

Fredericia – as hub for international logistics – a growth scenario

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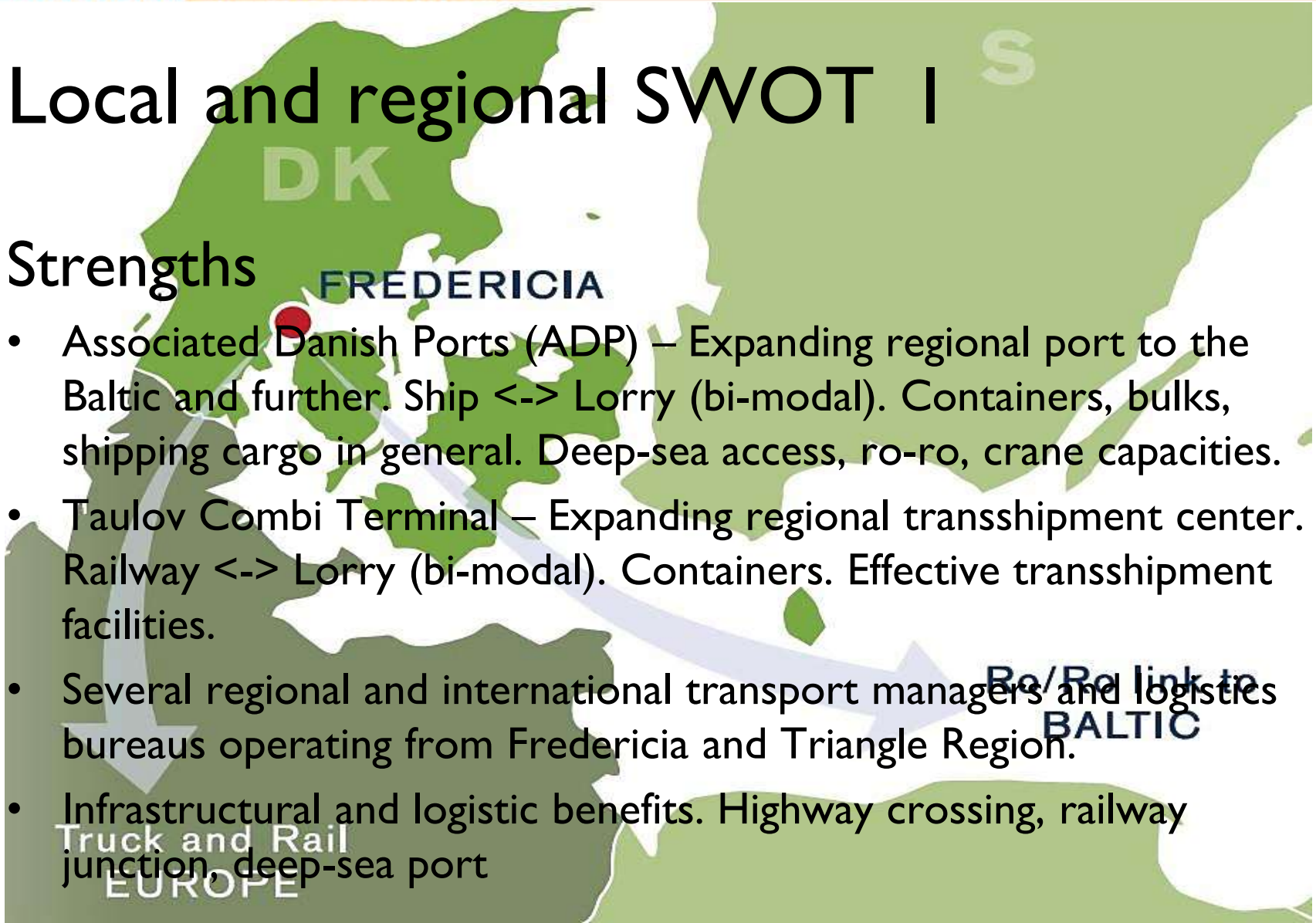
Topics

- Fredericia as hub
 - Local and regional SWOT - is 'combi' for real?
 - Growth potentials, challenges and tasks
 - Picking the winners ...

Local and regional SWOT I

Strengths

- Associated Danish Ports (ADP) – Expanding regional port to the Baltic and further. Ship <-> Lorry (bi-modal). Containers, bulks, shipping cargo in general. Deep-sea access, ro-ro, crane capacities.
- Taulov Combi Terminal – Expanding regional transshipment center. Railway <-> Lorry (bi-modal). Containers. Effective transshipment facilities.
- Several regional and international transport managers and logistics bureaus operating from Fredericia and Triangle Region.
- Infrastructural and logistic benefits. Highway crossing, railway junction, deep-sea port



Local and regional SWOT II

Weaknesses

- Strategic cooperation between dominant players
- Political follow-up and development interest from local and regional political bodies
- Obsolete local and regional infrastructures connecting the two bi-modal logistics centres
- Two bi-modal centres optimise markets separately
- Missing large and efficient container handling facilities
- Limitations in commercial port enlargement possibilities
- Air freights not integrated in concepts

Local and regional SWOT III

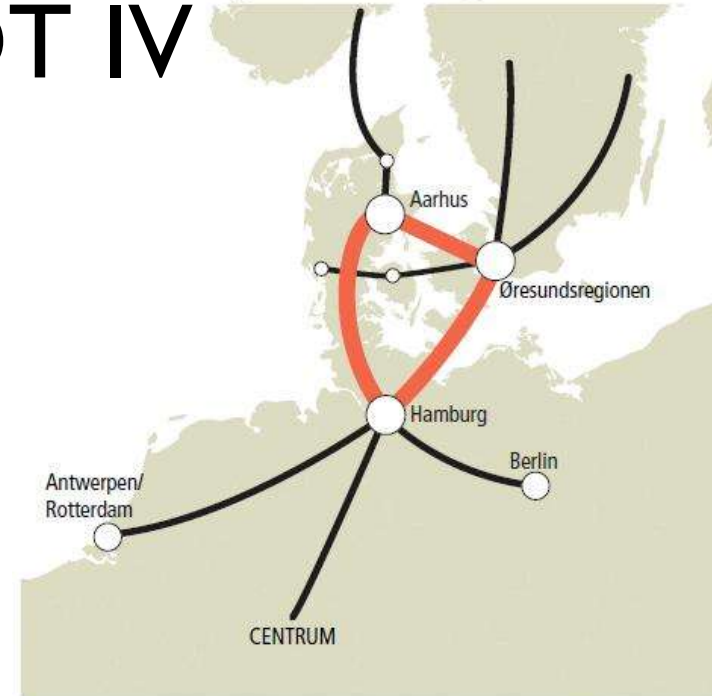
Opportunities

- Attract industrial operators with needs for growth in logistics and transports using Fredericia assets. Examples:
 - Oil and gas refinery locally
 - Major beverage and food companies locally and regionally
 - Major car-import and car-logistic companies locally and regionally
- Utilise unique access to Baltic ports, railway and highway infrastructure
- Sustainability thinking makes near-by landing of containers in order to reduce CO2 emissions attractive
- National infrastructure development (goods railway, short-cuts, tunnelling), favours regional a western tri-modal hub I Denmark
- Local and regional political efforts to ensure Fredericia as an east-west hub for Balticum, Scandinavia and Eastern Europe

Local and regional SWOT IV

Threats

- Restructured goods handling flows (Fehmern Belt tunnel, Hamburg, Bremerhaven, Rotterdam)
- Metropole Center development (Oeresund-region, Aarhus, Hamburg, Berlin, Stockholm)
- Lack of development of highly efficient development cross-boarder railway capacity in DK
- No-growth economy in EU



Afgørende faktorer ved valg af lokalisering

Procentdel der mener, at disse faktorer er „absolut væsentlige“	Den industrielle sektor	Detailhandel og distribution	Service-sektoren
Tilgængelighed til kvalificeret arbejdskraft	61%	55%	54%
Let adgang til markeder og kunder	60%	61%	60%
Kvaliteten af telekommunikation	52%	46%	63%
Transportforbindelser med andre byer og internationalt	61%	45%	45%

Kilde: Fremtidens mobilitet

Our challenges and tasks I ?

Short term – joint policy making

- Analyse and utilise local and regional strengths in cooperation with appropriate business
- Strive to promote coordinated and joint business development thinking amongst competing main players in order to create competitive and intelligent logistic solutions
- Ensure local and regional political attention and actions. And hopefully on national as well as on EU levels
- Lobbying to ensure governmental attention to development of Fredericia as combi-hub for Scandinavia, the Baltic and Eastern Europe

Our challenges and tasks II ?

Midterm – Business strategies

- Attract more large businesses to establish in Fredericia area – based on need for competitive and intelligent logistic solutions
- Attract more international ro-ro container traffic and international container transshipments
- Develop combined flows of goods handling by companies with specialised skills (forwarding, shipping, rail, air freight). Cross-company partnering to produce effective logistic solutions
- Strive to optimise on energy savings and environmental sustainability – according to EU- and national goals
- Develop Scandinavian and Baltic and East-European markets

Our challenges and tasks III ?

Long term – Clustering

- Ensure continued local and regional political attention and action. Hopefully on a national level as well as on EU levels, too
- Invest in use of multi-modal transports optimising logistic tools (understood as end-user ‘do not need to care’). By ordering customers will be secured cheapest and best solution, according to requirements – using cross-bridging software platforms to optimise loads on transporters – no matter what kind. (40% or more at present unused free space on trucks – driving round Europe)
- Operational partnering amongst larger industrial players and regional operators in logistics and shipping aimed at Scandinavian and Baltic and East-european markets
- Strategic partnering with Hamburg and international operators on overseas shipping

Picking the winners ...

- Local and regional growth – utilising positions of strength – takes more than just improving general frameworks. It takes targeted concerted action – and permanent dialogue ...
- *”Those who will start intensive talks and surveys of opportunity - collaboration across their own interest and seek long-term best interests regardless of current competitive situation and interests” (My point of view)*
- Fredericia Business Association was here - to promote a dialogue-based approach to create growth strategies