



The Global Language of Business

Cargostream

The independent pan-European platform for Intermodal Transport

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Brussels 9th October 2017





The Global Language of Business



Cargo Stream

The independent Pan-European platform for intermodal transport



1. **WHY** do we need a change in the intermodality approach?

2. **HOW** will we drive this change in the intermodality approach?

3. **WHAT** are the next steps to drive this change in the intermodality approach?



WHY DO WE NEED A CHANGE IN THE INTERMODALITY APPROACH?



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CONGESTION HAS A HUGE SOCIAL AND ECONOMIC IMPACT

CONGESTION



IMPACT OF CONGESTION

	COSTS			CO ₂
	DIRECT	INDIRECT	TOTAL	TOTAL
2013	47.3	29.3	76.6	6858
2020	54.9	33.4	88.3	-
2025	60.2	36.9	97.1	-
2030	65.8	41	106.8	7608
% Change	+39%	+40%	+39%	+11%

* Costs in \$ BN

** CO₂ in Kiloton Equivalent

Source : CEBR - Cost of Congestion Report



WHY DO WE NEED A CHANGE IN THE INTERMODALITY APPROACH?

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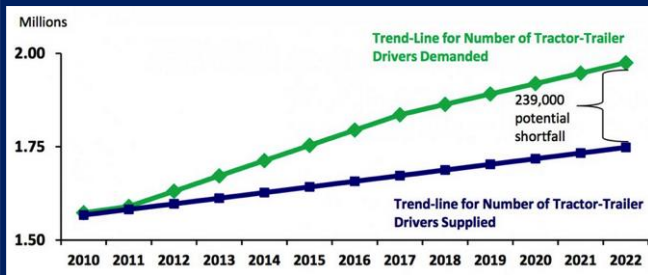
A DRIVER SHORTAGE IS EXPECTED

250000 truck drivers, representing 40 percent of Germany's professional truckers are due to retire by 2027, according to a study by ZF Friedrichshafen AG.

Source : Bloomberg, August 2013
Source : WSJ, November 2012

The US industry is short about 35,000 truck drivers, according to industry lobby group the American Trucking Associations (ATA). The shortfall could grow to around 240,000 drivers by 2020 if it is not addressed, the ATA said.

Source : Reuters, October 2014



HGV driver shortage is 'a ticking time bomb' for UK logistics sector, say MPs

13/01/2015

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The problems of recruiting younger people into the haulage industry, as a way of solving the driver shortage crisis, was revealed by a new report released by a UK Parliamentary group yesterday.

The all-party Parliamentary group for freight transport yesterday published Barriers to Youth

Employment in the Freight Transport Sector, its final report before the country votes in a general election in May, after which the group could comprise different personnel.

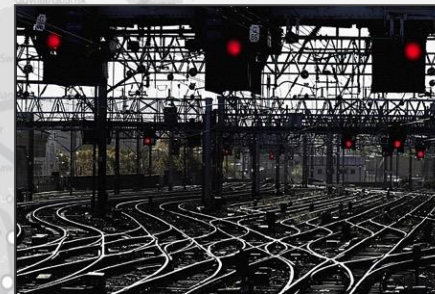


WHY DO WE NEED A CHANGE IN THE INTERMODALITY APPROACH?



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WHILE RAIL INFRASTRUCTURE IS UNDERUTILIZED



EU 27 - FREIGHT TRANSPORT STATISTICS						
	ROAD			RAIL		
	NETWORK ⁽¹⁾	VOLUME ⁽²⁾	INTENSITY ⁽⁴⁾	NETWORK ⁽³⁾	VOLUME ⁽²⁾	INTENSITY ⁽⁴⁾
1995	47970	1289	26.9	227139	386	1.7
2000	54719	1519	27.8	217857	404	1.9
2005	62218	1794	28.8	212384	413	1.9
2009	66814	1690	25.3	212693	361	1.7
% CHANGE	+ 39%	+31%	-6%	-6%	-6%	0%

(1) Length of EU-27 Motorway Network in Kilometer
(2) Freight volume shipped in EU-27 in Ton-Kilometer
(3) Length of EU-27 Railway Network in use in Kilometer
(4) Million Ton-Kilometer per Network Kilometer

Source : EU Commission - Transportation Booklet

WHY DO WE NEED A CHANGE IN THE INTERMODALITY APPROACH?

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WE ARE NOT ABLE TO SET UP AND SUSTAIN INTERMODAL CONNECTIONS

**NOT ENOUGH
CONNECTIVITY**



**NOT ENOUGH
VOLUME**



**NOT ENOUGH
FREQUENCY**



HIGH COSTS



LONG LEAD TIMES





HOW WILL WE CHANGE THE INTERMODALITY APPROACH ?

GLOBAL P&G SUSTAINABILITY REPORT

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Truck Transportation

As one of the world's largest consumer products companies, we ship a significant amount of product. To help ensure we are driving efficiency, our 2020 goal is to reduce truck transportation kilometers by 20% per unit of production versus our 2010 baseline. Our global teams have made great progress and we have reduced over-the-road truck transportation by approximately 25% since 2010 by improving vehicle fill rate, optimizing distribution routes and driving increased use of multi-modal transportation.

As P&G completes work on significant supply chain transformations in North America, and innovative efficiency projects in other regions, we will look for additional opportunities to improve our transportation footprint.



New Intermodal Network Approach

One example of improvement is P&G's innovative New Intermodal Network Approach (NINA) program in Europe. P&G launched a focused group of projects in 2008 with an ambitious goal of moving 30% of our Western Europe freight transportation from over-the-road trucks to intermodal rail and shipping lines by 2015. The team worked to find or often create new rail networks between our manufacturing plants and distribution centers across the region, reducing both emissions and congestion on local roads.

The regional program exceeded our initial target, reaching its 30% goal two years early in 2013. To continue building on our progress, we have expanded our intermodal rail networks across Europe. To drive efficiency, we also continue to add additional manufacturing and transportation partners to improve collaboration and amplify the sustainability impact to not only P&G, but also other companies in the area.

Some of our newest partnerships include:

- An innovative overnight shuttle train between our main manufacturing and distribution hubs in France and the U.K. using the Eurotunnel and available capacity on the U.K. High Speed (HS1) line. This highly efficient approach is one of our most sustainable and fastest rail connections to date, combining freight and reducing emissions for P&G and other companies.
- A high-frequency connection for customer deliveries along the main Italian North-South trade axis. This collaborative approach with [Trenitalia](#) provides enough volume for up to five intermodal trains per day, making transit and delivery times competitive with traditional over-the-road options while providing lower emissions per case.



New intermodal shipping routes implemented as part of the NINA program.



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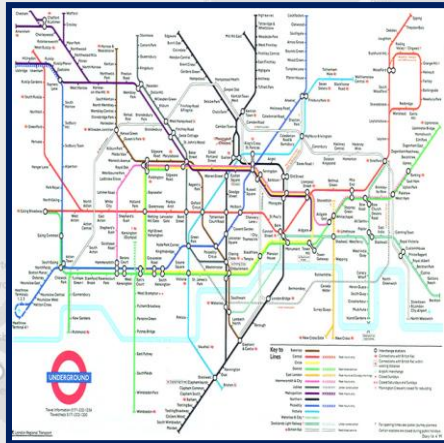


HOW WILL WE CHANGE THE INTERMODALITY APPROACH ?

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**THROUGH A NEW WAY IN WHICH WE LOOK AT
INTERMODALITY.**

**OPEN NETWORK
APPROACH**



**MULTIDIMENSIONAL
COLLABORATION**



**SYNCROMODAL
TRANSPORTATION**

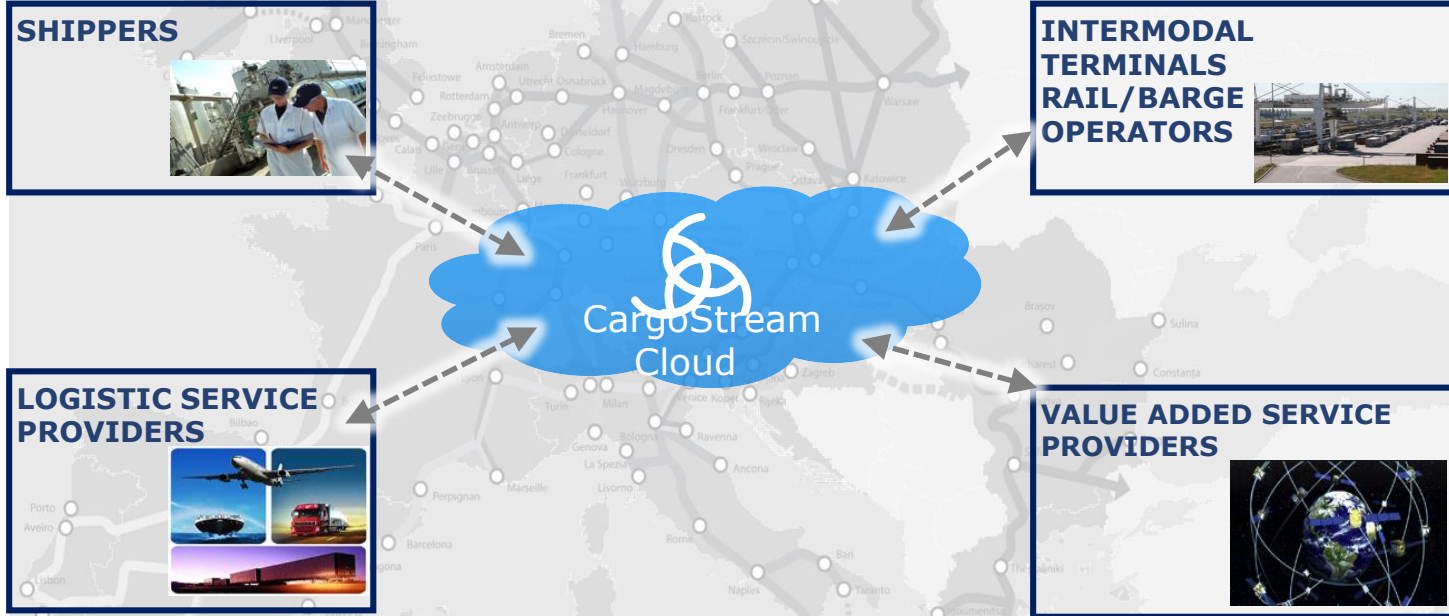




HOW WILL WE CHANGE THE INTERMODALITY APPROACH ?

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MULTIDIMENSIONAL COLLABORATION – NEUTRAL DATA SHARING PLATFORM



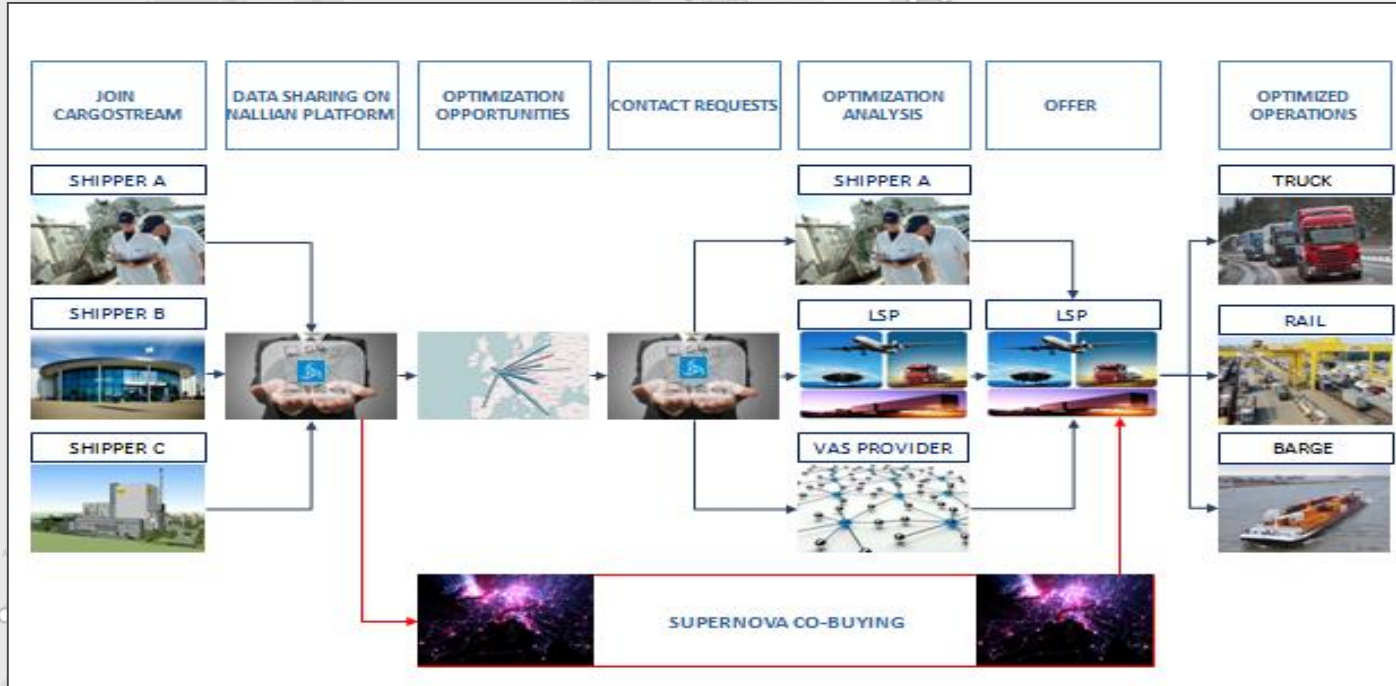
**M-M CONNECTED, ANONYMIZED, NORMALIZED, SECURE
DATA OWNERSHIP BY THE SOURCE**



HOW WILL WE CHANGE THE INTERMODALITY APPROACH ?

MULTIDIMENSIONAL COLLABORATION – NEUTRAL DATA SHARING PLATFORM

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WHAT IS DONE ALREADY TO CHANGE THE INTERMODALITY APPROACH ?



TESTS RUNS.

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Opportunity 14

[BACK TO OVERVIEW](#)

BUNDLING:

Lane number	Shipper	FROM			TO			Lane distance	Volume
		City	Postal code	Country	City	Postal code	Country		
60584				BE			GB	379.5767	
66621				BE			GB	386.6509	

BACKHAUL:

Lane number	Shipper	FROM			TO			Lane distance	Volume
		City	Postal code	Country	City	Postal code	Country		
60277				GB			BE	376.9650	



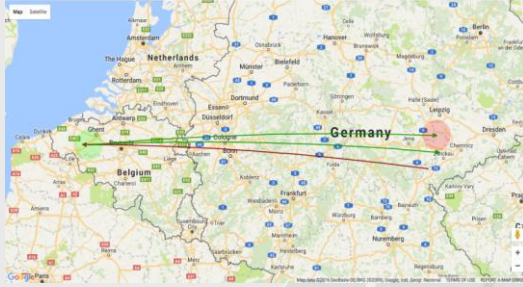


WHAT IS DONE ALREADY TO CHANGE THE INTERMODALITY APPROACH ?



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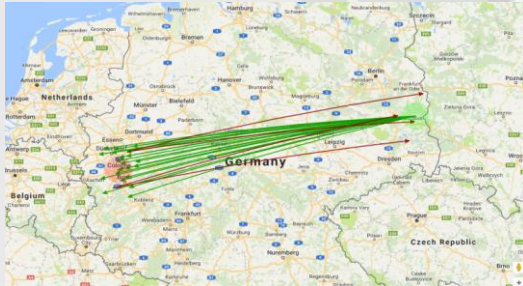
TESTS RUNS.



Basic bundling Road



Multiple bundling, Intermodal





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WHAT ARE THE NEXT STEPS TO CHANGE THE INTERMODALITY APPROACH ?

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JOIN CARGOSTREAM AS A SHIPPER.

JOIN CARGOSTREAM AS A TERMINAL.

JOIN CARGOSTREAM AS A LOGISTIC SERVICE PROVIDER.

JOIN CARGOSTREAM AS A VALUE ADDED SERVICE PROVIDER.



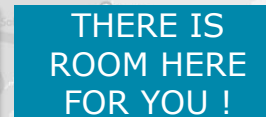
WELCOME ON BOARD OF THIS OPEN NETWORK



WHO HAS JOINED ALREADY?



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CargoStream



age of Business

Keep me in the loop!



www.cargostream.net

