



# New Business Models and Flows - the Future of Transport

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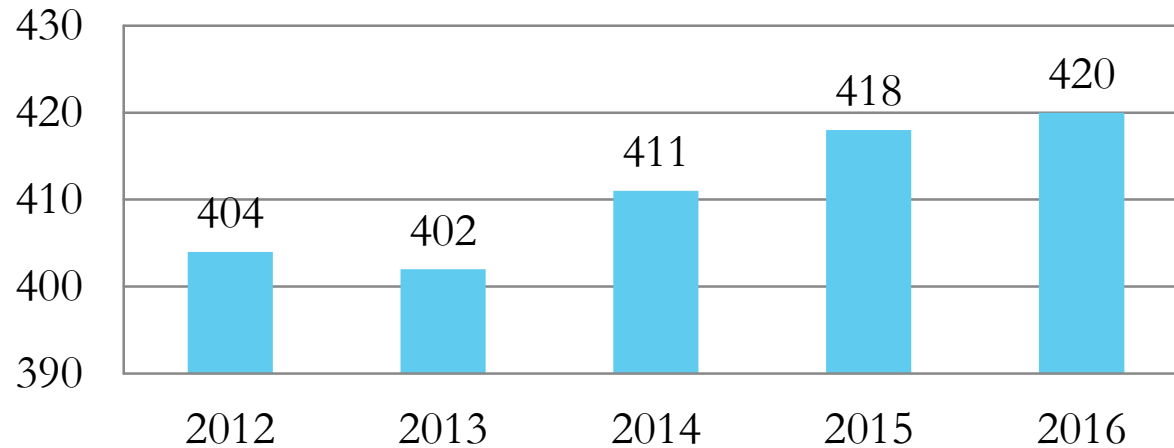
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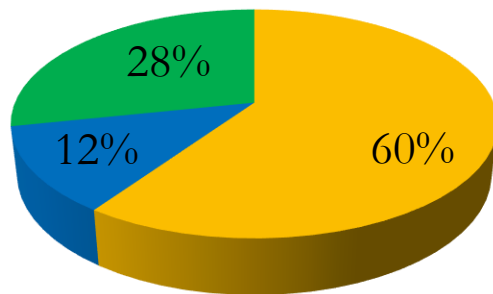
Brussels, 16<sup>th</sup> of May 2018

# Key Highlights - Europe

## Rail Freight Market (bln TKM)



## Rail Freight Market Share (Tkm)



■ Domestic Incumbent ■ Foreign Incumbents ■ New Entrants

## SELECTED KEY POINT

**Rail freight has a market share of 18.3%**

**Incumbent dominated market**

**Multimodality is a need**

# Key Highlights



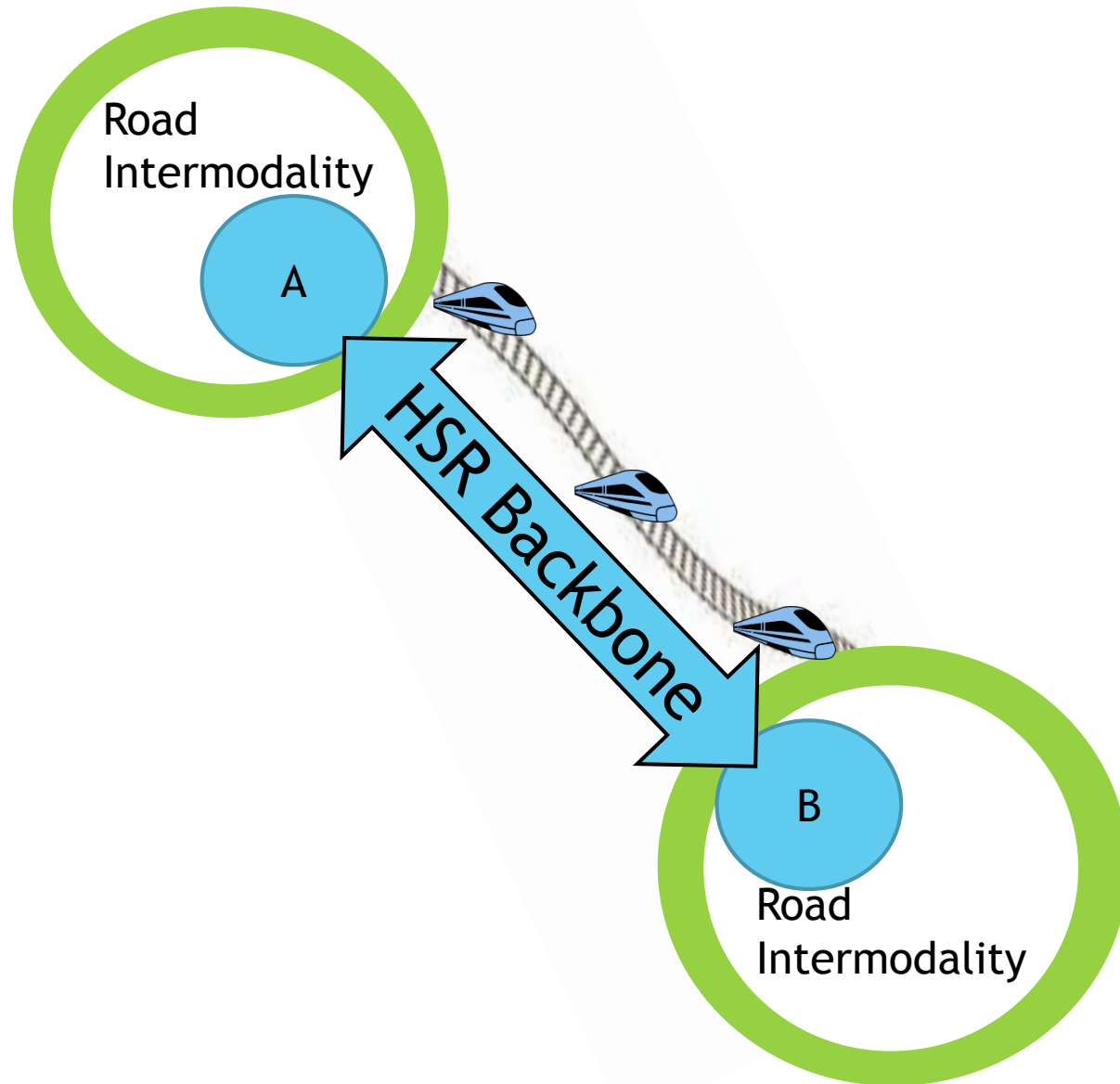
## SELECTED KEY POINT

**Possibility of Freight HSR**

**MKT E-Commerce more than 600 bln Euro at EU level**

**Italian E-commerce close to 25 bln of Euro**

# Key Highlights



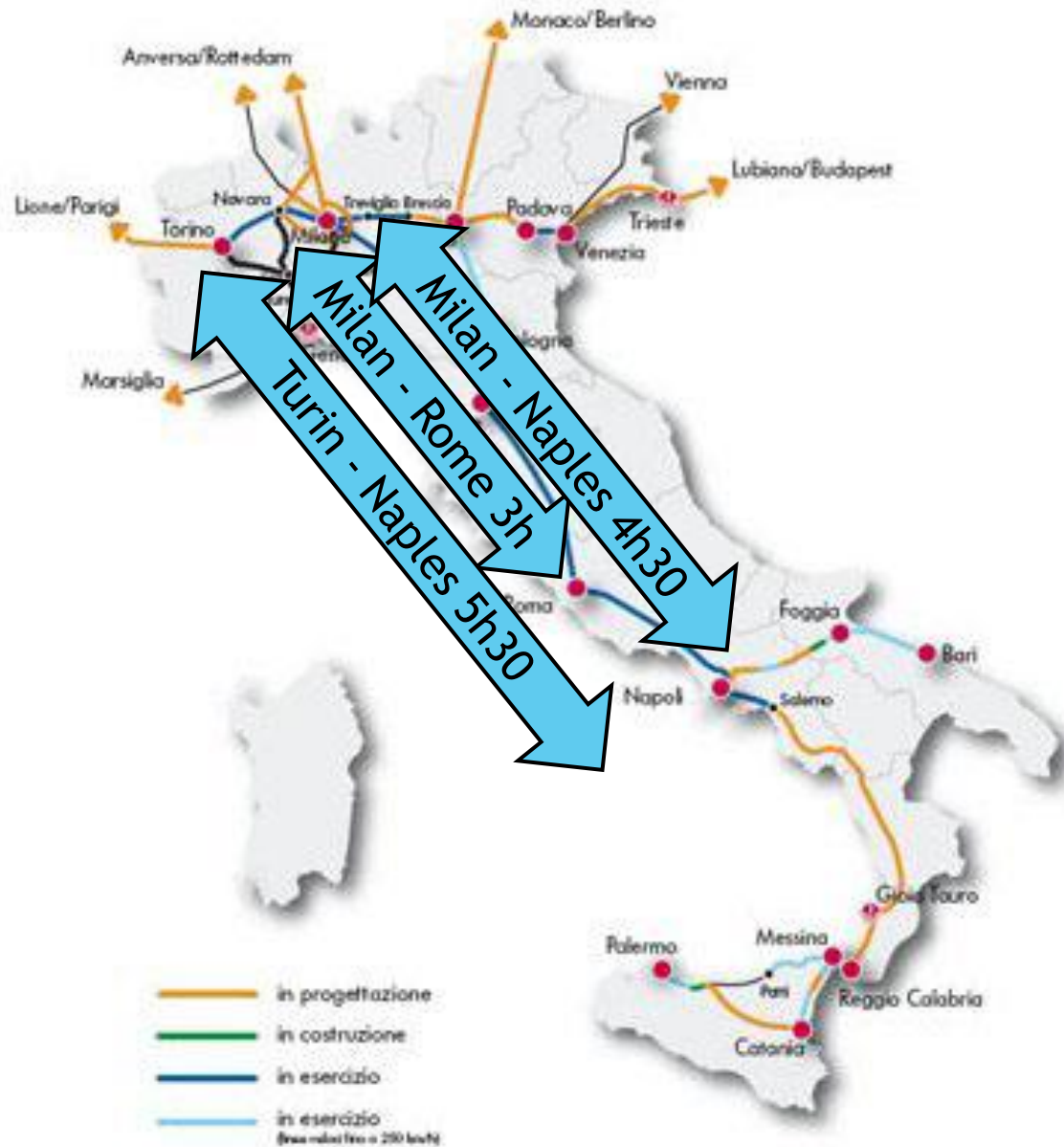
## SELECTED KEY POINT

Vertical integration of the business

HSR backbone

Road distribution from the hub

# Key Highlights



## SELECTED KEY POINT

Night connections

Load of the freight late in the evening

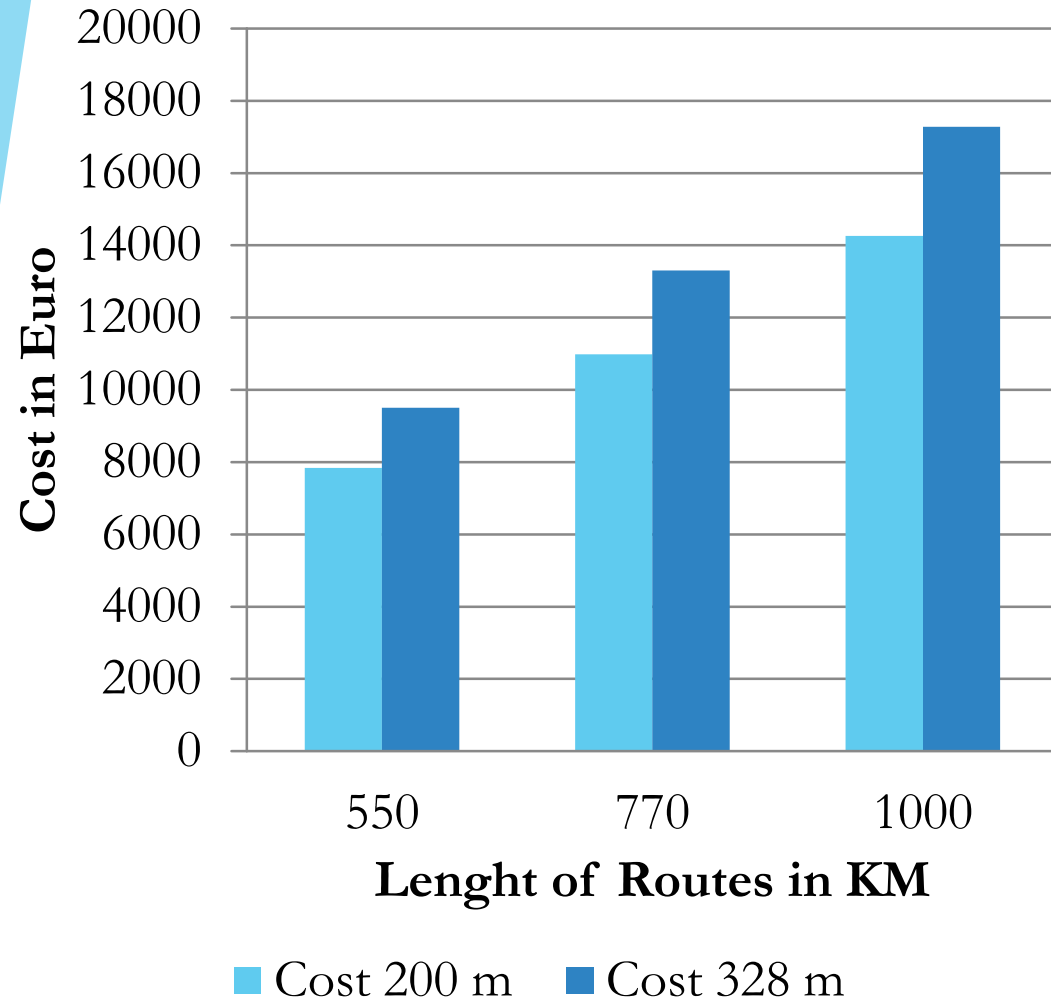
Distribution early in the morning

# Opportunity

- Market time sensitive
- Vertical integration of the value chain
- Multimodality in the hub
- Point to point more and more developed but a strong backbone is needed
- Time to market is a need

# Business Study

## HSR Estimation cost



- Capacity of 2 B747 Cargo
- 18 trucks capacity

# THANK YOU FOR YOUR ATTENTION

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