CT-SALZBURG | CT-ENNS
GATEWAYS SERVING THE HEART OF AUSTRIA
CORONA – IS THERE AN IMPACT ON OUR SUPPLY CHAIN?

ENNS LOCATION ON THE RIVER DANUBE:  48°14´8´´N 14°29´59´´O
WE TAKE THE LEAD – AS OF 01.10.2019 ENNS IS No 1 IN AUSTRIA
No 1 – WITH 100 TRAINS PER WEEK  No 1 – IN HANDLING WITH 400,000 TEU‘s/Year
No 1 – IN SPACE WITH 270,000 sqm

SALZBURG – LOCATED AT THE BORDER TO BAVARIA
50 TRAINS PER WEEK  275,000 TEU‘s/Year

AUSTRIAS LEADING GATEWAY’S FOR COMBINED TRANSPORT

NEUTRAL – CENTRAL – TRIMODAL
YOU HAVE TO OPERATE YOUR TERMINAL NEUTRAL – FREE OF DISCRIMINATION – OPEN TO THE MARKETS – READY TO SERVE THE INDUSTRY

Aktionstage Kombinierter Verkehr - Salzburg  www.ct-salzburg.at  www.ct-enns.at
INTRO STAKEHOLDERS – to whom we proudly belong to

M. Kaindl OG Salzburg  100% OWNER OF CTS SALZBURG  51% OWNER OF ENNS
- founded 1897 in Lungötz
- privately owned by the Kaindl family
- 425 Mio € annual sales turnover
- 800 employees in Austria – 18.000 employees WORLDWIDE (KRONOSPAN)
GLOBAL MARKET LEADER IN WOOD PROCESSING

DB INTERMODAL SERVICES  49% OWNER OF ENNS
- founded 1995
- owned by DB-Cargo
- 2,9 Mio container movements per year (TFG)
- 500 employees in Germany
- 600 trains per week in Germany
- 900 international trains per week
THE EUROPEAN TRANSPORT LEADER
ENNS – SPANNING SOME 270.000 SQM ON THE RIVER DANUBE!

ENNS - MOST MODERN TRANSSHIPMENT INFRASTRUCTURE IN AUSTRIA!
CT-Salzburg – serving WESTERN AUSTRIA

CT-Salzburg – SPANNING SOME 100.000 SQM IN THE HEART OF AUSTRIA!

CT-Salzburg – EXTENTION 2020 – 140.000 SQM TERMINAL AREA!
Terminal Enns – equipment and facility

- 10 cranable railtracks 720m each
- 24 KM own railsidings in the Port of Enns
- 620m berth lengths for river barges – capacity – 3 berths – draft 4 meter
- 4 RMG/STS cranes (41 TONNS each)
- 4 Reach Stackers
- 2 ETY handlers
- 40 employees - workforce

- Land Space: 220,000 sqm  After Extention 2019: 270,000
- Rail Services: On Dock Rail Facility – working track: 7,000 Meter cranable
- Annual Handling Capacity: 500,000 TEU’s (after extension 2019)
- Storage Capacity: 10,000 TEU’s
- Refrigerated Plugs: 10
- Gates: 3 gates automated and semi-automated

WE PROVIDE TECHNOLOGY
Enns & Salzburg CCT’s as main HUB for central and western part of Austria, including Bavaria

via Bremerhaven to: USA, Canada, Latin America
via Hamburg to: Far-East, Near-East, Middle-East, Africa
via Rotterdam to: Far-East, Near-East, Middle-East, Africa
via Trieste to: Far-East, Near-East, Africa
via Koper to: Far-East, Near-East, Africa
via Piraeus to: Far-East

CTE IS PART OF THE PORT OF ENNS LOCATED ON THE RIVER DANUBE
WE SERVE MARITIME CONTAINER VOLUMES – BY RAIL ROAD AND RIVER!

CTS IS WELL CONNECTED TO SOUTH AND NORTH EUROPEAN MAIN PORTS EMP’s – LOCATED ON THE BORDER TO GERMANY!
TRAFFIC ACCESABILITY

ROAD RIVER RAIL

TRIMODALITY AT IT’s VERY BEST – 150 TRAIN’S PER WEEK

Export Enns - nach Empfangsrelation in TEU

<table>
<thead>
<tr>
<th>Export nach Empfangsland</th>
<th>Jahr 2018</th>
<th>Jahr 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>8.618</td>
<td>14.552</td>
</tr>
<tr>
<td>Tiger Staaten (Singapore, S-Korea, Hongkong, Taiw)</td>
<td>5.521</td>
<td>11.529</td>
</tr>
<tr>
<td>Indien</td>
<td>4.461</td>
<td>4.112</td>
</tr>
<tr>
<td>Taiwan</td>
<td>845</td>
<td>1.184</td>
</tr>
<tr>
<td>Japan</td>
<td>1.859</td>
<td>2.472</td>
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<tr>
<td>Nahost</td>
<td>1.752</td>
<td>1.355</td>
</tr>
<tr>
<td>USA</td>
<td>24.914</td>
<td>25.078</td>
</tr>
<tr>
<td>Südafrika</td>
<td>3.082</td>
<td>3.392</td>
</tr>
<tr>
<td>Australien</td>
<td>1.339</td>
<td>5.836</td>
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<tr>
<td>Südamerika</td>
<td>674</td>
<td>6.000</td>
</tr>
<tr>
<td>Neuseeland</td>
<td>3.952</td>
<td>35.000</td>
</tr>
<tr>
<td>Canada</td>
<td>827</td>
<td>711</td>
</tr>
<tr>
<td>Afrika</td>
<td>1.752</td>
<td>1.355</td>
</tr>
<tr>
<td>Nahost</td>
<td>5.850</td>
<td>3.585</td>
</tr>
<tr>
<td>Gesamtsumlaufvermögen</td>
<td>72.204</td>
<td>80.811</td>
</tr>
</tbody>
</table>

25% USA-Canada 28.000 TEU
30% Asien 35.000 TEU
6.000 Süd-Amerika
3.800 Afrika

Asien Export Dienste der Reedereien: Cosco, Maersk, ONE, MSC, Hapag, CMA
Gefiltert auf Basis Empfangshafen und einer Region/Empfangsland zugeordnet.
Diese Dienste sind von der Leercontainerknappheit stärker als die übrigen Trades betroffen.
Enns connects: Hamburg, Bremerhaven, Wilhelmshaven, Trieste, Koper & Piraeus - with the heart of AUSTRIA

GATEWAY Shuttle-Services high-frequency PORT CONNECTIONS

- Hamburg/Maschen- Enns
- Hamburg CTA/CTB - Enns
- Bremerhaven 1-3 & 4 - Enns
- Piraeus - Enns
- Koper - Enns
- Enns - Wien
- Enns - Graz
- Enns - Salzburg
- Enns - Linz
- Enns – Sprinter (Cargotaxi)

SEAPORT - Enns - Gateway - Final DESTINATION HINERLAND

MIX TRAIN IN THE PORT COMPOSED TO DESTINATION

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BALANCED FLOW
BEST TO HAVE – OBVIOUSLY UNCOMMON
Container flow for import and export between two or more countries are similar.
FOR EACH FULL CONTAINER UNLOADED A EXPORT LOAD IS AVAILABLE

HYBRID FLOW
COMMON SITUATION
Container flows are showing imbalances.
EXPORT LOAD WILL NOT ALLWAYS FIND A EMPTY CONTAINER AVAILABLE OUT OF IMPORT TRAFFIC.
EMPTY CONTAINERS NEED TO BE POSITIONED.

IMBALANCED FLOW
UNCOMMON SITUATION CAUSED BY SUPPLY CHAIN PROBLEMS
Container flows in one direction only, no import or insufficient feeding of hinterland depots.
NOT A SINGLE CONTAINER AVAILABLE FOR EXPORT LOADS
CONTAINER FLOW  FAR-EAST EUROPE  VICE VERSA
CURRENT SITUATION IN CHINA

CONTAINER IMBALANCE = NO EMPTY DC FOR EXPORT EB

Blanc SAILINGS: 18 BS PLANNED FOR CNY (Totalausfälle)
12 BS ARRANGED FOR CORONA IMPACT

OCEAN ALLIANCE – MED-LOOP 4 (ADREATIC) STOPPED
TOTAL 16 BLANC SAILINGS (2019 6 BS)

2M+ZIM Alliance
TOTAL 7 BLANC SAILINGS (2019 9 BS)

THE+HMM Alliance
TOTAL 7 BLANC SAILINGS (2019 4 BS)

BLANC SAILINGS 2020: 30 (2019 19 BS)

EXPECTATION: 700,000 TEU WILL NOT FIND THEIR WAY
CURRENT SITUATION IN CHINA – PRODUCTION + TRAFFIC

Positive recovery of activity in EB-Traffic
Government encouraging population to resume back to work!
Free travel, highway tolls are made free!
Fresh production pushed by government

NORTH CHINA: Week 10
90% overall North China markets have resumed in week 10
100% recovery End 1st week march. Dalian port, factories and trucking running on
100%. Qingdao on 90%, 80% of truckers resumed this week!

SOUTH CHINA: Week 10
Better than Central China, overall recovery is positive
70% of factories and trucking companies reopened in week 10 Xiamen Area – 90% with
60% of trucks running

CENTRAL CHINA: Week 10
Slow recovery compared to rest of China. Trucking shortage - capacity at 40% only.
60% of factories have resumed. Full production recovery expected for 2nd week of
March
Inhalt

ASIEN

70% der Importe aus betroffenen Ländern

55% der Exporte in betroffene Länder

EMP = EUROPEAN MAIN PORTS

Chinese factories resume back to work since mid of February, some might even shut down for up to 3 weeks. China’s Transportation system is still partly blocked. Manufacturing Projects are on hold. Overall positive recovery of activities are noticeable!

BLANC-SAILINGS: Import from Asia to Europe – no sailings = significant effects!
Eastbound Export: Export from Europe to Asia – sufficient amounts of empty containers needed!

KW 9: Nahezu keine Auswirkungen Leercontainer kommen aus den EMP’s Export zu den EMP mit hohen Zugsauslastungen Import zu den EMP’s mit Minderauslastungen von ca. 30%-50%

KW 10/11: Leercontainer FLOW wird zunehmend schwächer, keine Boxen mehr in EMP’s Export zu den EMP’s mit Rückgängen – Mangel an Leercontainern Erste Zugauslegungen der Operator – betroffen sind 150 Züge/Woche (Enns/Sbg) Import aus China – Ware für Versand nach CNY geordert fehlt in der Supply Chain Letzte gut ausgelastete Import Schiffe treffen in den Häfen ein Import zu den EMP’s mit Minderauslastungen von ca. 60%-80%


Erholung der Transportmenge voraussichtlich spürbar ab Anfang Mai!
Erhöhung der FAK Raten zu erwarten – Seefrachten werden deutlich teurer!
BMW – Bayrische Motorenwerke
MAN – trucks and vehicles
Lenzing Fibre – industry
Hofer – retail trade
IKEA – furnitures
Lutz – XXX Lutz furnitures
Fischer – sporting goods
Kaindl – woodworking industry
Schwaighofer – woodworking industry
Atomic – sporting goods
DOKA – leader in construction tools
Swarovski – glas industry
Montanwerke Brixlegg AG
AMAG - metal
KTM – vehicles
RHI AG – mining
Egger – woodworking industry
WE ARE SERVING AUSTRIA’S LEADING INDUSTRY & TRADE
Aktionstag Kombinierter Verkehr
Danke für Ihre Aufmerksamkeit!

Bundesministerium
Klimaschutz, Umwelt, Energie, Mobilität, Innovation und Technologie

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Container Terminal Salzburg GmbH

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