

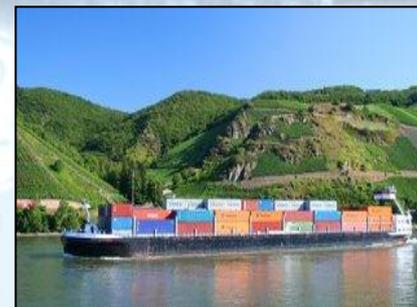
**Hatay International Logistics Conference
18-19. October 2012**

**Logistic Villages in Germany
and their Design Essentials**

Uniconsult

Universal Transport Consulting GmbH

Hartmut Beyer
Managing Director



UNICONSULT Universal Transport Consulting is a subsidiary of Hamburger Hafen und Logistik AG (HHLA)

- € 1.217 billion sales in 2011 – one of the largest port, intermodal, and logistics operators in Germany
- € 207m EBIT in 2011 (EBIT margin 17,0%)
- +14.0% sales and +7.3% EBIT over 2010

Consulting Group of HHLA

- UNICONSULT Universal Transport Consulting GmbH (Intermodal Transport)
- HPC Hamburg Port Consulting GmbH (Port Planning, Operations and IT)
- HPTI Hamburg Port Training Institute (Training on Transportation)



Transport Modes

Rail Transport

Road Transport

Maritime Transport

Inland Waterway
Transport

Air Transport



Services

Market Analysis

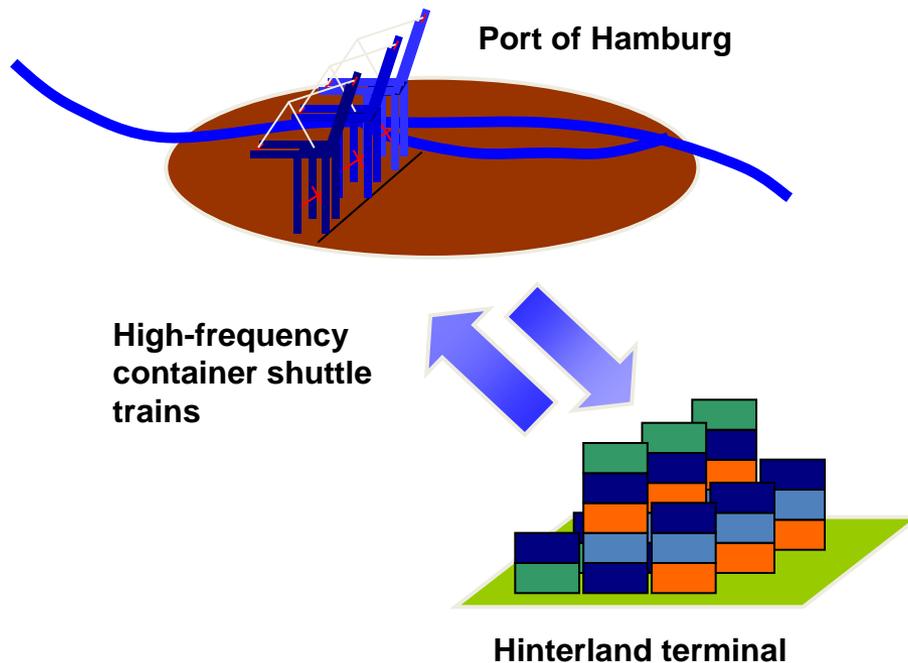
Infrastructure Layout

Process Design

Economic Analysis

Public Co-Funding (EU)

Hinterland gateway for improving competitiveness of the Port of Hamburg



Project Definition:

Innovative logistics concept for the identification of additional growth options in the face of limited surface availability in the Port of Hamburg

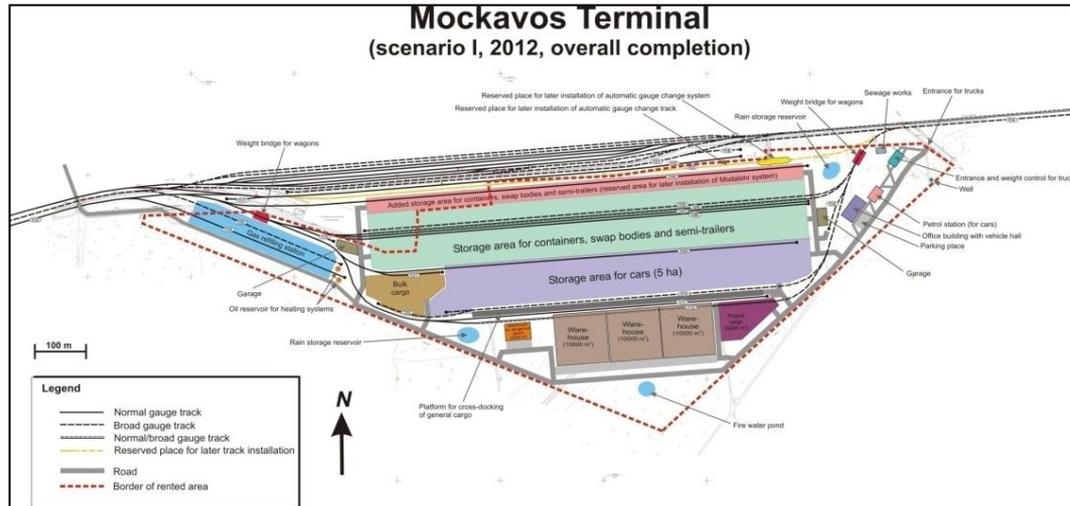
Approach:

- Integration of the various process stakeholders in sea port hinterland logistics
- Determination of the requirements of the participants with regard to
 - Hinterland locations
 - Shuttle operations
 - Logistics processes
- International Best Practices
- Economic feasibility study

Client: Hamburg Port Authority

Project lifetime: October 2008 – August 2009

Feasibility study for a Logistic Village in Lithuania



Project Definition:

Economic feasibility and layout planning of a logistics center with an integrated Combined Transport Terminal at the interface of normal and broad gauge.

Approach:

- Identification of traffic capacities of the relevant European railway system
- Evaluation of the potential cargo volume for the logistics center until 2015
- Intensive local market research to decide the requirements for logistic services
- Development of a terminal layout including infra- and suprastructure equipment as well as the operating concept of the terminal
- Economic Assessment of the project

Client: Private logistics company

Project lifetime: December 2008 – April 2009

Creation of an EU MARCO POLO II- Application for the project „KoKaTrain“



Task:

Development of project idea and elaboration of a project application for the „KoKaTrain“-project within the MARCO POLO II-Programme (EU)

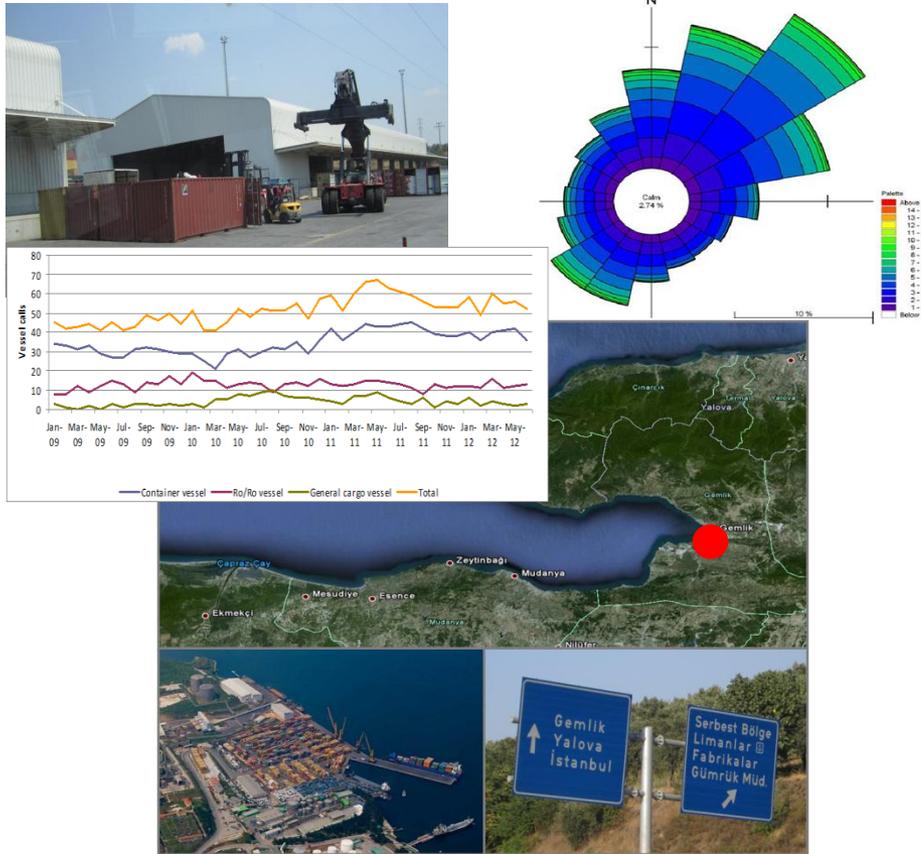
Approach:

- Detailing of the project idea
- Elaboration of a project application
- Cargo volume calculation of possible routes
- Determination of possible amounts of co-financing within different scenarios
- Communication with the EU MARCO POLO II-Secretariat in Brussels

Client: HHLA Intermodal, Hamburg

Project duration: 10/2010 – 05/2011

Due Diligence and Technical Consultancy during the Tender Process for GEMPORT, Gemlik



Task:

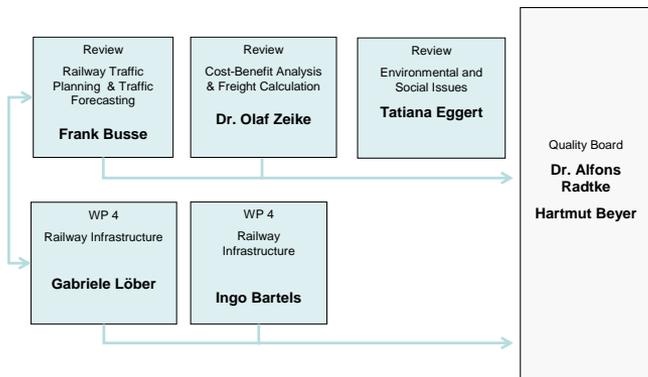
Support of the client within the bidding process for GEMPORT by providing logistical, technical and operational process expertise.

Approach:

- Analysis of current and maximum port capacities regarding all technical and operational major aspects,
- Analysis of operational costs,
- Possibilities for the utilization of the extension area,
- A comprehensive competitive analysis.

Client: OYAK Girişim Danışmanlığı A.Ş., İstanbul
Project duration: 07/2012 – 09/2012

Capacity Needs Analysis of Marmaray Train Operations



Task:

Acting as a quality board for the elaborated reports by different project partners. Support of project's coordinator MCE located in Ankara to ensure that all work packages are harmonized and well sequenced leading to a final result.

Approach:

- Assessment of report contents and methodological approach.
- Assessment of output/conclusion,
- Recommendations on any quality improvements of the report
- Supervision on the overall logical organization of the whole project consisting of different work packages

Client: MCE/ TCDD, Ankara
Project duration: 07/2012 – ongoing

Logistic Villages

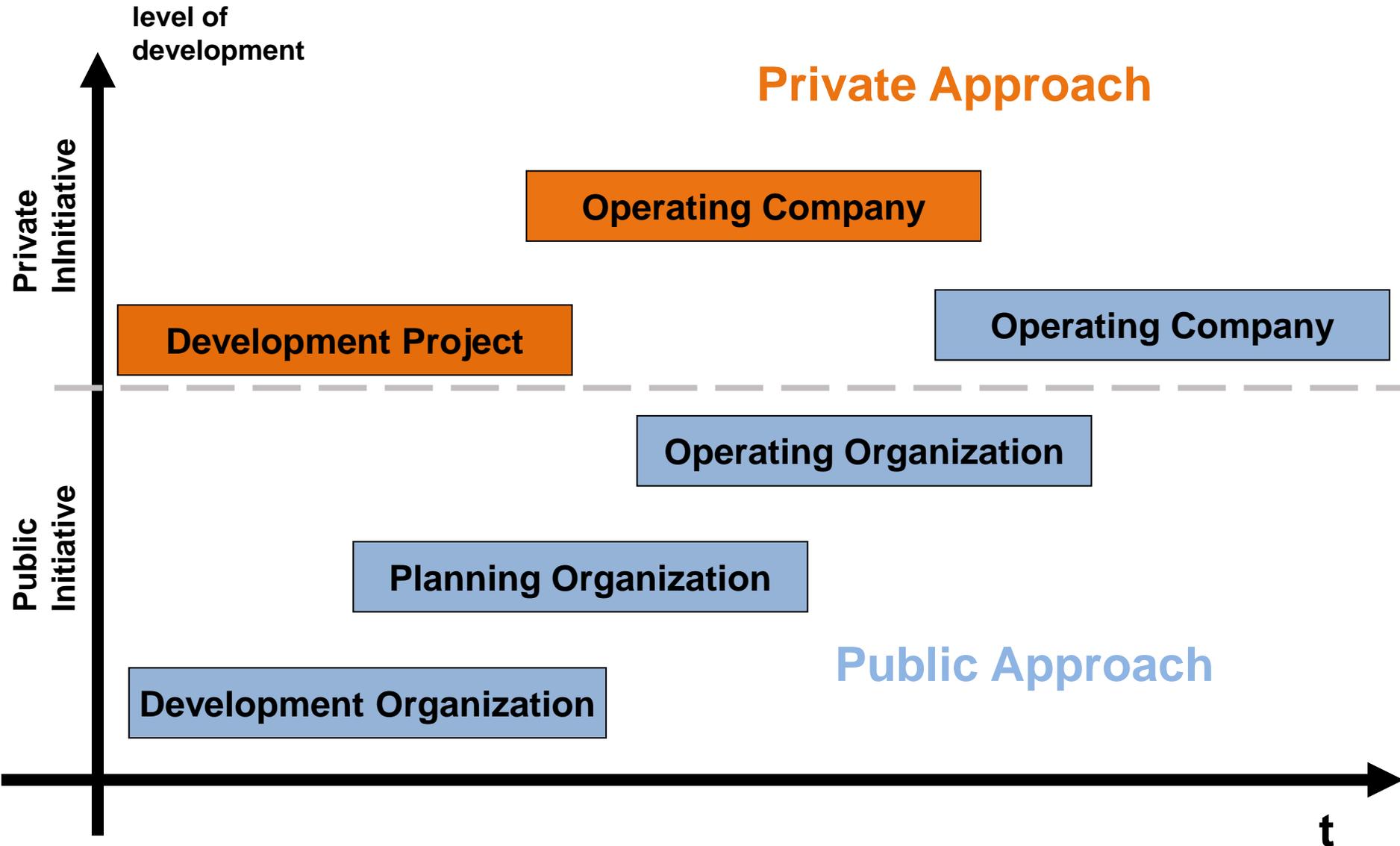
Public Initiative

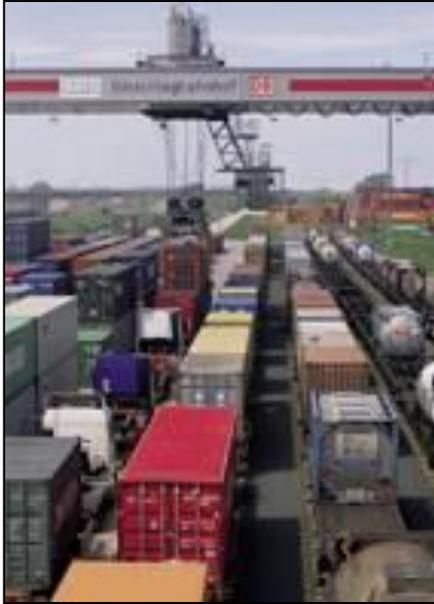
(Regional or National Authorities, State Railway, MOT)

Private Initiative

(Real Estate Comp., Logistic Companies, Manufacturer)

- Areas comprising activities relating to **transport, logistics** and the distribution of goods, both for national and international transit, carried out **by various operators**.
- Provision of **central facilities** (fuelling, restaurants, technical truck services, joint pool for staff and equipment) to generate **synergy effects** to the benefit of all users
- Inter linkage between at least **two modes** of transport (Railway + Road transport)



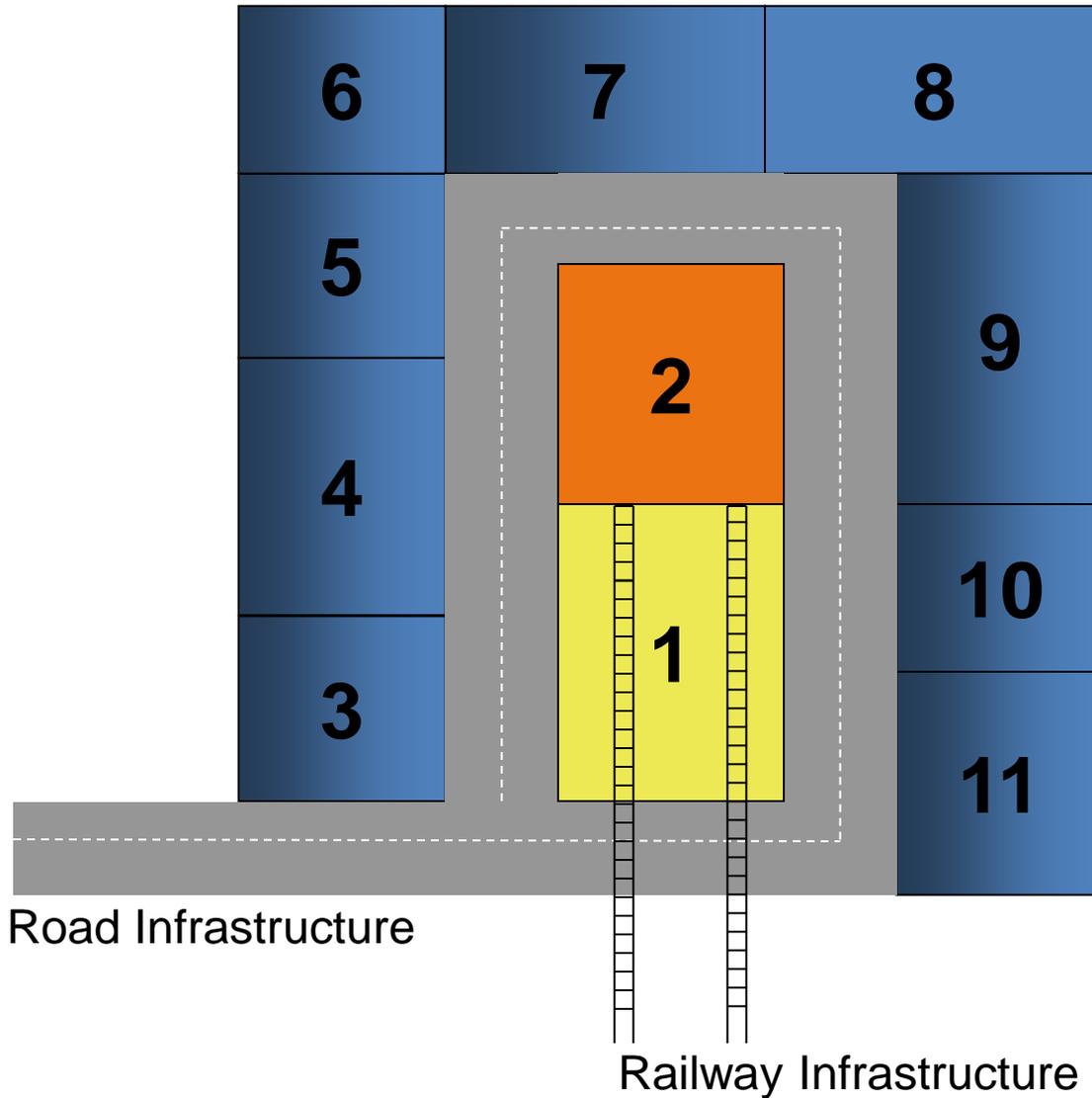


Public Objectives

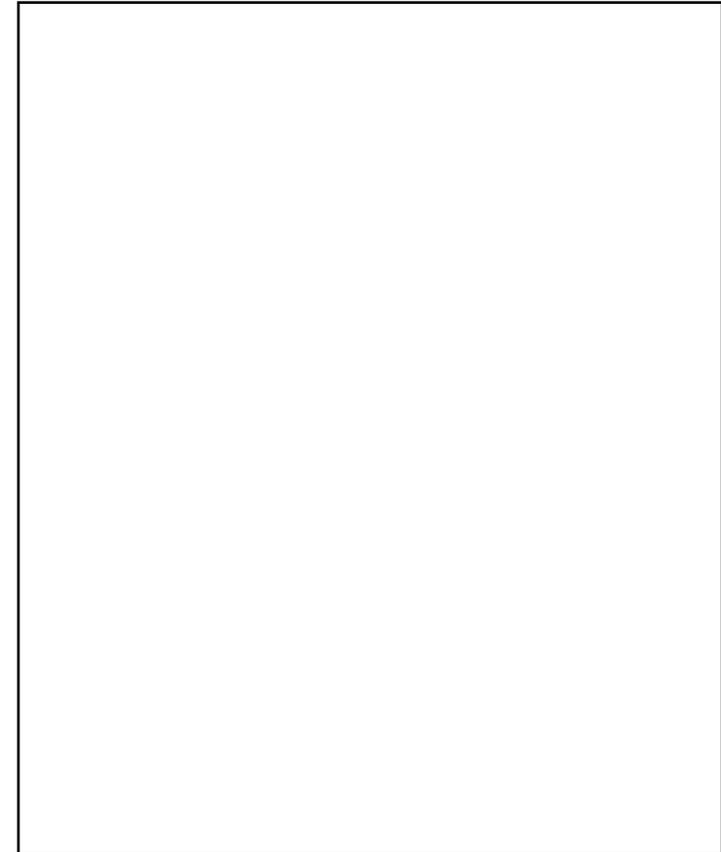
- Relocation of logistics companies from the city centre to outside of the city
- Offering new space for logistics company's site extension and regional economic development
- Shifting cargo transportation from road to rail to reduce CO2 emissions (sustainability)

Private Objectives

- Setting up a commercially attractive investment



Logistic Village



Identification of Market Potential

↳ Selection of Site Location

↳ Dimensioning of Infrastructure/Capacity

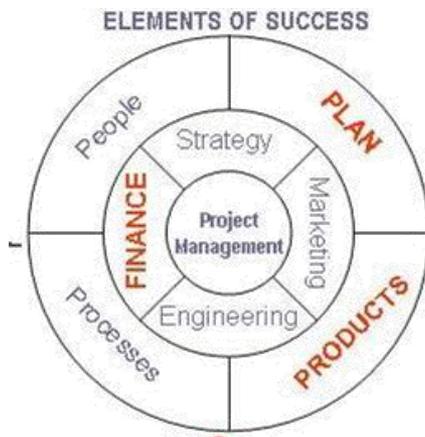
↳ Definition of Layout

↳ Organizational Structure

↳ Business plan

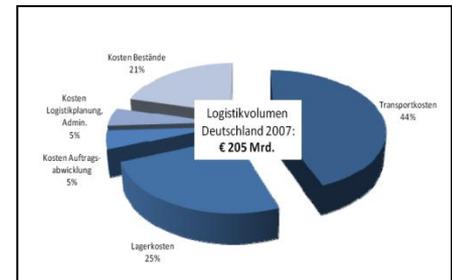
↳ Co-financing application

↳ Implementation



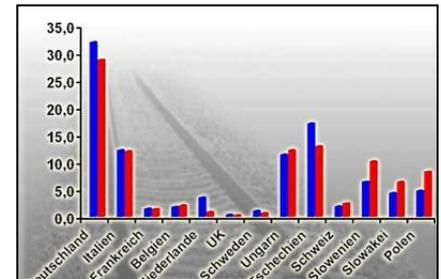
1. Identification of Market Potential

- analysis of companies which look for new sites to set space requirements
- analysis of cargo volumens and handling demand to set viability for intermodal terminal



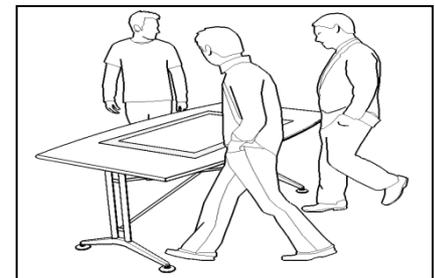
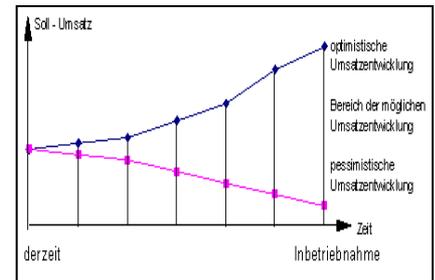
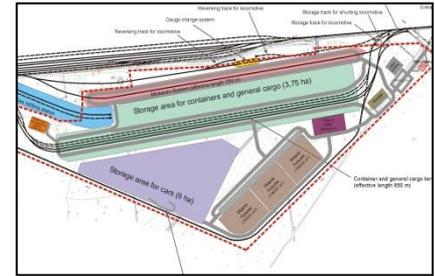
2. Selection of Site Location

- connectivity and accessibility
- availability of land and suitable costs per m²
- option of extension for long-term planning



3. Dimensioning of Infrastructure/ Capacity

- required infrastructure mix
- suitable rail, river and road connection
- optimal combination of basic logistic facilities



4. Definition of Layout

- infrastructure setup (road, rail, utilities)
- operating and storage areas
- location of central services (synergies)

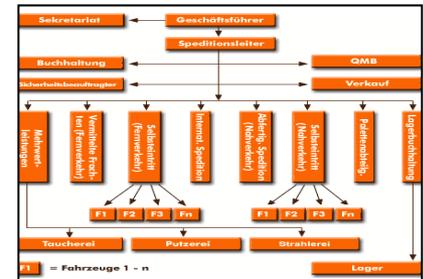
5. Organizational Structure

- public or private institutional setup
- independent development and planning organization
- know-how required: marketing, logistics, economics, local business
- leading to a private operated company



6. Business Plan

- identification of economic parameters and viability
- profit and loss calculation, financial planning
- basis for negotiation about co-financing and partners

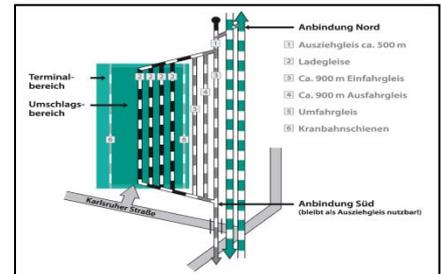


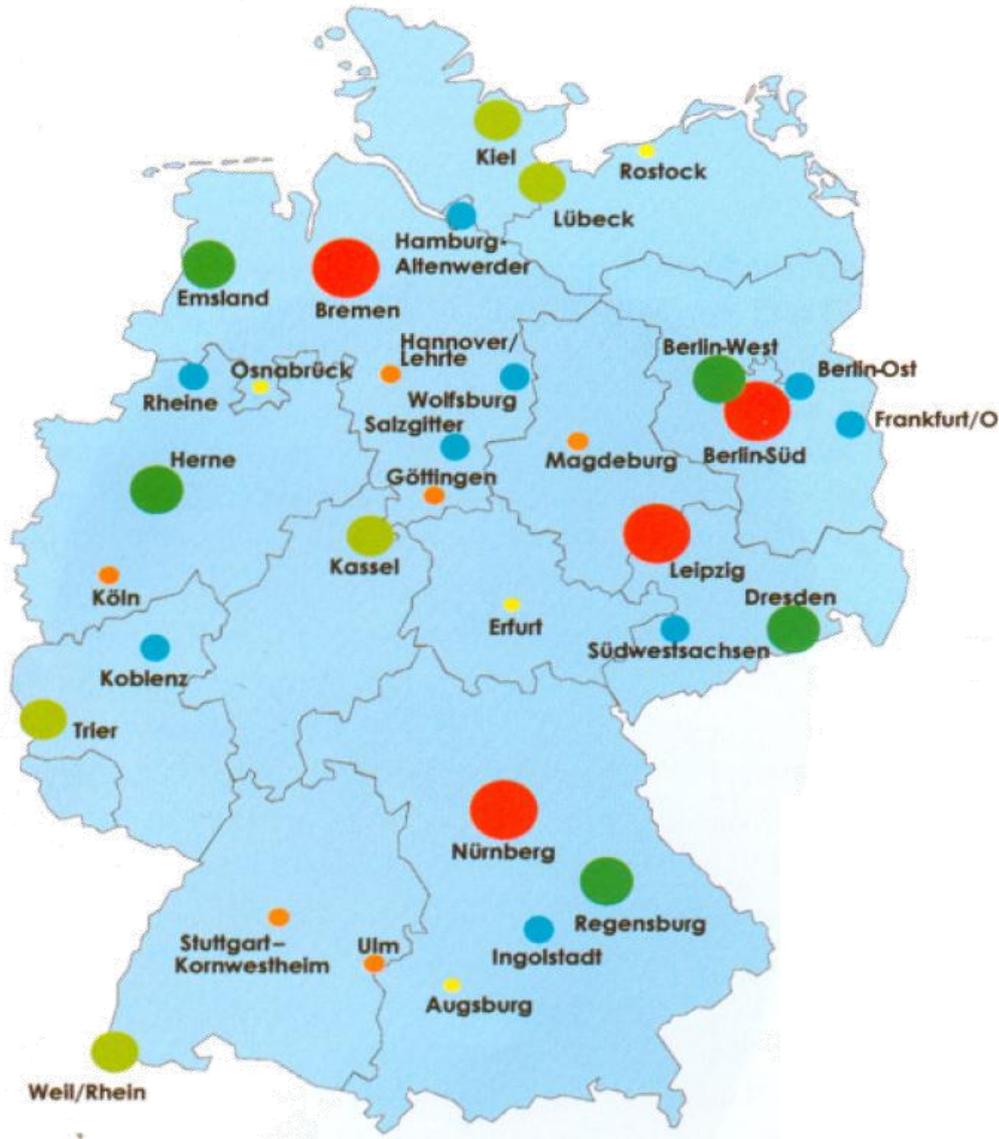
7. Co-financing application

- identification of co-financing programs and national / EU institutions
- preparation of applications

8. Implementation

- setting up development and planning institution
- starting marketing activities
- project and co-financing management





- LEVEL 1 = poor development
- LEVEL 2 = poor to average development
- LEVEL 3 = average development
- LEVEL 4 = average to higher development
- LEVEL 5 = high development
- LEVEL 6 = very high development

The current ranking of Logistic Villages shows how widely spread the range of quality and success is.

Ranking is set on the fulfillment of the actual definition „Logistic Village “ and the dynamic of development.

1. Freight Village Bremen GVZ Bremen GmbH (Best case)



2. Freight Village Erfurt GVZ Erfurt GmbH (Moderate case)



Logistic Village Bremen, Germany (GVZ Bremen GmbH)



Location:

south-westerly city region of City of Bremen

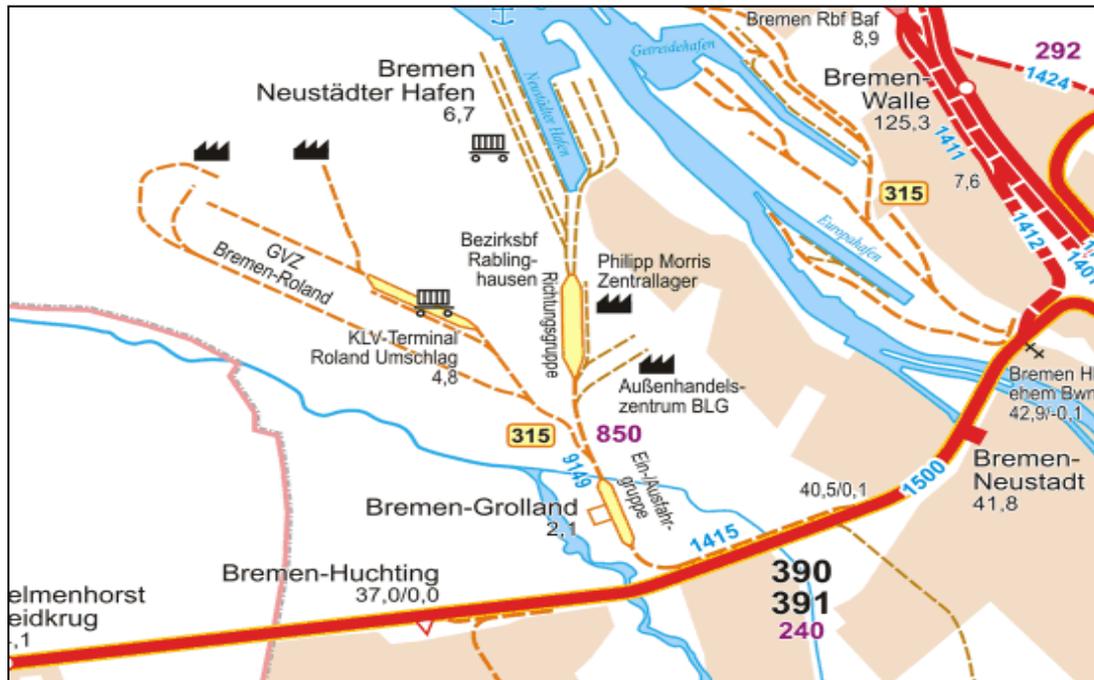
Area:

gross 200 ha; net 150 ha

Distance to:

- 8 km to highway A1 (to Hamburg and Ruhr Region)
- 6 km to highway A27 (to Port of Bremerhaven)
- Rail connection existing
- Intermodal terminal at site
- 3 km to inland waterway (via Port of Bremen)
- 6 km to airport





Strengths

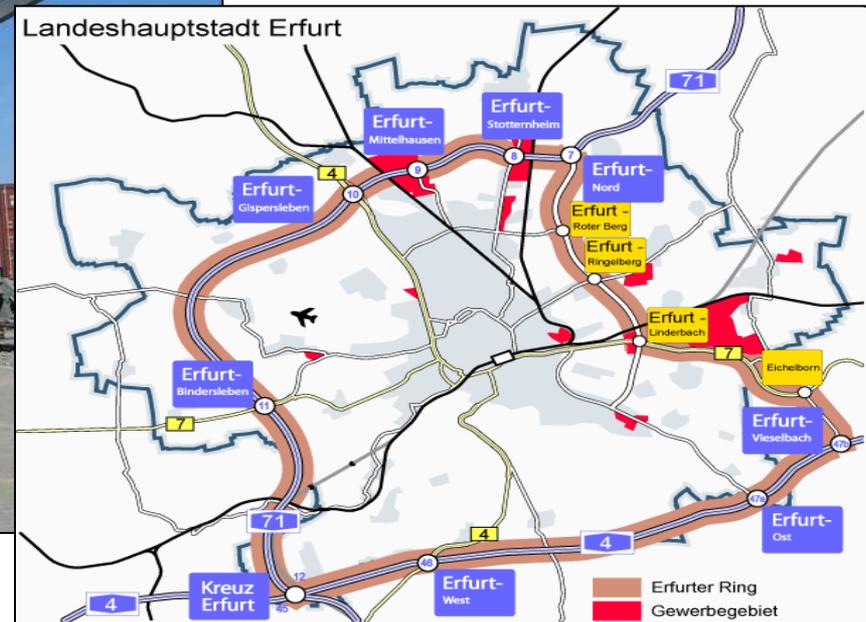
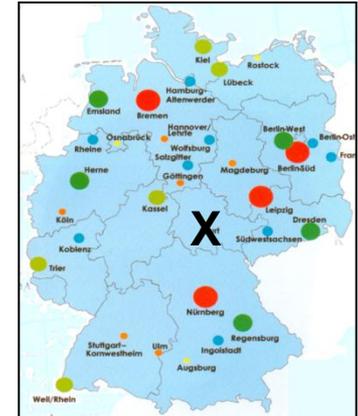
Active promotion of the cargo village development by the public bodies

Strong and active logistic partners contributing with cargo and know how

Close distance to the market - cargo sources and logistic competence Port of Bremen

Good access to transport infrastructure (railroad, motorway, sea and inland waterway transport)

Logistic Village Erfurt, Germany (GVZ Erfurt GmbH)



Location:

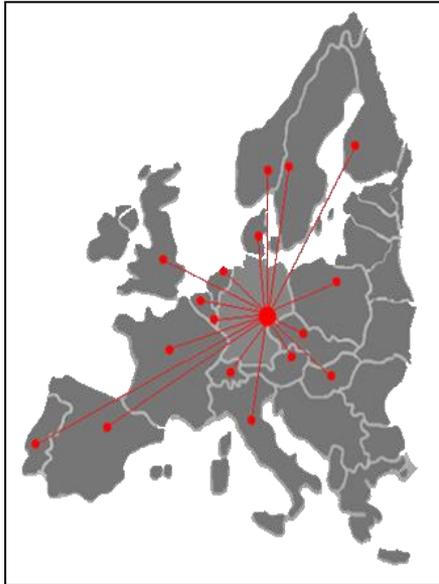
Easterly part of city region of City of Erfurt

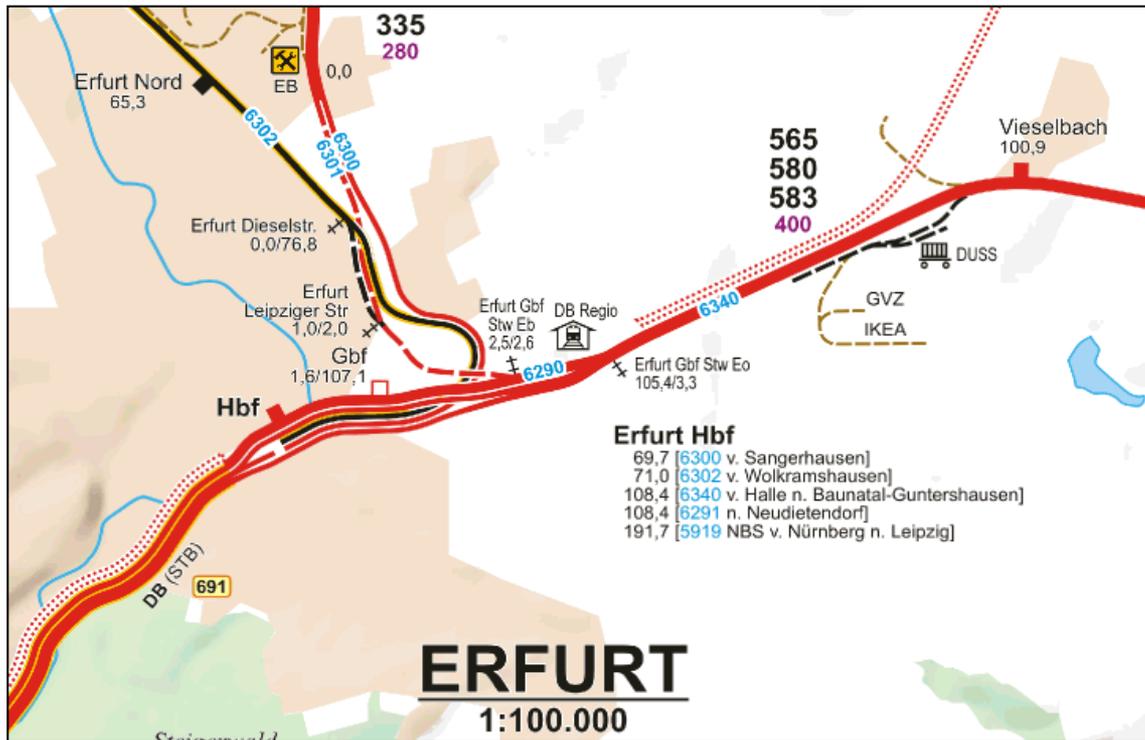
Area:

gross 350 ha; net 280 ha

Distance to:

- 3 km to highway A4 (to Frankfurt and Dresden)
- Rail connection existing
- Intermodal terminal at site
- 8 km to airport





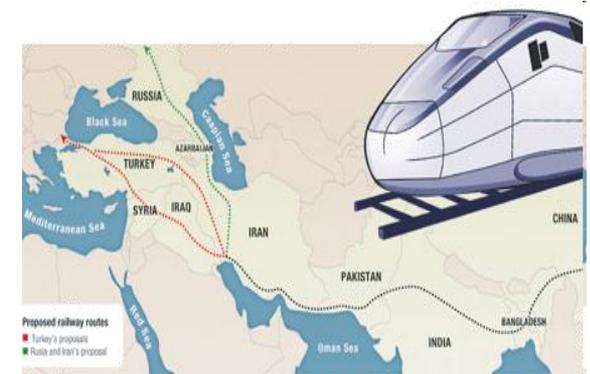
Weaknesses

Moderate marketing activities only to promote the potential of the logistic village

Close distance to other competitive logistic villages (Leipzig)

Not enough market potential to reach minimum threshold of players to generate synergy effects

- Logistics market demand exists - dynamic economy and logistic competences are available
- Large country supports intermodality - (economic operation of rail traffic from 250 km onwards)
- Public interest increases to shift cargo from road to rail transport (sustainability)
- Ongoing modernization of Turkish railway network opens up new services and transport quality
- Liberalisation process of rail traffic opens up access for private operators complementary to public competences to achieve maximum benefits for Turkey's Logistic Industry
- EU Co-financing programmes for Turkish logistic infrastructure available



- Private and Public Initiatives are possible depending on objectives to be achieved with Logistic Villages
- Initiative by public bodies facilitates the project start and engagement by private logistic operators
- Logistic Village requires the intermodality of at least two transport modes (road / rail)
- Logistic Park and Logistic Village – both models can be successful
- Carefull planning, market analysis and marketing is important to ensure success of the investment (for private and public initiators)
- Turkey Logistics Industry seems to have great potential for Logistic Villages
- Co-financing ressources are available from EU Authorities

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