



Alhambra Advisors

TOC
EUROPE

Building seamless, resilient Port-intermodal corridors

BUILDING A COMPETITIVE ADVANTAGE THROUGH PORT
INFRASTRUCTURE DEVELOPMENT

Rotterdam, 17th June 2025



Session agenda

1. From Port-Maritime and land supply chains towards intermodal corridors
2. Opportunities and challenges
3. Lessons learnt from ongoing European intermodal corridors
4. Conclusions and way ahead

Speaker

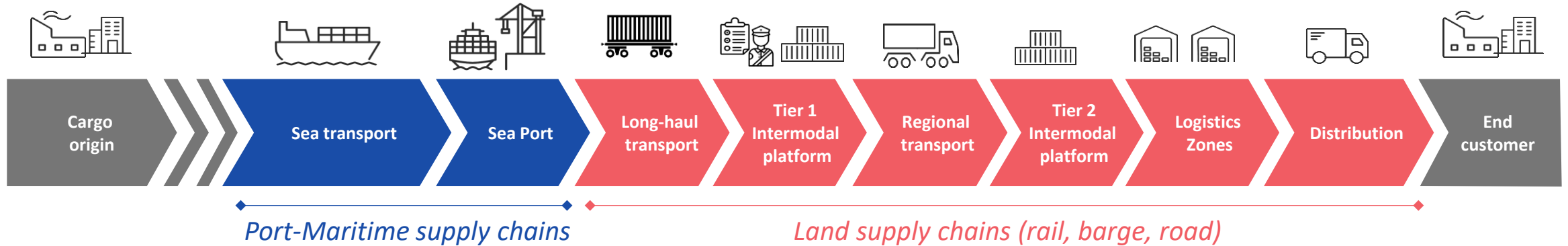


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MSc in Civil Engineering and Co-founder of Alhambra Infrastructure Advisors, where he leads the company's efforts in Logistics and Supply. Focus on the strategic planning of large-scale transport infrastructure, navigating complex multi-stakeholder environments. Participated in more than 70 projects globally, advising port, shipping and logistics operators, as well as to governments and international financial institutions. He has been involved in projects such as the Saudi Landbridge Railway Network and the SGR Corridor in East Africa.



Port-Maritime supply chains: towards full integration with land supply chains



Integration areas

Commercial	Integrated offering/product and One-Stop-Shop for end-customers
Operations	Intermodal Logistics and Freight forwarding becoming part of offering
Asset	Expansion and / or take-over of other assets / businesses in the land supply chain
Digital	PCS, TMS, logistics and other components integrated into digital corridors
Others	Insurance, customs, security,



Creating corridors: Improving port competitiveness through integration from legacy, atomized businesses

Opportunities

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1. **Improved Efficiency & Cost Reduction:** Smoother cargo flow and reduced delays, Lower transport and handling costs, Shorter dwell times at ports and terminals.
 2. **Enhanced Visibility & Coordination:** Real-time tracking across modes, Better forecasting and planning
 3. **Greater Flexibility & Resilience:** Easier rerouting during disruptions. Stronger response to global shocks.
 4. **Environmental Sustainability:** Encourages greener transport modes (e.g., rail), Reduces emissions and improves load efficiency.
 5. **Competitive Advantage:** Faster deliveries and better customer service, Stronger collaboration among logistics partners.

Challenges

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1. **Infrastructure Mismatch:** Ports may outpace inland networks. Poor last-mile connectivity increases delays.
 2. **Operational Coordination:** Misaligned schedules and terminal congestion
 3. **Regulatory & Institutional Barriers:** Customs delays and fragmented governance.
 4. **Digital Integration Issues:** Lack of real-time visibility and data standardization.
 5. **Environmental & Urban Constraints:** Emission limits and urban access restrictions.
 6. **Investment & Financing Gaps:** High infrastructure costs and uncertain returns.



EU Sample 1: North Sea Ports are increasing their participation in rail operations and inland ports to better serve its hinterland

Samples of Integrated supply chains promoted by North Sea Ports



- Rotterdam connects to the Betuweroute freight corridor, handling over 500 rail services weekly to Germany and beyond
- Antwerp-Bruges operates Railport Antwerp, coordinating single wagonload and block train services across Belgium and neighboring countries
- Hamburg's Hafenbahn manages 200+ km of internal rail, with over 50% of hinterland cargo moved by rail.
- HAROPA (Le Havre) co-invests in rail terminals and inland corridors, linking to Paris and the Benelux region



Sample 2: Mediterranean ports securing hinterland and increasing competitive position with North Sea ports

Samples of Integrated supply chains promoted by Mediterranean Ports



- Barcelona links to inland terminals in Zaragoza and Madrid, with gauge-changing infrastructure for cross-border freight
- Valencia co-develops inland rail terminals and is part of the TEN-T Mediterranean Corridor.
- Genoa participates in the Terzo Valico rail line to improve access to northern Italy and Central Europe
- Trieste operates rail services to Austria, Germany, and Hungary, benefiting from free port status and simplified customs
- Piraeus connects to the Thriasio logistics center and the Balkan rail corridor enabling efficient freight routes to Central Europe



Sample 3: Polish Ports aiming to become the gateway for Central and East Europe, while enhancing overall Polish competitiveness

Samples of Integrated supply chains promoted by Baltic Ports



- Gdańsk's Baltic Hub handles 500+ trains monthly; PSA's acquisition of Loconi Intermodal expands inland rail services
- Gdynia invests in rail terminal upgrades and connects to the TEN-T Baltic-Adriatic Corridor.
- Szczecin-Świnoujście modernizes rail access to serve Poland and Germany, supporting bulk and general cargo
- Police port is constructing a new direct rail link to connect with the national network by 2027



Sample 4: Container Terminal operators and Shipping lines are being a key driver of Ports' hinterland expansion (1/2)



- **Port Involvement:** Operates terminals in Barcelona, Rotterdam, and Felixstowe
- **Rail Participation:** Hutchison Ports has invested in rail terminals and inland depots, such as the Barcelona Terminal Marítima de Zaragoza (tmZ), which connects the port to inland Spain via rail



- **Port Involvement:** Operates terminals in Antwerp and Genoa, as well as Gdansk through its joint venture Baltic Hub
- **Rail Participation:** PSA is a co-founder of Rail port Antwerp, which coordinates rail freight ops within the port and connects to inland terminals in Belgium and Germany, and, since 2024, majority owner of Loconi Intermodal in Poland which connects Gdansk to key inland hubs



- **Port Involvement:** Active in Hamburg, Bremerhaven, and La Spezia
- **Rail Participation:** Eurogate owns and operates intermodal terminals and has stakes in rail operators such as Eurogate Intermodal, which runs block trains to inland Europe



Sample 4: Container Terminal operators and Shipping lines are being a key driver of Ports' hinterland expansion (2/2)



- **Rail Participation:** Maersk has developed its own rail freight services across Europe, including dedicated block trains from ports like Gdańsk and Rotterdam to inland hubs in Poland, Germany, and the Czech Republic
- **Strategic Value:** By controlling inland rail logistics, Maersk ensures reliability and visibility across the supply chain, supporting its integrated logistics model



- **Rail Participation:** Through its logistics arm CEVA Logistics, CMA CGM operates rail services from ports like Le Havre and Marseille to inland France and Central Europe
- **Strategic Value:** CMA CGM's rail operations support its sustainability goals and improve inland connectivity for its maritime customers



- **Rail Participation:** MSC operates Medlog, its logistics subsidiary, which manages inland terminals and rail services across Europe. MSC is active in rail corridors from Valencia, Trieste, and Antwerp to inland destinations
- **Strategic Value:** MSC's investment in rail infrastructure supports its goal of offering door-to-door services and strengthens its position in intermodal logistics



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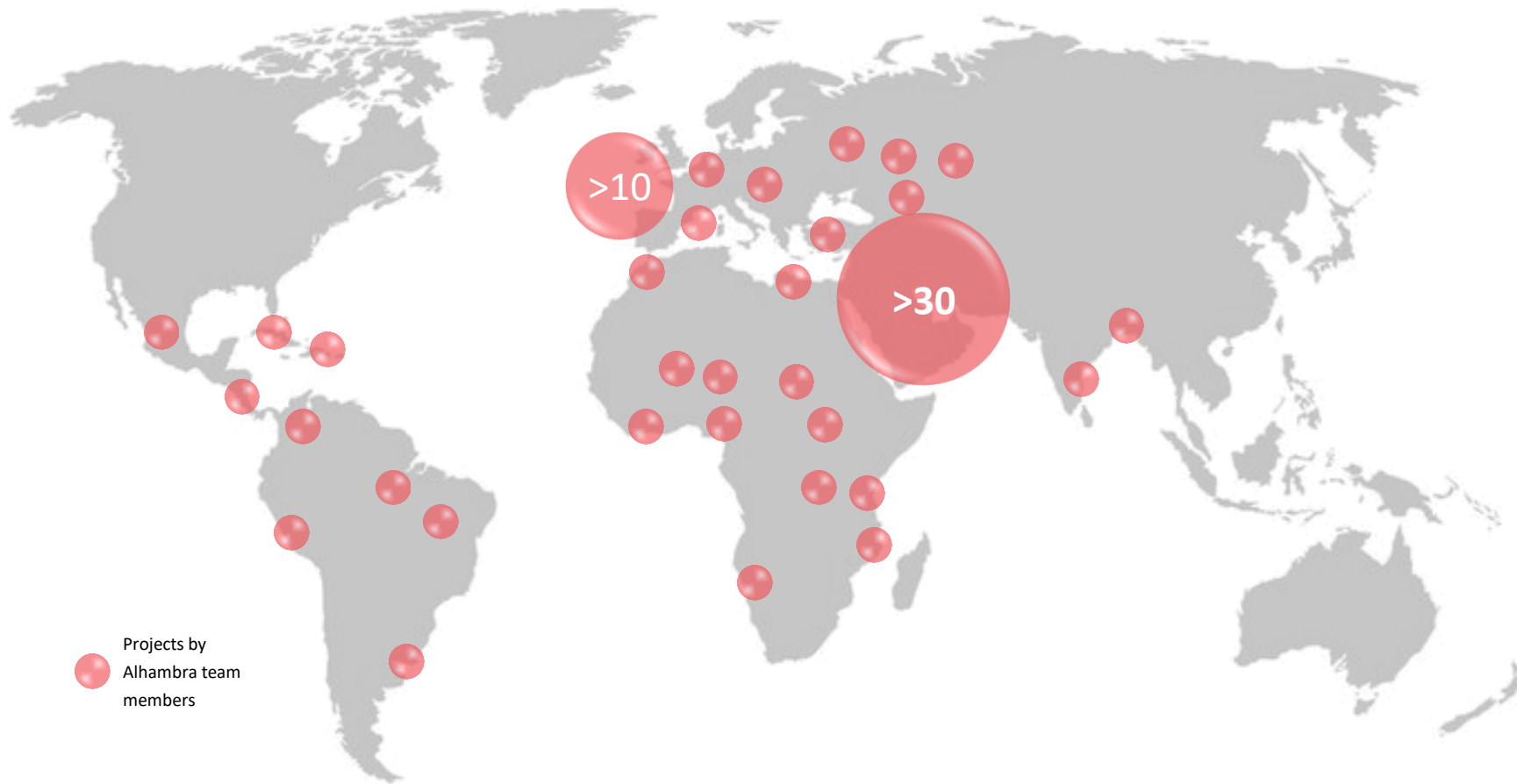
Cross-functions

Alhambra Infrastructure Advisors is a boutique consulting firm focused on transportation and infrastructure. We have been established in 2023, gathering the best talent in the industry to continue supporting the growth of our clients.

We cover all transportation sectors: Aviation, Ports and Maritime, Railways, Roads and Urban Mobility, and Logistics and Supply Chain. We complement our expertise with a broad spectrum of social infrastructure: Municipal services, Housing, Education and Healthcare. Each sectorial specialties are supported by our different cross-functions: Corporate and Public sector, Transactions, and Real Estate



Our team has participated in more than 60 projects focused on railways, logistics and supply chain in the past 5 years



Main clients





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