Freight traffic

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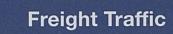
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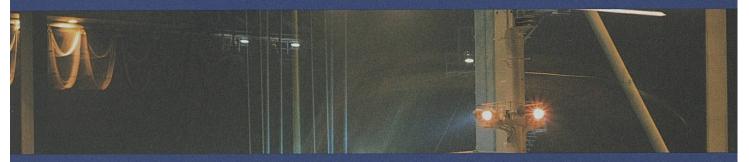
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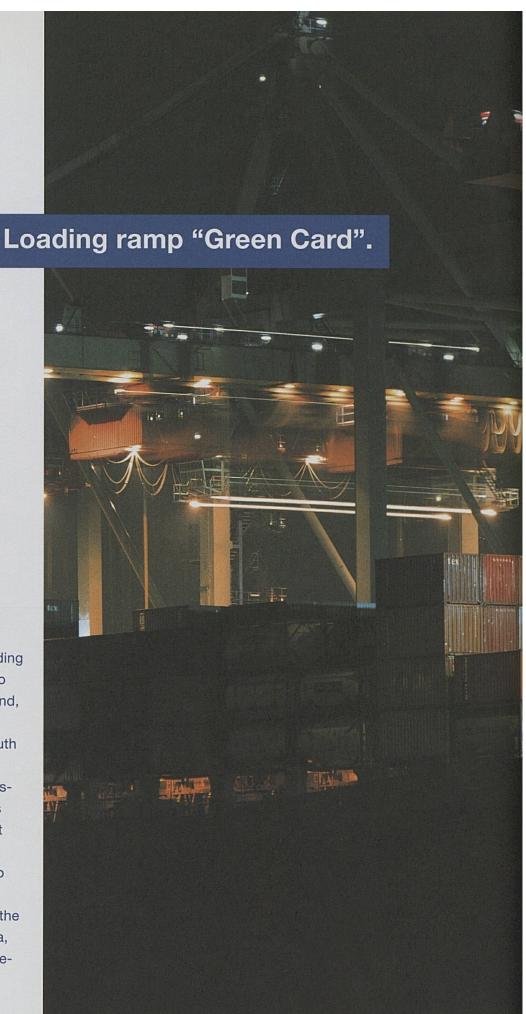
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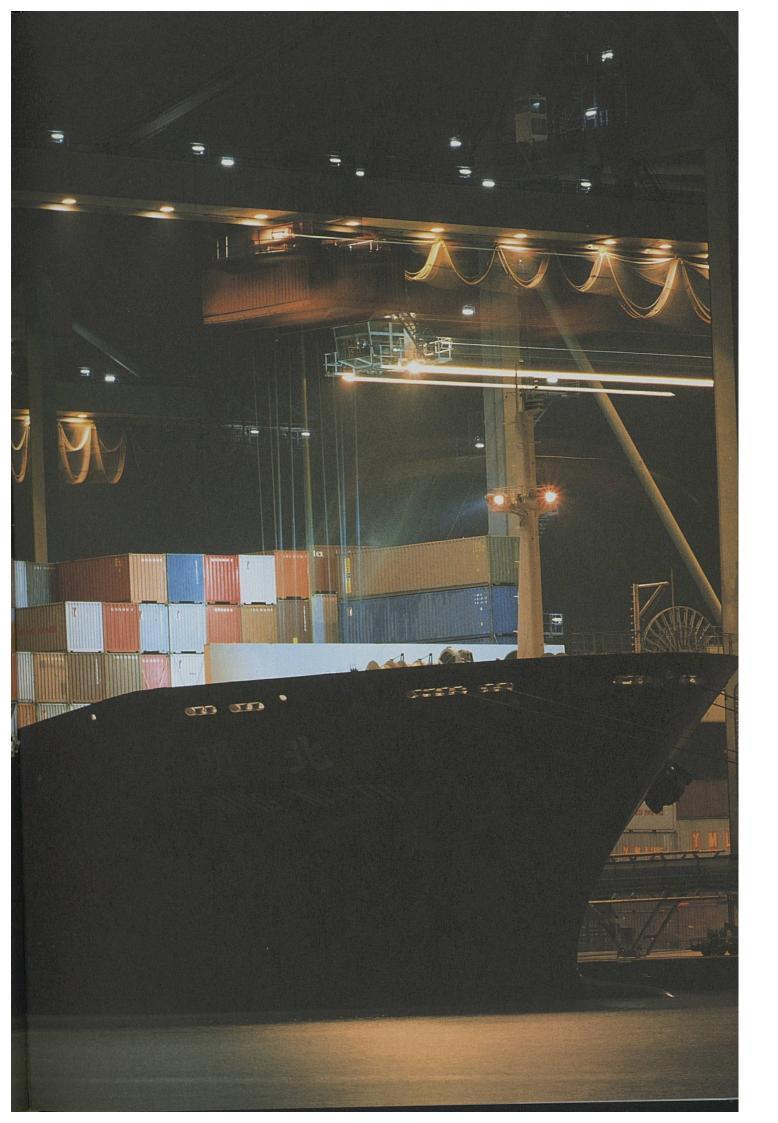
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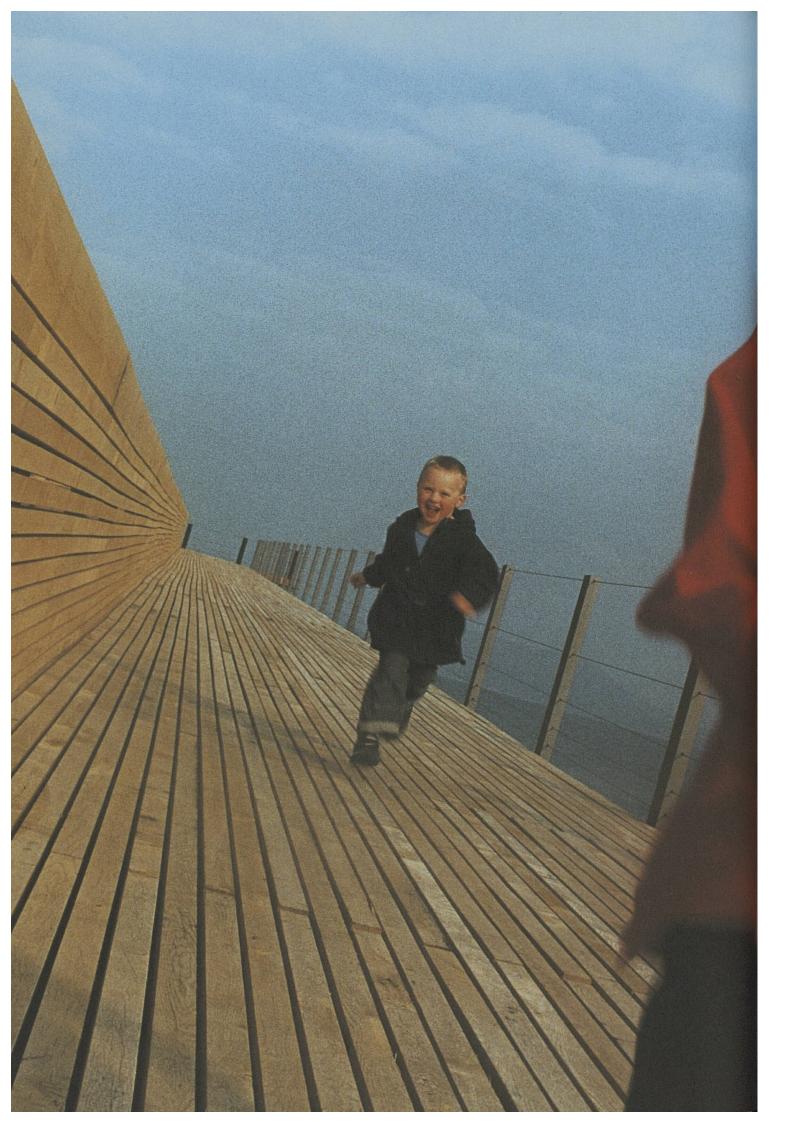


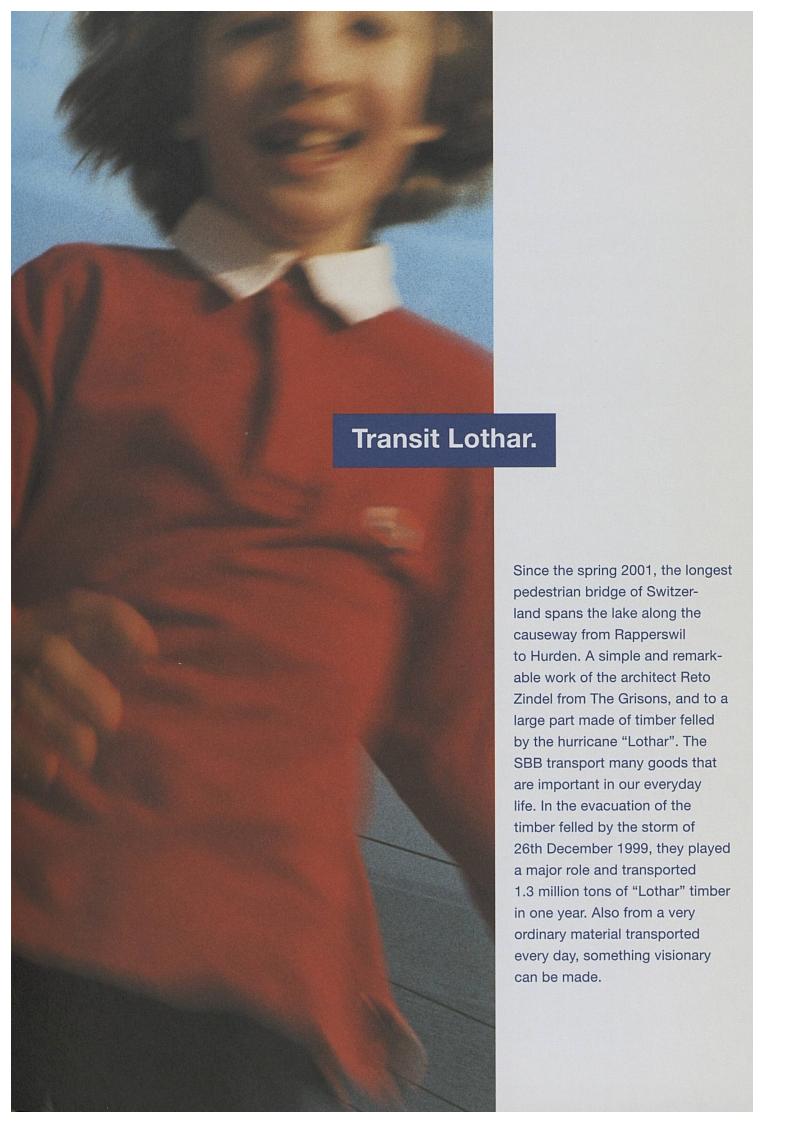




Goods flows do not heed frontiers. SBB freight traffic is heading for markets abroad. SBB Cargo offers transports out of one hand, punctually, competently and reliably. Partnerships in the south and the north further increase the quality of international transport. Through them, the clients are getting a single, competent partner. Whether chemical products from Ludwigshafen to Lombardy, or the complete furnishings of an apartment in the container from Aarau to Atlanta, the railway does it. Also if sometimes deep-sea transport is involved.







Cargo: new record volumes



Opened markets – yet there are still border checks

Last year, SBB Cargo could achieve new records both in transported tonnage and in train performance. The exceptional performances in the transport of timber following the hurricane "Lothar" have contributed to these records. The opening of a Client Service Center in Fribourg, serving the whole country, was an important milestone on the way to the new organisation of SBB Cargo.

Much freight and much movement: these two elements characterise the freight business of the SBB in the past year. With an increase of 10.1 percent in traffic performances, the tonne-kilometres for the first time surpass the 10 billion figure. For the past five years, the increase is no less than 32 percent. What has also increased is the dynamism of the business, characterised by its international scope. A mark thereof are the alliances that come into being in quick succession between railway companies themselves, between railways and clients or trade organisations, as well as between railways and other partners in the transport and logistics business. After the opening of the European freight market, international competition is getting more intensive also on the rail mode.

In the course of internationalisation, SBB Cargo has made itself legally independent by becoming a limited company per 1st January 2001. This necessary move in view of a later merger of the freight businesses of the SBB and of the Italian State Railways (FS), increases entrepreneurial flexibility. SBB Cargo AG with its workforce of around 5000, is a 100 percent subsidiary of SBB AG.

maintained also in the less populated areas

Record traffic calls for top performances

With 60.5 million transported tons (+ 5.6 percent) and 10.8 billion tonne-kilometres (+10.1 percent), the SBB write new record figures. Revenue increased by 6.8 percent to reach 1081 million CHF. The different development of volumes and performances is explained by a stagnation in performances and a slight decrease in tonnage in domestic traffic, while border-crossing traffic (transit, export and import) over longer distances increased noticeably. The freight business of the SBB is eminently international: 79 percent is border-crossing traffic, and only 21 percent is purely domestic. Transit traffic with a share of 57 percent of performances is the biggest traffic sector.

In order to serve the clients well in the face of increasing volumes, and despite scant resources, the production apparatus achieved extraordinary performances. Nevertheless, punctuality in domestic freight traffic could yet be further increased. 95 percent of the trains arrived on time or with a delay of less than



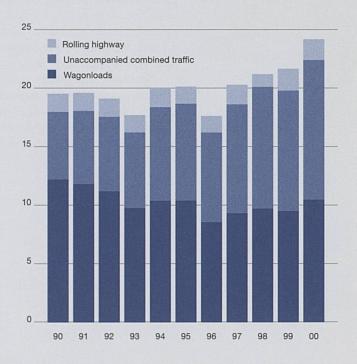
Freight trains do not sleep: t records around the clock

30 minutes (previous year 94 percent). At departure, even 96 (previous year 94) percent of the domestic freight trains were within the 30 minutes limit.

International freight traffic however suffered from production bottlenecks abroad, and partly also in Switzerland. In summer and autumn, some massive delays occurred, mainly in north-south transit. Because of lack of transport means

or line capacities, freight trains were blocked at the border. These bottlenecks brought the shortcomings of a purely national production planning and steering very much to evidence. Production improvement in transalpine traffic has the highest priority. The SBB want to meet the client requirements in regard to transport quality.

Transalpine railfreight (in million tonnes)





Central contact office for clients

Since last year, clients from all over Switzerland have been able to make use of a new Client Service Center (KSC) in Fribourg. Via a single telephone number, they can contact the KSC day and night for all information concerning their transports.

The KSC started operation in April and in several stages since then has taken over the former functions of many stations. By end of 2000, 54 percent of all transports were managed by 173 employees in Fribourg. The transfer of the freight business of all the over 800 stations to the central KSC will be terminated in May 2001. The decentralised structures are reduced correspondingly. In the first year of operation, the new Client Service Center handled 54,656 telephone calls and 128,226 faxes.



Cargo Client Service Center in Fribourg



Progressing step by step: signing of the contract with the FS in Rome

Strategy: The marketplace is Europe

European liberalisation of freight traffic intensifies competition. In order to stand their ground in fierce competition, and to contribute to a shift of traffic to the rail mode in Switzerland, the SBB want to grow. Direct connections to the key markets outside the national border become vitally important. Merely operating transit axes through the Alps does not suffice any more. Cooperations and alliances secure the necessary access to foreign markets. Apart from the strategic orientation to the south and the alliance with the Italian FS, the SBB keep an eye on the other important foreign markets, and are aiming at cooperations where it makes sense.

SBB Cargo brings a big know-how, a distinct quality-mindedness and a good company size into the international business. The strategy in international as well as domestic markets aims at offering comprehensive trade-specific solutions out of one hand. Client requirements always get more complex. Increasingly, the clients ask for total solutions for the whole transport chain, if possible with a single contact partner. With a strategy of growth not confined to within the national borders, customized logistics solutions for individual client segments, and productivity increases, the SBB steel themselves against stiffer competition. In the year 2008, railway freight traffic in Europe will be fully liberalised. Also for this reason, competition is likely to become much more intensive.



40-ton HGVs take the train: Rollin Road – more necessary than ever

Italy: step-by-step towards the goal

The joint venture of the freight businesses of the FS and the SBB is still of prime importance to both partners. In Rome on 2nd February 2000, the Board Chairmen and the CEOs of both railways signed the merger agreement. After an assessment of the state of progress, carried out in autumn together with external coaches, the path to follow was newly staked out, and preference was given to a stepby-step approach. The "full merger" will materialise after this process will have shown results. In a first priority, and to comply with client requirements, FS and SBB will jointly improve cross-border production.

For urgently needed quality improvement, both partners have agreed to plan and steer the runs of transalpine freight trains as one product on both sides of the border. In the future, the SBB are responsible for the whole runs of block trains to northern Italy (north of Milan), while for long-distance trains to Milan and beyond, responsibility lies with the FS. Undivided responsibility reduces the interfaces and the waiting times caused by the "system fracture" at the border stations to Italy. Basel as a central door to the north is given a key role in this production concept.

Regarding marketing, joint products are, for the time being, developed and offered for the chemical and recycling trades. The production and marketing concepts are worked out by mixed FS and SBB teams, directed by the respective business field managers of the two railways.

LSVA: mastering a double challenge

SBB Cargo is also duty-bound internationally through the flanking measures of Switzerland to the Land Transport Agreement with the European Union. By 1st January 2001, the performancerelated heavy lorry tax (LSVA) has been introduced, without causing significant problems or congestions on the roads. At the same time, the weight limit for lorries was raised in a first step from 28 to 34 tons. The phased opening of Switzerland to heavier lorries is a double challenge for the railway. On the one side, competition between transport modes will be further increased by a tendential reduction of road transport prices. On the other side, SBB, BLS and Hupac operate an efficient and attractive "rolling road", by government mandate, and as an alternative to road transit.

Until 2005 when the LSVA will be fully effective and the 40-ton lorries will have full access to the roads, the effects on transport volumes and on profit margins are difficult to estimate. It is uncontested that for heavy goods, the road becomes more competitive. With maximal use of capacity on the outward and the return trip, the costs go down by up to 30 percent. The costs for lighter loads (up to 16 tons) will increase.

For the rolling highway on the Lötschberg-Simplon route, Hupac, BLS and SBB found a common operating company. Their share is 30 percent each, and the remaining 10 percent are reserved for the Italian FS and are in the hands of the SBB, for the time being. Unfortunately, the start of operation was delayed. Geological difficulties have delayed the works of the FS for the enlargement of clearances on the southern ramp of the Simplon. After termination, operation starts first with four daily train pairs between Freiburg im Breisgau and Basel in the



The heavy lorry tax, an element of uncertainty: does it benefit the railway?

With the international strategy of growth,

and bespoke solutions for the clients, the SBB steel themselves for competition in freight traffic.



north, and Domodossola and Novara in the south. From 2002, the offer shall be stepped up every year, depending on demand. With 21 train pairs a day, 1260 lorries can be conveyed through the Alps, 315'000 per year. On the existing services of SBB and Hupac, combined traffic of the rolling highway through the Alps has increased by 3.5 percent in the past year. Unaccompanied combined traffic, which makes even more sense logistically, registered an increase of no less than 18.8 percent.

System leader for single wagonloads

Also on the domestic market, SBB Cargo defends its position. In Swiss single wagonload traffic, SBB Cargo assumes its system leadership by further increasing productivity. Fine delivery until the clients' private sidings is performed by mobile shunting teams, flexibly and at low cost. Insofar as other railways are mandated with fine delivery in a certain region, it is assumed that they do so with a comparable productivity.

The agreements concluded last year between the SBB and the BLS have helped in clearing up the situation on the Swiss market. The cooperation agreement stipulates that SBB Cargo takes over the whole wagonload traffic from the BLS. As from June 2001, the SBB themselves manage production in the catchment area of the BLS, but purchase part performances from the BLS. As counterpart of the assignment of duties, the rolling highway over the Lötschberg and Simplon is operationally managed by BLS and Hupac. In blocktrain traffic however, both railways continue to make their own offers and are competitors on the market.

Higher productivity, more electronics

More efficiency increases competitiveness of SBB Cargo and helps to win market shares, which relieves the road, also desirable for ecological reasons. The unrelenting strong pressure on prices on the goods transport markets makes the increase of productivity a permanent task. In the past year, SBB freight traffic achieved new record performances, and this with a barely sufficient, in part even insufficient workforce. On 19th October for instance, for the first time over 100,000 gross tons traversed the Gotthard tunnel towards the south. On top of the generally strong traffic in the past year came the timber transports following the hurricane "Lothar" at the end of 1999.



Efficiency makes the rail mode competitive: trains, the longer the better

SBB Cargo continues to serve all the regions of Switzerland, improves efficiency, and will reduce the costs while maintaining quality standards.