



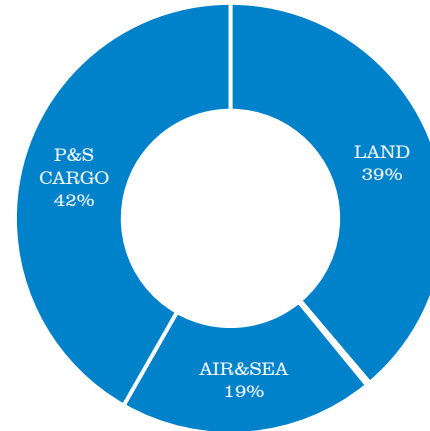
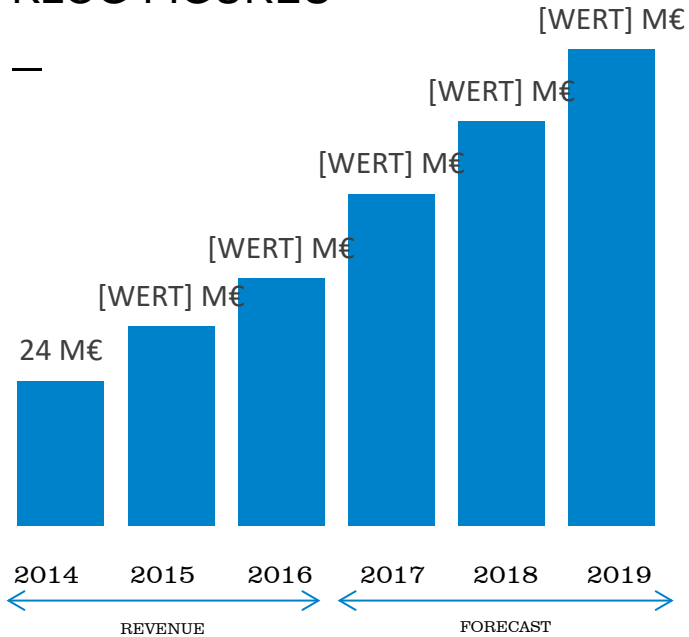
TRANSPORT
SOLUTIONS

IBS CONFERENCE

13.10.2017

OUR PASSION DRIVES US
TO NEW CHALLENGES
KLOG.PT

KLOG FIGURES



50% INTERMODAL



60,350
TONNES



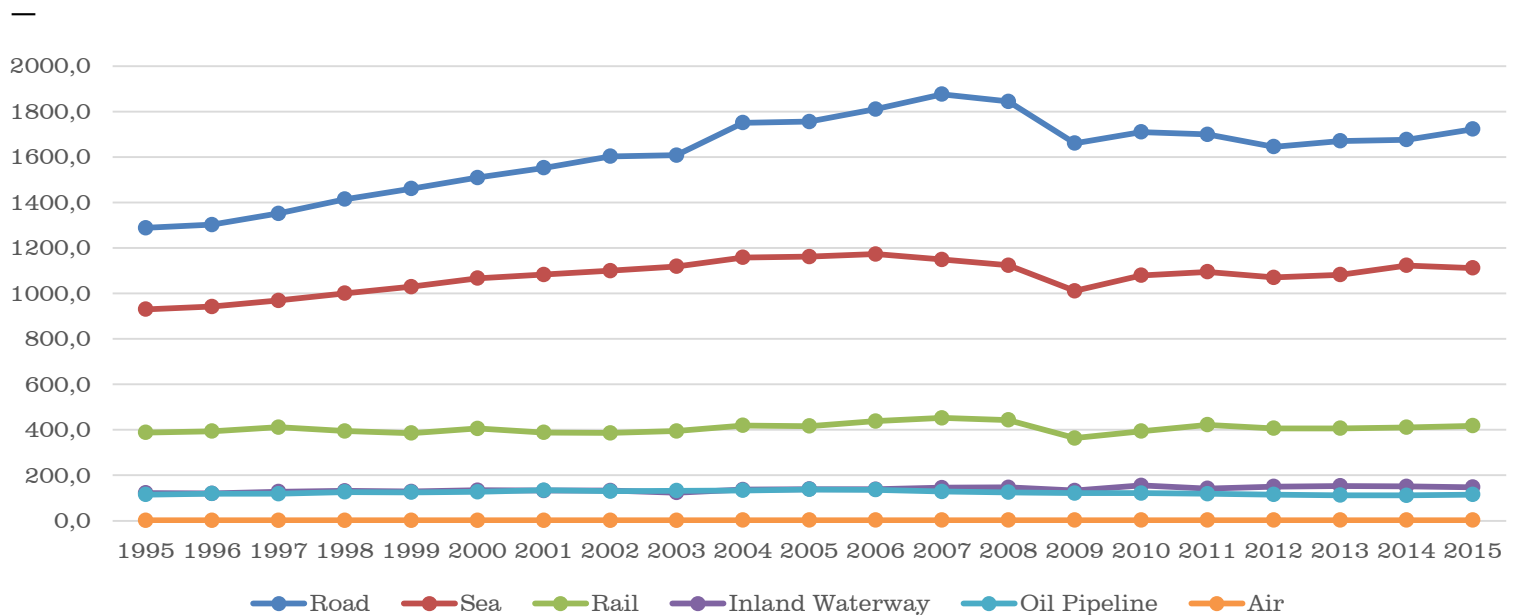
21.954.800 Kg
REDUCTION CO²



10,000 M²
WAREHOUSE

BASIS 2016

EU28 PERFORMANCE BY MODE FOR FREIGHT TRANSPORT (1995 – 2015 / BILLION TONNE-KILOMETRES)



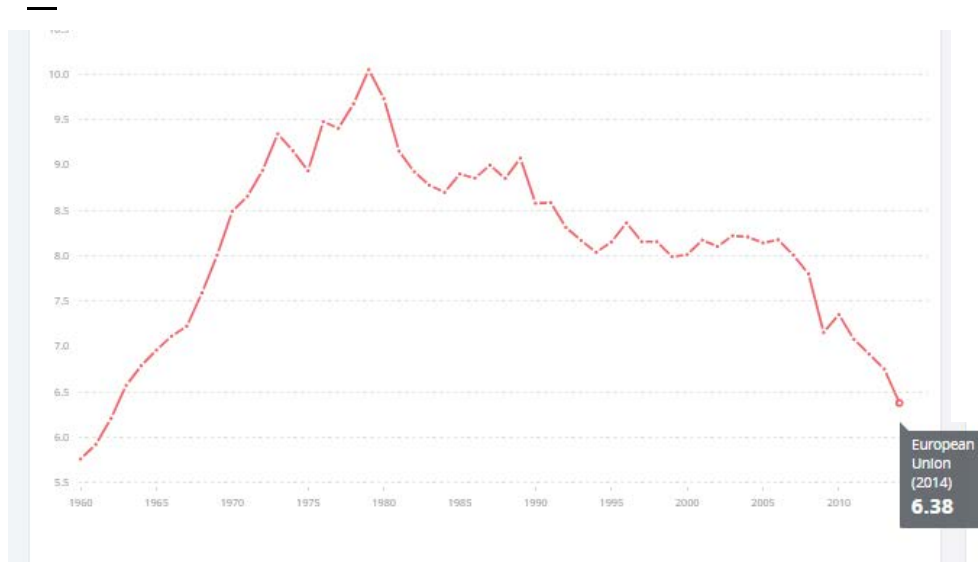
EU28 PERFORMANCE BY MODE FOR FREIGHT TRANSPORT (1995 – 2015 / BILLION TONNE-KILOMETRES)

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	Road	Rail	Inland Water-ways	Pipe- lines	Sea ⁽¹⁾	Air	Total
1995 -2015	33,7%	7,6%	20,8%	0,2%	19,5%	44,9%	23,6%
per year	1,5%	0,4%	0,9%	0,0%	0,9%	1,9%	1,1%
2000 -2015	14,1%	3,0%	10,2%	-9,4%	4,2%	18,3%	8,4%
per year	0,9%	0,2%	0,6%	-0,7%	0,3%	1,1%	0,5%
2014-2015	2,8%	1,6%	-2,2%	3,5%	-1,1%	0,9%	1,2%

1. The time series for maritime transport performance has been revised, for the period from 2005 to 2014, by replacing previous estimates on port-to port distances with more accurate measurements by Eurostat. The time series from 1995 to 2004 has been recalibrated by DG MOVE in line with the new Eurostat figures to avoid break in series. The revision of tkm figures mainly concerns the calculation of distance travelled and not the tonnages transported by sea.

ENVIRONMENTAL



“The EU was the first major economy to submit its intended contribution to the new agreement in March 2015. It is already taking steps to implement its target to reduce emissions by at least 40% by 2030.”

CO2 emissions (metric tons per capita)
Source: World Bank national accounts data

COP 21 – Paris European Commission Climate Action

SOCIAL

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The road freight transport sector is the dominant freight mode



Driver shortage



Price rise



Instability / Colapse



“French research into lorry driver working times and habits showed that risk levels vary with three key factors as regards the general problem of fatigue.”

“The US Federal Motor Carrier Safety Administration [33] has published data showing the relative risk of a fatigue crash and hours driven.”

“A Dutch survey study amongst 537 truck drivers investigated determinants of both chronic and acute fatigue (defined as actually dozing off or falling asleep behind the wheel).”

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Driving hours

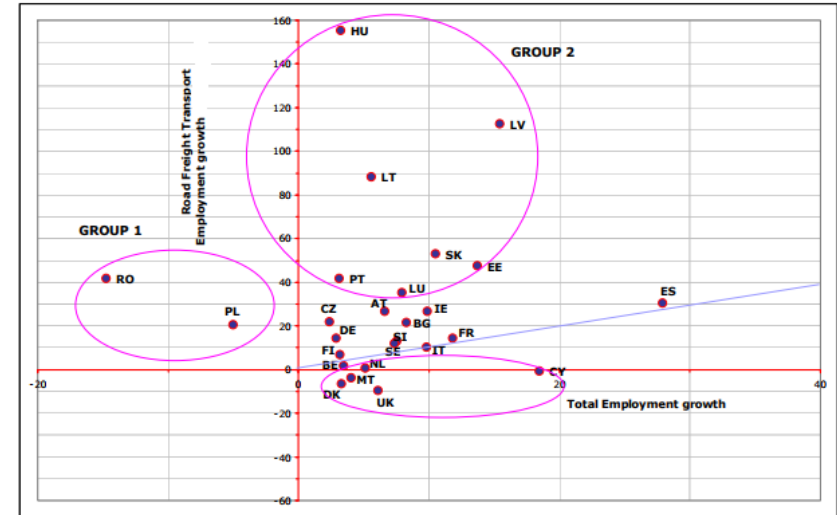
Source: Eurostat

SOCIAL

Country	Estimated number of drivers	Assumed shortage ratio	Estimated driver shortage
EU-27	1,960,000	3.8	74,480
Belgium	44,157	3.6	1,590
Czech Republic	72,360	5	3,618
France	244,269	2	4,885
Germany	216,646	3.3	7,149
Italy	237,585	3.9	9,266
Poland	157,366	5	7,868
Portugal	45,361	4.6	2,087
Romania	53,492	3.2	1,712
Spain	275,160	4.5	12,382
The Netherlands	86,065	4.8	4,131
United Kingdom	208,061	0.7	1,456

Estimated driver shortage in 2012

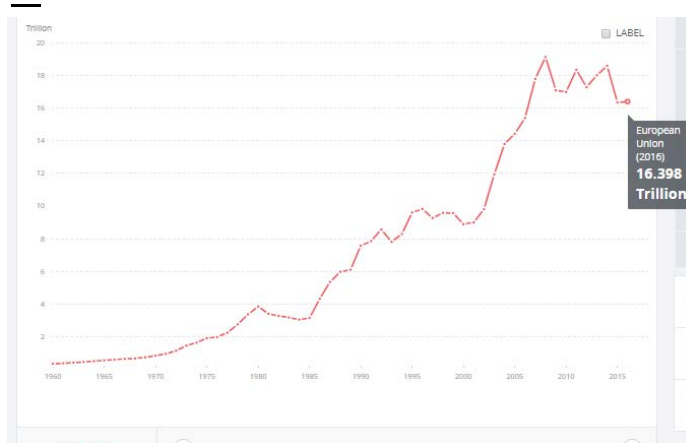
Source: TRT elaboration based on Eurobarometer and Eurostat data



Employment growth in road freight transport vs total employment growth (%)

Source: own elaboration on Eurostat, LFS and Eurostat, SBS

ECONOMIC EUROPEAN GDP V VARIATION ROAD RATES



GDP (current US\$)

Source: World Bank national accounts data

Positive rates		Negative rates	
Hungary	134.8	Luxembourg	-0.1
Latvia	103.9	Sweden	-2.6
Poland	93.5	Netherlands	-15.3
Lithuania	74.6	Austria	-15.5
Slovenia	65.6	France	-15.7
Slovakia	64.4	United Kingdom	-19.2
Estonia	23.6	Belgium	-21.2
Greece	20.6	Finland	-22.3
Portugal	19.2	Italy	-22.7
Ireland	16.9	Denmark	-26.9
Germany	14.8		
Czech Republic	7.8		
Cyprus	5.9		
Spain	3.7		

Data are not available for Bulgaria and Romania.

Variation of the international transport flows (2007 – 2014)

Source: Eurostat



SOLUTION



“The logistics and organisation of road transport firms should be improved by increasing labour efficiency, improving logistic and organisation management, and **increasing the use of alternative modes.**”

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Policy Department B: Structural and Cohesion Policies

EUROPEAN MULTIMODALITY

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REFERENCE VALUES

+ 800 FTL RAIL / MONTH
+ 500 FTL SHORT-SEA / MONTH +
400 RORO / MONTH



SHORT SEA SHIPPING

Catalunha – Greece
Barcelona – Savona
Porto – Rotterdam or Zeebrugge
North of Spain – Rotterdam



RAIL

Terminal PT – Catalunha / South of
France
Bettembourg – Le Boulou



TRUCK

100% First / Last Mile
controlado pelos nossos
meios

CONTROL TOWER CONCEPT

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**CAPACITY – DAILY
LOADINGS**



**KLOUD
DAILY PERFORMANCE -
STATUS UPDATE**



**PEOPLE
DEDICATED CUSTOMER
SERVICE (24H/24H)**

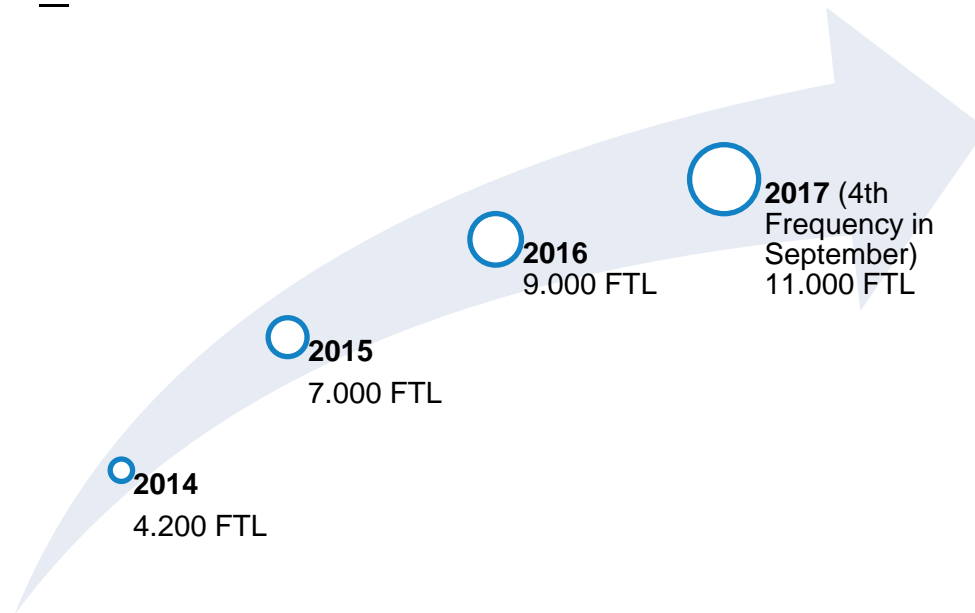


**FULL SUPPLY CHAIN
CONTROL BY KLOG MEANS
EQUIPMENT, HAULIEURS,
KLOG STAFF**

EUROPEAN INTERMODAL NETWORK



RAIL DAILY DEPARTURES – IBERIAN CATALONIA CORRIDOR



2018 / 2021

DAILY DEPARTURES – HIGH FREQUENCY

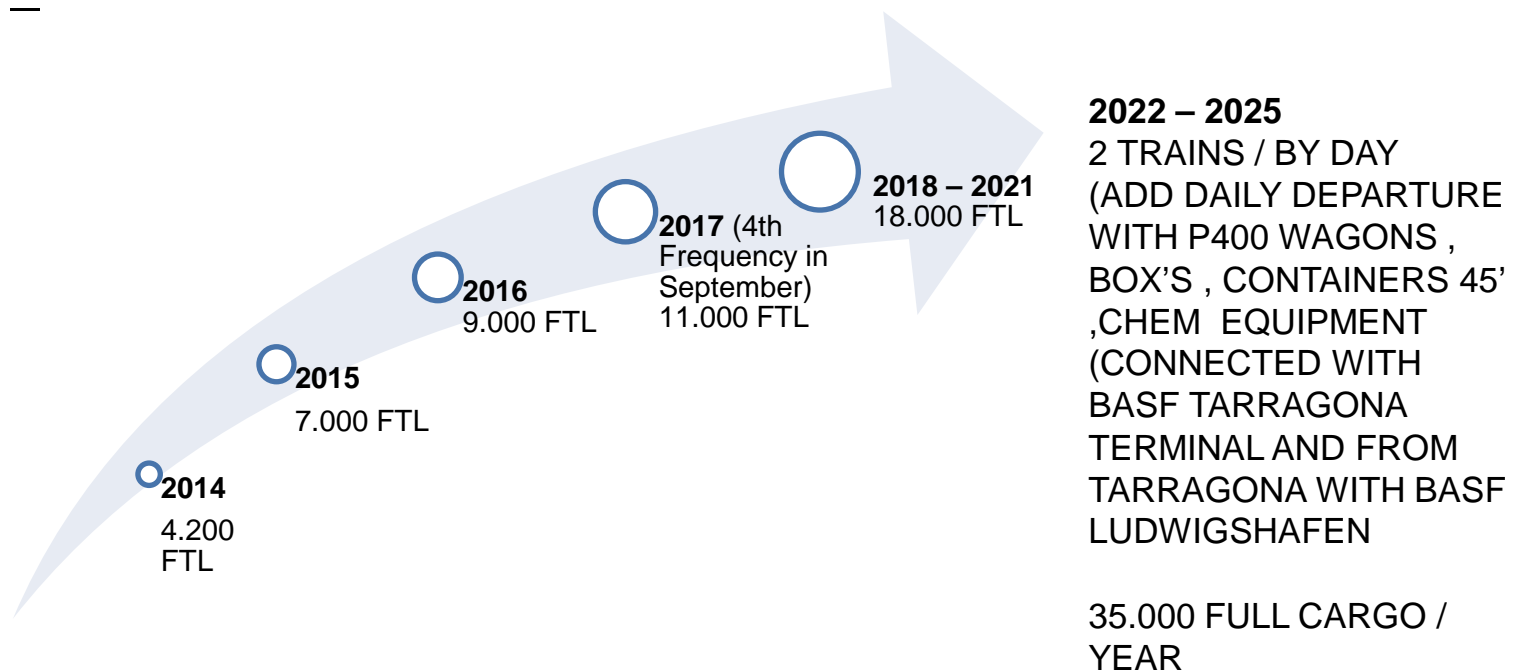
18.000 FTL / YEAR

**RAIL FULL INTEGRATION OF MULTI CLIENTS AND MULTI PRODUCTS
(CONNECTED 2020/2021 WITH THE BASF TERMINAL – CTC TARRAGONA CHEM INDUSTRY)**

EUROPEAN INTERMODAL NETWORK



RAIL DAILY DEPARTURES – IBERIAN CATALONIA CORRIDOR





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