

# PKP CARGO JUNE 2019

„Railway intermodal  
transport“



Uncontested  
**LEADER POSITION**

# 01



PKP CARGO Group is the key player on the European rail freight market

1

Market leader on the rail freight market in Poland

2

Second largest rail freight operator in CEE

2.3 k

Locomotives

64 k

wagons

#1 fleet in Poland

2

logistic centres

9

container terminals

16

handling terminals

25

subsidiary companies  
in PKP CARGO Group

9

countries  
where PKP CARGO operates

including:  
15 multisystem locomotives  
>3000 intermodal platforms

including:  
the largest dry port in the  
region - Małaszewicze

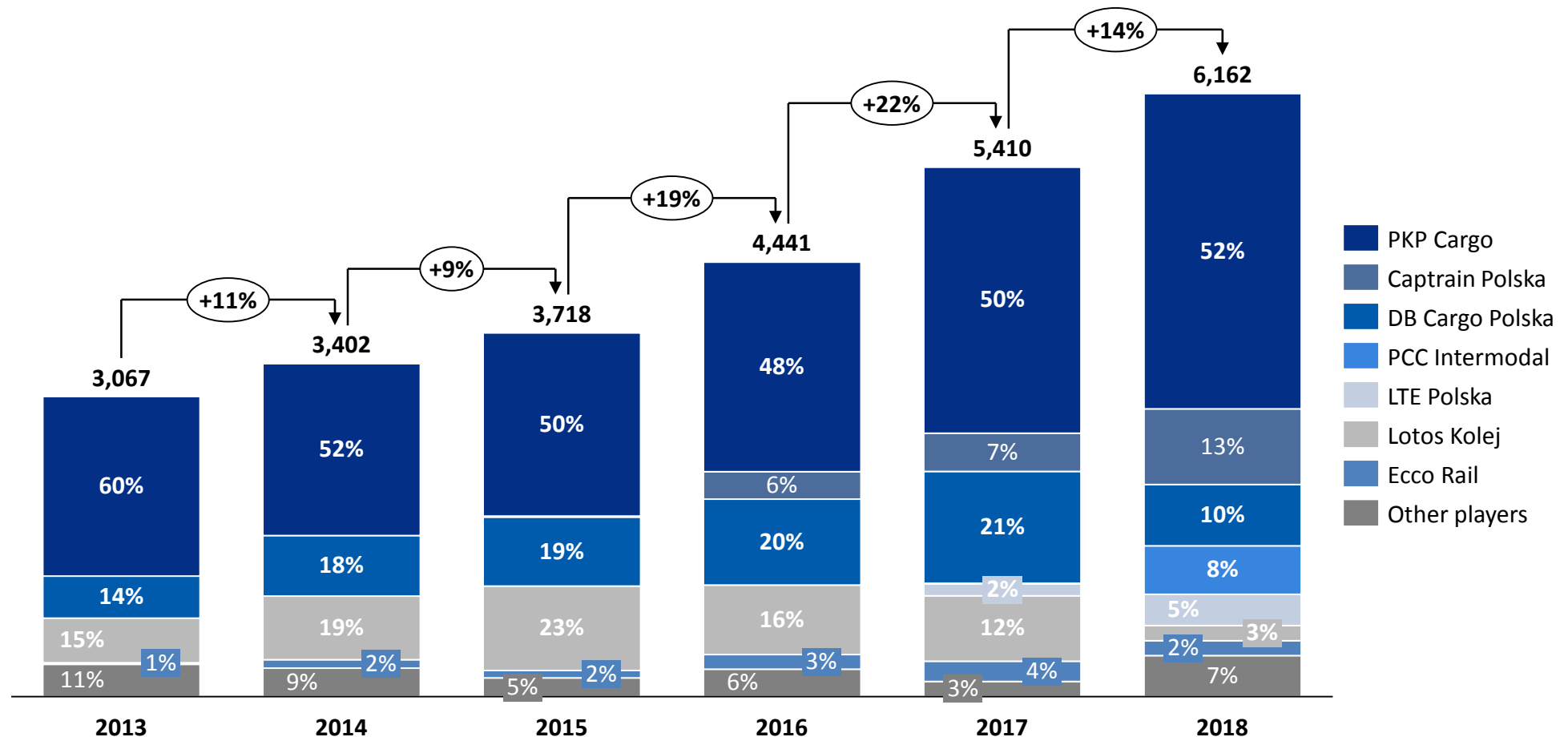
ultimately to serve the  
intermodal market:  
PKP CARGO INTERMODAL  
PKP CARGO INTERNATIONAL

Including:  
Slovenia - a new market of the  
PKP CARGO Group



PKP CARGO Group consistently increases its market share on a dynamically growing intermodal market

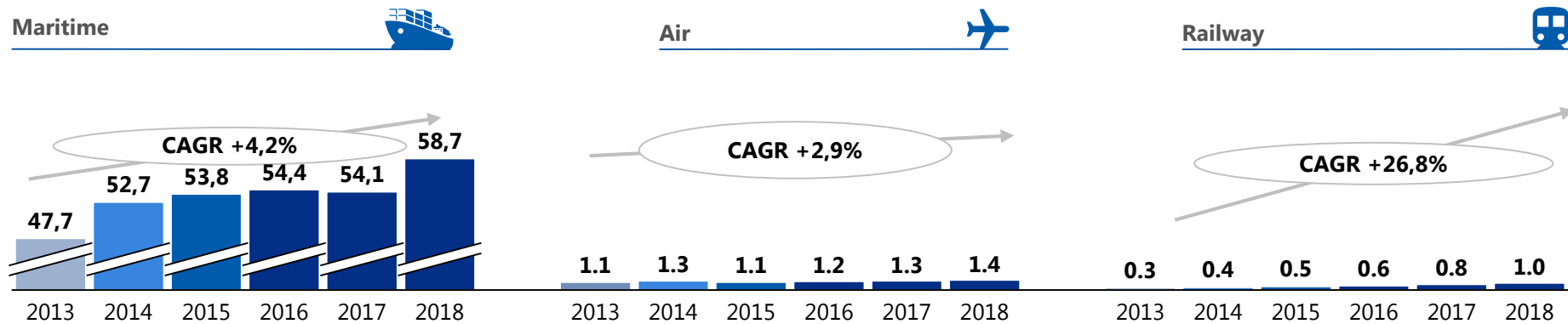
## SHARE OF RAIL OPERATORS IN INTERMODAL TRANSPORT MEASURED BY FREIGHT TURNOVER



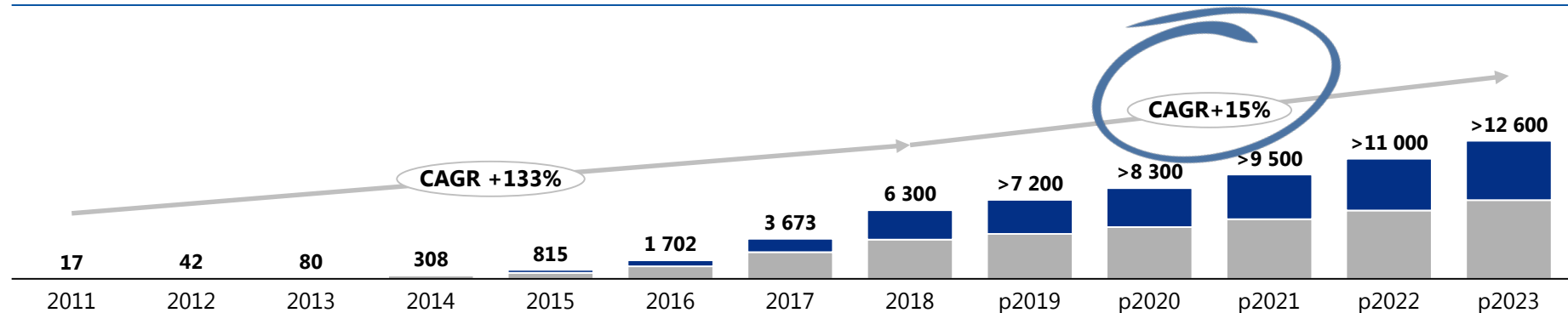
# 03

Rail freight transportation between China & EU grows much faster than maritime and air transportation

## FREIGHT VOLUME TRANSPORTED FROM CHINA TO THE EU BROKEN DOWN BY TYPE OF TRANSPORT IN 2013-2016 [MILLION TONNES]



## NUMBER OF TRAINS ON THE CHINA-EUROPE ROUTE [BOTH DIRECTIONS]



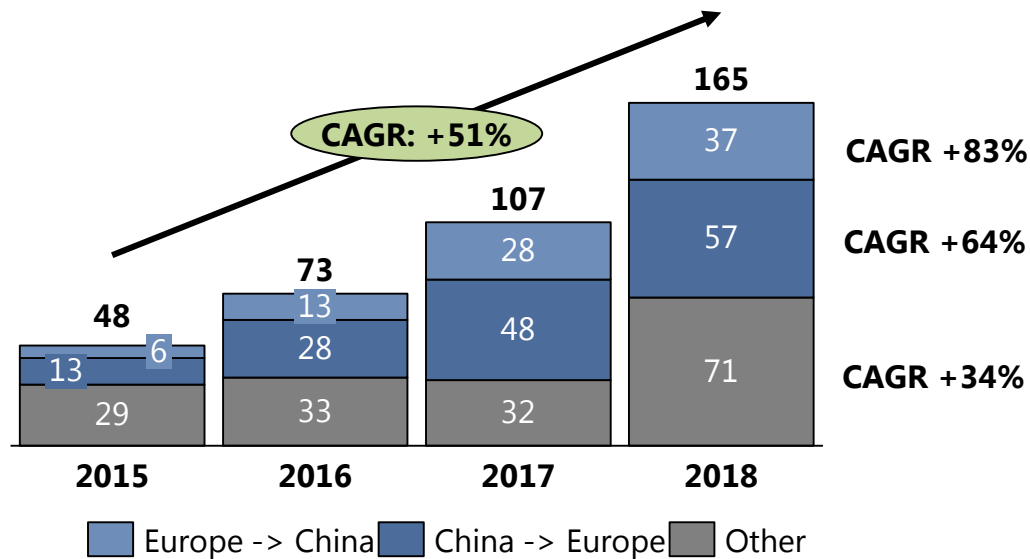
■ Europe -> China ■ China -> Europe

PKP CARGO GROUP 2019

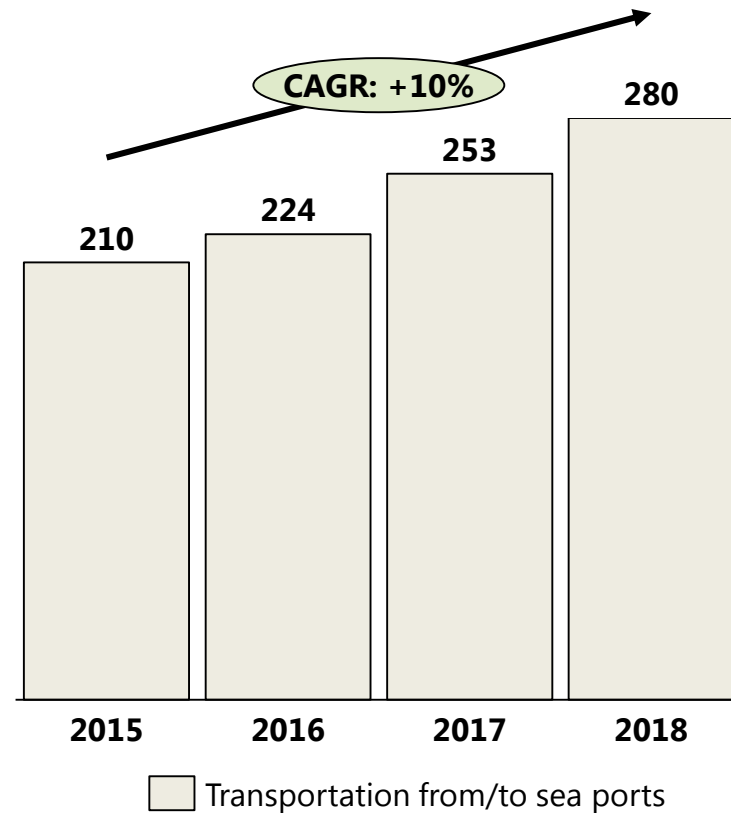
# 04

The volume of transport from and to seaports exceeds The New Silk Road, but traffic from and to China is growing at the highest rate

*Transshipment of UTI in LC Małaszewicze  
[000' UTI] \**



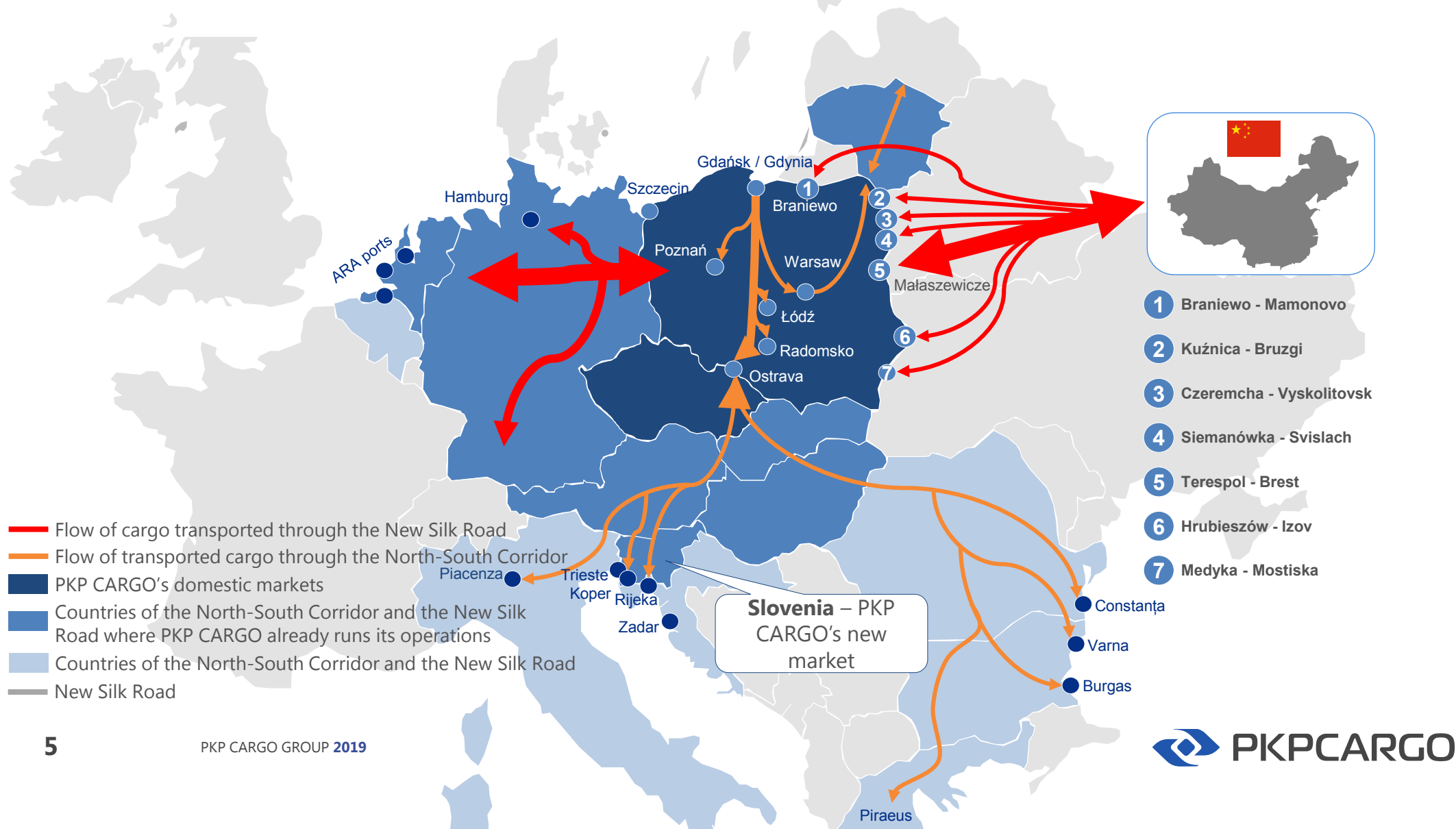
*Transportation from/to sea ports in  
Poland [000' UTI]\**



\*based on PKP CARGO data

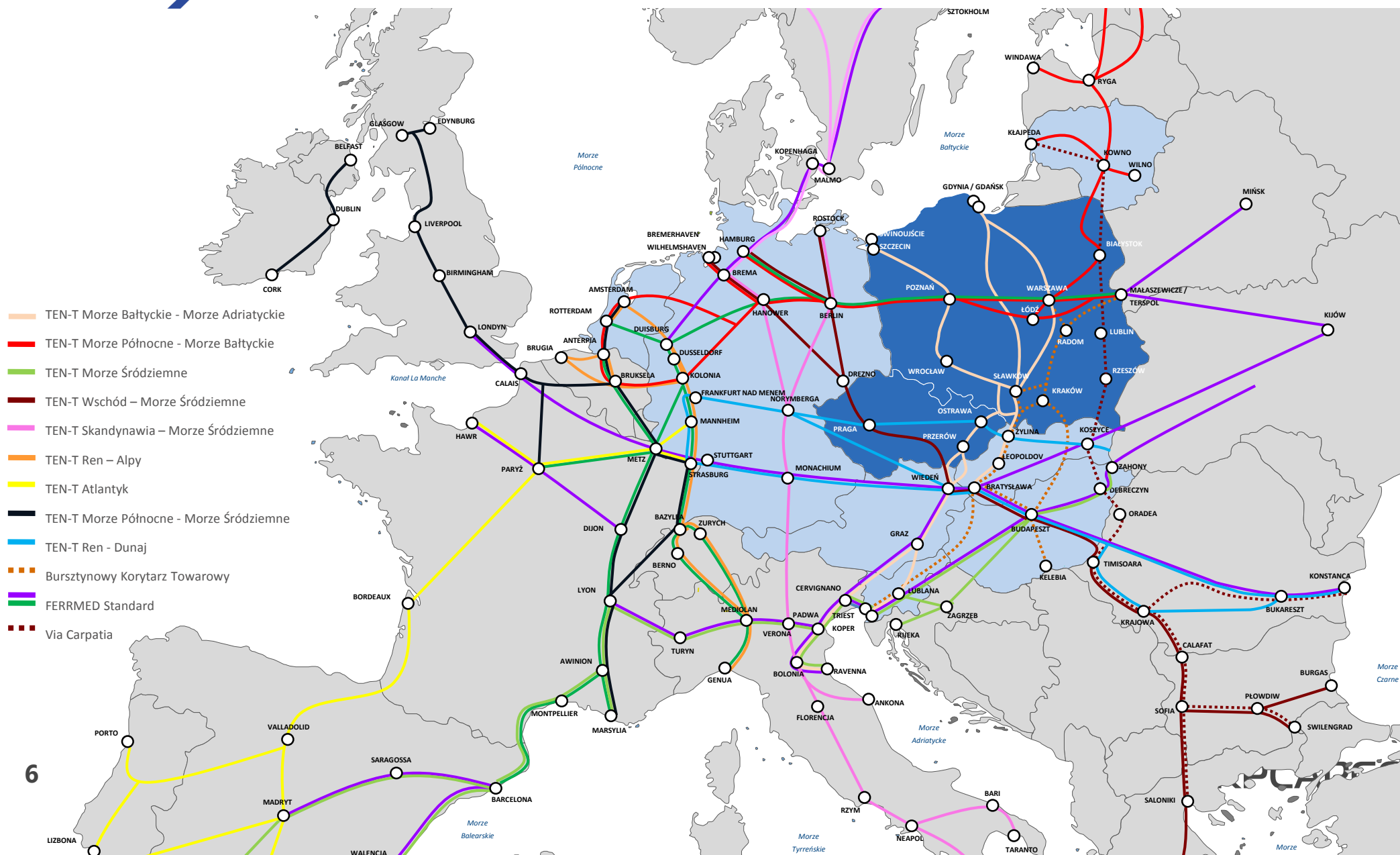
# 05

Due to its unique location at the intersection of major trade routes in Europe, Poland has a chance to become a transport and transshipment hub on The New Silk Road





A number of key European rail routes run through Poland, the most important being the East-West and the Baltic-Adriatic

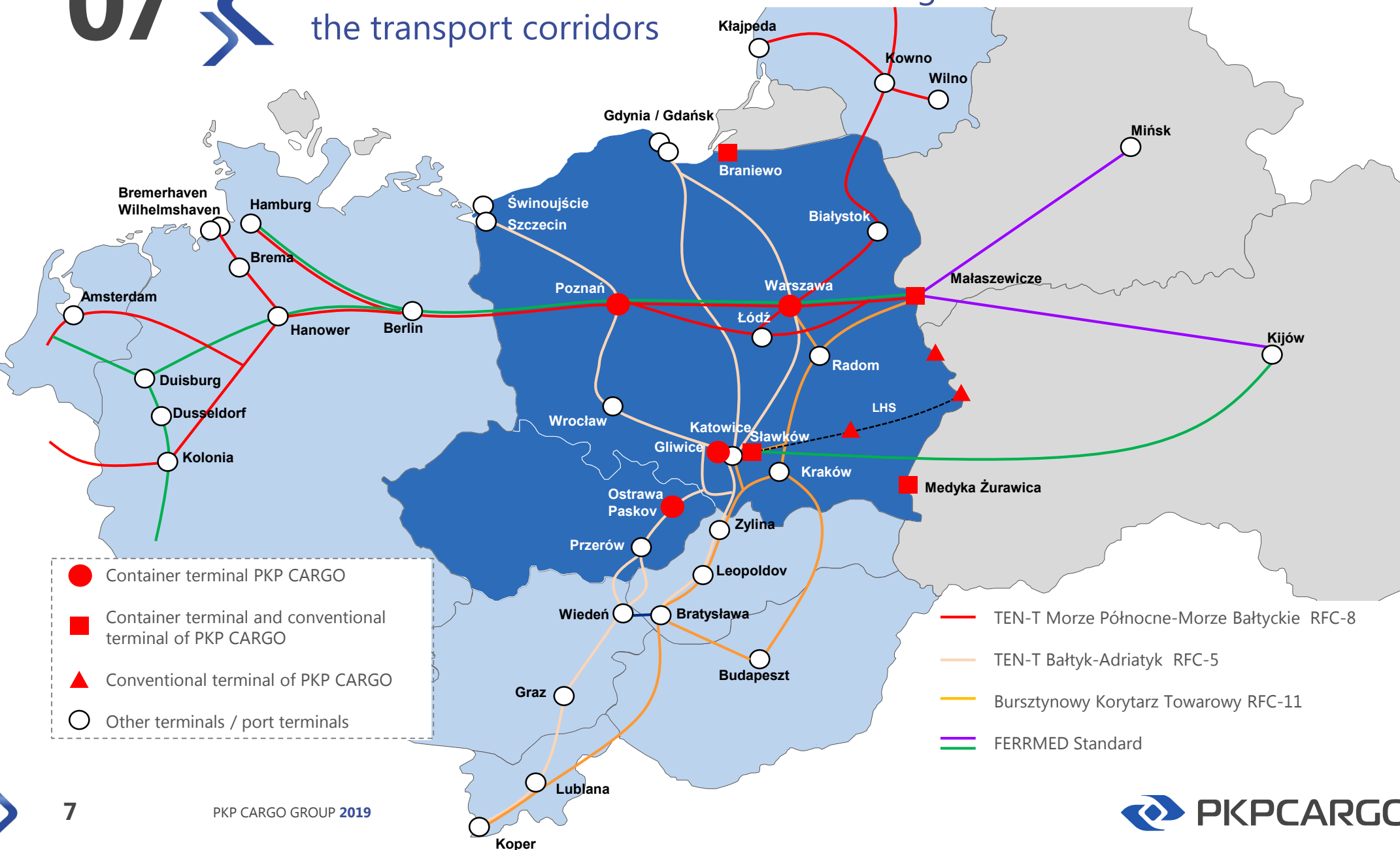




07



The PKP CARGO terminals have a strategic location in relation to the transport corridors





# 08

The PKP CARGO intermodal and conventional terminals allow to service a variety of goods throughout the country

POZNAŃ FRANOWO

 **2,8**

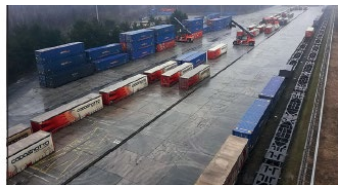
 **117**



GLIWICE

 **6,5**

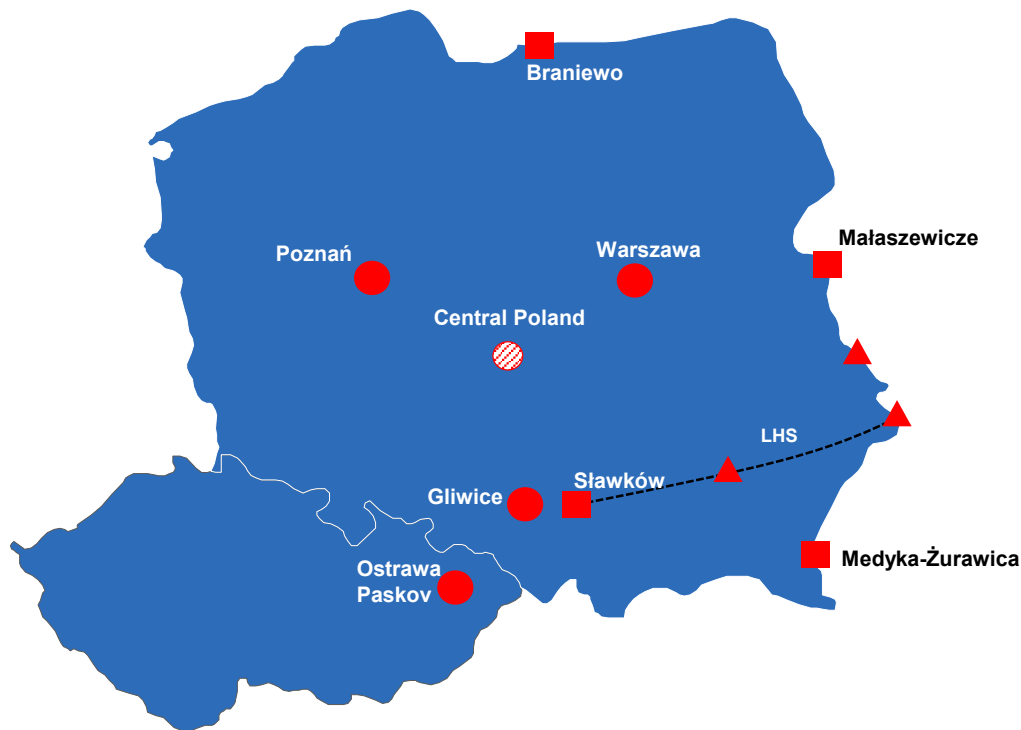
 **128**



OSTRAVA-PASKOV


 **3,1**

 **200**



BRANIEWO

 **8**

 Przewozy Intermodalne ruszyły w V 2018 r.



WARSZAWA

 **3**

 **77**



MAŁASZEWICZE

 **14**

 **223**



SŁAWKÓW

 **91**

 **285**




MEDYKA - ŻURAWICA

 **3**

 **44**


 **Storage capacity [ha]**

 **Maximum annual handling capacity [000' TEU]**

 Container terminal of PKP CARGO

 Container terminal and conventional terminal of PKP CARGO

 Conventional terminal of PKP CARGO

 Planned new terminal

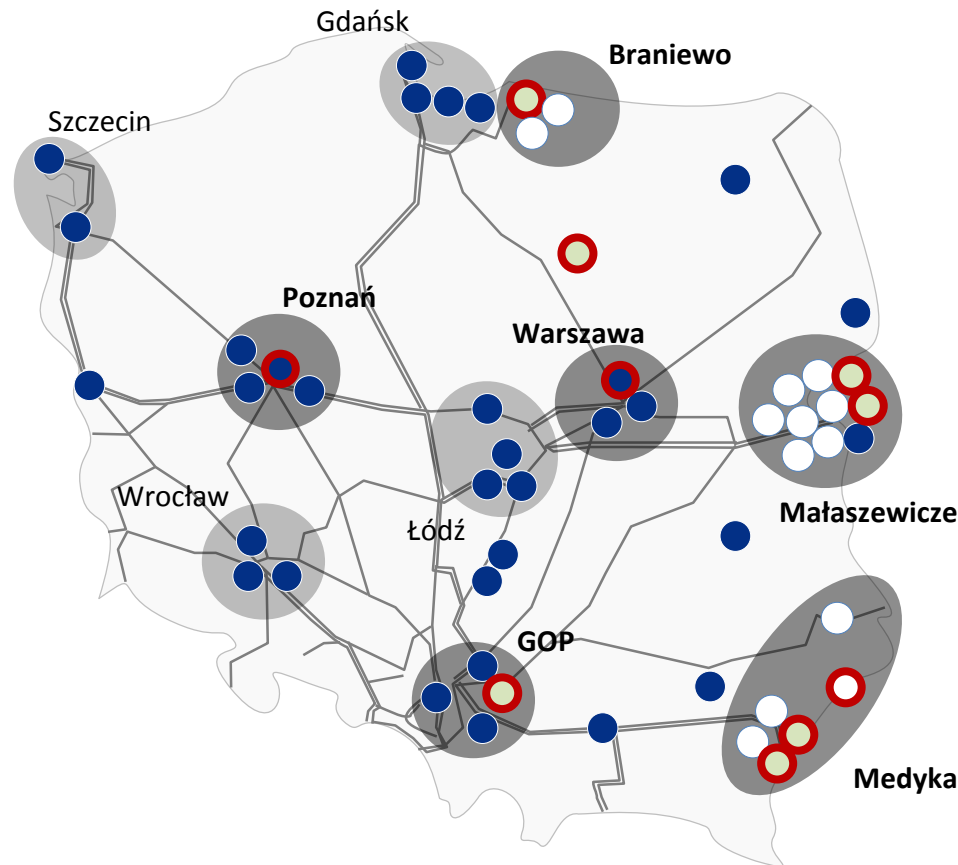
# 09

The PKP CARGO Group has created a new entity PKP CARGO TERMINALE consolidating all terminals from the PKP CARGO Group. It will be the largest terminal player on the Polish market and one of the largest in Europe

## Key figures regarding PKP CARGO Terminals and a map of the largest intermodal and mass terminals in Poland



- ✓ 9 intermodal terminals
- ✓ 16 conventional terminals
- ✓ 3 terminals with combined conventional and intermodal functions
- ✓ Total reloading capacities of mass terminals at the level of **16,2 mln tonnes**
- ✓ Total intermodal terminals handling capacity at the level of **1 074 thousand TEU**
- ✓ **235 ha** total area of land
- ✓ **168 ha** of terminal area



### Legend

- PKP CARGO Group terminals
- Intermodal logistics centre
- Intermodal-mass logistics centres
- Mass logistics centres
- Competitive area with the Group's terminal
- Competitive area without the Group's terminal

The Małaszewicze border terminal belonging to PKP CARGO supports as much as 94% of total transshipment generated at the EU border by NJS

## The key importance of the terminal in Małaszewicze

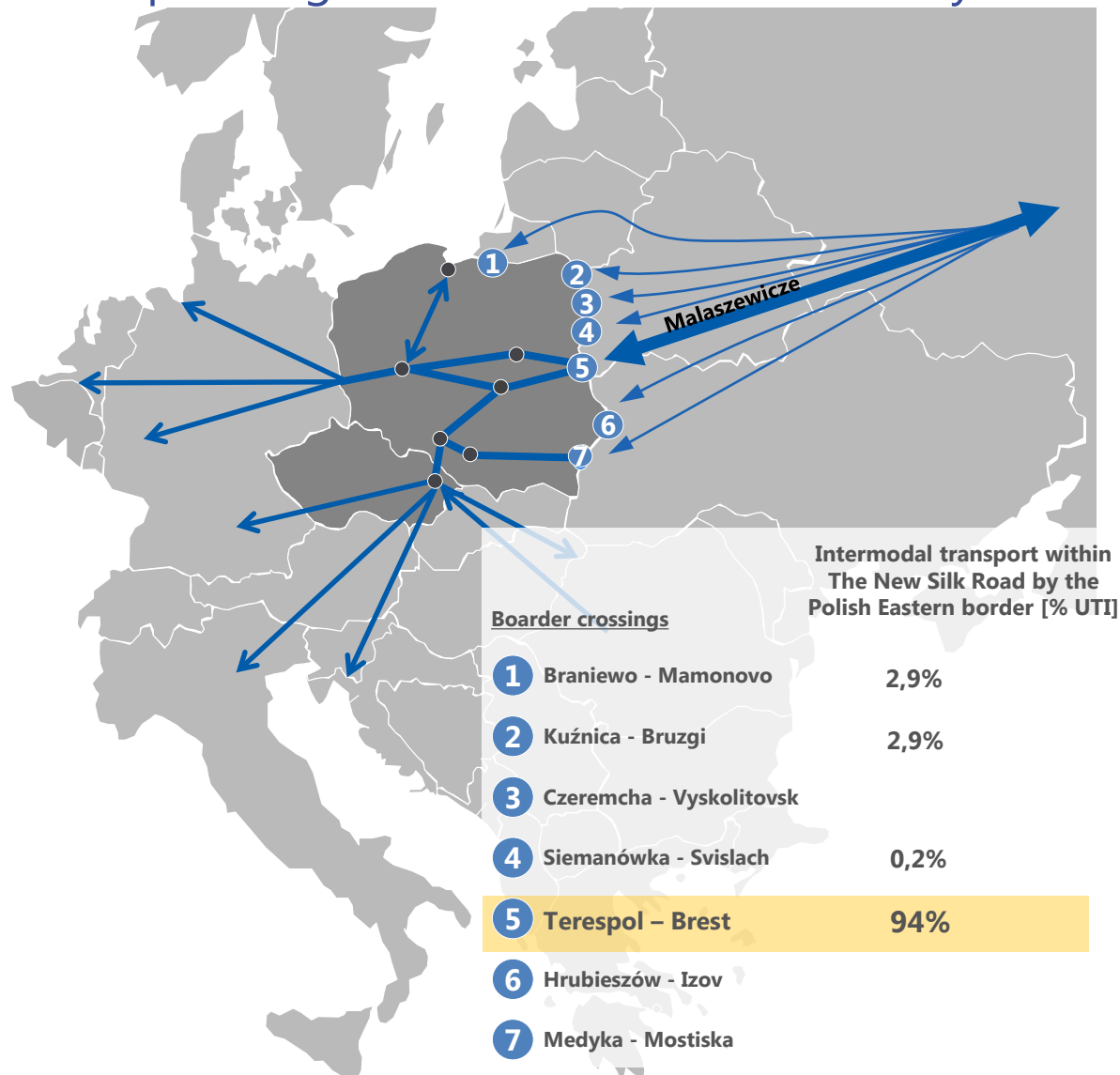
- ▶ **The terminal in Małaszewicze is the largest dry port in Europe**, located at the junction of 1520mm and 1435mm tracks
- ▶ **Significant development potential** - a key location on the New Silk Road

## Flows of goods at crossings on the eastern border

- ▶ **94% of container trains from The New Silk Road go to Małaszewicze** for transshipment
- ▶ **In the IV Q 2019 the Czeremcha - Vyskolitovsk crossing will be started**, which will relieve the Terespol - Brest crossing (distance about 45 km)

## Movement of flows of goods

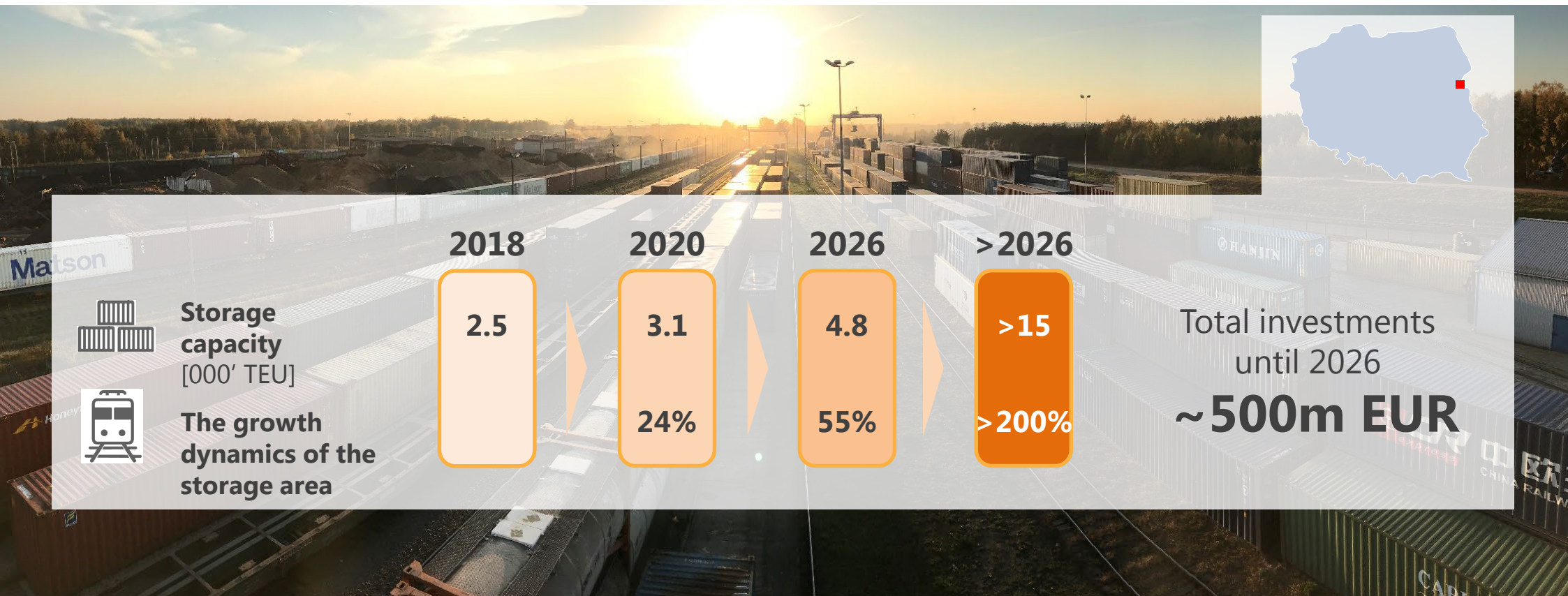
- ▶ **Ca. 75% of TNSR depots** crossing the Polish border **are transit to Western Europe**
- ▶ **The remaining part goes to** the hub of containers in **Łódź Olechów**, from where it is further transported



Data for 2018



Logistics Centre Małaszewicze - container terminal is one of five terminals, key on the European section of TNSR





The terminal in Geniusze is a new investment supporting the European episode of TNSR



The PKP CARGO Group builds its future on the intermodal market by developing a modern rolling stock base

## INVESTMENTS IN ROLLING STOCK

2019-2022

nb.

	2019	2020	2021	2022
Intermodal platforms	133	400	428	278
Lokomotives	70	50	45	17

PLN 300 million co-financing from EU funds



Thank you for your  
attention







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To obtain additional information about PKP CARGO, please contact the  
Development, Investor Relations and Marketing Department:

**PKP CARGO S.A.**

Development, Investor Relations and Marketing Department  
ul. Grójecka 17  
02-021 Warsaw

Telephone: +48 22 391-47-09

Fax: +48 22 474-29-53

e-mail : [relacje.inwestorskie@pkp-cargo.eu](mailto:relacje.inwestorskie@pkp-cargo.eu)