



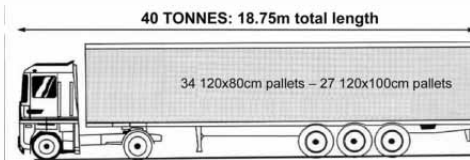
KEY ELEMENTS

PHASE 1: BIBLIOGRAPHIC REVIEW

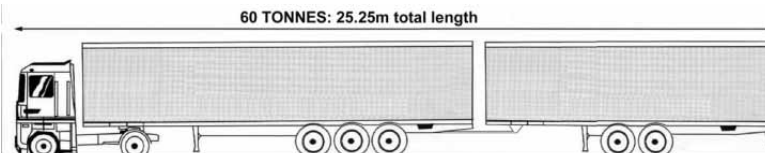
The review firstly confirmed the existence of several container models that are not ISO-certified. This lack of standardisation is the first factor slowing the emergence of a unified 45' logistics market, which would allow the gradual rollout of suitable facilities. This situation is exacerbated by a certain lack of regulatory and technical clarity as to whether the existing equipment can be used efficiently.

This review then showed that two markets using this type of container exist in parallel, with fairly low interaction: short-sea shipping across the North Sea, and inter-continental logistics chains for niche markets. Lastly it confirmed that, for logistics operators, a decisive factor is the price of 45' intermodal solutions versus road solutions. The rest of the project will explore these three areas – technical solutions, market organisation and economic relevance – in greater detail.

Interviewee: Olivier Klein, researcher at LET
(transport economics laboratory).



Dimensions of a semi-trailer



European Modular System

WHERE ARE WE UP TO?

A status update on the UTILE project.

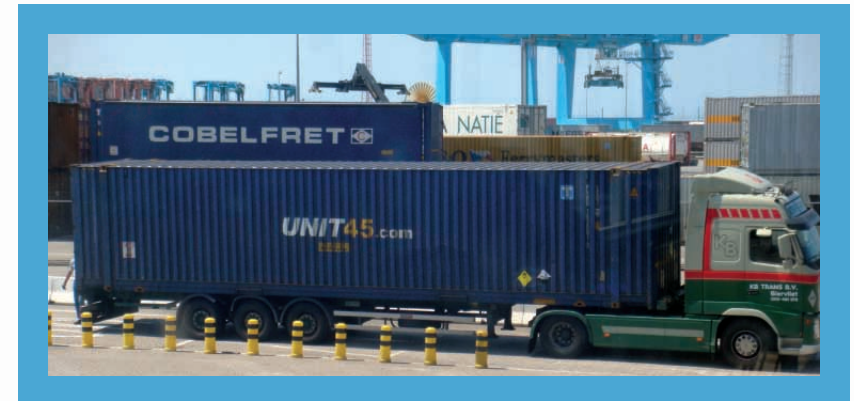
After the bibliographic review, the general rail-river case study and work on the relevant corridors, the research team is currently studying the logistics chain.

PROJECT TEAM:

Scientific director:
Olivier Klein (ENTPE-LET)

Project leader:
Cécile Cohas (VNF Lyon)

Research manager
for INRETS:
Antoine Frémont (SPLOTT)



FOCUS

EMS AND 45' PW: COMPETITORS OR COMPLEMENTARY?

Will France experiment with the European Modular System (sometimes known as the "eco-combi")? What are the pros and cons of the two containers?

The EMS experiment started in March but was terminated in July. The intention was to produce an amendment of European Directive 96/53 on road-vehicle weights and dimensions. The EMS is 25.25m long. It therefore optimises road carriage of goods by transporting the same quantity of goods in two EMS units as in three conventional road units.

How is the introduction of the EMS linked to the expected development of the 45' PW?

The 45' PW and the EMS meet different needs when they are not developed for the same geographic routes or on the same markets. They must be viewed as solutions that expand the transport-services offering: not all flows justify using EMS units, and the many shippers satisfied with a semi-trailer's payload could potentially deploy the 45' PW.

Interviewee: Christian Rose, deputy chief executive of the French Association of Freight Transport Users (AUTF)



Members of the technical and steering committees:

ADEME, AUTF, BP2S, CASINO, COE, CNR, CTS, DGITM, DRAST, ECOMODAL, GPM, IMTM, LOGIRHONE, LOUIS DREYFUS, LYON TERMINAL, MARFRET, MGE, PAGNY TERMINAL, RFF, RSC, SNCF, TLF

PROJECT PARTNERS:



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EXPERT OPINION

ERIC DESMET

Director, GS International, international consultancy and container vendor

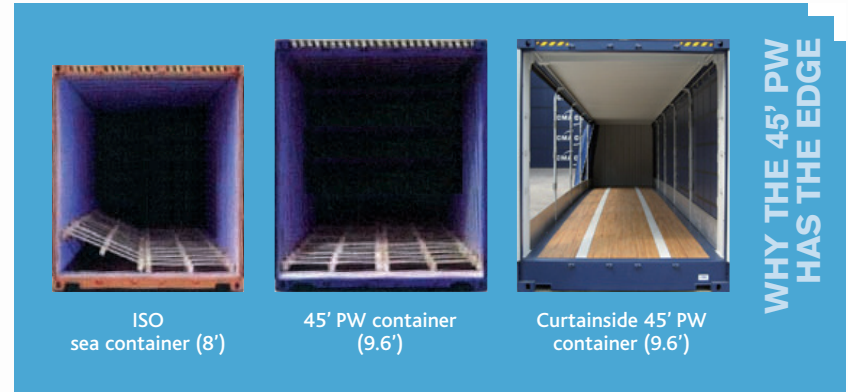
The 45' has been popular for roughly 20 years in Northern Europe for short-sea routes. Recently it has quietly started to break into the French market, thanks to strong environmental concerns and a shift in mentalities. The 45' curtainsider – which, like the dry version, is closer in size to the semi-trailer, but which, compared to the dry unit, is used more like a semi – is earning the approval of shippers and users, but its higher maintenance costs and highly-targeted use are the first factor constraining its development. Infrastructures, canals, barges, handling facilities and storage platforms are key in ensuring the smooth operation of a dedicated line of 45' standard or curtainside units.

INSIDE DIMENSIONS	DRY 45' PW	CURTAINSIDE 45' PW	SEMI-TRAILER UNIT	SEA CONTAINER (94' ISO HIGH-CUBE)
Length (m)	13.5	13.5	13.6	12
Width (m)	2.45	2.45	2.5	2.33
Height (m)	2.7	2.5	2.7	2.7
GVW (tonnes)	44	44	40	40 (44 possible*)

* In case of road transport as extension of a river or rail route.

The two designs differ by their technical characteristics:

- the dry unit, which is front-loading, is perfectly suited to the needs of shippers equipped with bays,
- the curtainsider, which is preferred by shippers and users for its two loading options (side or front) and size (similar to a trailer), better meets the requirements of big food retailers.



WHY THE 45' PW HAS THE EDGE

QUESTIONS FOR...

ANTOINE FRÉMONT

Research director, SPLOTT, INRETS

PHASE 2: IS RAIL-RIVER MULTIMODALITY A DREAM OR REALITY?

You've visited several sites in Northern Europe: what's the state of combined transport in Europe?

There isn't really any transport service that combines sea, river, rail and road, because such a chain involves too many load transfers. But inland river platforms on the Rhine are often connected to the rail network - the DeCeTe terminal in Duisburg, for example, which is run by Rotterdam-based container handler ECT. So on the Rhine, there's a complementary fit between rail and river for pre- and post-routing via sea and ports.

Of the sites you visited, which impressed you most?

Those where loads can be consolidated (in sea containers) and thus allow pre- or post-routing by rail or barge: the MSC Home Terminal in Anvers, for instance, or the Maasvlakte container terminals in Rotterdam. And conversely there mustn't be many inland platforms, so that traffic is not scattered.

Which stakeholders did you meet?

Mostly shipowners that specialise in transporting 45' PW units – in particular, Samskip and DFDS Container Line. But the 45' PW remains a more specific market than ISO sea containers.

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