

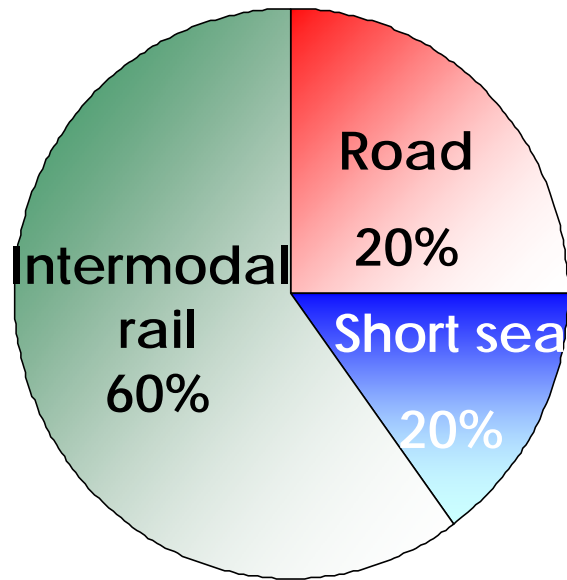
Slovenia and combined transport – For a greener mobility in South-East Europe



UIRR – ADRIA Kombi Conference, Portoroz, 06.06.2008

Bertschi – Market leader in European Chemical Logistics

Intermodal focus



450 Mio € Turnover
 13'000 tank-/silo containers
 1'150 trucks
 1'700 employees in 22 countries
 Europe / Russia

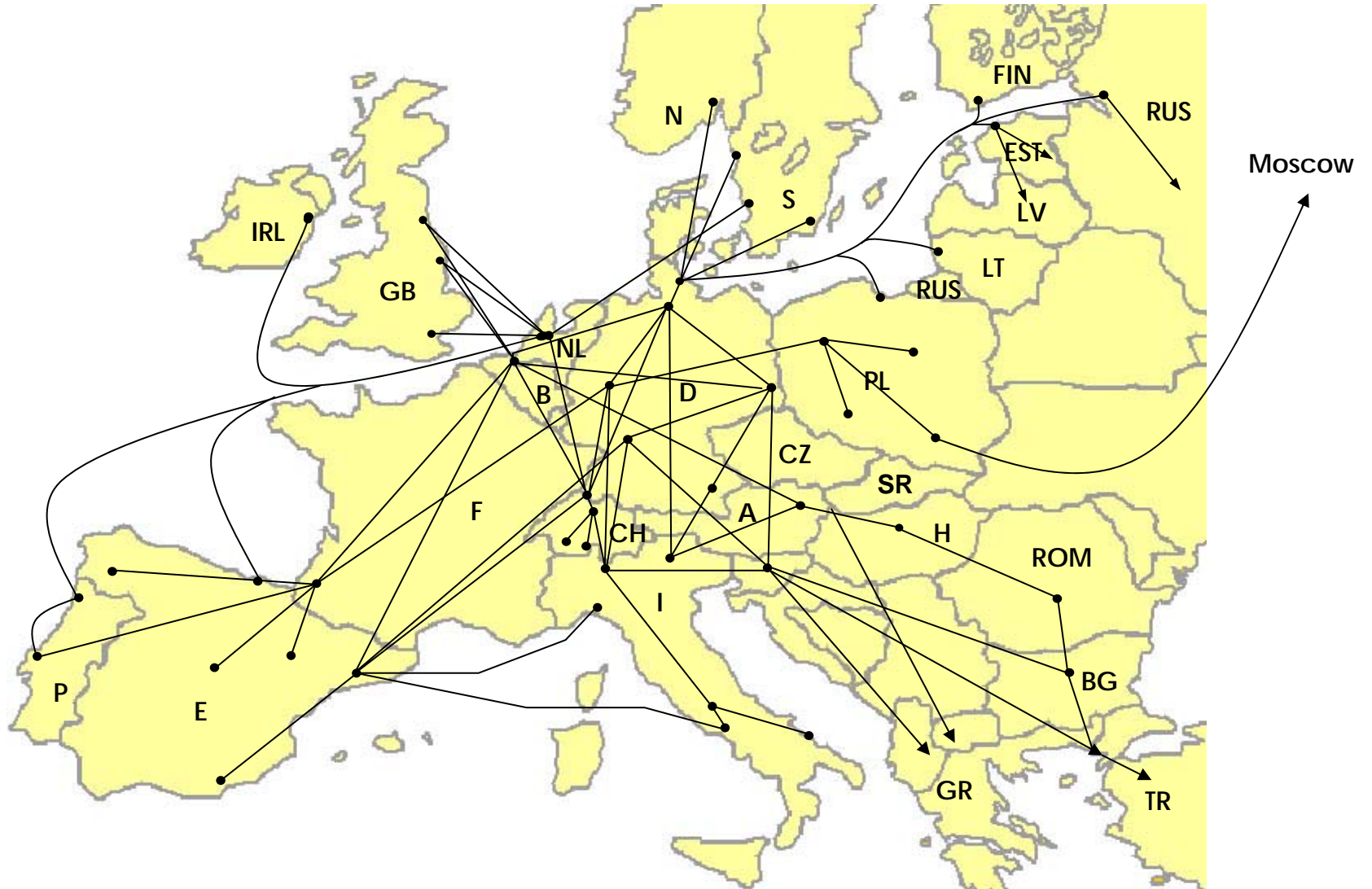
Business units

- Liquids
- Dry Bulk
- Projects
- NB

Key customers



Bertschi – Pan European intermodal network



Bertschi – A high commitment to intermodal solutions

Rail Terminals

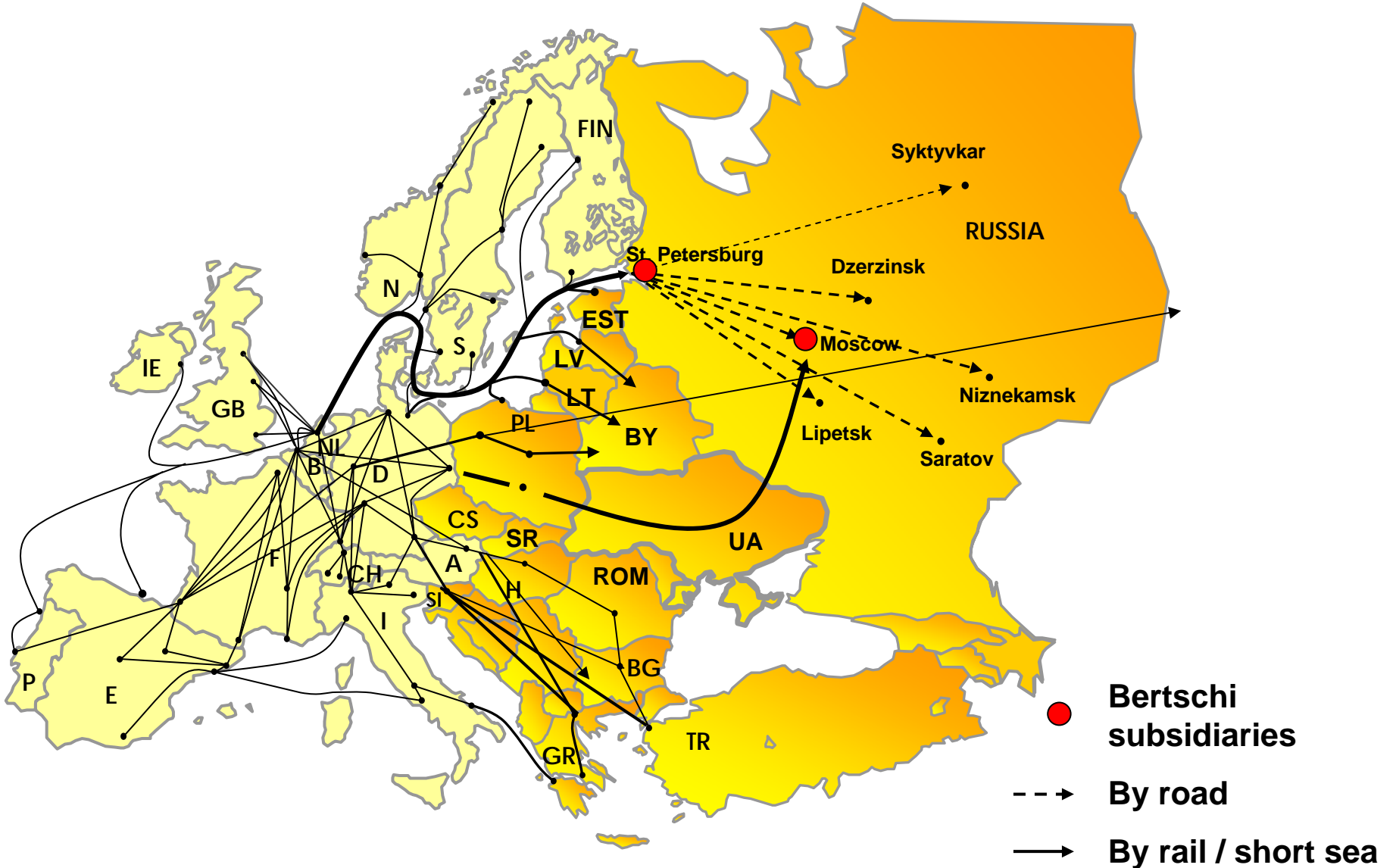
Intermodal Supply Chain Solutions



- Birrfeld (CH)
- Schwarzheide (GY)
- Rotterdam, Terneuzen (NL)

- Monthey, Visp (CH)
- Teeside (UK)
- Tarragona (E)
- Moerdijk, Delfzijl (NL)

Eastern Europe and Russia – Leading intermodal services



South East Europe – Our company strategy



Milestones

- 1996** Ljubljana
“Bertschi Slovenia”
- 2003** Budapest
“Bertschi Hungary”
- 2008** Burgas
“Bertschi Bulgaria”
- 2008** Timisoara
“Bertschi Romania”

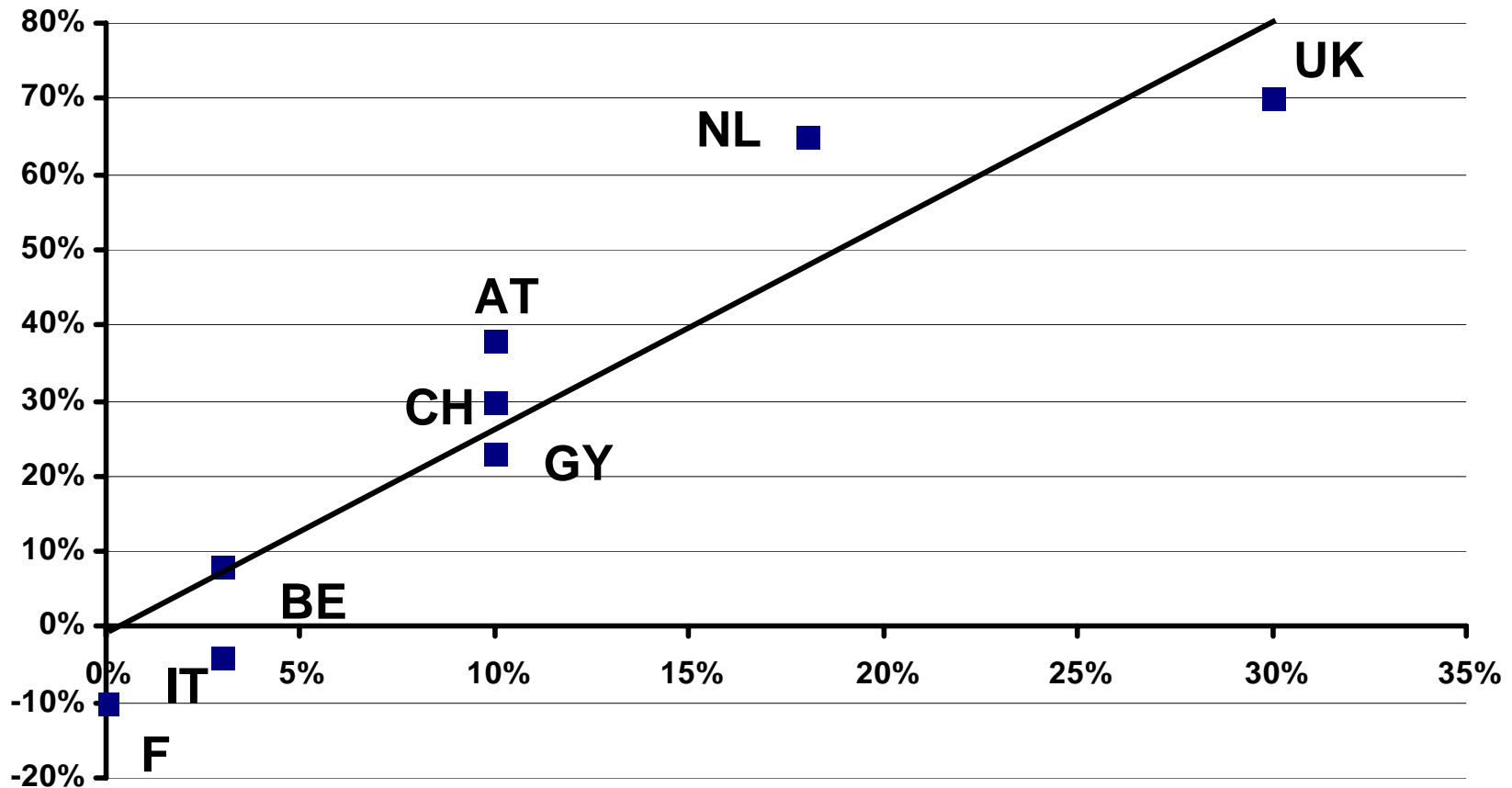
Ljubljana – Gateway to South East Europe

Criteria for Success

- **Crossroad Pan – European corridors 5 and 10**
 - Barcelona – Ljubljana – Kiev
 - Munich – Ljubljana – Istanbul / Athens
- **Rail infrastructure investments**
- **Opening of railway market South – East Europe**
- **Integrated rail traction across borders**

Rail market opening for a greener mobility in Europe

Growth of rail freight (TKm) 1995 - 2004

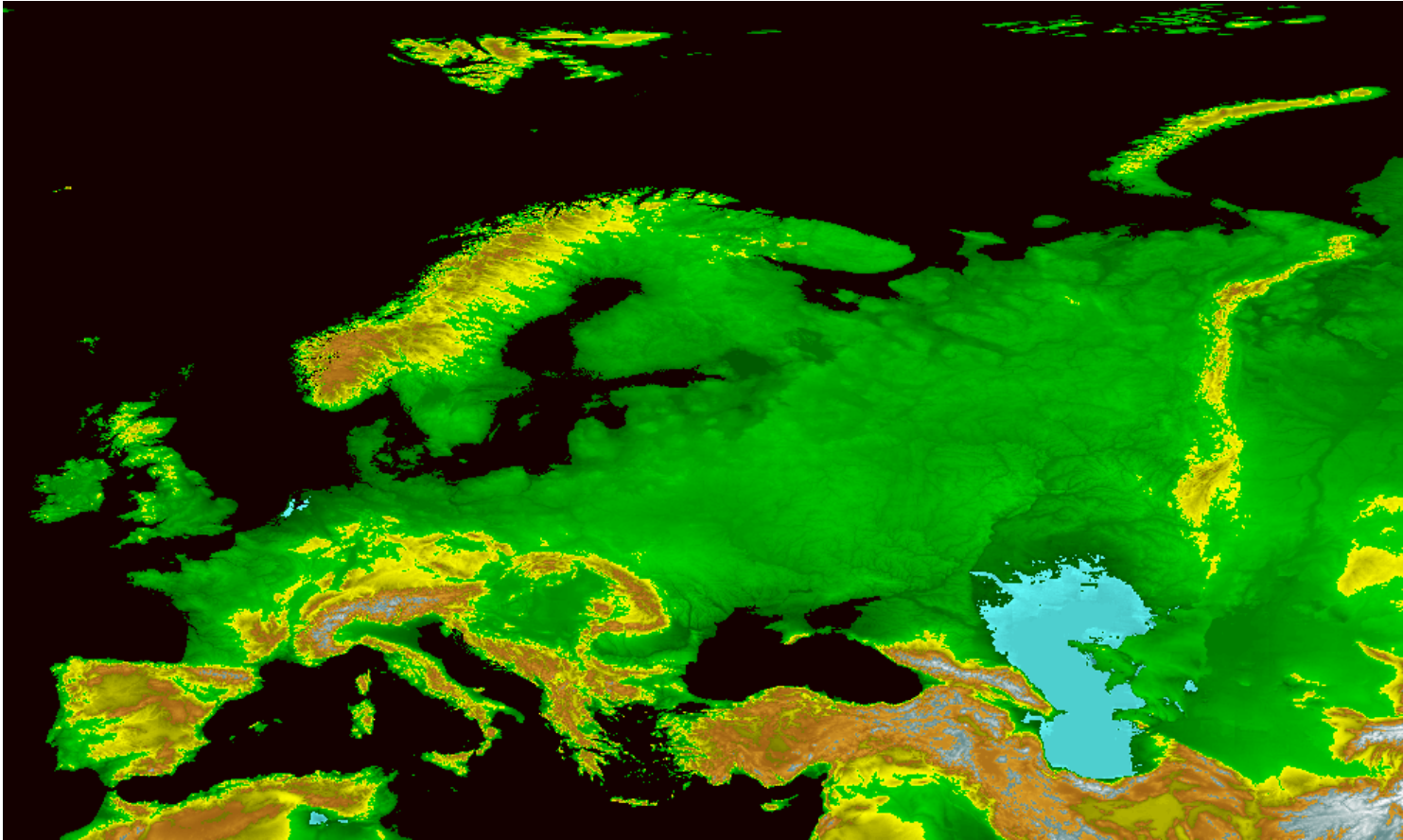


Market share of new entrants (2005)

Conclusions

- Intermodal solutions – a great growth market
- Europe needs 5 to 8 intermodal railways
- Rail market opening → critical success factor
- UIRR companies – promoters of open markets
- Ljubljana – building a gateway to S.E. Europe
- Rail – green solution for the New Europe

The new Europe



- 2-3 days of European supply chain will beat 20+ days from China
- a huge growth market for innovative logistics solutions!