Oliver Sonnet,
duisport Group:
duisport – More than a port

Business Strategies
Some facts about duisport …

- **The world’s largest inland port:**
  - Approximately 110 million tonnes are transshipped in the public ports and the 7 private ports p.a.

- **The world’s largest inland container port:**
  - Transshipment of 900,000 TEU in 2007

- **The leading hinterland hub of the Northern EU sea ports:**
  - Network of more than 350 container shuttles per week

- **One of the leading logistics locations in Europe:**
  - logport project with 50 new logistics investments from a dozen nationalities within the last years

- **The most important economic factor in the region:**
  - Over 36,000 jobs depend on the Port of Duisburg
Duisburg Location …

… in the Heart of Europe

- Situated in Europe’s largest industrial conurbation with more than 30 million consumers and 300,000 companies in a radius of 150 km

- Located at the junction of major European water, rail and road transportation routes

- Major hinterland hub for gateway cargo from and to the North Sea ports

> The EU enlargement makes Germany the geographical center of the world’s largest free trade area
Duisburger Hafen AG

- Owner and managing company of the public parts of the Port of Duisburg

- Shareholders (1/3 each):
  - Federal Republic of Germany
  - State of North Rhine-Westphalia
  - City of Duisburg

- Revenues:
  - duisport Group: 126.8 million Euros

- Employees:
  - duisport Group: 550

- Network:
  - 250 companies specialized in transportation and logistics
duisport Group – Structure

Infrastructure and Suprastructure Providers:
• Duisburger Hafen AG
• Logport Logistic-Center Duisburg GmbH

Logistics Service Providers:
• duisport agency GmbH
• duisport facility logistics GmbH
• duisport rail GmbH

Packing Logistics:
• VTS GmbH
• VTS Chemnitz GmbH
• VTS International N.V.

Participations:
• DIT GmbH
• Antwerp Gateway N.V.
• D3T GmbH
• Masslog GmbH
• UTM GmbH & Co. KG

> Excellent logistics services to the benefit of our clients
Participations
Examples: AGT and D3T

- **Antwerp Gateway Terminal:**
  - Capacity of 3.5 million TEU for sea-going vessels
  - Set up of block trains and dedicated barge shuttles to the hinterland
  - Shareholders: DP World, COSCO, ZIM, CMA CGM and duisport

- **Duisburg Trimodal Terminal:**
  - Shareholders: CMA CGM, NYK and duisport
  - First dedicated shipping line container terminal in the European hinterland (B/L Duisburg)
  - CMA CGM and NYK are consolidating their gateway cargo in Duisburg
Professional Settlement Management

- 50 companies have settled on 300 hectares during the last 7 years

Kühne+Nagel

E.H. Harms/ BLG

Tower Automotive

- winning investors for location duisport / logport
- project management
- eco management
- personnel recruitment
- logistics and transportation services
- facility management services

> Reason why? – Intermodal network
End of 1998: Development of the former Krupp steel mill (265 hectares site) into one of the leading cargo transfer and logistics centers in the center of Europe

Focus on trimodal transportation with excellent access to waterway, railroad and highway systems

Creation and Europe-wide marketing of the brand “logport“

Investment of more than 500 million Euros by duisport Group and its clients

Beginning of 2006: Sequel of logport success story with logport II: Development of a former zinc factory site into a trimodal logistics center
logport I: Multimodal Logistics Center

Shunting yard

DIT / D3T

Roll-on/roll-off

PDI center

> One of the leading logistics centers in Europe
logport II: Status Quo

Extension of the “logport-family“:

- duisport Group has owned the former MHD-Sudamin premises since February 2006
- Options have already been agreed for all logport II tracts
- Tract development has been completed in just under two years
- New transportation infrastructure and the quay wall will be ready for operation by the end of 2008
- The project is supported by EU funding from the Traget-2 program

> logport II benefits from the excellent standing of its big brother
...onto a whole Region: „logport-Ruhr“ is born

- logport-Ruhr is a Joint Venture between Duisburger Hafen AG and RAG Montan Immobilien GmbH
- Development of further logistics centres
- Goal: Value added and generating jobs within the Ruhr-region
- Points of quality: at least bimodal connection and Integration in duisport’s international logistics network
- Multimodal solutions for producers and commercial enterprises
- Preparation/marketing of logistics areas with best preconditions
> Establishing the 1st regional Hinterland-Hub-and-Spoke-system worldwide within Europe’s largest industrial conurbation
Strategic Investments of Global Player – so far

NYK Logistics & Megacarrier
50,000 m²

Rhenus Logistics
40,000 m²

Schenker Logistics
20,000 m²

Wincanton
30,000 m²

Geodis
25,000 m²

DHL
50,000 m²

Kuehne + Nagel
120,000 m²

Imperial
40,000 m²
Cargo Streams generate Added Value

- Development of container throughput 1999-2007:

<table>
<thead>
<tr>
<th>Port</th>
<th>1999</th>
<th>2007</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rotterdam</td>
<td>1.5</td>
<td>1.9</td>
<td>+ 70%</td>
</tr>
<tr>
<td>Antwerp</td>
<td>4.0</td>
<td>4.8</td>
<td>+ 120%</td>
</tr>
<tr>
<td>Hamburg</td>
<td>2.5</td>
<td>3.3</td>
<td>+ 160%</td>
</tr>
<tr>
<td>Bremen</td>
<td>1.0</td>
<td>1.2</td>
<td>+ 120%</td>
</tr>
<tr>
<td>Duisport</td>
<td>0.3</td>
<td>1.5</td>
<td>+ 330%</td>
</tr>
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- Development of warehouses 1999-2007 (in million sq. m):

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<td>0.3</td>
<td>1.5</td>
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- Reasons for the growth of Duisport:
  - Investment program of 1.5 billion Euros by Duisport and its clients
  - Settlement of more than 50 logistics companies with strategic investments
  - Development of own rail tracks from 100 to 200 kilometers and feeder shuttles by rail

> Duisport is one of the fastest growing logistics turntables in Europe
duisport – More than a port

Intermodal Solutions

IHEDATE Seminar

Paris, 16th October 2008
Doubling of container throughput capacities in the North Range until 2015

German North Sea ports 2015:
30 million TEU
Hinterland traffic: 12 million TEU
Benelux seaports 2015:
45 million TEU
Hinterland traffic: 32 million TEU

> Germany and Central Europe are served to 60% by the ARA-Range

Source: Study of German Ministry of Transport

Source: Ports data

>
Problems caused by Congestion at the Sea Ports

- Congestion and lack of space threaten growth rate and progress in hinterland transportation
- Infrastructure expansion projects like Maasvlakte II or JadeWeserPort only offer long-term solutions
- Strategies to solve the problems:
  - Sea ports focus on their core business: container loading and unloading operations
  - Containers are directly moved to hinterland hubs by rail or barge
  - Sorting, bundling and distribution of containers at hinterland hubs
  - Logistics services can be provided in the hinterland, e.g. warehousing, commissioning, labeling

> Cooperations between sea ports and hinterland hubs are essential
What Hinterland Hubs need

- **Strategic position in Europe’s hinterland:**
  - Close to the production sites
  - Close to the consumer
  - Along the main transport corridors

- **Excellent trimodal infrastructure**
  - Specific advantages of each mode can be used

- **Function of nodal points in intermodal and logistic networks**

- **Consolidation point for cargo streams**
  - Combining continental and maritime cargo
  - Generating new cargo flows

> duisport has all prerequisites a hinterland Hub needs
duisport is preparing for further growth in combined transport

Service Facilities:
- 200 km of rail tracks and 4 shunting yards
- 5 intermodal container terminals
- Capacity today: 1.4 million TEU

Further Development:
- duisport is investing > 500 million Euros (2000-2010), especially in railroad and container terminal infrastructure
- By 2012 duisport will have more than 80 hectares of container storage area on offer

> duisport is preparing for further growth in combined transport
Five Container Terminals

Terminals are connected...

...by a daily duisport rail shuttle

> Enlargement to 2.5 million TEU p.a. until 2012
duisport as leading gateway hub in the hinterland

- 55 rail shuttles per week to the Benelux seaports:
  - 40 x Rotterdam
  - 5 x Antwerp
  - 5 x Zeebrugge
  - 5 x Amsterdam

- 35 rail shuttles per week to the Northern German seaports:
  - 10 x Hamburg
  - 5 x Bremen/Bremerhaven
  - 10 x Lübeck
  - 5 x Rostock
  - 5 x Kiel

- Additional: 21 barge shuttles per week to the Benelux seaports

> Barge or rail – duisport’s customers have both alternatives at one location
Network to the European Hinterland

- Turntable and hub function: duisport bundles maritime and continental cargo streams between the North Range and the hinterland

  - Excellent Combined Transport Network:
    - More than 350 scheduled combined transportation train links per week to over 80 destinations in the European hinterland
    - 25 railroad companies offering transportation services at Duisburg
    - Further extension of duisport’s combined transportation network with more than 400 train links in 2008

> Further extension of the duisport network
Scheduled Short Sea shipping links mainly to the United Kingdom, Scandinavia and the Iberian peninsula.

Some 2 million tonnes of cargo loaded and unloaded by approx. 2,000 sea-going barges in Duisburg p.a.

55,000 TEU p.a. by direct container line service to the United Kingdom (London area)

10 Short Sea shipping companies operate liner services from Duisburg.

”Top 5“-Relations:
- UK (Tilbury, Goole)
- Norway (Bergen)
- Spain (Barcelona)
- Denmark (Kolding)
- Lithuania (Klaipeda)
Total transshipment of the public ports (duisport) and 7 private ports:
Approx. 110 million tonnes p.a., thereof duisport 55 million tonnes:

<table>
<thead>
<tr>
<th>duisport transshipment:</th>
<th>1999</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ship cargo</td>
<td>14.0</td>
<td>16.0</td>
</tr>
<tr>
<td>Rail cargo</td>
<td>6.1</td>
<td>12.6</td>
</tr>
<tr>
<td>Intermediate result</td>
<td>20.1</td>
<td>28.6</td>
</tr>
<tr>
<td>Truck cargo</td>
<td>17.0</td>
<td>26.5</td>
</tr>
<tr>
<td>Total cargo</td>
<td>37.1</td>
<td>55.1</td>
</tr>
</tbody>
</table>

Major hub for containers, coal and steel in the hinterland of the sea ports

51% Breakbulk and containerized cargo
Development of Container Transshipment

> duisport: The biggest hinterland container port in the world
duisport: Rail Transshipment

> Potential to double the volumes of today until 2015

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume (million tonnes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2001</td>
<td>6.4</td>
</tr>
<tr>
<td>2003</td>
<td>7.5</td>
</tr>
<tr>
<td>2005</td>
<td>8.9</td>
</tr>
<tr>
<td>2007</td>
<td>12.6</td>
</tr>
<tr>
<td>2008</td>
<td>14.0 (projected)</td>
</tr>
<tr>
<td>2015</td>
<td>28.0 (projected)</td>
</tr>
</tbody>
</table>
Gateway System for the Seaports
Example: DB Intermodal

Installation of a strategic gateway terminal in Duisburg by the DB Group:

- Advantages for the seaport terminals:
  - Quick transportation of the containers out of the seaports into the hinterland
  - Short-term release of the congested seaports
  - Turntable optimizes the connection of the smaller ports and nearby locations
  - New offer for shippers and carriers

Source: DB Intermodal
Regional Feeder Shuttle Network

- **duisport Group offers industry solutions to major production and trading companies in North Rhine-Westphalia**
  
  - Daily railroad shuttles by duisport rail to/from different container terminals in the Rhine-Ruhr region (e.g. Marl, Unna, Krefeld-Uerdingen, Dormagen)
  
  - Feeding of the continental cargo into the combined transportation network of duisport clients
  
  - Combination of continental and maritime cargo in existing rail shuttle systems

> **Shifting more than 60,000 containers p.a. from road to rail**
**Hinterland Shuttles (1)**

Case: Zeebrugge

- **Duisburg-Zeebrugge-Shuttle**
  - Block train five times per week
  - Zeebrugge train is the first direct rail link to the Belgian sea coast from Duisburg
  - In Zeebrugge: direct cargo transfer to the APMT and CHZ
  - In Duisburg: direct cargo transfer to the Vienna-Budapest shuttle
  - Further distribution via duisport's international combined transport network at DUSS-Terminal
Hinterland Shuttles (2)
Example: Rotterdam

- Duisburg-Rotterdam v.v. block train services

  - 1999: 3 shuttles per week
  - 2007: Opening of Betuwelijn
  - 2008: 40 shuttles per week
  - 2010: 75 shuttles per week

  - Further transportation via gateway Duisburg to Central Europe

- On top: 14 barge shuttles per week to Rotterdam

> Rotterdam is targeting 20% of hinterland cargo by rail for 2020
New Rail Service
Example: EWS

- **Start of intermodal rail services from UK into mainland Europe via the Channel Tunnel:**
  - Block train service six times a week between DIT Duisburg Intermodal Terminal and Manchester's Trafford Park Cargo Terminal
  - Start: February 2008
  - Target 1: 10,000 trucks less on UK roads p.a.
  - Target 2: To double rail freight going via the Channel Tunnel up to 2 million tonnes by the end of 2008
  - Cargo: Containers, trailers and swap bodies
Best Practice EDC (1):
NYK

- One of the first clients on the logport site
- German headquarters of NYK Logistics
- Total warehouse area at logport: 45,000 sq.m
- Import, storage and pan-European distribution for several high-tech electronic companies, e.g. Pioneer, Hitachi and Mitsubishi Electric
- EDC of Kanebo International Cosmetics
The French logistics company Geodis operates the EDC for the Japanese cosmetics brand Shiseido in the Port of Duisburg.

- Import of Shiseido products from different factories worldwide to duisport, commissioning, labeling and direct distribution to more than 4,000 branch offices in 20 European countries.

- Total warehouse capacity at duisport: 20,000 sq.m.
Thank you very much for your attention!

More information: www.duisport.com