



Connecting Europe: intermodality of Trieste between smart and sustainable logistics

Mediterranean Ports and Logistics 2024, Trieste

Agenda



Trieste: a fast-growing hub for intermodality and sustainability



HHLA PLT Italy and the critical relevance of intermodality for ports



HHLA PLT Italy as a one-stop-shop development opportunity



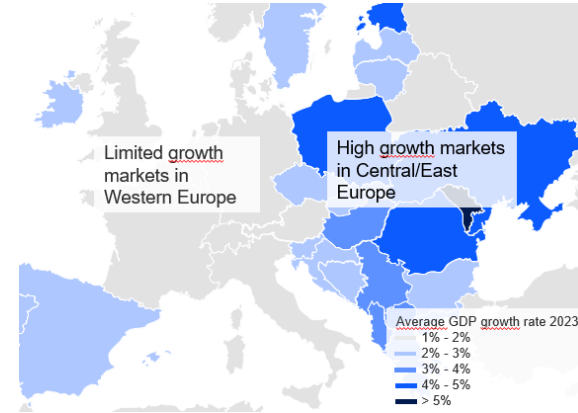
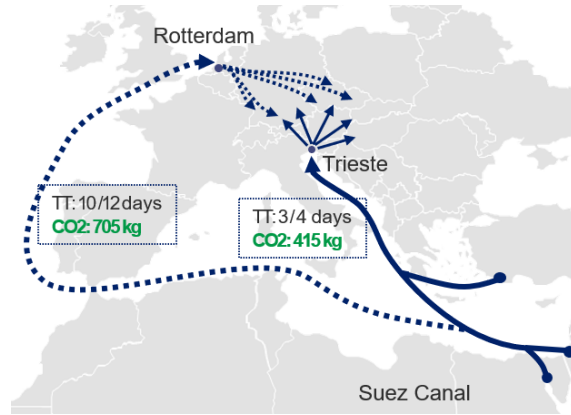
European railway network: a well-developed system comprising Trieste



Current and future investments

Market snapshot of the North Adriatic area

Trieste as key hub for intermodality and sustainability



Gateway to CEE countries

The region is **better positioned** to serve the Mediterranean market with Europe as well as the Far East markets compared to Northern European and Black Sea competitors.

Intermodal network

Since 2014, **train traffic** in Trieste **increased considerably** with a 2014-2019 CAGR of 13.0%. In fact, between 2015 and 2019 the number container trains developed by +151% and the number of Ro-Ro trains by +20%.

The EU wants to **increase the share of rail freight** by 50% in 2030 and by 100% in 2050 compared to 2020 levels on the EU27.

Fast-growing region

The economies in Trieste's relevant hinterland in Central-East Europe are expected to **grow significantly** between in the short-term especially compared to Western European economies.

The North Adriatic offers overall more **competitive** port and terminal charges compared to Northern European ports.

Expansion potential

In the past decade, the Northern Adriatic outperformed all other port regions in increasing its container volumes.

There is an **increased need for extra container handling capacity** in the Northern Adriatic for which the HHLA PLT Italy terminal is a key candidate to facilitate this capacity expansion.

At the same time, **RoRo** segment is expected to remain a **unique and well-established trade** mainly between Turkey and Trieste.

HHLA PLT Italy terminal in Trieste

The only **common user** and **multipurpose terminal** in the **Custom Free Port** area

HHLA PLT Italy in the port of Trieste



- Construction started 2014 as PPP with Port of Trieste,
- On January 7th 2021 official entry of HHLA as majority shareholder and rebranding from PLT into

‘HHLA PLT Italy’



- Terminal focused on:
 - General Cargo in particular aluminum, coils, timber & CFS
 - Project Cargo
 - RoRo
 - Containers
 - Rail
- **Common user terminal, open for all customers**

Aerial view of the multipurpose terminal HHLA PLT Italy in the port of Trieste



HHLA PLT Italy

Developing the one-stop shop concept

Border Inspection Point



Reefer



Custom fwding / CFZ / VAT depot



CFS



Warehousing



Multipurpose terminal



Hinterland Connectivity

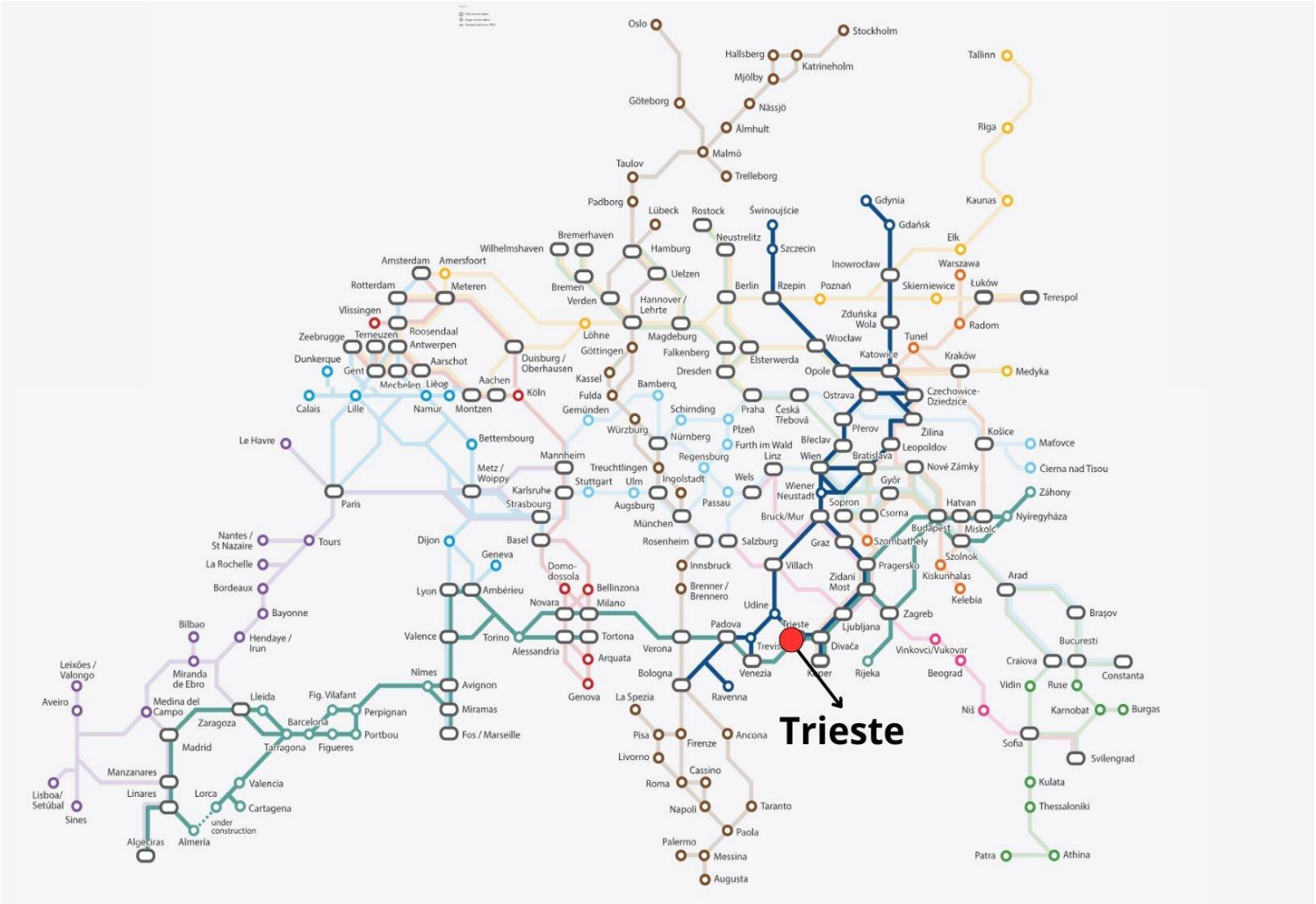
Trieste has excellent rail infrastructures and connections with the main CEE hubs

Rail freight corridors including Trieste:

- **Baltic-Adriatic corridor** linking it with the ports of Poland and many inland terminals and destinations in between;
- **Mediterranean corridor** linking Northern Adriatic ports with Spain, France, Italy, Slovenia, Croatia and Hungary.

Benchmark train cost per TEU (EUR)	Rotterdam	Antwerp	Trieste	Koper
To Vienna	619	593	313	325
To Prague	530	531	420	444
To Munich	463	437	296	321
To Budapest	735	708	345	354
To Bratislava	652	626	332	344

Source: MTBS



Source: Rail Net Europe

Rail gateways from Trieste to Europe

VILLA OPICINA

- **Strategic position** close to the border between Italy and Slovenia, linking towards Villach, Vienna and Budapest
- **Key link** for the Port of Trieste and inland terminals of FVG region with East-European countries



TARVISIO

- **Strategic position** between Italy and Austria for transporting goods through the Alps
- **Key link** connecting the Port of Trieste with important **industrial hubs** of Austria, Germany and other Central-European countries



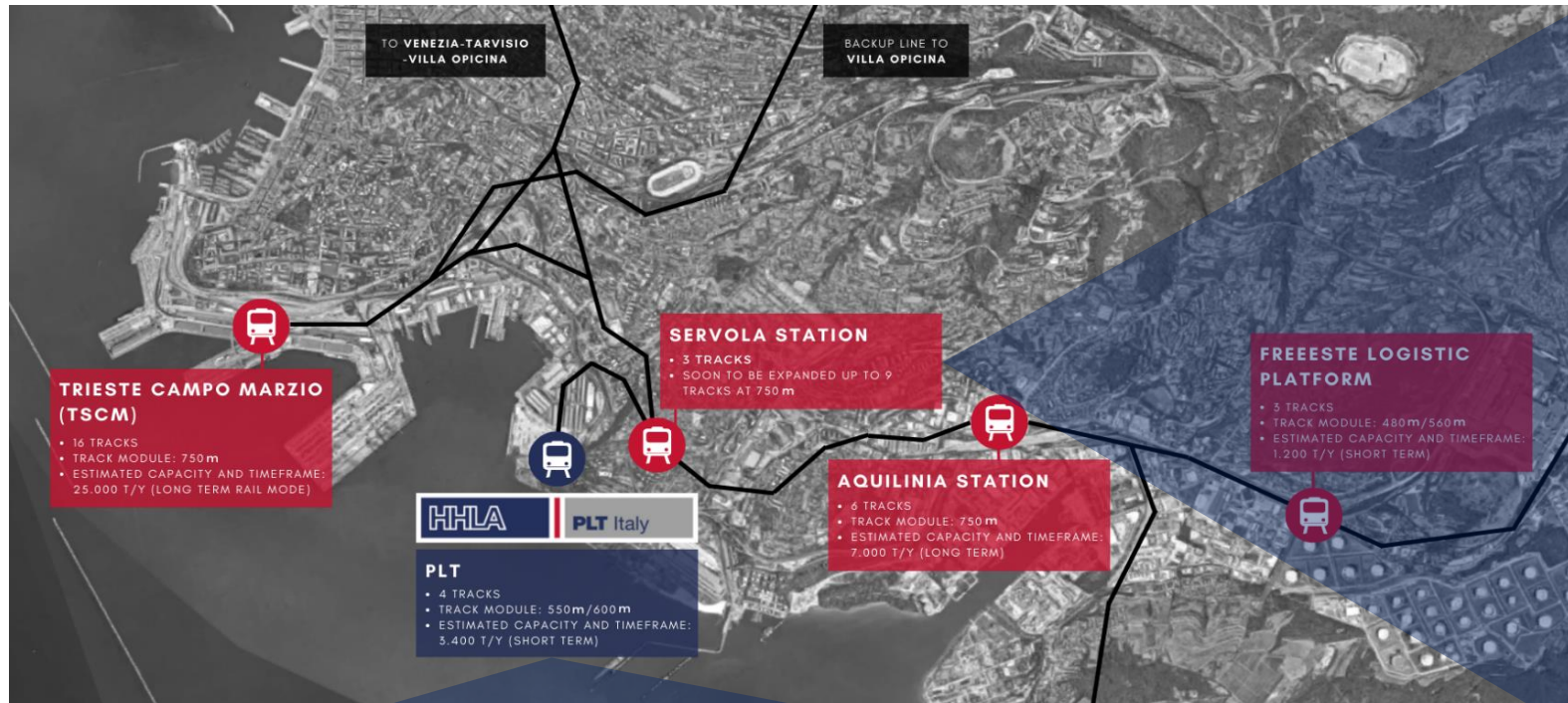
BRENNERO

- **Strategic position** between Italy and Austria for transporting goods through the Alps
- **Key link** between Italy, Austria, Germany, Central-European countries and connection with important **industrial hubs**

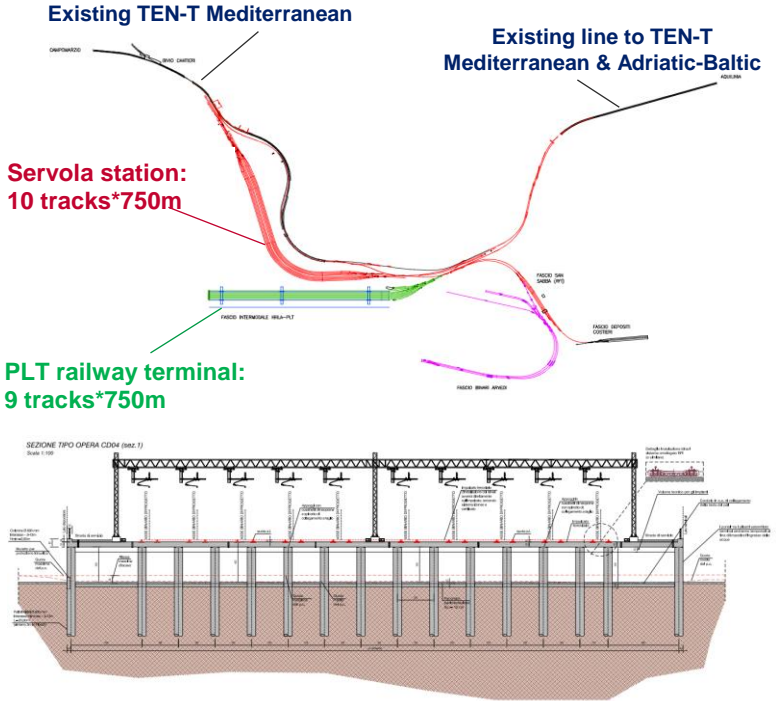


Intermodal growth potential of HHLA PLT Italy

More than 50% of the rail capacity available for customers with ongoing significant improvements



SERVOLA STATION DEVELOPMENT PLAN



Large reconstruction projects within the port of Trieste planned and financed, important for PLT:

- Opened direct access to Servola station freight line, with up to 10 tracks entirely dedicated to PLT to exit Trieste as an additional alternative to Campo Marzio station
- Reactivation of Aquilinia station with 8 x 750 m tracks (4 tracks in 2023 / further 4 in 2024);

The proposed development combines an efficient container terminal with a high-capacity rail and road connection

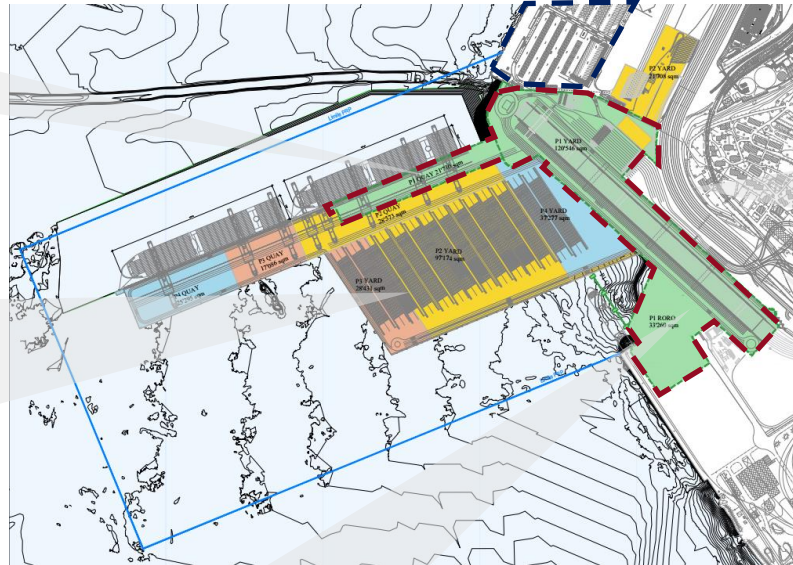
Extension of PLT quay/yard:

- Capable of serving simultaneously longest RoRo vessels and deep-sea container vessels in phase 1.

New container terminal:

- Phase 2 and beyond
- Highly automated
- Emission neutral
- Using latest technology
- Capable of serving largest container vessels
- Planned total capacity 1.6 Mio. TEU (but further expansion possible),
- Phase 1: 500k TEU.

Existing PLT Terminal



New rail terminal:

- Phase 1
- Up to 9 tracks at 750 m allowing handling of longest allowed trains
- Max. capacity > 40 / day = 280 trains / week

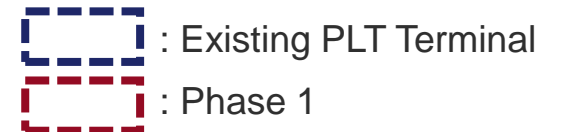
Public project areas:

New railway marshalling yard:

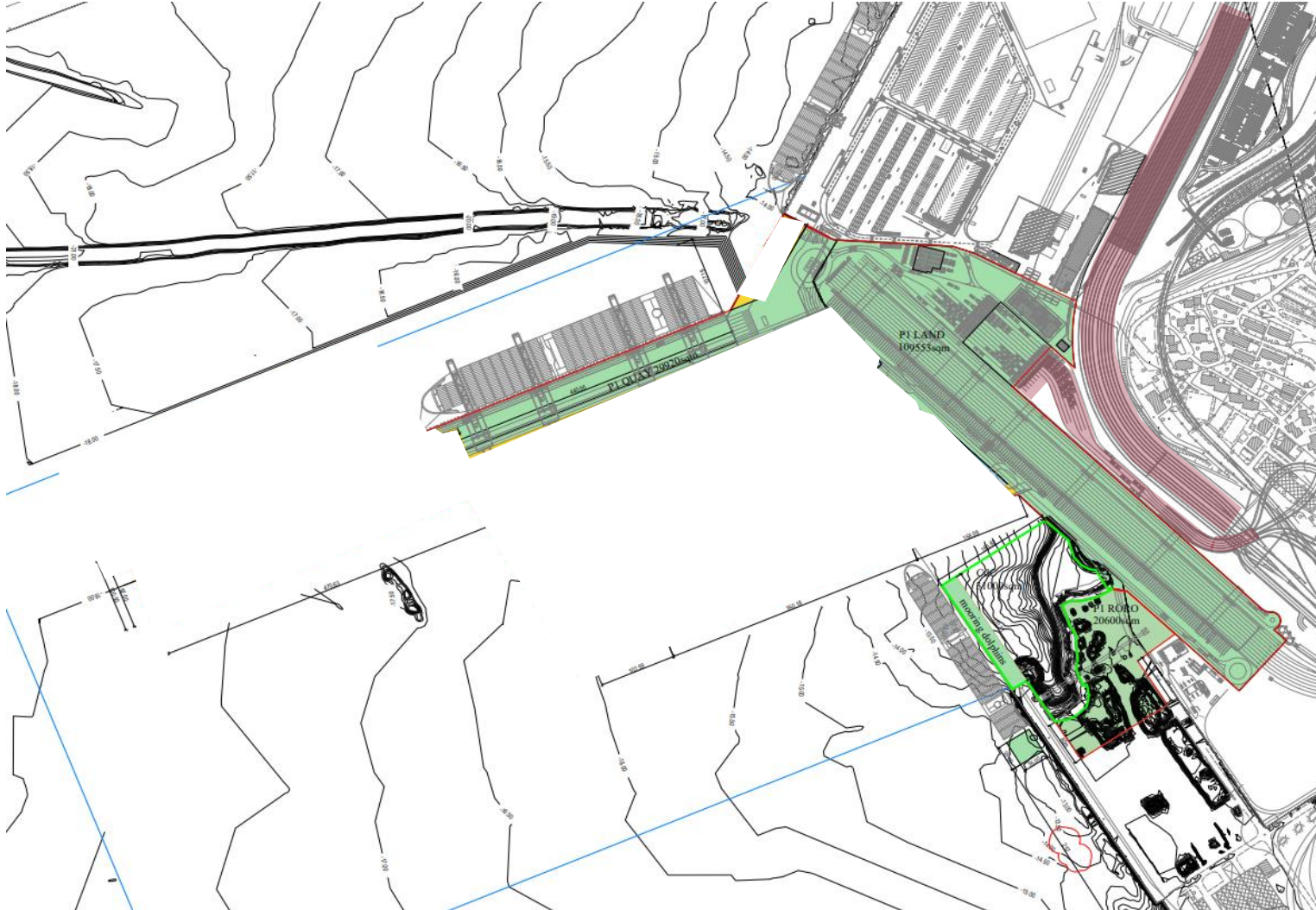
- 10 tracks dedicated to PLT terminal
- Direct connection to the national rail network with > 50% capacity available

New highway connection:

- Direct connection to highway towards Venice, Udine and Ljubljana,
- Highways around Trieste not congested.



PLT expansion: Phase 1 ready in 2029



Expansion areas (green):

- Start construction 2024
- 2 container berths including new 400m berth.
- 3 STS cranes for 24k TEU vessels + 2 MHC
- Rail terminal with >3 tracks @ 750m including 3 RMG
- 3 x RoRo Berth
- Direct terminal access from highway with automated gate

HHLA PLT Italy the Gateway to Europe: sustainability and innovation



Estimated reduction of
18M tons of Co2



65% rail split (reduced CO2 emissions, fewer trucks on the road)



Climate Neutrality.

In support of TEN-T and the Green European Deal



Highest degree of service achieved with **automation and innovation**



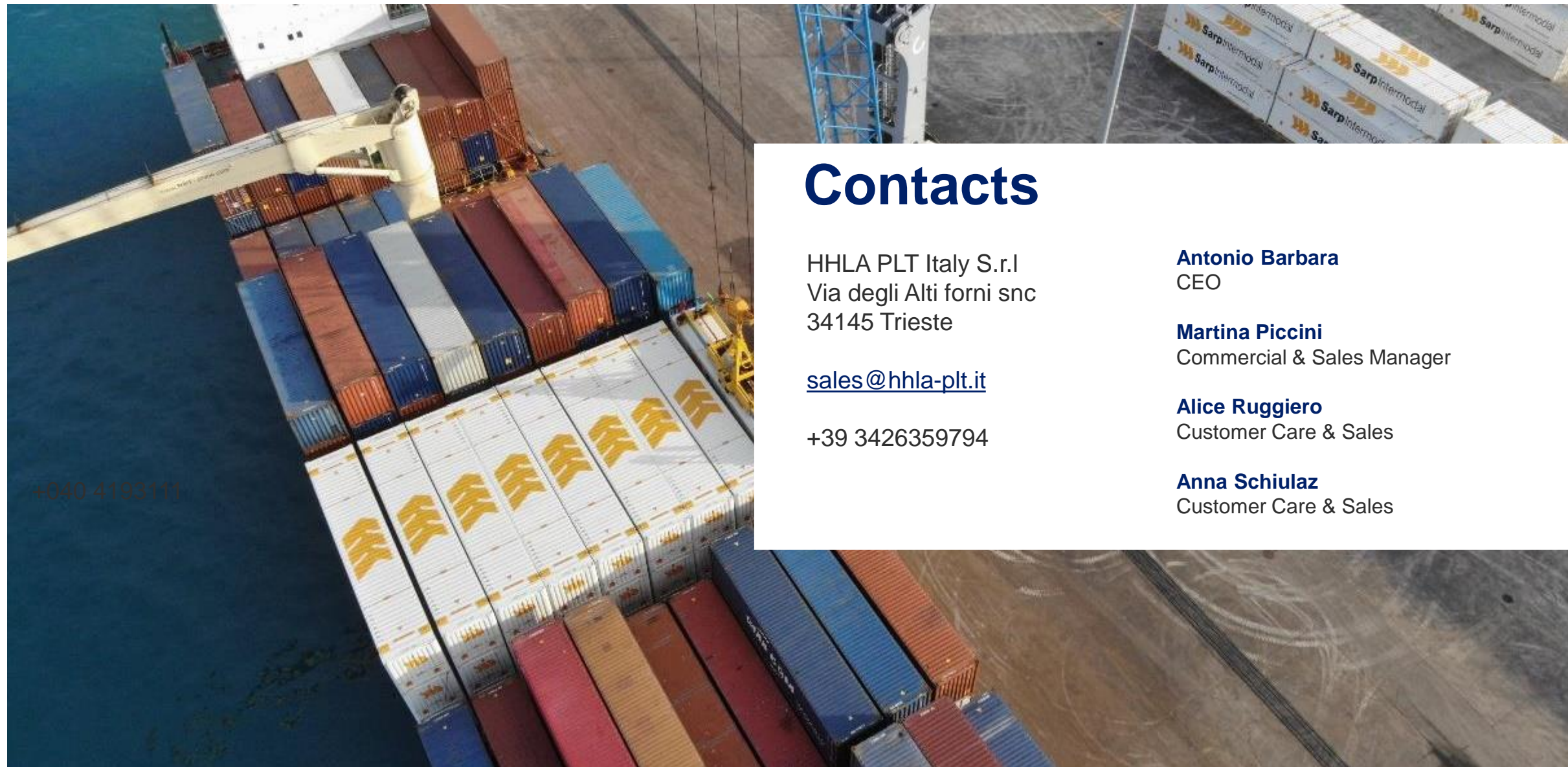
Sustainability as a guiding value to reduce CO2 emissions to zero



HHLA commits by 2040 to be climate neutral



700+ creation of **skilled jobs**



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