INTERNATIONAL UNION OF RAILWAYS

UIRR INTERNATIONAL UNION FOR ROAD-RAIL COMBINED TRANSPORT



2026 Report on Combined Transport in Europe

Webinar starts at 10:30

November 20th, 2026

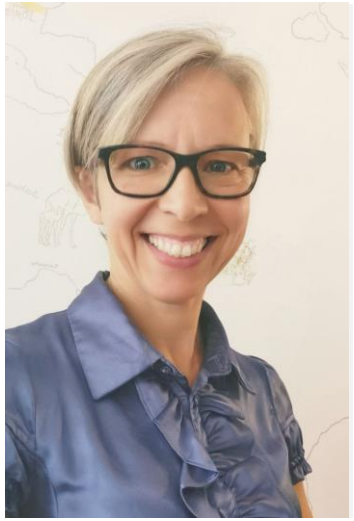
10:30	Welcome of the participants
10:35	Welcome by Ralf-Charley Schultze, UIRR Director General
10:45	Keynote: Why better data on intermodal transport is important and what we do about it? Maria Koidu EU Directorate-General for Mobility and Transport - Policy Advisor Transport
11:05	Perspective by Bertrand Minary, UIC Director Freight & Passenger solutions
11:15	CT report 2026
11:55	Innovation as a response to Challenges and Opportunities in Multimodal Transport: The B-TC – BASF Class Tankcontainer Presenter: Samer Ghandour
12:25	Concluding remarks

Welcome



Ralf-Charley Schultze
UIRR Director General

Keynote: Why better data on intermodal transport is important and what we do about it?



Maria Koidu
EU Directorate-General for Mobility and transport
Policy Officer Transport

Perspective



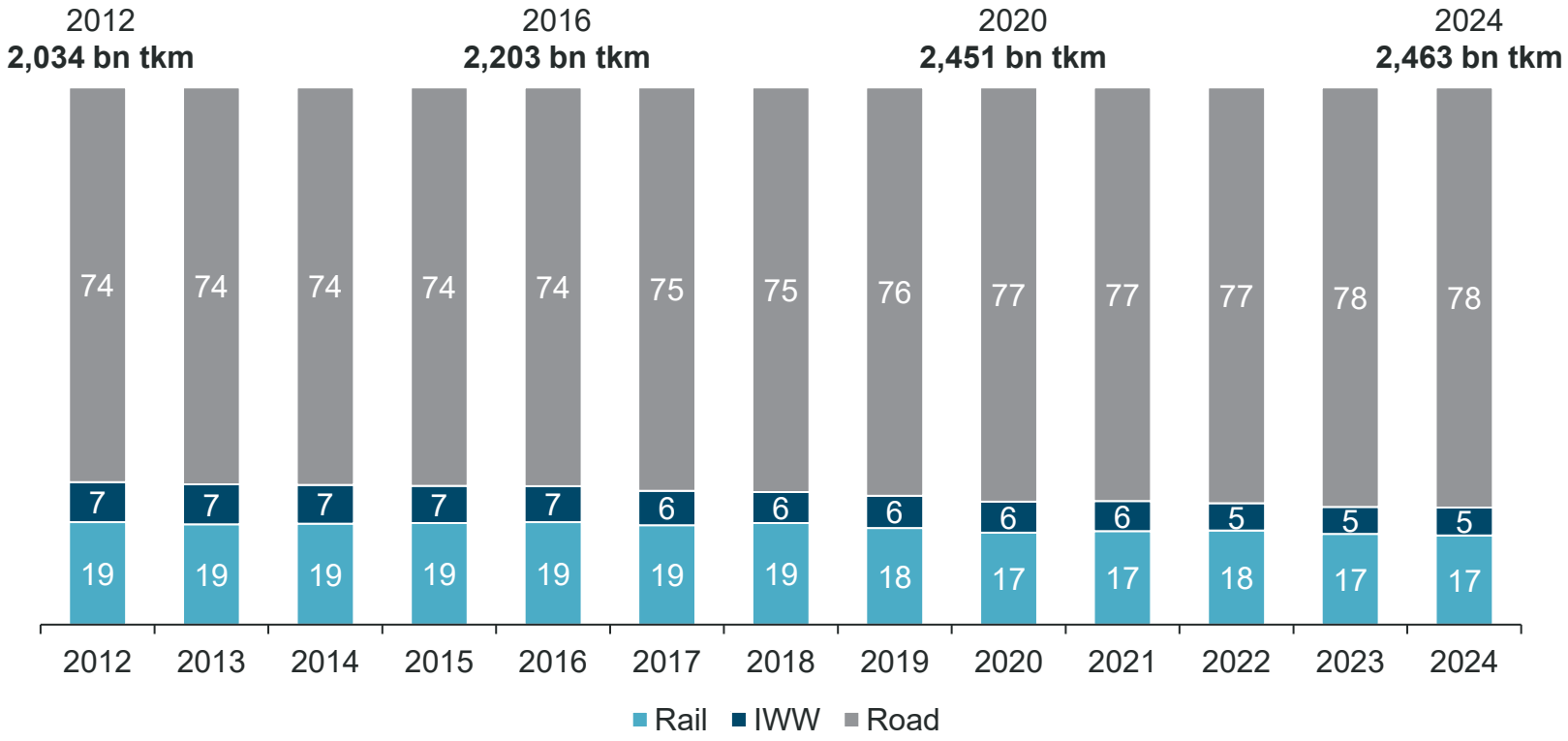
Bertrand Minary
UIC Director Freight & Passenger solutions

CT Report 2026

Alexander Labinsky
SCI Verkehr – Senior Consultant

The modal share of rail freight stabilised thanks to Combined Transport but needs further action to reach the 30% target of the European Union

Development of modal split of European freight transport[1]
(% of tkm)



- The European Union has set ambitious targets to increase the rail share to 30% by 2030 as part of its climate goals. **It will be challenging to reach this target** without substantial changes and improvements to the current supposedly single European transport system – and a substantial shift from road to other modes such as rail and inland waterway.
- After a slight decline from 2013 to 2020, **the share of rail freight in the European transport market has stabilised ever since, thanks to the development of Combined Transport.** However, at 17%, only half of the 2030 target has been reached in 2024, indicating a need for further action.
- At the same time, **inland waterway navigation (IWW) lost market share.** This was caused by a decline in absolute terms, which started after the 2018 drought on the Rhine and is mainly driven by the loss of coal transport. IWW did not recover in the aftermath, resulting in a decrease for IWW from 7% to 5%.

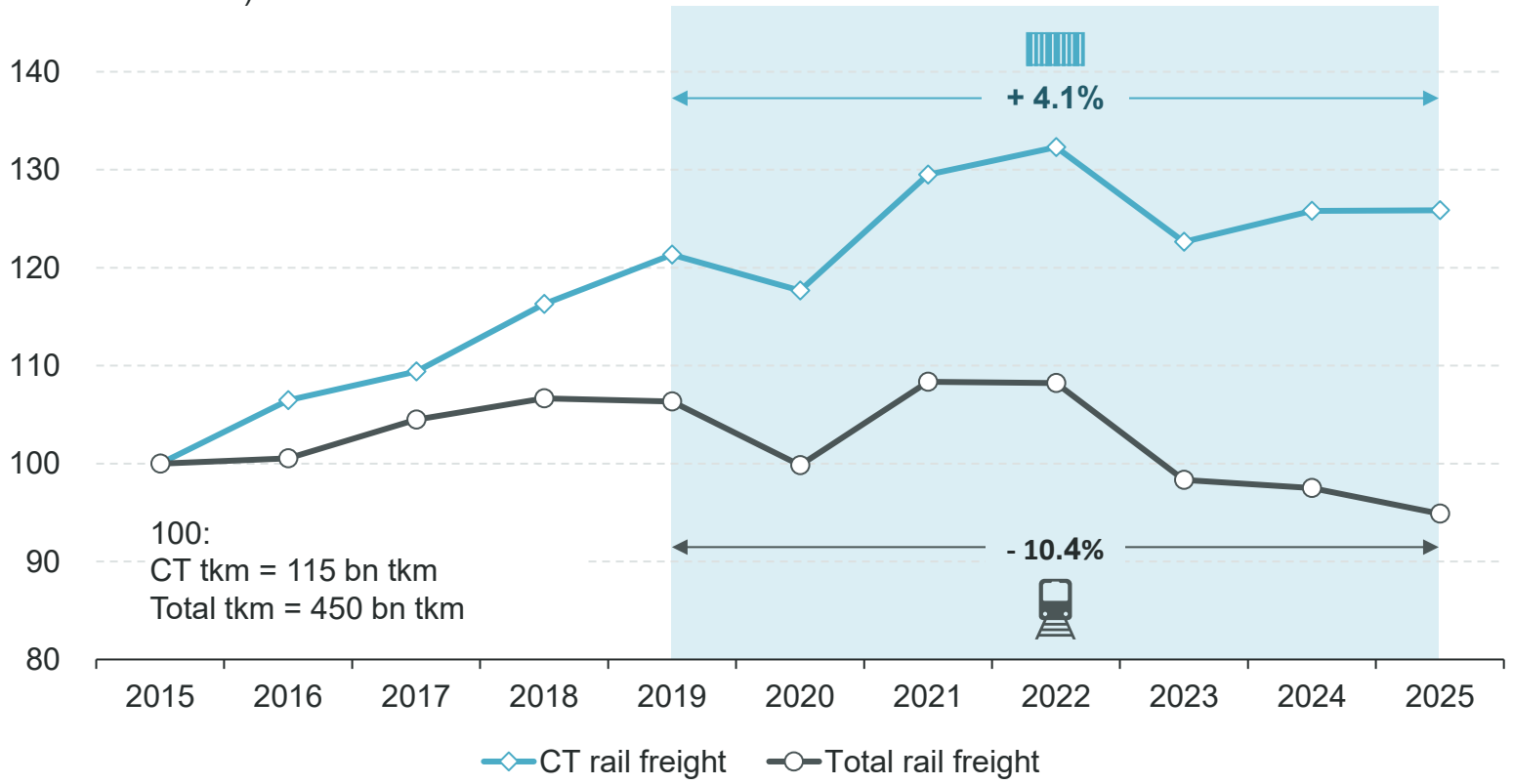
Source: Eurostat tran_hv_frmod (share); road_tert_go (road), rail_go_total (rail), iww_go_atyve (iww) as of 23/7/2026

1: 2025 not yet available due to missing data for road freight transport

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Combined Transport based on rail grew by over 4% between 2019 and 2025, while the total rail freight market decreased

Development of CT and total rail freight transport performance
(Index: 2015 = 100)



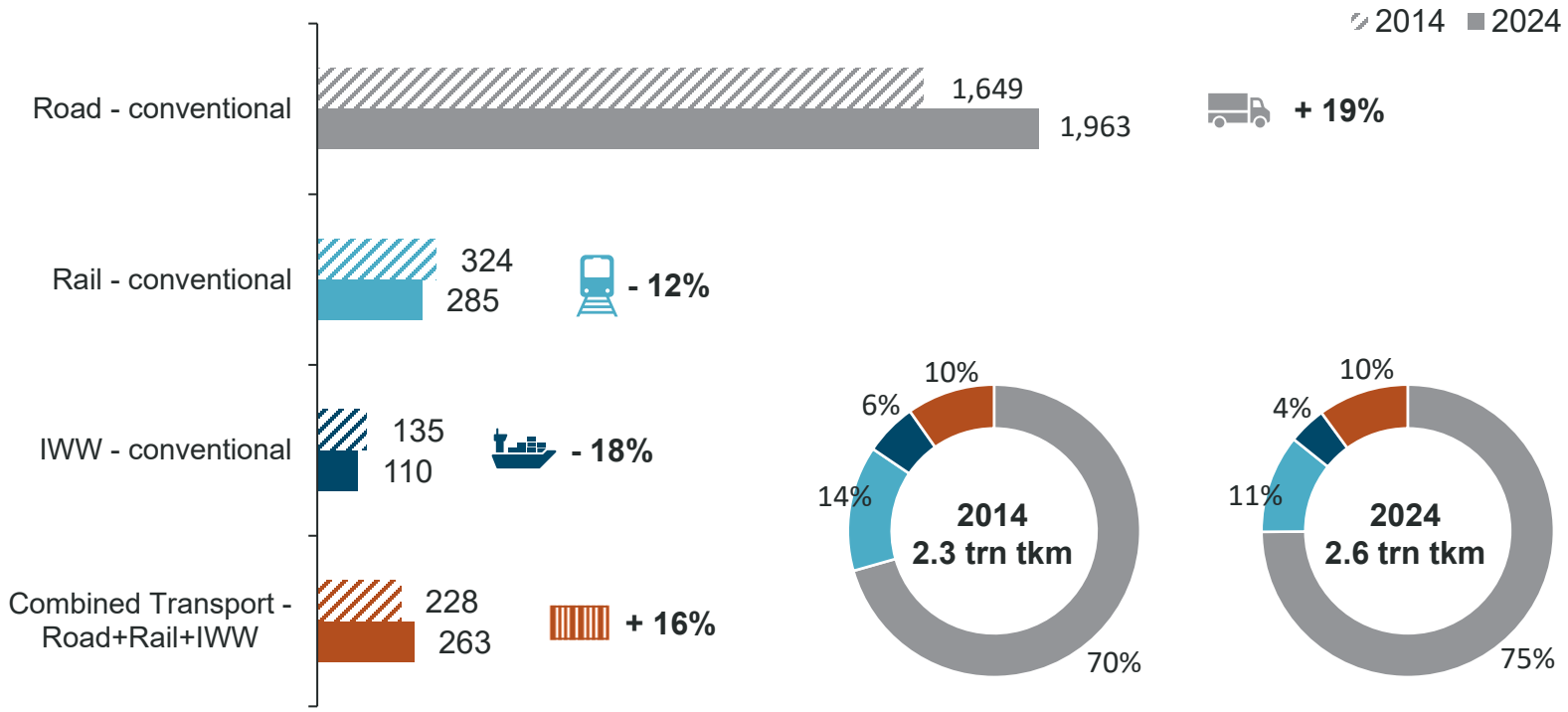
Source: Eurostat rail_go_grpgood as of 28/7/2026; SCI Multiclient Study "The European Intermodal Rail Freight Market 2026"

- Total rail freight transport performance grew by +8% in absolute terms between 2015 and 2022. But **in 2023, rail freight performance decreased by almost -10%**, mostly due to a combination of inflation and a slowing economy. Both factors were caused by the energy crisis that emerged in the aftermath of the Russian invasion of Ukraine.
- At the same time, **Combined Transport based on rail grew by +32% between 2015 and 2022,** with only a slight decline in 2020. Despite a sharp decrease of -7% in 2023, CT grew by +4.1% between 2019 and 2025, increasing its share of total rail freight from 23% in 2019 to 34% in 2025.
- **The recovery of rail freight performance is negatively affected by capacity restrictions on the network.** Line closures for maintenance works can severely affect rail freight performance as experienced in Germany or Italy. Unexpected incidents can also affect capacity, as demonstrated by the closure of the Gotthard rail tunnel following a derailment.

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Combined Transport is the key freight segment to keep rail freight competitive with road transport

Development of modal split of Combined Transport and total European freight transport
(billion tkm)



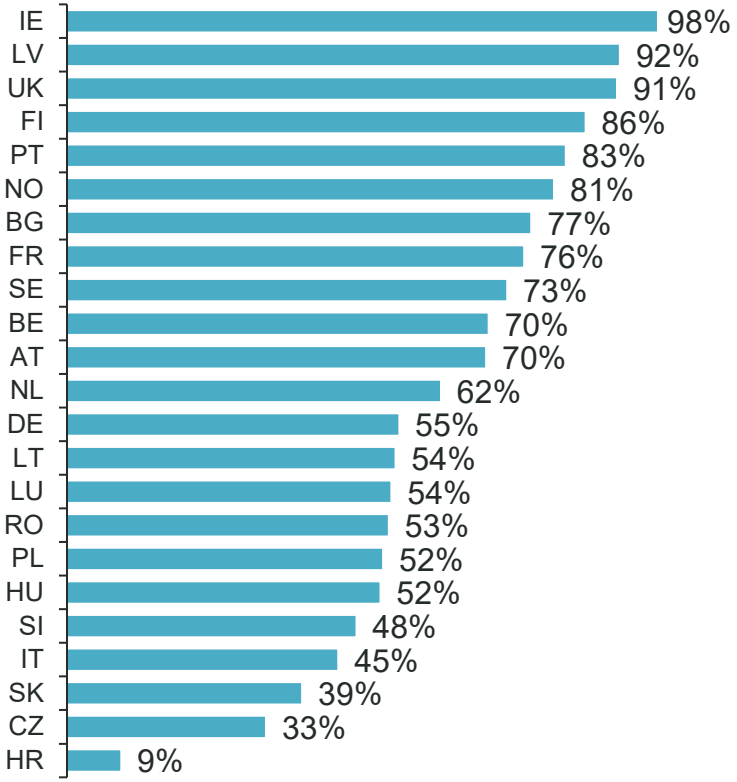
- Despite a challenging market environment, **Combined Transport defended its market share of 10% of the European transport market** against road transport, which grew by almost 20% between 2014 and 2024 and gained 5 percentage points of market share.
- **Without this growth for the CT segment, the non-road sector would have slipped further behind road transport**, as conventional rail and IWW both lost transport volume since 2014, despite a growing transport market.
- This is caused by differences in the markets, with road transport driven by on-time logistics of small shipments, whereas **conventional rail and IWW depend on bulk logistics of heavy goods, like coal and petroleum** which will be phased out in coming years.
- **CT combines the advantages of small shipment sizes with the cost advantages of bulk transport**, providing an alternative to road transport over longer distances.

Source: SCI Verkehr based on Eurostat rail_go_grpgood as of 26/8/2026; Eurostat iww_go_atygo as of 26/8/2026; Eurostat iww_go_actygo as of 26/8/2026; Eurostat road_go_ta_tott as of 26/8/2026; Eurostat tran_im_uroad as of 26/8/2026; SCI Multiclient Study “The European Intermodal Rail Freight Market 2026”

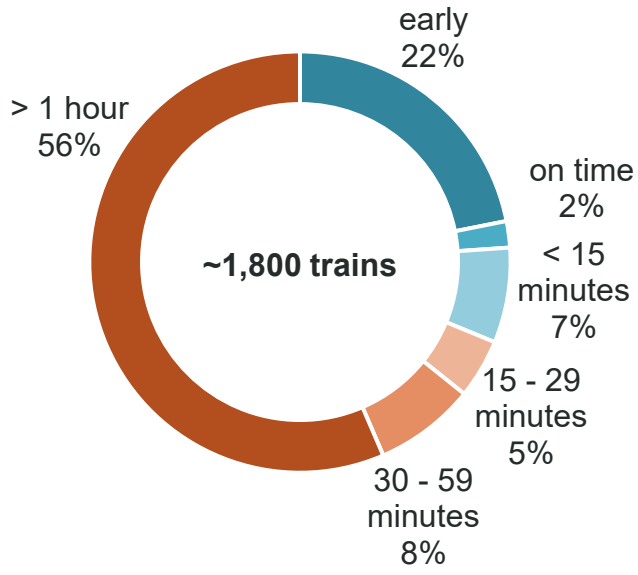
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Punctuality continues to deteriorate across Europe

Punctuality of <u>all freight trains</u> by country in 2024
(trains with < 15 min delay as % of all trains)



Delayed <u>CT trains</u> by time group
(% of CT trains[1])



- **Punctuality continues to deteriorate across Europe.** Between 2022 and 2024, only two countries achieved significant improvements: In Poland, punctuality rates increased from 44% to 52% and in Portugal from 71% to 83%.
- **Differences in timetable discipline influence punctuality**: Germany, with a punctuality rate of 55%, has a very lenient approach regarding departure delays, allowing a train path to remain reserved for up to 20 hours. France (76%) and the United Kingdom (91%), on the other hand, have tighter regimes regarding departures.
- The high number of delayed trains is also illustrated by the RNE sample data for one week in September 2025. Fewer than one in three trains arrived with a delay of less than 15 minutes. At the same time, **56% of all CT trains in the sample week were delayed by more than 60 minutes.** Only 2% of all trains were on time.

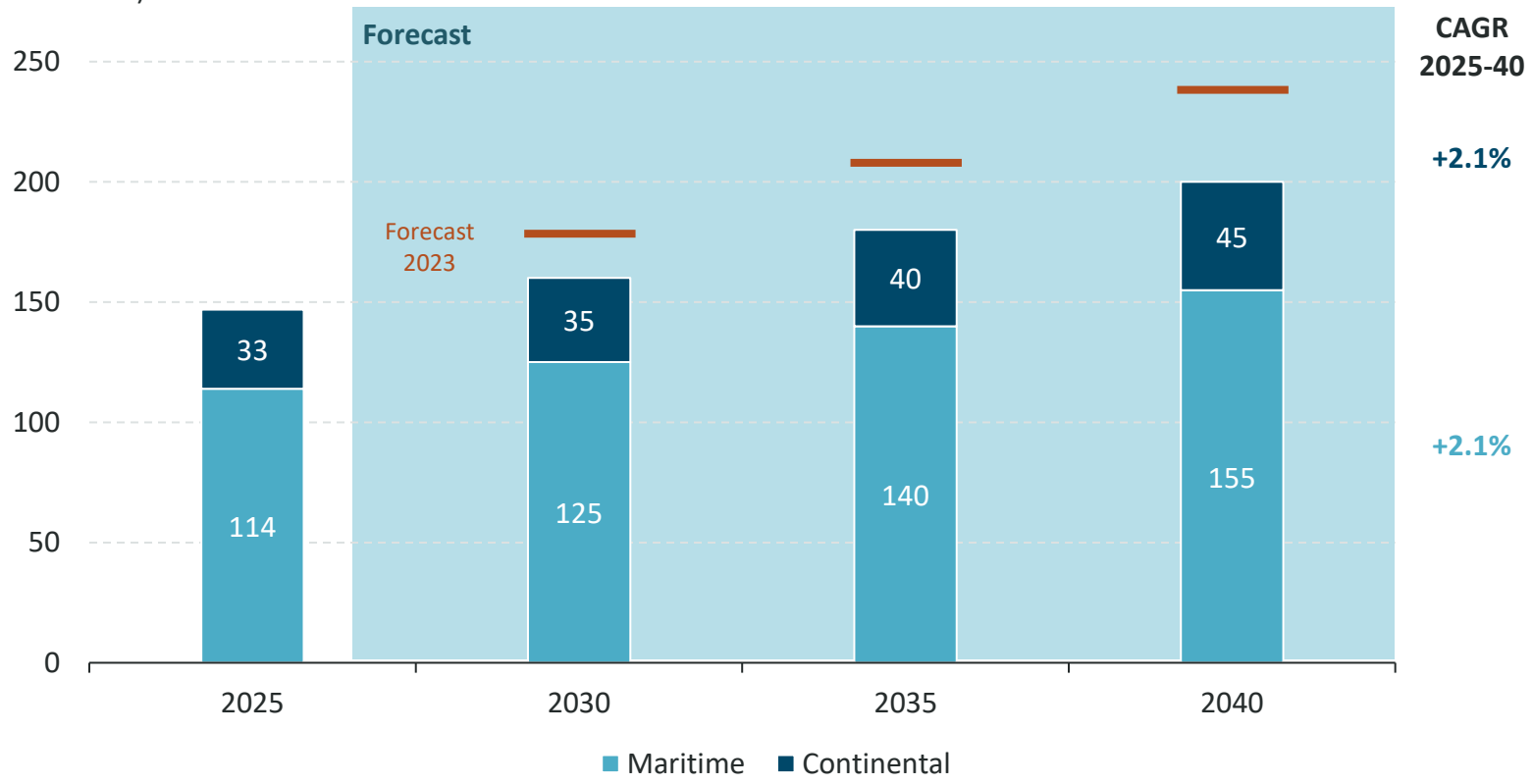
Sources: IRG-rail 14th Annual Market Monitoring Report 2026 and train information data provided by RNE

1) CT connections operating in Europe 12-20/9/2025. Due to methodological reasons, the data presented only represents a subsample of all CT connections in Europe in the sample week and may exclude existing connections. See also page 111.

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The market for Combined Transport by rail is expected to grow by over 2% p.a. until 2040

Development of unaccompanied CT rail transport performance by transportation type
(billion tkm)



- SCI Verkehr compiles a Rail Freight Market Forecast based on the IMF Economic Outlook. As the expected rebound of economic activity in Europe is further postponed, **the outlook for Combined Transport is less positive compared to 2023**, when a growth of 3% p.a. was expected until 2040.
- While the belated recovery leads to roughly 15% less CT transport performance in 2040, unaccompanied CT remains on a growth trajectory: **In 2040, the market will be around 35% larger than in 2025.**
- With a compound annual growth rate of 2.1% between 2025 and 2040, **continental CT will grow in lockstep with the overall CT market**. This development will be mainly driven by the currently planned and further expected expansion of the continental network, especially in markets like Spain, France and Poland. In 2040, continental transport's share of the Combined Transport market will be around one percentage point higher than in 2025.

Source: SCI Verkehr Rail Freight Market Forecast based on IMF Economic Outlook

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30+ policy and regulation packages will shape the future of Combined Transport on the European level

	Revision upcoming	Proposed drafts in legislative process	Implementation phase
Core policies for sector	Train Drivers Directive (2007/59/EC) SERA Directive (2012/34/EU) Standards: UIC IRS 50596 series	Combined Transport Directive (92/106/EEC)	Freight Wagons TSI (WAG TSI, 2013/321) TEN-T Regulation (2024/1679) Track Access Charging Guidelines (C/2025/2606) State-aid guidelines (LMTG & TBER, 2026/562) Rail Capacity Regulation (2026/1184)
High impact on sector	Eurovignette Directive (1999/62/EC) Dangerous Goods Directive (2008/68/EC) ERA Regulation (2016/796) European DAC Delivery Programme	Weights and Dimensions Directive (96/53/EC) Connecting Europe Facility 2028-2034 EU Ports Strategy	ETS2 Regulation (2023/959) CCS TSI (CCS TSI, 2023/1695) Waste Shipment Regulation (2024/1157) HDV Emission Standards Regulation (2024/1610) Telematics TSI (TEL TSI, 2026/253) ERTMS Deployment Plan
Relevance for certain aspects	Approval of Motor Vehicles Regulation (2018/858) Quality Jobs Roadmap	Military Mobility Package	eFTI Regulation (2020/1056) Data Governance Act (2022/868) Data Act (2023/2854) AI Act (2024/1689) CountEmissionsEU Regulation (2026/1030) Common European Mobility Data Space ERA Joint Network Secretariat procedures External Costs Handbook

Source: European Commission

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26%
Overall growth of Combined Transport between 2014 and 2024

34%
Combined Transport share of the total European rail freight sector in 2025

29%
Growth of continental Combined Transport performance between 2015 and 2025

59%
Share of cross-border connections for unaccompanied Combined Transport in 2025

37%
Growth of intermodal wagon fleet between 2015 and 2025

4.1%
Growth of Combined Transport rail freight performance between 2019 and 2025

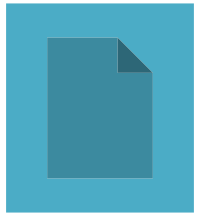
11%
Growth of number of Combined Transport terminals in Europe between 2015 and 2025

340+
Combined Transport connections with at least weekly departures in 2025

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Innovation as a response to Challenges and Opportunities in Multimodal Transport: The B-TC – BASF Class Tankcontainer

Samer Ghondour
BASF
Business Development Lead – Railway Undertaking & Intermodal Strategy



Concluding remarks

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