALO



## Block Trains Between Turkey- Germany

Started With : 2 Block Trains per week per direction  
 Current Struation : 3 Block Trains per week per direction  
 After June 2014 : 5 Block Trains per week per direction  
 At the End of 2014 : 8 Block Trains per week per direction

### REGIONAL PERCENTAGE IN EXPORT AND IMPORT

REGION	EXPORT	IMPORT
IZMIR MANISA	% 16,4	% 22
ANADOLU	% 38,6	% 5
TEKIRDAG	% 45	% 73

### NUMBER OF TRAIN AND CONTAINER TRANSPORT

TRANSPORTATION	EXPORT	IMPORT
TRAIN	63	59
CONTAINER	1764	873

### EXPOR-IMPORT PERFORMANCES MEASUREMENT BETWEEN TEKIRDAG – DUISBURG/KOLN

NUMBER OF TRAIN	SUCCESS RATE
TRAIN ON TIME	% 90
+ 1 DAY DELAY	% 4
+ 2 DAYS DELAY	% 4
COMPELLING REASON(+ 3/+ 7)	% 2
CANCELLED TRAIN	NON

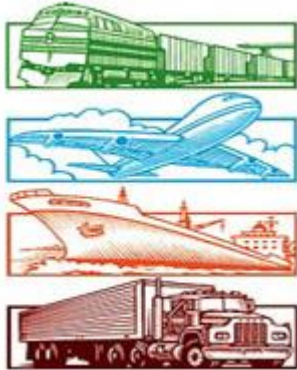
# ROLE OF FREIGHT FORWARDER

Role of Freight Forwarders is to unite and inform and guide all stakeholders in the intermodal transport chain based on best practices, market and customer demands and worldwide new technologies and innovations.



# ROLE OF FREIGHT FORWARDER

Covering the role of each stakeholders of intermodal transportation starting with original/final road leg and then intermodal terminal operators, railway infrastructure managers and railway train operators. By this, Freight Forwarders have the responsibility of organizing correct and uninterrupted and sustainable intermodal transport chain from beginning till end.



To have a Sustainable Intermodal Transport system;

- Evaluate the current full & used capacities of railway infrastructure and intermodal terminals
- Make market searches and analysis

The results of the analysis enable us to make our future plans especially to construct special intermodal terminals and railway routes to ensure modal shift towards rail.

# IMPROVE THE UTILISATION OF RAIL INFRASTRUCTURE FOR INTERMODAL TRANSPORT CHAINS



- ➔ A lack of national coordination of intermodal operations chain may jeopardize the growth of intermodal transports. This could be overcome by setting up bilateral/trilateral cross-country coordination groups or, on a larger scale.
- ➔ High and sustainable reliability of operational use of infrastructure and all related intermodal operational services for customer satisfaction to catch shippers' base volumes currently carried by road freight.
- ➔ Being the interface between road and rail, constructing intermodal terminals are the most crucial part of the Intermodal transport chain. These terminals should be operated by “neutral” companies permitting non-discriminatory and be supported by ITS Intelligent Transport Systems providing a paperless transport organizations where as possible.



# IMPROVE THE UTILISATION OF RAIL INFRASTRUCTURE FOR INTERMODAL TRANSPORT CHAINS



- Having qualified staff should also be planned in advance. The “human factor” is probably the most important driver for an efficient use of intermodal transport chains.
- Mode independent services and regulations at terminals, harmonization of these regulations
- Standardization of stuffing and stripping of ITU ( Intermodal Transport Unit )
- Substitution of shifting of volumes from national and international road freight to intermodal transport operations as well as transport related taxes and duties that influence the efficiency and cost of intermodal freight transport
- Increased train length and total max weight for some routes



# IMPROVE THE UTILISATION OF RAIL INFRASTRUCTURE FOR INTERMODAL TRANSPORT CHAINS



- Advanced wagon technologies to be able to transport 3m height swap boides and 2x45 pwhc cntrs on one wagon on top of each other / double stack
- Green Logistics concept should also be applied into intermodal transportation methods
- Efficient and appropriate intermodal loading units to be used should be decided
- Regulations should be prepared for safety of intermodal transport operations
- Liability provisions should be defined for intermodal transport operations
- Statistical information data base should be collected
- KPI (Key Performance Indicators) for transport services, intermodal infrastructure and border management processes should be developed



# GOVERNMENT'S RESPONSIBILITIES



## Governments Need To Set & Maintain The Institutional Framework as well as;



- ➔ The rules of the game to ensure that the design and management of Freight transport and intermodal transport services are carried out in line with national transport policy objectives and do respect also other economic, social, environmental and spatial policies, rules and regulations set and enforced by public authorities.
- ➔ The provision of adequate infrastructures, such as roads, railway lines and inland waterways, even though the construction and operation of such transport lines can and is already done in some countries through public-private partnerships (PPP).
- ➔ National transport policies must be coordinated and harmonized with that of other countries and regions to respond to the challenges of cross-border operations not to effect negatively the competitiveness of products and services.





## The Intermodal Transport Chain Deserves To Be Taken More Seriously “It Is The Only Solution To The Growing Problem Of Transport Infrastructure Congestion”



With the sharply increasing number of vehicles on the roads and the ever decreasing possibilities for creating enough new resources to cater to demand, road traffic threatens to come to a grinding halt. Clearly other transport modes – especially railways, inland waterways and ocean shipping - will have to play a greater role to avoid the chaos that looms ahead. To cope with the extra traffic prompted by economic growth, the different modes need to combine their services to create a sustainable and efficient transport system which must be environmentally-friendly and not put the competitiveness of our economy at risk.

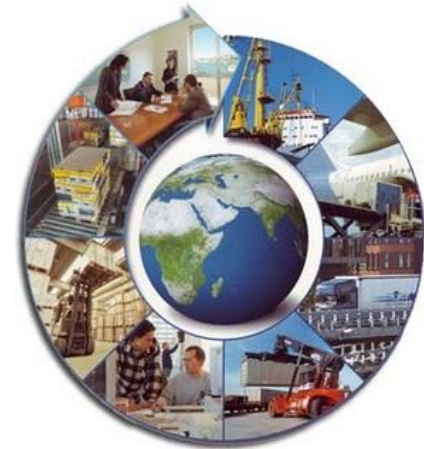
## The Only Way To Establish A Proper Balance Among The Different Modes of Transport;



To understand its at all times complex ramifications, at the right levels, in other words, by all the stakeholders in the transport process. The transport enterprises and their customers, the politicians who create the necessary political conditions and, last but not least, the scientists and researchers responsible for designing the future transport system.

## More Than Ever, We Need Intelligent Intermodal Transport Chains That

- ➔ Optimise cost,
  - ➔ Minimize environmental impact,
  - ➔ Speed up of delivery of products in the same shape at production point,
- in the internal market and worldwide.



We believe that working together with all stakeholders, the economically and environmentally sustainable solutions will be realized and executed in a correct way.

# FIATA WORLD CONGRESS 2014 - ISTANBUL



## FIATA 2014

WORLD CONGRESS  
13-18 October 2014  
ISTANBUL

SUSTAINABLE GROWTH IN LOGISTICS



**13 - 18 OCTOBER 2014**  
**BOMONTI HILTON HOTEL & CONFERENCE CENTER**

**[www.fiata2014.org](http://www.fiata2014.org)**



*Congress Motto:*

# **SUSTAINABLE GROWTH IN LOGISTICS**

*Turkey Offers The Role of a “Laboratory” in  
« Sustainable Growth in Logistics »*

# PARTICIPANT OF FIATA ISTANBUL 2014



**More than 125 Countries, More than 1000 Participants  
will come together at  
Istanbul – 2014 World's Capital of Logistics**

## *The Most Expected Participant Countries*



## *Participant Profile*

- *Logistics Firms*
- *Freight Forwarders*
- *Land, Air, Sea, Rail, Combined Transport Firms*
- *Cargo and Courier Transporters*
- *Logistic Centers and Warehousing Firms*
- *Customs Clearance Companies*
- *Transport Equipments and sub-supplier Firms*
- *Related Sectoral NGOs*
- *Ministries, and Related Institutions and Organizations*
- *Producer, Importer, and Exporter Firms*





# OPPORTUNITIES of FIATA 2014 ISTANBUL



## FOLLOW EMERGING TRENDS AND DEVELOPMENTS



## EXPAND YOUR AGENCY NETWORK WITH ONE ON ONE MEETINGS



## SET UP YOUR OWN MEETING



## MEET YOUR TARGET AND POTENTIAL CUSTOMERS



# CONTACT DETAILS



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# Thank You

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