

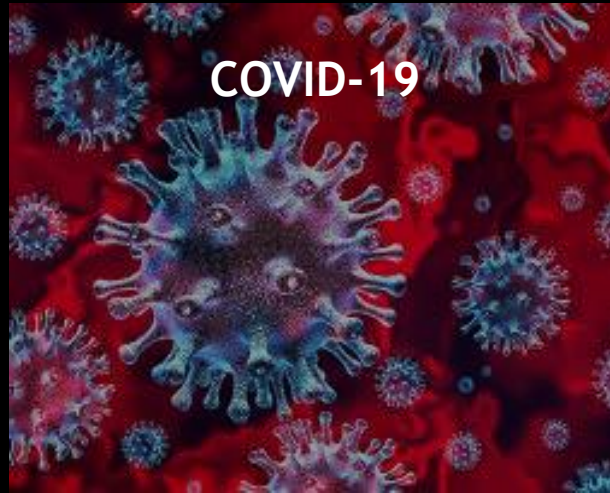


What intermodal supply chains need to be competitive - an outsider's perspective

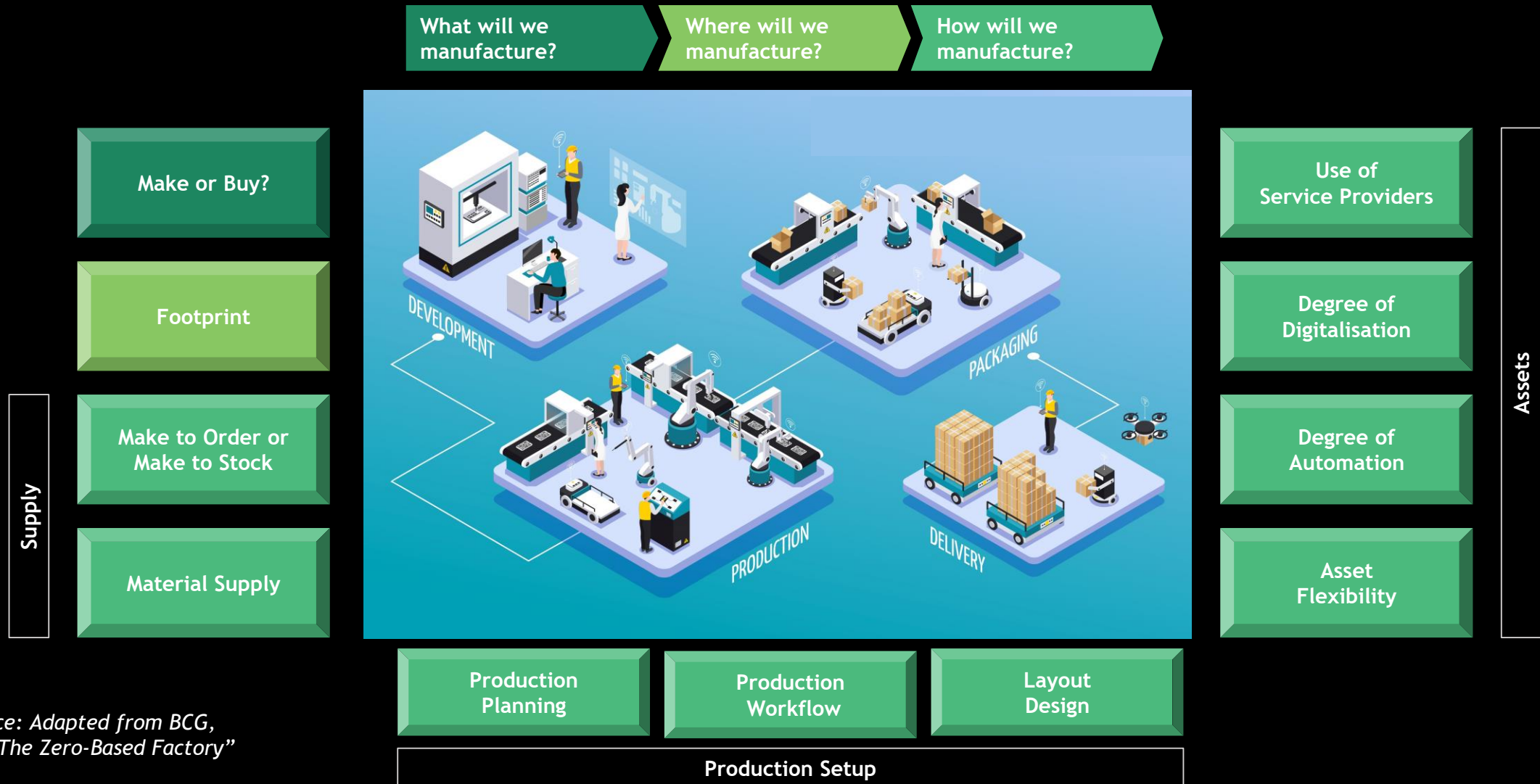
David Yang, Regional CEO, PSA Euromed-Americas

HUPAC INTERMODAL FORUM, 26 May '23

TREND 1: Increased supply chain stresses demonstrate the need for resilience

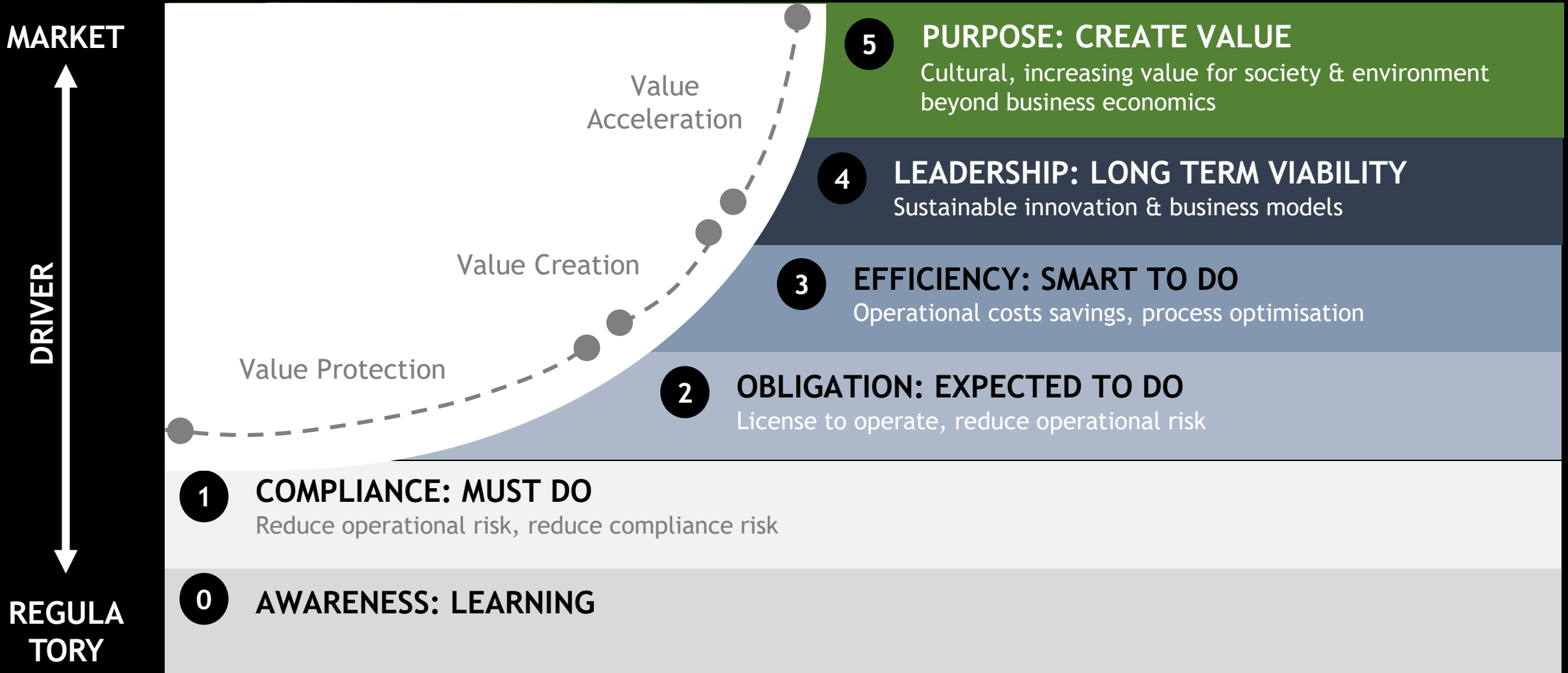


TREND 2: Global and complex production systems are seeking for agility to respond to future stresses



Source: Adapted from BCG, 2021, "The Zero-Based Factory"

TREND 3: Sustainability is becoming commercial



Source: PWC

As a result, future producers and supply chain owners
must balance complex needs
leading to the **re-industrialization of Europe**



Global EV
sales has
grown 10x
over the last
5 years

(representing an increase
from 2% to
14% of total car sales)

Source: IEA

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Establishment of EV battery gigafactory supply chains in Europe is huge opportunity for intermodal transport!



Source: Battery news

But European intermodal growth is hampered by overarching capacity and regulatory issues

EUROPEAN COURT OF AUDITORS / Report

Special report 08/2023: Intermodal freight transport: EU still far from getting freight off the road

27/03/2023

Energy, environment and climate action

Transport and mobility

Regional policy and cohesion



The EU's Green Deal in transport requires €7.7 billion of investment in intermodal

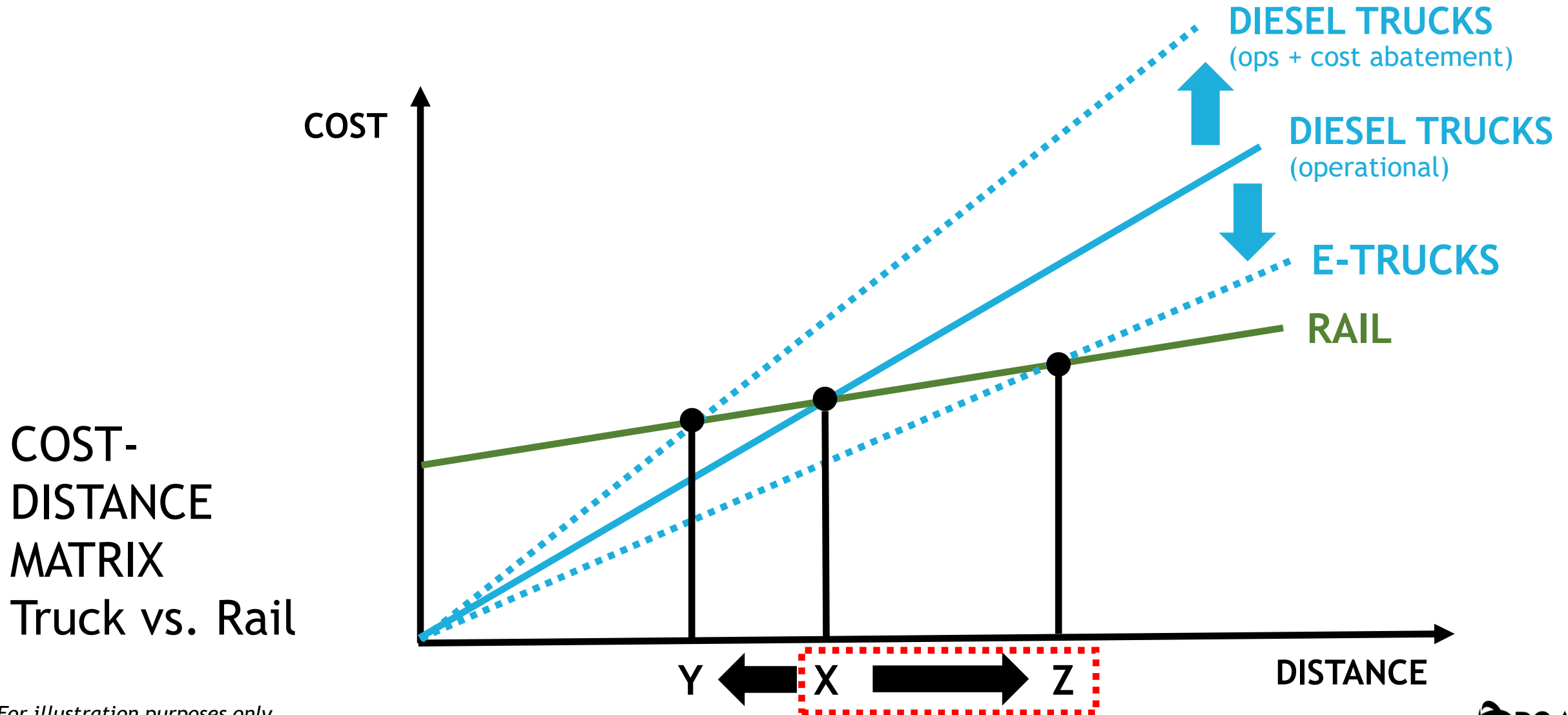
The Directorate-General for Mobility and Transport of the European Union (DG MOVE) carried out an analysis of the efficiency of the different types of intermodal transport and the capacity of the transport infrastructure to take over road freight. Vertical loading was considered the most effective method of introducing units on wagons. At the same time, serious infrastructure constraints were pointed out, which hinder the development of intermodal transport in Europe.



Image: Flickr. © European Parliament

France's Prime Minister Elisabeth Borne claimed that the French government is ready to allocate 100 billion euros for the execution of the plan presented by the Infrastructure Orientation Council (COI). The plan analyses the necessary investments for mobility in France between 2023 and 2042, with a strong emphasis on rail.

Is rail losing its unique selling point as most sustainable mode of intermodal transport?

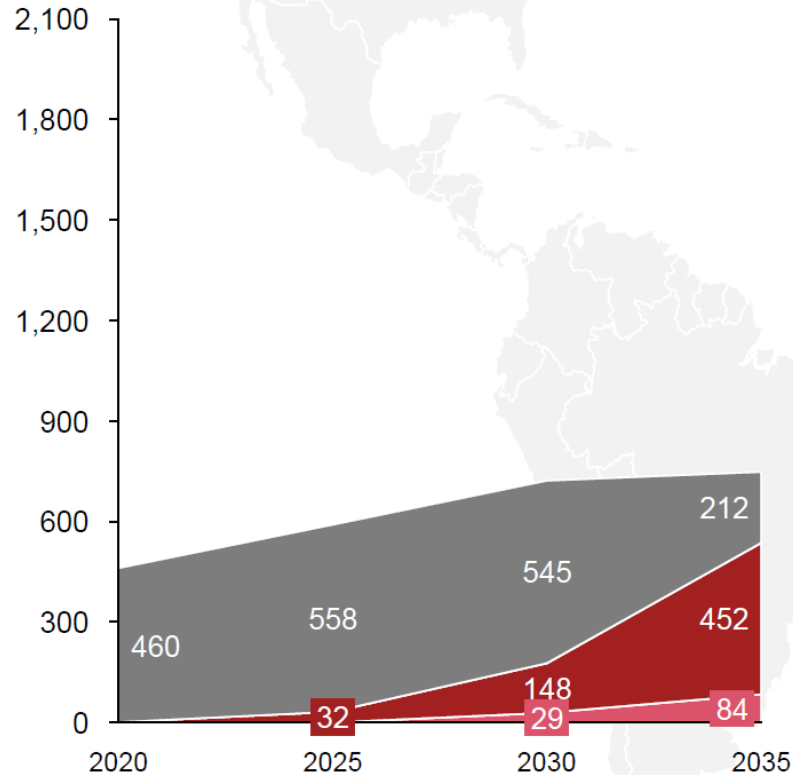


For illustration purposes only

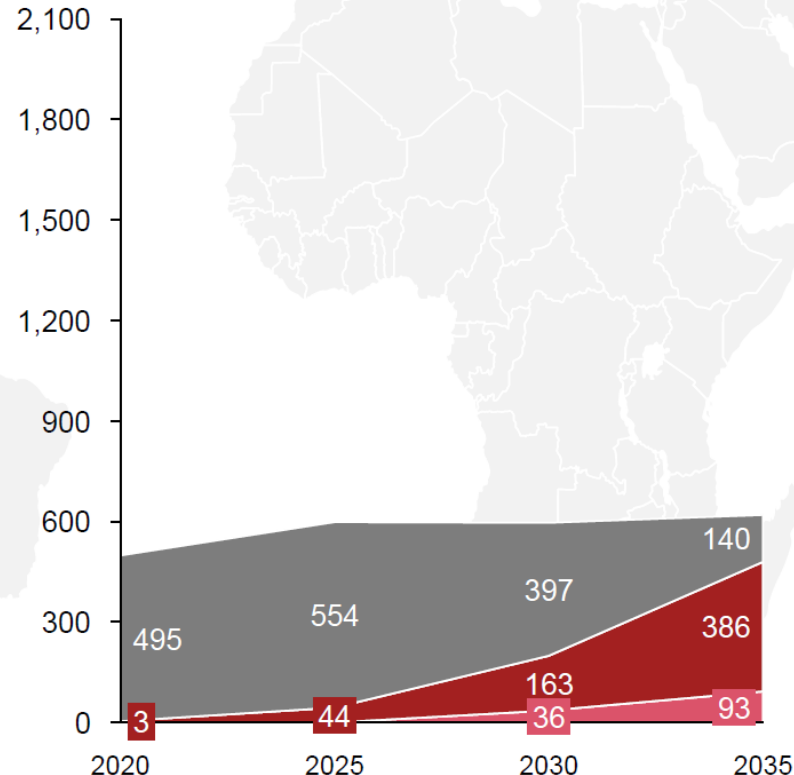
>75% of trucks produced worldwide will be electrified (battery or fuel cells) by 2035

Truck electrification ramp-up 2020-2035 in selected regions¹

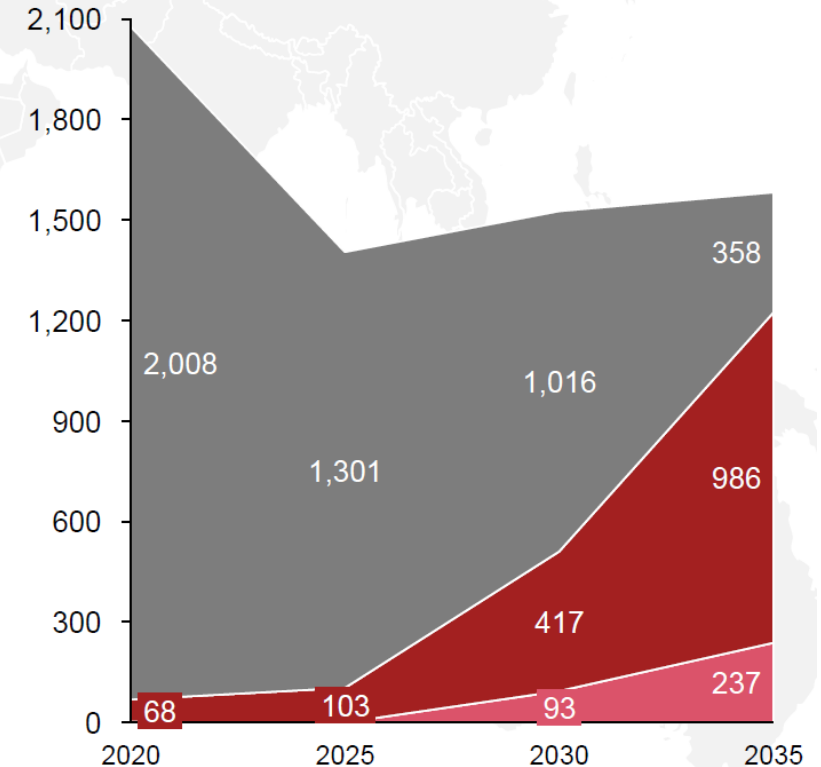
North America (k vehicles)



Europe (k vehicles)



Greater China (k vehicles)



Source: PWC

ICE / other BET FCT

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ZERO EMISSION SERVICES

Shareholders of Zero Emission Services:



Will we fall behind the
pace of change and
become a
LIABILITY?

Or will we enable
sustainable trade as a
**GAME
CHANGER?**

PSA Today

Leading global port operator and total supply chain provider

91 MILLION TEUS

1 in 10 containers passed through a PSA terminal in 2022



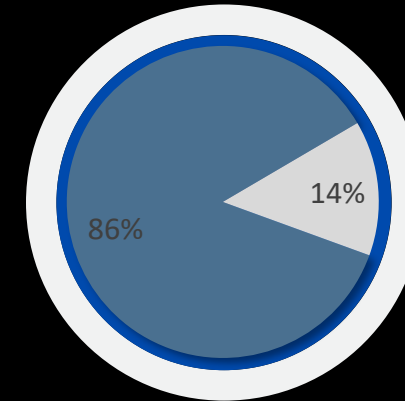
49,000 STAFF GLOBALLY

A diverse global team with deep expertise in supply chain management, logistics, digital, marine services



2 Classes of Business

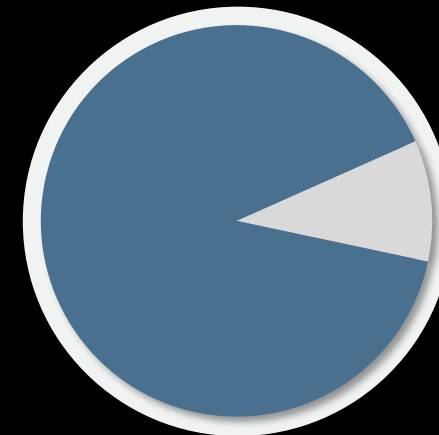
Ports



Cargo Solutions

% Share of Net Revenue

Ports



Cargo Solutions

% Staff Strength

PSA GLOBAL NETWORK

Powering supply chain orchestration with a global network of port hubs, cargo solutions nodes and digital services

BELGIUM
• PSA Belgium

PHILADELPHIA
• PSA BDP HQ

SINGAPORE
• PSA Global HQ
• PSA Singapore

PSA
42 Countries
160 Locations
66 Terminals

ASIA

Bangladesh
China
India
Indonesia
Japan
Malaysia
Oman
Qatar
Saudi Arabia
Singapore
South Korea
Thailand
Turkey
UAE
Vietnam

EUROPE

Belgium
Czech Republic
Denmark
France
Germany
Ireland
Italy
Netherlands
Poland
Portugal
Sweden
Switzerland
Spain
United Kingdom

THE AMERICAS

Argentina
Brazil
Canada
Chile
Colombia
Panama
Peru
Uruguay
USA

AFRICA

Egypt
Morocco

OCEANIA

Australia
New Zealand

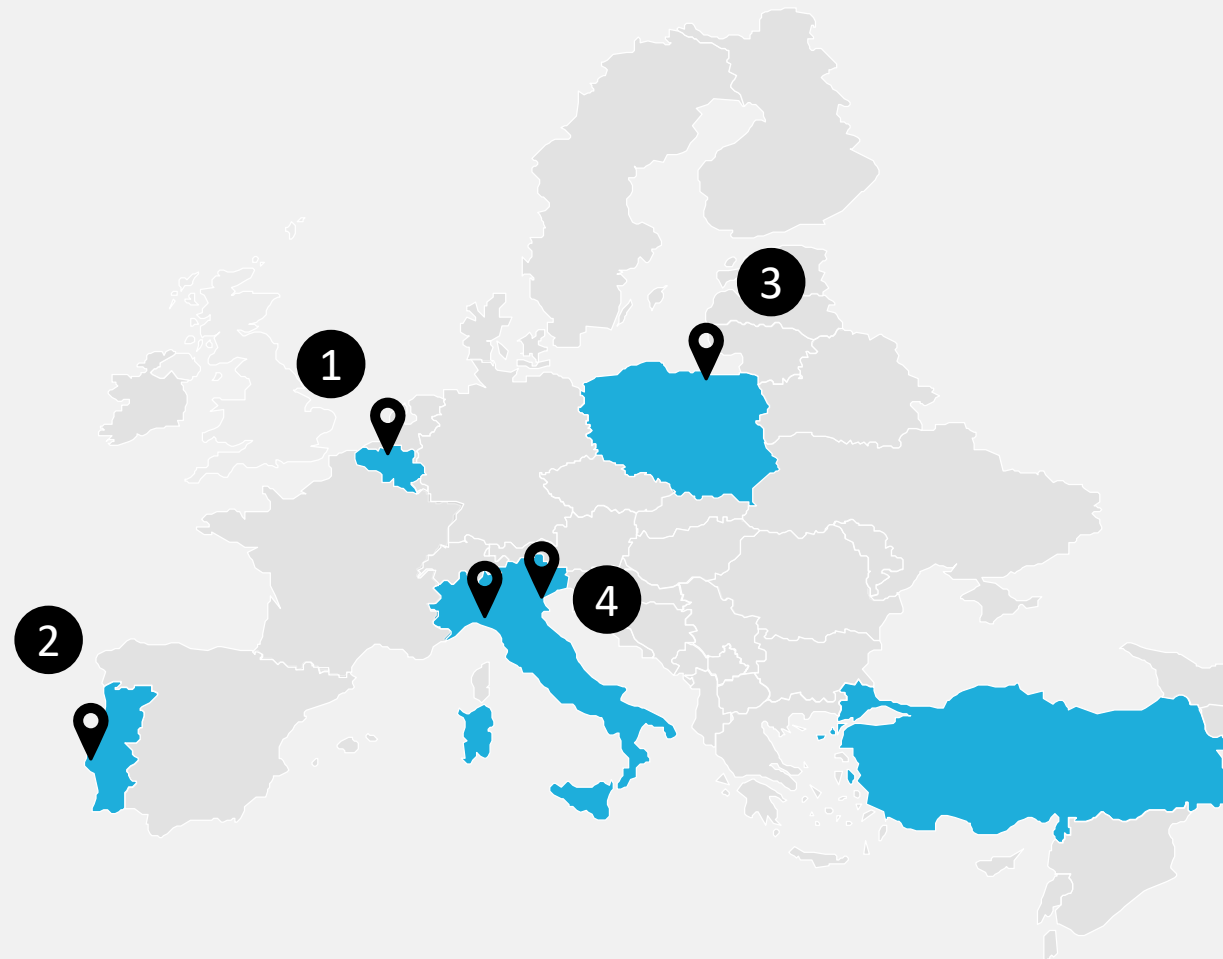
CRIMSONLOGIC

Present in 20 Countries
Implemented >60 Projects
Digital solutions in >40 Countries

Not included in PSA Global Network count



PSA invests massively in port infrastructure...



1

PSA BELGIUM

EUR 800m investment to future-proof Europa Terminal



2

PSA SINES

EUR 400m investment to double handling capacity to 4.1m TEU



3

BALTIC HUB

EUR 450m investment to increase capacity with 1.5m TEU

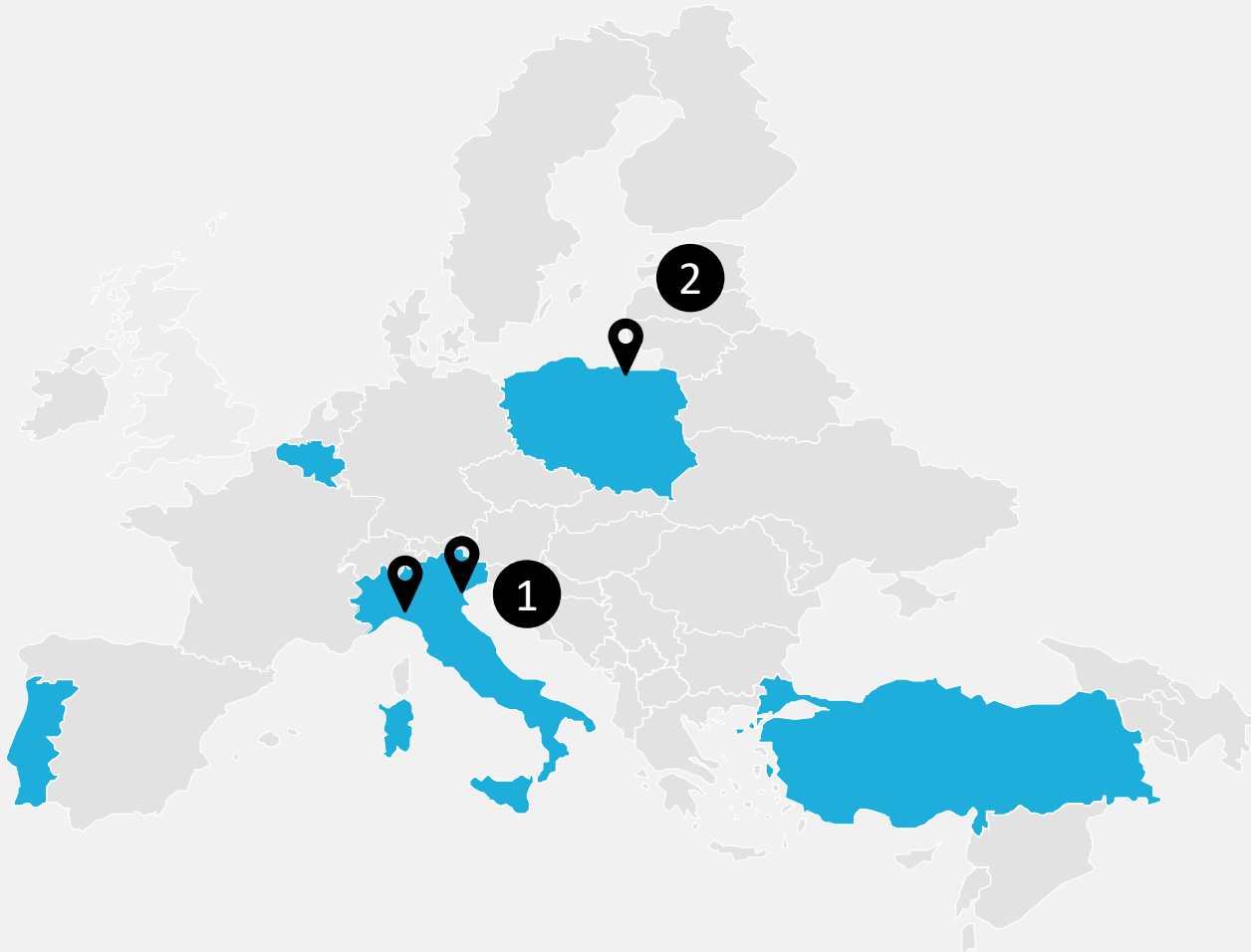


4

PSA VENICE

EUR 80m investments to future-proof the terminal

... and rail infrastructure within Europe.

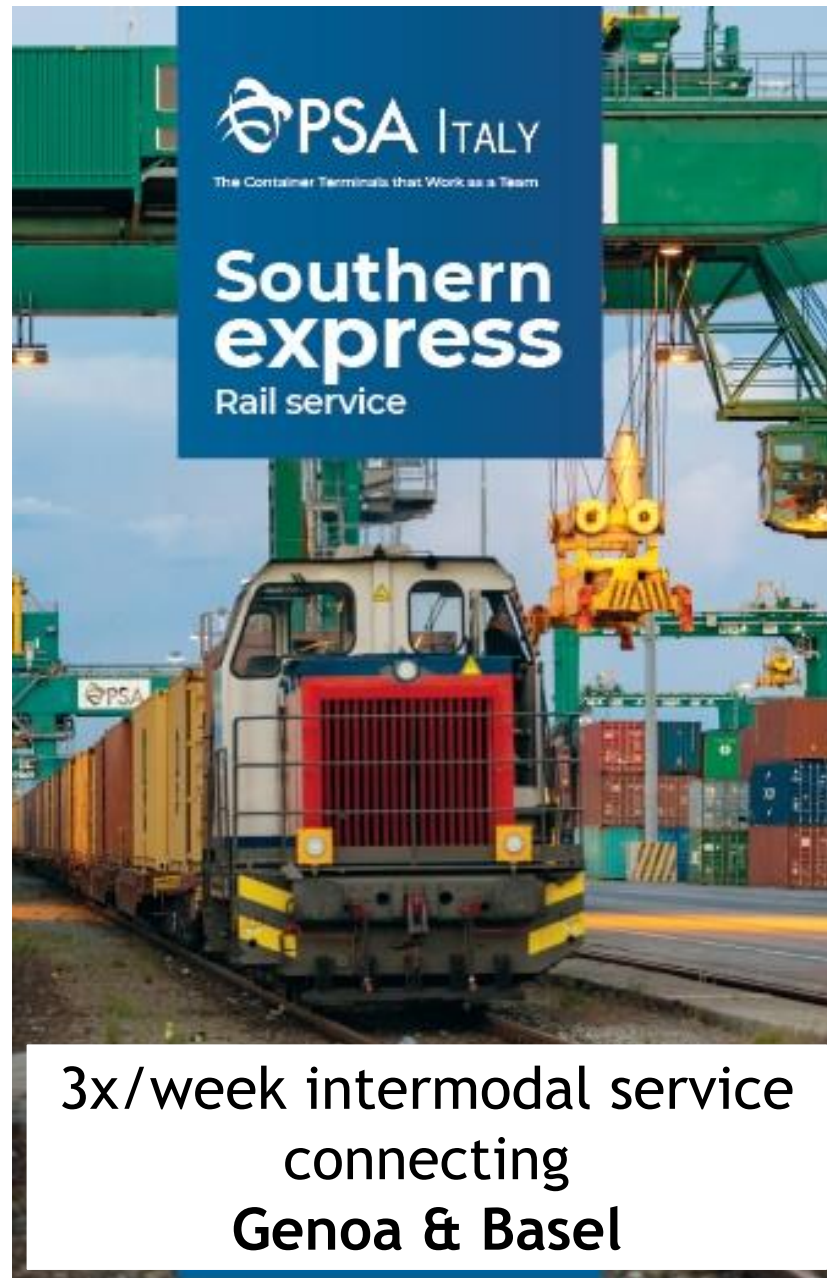


- 1 **PSA ITALY**
EUR 12.5m investment in rail infrastructure and handling equipment at PSA GP & PSA Sech
Adding 520K TEU capacity



- 2 **BALTIC HUB**
EUR 17m investment in extension and addition of railway tracks and rail handling equipment
Adding 300k TEU capacity

Direct
PSA
PORT+
Southern
Gateway
rail products
reduce carbon
emissions with
up to 40%



PSA ITALY
The Container Terminals that Work as a Team

**Southern
express**
Rail service

3x/week intermodal service
connecting
Genoa & Basel

The background image shows a blue and red locomotive pulling a train of yellow and orange containers through a port area with green cranes.



PSA ITALY
The Container Terminals that Work as a Team

**Stuttgart
express**
Rail service

PRODUCT LAUNCH IN
MAY 2023

THE NEW
STUTTGART CONNECTION
TO GENOA SOUTHERN GATEWAY

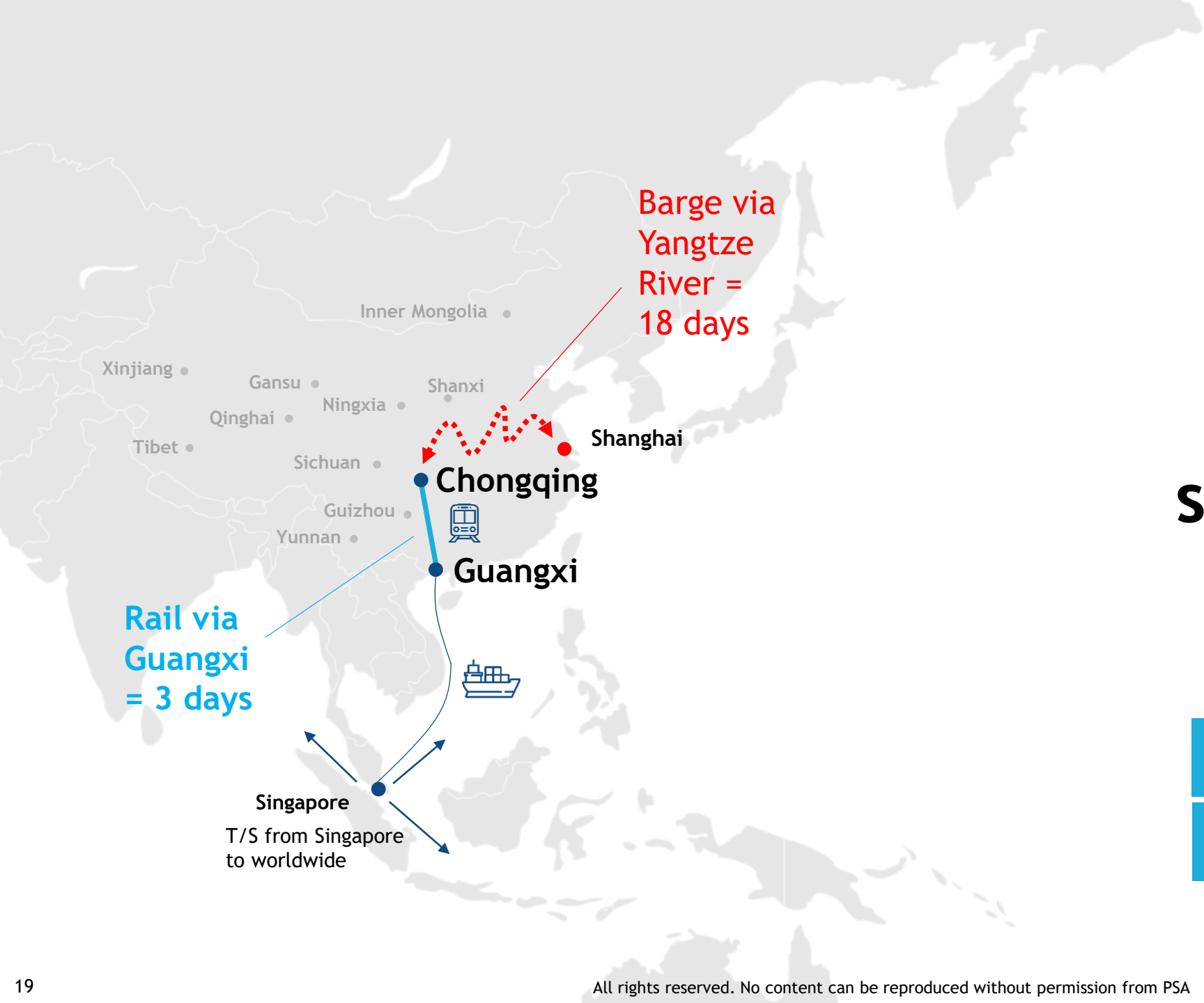
2 DIRECT TRAINS
PER WEEK
ROUND TRIP

TRANSIT-TIME
24 HRS

2x/week intermodal service
connecting
Genoa & Stuttgart

The background image shows a yellow crane lifting a blue container at a port, with a train of red containers visible in the foreground.

International PSA **PORT+** Land-Sea Trade Corridor saves Chongqing shippers 12-15 days of transit time



PSA designs and builds new inland supply chain set-ups to address specific supply chain needs of cargo owners



PSA BDP logistics for ACC gigafactory

News 27 Apr 2023 by WCN Editorial

PSA BDP, a leading provider of globally integrated and port-centric supply chain, transport, and logistics solutions, has been appointed as the logistics service provider for Automotive Cells Company (ACC).



WorldCargo
news

ACC, a joint venture between Saft, Stellantis NV and Mercedes-Benz, has the ambition to become a leader in the production of electric vehicle (EV) batteries. PSA BDP will handle the contract logistics and hinterland transport for ACC's first gigafactory in Europe, located in Billy-Berclau, France.

“PSA BDP has over half a century of experience in developing bespoke and sustainable supply chain solutions for customers in high-care industries, and its entry into the EV battery vertical is a natural extension of its capabilities and expertise,” said PSA BDP.



PSA BDP's warehouse in the Port of Dunkirk

Only through partnerships, we will be able
to capture re-industrialisation & energy
transition opportunities and develop
sustainability as business model



Let's be
**GAME
CHANGERS!**



What intermodal supply chains need to be competitive - an outsider's perspective

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THANK YOU