

# **Opportunities for the railway business environment in the Danube region**

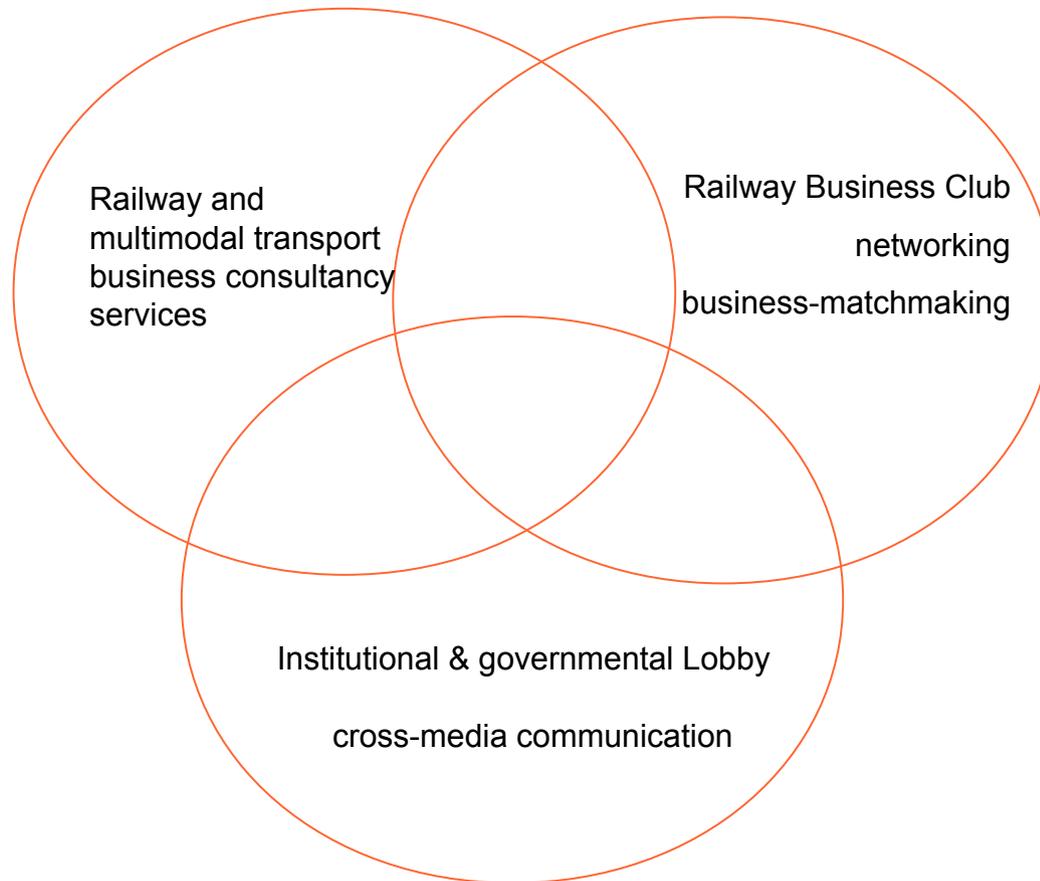
**Ștefan Roșeanu, Club Feroviar**

**The Danube Region Transport Days 2013, Belgrade**

## Agenda

About Club Feroviar  
The Wider Black Sea Area  
Trade & transport aspects  
Container transport EU – Asia  
Danube Region transport figures  
Romania's intermodal strategy

# 1. About Club Feroviar



Member of:

ROMANIAN  
RAILWAY INDUSTRY  
ASSOCIATION

member  
**unife**  
THE EUROPEAN RAIL INDUSTRY



Club Feroviar  
October 3, 2013, Belgrade

# 1. About Club Feroviar



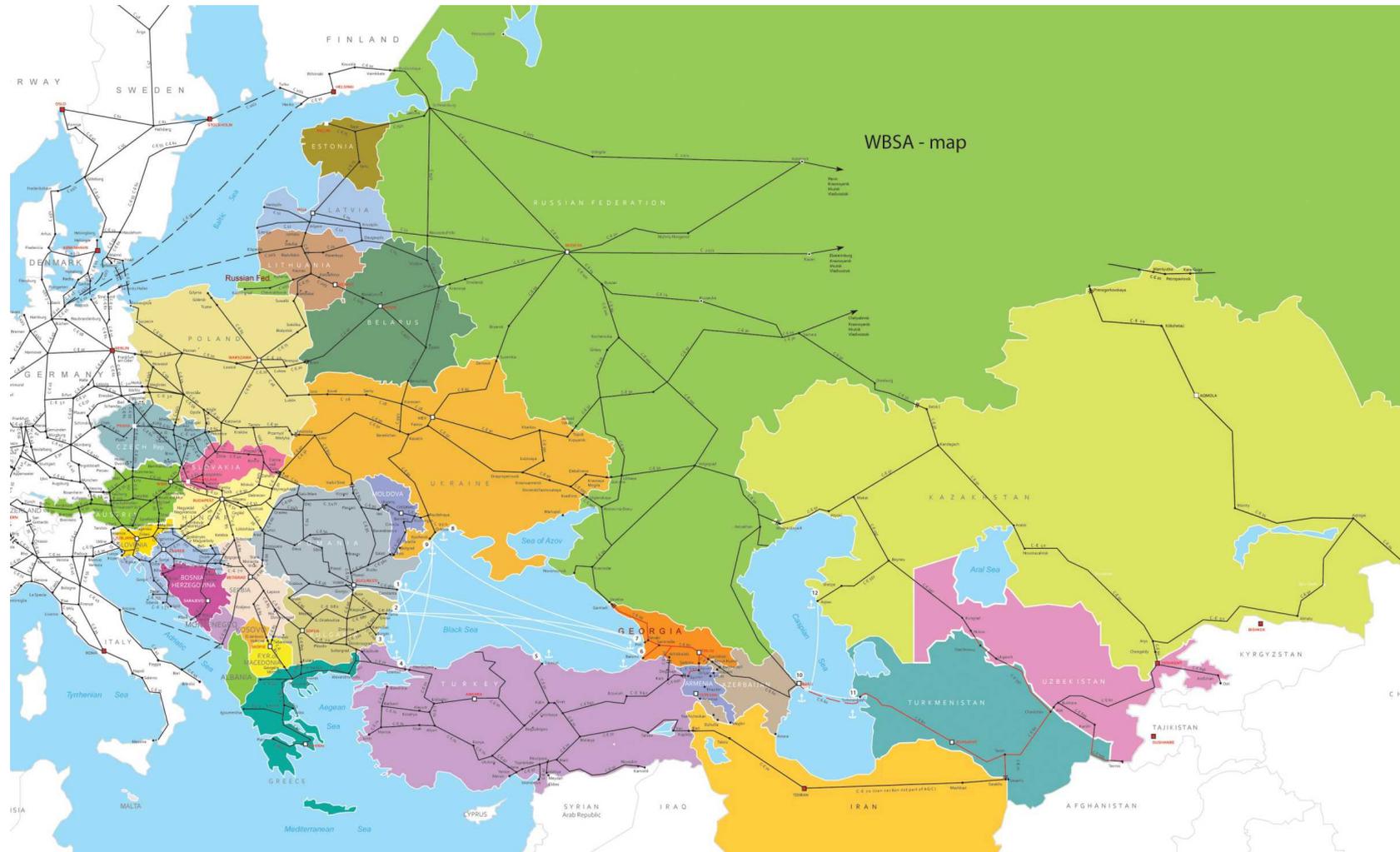
## Objective:

The development of strong, competitive, integrated

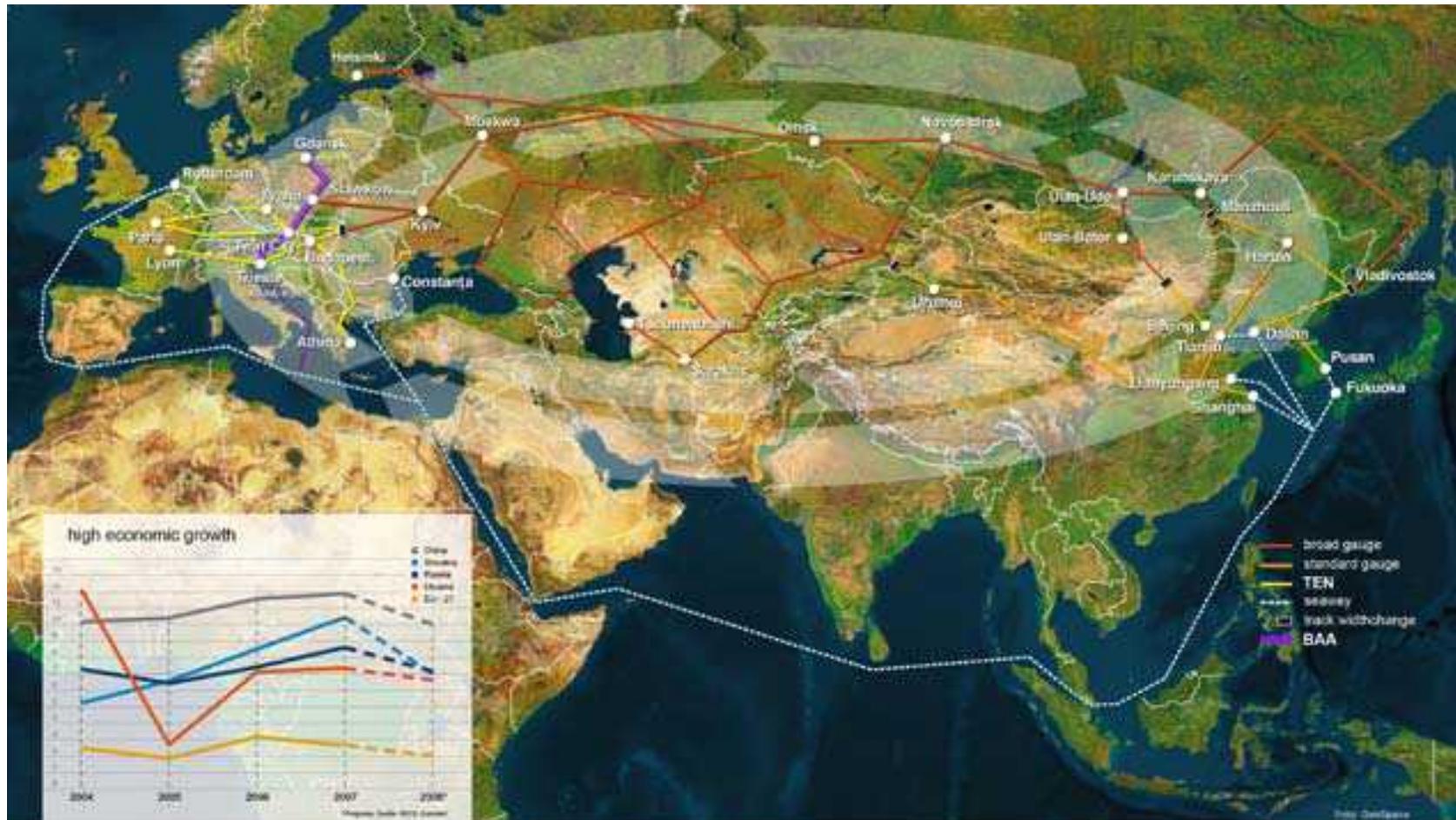
regional and Eurasian

RAILWAY BUSINESS ENVIRONMENT

## 2. Wider Black Sea Area



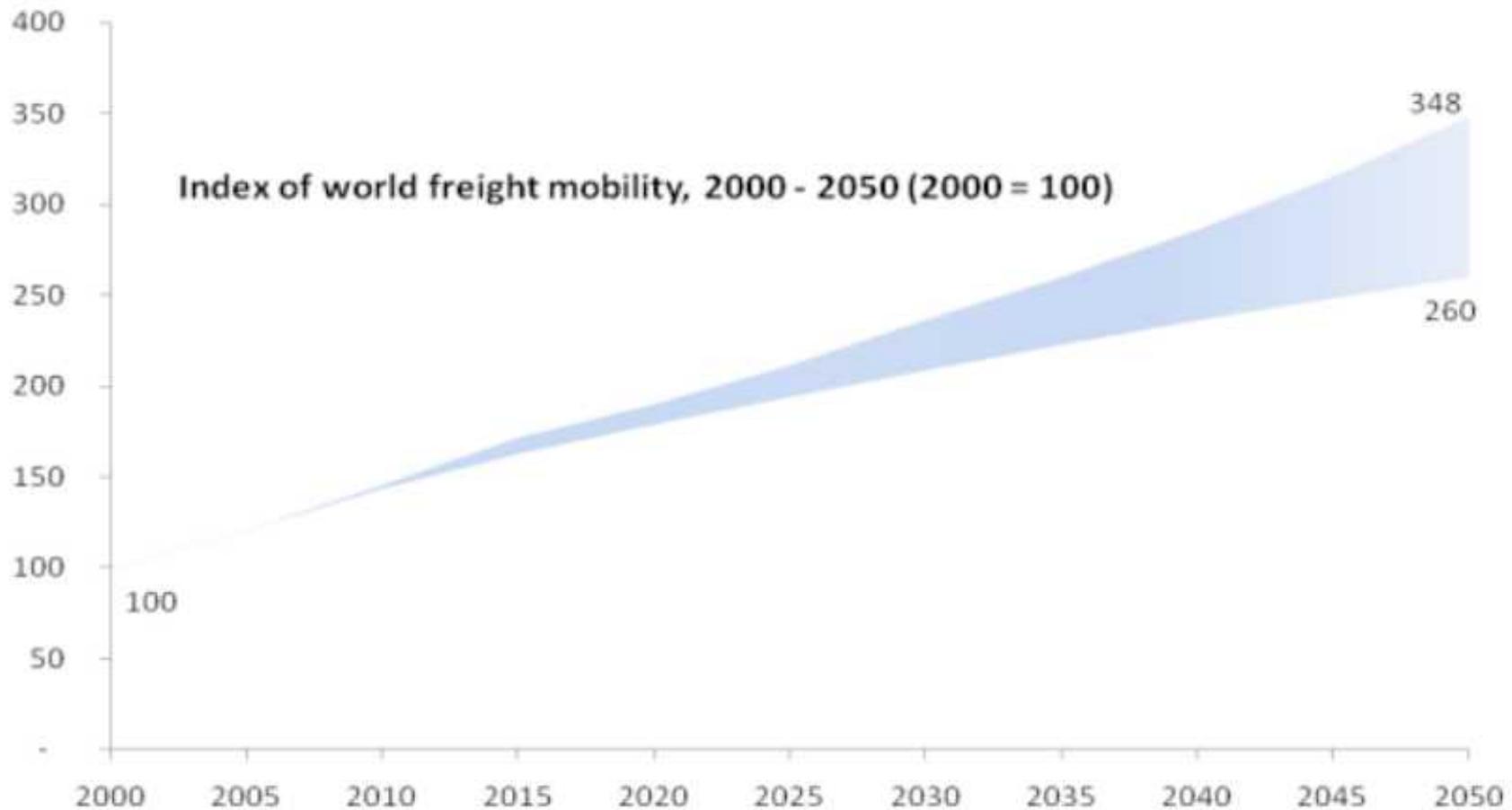
## 3. Trade & transport trends



**Main Eur-Asian trade routes by land and sea**

Source BMVIT\_Study of the Baltic-Adriatic Axis

## 3. Trade & transport trends

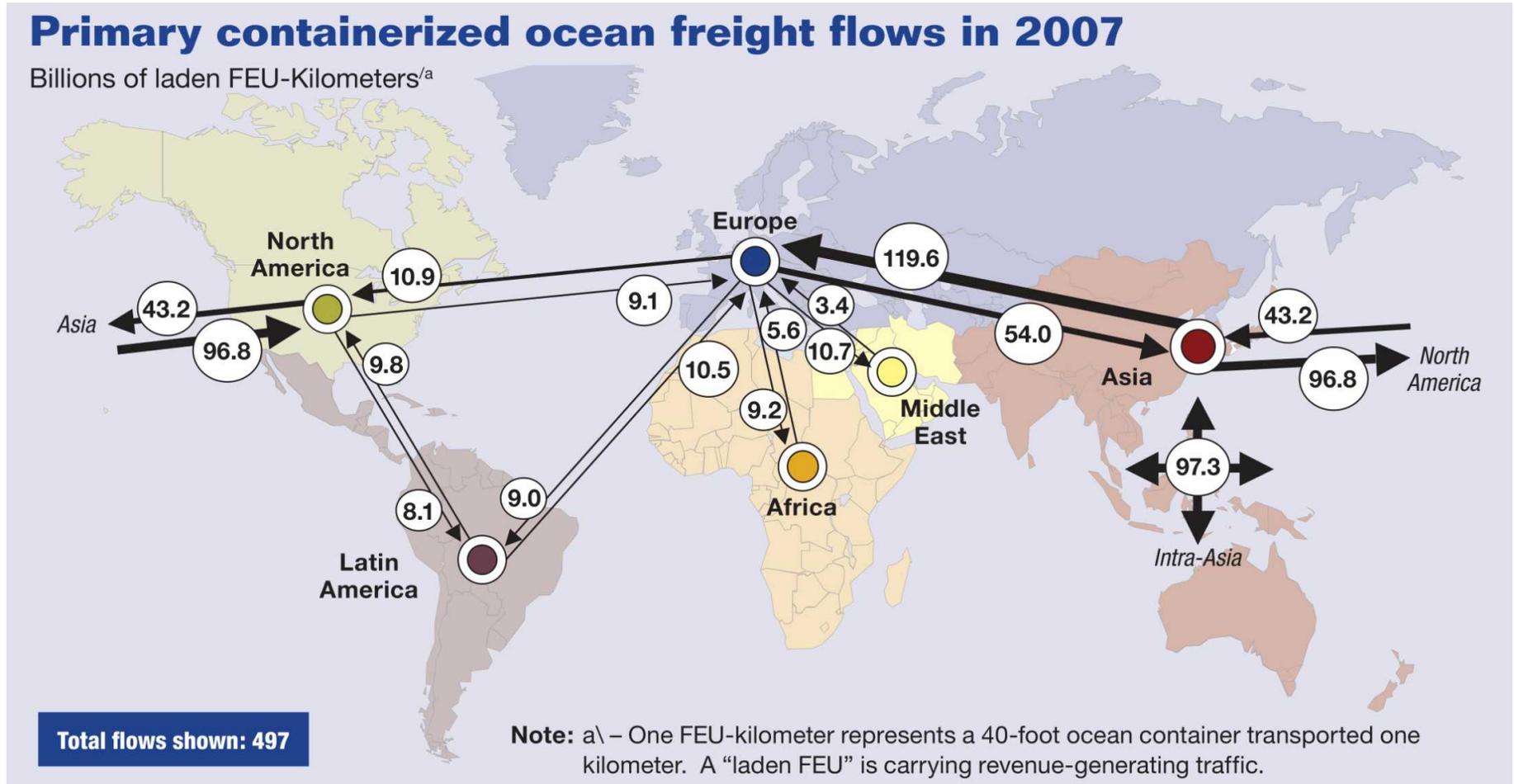


**Index of global freight transport activity, 2000 - 2050,  
index of tkm (2000 = 100)**

Source International Transport Forum, calculations using MoMo version 2011

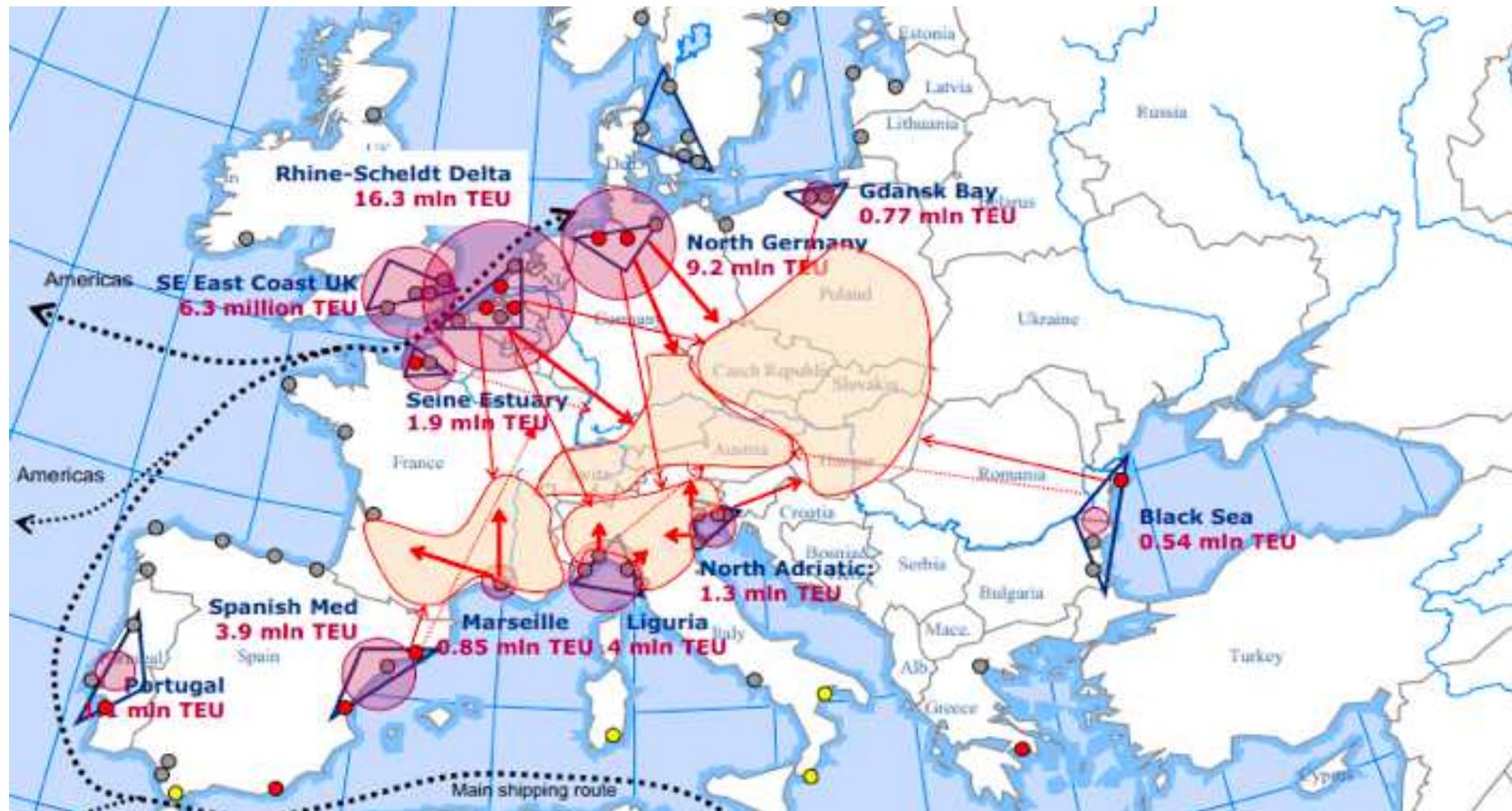
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### 3. Trade & transport trends



Source: MergeGlobal Value Creation Initiative, *Insomnia. Why challenges facing the world container shipping industry make for more nightmares than it should*, American Shipper, 2008

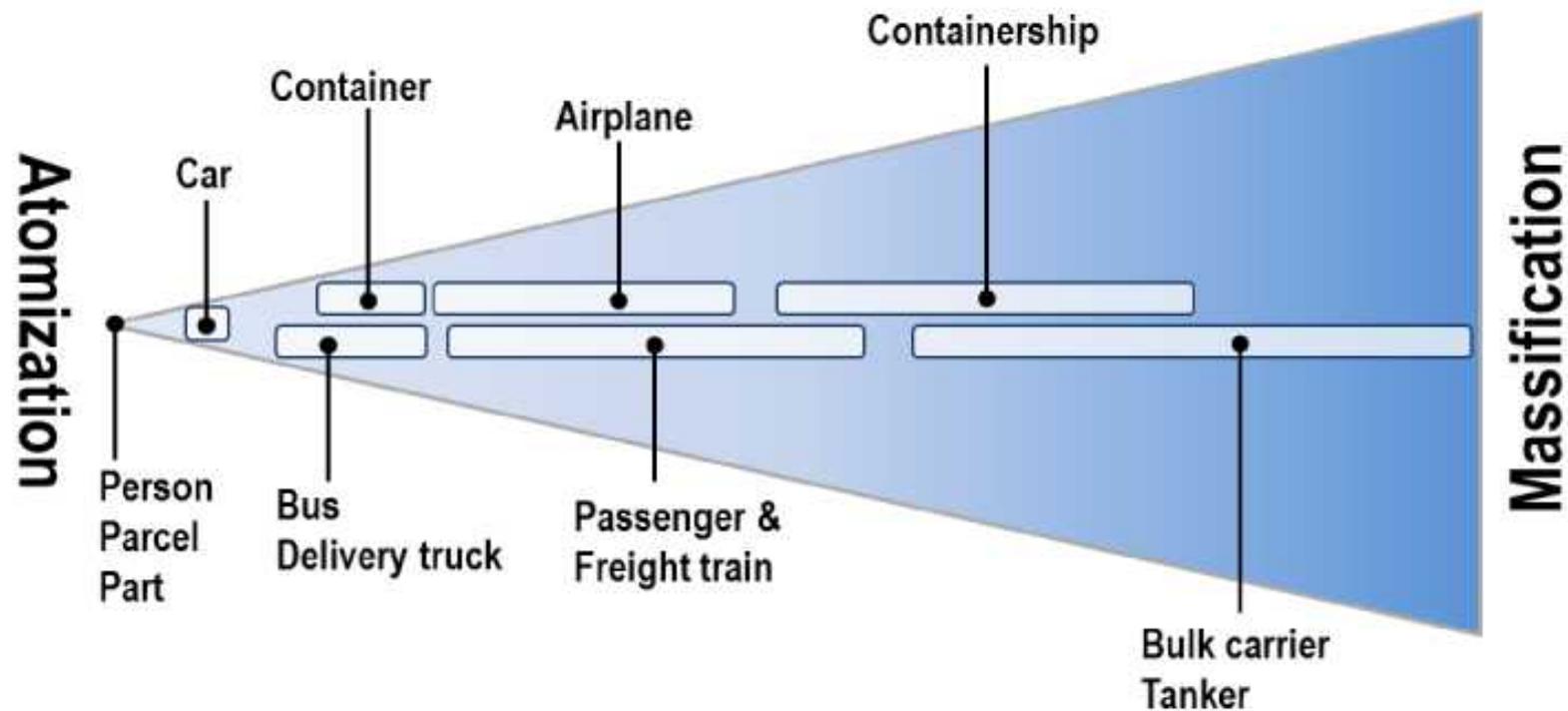
## 3. Trade & transport trends



**The largest share of container traffic towards Danube Region flows through the Atlantic and North Sea Ports**

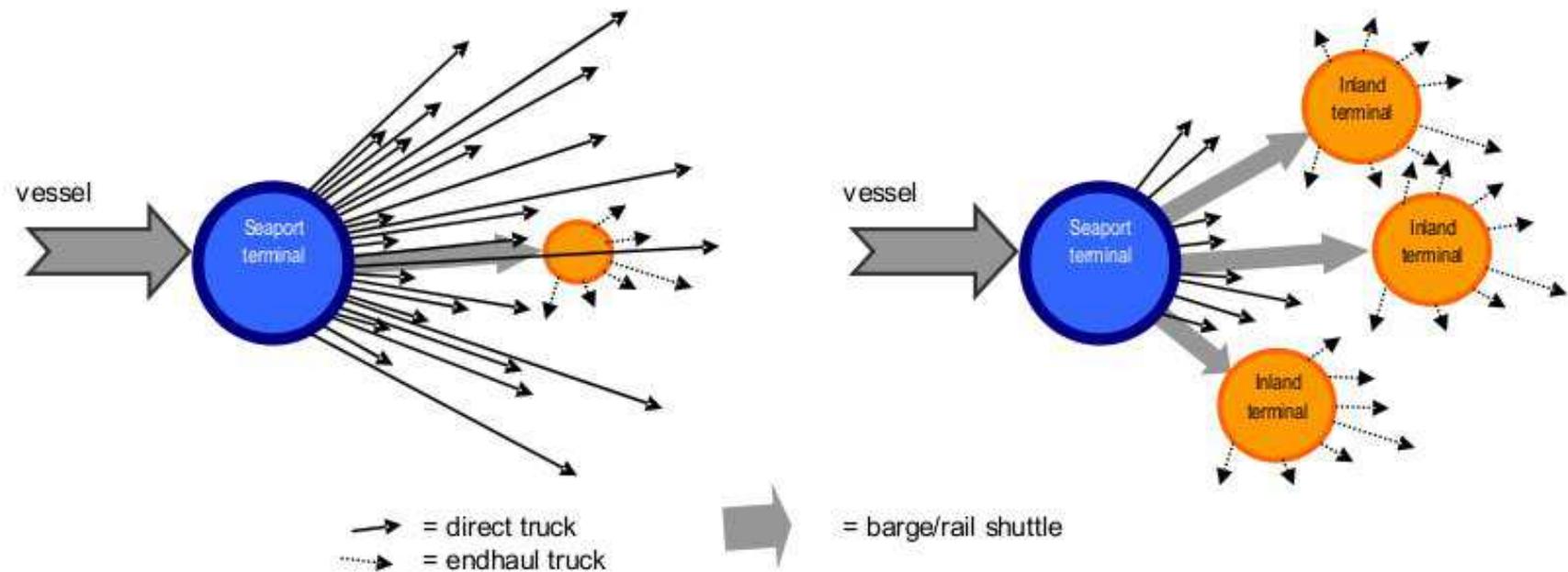
Source: Prof. dr. Theo Notteboom, *Dynamics in port competition in Europe: implications for North Italian ports*, Workshop 'I porti del Nord', Milano, April 2012

## 4. Container transport EU – Asia



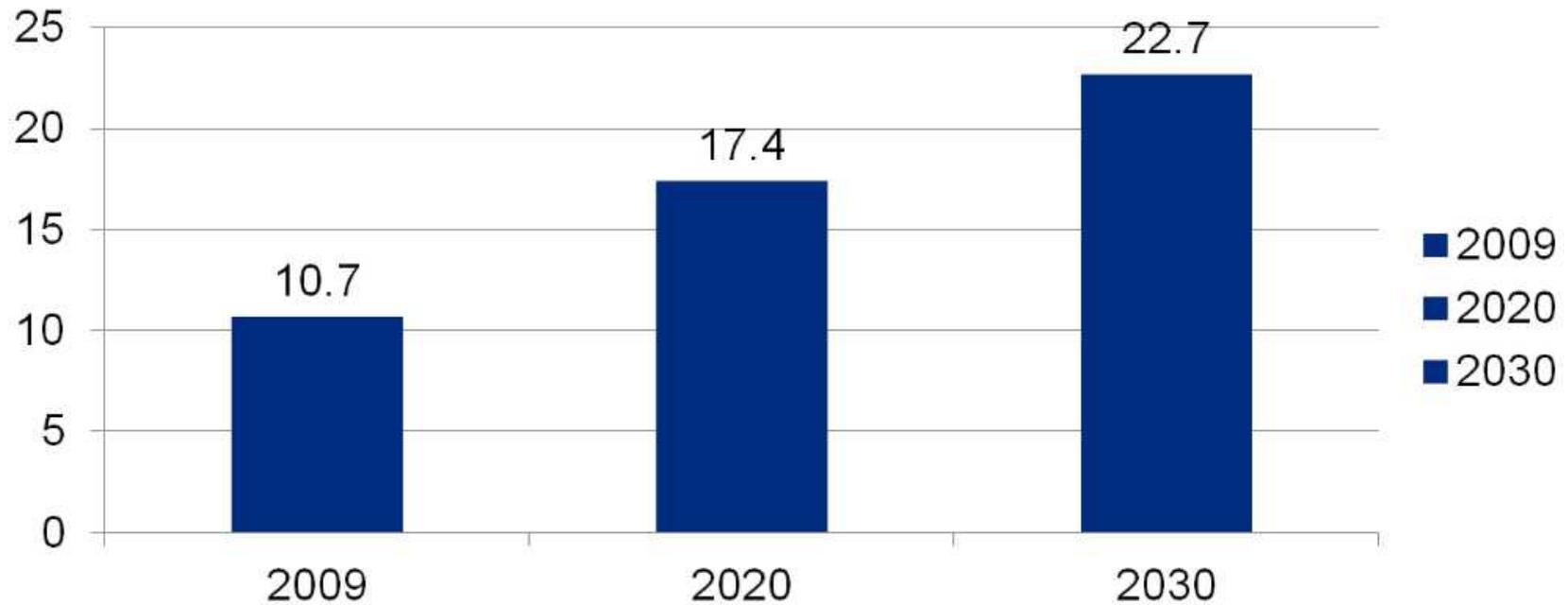
Source: Rodrigue, J-P *et al.* (2009), *The Geography of Transport Systems*, Hofstra University, Department of Global Studies & Geography, <http://people.hofstra.edu/geotrans>.

## 4. Container transport EU – Asia



Source: Prof. dr. Theo Notteboom, *The Future of Rail Freight in Europe*, Rail Freight Conference, Anwerp, February 2010

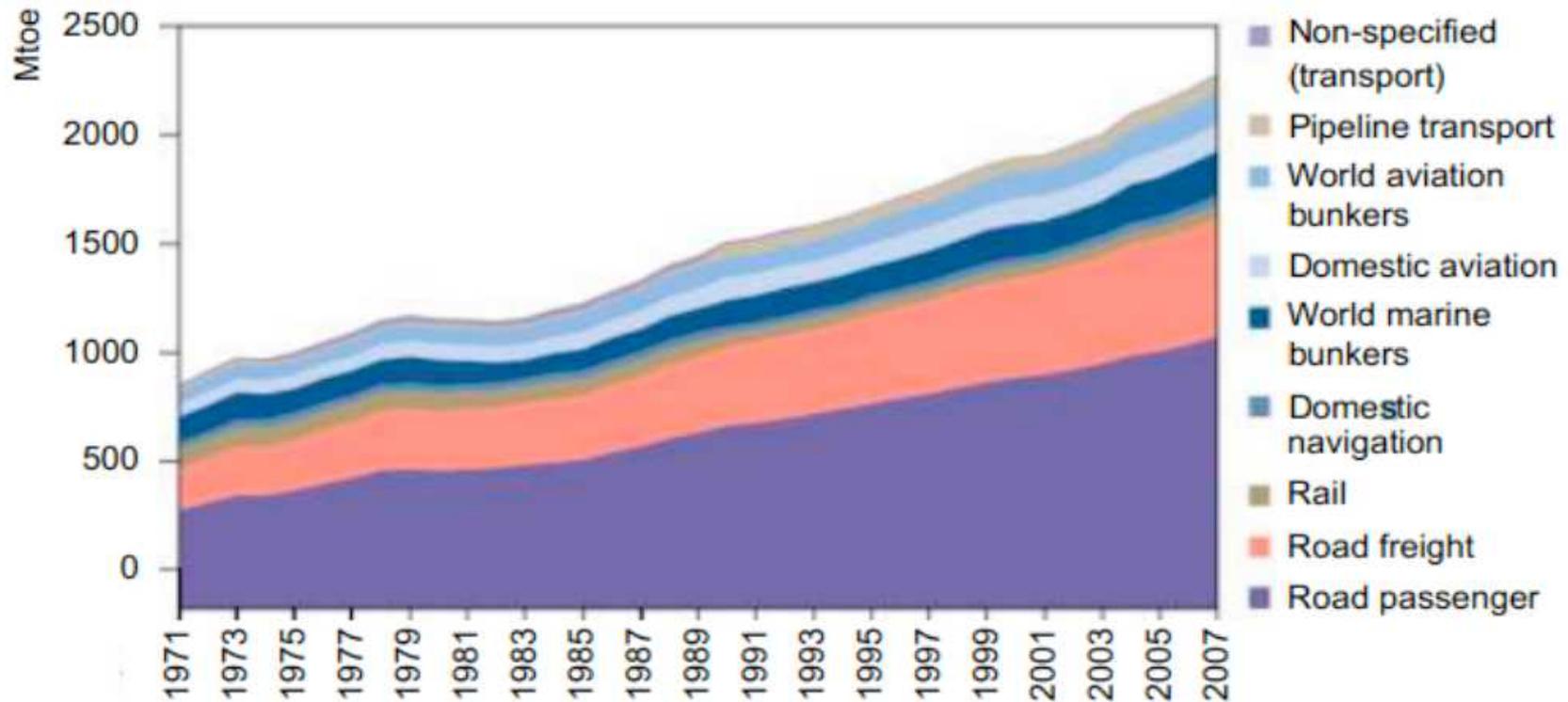
## 4. Container transport EU – Asia



**In 2009, only 140,000 TEU were transported by rail.  
Asia - EU traffic flows to increase by 64% in 2013**

Source: UIC 2012 Report on combined transport in Europe

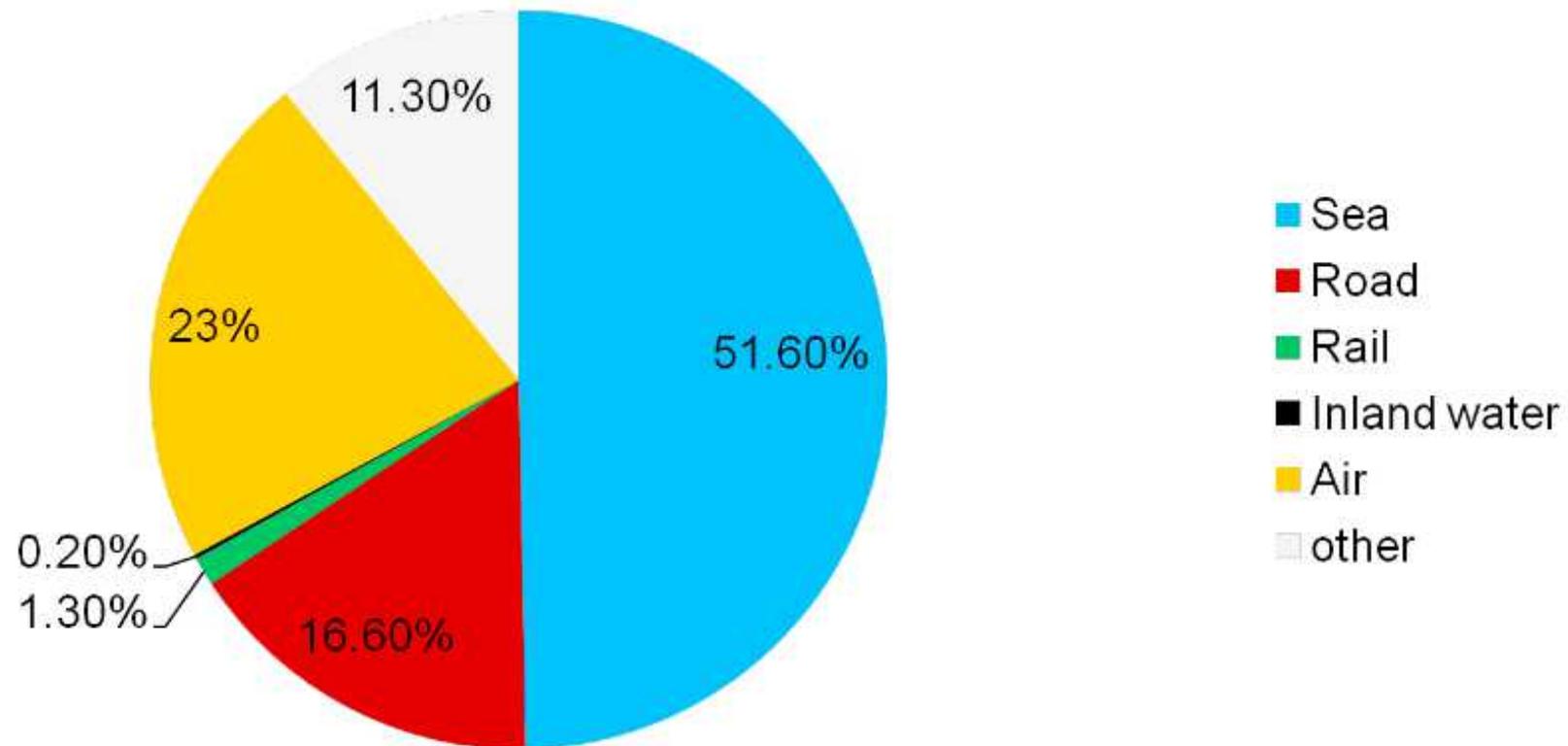
## 4. Container transport EU – Asia



### Global transport final energy use by mode (Mtoe)

Source: World Energy Council, Global Transport Scenarios 2050

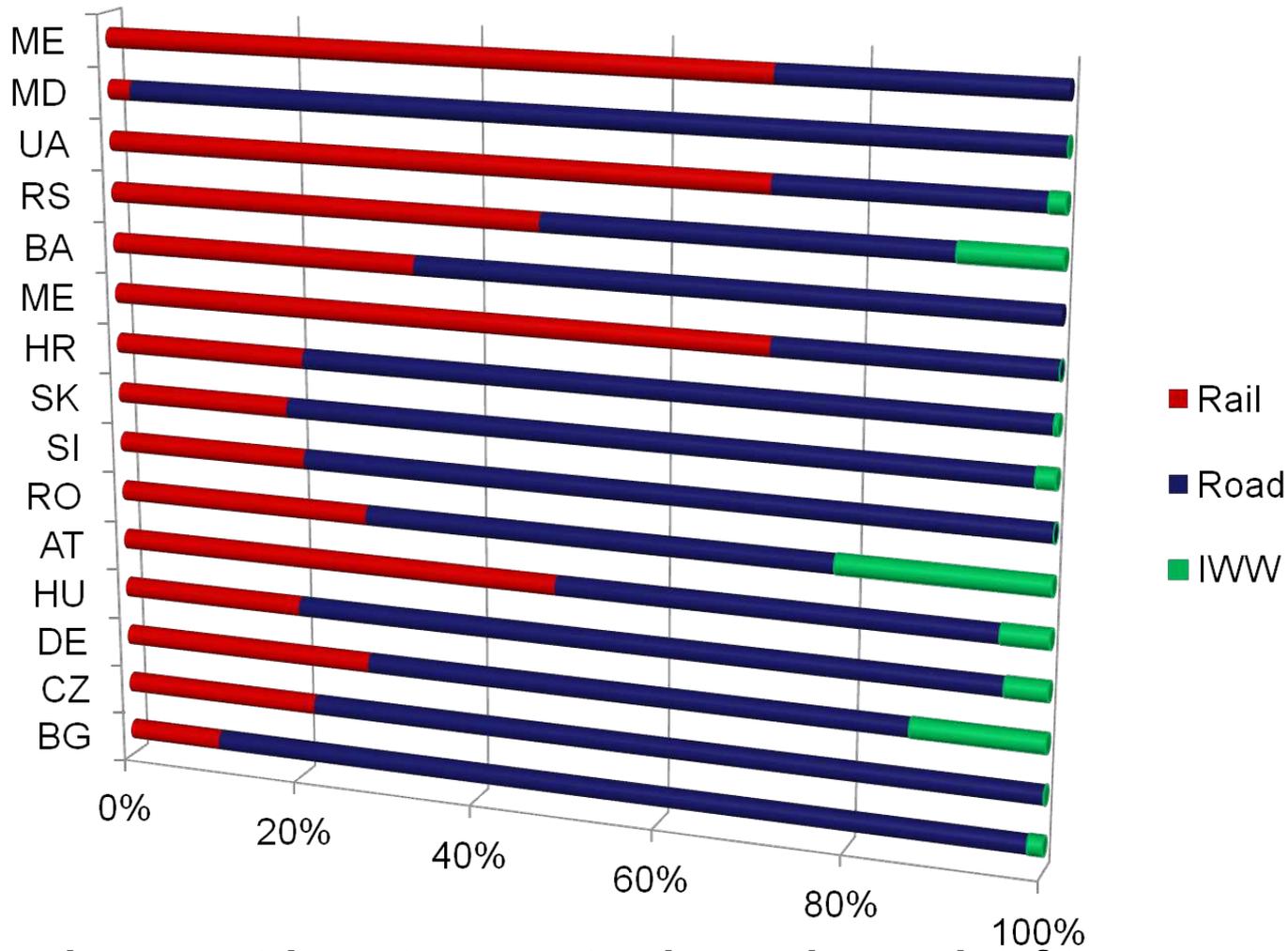
## 5. Danube Region transport figures



### EU28: External Trade by Mode of Transport (Export + Import 2011)

Source: 2013 EU transport in figures Statistical pocketbook 2013

## 5. Danube Region transport figures



\*Based on Key Transport Statistics 2012 Data, Candidate and potential candidate countries Transport and energy 2011

**Danube region countries – transport volumes by mode of transport, 2011 (thousand mio tkm)**

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## 5. Danube Region transport figures



### Inland rail connections to the Port's hinterlands

Source:  
Transcontinental  
Infrastructure  
needs to 2030/2050  
(OECD, 2011)

## 5. Danube Region transport figures



**Pan european railway corridors in the Balkans**

## 6. Romania's intermodal strategy



Compr.	Core	Compr.	Core	Compr.	Core
Conventional rail / To be upgraded	Conventional rail / Completed	To be upgraded to high speed rail	High speed rail / Completed	Ports	Ports
Conventional rail / Planned	Conventional rail / Planned	High speed rail / Planned	High speed rail / Planned		FRT

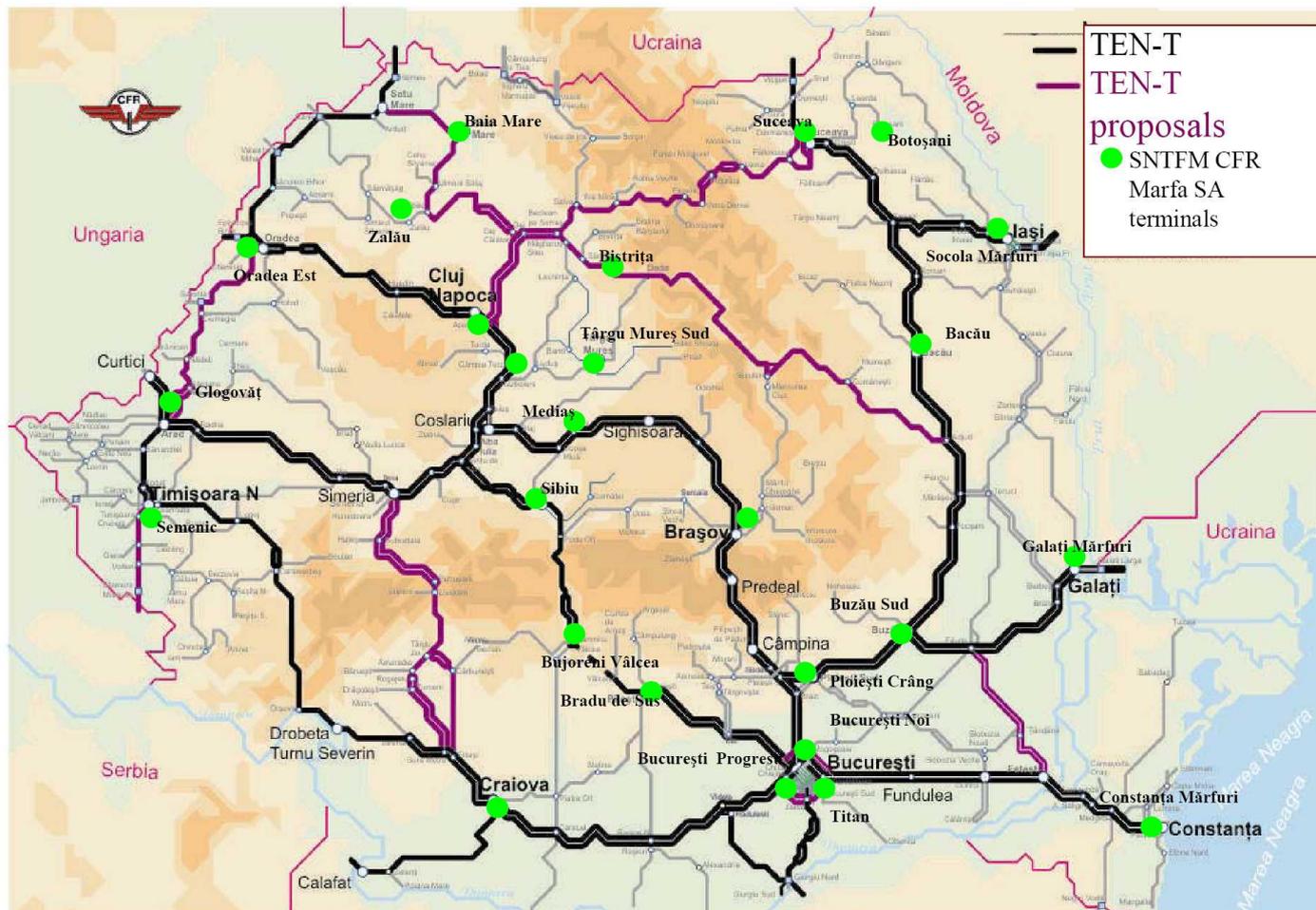
### TEN-T proposals in Romania

**New sector included in TEN-T core network:  
 Alba Iulia – Turda- Dej – Suceava – Pascani  
 – Iasi – Ungheni**

**This road and rail link is to be included in core network as connection from the urban node Timisoara to Ungheni, the border crossing point to Moldova.**

## 6. Romania's intermodal strategy

Location of SNTFM CFR Marfa SA's terminals



## 6. Romania's intermodal strategy

### Combined freight transport on the railway network

	2005	2006	2007	2008	2009
Total units *	271.774	360.695	230.829	280.389	145.065
No. containers	258.603	348.427	232.494	217.817	137.816
TEU	349.198	523793	320.923	260.936	181.238
Tonnes	4.244.877	3.410.990	3.082.257	2.700.020	1.469.748

\* Mobile units for combined freight transport: mobile containers and boxes; semi-trailers (unaccompanied); road vehicles (accompanied).

Source: Intermodal transport strategy 2020

## 6. Romania's intermodal strategy

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Source: Intermodal transport strategy 2020

## 6. Romania's intermodal strategy

### Goods transport, by mode of transport

	2006	2007	2008	2009	2010	2011	
<b>Mărfuri transportate (mii tone)</b> <i>Transported goods (thou tonnes)</i>							
Transport feroviar	68313	68772	66711	50596	52932	60723	<i>Railway transport</i>
Transport rutier	335327	356669	364605	293409	174551	183629	<i>Road transport</i>
Transport pe căi navigabile interioare	29304	29425	30295	24743	32088	29396	<i>Inland waterways transport</i>
Transport maritim	46709	48928	50449	36021	38118	38883	<i>Maritime transport</i>
Transport aerian	23	22	27	24	26	27	<i>Air transport</i>
Transport prin conducte petroliere magistrale	12702	12310	12390	8520	6551	6020	<i>Transport via petroleum pipelines</i>
<b>Parcursul mărfurilor (milioane tone-km)</b> <i>Goods transport performance (million tonnes-km)</i>							
Transport feroviar	15791	15757	15236	11088	12375	14719	<i>Railway transport</i>
Transport rutier	57278	59517	56377	34265	25883	26347	<i>Road transport</i>
Transport pe căi navigabile interioare	8158	8195	8687	11765	14317	11409	<i>Inland waterways transport</i>
Transport prin conducte petroliere magistrale	2027	1850	1720	1243	996	879	<i>Transport via petroleum pipelines</i>

Source: INS

## 6. Romania's intermodal strategy

### Rail freight indicators 2012

Transported goods 55,755 (thousand tonnes) of which:	Goods transport performance 13,471,672 (thousand tonne-km) of which:
-national 47.634 -international 7.723 -transit 398	-national 10.896.824 -international 2.298.939
Daily average transit of cargo wagons 66 (km/day)	
Average speed of cargo trains 29 (km/h)	

Source: Ministry of Transport

## 6. Romania's intermodal strategy

### Main container traffic routes

- Curtici – Constanța Seaport (via Predeal)
- Curtici – Giurgiu Nord (via Livezeni)
- Curtici – Giurgiu Nord (via Predeal)
- Stamora Moravița – Bucureștii Noi
  - Episcopia Bihor – Oradea Est
- Curtici – Bucureștii Noi (via Livezeni)
  - Giurgiu Nord – Bucureștii Noi
    - Constanța – Suceava
    - Constanța – Dornești

*Source: Intermodal transport strategy 2020*

### 3. Trade & transport trends (final)

**The railroads did not stop growing because the need for passenger and freight transportation declined. That grew. The railroads are in trouble today because the need was filled by others (cars, trucks, airplanes, even telephones) but because it was not filled by the railroads themselves. They let others take customers away from them because they assumed themselves to be in the railroad business rather than in the transportation business. The reason they defined their industry incorrectly was that they were railroad-oriented instead of transportation-oriented, they were product-oriented instead of customer-oriented.**

Theodore Levitt, **Marketing Myopia**, Harvard Business Review, 38 July-Aug 1960

***Thank you!***

***МНОГО ВАМ ХВАЛА!***

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