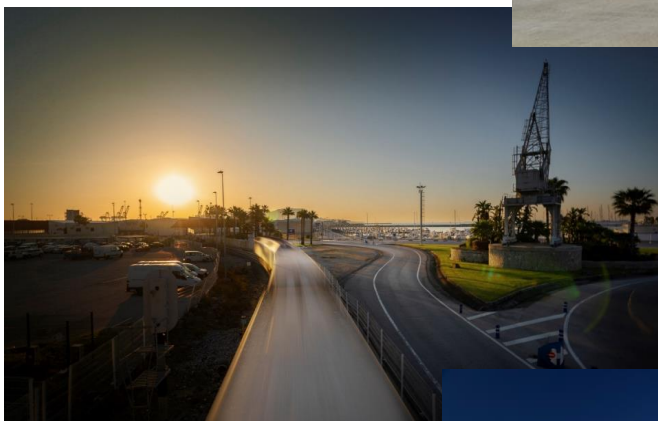




ATLANTIC RAIL FREIGHT CORRIDOR
MEETING OF THE EXECUTIVE BOARD
NOVEMBER- 2025



Terminal Advisory Group presentation
Luis Núñez, TAG spokesman
Head of Strategy & European Affairs Algeciras Bay Port Authority



Update on terminals in Atlantic RFC – QUICK VIEW

	PORTUGAL	SPAIN	FRANCE	GERMANY
8 PORTS	<p>2</p> <p>Port of Aveiro Port of Setubal Port of Sines, Port of Lisboa and Port Leixões.</p>	<p>4</p> <p>Port Of Algeciras Port Of Huelva 24.313 TEUs Port of Sevilla Port of Bilbao</p>	<p>7</p> <p>Port of Le Havre Port of Strasbourg Port of Paris (Haropa), port of Nantes, Port of La Rochelle, Port of Bordeaux and Port of Bayonne</p>	
50 INLAND TERMINALS	<p>14 Operational Terminals</p> <p>VALONGO; VILA NOVA DE GAIA; PAMPILHOSA; MANGUALDE; GUARDA; ALFARELOS; ENTRONCAMENTO; TVT; BOBADELA; CONTEPARQUE; ALB; SPC; ALCONT; POCEIRÃO.</p>	<p>13 Operational Terminals</p> <p>IRÚN; PASAIA, JÚNDIZ; BILBAO; NOAIN; TERCAT; VALLADOLID; ZARAGOZA; ABROÑIGAL; VICÁLVARO; COSLADA, MAJARABIQUE TEUs: 18.032 TEUs, CÓRDOBA EL HIGERÓN, SAN ROQUE; 3 NEW TERMINALS: Badajoz, Mérida, Navalmoral de la Mata</p>	<p>10 Operational Terminals</p> <p>LE BOURGET; NOISY-LE-SEC; WOIPPY; HAUSBERGEN; VALENTON; SAINT-PIERRE-DES-CORPS; COGNAC; BORDEAUX – HOURCADE; BAYONNE – OUGUERRE; HENDAYE; AMBROGIO</p>	<p>10 Operational Terminals</p> <p>BECKINGEN PUHL; LUDWIGSHAFEN KTL; LUDWIGSHAFEN CONTARGO; MANHEIM CONTARGO; MANHEIM DP WORLD LOGISTICS; MANHEIM-HANDELSHAFEN DUSS; KIRKEL TERMINAL; GERMERSHEIM DP WORLD LOGISTICS; SAARBRUECKEN</p>



Update on terminals in Atlantic RFC – QUICK VIEW

RFC 2024 FIGURES

KTL Kombi-Terminal Ludwigshafen GmbH



**NACHHALTIG
& STARK** im
Kombinierten
Verkehr

Rail traffic in 2024

TEU: ca. 487.000
Finished vehicles: ca. 150.000
Railway circulations: ca. 7.360

SETUBAL PORT, Portugal



Rail Traffic – 2024

TEU handled: 0
Finished vehicles handled: 130 008
Number of railway circulations (entries + exits): 1 340

EXTREMADURA AVANTE LOGÍSTICA



Moving forward with the 3 terminals and focused on goods ORIGIN, DESTINATION or TRANSIT in Extremadura

TMZ – Zaragoza, Spain



Rail traffic in 2024

TEU handled = 110.054 (teus ferroviarios)
Finished Vehicles handled = 0
Number of railway circulations (entries + exits) = 2127

Alsa Rail – Algeciras, Spain



ADIF INTERMODAL TERMINAL (ATLANTIC CORRIDOR)	Trains received/dispatched	Manipulated UTIs
TTM from Zaragoza	4.447	38.982
TTM from Valladolid	1.678	0
TTM de Madrid - Abroñigal	2.692	81.065
TTM León	3.239	3.700
TTM Bilbao	4.199	20.292
Total general	16.255	144.039



Rail traffic in last 12 months

TEU handled = 16.882
Number of railway circulations (entries + exits) = 845
Scenario of works and major disruptions to the network

Update on Algeciras-Zaragoza RAILWAY Connection

Renovation of the Bobadilla-Algeciras Railway Line

Strategic Role

This line is crucial for access to the Algeciras Port and connects the Atlantic and Mediterranean Corridors.

It supports the Algeciras-Zaragoza Rail Motorway, aiming to increase freight traffic.



Investment and Upgrades

Master Plan includes over **470 million euros to renovate and electrify 176 km of track**, aligning with European standards for interoperability.

ACTUACIONES FERROVIARIAS Actuaciones en el itinerario Algeciras - Zaragoza



92 ACTUACIONES PREVISTAS EN ESTRUCTURAS

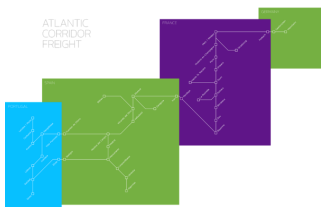
- 43 Túneles
- 41 Pasos superiores
- 8 Puentes metálicos

TÚNELES

Córdoba - Sta. Cruz de Mudela	13
Túnel de Torralba	1
S. Fdo. Henares - Sta. Mª Huerta	7
Sta. Mª Huerta - Calatayud	7
Calatayud - Ricla	11
Ronda - Algeciras	

PASOS SUPERIORES Y Puentes METÁLICOS

Bobadilla - Sta. Cruz de Mudela	115
Sta. Cruz de Mudela - S. Fdo. de Henares	108
S. Fernando Henares - Sta. Mª Huerta	71
Sta. Mª Huerta - Calatayud	67
Aranjuez	
Puentes Metálicos	



Renovation of the Bobadilla-Algeciras Railway Line



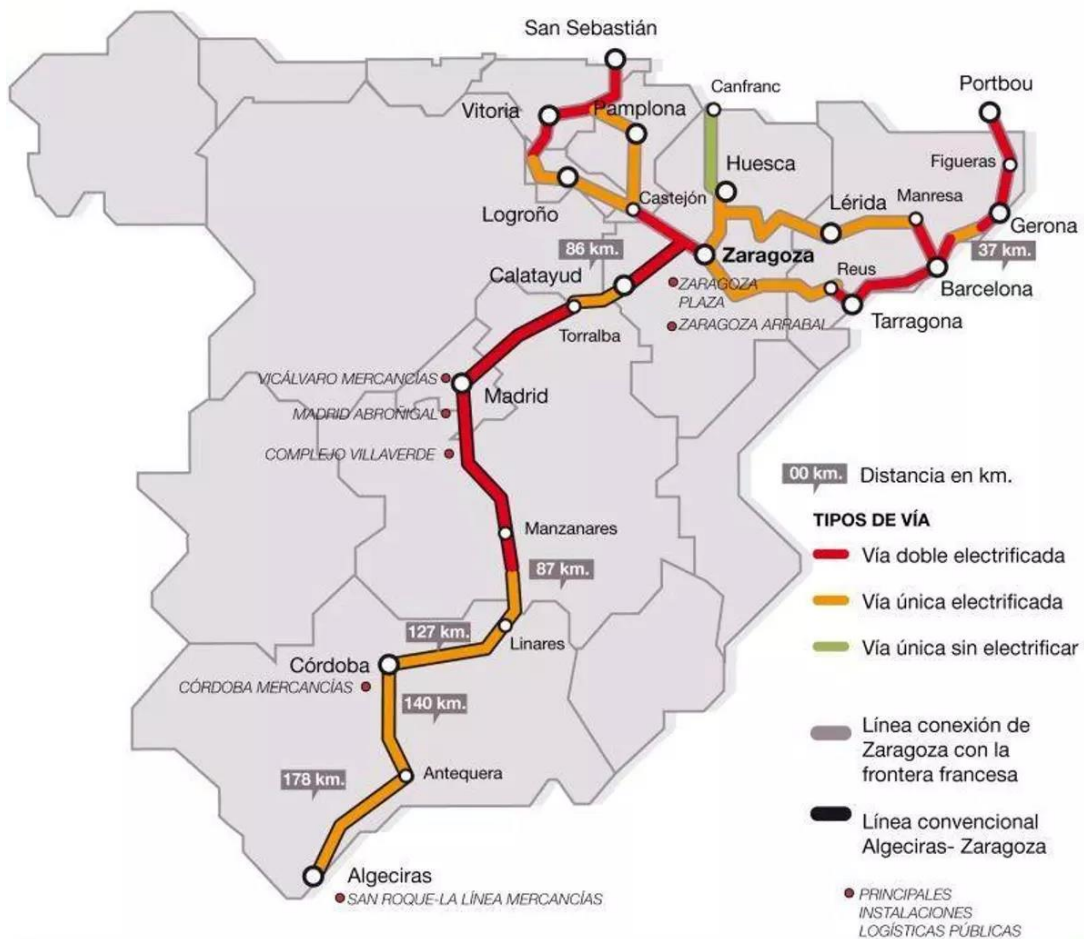
Track and Infrastructure Improvements: Ongoing work on the Bobadilla-Ronda section; renovations on Ronda-Cortes-San Pablo completed; work continues on San Pablo-Almoraima.

Electrification and Signaling: Electrification of key sections and signaling system upgrades are being implemented to enhance safety, efficiency, and speed.

Port of Algeciras Enhancements: Expansion of railway terminals and a new technical facility at Botafuegos will boost rail freight capacity.

The Ministry of Transport supports these upgrades, enhancing rail freight capacity to support regional decarbonization and sustainable transport in southern Europe.

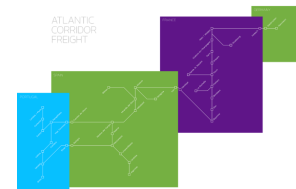
EL CORREDOR ALGECIRAS.ZARAGOZA



Timeline for Gauge Expansion on Algeciras – Zaragoza Freight Axis

Actions updated Timeline:

- **Line 200, Madrid–Zaragoza:** Tunnel and bridge closures from April 2025 to January 2026 (7 months + 1.5 months for service readiness).
- **Line 400, Madrid–Córdoba:** Tunnel and bridge closures following Madrid–Zaragoza, from January to October 2026 (7 months + 1.5 months for service readiness).
- **Line 420, Algeciras–Bobadilla:** Includes stabilization of Almargen slope, tunnels, and bridges. Closure will overlap with Line 400, from January to November 2026 (10 months).

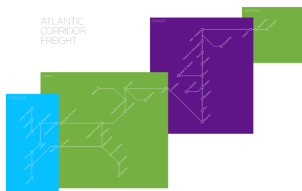
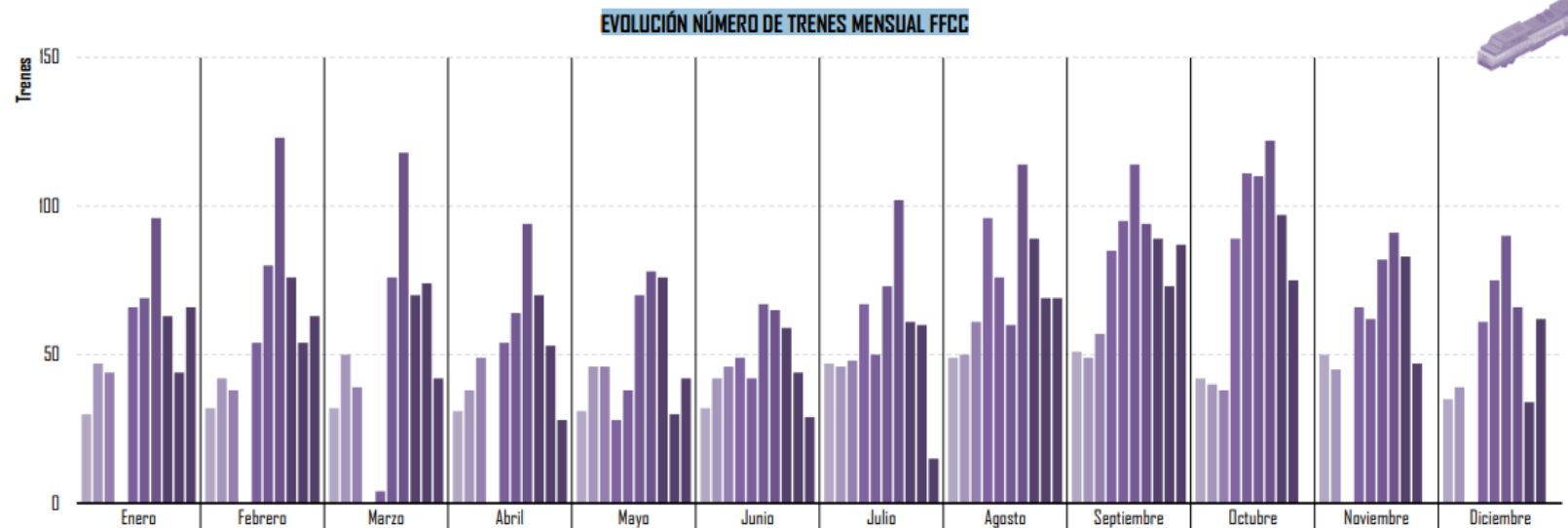
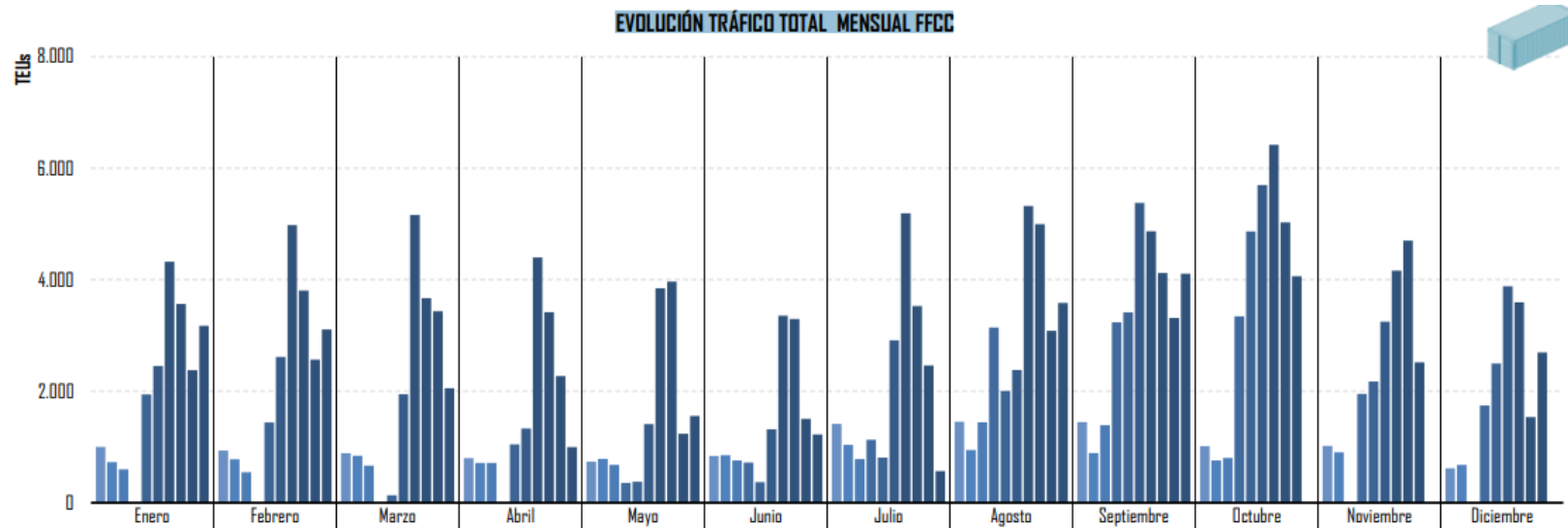


2025/2024 Monthly TEUs:

- ❑ **The first quarter of 2025** shows growth compared to 2024.
- ❑ **April to July 2025** presents a significant drop compared to 2024.
- ❑ **August and September 2025** are picking up the pace with notable increases.

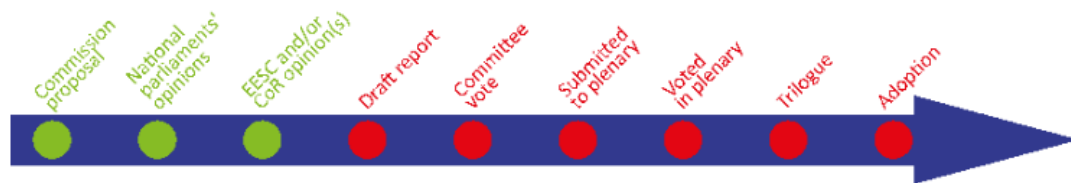
2025/2024 Monthly trains:

- ❑ **January and February 2025** show significant growth compared to 2024.
- ❑ **March to July 2025** show marked drops in the number of trains.
- ❑ **August remains stable, and September** improves compared to the previous year.



EU Rail Capacity Regulation (COM (2023) 443 final – Regulation 2023/0271)

- ❑ The EU wants a single, digital railway capacity management system (ENIM Network).
- ❑ Aim of the regulation: to optimise the use of capacity, increase international traffic and ensure interoperability.
- ❑ Who it affects: Infrastructure Managers (IMs), Service Facility Operators (OIS), Shippers, Ports.



What it means for the Atlantic Corridor



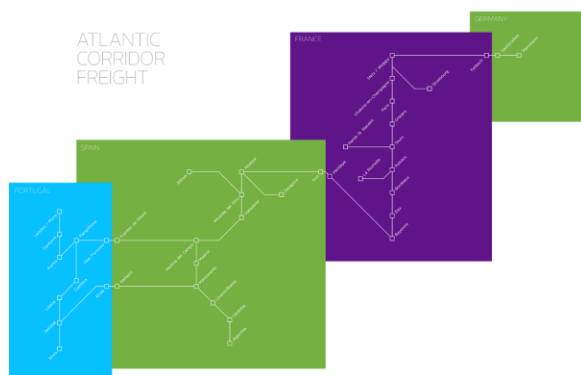
- Multi-network coordination (ADIF – IP – SNCF Réseau).
- Digital integration and real-time visibility of terminal capacity.
- Dynamic adjustment of paths and slots (affects port train planning).
- Review of ADIF's Network Statement.

Article 29

- Mandatory IM–OIS cooperation for joint applications for track + installation capacity.
- Digital "one-stop-shop" for terminal paths and slots.
- Harmonized data exchange under ENIM standards (formats, APIs).
- Mandatory alternatives if the initial application does not fit.

Listed in the Network Statement of Subject Facilities.

- Benefit: less friction, integrated planning.
- Risk: loss of terminal autonomy if you do not participate in the rules.



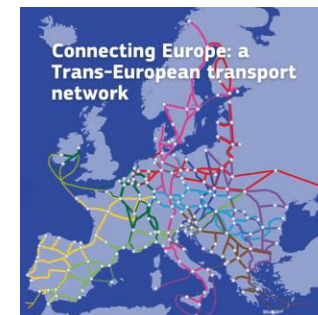
Article 39

- IM may change or withdraw assigned rights for operational reasons or in the public interest.
- No clear conditions or obligation to compensate.
- Risk of contractual uncertainty for port trains linked to maritime calls.

ESPO Position



- Ports = active partners, not simple ones consulted.
- Creation of a Ports/Facilities Advisory Group with the right to consent in ENIM.
- Support for modal shift and freight train priority.
- Demand a balance between IM and OIS transparency.



European Ports & RFC

- Defend "port consent" in ENIM decisions.
- Follow up ADIF-IP-SNCF-terminals technical committee.
- Promote priority of goods in congested sections.
- Support in the digital roadmap design (2025-2029) interoperable with RNE.
- Prepare briefings to shippers on contractual impacts.

Opportunities and Risks

Opportunities

- Improved interoperability
- Greater predictability for shippers
- Digital boost and one-stop-shop
- Rail Freight prioritization



Risks

- Lack of port voice in ENIM
- Unilateral reassignments (Art. 39)
- Cost of IT adaptation and reporting
- Complexity in multinetwork governance



Challenges:

Adapting the TEN-T Network to new challenge:

◆ Impact of Climate Change on TEN-T

- Increase in extreme events: heat waves, torrential rains and coastal phenomena.
- Infrastructures at risk require robust adaptation strategies.

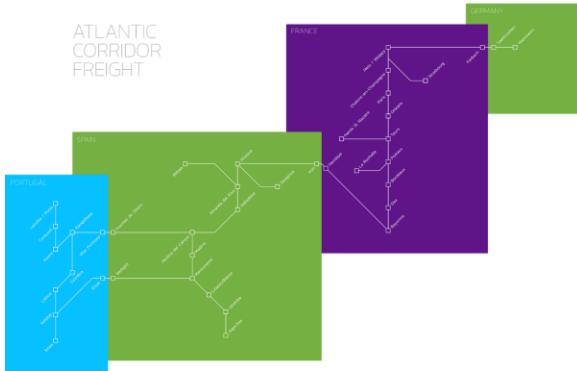
◆ Resilience Strategies

- Development of local indicators and vulnerability analysis.
- Integration of resilient materials and mitigation strategies in construction and maintenance.

◆ **Maintain connectivity, minimize disruptions and strengthen the safety and efficiency of European transport.**

◆ Military Mobility



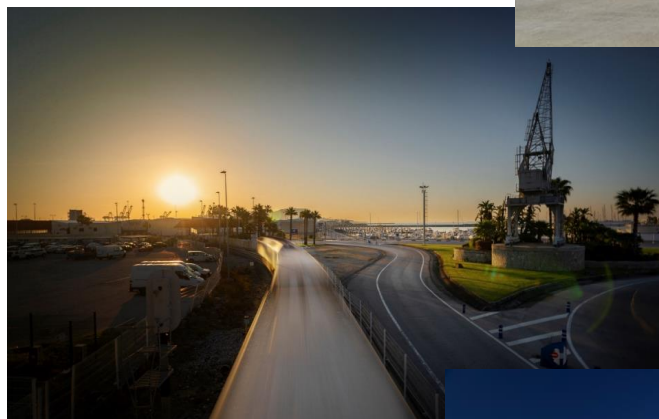


	Current TEN-T Requirement	Proposed Adjustment for Military Mobility (MM)
Electrification	Required, aligned with MM	Complete electrification and harmonize traction currents by 2030; keep diesel fallback
Track Gauge	1435 mm for new lines	Ensure full compatibility across all MM corridors
Axle Load	22.5 t/axle (Class D)	Maintain; consider max weight per meter with NATO
Train Length	740 m standard	Adapt sidings, loops, and terminals to 740 m
Loading Gauge	P400 (intermodal)	Upgrade to Military Envelope M (GB+) for large military vehicle
Minimum Speed	100 km/h freight / 160 km/h passenger	Reliability prioritized; Military Envelope M max speed = 80 km/h
ERTMS	Mandatory deployment	Maintain fallback systems; allow cross-border traffic without ERTMS if needed
Dwell Time & Delays	Not formally required	Improvements in punctuality and traffic management enhance MM efficiency
Alternative Routes	Not specified	At least two routing options per military connection, electrified and 22.5 t/axle
Diesel Refueling Facilities	Many dismantled	Maintain or redevelop to ensure operational readiness
ETCS & FRMCS	Not explicitly in Dual-Use Act	Include for MM funding eligibility
Sidings at Military Sites	Limited	Develop/upgrade sidings at critical MM locations
Dual-Use Terminals	Insufficient	Adapt with cranes, ramps, and yards
Safety & Security	Civil standards	Reinforce with lighting, fencing, surveillance
Multimodal Hubs	Not adapted	Prepare for military operations
Special Equipment	Not listed	Define list (cranes, trailers, lifting gear, etc.)
Port-Rail Digitalization	Needs improvement	Digitalize, enable 740 m trains, integrate rail planning in port development
Integrate Rail Planning in Port Development		



THANKS!

proyectoseuropeos@apba.es



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