II Workshop on Transport Economics – Fedea/IEB

The Development of Competition in Spanish Railway Markets

Madrid, March 12th, 2012

II Workshop on Transport Economics – Fedea/IEB

Crisis !!!

Global Environment ……………. on Crisis

Changes on Global flows

- **Fail of Imports**
- **Transport Imbalance**
- **Growth of Exports**
- **Worsening of Transport Imbalance**
- **Lack of alternatives**
- **Impact on prices/costs**

Flows Reorganisation

- **2008, Last Quarter**
  - First symptoms in transport
- **2009: Suffering**
  - Be Patient !!: Soon it will be over
- **2010: Reorganisation**
  - It takes time !!: Decision of change
  - Critical Flows First
- **2011: Stabilisation**
  - Reorganisation Roll-Out
  - New Flows Introduction
- **2012: Second Phase of Adjustments**
  - Adjust the rest of flows to the new dimensions of markets.
  - Global Focus: Cost Reductions.

Crisis !!!

Adapting Logistics to the Crisis

Recent Past

- **One Supplier per Flow**
- **Each single market has its own logistics consideration**
- **Service Measurement: Cost, Time, Quality**
- **Transhipments are rejected**
- **Intensive use of rail transport**

Strategic Changes

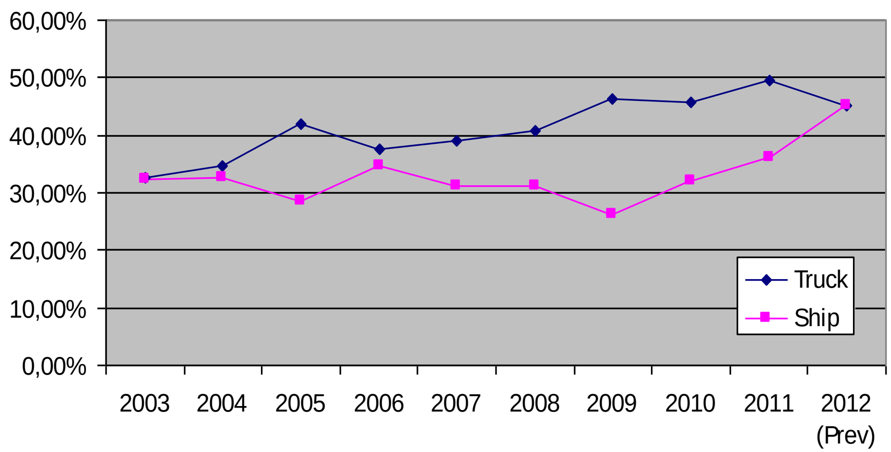
- **Creation of Groups of Countries, based on Geographic Areas**
- **More than one suppler per flow**
  - One supplier can serve to all countries of each group.
- **To achieve Costs Reductions, Lead-Time enlargements are accepted. Quality requirements are strongly maintained.**
- **Because Lead-Time enlargements, reliability is strongly required.**
- **Transhipment is accepted if improves cost**
- **Increase of transport quota on truck and ship. Important reduction on rail.**

II Workshop on Transport Economics – Fedea/IEB

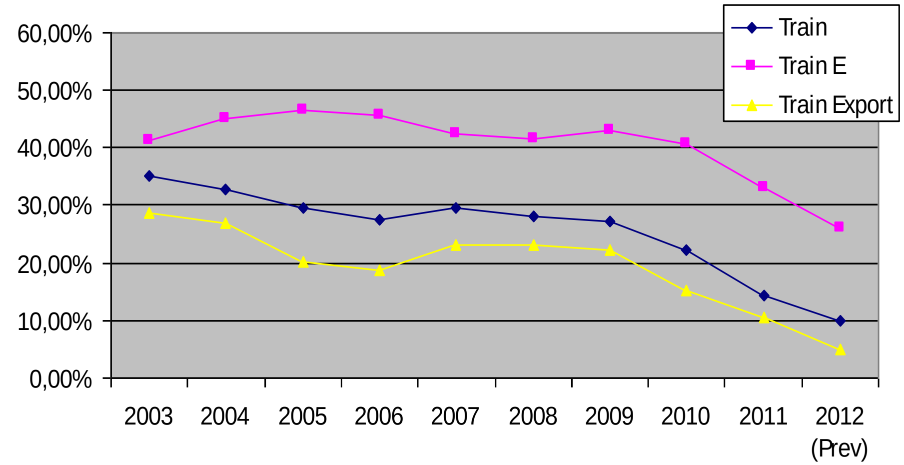
Rail Shuttle to Bcn Port Not Included

Way of Transport - Current Situation

Evolucio us Vaixell + Camió



Evolucio us del Ferrocarril (enviament a destinacio)



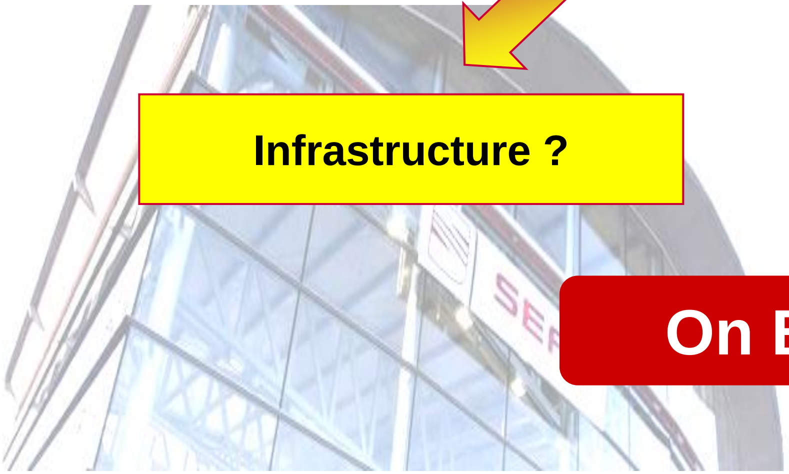
Year/Month	Base	Truck	Ship	Train	Train E	Train Export
2003	453.279	32,60%	32,40%	35,00%	41,40%	28,70%
2004	450.982	34,70%	32,50%	32,80%	45,00%	26,90%
2005	396.779	41,80%	28,50%	29,70%	46,60%	20,20%
2006	416.096	37,60%	34,80%	27,60%	45,60%	18,60%
2007	419.812	39,10%	31,20%	29,60%	42,40%	23,20%
2008	383.261	40,70%	31,20%	28,10%	41,50%	23,10%
2009	313.814	46,30%	26,30%	27,10%	43,10%	22,10%
2010	345.591	45,70%	32,00%	22,30%	40,80%	15,30%
2011	368.261	49,60%	36,00%	14,40%	33,00%	10,40%
2012 (Prev)	480.000	45,00%	45,00%	10,00%	26,00%	5,00%

II Workshop on Transport Economics – Fedea/IEB

When we are talking about train…….

..... about that we are exactly talking ???

Costs + Service



Infrastructure ?

Management ?

On Both !!!

II Workshop on Transport Economics – Fedea/IEB