

A wide-angle photograph of an industrial landscape. In the foreground, a red shipping container sits on a train platform. In the background, a concrete bridge spans a body of water, with a white truck driving across it. Wind turbines and power line towers are visible against a clear blue sky. The bottom of the image features a decorative graphic with overlapping blue and yellow wavy shapes.

# Port of Rotterdam Global Hub & Industrial Cluster in Europe Expertgroup Euro-Asian Transport Linkages

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# Port of Rotterdam: Global Hub & Industrial Cluster

- Total port area 12,500 hectares = 17.500 UEFA soccer pitches (land & water);
- Throughput approx. 442 million tons in 2013 of which 12 mio containers (TEU);
- PoR is larger than numbers 2, 3 and 4 in Europe together;
- Direct gross added value € 13 billion (2.1% NL GDP)
- 33.000 Sea-going vessels and 100.000 inland vessels
- Total employment 140,000 people (90,000 direct and 50,000 indirect)





# European Market

- EU: 500+ mio consumers
- 65% hinterland, 35% transshipment
- 35% inland waterway transport
- 11% rail
- 54% road



# Trends and developments

- Growth in volume and terminal capacity (Port Compass 2030 – 475 to 750 mio tons in 2030)
- Increased cooperation/ alliances and integration of services
- Incentives for sustainable transport and more strict emission standards

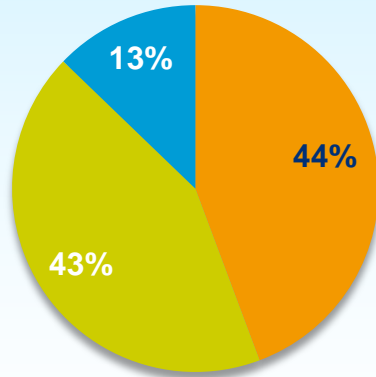


Modal Shift

# Modal Shift Maasvlakte Rotterdam (GE scenario)

2012

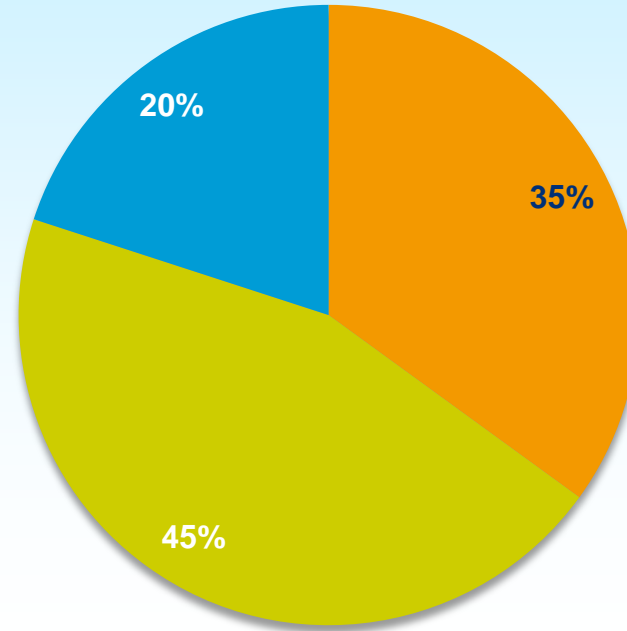
Total 4.8 m TEU



- Road
- Inland shipping
- Rail

2035

Total 17 m TEU



# Changes in modal split containers Maasvlakte

- Road transport's share decreasing
- Inland shipping's share increasing
- **Share of rail is decreasing**



Source: terminals survey

# TEU's grouped by continent in 2012

(transshipment & hinterland)

Rotterdam	Inbound	Outbound	Total	%
Europe	1,974,000	2,006,000	3,980,000	33,5%
Africa	197,000	146,000	343,000	3%
America	1,028,000	777,000	1,805,000	15%
<i>Asia</i>	<i>2,854,000</i>	<i>2,830,000</i>	<i>5,684,000</i>	<i>48%</i>
Oceania	22,000	28,000	50,000	0,5%
<b>Total</b>	<b>6,075,000</b>	<b>5,787,000</b>	<b>11,862,000</b>	<b>100%</b>



# Hinterland Rotterdam

- 5% of road transport is cross-border
- Inland shipping: NL & DE
- Rail: Italy & East Europa



**Main hinterland Rotterdam**

# Frequency rail connections



COUNTRY	WEEKLY FREQUENCY
<b>BENELUX</b>	<b>62</b>
<b>ITALY &amp; FRANCE</b>	<b>159</b>
<b>GERMANY, SWITZERLAND &amp; AUSTRIA</b>	<b>180</b>
<b>EASTERN EUROPE</b>	<b>92</b>
<b>TOTAL</b>	<b>493</b>



# Betuweroute: Key to Europe

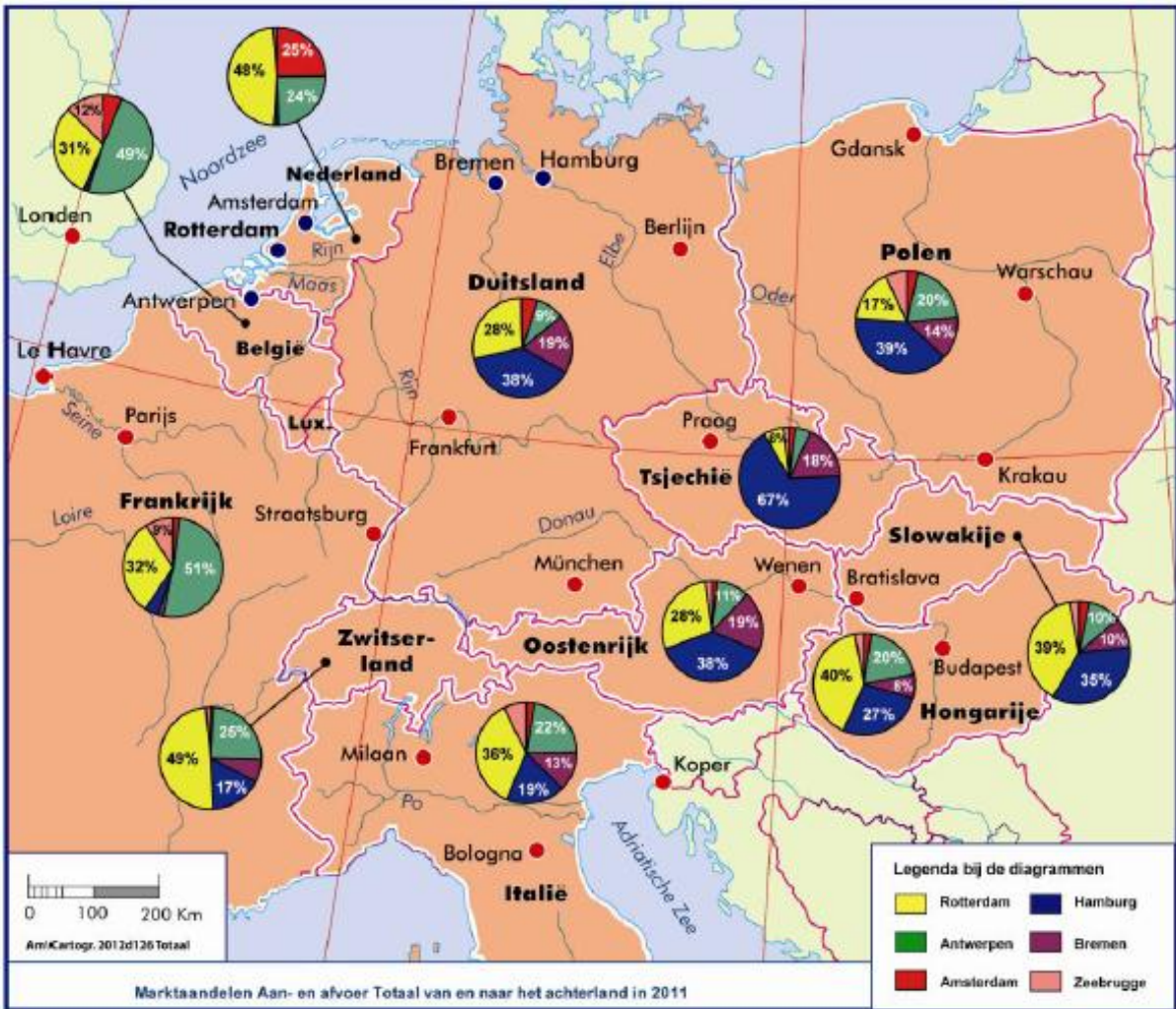


- **Dutch connection: “from sea up to Zevenaar”**
  - A15 track (bundled with the A15 highway)
  - ‘Harbour line’ (rail tracks in the Port of Rotterdam)
  - Including shunting yards and connections to port industries (e.g. container terminals)
- **Amsterdam joins at Geldermalsen**





- Marketshares hinterland Port of Rotterdam 2011 (in & out, all modes of transport)





# Inbound volumes/ top 5 Rotterdam (tons, 2012)

	Country	Total	Barge	Rail	Road
	<b>TOTAL</b>	<b>85,411,000</b>	<b>47,129,000</b>	<b>6,448,000</b>	<b>31,834,000</b>
1	Netherlands	43,210,000	17,977,000	2,482,000	22,752,000
2	Germany	18,546,000	12,593,000	1,528,000	4,426,000
3	Belgium	13,543,000	10,341,000	772,000	2,430,000
4	France	5,233,000	4,404	162,000	667,000
5	Italy	1,168,000	0	1,043,000	125,000

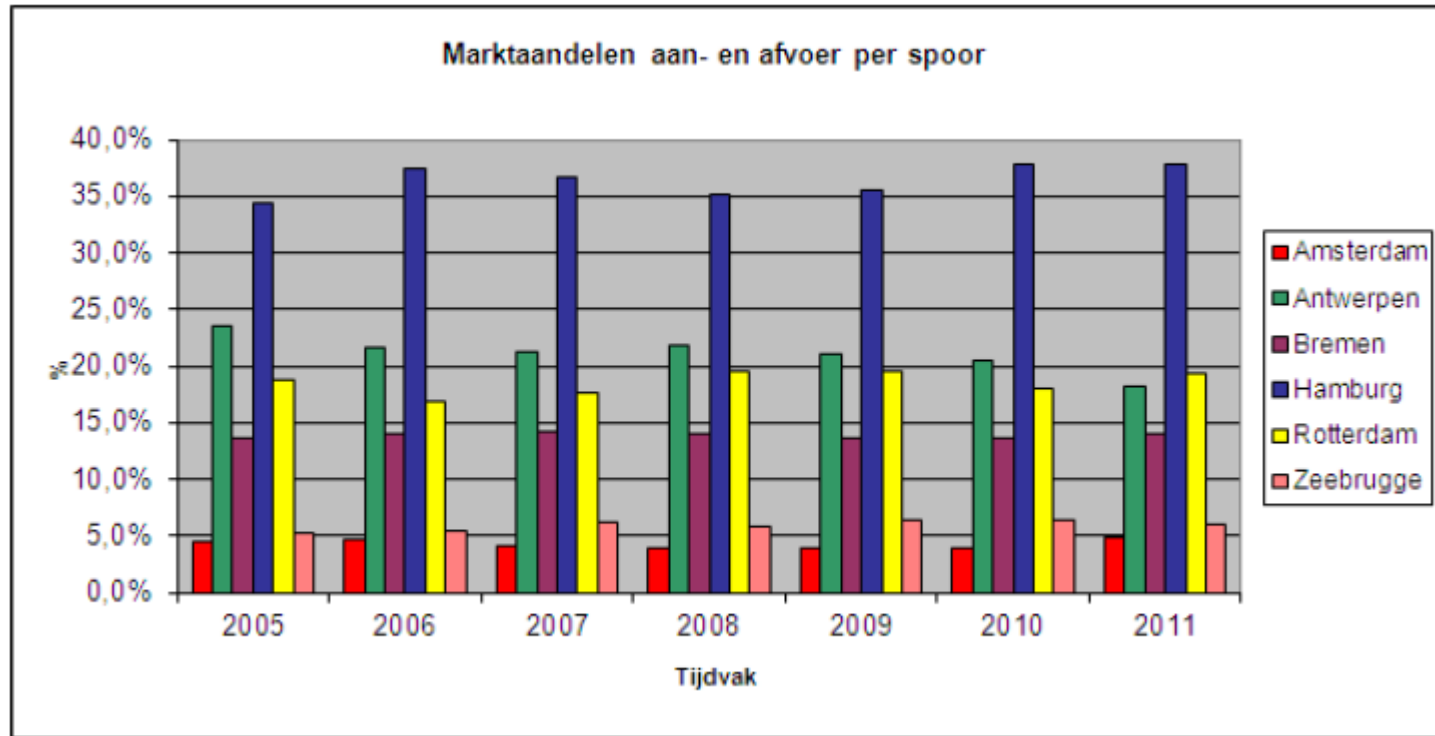
Small volumes from Romania (25.000 Barge, 36.000 Road), Serbia (21.000 Barge)

# Outbound volumes/ top 5 Rotterdam (tons, 2012)

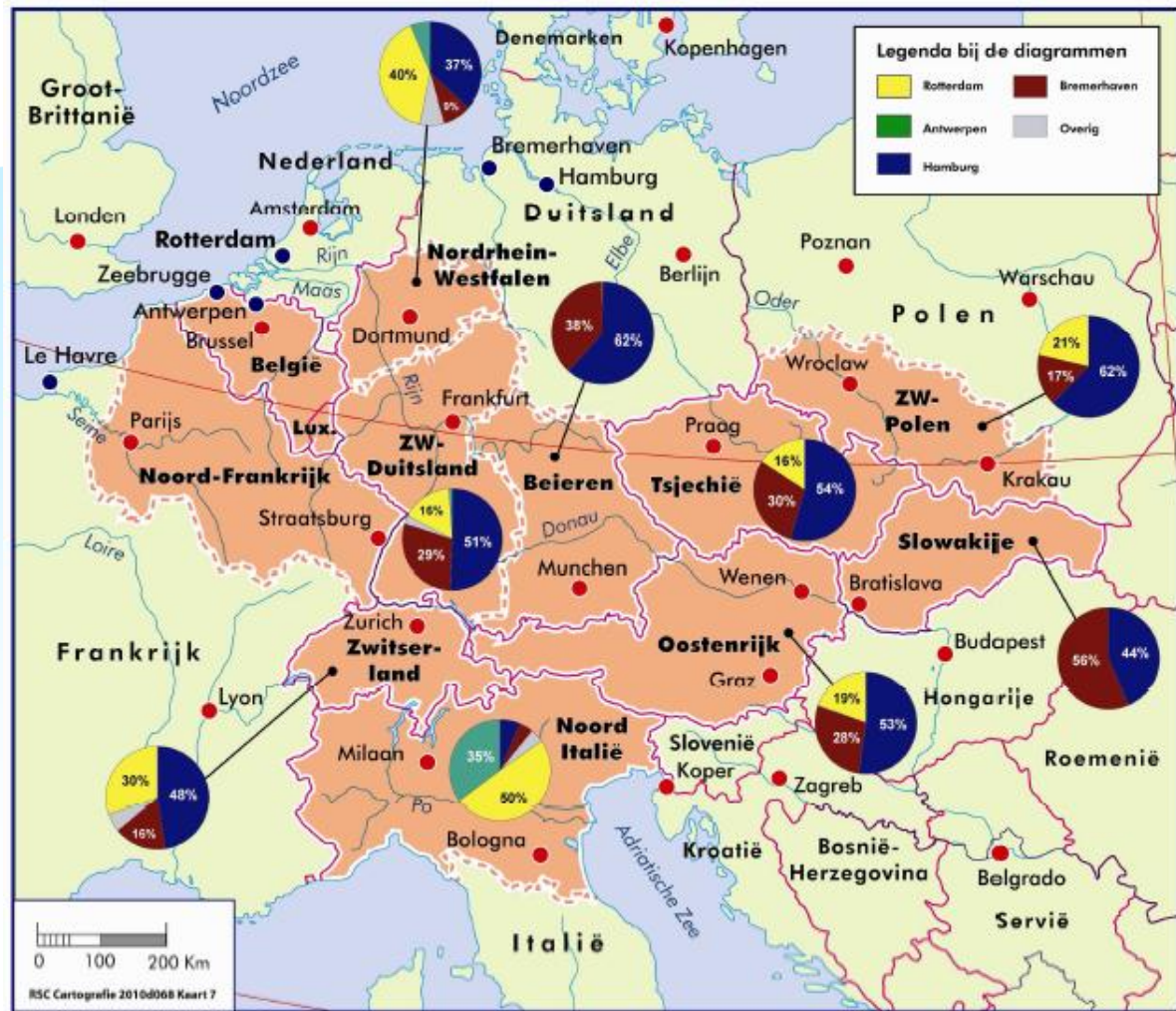
	Country	Total	Barge	Rail	Road
	<b>TOTAL</b>	<b>164,803,000</b>	<b>105,171,000</b>	<b>18,485,000</b>	<b>41,147,000</b>
1	Germany	69,267,000	49,050,000	13,266,000	6,950,000
2	Netherlands	54,388,000	26,009,000	2,231,000	26,148,000
3	Belgium	25,626,000	21,615,000	302,000	3,709,000
4	France	5,658,000	3,799,000	275,000	1,584,000
5	Italy	1,655,000	0	1,428,000	226,000

Small volumes to **Romania** (2.000 Barge, 3.000 Rail, 61.000 Road), **Serbia** (24.000 Barge) and **Ukraine** (22.000 Barge)

# Hamburg le Havre range - marketshares



- Marketshares PoR hinterland on Rail, 2012





# Marketshare & TEU's by rail from Port of Rotterdam

(within, to, from and via Germany)

Italy: 50% = 188.000 TEU

Nordrhein Westfalen: 40% = 131.000 TEU

South-West Germany (Baden-Württemberg, Saarland, Hessen, Rheinland Pfalz): 16% = 100.000 TEU

Switzerland: 30% = 61.000 TEU

Czech Republic: 16% = 58.000 TEU

Austria: 19% = 41.000 TEU

Poland: 21% = 21.000 TEU

South-East Germany (Bavaria): 0% = 1.000 TEU

# InlandLinks: best practice

- Online intermodal platform started in 2011 by PoR and VITO to stimulate and use intermodal transport
- Possibilities of information on the website:
  - Search for inland terminals with connection to Rotterdam;
  - Find an intermodal route between inland location and Rotterdam;
  - Find which shipping lines have empty containers available
- **Facts & figures:**
  - Members: > 65 terminals in Europe & > 12 shipping lines;
  - > 5.000 monthly visitors on the website.

**INLAND LINKS**

TERMINALS CONTAINER DEPOTS ROUTE PLANNER ABOUT INLANDLINKS REGISTER TERMINAL NEWS CONTACT

## THE SMART WAY TO CONNECT

INLANDLINKS charts Rotterdam's hinterland network and provides an overview of the most efficient intermodal routes. You can now also find out where empty containers are being taken or can be collected.

REGISTER TERMINAL WATCH THE VIDEO

**LATEST NEWS** KEEP ME UP TO DATE

- 05 Valenciennes first Australian terminal to join InlandLinks
- 27 Advisory Board introduced
- 23 Final sprint for InlandLinks

**TWITTER** FOLLOW US ON TWITTER

RT @FishHolland: De 18e Hollandse vrachtwagen staat base om te stappen [#VRACHTWAGEN](#)

**SEARCH FOR A TERMINAL** VIEW ALL TERMINALS

Location:

Radius: 25 km

**SEARCH A CONTAINER DEPOT** SHOW ALL

Location:

Radius: 25 km

Shipping line(s):  Select shipping lines @Selectd

Equipment:  Pick-up  Drop-off  Coaches  P&U-Set

**PLAN A ROUTE**

**FROM LOCATION OR TERMINAL**

From:

Terminal:  Select a terminal...

Date: 05/04/2014

**TO LOCATION OR TERMINAL**

To: Rotterdam

Terminal:  Select a terminal...

Departure date:  Arrival date:

**FIND A TERMINAL ON THE MAP**

[www.inlandlinks.eu](http://www.inlandlinks.eu)

### ROUTE 1



Wiencont Container Terminal  
28-5-2014



Train  
1210km



Rail Service Center  
2-6-2014

CO<sub>2</sub> besparing 569kg    Truckafstandbesparing 1178km    Transitijd train: 98 uur

### ROUTE 2



Wiencont Container Terminal  
30-5-2014



Train  
1210km



Rail Service Center  
4-6-2014

CO<sub>2</sub> besparing 569kg    Truckafstandbesparing 1178km    Transitijd train: 96 uur

### ROUTE 3



Wiencont Container Terminal  
3-6-2014

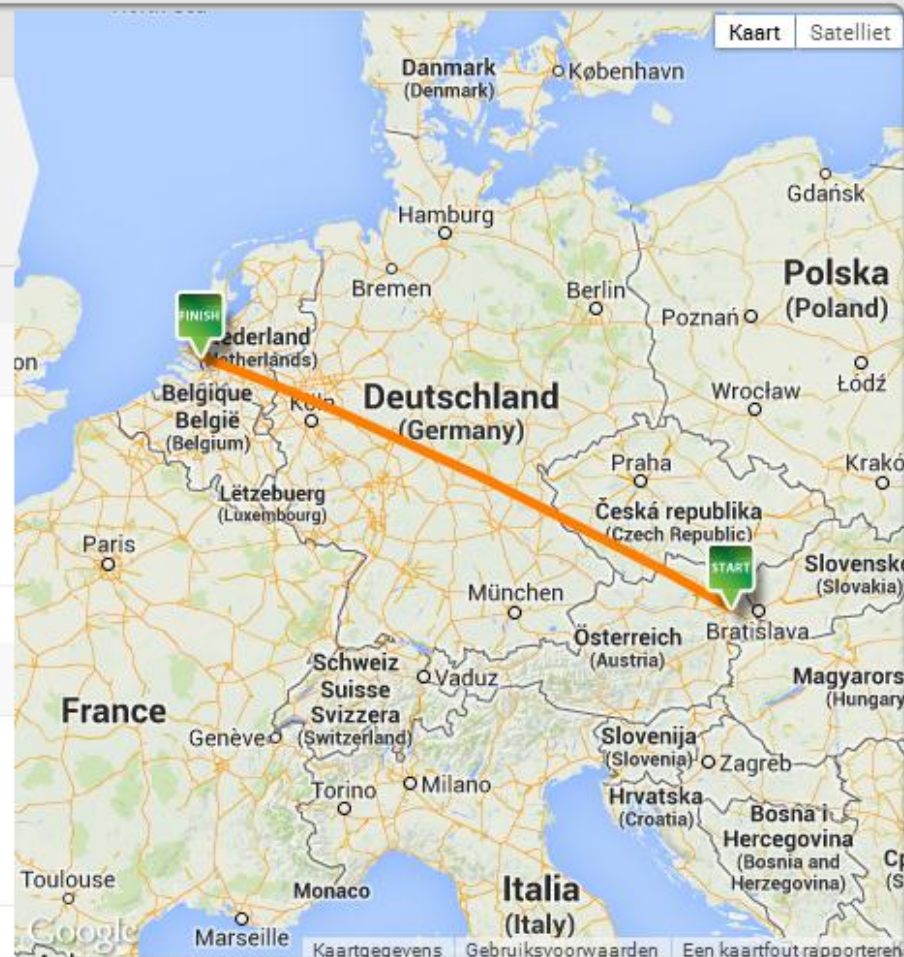


Train  
1210km



Rail Service Center  
5-6-2014

CO<sub>2</sub> besparing 569kg    Truckafstandbesparing 1178km    Transitijd train: 46 uur



# Euro- Asia transport PoR view

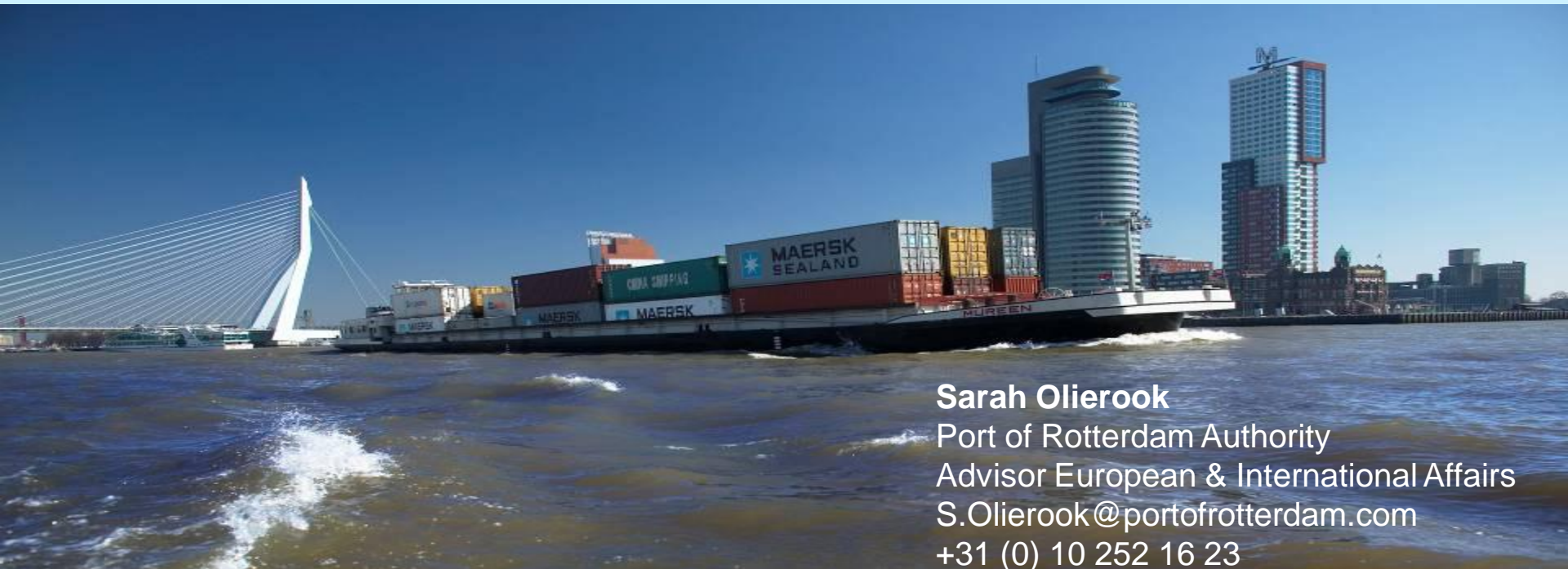


- New Silkroute 11.000 km of rail China-Germany
- Follow developments with great interest (TRWC)
- Mainly competing with air transport (high value, time-sensitive commodities)
- Interesting for a niche market (small volume, goods that are not sensitive to temperature changes)
- How ensure return cargoes?
- Chong Qing office in Rotterdam





# Thank you!



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