INTERNATIONAL UNION OF RAILWAYS

UIRR INTERNATIONAL UNION FOR ROAD-RAIL COMBINED TRANSPORT

2026 Report on Combined Transport in Europe



Foreword – UIC



François Davenne
UIC Director General

The findings of this report confirm the essential role of Combined Transport as a driving force for European rail freight. While conventional rail freight faces structural challenges, Combined Transport has demonstrated its resilience, increasing its share of total rail freight from 23% in 2019 to 34% in 2025. This highlights its growing importance for competitive, efficient and sustainable logistics.

Combined Transport is also a key driver of international freight corridor development. By connecting railway networks, terminals and logistics services, it provides the foundation for integrated transport chains. The emergence of very long-distance, intercontinental corridors opens new opportunities for rail within global supply chains.

Realising this potential requires more than infrastructure investment. Seamless cross-border operations depend on technical and digital interoperability, harmonised legal frameworks and effective governance. As the worldwide railway organisation, UIC acts as an enabler, providing expertise, standards and cooperation frameworks to support international corridor development.

Innovation is equally essential. Electrification of transport creates opportunities for multimodal integration. Through initiatives such as the European ZEFES project, UIC anticipates developments in zero-emission trucks and electric trailers, promoting compatibility with rail and exploring solutions such as onboard charging and energy-equipped terminals.

Our conviction is clear: innovation must connect transport modes, not create new barriers between them. Through standardisation, technical expertise and international cooperation, UIC will continue to strengthen Combined Transport and support seamless freight corridors, contributing to a more competitive, resilient and sustainable transport system in Europe and beyond.

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Foreword – UIRR



Ralf-Charley Schultze
UIRR Director General

Combined Transport is an essential driver of Europe's sustainable, competitive and resilient freight transport system. By combining the flexibility of road transport with the efficiency of rail – and where relevant, inland waterways and maritime transport – it offers tangible advantages in supporting the policy objectives of the European Union's Clean Industrial Deal. Like this, industries can better manage their logistics costs and maintain their competitive position in global markets.

However, achieving these ambitions also requires greater standardisation and harmonisation across the sector. Common approaches to operational processes, data exchange, and digitalisation are fundamental to improving interoperability, transparency and efficiency throughout the transport chain. Similarly, harmonised statistical methodologies and reliable, comparable data are essential for measuring the performance of Combined Transport, demonstrating its contribution to EU policy objectives, and supporting evidence-based decision-making.

UIC and UIRR share the conviction that closer cooperation, common standards and a clear understanding of the sector's contribution are indispensable conditions to unlock the full potential of Combined Transport. By working together, the rail and intermodal communities can strengthen the integration of transport modes, accelerate digital transformation and contribute to building a more sustainable and resilient European freight transport system.

This report represents a concrete step towards this shared ambition and underscores the continued development of Combined Transport as an essential pillar of European logistics.

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Executive summary

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

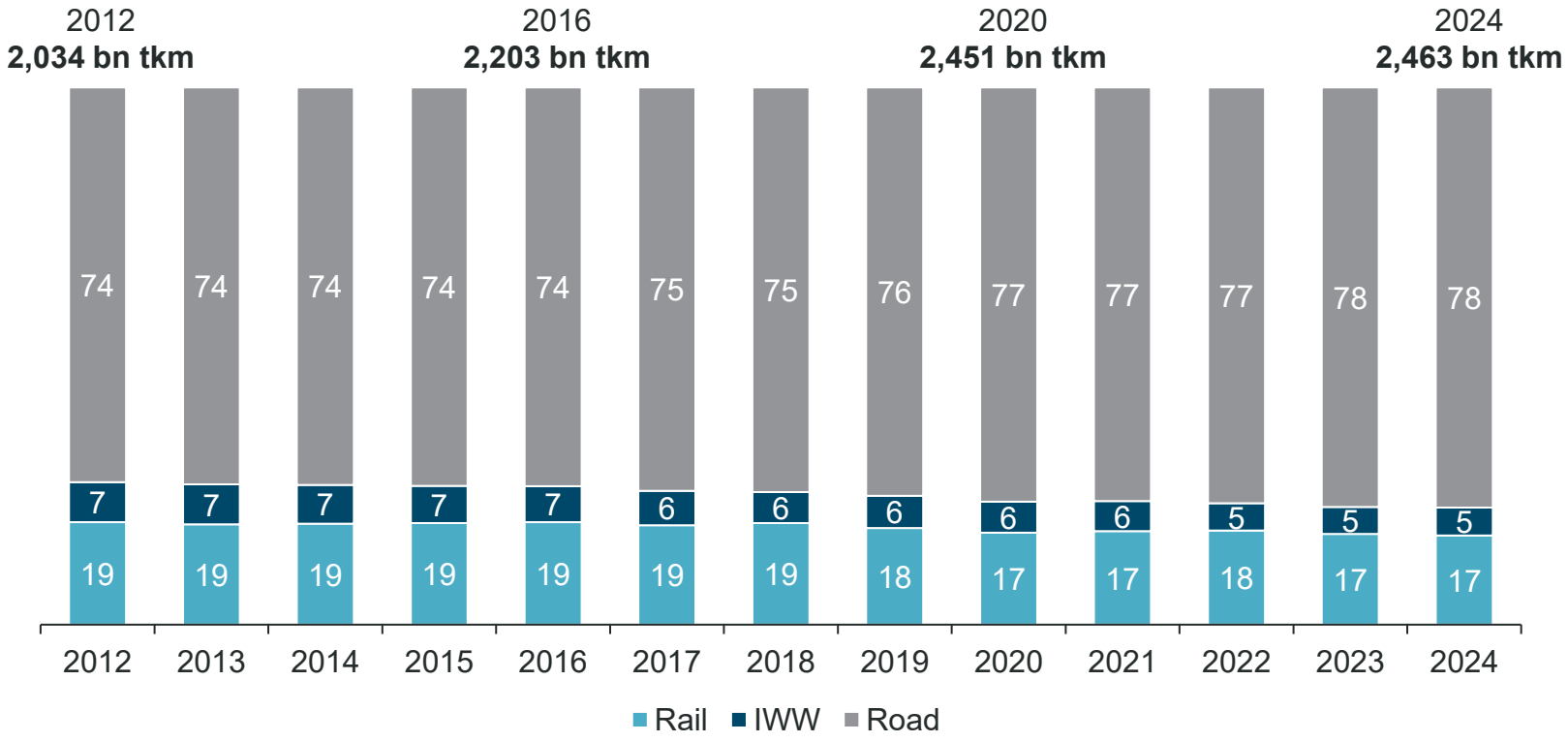
4.1%
Growth of Combined Transport rail freight performance between 2019 and 2025

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

The modal share of rail freight has stabilised thanks to Combined Transport but further action is required 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 waterways.
- After a slight decline from 2013 to 2020, **the share of rail freight in the European transport market has since stabilised, thanks to the development of Combined Transport.** However, at 17%, only half of the 2030 target had been reached by 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%.

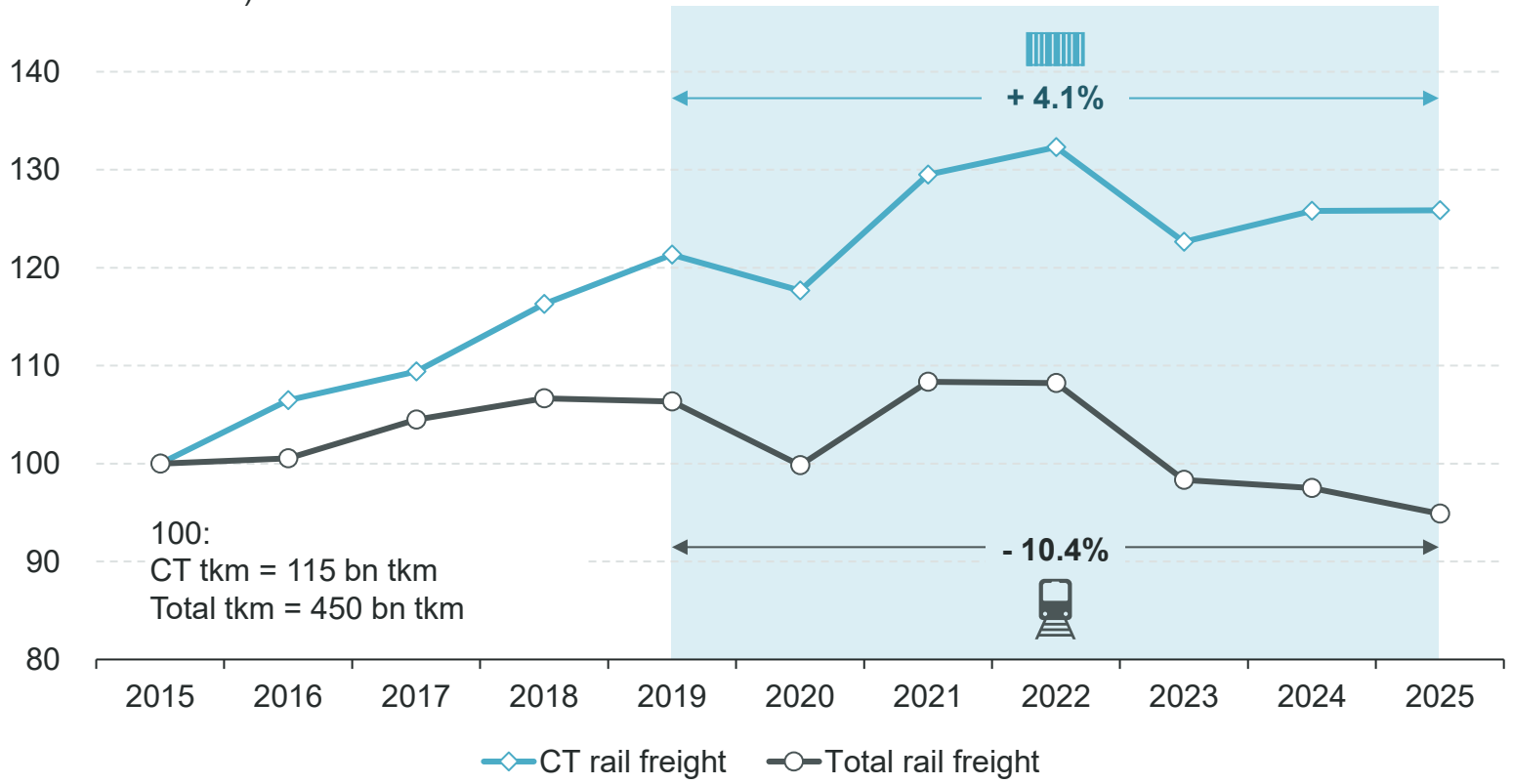
Source: Eurostat tran_hv_frmod (share); road_tert_go (road), rail_go_total (rail), iww_go_atyve (iww) as of 23/7/2026

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)



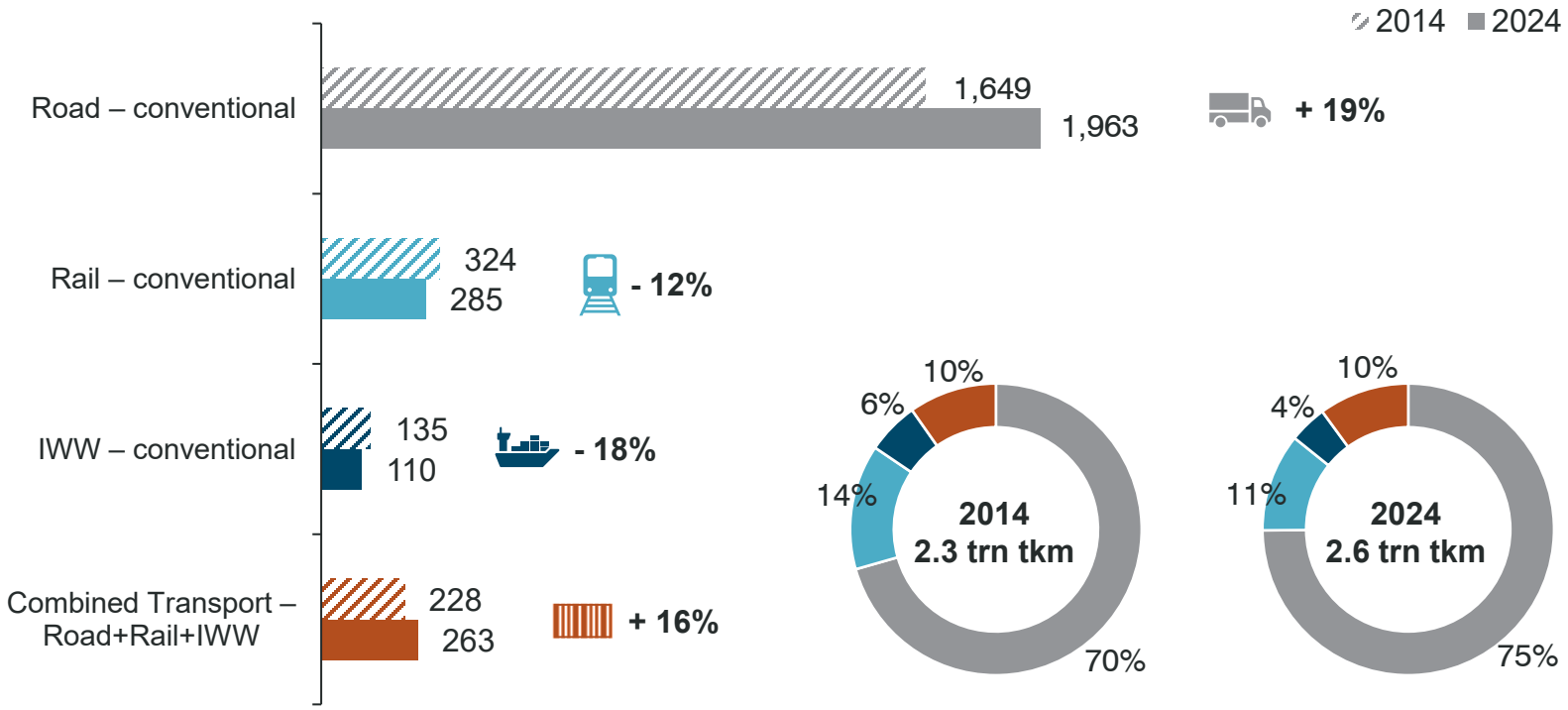
Source: Eurostat rail_go_grpgood as of 28/7/2026; SCI Multiclient Study "The European Intermodal Rail Freight Market 2026"

- 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 significantly 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)



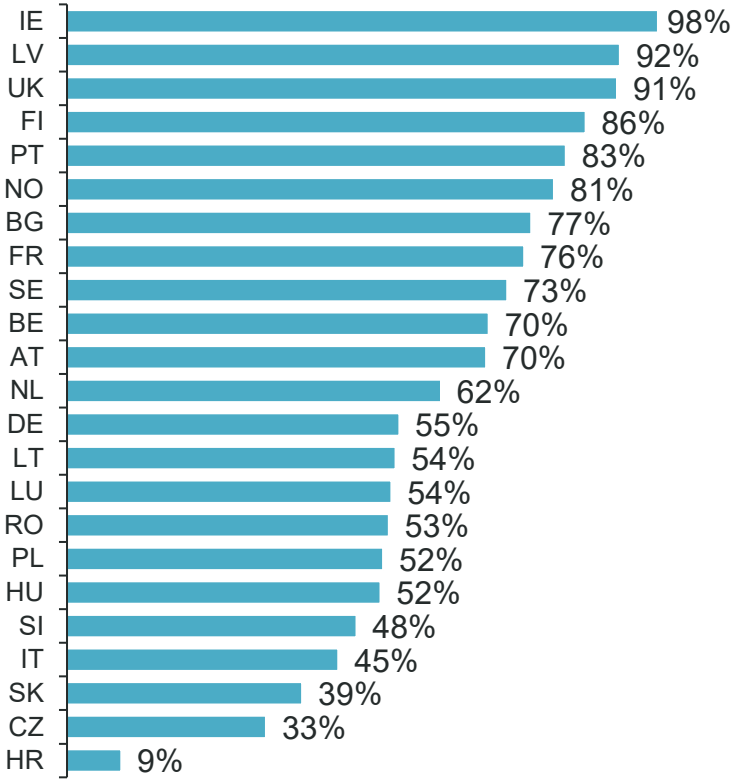
- Despite a challenging market environment, **Combined Transport defended its market share of 10% of the European transport market** against road transport, which grew by almost 20% between 2014 and 2024 and gained 5 percentage points of market share.
- **Without this growth for the CT segment, the non-road 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, such as 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”

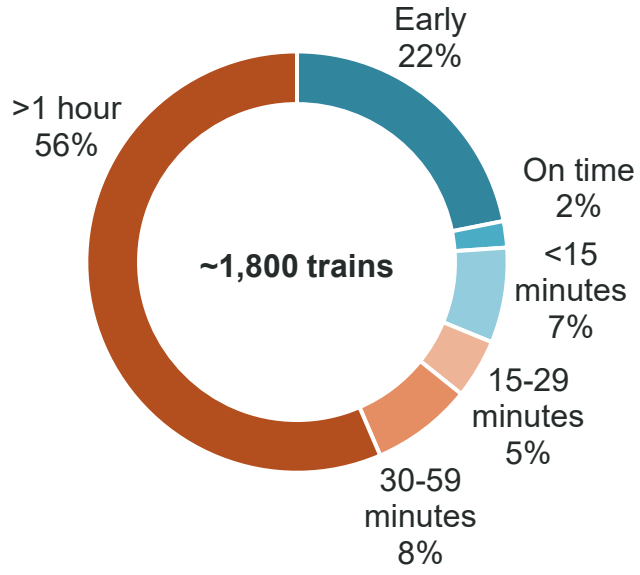
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Punctuality continues to deteriorate across Europe

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



Delayed CT trains 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.

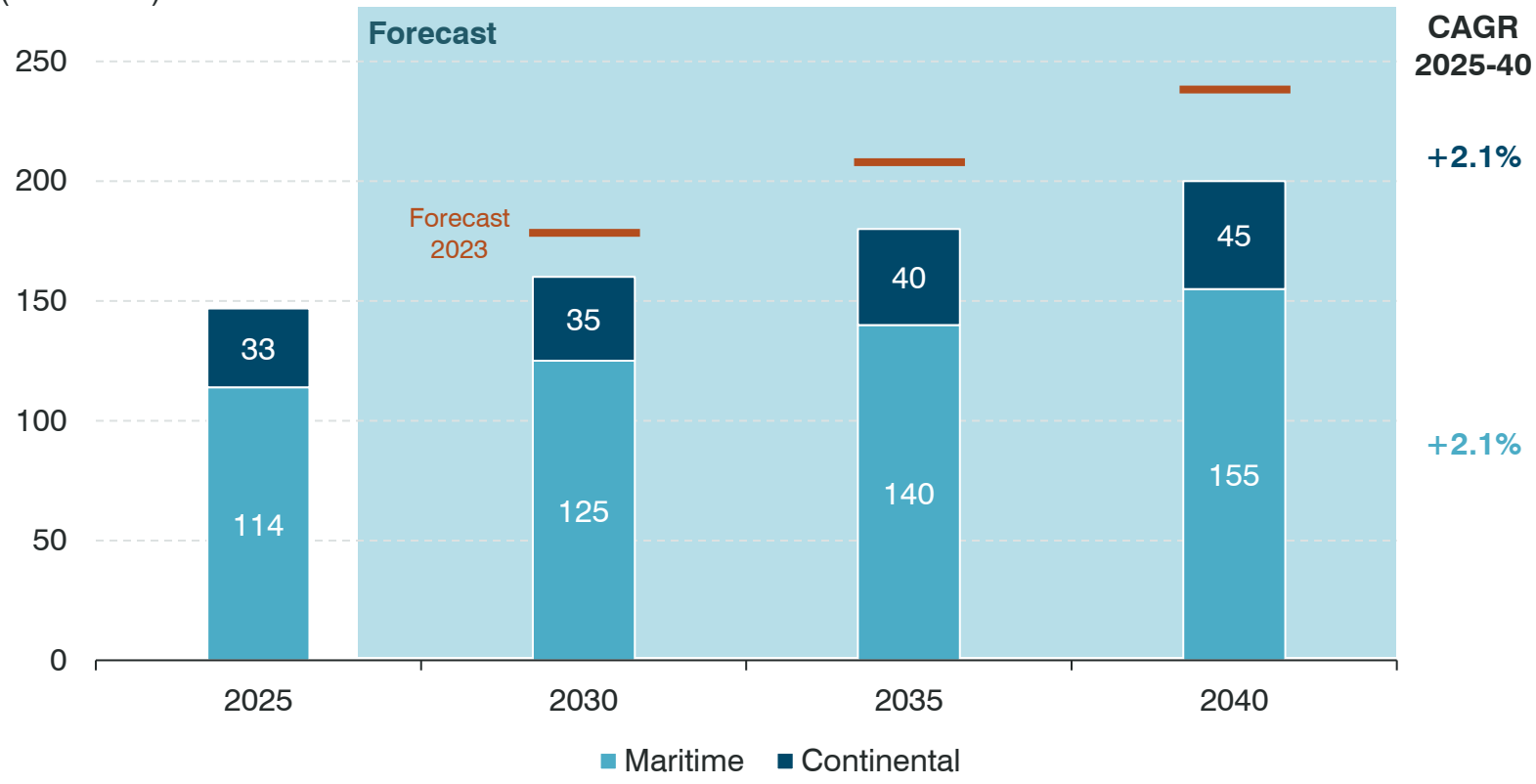
Sources: IRG-rail 14th Annual Market Monitoring Report 2026 and train information data provided by RNE

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)



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

- 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 than in 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.

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30+ policy and regulation packages will shape the future of Combined Transport at 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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European Combined Transport market

Facts and figures

Within Europe, Combined Transport refers to a specific form of intermodal freight transport and can be divided into different market segments

Definition of Combined Transport according to Council Directive 92/106/EEC of 7 December 1992 on the establishment of common rules for certain types of combined transport of goods between Member States:

"For the purposes of this Directive, 'combined transport' means **the transport of goods between Member States where the lorry, trailer, semi-trailer, with or without tractor unit, swap body or container of 20 feet or more uses the road on the initial or final leg of the journey and, on the other leg, rail or inland waterway or maritime services where this section exceeds 100 km as the crow flies** and make the initial or final road transport leg of the journey;
- between the point where the goods are loaded and the nearest suitable rail loading station for the initial leg, and between the nearest suitable rail unloading station and the point where the goods are unloaded for the final leg, or;
- within a radius not exceeding 150 km as the crow flies from the inland waterway port or seaport of loading or unloading."

Note: For this report, 'Combined Transport' and 'Intermodal (rail) (freight) Transport' have the same meaning and are therefore interchangeable.

Segmentation of Combined Transport services

	Unaccompanied Combined Transport *Transhipment of the loading unit independently from road vehicle and driver*	**Accompanied Combined Transport** *Transhipment of the loading unit together with road vehicle and driver (RoLa)*
Maritime Combined Transport *Transport of ISO containers, usually as part of intercontinental transport chains*	✓	✗
Continental Combined Transport *Transport of swap bodies, semi-trailers and lorries, usually as part of intra-European transport chains*	✓	✓

*All segments can be further differentiated into **cross-border** and **domestic** services. For this report, all rail and IWW legs with the same origin and destination country are considered domestic services, regardless of origin or destination of the first and last leg on road.*

Source: Council Directive 92/106/EEC of 7 December 1992 on the establishment of common rules for certain types of combined transport of goods between Member States

Main data sources used for the compilation of this report

- **Eurostat** is the statistical office of the European Union and a Directorate-General of the European Commission, responsible for producing and publishing harmonised, comparable European statistics based largely on data supplied by national statistical authorities.
- The Eurostat database is the main source for this report and assures compatibility with official EU statistics and long-term comparability with former editions of this report.

- **RailNetEurope (RNE)** is an association of European rail infrastructure managers and allocation bodies that coordinates international processes for capacity management, traffic management, performance, IT and related cross-border rail activities.
- RNE provided the compilers with an excerpt of train information data for 2025 from its Train Information System (TIS). This enabled the analysis of real-world operational data from Combined Transport trains regarding travel distances, travel times and delays.

- **CESAR-NEXT** is a sector-operated information platform for Combined Transport that provides customers and operators with current status information on trains, wagons and intermodal loading units; it is operated by CESAR Information Services in Brussels and supported within the UIRR environment.
- CESAR provided the compilers with an excerpt of train information for 2025 from its Tracking and Tracing tool. This enabled an analysis of real-world operational data from Combined Transport trains focusing on connections and frequencies of service.

Besides these main sources, other sources such as the UIRR yearly statistics were also used for specific topics or to close data gaps.
Please refer to page 107 for a discussion of existing data gaps and to page 113 for a full overview of all data sources used.

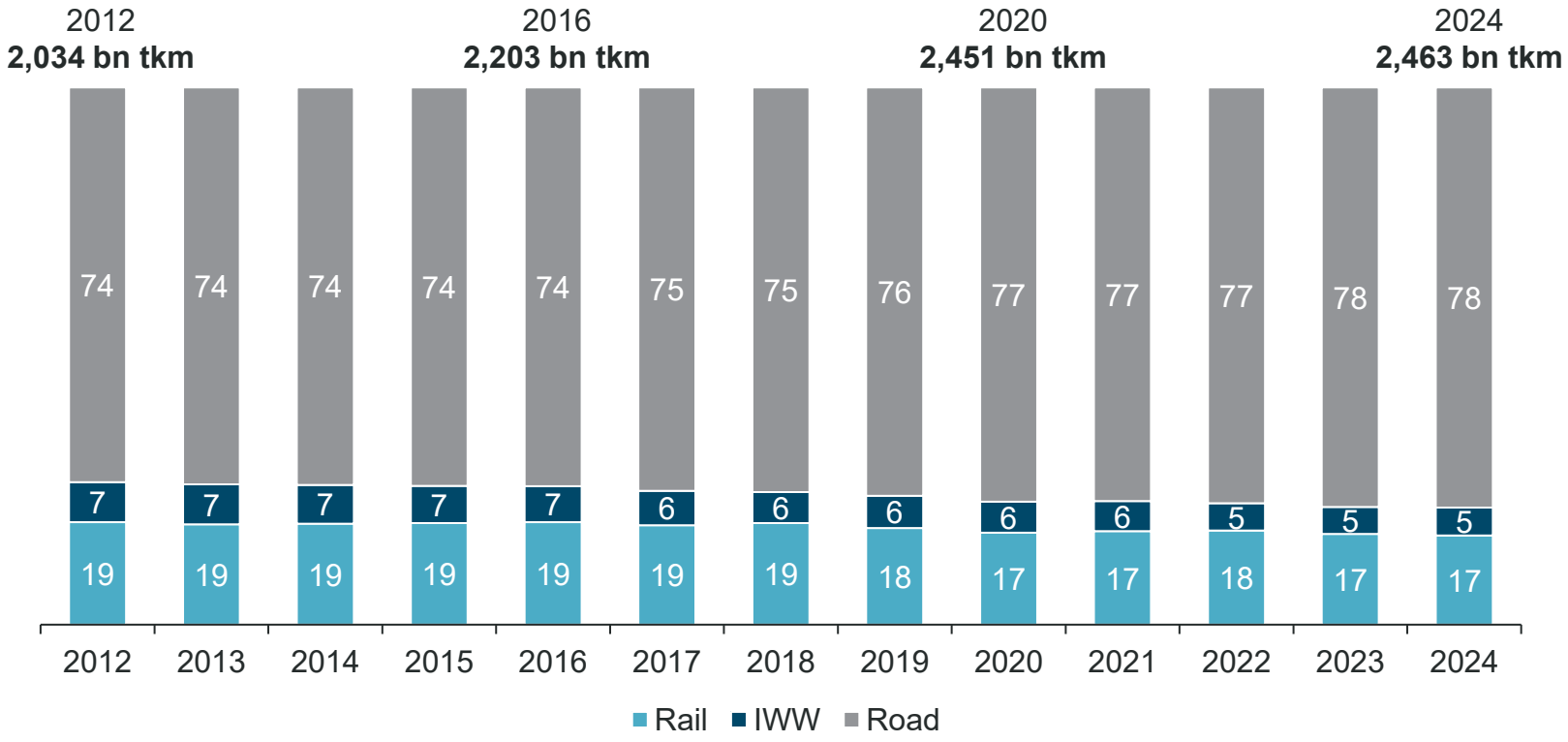
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The European freight transport market

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



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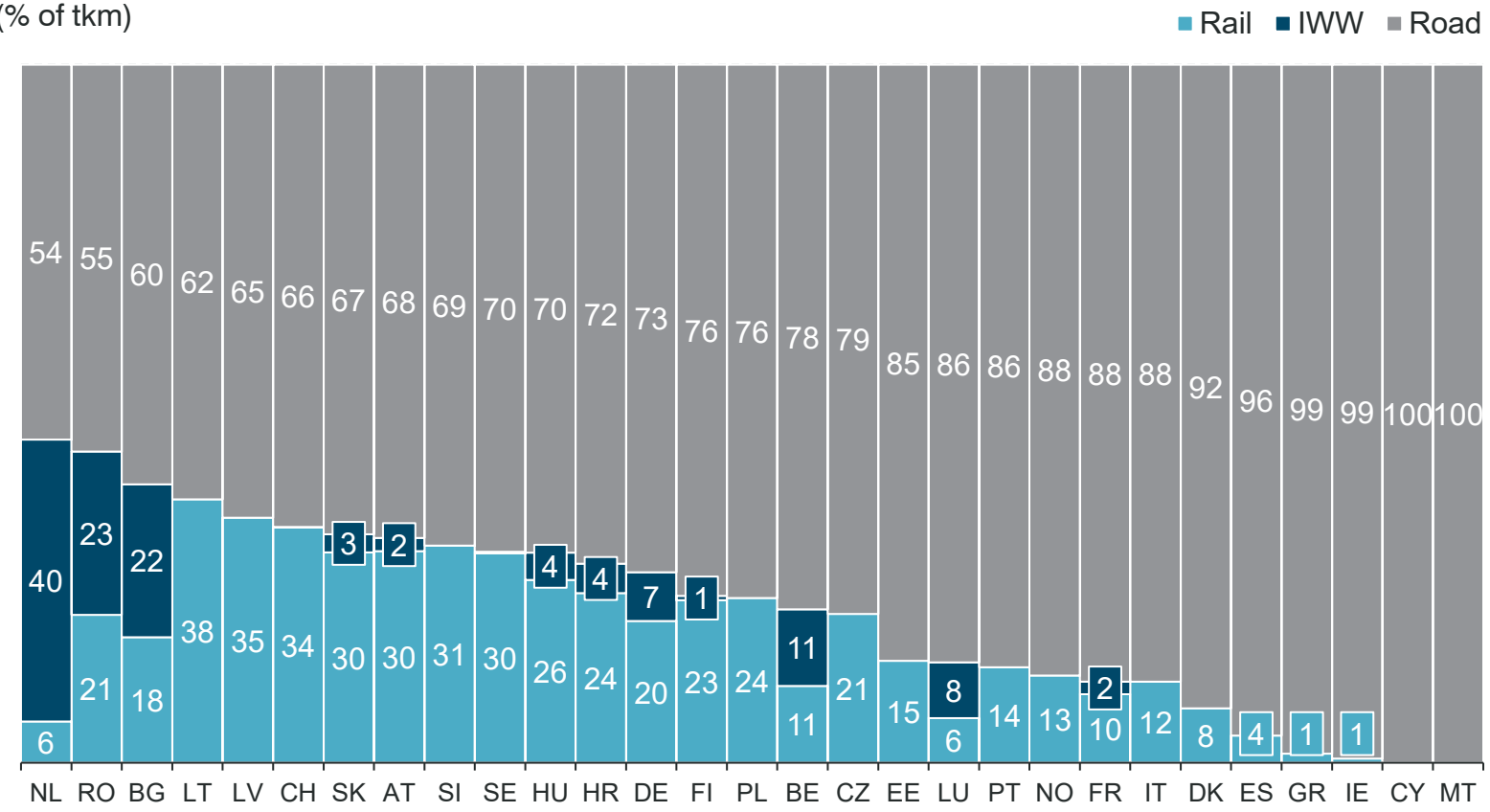
Source: Eurostat tran_hv_frmod (share); road_tert_go (road), rail_go_total (rail), iww_go_atyve (iww) as of 23/7/2026

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

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Six Member States and Switzerland have already reached the 30% modal share target for rail freight

Modal split in 2024 by country
(% of tkm)



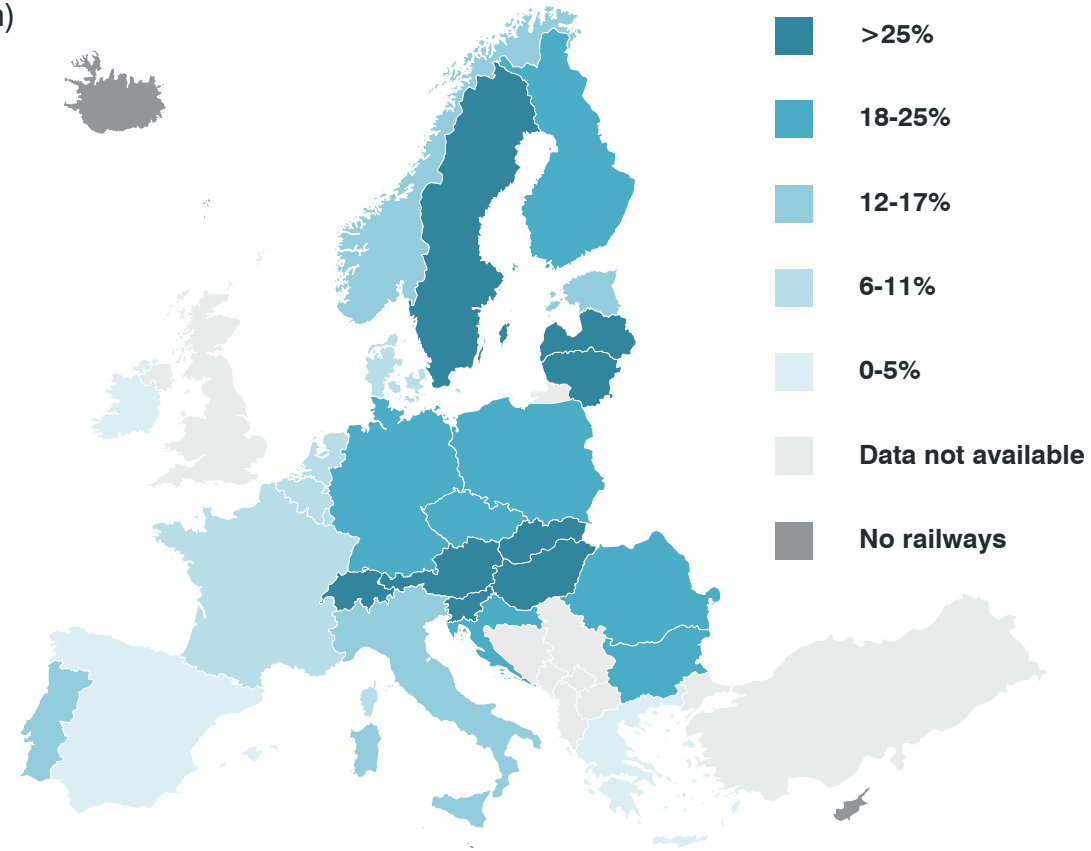
Source: Eurostat tran_hv_frmod as of 23/7/2026

- **Lithuania (38%) and Latvia (35%) have the highest rail modal shares, while Switzerland (34%) ranks third.** The two Baltic countries have recorded declines since 2013, partly due to sanctions against Russia following its invasion of Ukraine. Swiss rail freight is dominated by transalpine transit. Its rail share declined steadily from 2013 to 2022, constrained by limited feeder-line capacity in Germany and Italy, before stabilising at around 34% between 2022 and 2024.
- Only six countries had IWW modal shares over 5%, with the Netherlands reporting by far the biggest share with 40%, followed by Romania (23%) and Bulgaria (22%). **None of the six top IWW countries was among the top 10 countries by rail share.**
- **Since 2012, the modal share of IWW declined in all Member States except Finland.** On the one hand, bulk transport of coal and ores declined. On the other, increasingly unreliable water levels, especially on the Rhine river, had a negative impact on IWW transport.

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The modal share of rail freight transport is still highest in Northern and Central Eastern Europe

Map of rail modal split of freight transport in Europe by country in 2024
(% of total inland freight tkm)



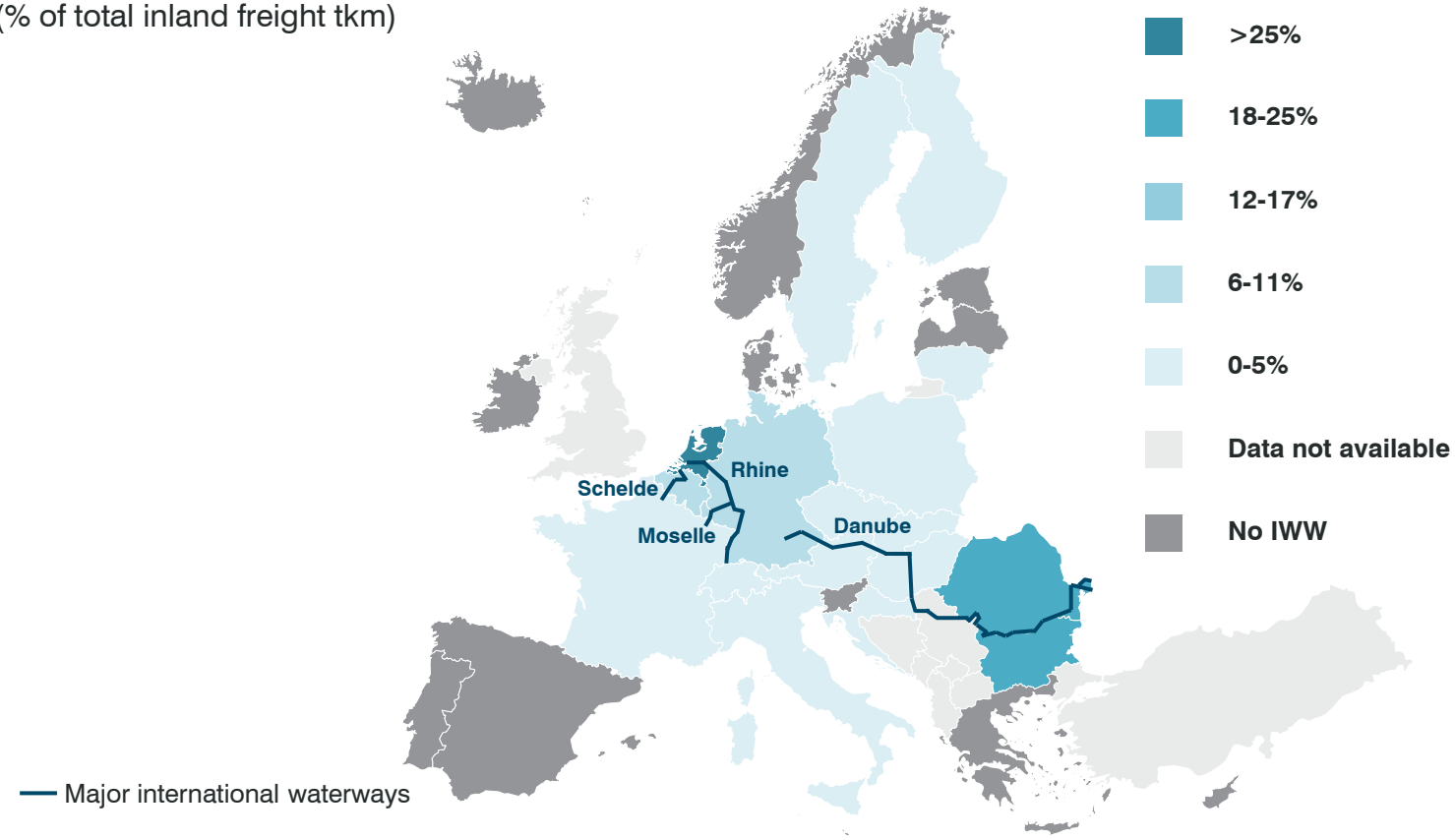
- **The modal share of rail freight is generally higher in Northern and Eastern Europe** compared to Western and Southern Europe.
- The Baltic states (Estonia, Latvia and Lithuania) in particular have historically had a high share of rail freight transport due to transit connections with Russia. As a result, **the Baltics were hit especially hard after the Russian invasion of Ukraine in 2022 with declines from 40% in 2021 to 15% in 2024 (Estonia), 53% to 35% (Latvia) and 63% to 38% (Lithuania).** Similarly, Finland saw a decrease in cross-border rail transport with Russia from 27% to 24%.
- The **EU Member States with the lowest shares for rail freight transport** (Spain, Greece and Ireland) have relatively **low-density networks of single-track railway lines**, usually combined with a low industrial base and a well-developed road freight sector. This impedes the development of a competitive rail freight sector.

Source: SCI Verkehr based on Eurostat tran_hv_frmod as of 28/07/2026

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The Netherlands has the highest modal share for inland waterway navigation with 40%

Map of IWW modal split of freight transport in Europe by country in 2024
(% of total inland freight tkm)



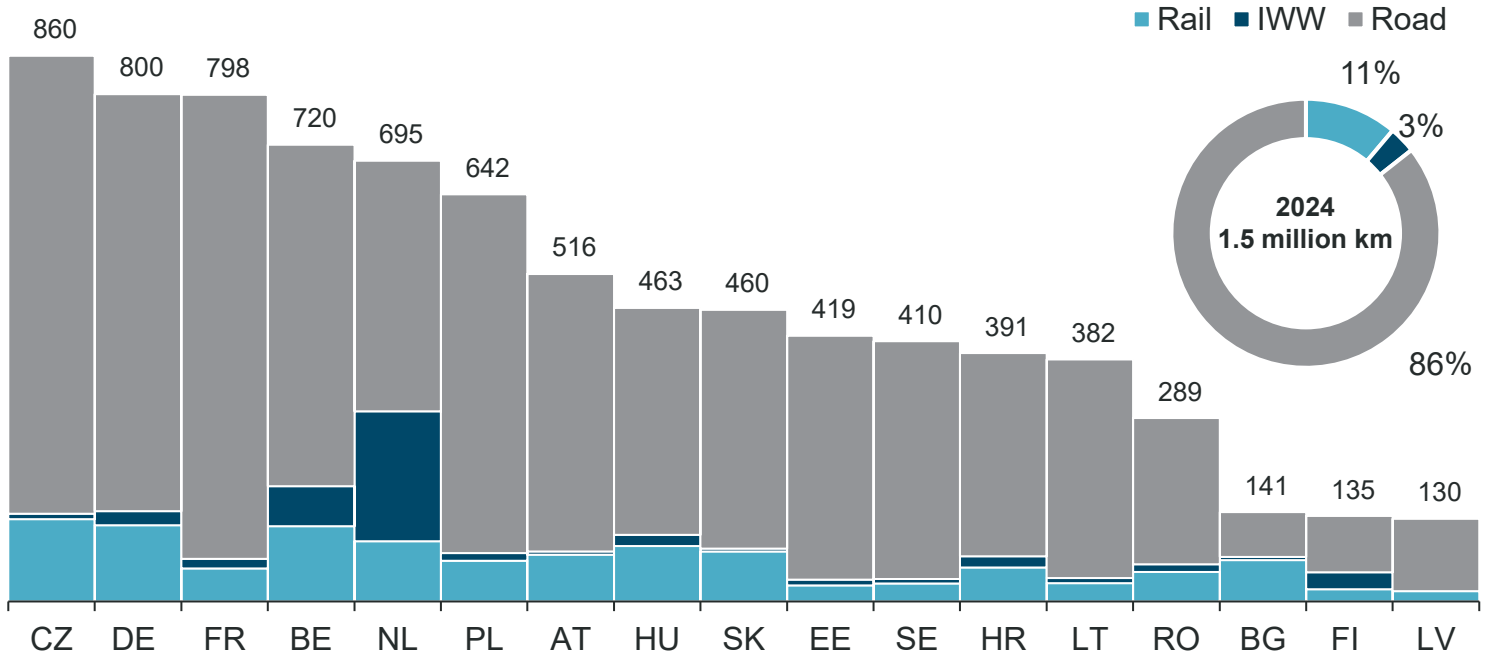
Source: SCI Verkehr based on Eurostat tran_hv_frmod as of 28/07/2026

- In general, the modal share of IWW is very low all over Europe. **IWW is mostly concentrated on the Rhine river and its tributaries as well as on the lower Danube.**
- **Four countries have IWW modal shares above 10%**: The Netherlands (40%), Romania (23%), Bulgaria (22%) and Belgium (11%). All four countries use big natural waterways (Rhine, Danube and Schelde) as the backbone of their IWW systems.
- Due to the necessary fluvial and canal systems, **IWW infrastructure is far less common than rail infrastructure in Europe**, contributing to its overall smaller modal share. While only two EU Member States have no rail systems (Malta and Cyprus), ten have no IWW infrastructure in use.
- For **Belgium**, the institutional context is relevant as well. IWW is regionalised, which has provided access to important financial resources for upgrading the entire fluvial system (almost all bridges were heightened) and which the federal rail sector is lacking.

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Rail infrastructure in Europe has higher performance per network km compared to the road network

Network density and share by transport mode in 2024
(network km per 1,000 km² of land area; % of km)



	CZ	DE	FR	BE	NL	PL	AT	HU	SK	EE	SE	HR	LT	RO	BG	FI	LV
Road	84%	82%	92%	75%	57%	88%	85%	77%	82%	92%	91%	82%	90%	80%	59%	66%	88%
IWW	1%	3%	2%	9%	29%	2%	1%	4%	1%	2%	2%	5%	2%	4%	3%	20%	-
Rail	15%	15%	6%	17%	14%	10%	14%	19%	17%	6%	7%	14%	8%	16%	46%	14%	12%

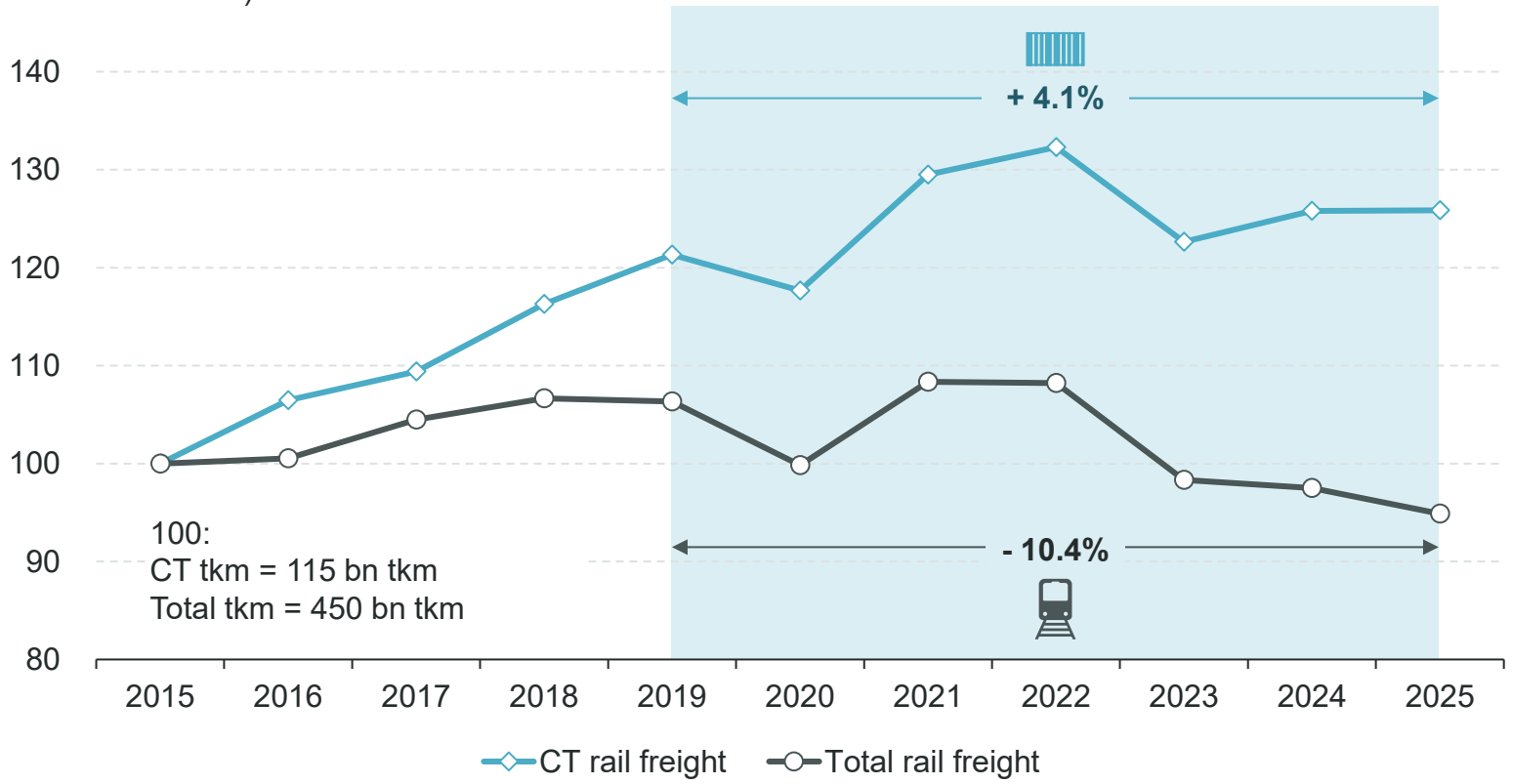
Source: Eurostat iww_if_infrastr as of 5/8/2024; SCI Verkehr Database; UIRR country fact sheets

- The European rail network has a length of over 245,000 km. **Germany alone accounts for roughly a fifth of the total network with 47,000 km.** This is the largest national infrastructure in Europe, followed by France with 31,000 km (13%).
- While the absolute network length tends to be correlated with the overall size of countries, the **network density is highest in the Czech Republic** with 860 km of transport infrastructure per 1,000 km² of land area, followed by Germany with 800 km. This reflects the role of both countries as European transit and logistics hubs.
- Bulgaria has the highest share of rail infrastructure with 46%, followed by Hungary with 19% and Slovakia with 17%. For the countries considered, 11% of all transport infrastructure is rail infrastructure. This is below the current modal share of rail freight transport, resulting in a **higher performance per network km for rail compared to road**.

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



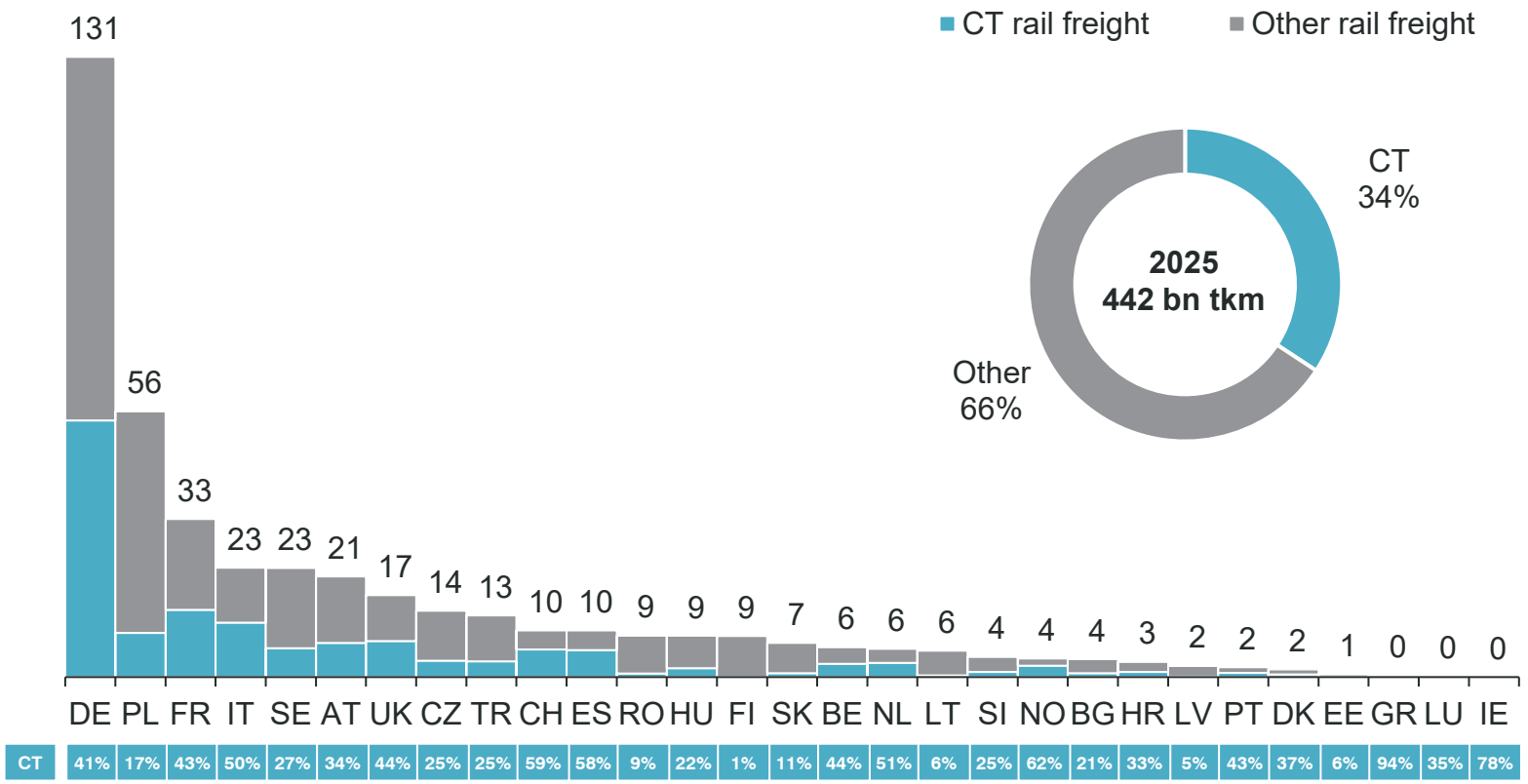
Source: Eurostat rail_go_grpgood as of 28/7/2026; SCI Multiclient Study "The European Intermodal Rail Freight Market 2026"

- 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 significantly 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 accounts for at least one in three tonne-kilometres of rail freight transport

Rail CT and other freight transport performance in 2025 by country
(billion tkm)



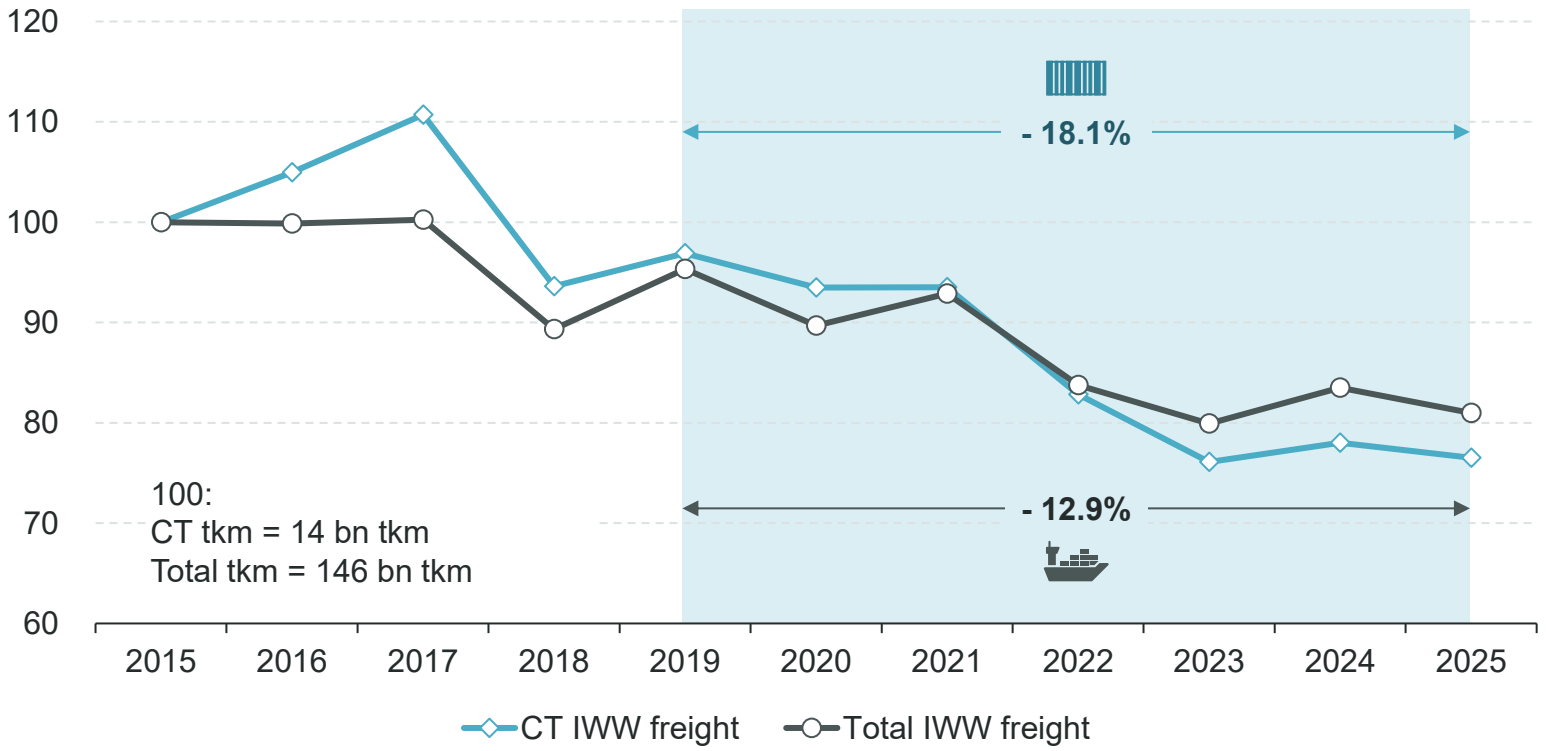
Source: Eurostat rail_go_grpgood as of 28/7/2026; SCI Multiclient Study "The European Intermodal Rail Freight Market 2026"

- **Germany is by far the most significant rail freight market in Europe** in absolute terms, due to the size of the economy and its position in the centre of Europe. The second largest market, Poland, is less than half Germany's size, and the third largest market, France, is less than a quarter its size. Together, these three markets represent more than 50% of the total European market.
- According to Eurostat figures, Combined Transport accounts for at least one in three tonne-kilometres of rail freight transport. At country level, **the highest CT shares are reported in Greece (94%), Ireland (78%), Norway (62%), Switzerland (59%) and Spain (58%)**. With only a 1% market share, Finland has the smallest CT sector in Europe in relation to the rail freight market.

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Water-level related disruptions on the Rhine have accelerated the decline of inland waterway navigation

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



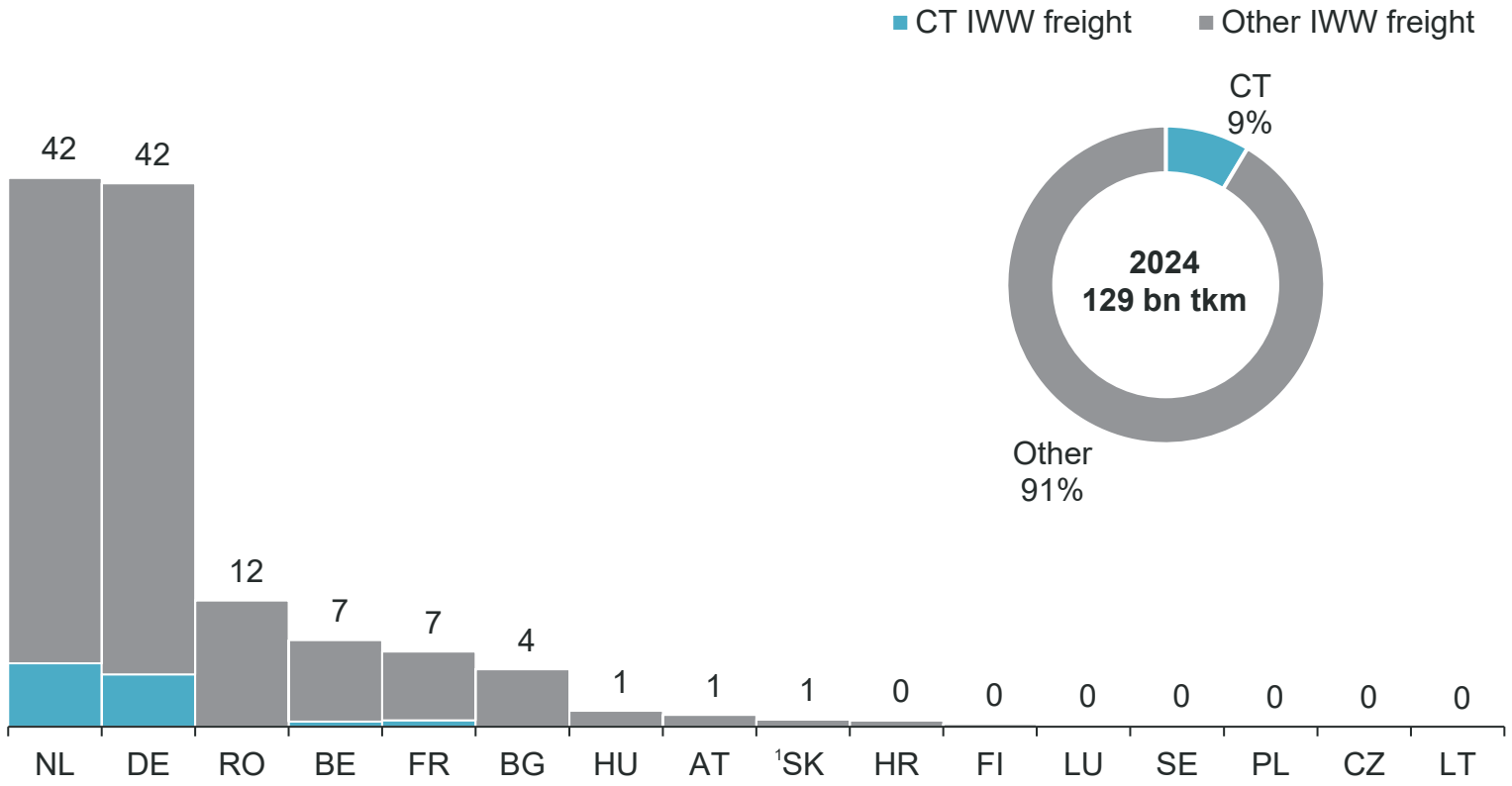
- **IWW transport performance was severely hit by the extreme low-water period on the Rhine in 2018 and has not recovered since.** In fact, IWW performance fell by another 12.9% between 2019 and 2025, partially due to decreasing coal and liquid bulk transports and water-level related disruptions. This was despite a small recovery in 2024, as volumes fell again in 2025.
- Combined Transport performance fell below the 2015 level during the massive disruptions in 2018. **With a fall of -18.1% between 2019 and 2025, CT has experienced a more unfavourable trend than the market as a whole.** This is mainly driven by big shippers with high volumes diversifying their supply chain away from IWW to be more independent from the increasing number of low-water events along the Rhine river.

Source: Eurostat iww_go_atygo as of 26/8/2026; Eurostat iww_go_actygo as of 26/8/2026

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The Rhine remains the backbone of the European inland waterway Combined Transport system

IWW CT and other freight transport performance in 2025 by country
(billion tkm)



Source: Eurostat iww_go_atygo as of 26/8/2026; Eurostat iww_go_actygo as of 26/08/2026

- **IWW is mostly restricted to a few European countries** which have access to big navigable rivers. The Rhine and its tributaries, the Scheldt/Meuse system, the Danube and the Seine form the backbone for modernised secondary canal systems.
- In absolute numbers, **the Netherlands and Germany have comparable IWW transport markets in size**. Together, both countries account for over 70% of the European IWW transport performance.
- Overall, **Combined Transport has a 9% market share of IWW transport in Europe**. It is exclusively used for unaccompanied maritime units and mostly concentrated along the Rhine, to and from the ports in Rotterdam and Antwerp.
- The only major IWW players not surrounding the Rhine are **Romania** and, to a lesser extent, **Bulgaria**. Neither of these two countries reported significant IWW Combined Transport volumes in 2024.

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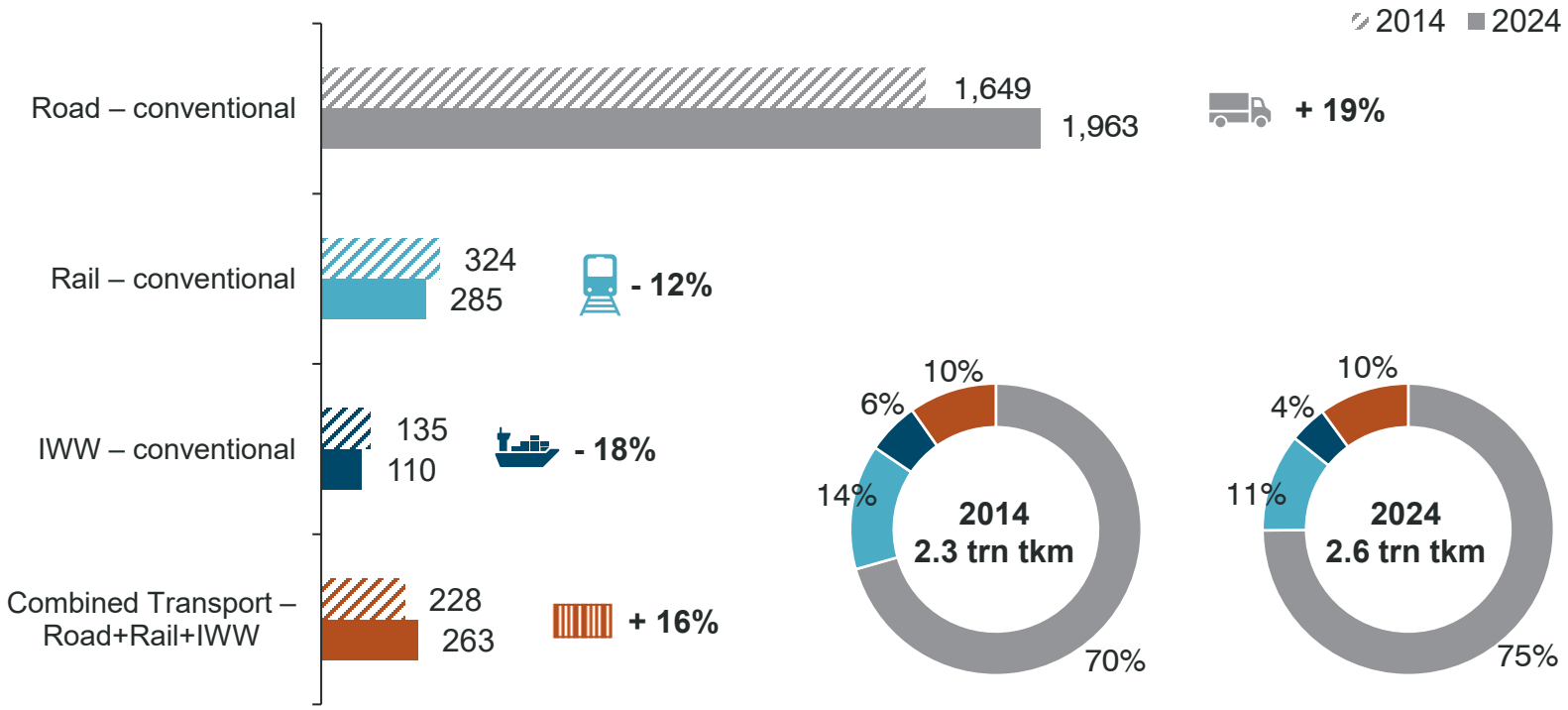
02

Combined Transport performance in the European transport system

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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)



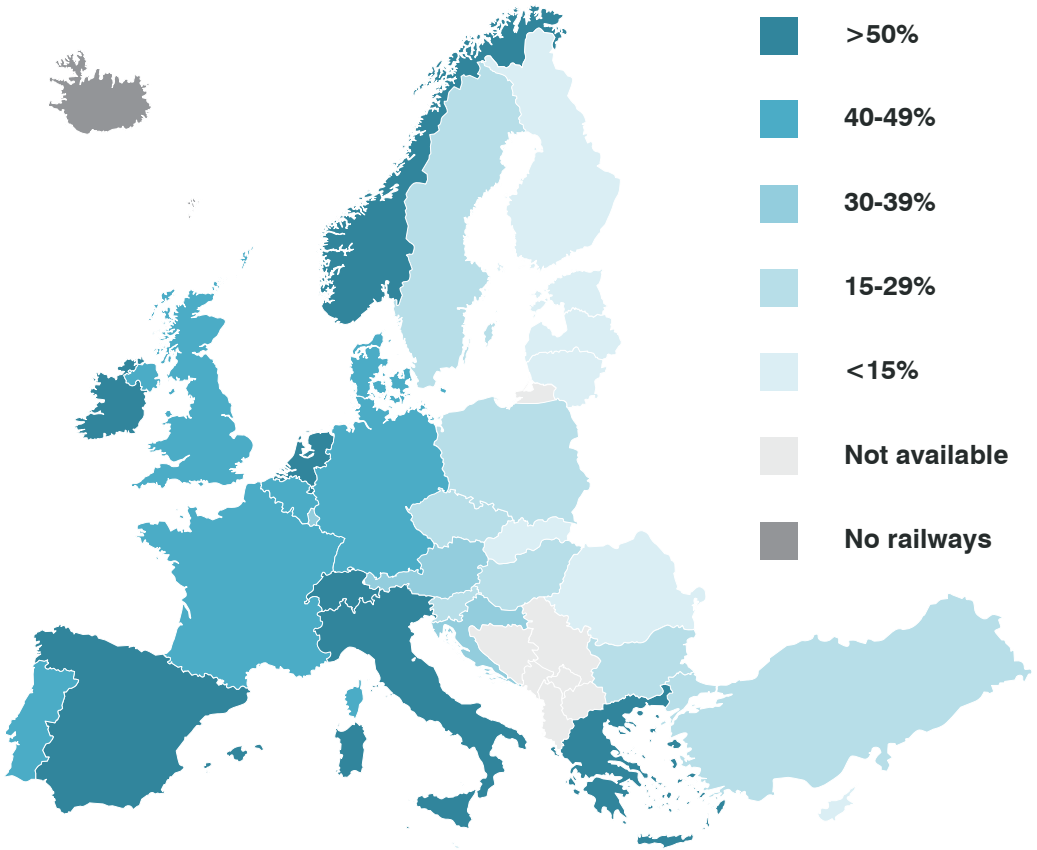
- Despite a challenging market environment, **Combined Transport defended its market share of 10% of the European transport market** against road transport, which grew by almost 20% between 2014 and 2024 and gained 5 percentage points of market share.
- **Without this growth for the CT segment, the non-road 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, such as 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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Combined Transport accounts for over half of all rail freight performance in seven European countries

Map of CT share of rail freight transport in Europe by country in 2025
(% of total inland freight tkm)



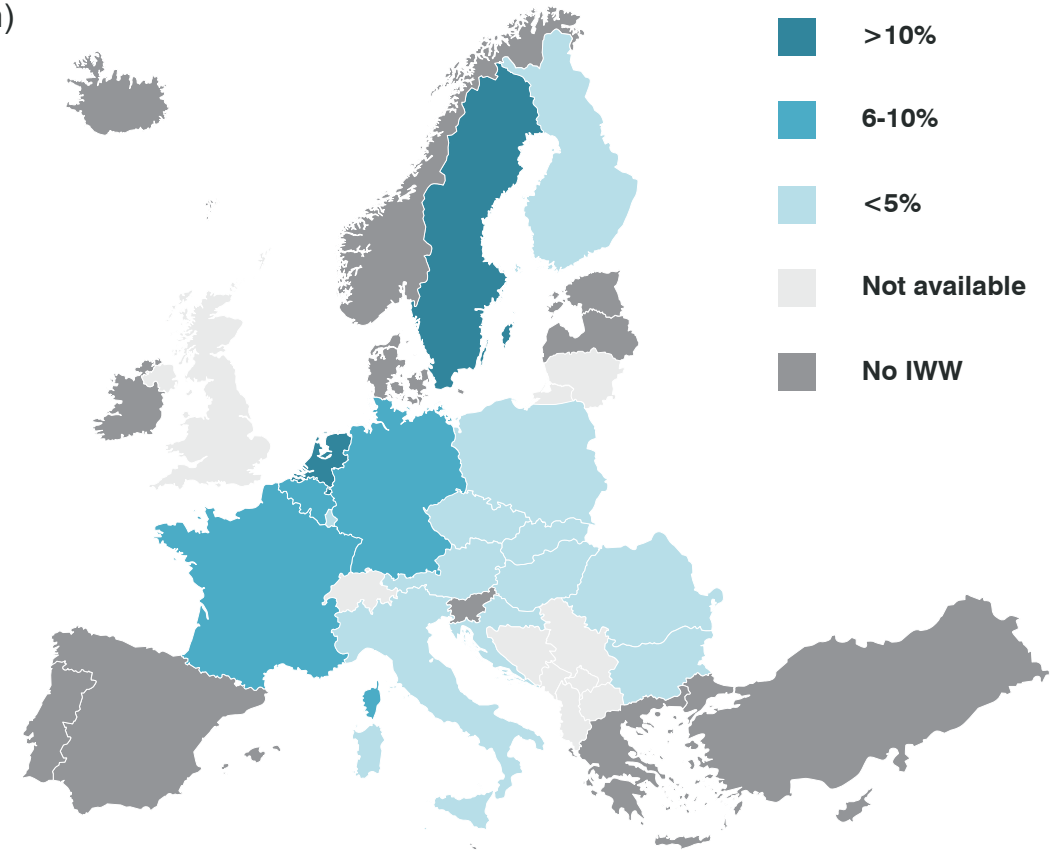
Source: Eurostat rail_go_grpgood as of 29/7/2026; SCI Multiclient Study "The European Intermodal Rail Freight Market 2026"

- **While Combined Transport plays a significant role in most rail freight markets, it is especially important in Southern Europe**. However, except for Italy, these markets tend to be much smaller in size than markets in Central Europe. The highest shares are found in Greece (94%), Ireland (78%) and Norway (64%).
- **In Eastern Europe, the share of CT is generally lower due to the historically bulk-centred rail freight systems** that were designed for the transport of coal, ores and timber. Following the integration into the European Single Market, the structure of the rail freight market in Eastern Europe is increasingly tilting towards CT.
- **Several countries like Ireland, Germany and the Netherlands have seen an increase in CT share since 2023.** However, this mainly reflects the decline in conventional bulk rail freight in these countries, such as the suspension of Tara Mines traffic in Ireland or the sharp decline of chemicals and other bulk goods in Central Europe.

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Inland waterways: Combined Transport is mostly used for hinterland traffic from North Sea ports

Map of CT share of IWW freight transport in Europe by country in 2025
(% of total inland freight tkm)



Source: Eurostat iww_go_atygo as of 26/8/2026; Eurostat iww_go_actygo as of 26/8/2026

- **In all countries with IWW transport, Combined Transport is of moderate to low importance**. The sector is mostly concentrated along the Rhine and its tributaries and supporting canals. It is mainly used to connect the ports of Rotterdam and Antwerp with hinterland hubs such as Duisburg, Neuss, Mannheim or Strasbourg. The majority of IWW transport in Europe still consists of dry and liquid bulk.
- **The countries with the highest shares of CT are Sweden (19%), the Netherlands (12%) and Germany (10%).** However, in absolute numbers, CT in Sweden is insignificant at 20 million tkm, or less than 0.2% of all CT transport on inland waterways in Europe.

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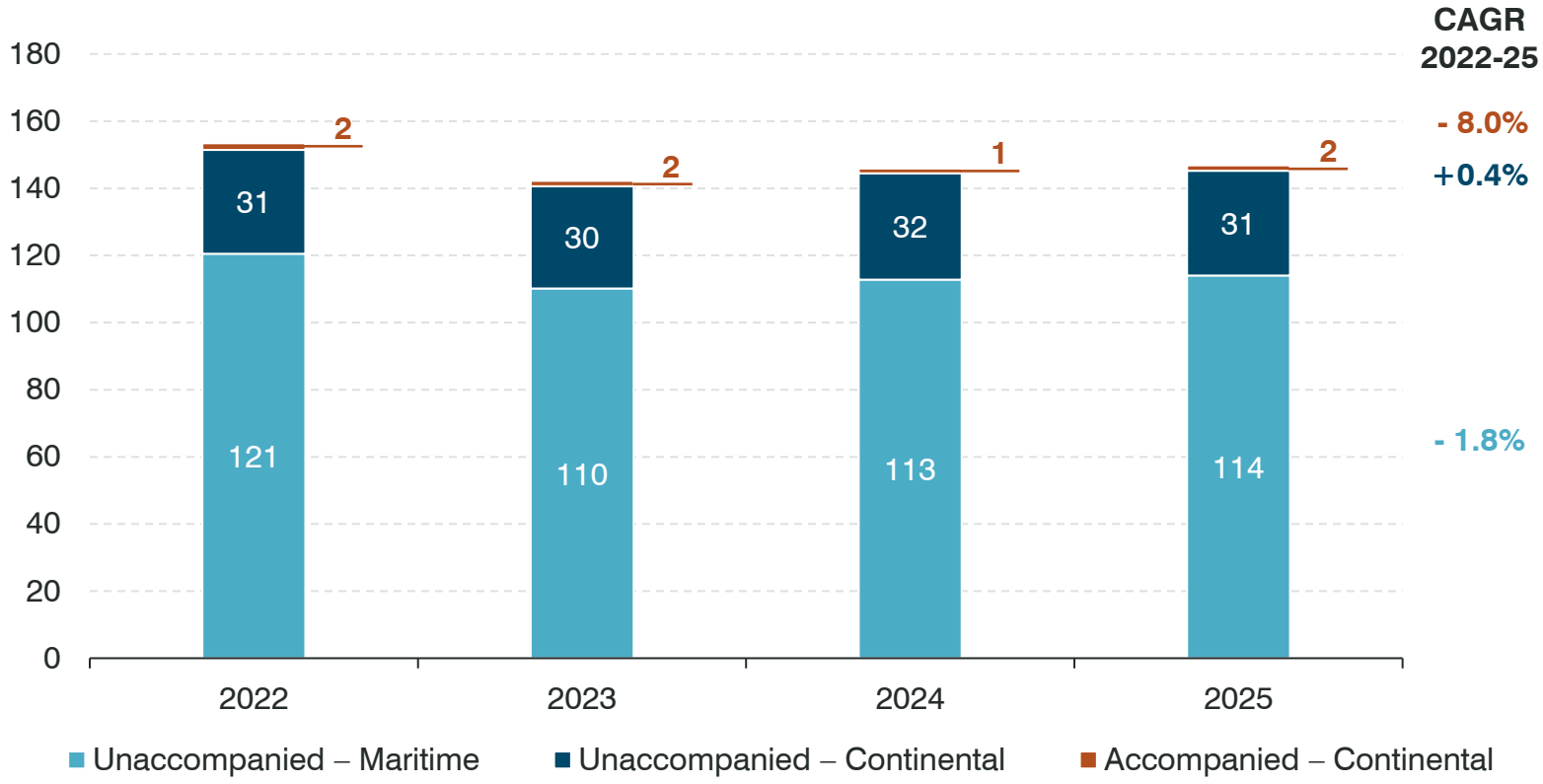
03

Transport volumes in road–rail Combined Transport

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Combined Transport performance dropped significantly in 2023 and is still recovering

Development of CT transport performance by segment
(billion tkm)



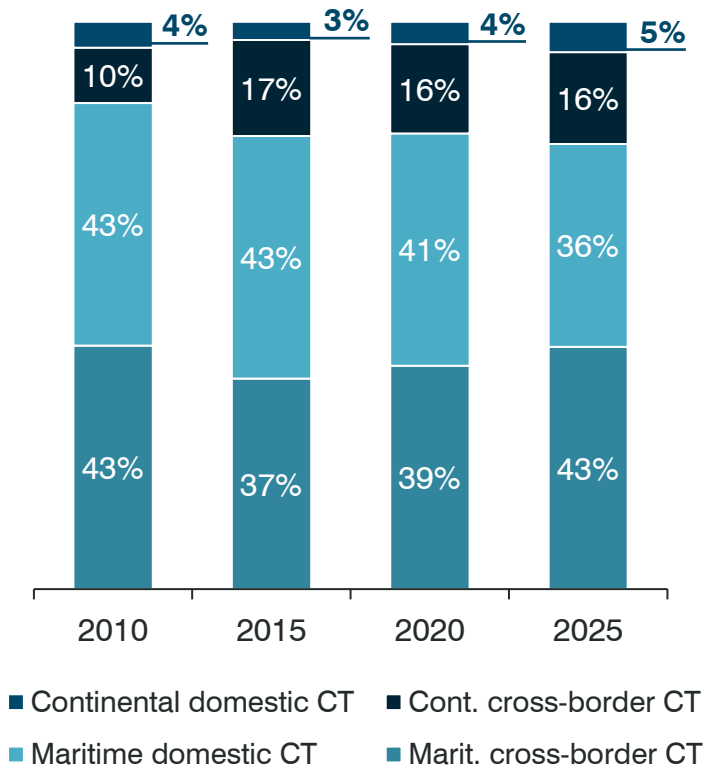
- **The most important segment in Europe is unaccompanied maritime CT,** which consists of the transport of standardised sea containers (20 ft, 30 ft, 40 ft or 45 ft) between ports and hinterland hubs and terminals. In 2025, this segment accounted for more than 75% of CT by transport volume.
- **Unaccompanied continental CT,** which consists of the transport of semi-trailers and swap bodies, is the second-most important segment and was **the only segment showing a marginal growth between 2022 and 2025**.
- **Accompanied continental CT experienced the largest decline in transport performance between 2022 and 2025.** However, the segment remains marginal with about 1% market share. It encompasses mostly transalpine connections on so-called rolling motorways.

Source: SCI Verkehr based on Eurostat rail_go_contwgt as of 28/8/2026 and UIRR Statistics

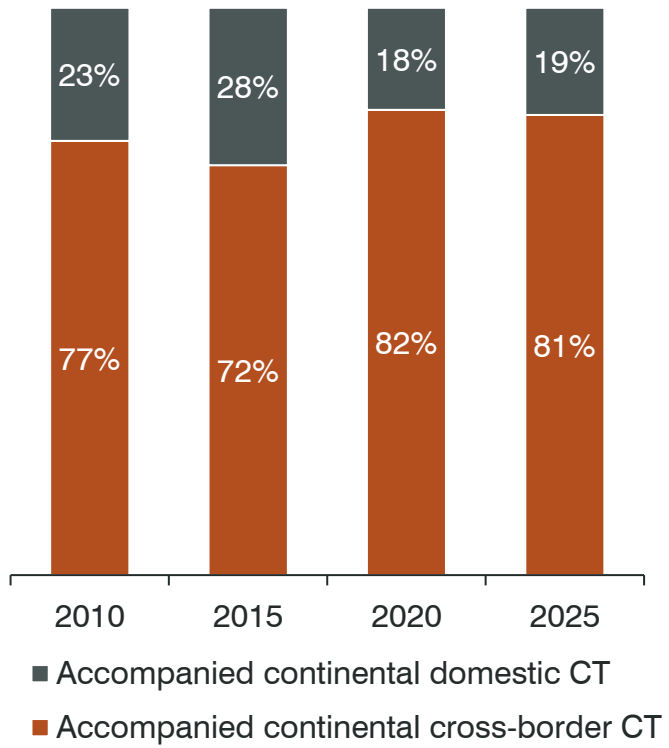
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Almost 60% of all Combined Transport in Europe is produced on cross-border connections

Share of unaccompanied CT transport performance by type (% of tkm)



Share of accompanied CT transport performance by type (% of tkm)



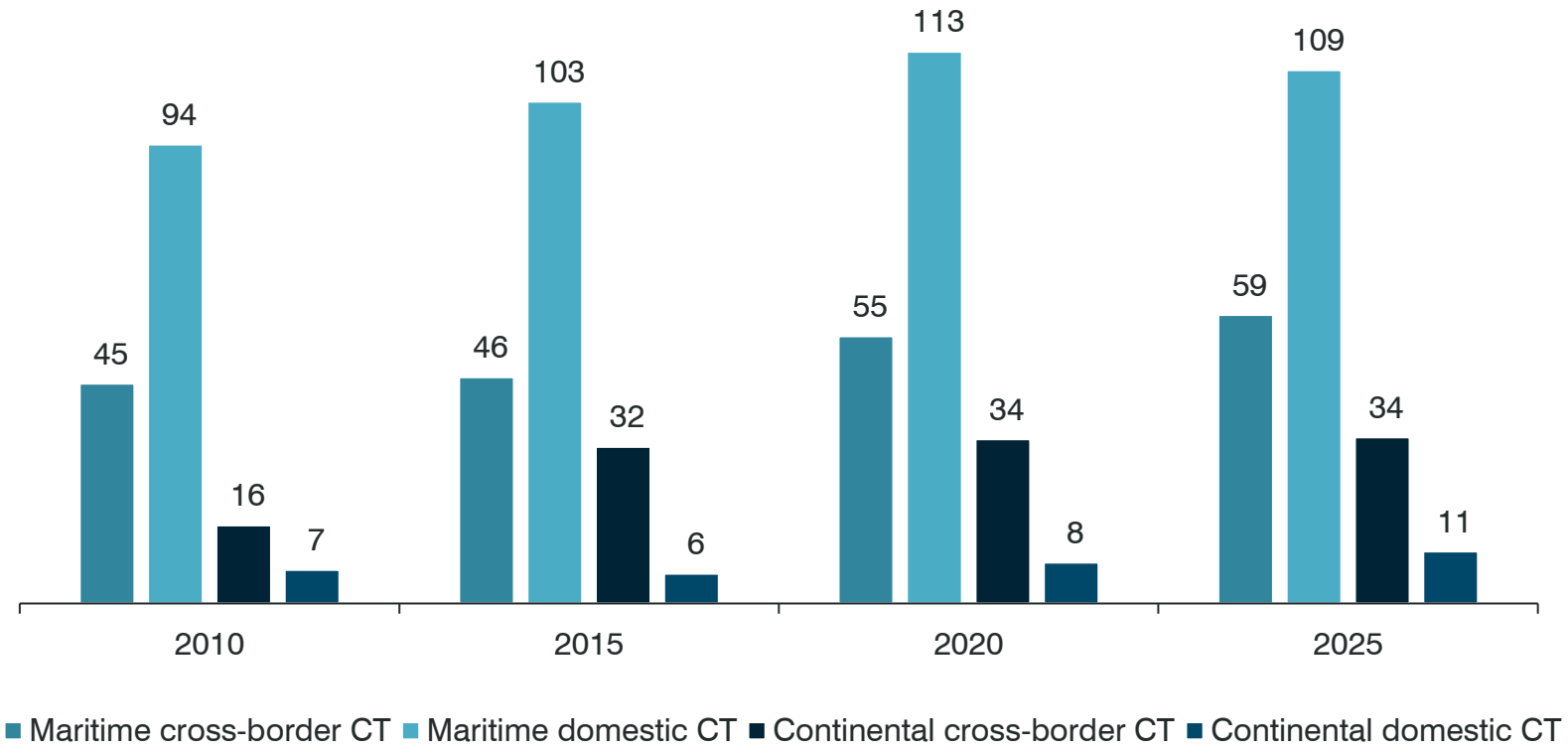
- The **share of cross-border connections in unaccompanied Combined Transport increased** from 53% in 2010 to 59% in 2025. This is mostly due to the expansion of cross-border continental CT, particularly over longer international distances, such as connections between the Adriatic region and Belgium or between Luxembourg and Poland.
- Conversely, **the shares of domestic CT contracted**, despite improvements in domestic maritime hinterland services in countries such as Spain and Poland.
- Until 2025, accompanied CT was mostly operated on cross-border connections with domestic transport having lost importance except in Austria. However, following the discontinuation of the Novara–Freiburg service at the end of 2025, the market share of **accompanied cross-border CT is expected to decline** in the coming years.

Source: SCI Verkehr based on Eurostat rail_go_contwgt as of 28/8/2026 and UIRR Statistics

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Unaccompanied Combined Transport volumes stagnated between 2020 and 2025, with positive developments in the maritime cross-border and continental domestic segments

Development of unaccompanied CT transport volume by type
(million tonnes)



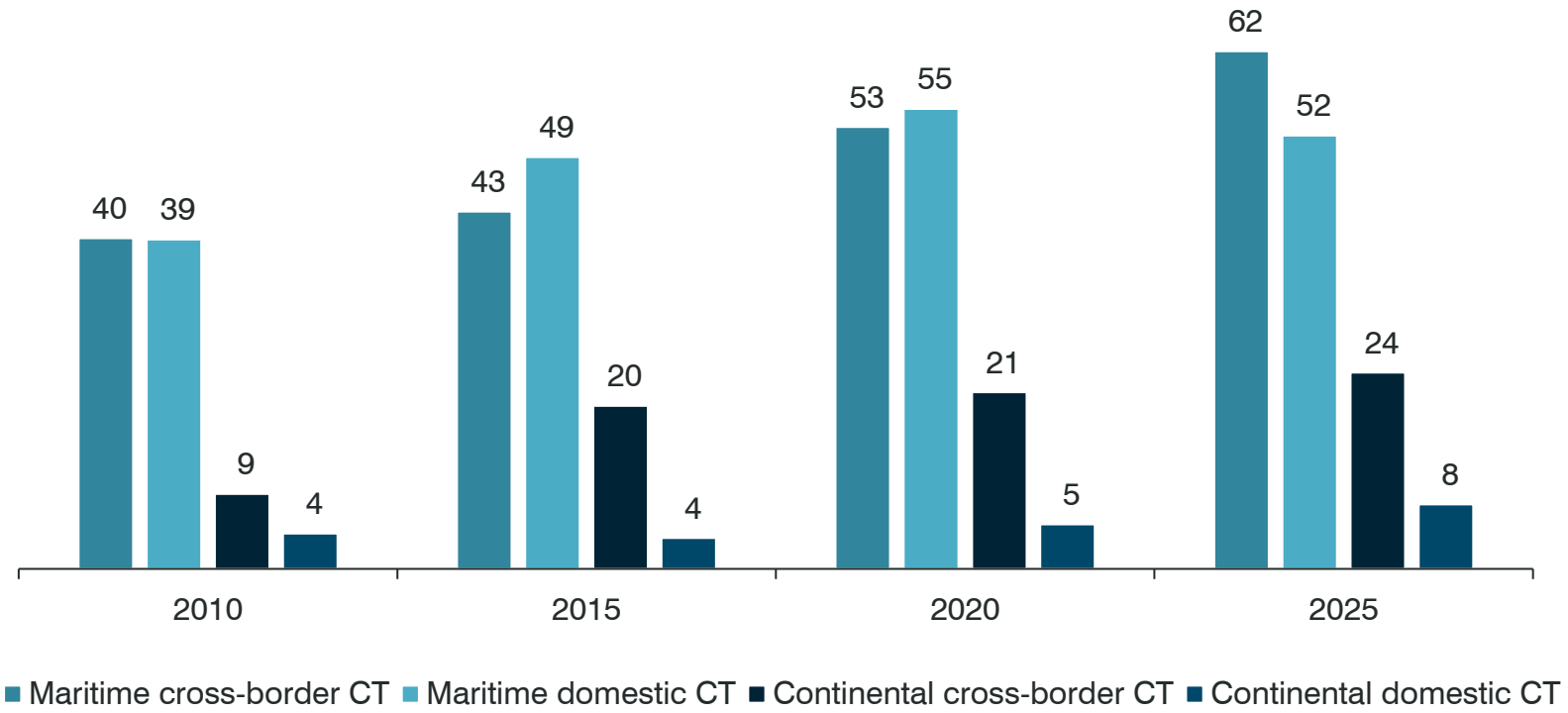
- **Unaccompanied maritime CT recorded no volume growth between 2020 and 2025.** However, while maritime cross-border CT grew by 4 million tonnes, maritime domestic CT declined by the same magnitude. As a result, cross-border maritime CT now counts for 35% of the total unaccompanied maritime CT market by volume.
- **The volume of unaccompanied continental CT grew by 3 million tonnes** during the same time period. The growth was driven by new continental domestic services in markets like France and Spain, which invested in new routes and terminals.
- **Intercontinental CT** largely contributed to the growth of maritime cross-border CT after 2014, with increasing volumes mostly to and from China. Due to the war in Ukraine, volumes were partly lost after 2022.

Source: SCI Verkehr based on Eurostat rail_go_contwgt as of 28/8/2026

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Combined Transport performance grew faster than volume since 2020, highlighting the effect of detours on rail operations

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



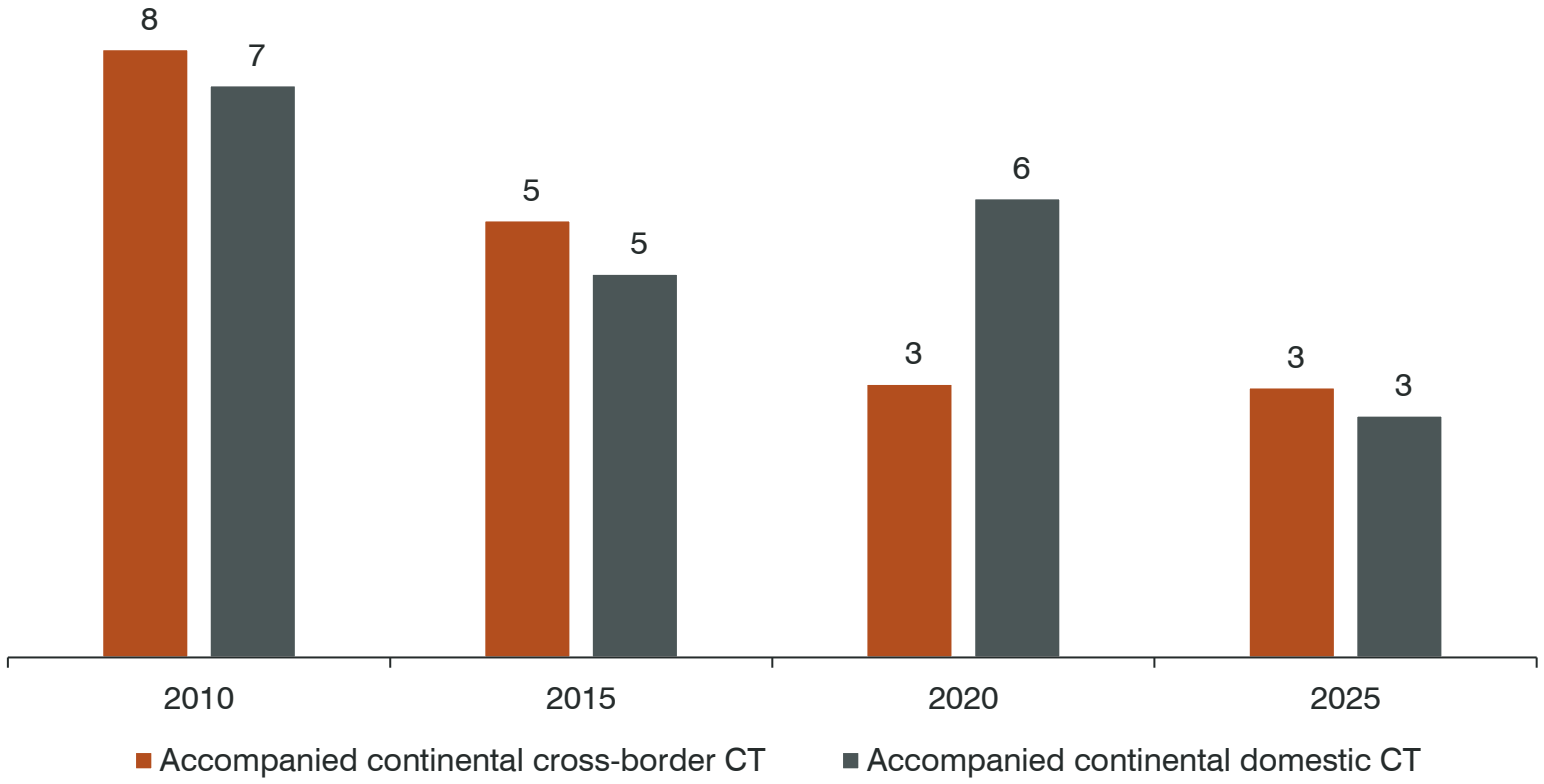
- While Eurostat data shows that maritime domestic CT performance contracted between 2020 and 2025, according to the same data source, **maritime cross-border CT performance gained almost 19%** and overtook maritime domestic CT as the most significant segment. This is more than twice as much as the growth in volume in this segment.
- Similarly, continental cross-border CT performance grew by around 15%, despite flat volumes. This supports the notion that **transport performance growth on long-running international connections was affected by unproductive detours** caused by infrastructure maintenance works and less by organic demand growth or new routes.

Source: SCI Verkehr based on Eurostat rail_go_contwgt as of 28/8/2026

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Accompanied Combined Transport lost volume after 2010 as services were discontinued

Development of accompanied CT volume by geographical and transportation type
(million tonnes)



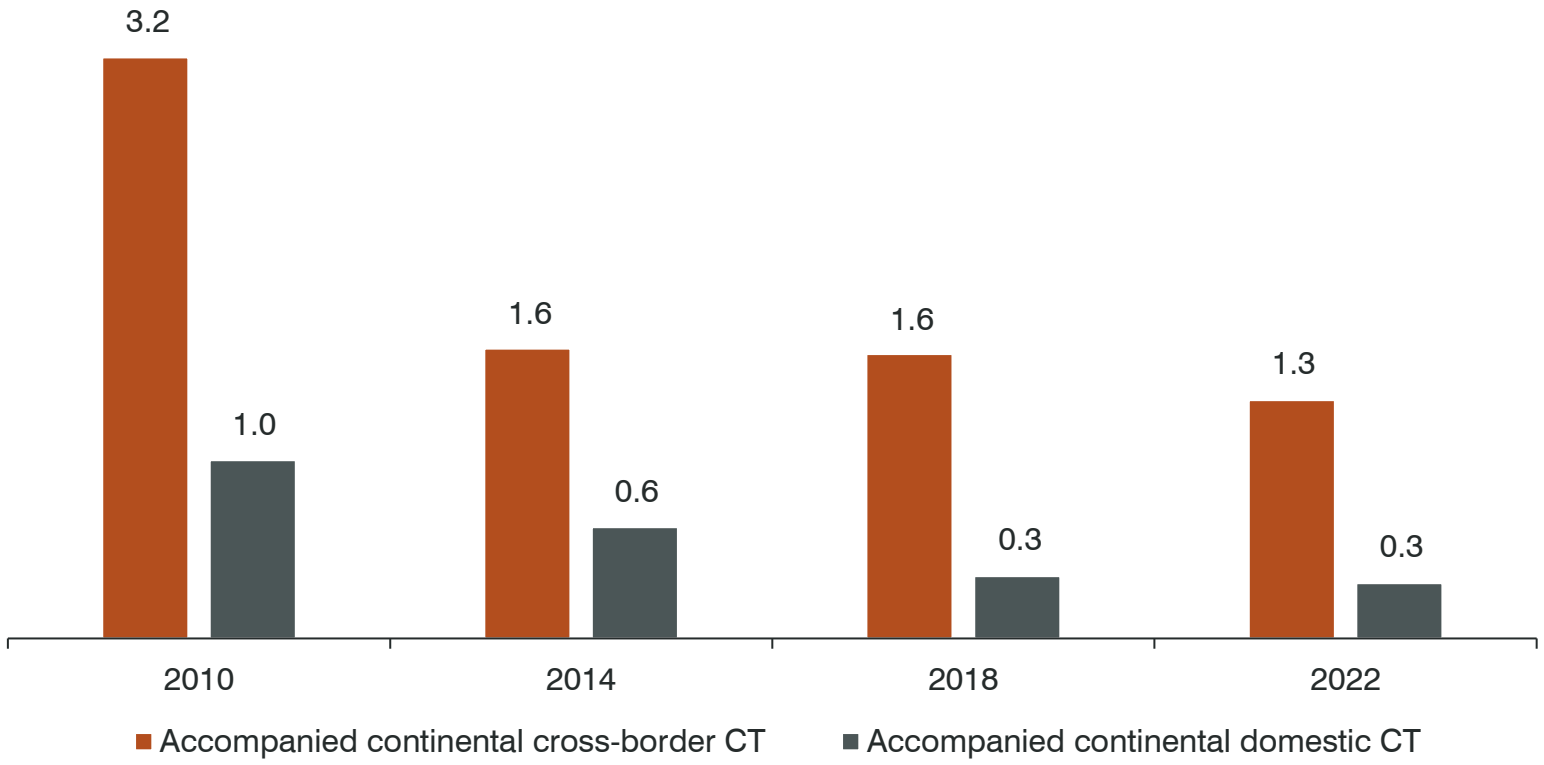
- **Accompanied continental cross-border Combined Transport volumes decreased by over 60%** between 2010 and 2022. This was caused by a discontinuation of several cross-border rolling motorways and a reduction of services on other connections. Between 2020 and 2025, the volumes remained stable. However, due to the discontinuation of the rolling motorway between Freiburg (DE) and Novara (IT), it can be expected that accompanied continental cross-border CT will lose significant volumes in the coming years.
- **Accompanied continental domestic CT is now largely concentrated on Austria's Wörgl–Brenner line.** Nevertheless, since 2010, its transport volumes have been similar or even higher than those of the cross-border segment, as the service has a much higher frequency.

Source: Source: SCI Verkehr based on Eurostat rail_go_contwgt as of 28/8/2026 and UIRR Statistics

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Accompanied Combined Transport performance is mostly achieved on cross-border connections

Development of accompanied CT transport performance by geographical and transportation type
(billion tkm)



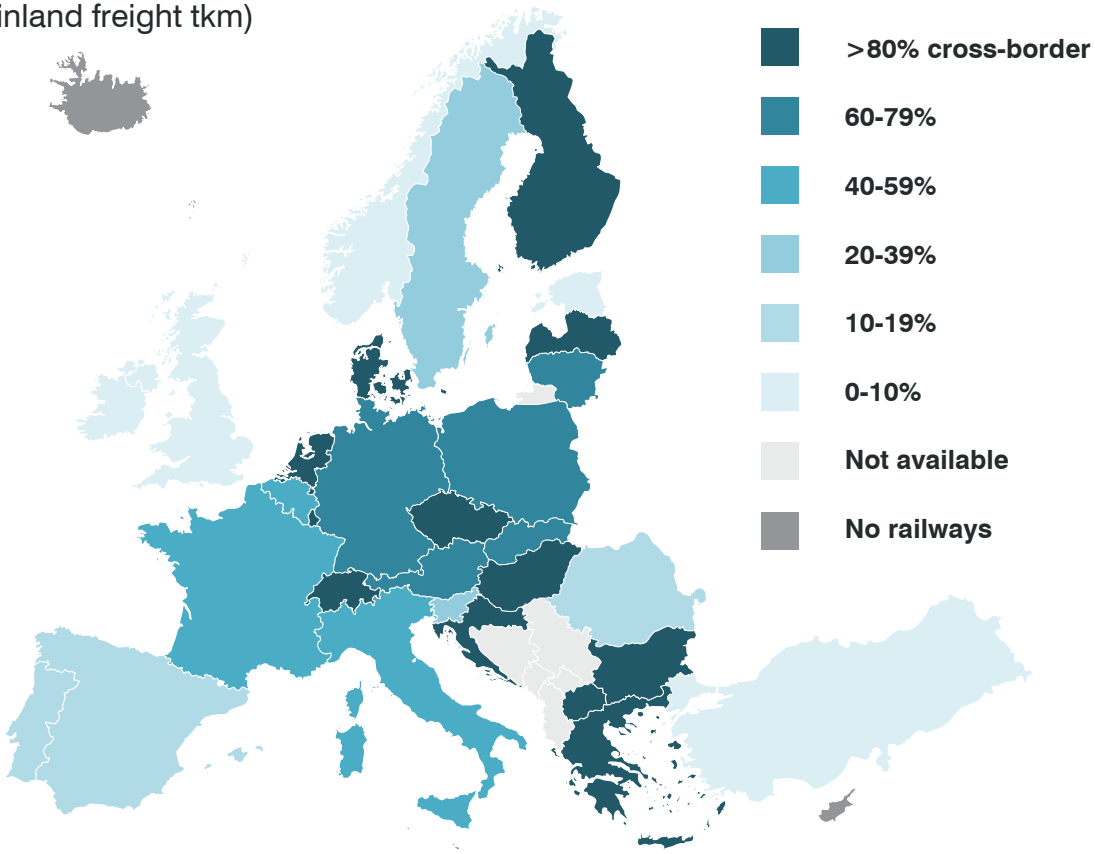
- Compared to transported volumes, the transport performance share of accompanied domestic Combined Transport is much smaller. In 2025, **the domestic segment accounted for about 47% of the transported volume, but only around 19% of the transport performance.**
- This can be explained by the **shorter distances covered by domestic shuttle connections:** the shuttle between Wörgl and the Brenner pass only covers around 100 kilometres.

Source: SCI Verkehr based on Eurostat rail_go_contwgt as of 28/8/2026 and UIRR Statistics

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The European Combined Transport market is highly integrated, with cross-border connections playing a major role in most national markets

Map of share of CT transport performance on cross-border connections by country in 2025[1] (% of total inland freight tkm)



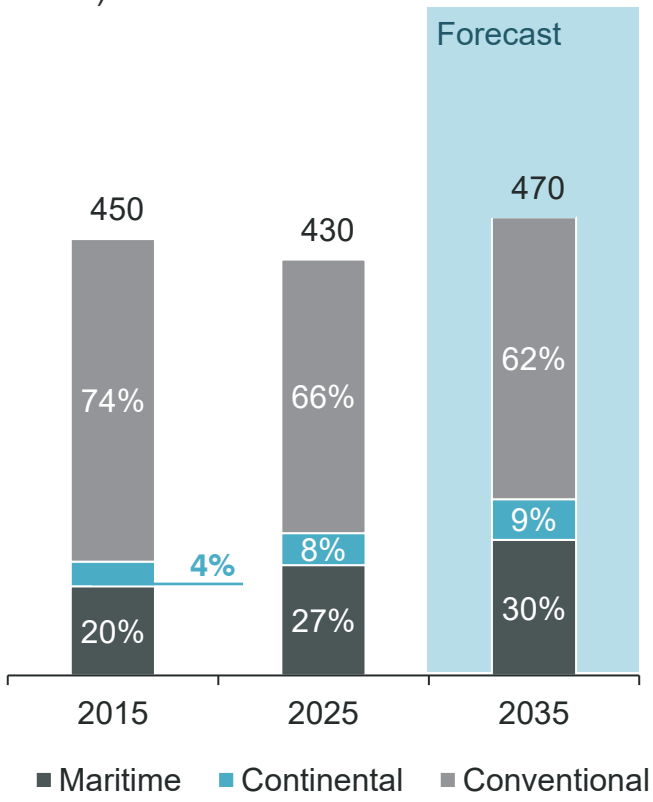
- In most countries, **cross-border connections are important for the national Combined Transport market,** with shares of around 40% and more.
- Cross-border connections are particularly **important for smaller rail freight markets**, where domestic transport demand is limited, as in Hungary and Denmark. But smaller countries with major ports, such as Greece, Croatia or the Netherlands, or key transit countries like Switzerland also have high shares of cross-border connections.
- Conversely, **markets with the highest shares of domestic transport are found in countries on the periphery of Europe**, isolated from the European core network by geography (Ireland, Norway), diverging track gauges (Spain, Portugal, Finland) or infrastructure bottlenecks (United Kingdom, Turkey).

Source: Eurostat rail_go_contwgt as of 28/8/2026; 1) For DK, EE, LV, TR: Eurostat data from 2024; for AT, BE, SE: Based on RNE data

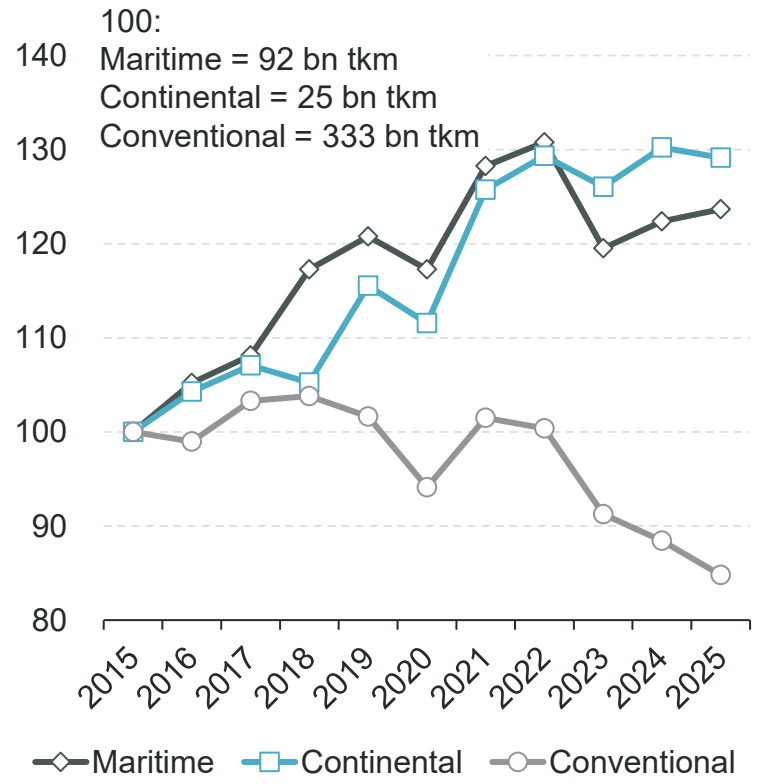
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Continental Combined Transport is becoming increasingly important for rail freight operations

Development of CT rail share of total rail freight
(% of tkm)



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



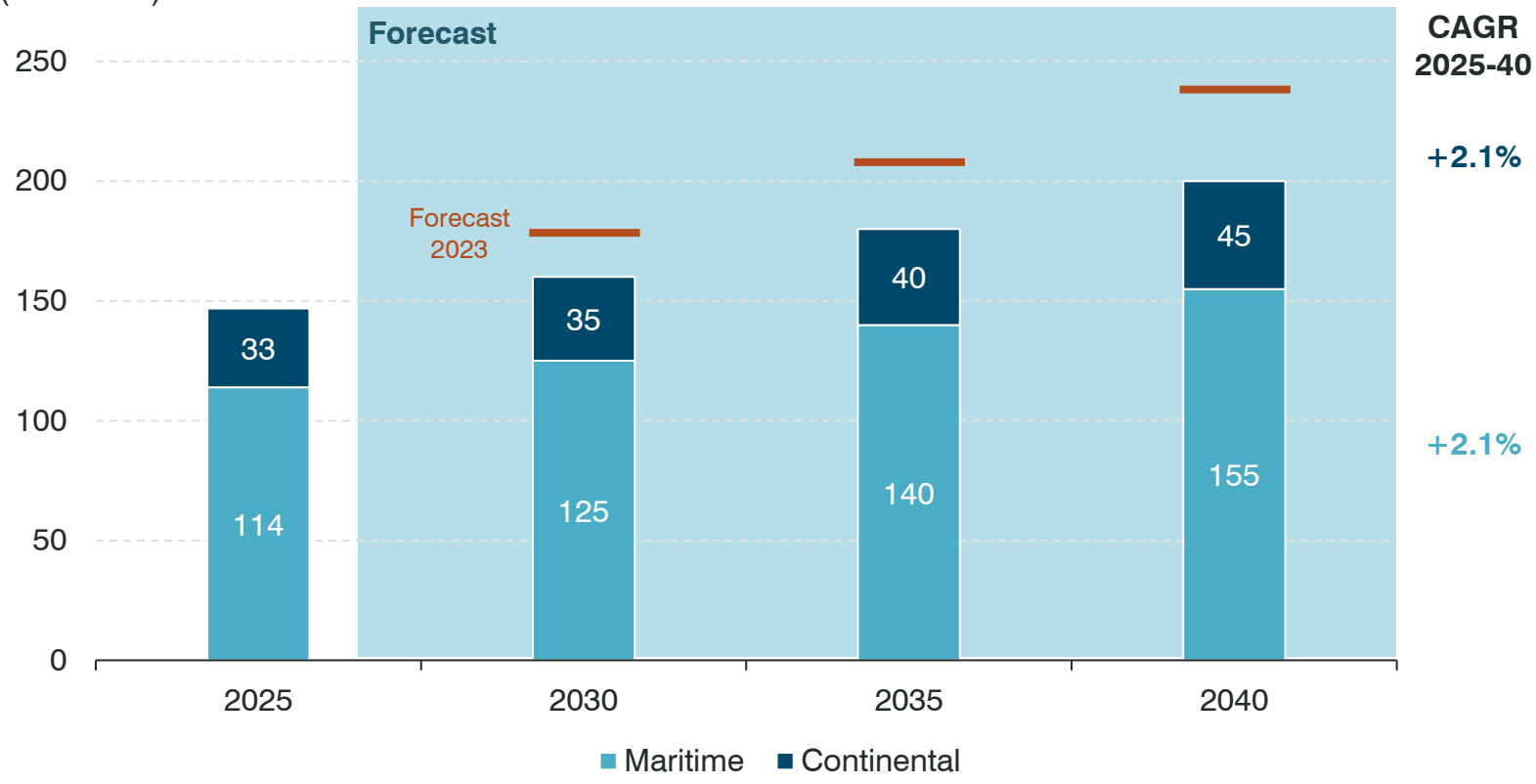
- **Continental Combined Transport is gaining in importance in rail freight and grew by 30% between 2015 and 2025**, outperforming maritime CT – despite moderate growth since 2022.
- The main drivers were the **improvement of suitable terminal infrastructure** as well as the introduction of new loading units.
- The **increasing shortage of lorry drivers** and the lower maintenance costs for semi-trailers used in Combined Transport compared to exclusively road haulage are also driving this development.
- **For the coming years, an expansion of the continental CT network is expected.** However, recent years saw delays on planned line openings in Spain and France, and cross-border connections suffer from restricted capacity in Germany as an important transit land.

Source: SCI Verkehr Rail Freight Market Forecast; SCI Multiclient Study “The European Intermodal Rail Freight Market 2026”

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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)



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

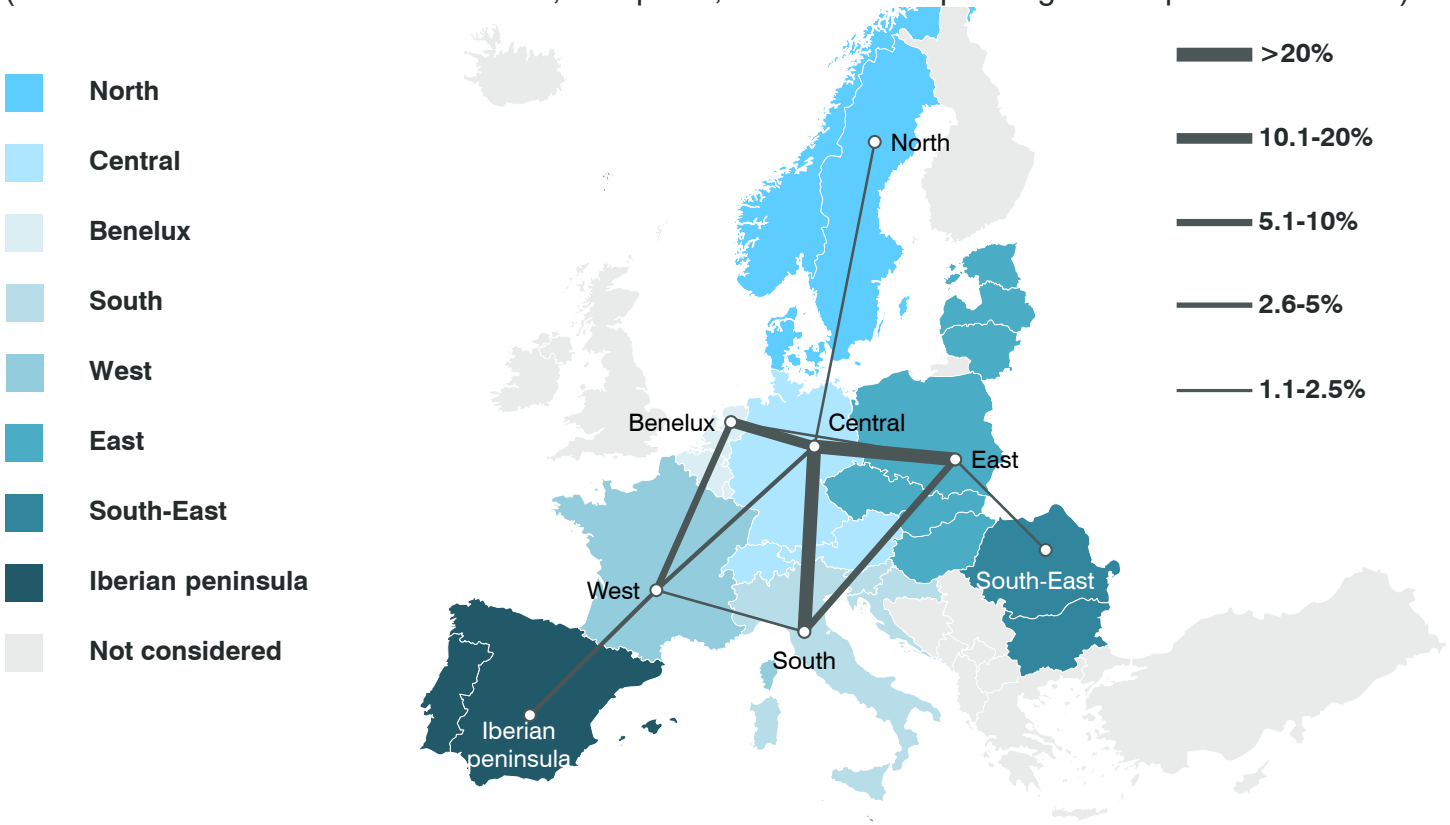
- SCI Verkehr compiles a Rail Freight Market Forecast based on the IMF Economic Outlook. As the expected rebound of economic activity in Europe is further postponed, **the outlook for Combined Transport is less positive than in 2023**, when a growth of 3% p.a. was expected until 2040.
- While the belated 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.

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04 Corridors and trade lanes

Three of four cross-border Combined Transport connections travel through Central Europe, but corridors to and from Eastern Europe are gaining in importance

Map of cross-border CT flows[1] in Europe by route between European regions in 2025
(% of number of international CT trains; Sample: 1,188 CT trains operating in Europe 13-20/9/2025)



- **The three leading Combined Transport corridors in Europe all connect the Central region** (AT, CH and DE): Central – South (32%), Central – East (23%) and Central – Benelux (16%). This shows the pivotal role of the German market as key hub in the European CT network.
- In total, **76% of all cross-regional trains start or end in the Central region**. The South (HR, IT, SI) ranks second with 43% of all trains starting or ending here, including some trains also running to or from the Central region. East (CZ, HU, PL, SK) ranks third with 34% of all cross-regional trains running to or from that region.
- Until now, the **Iberian peninsula** had only a small share of cross-border connections, due to the difference in gauge with the rest of continental Europe (Iberian broad gauge). However, Spain is currently upgrading its rail infrastructure along TEN-T corridors to standard gauge. Once implemented, this will facilitate connections between Spain and the rest of Europe.

Source: SCI Verkehr based on train information data provided by RNE

1) 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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On average, more than 65 Combined Transport trains operate on transalpine routes between Italy and Central Europe each day

Important CT trade lanes in Central Europe (% of CT trains in 2025[1])

Origin	Destination	Weekly trains	Share
Italy	Germany	128	20.1%
Germany	Italy	108	16.9%
Italy	Belgium	61	9.5%
Belgium	Italy	60	9.3%
Netherlands	Italy	50	7.8%
Italy	Netherlands	49	7.6%
Netherlands	Germany	22	3.5%
Germany	Netherlands	11	1.6%
Hungary	Slovenia	10	1.6%
Belgium	Germany	10	1.6%
Germany	Belgium	10	1.5%
Belgium	Switzerland	9	1.5%

Cross-border routes with the highest # of CT train pairs in Central Europe (weekly CT trains in 2025[1])

Train pairs[2]	Weekly trains
Köln-Eifeltor (DE) – Verona Quadrante (IT)	31
Gallarate (IT) – Ludwigshafen (DE)	26
Rostock (DE) – Verona (IT)	22
Segrate (IT) – Zeebrugge-P (BE)	22
Melzo Scalo (IT) – Rotterdam RSC (NL)	21
Novara (IT) – Zeebrugge Britannia (BE)	20
Ludwigshafen (DE) – Verona Quadrante (IT)	17
Antwerpen (BE) – Gallarate (IT)	17
Gallarate (IT) – Rotterdam (NL)	15
Antwerpen (BE) – Gallarate (IT)	15
Gallarate (IT) – Venlo Greenport (NL)	14
Gallarate (IT) – Köln Nord (DE)	13

- Bidirectional transalpine **Combined Transport between Germany and Italy is by far the most important cross-border trade lane in Central Europe,** accounting for 37% of all CT trains in the region in an average week. In general, cross-border trade lanes are very balanced, with similar numbers of trains operating in both directions.
- The importance of the Germany–Italy corridor is also reflected in weekly train runs: **the three busiest connections in Central Europe all connect German hubs with Northern Italy.**
- Train operations can impede a clear picture of the European CT network: while many CT trains run uninterrupted between terminals, some cross-border routes involve **breaks in train runs due to the switch of traction** at suitable stations near national borders or borders between Infrastructure Managers, e.g. in Kiruna (SE), Freilassing (DE) or Chalupki (PL).

Source: SCI Verkehr based on train information data provided by CESAR-NEXT members 02-29/11/2025. This subset mainly includes connections in Central Europe and, therefore, may not be representative for the whole European CT market.

1) CT connections operated by CESAR-NEXT members
2) Connections with a counterpart in the other direction.

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The Rhine is the most important trading lane for cross-border inland waterway Combined Transport

Import and export volume of IWW CT by country in 2025 (1,000 TEU)

Exporting country \ Importing country	BE	CH	DE	FR	NL	Other
BE		43	520	91	511	9
CH	90		2	0	62	0
DE	985	9		4	772	1
FR	159	0	0		46	0
NL	698	96	1,008	85		0
Other	12	0	4	0	0	23

Import and export performance of IWW CT by country in 2025 (million TEU-km)

Exporting country \ Importing country	BE	CH	DE	FR	NL	Other
BE		19	90	14	36	3
CH	39		0	0	26	0
DE	158	2		2	138	0
FR	27	0	0		13	0
NL	52	40	170	18		0
Other	4	0	1	0	0	4

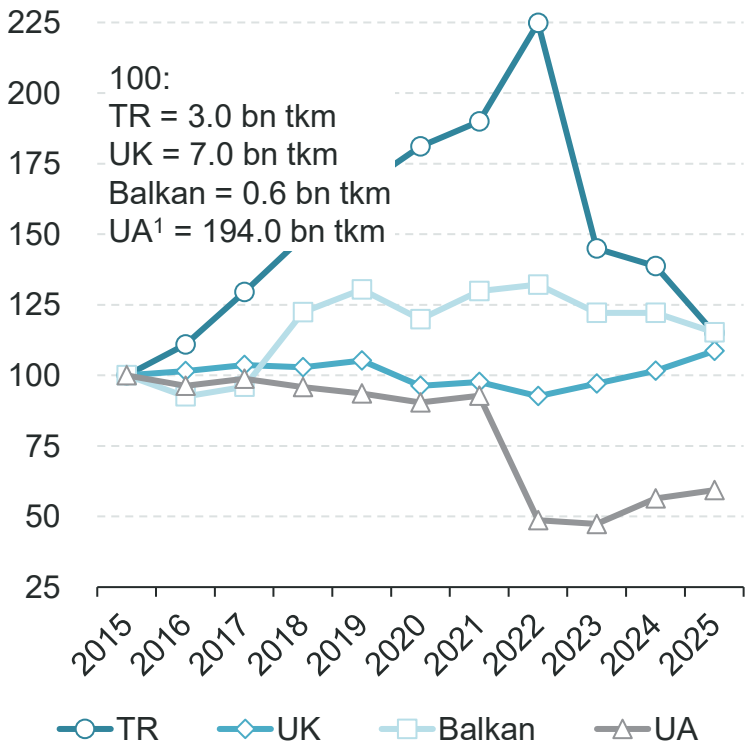
- Cross-border Combined Transport by IWW is **concentrated across Belgium, France, Germany, the Netherlands and Switzerland**. The five countries are connected by canals and the Rhine/Schelde/Moselle river system. IWW is mainly used for hinterland transport with Northern maritime ports.
- Cross-border Combined Transport by IWW outside these five countries accounts for **less than 0.5%** in **both volume and performance**. The most significant flows outside the Rhine region in 2025 were between Hungary, Austria, Romania and Slovakia.
- The most significant flows for IWW Combined Transport are reported between the Netherlands and Germany, followed by Belgium–Germany. This reflects the **strong connections between the ports of Antwerp and Rotterdam and the German hinterland on the Lower and Upper Rhine**.

Source: Eurostat iww_go_actygofl as of 14/8/2026

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The development of Combined Transport outside the EU Single Market shows opportunities for EU companies

Development of CT rail freight outside the EU single market (Index: 2015 = 100)



Planned and recently opened terminals in non-EU Member States

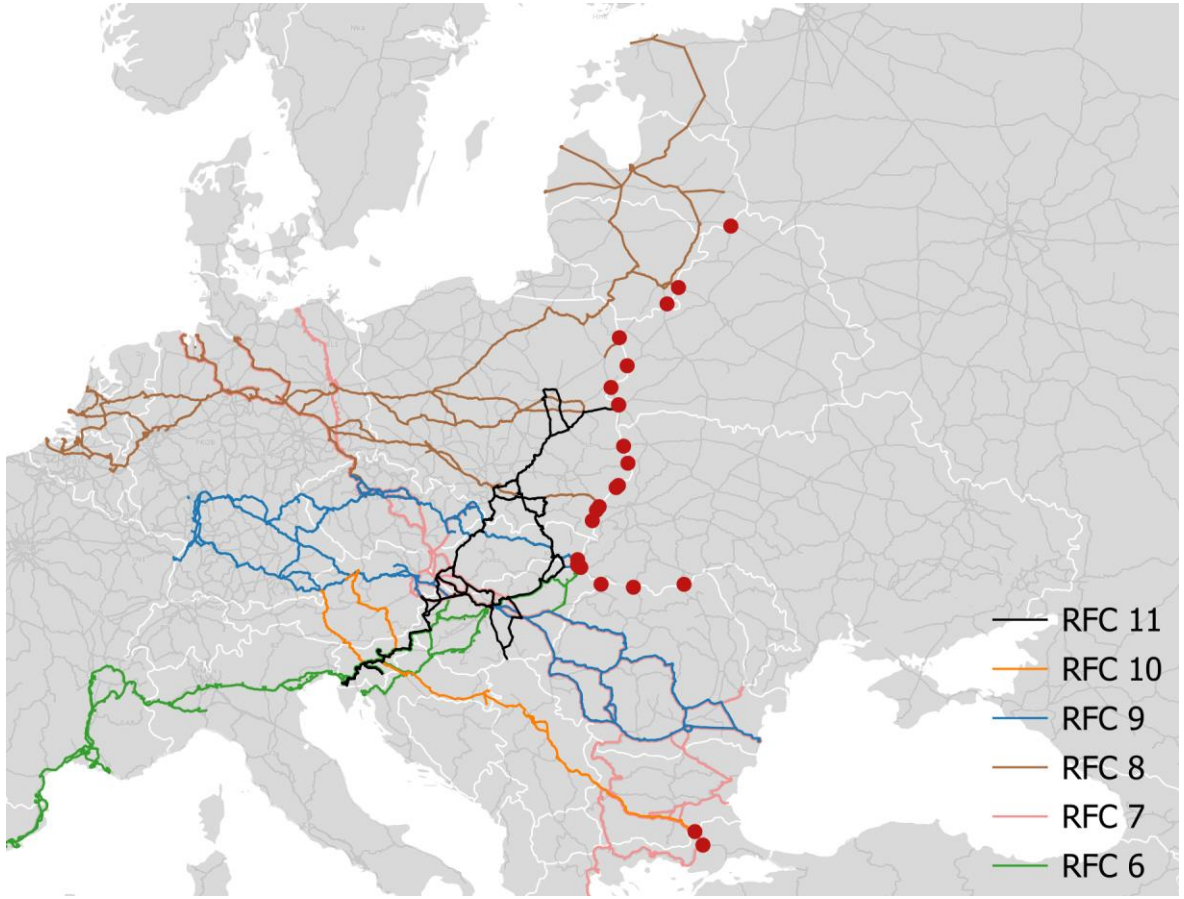
Location	Country	Opening date
Railport Istanbul-Kartepe	TR	2025
Batajnica Intermodal Terminal	RS	2026
Northampton Logistics Park	UK	2026
Eurobridge Terminal Batiovo	UA	2026
Bozuyuk Logistics Center	TR	2026
Bow Goods Yard London	UK	2030
New London Gateway 2 terminal	UK	2030
New Tilbury3 terminal	UK	2030
West Midlands Freight Interchange	UK	2034

- The rail freight market for Combined Transport developed positively in most countries neighbouring the EU. **In the United Kingdom, CT volumes have grown against the European trend** after several years of stagnation. In Ukraine, major logistics players such as MSC and HHLA are investing in hinterland terminals.
- Between 2015-2022, the Balkan countries experienced positive growth, profiting from hinterland connections from the port of Piraeus and **the establishment of RFC 10** (Alpine–Western Balkan). However, these routes were disrupted in 2023 due to Red Sea-related rerouting of Asia–Europe container services, resulting in a decline in port transhipment in the Eastern Mediterranean which affected rail transport negatively.
- **Turkey saw a steep decline in 2023**, which is partly explained by changes in the methodology of the national rail freight statistics, but also partly by the disruptions caused by the 2023 Turkey-Syria earthquakes.

Source: Eurostat rail_go_grpgood as of 26/8/2026; SCI Verkehr Rail Freight Market Forecast
1) Total rail freight transport performance, as no CT segmentation is available.

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Rail freight links with non-EU Member States to the East are expanding Combined Transport beyond Europe but are challenged by the war in Ukraine



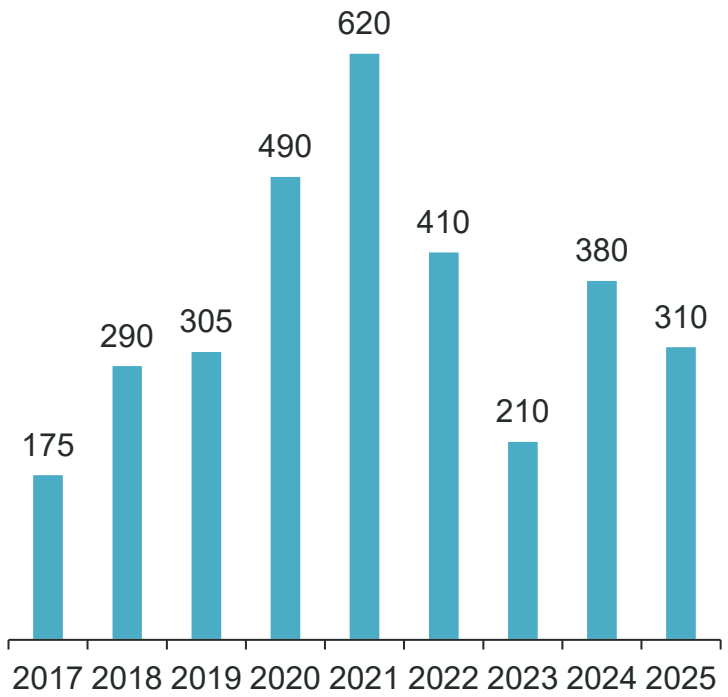
Source: SCI Verkehr based on infrastructure data provided by RNE

- Transcontinental rail freight transport with Asia is possible via direct rail links. Currently, **the New Silk Road via Central Asia is the most important transcontinental connection**. Connections to the Middle East and India via Turkey are currently under consideration.
- **The war in Ukraine has had a negative impact on transcontinental rail freight**. Several trade links between Russia and the Baltics and Finland have been lost, while transport along the Northern Corridor of the New Silk Road via Russia declined. At the same time, the Middle Corridor, providing an alternative route to Europe via Turkey, has gained in relative importance.
- **Belarus remains the main transit country for connections with Russia and China**. While rail freight to and from Belarus was impacted by the war-related traffic decline on the Northern Corridor, volumes stabilised as Chinese shippers still prefer the route over the Middle Corridor. The most important border crossings are in Brest (with PL) and Losha (with LT).
- Due to the gauge change at the Ukrainian border with Europe, **container transport became an effective solution for bulk transport between Ukraine and Europe,** enabling **fast transhipment.** In the future, integration with the European standard-gauge network is planned. Ukraine has important rail border crossings with Poland, Slovakia, Hungary and Romania.
- Despite direct access through the Middle Corridor, **rail freight transport to and from Turkey** is still mostly concentrated on trade with Europe via the rail border crossing with Bulgaria.

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Since the war in Ukraine started, maritime container transport to and from China via Russia has declined

Development of rail freight transport volume on Northern Corridor (1,000 TEU)



Competitive disadvantages of the New Silk Road

- Sanctions and war-caused disruptions in Russia make Northern Corridor less attractive.
- Middle Corridor is slow and unreliable due to shipping via Caspian Sea.
- Competitiveness is largely dependent on high prices for maritime transport.
- 2021 levels of demand affected reliability due to congestion in key terminals.
- Air transport is five times faster for three times the price.
- Rising tensions in trade with China negatively affect growth perspectives.

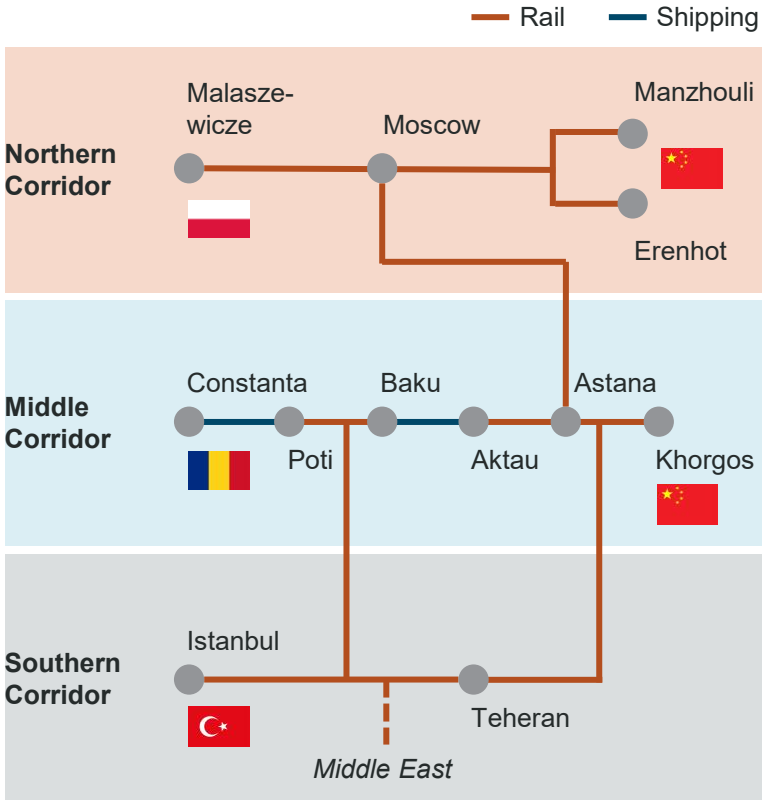
- After the Russian invasion in Ukraine, the volumes transported along the New Silk Road via Russia (Northern Corridor) declined significantly, but they have recovered somewhat in recent years. Overall, **the route has lost 50% since its peak in 2021.** This is partly due to the avoidance of Russian territory to steer clear of sanctions but also a result of lower shipping rates for maritime transport since 2023.
- Kazakhstan, Azerbaijan and Georgia promote the route via the Black and Caspian Seas, known as the Middle Corridor. This route takes significantly longer than that via Russia. Besides, it is more complex due to several transhipments in ports. Regardless, **the Middle Corridor shows a steadily increasing market share** on the New Silk Road, reaching up to 20% in some months.
- Even before the invasion, **capacity restraints at critical infrastructure nodes along the corridors** had already become visible, and these still need to be addressed if the New Silk Road is to grow beyond its 2021 levels.

Source: Eurasian Rail Alliance Index Statistics as of 26/8/2026; expert interviews

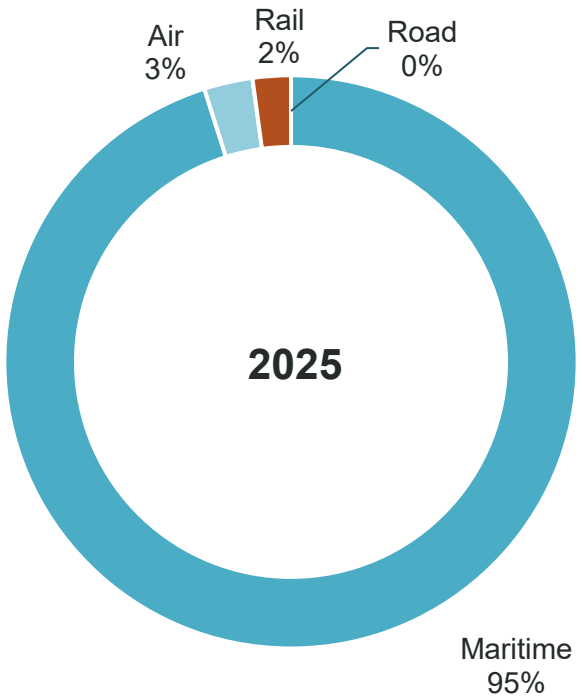
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Combined transport remains a niche for containerised transport from East Asia, but is likely to profit from increased infrastructure capacity

Main corridors of New Silk Road



Modal split for EU-East Asia[1] trade in containerised goods (% of TEU)



- Despite the ongoing war in Ukraine, countries in Central Asia and the Caucasus are further developing their railway infrastructure:
  - In 2025, **China, Kyrgyzstan and Uzbekistan** started the construction of a new rail link between the three countries.
  - The expansion of the 180 km Georgian section of **the Baku–Tbilisi–Kars (BTK) railway line** was completed in June 2026. This has increased the annual freight capacity from 1 million t to 5 million t.
  - In July 2026, **Kazakhstan** announced its plan for a CT terminal at the Iranian port of Bandar Abbas, providing access to the Indian Ocean. The country is also currently building a third railway link with China and has improved its rail links to the Caspian port of Aktau.
  - In 2025, DP World announced its plan to construct a CT terminal with an annual transhipment capacity of 150,000 TEU in **Uzbekistan**.

Source: Eurasian Rail Alliance Index Statistics as of 26/8/2026; Eurostat mar_go_qm_c2026 as of 2/9/2026; Eurostat avia_goexcc as of 2/9/2026; Eurostat road_go_ia_tc as of 2/9/2026; SCI Verkehr Raildata
1) China, Hong Kong, Japan, Macao, North Korea, South Korea and Taiwan.

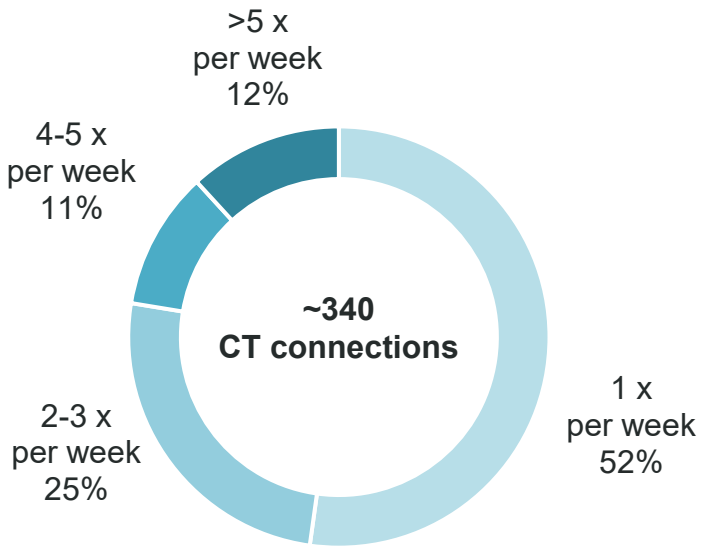
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05 Operational parameters

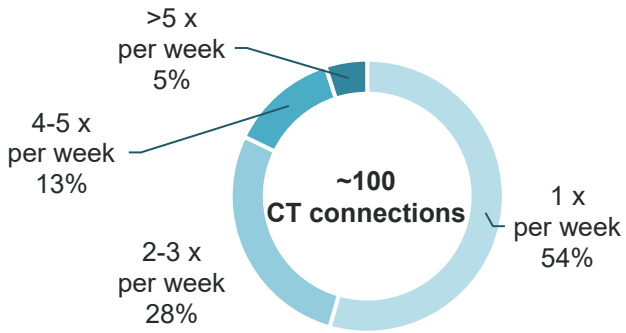
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One in seven cross-border Combined Transport connections benefits from a daily service

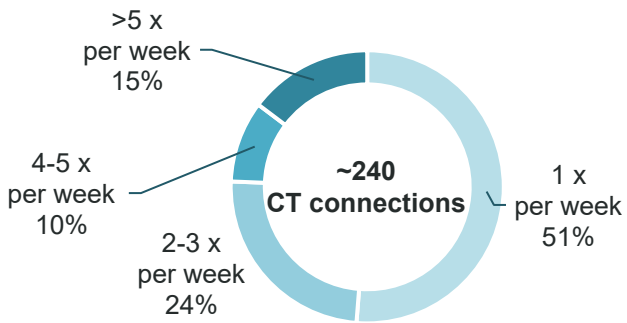
Distribution of total CT connections by services per week (% of CT trains[1])



Distribution of domestic CT connections by services per week (% of CT trains[1])



Distribution of cross-border CT connections by services per week (% of CT trains[1])



- While most Combined Transport connections are offered once a week, **23% of all connections offer at least four departures per week,** with a further 25% providing 2-3 departures per week.
- The share of connections with only one service per week is similar for domestic and cross-border CT connections. Nevertheless, cross-border connections show a higher share of connections with at least four departures a week. This highlights the **strong competitiveness of Combined Transport with road transport on Europe's main corridors**.
- The significant share of connections served once per week demonstrates that **Combined Transport can also be commercially viable outside the main corridors** as long as regular flows can be expected.

Source: SCI Verkehr based on train information data provided by CESAR-NEXT

1) CT connections operated by CESAR-NEXT members 02-29/11/2025. This subset includes mainly connections in Central Europe and, therefore, may not be representative for the whole European CT market.

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Combined Transport is increasingly challenged by deteriorating operational parameters

Average distances, transit times, speeds and transit delays by corridor
(Sample: CT connections operating in Europe 12-20/9/2025[1]; in brackets: values from last report)

Corridor	Sample size of trains	Av. distance (km)	Av. transit time (h:min)	Av. speed (km/h)
East	395	160 (170)	6:50 (6:40)	24 (26)
Central – South	280	475 (525)	11:50 (11:00)	41 (48)
Central	240	305 (595)	6:25 (11:10)	48 (53)
Central – East	190	410 (530)	11:20 (12:45)	37 (42)
Central – Benelux	140	470 (545)	10:10 (6:40)	46 (46)
North	70	375 (230)	6:50 (2:45)	55 (80)
South – East	55	870 (660)	27:35 (21:15)	32 (31)
Benelux – West	40	622 (410)	11:40 (11:05)	53 (37)
East – South-East	25	335 (345)	11:55 (24:45)	28 (14)
Central – West	15	530 (490)	10:00 (11:45)	53 (42)
Central – North	15	610 (815)	13:30 (9:45)	45 (84)
Benelux – South	15	1,210 (1,080)	33:00 (26:25)	37 (41)

- **Average distances** on most corridors connecting the Central region have decreased since 2023. This may be a market reaction to the increased unreliability on longer distances due to construction works and detours.
- While some corridors, such as Central – Benelux, show longer **average transit times** compared to 2023, others have improved. The most remarkable improvement was on the East – South-East corridor with a reduction of over 50%.
- **Average speeds** mostly developed in line with transit times. The worst decline happened on the Central – North corridor (45 km/h in 2025 vs. 84 km/h in 2023).
- The example of the Central – North corridor also underlines how **deteriorating operational parameters negatively affect the CT business**. The lower average speed and a higher average transit time developed in parallel to a decline from 65 trains in the 2023 sample to only 15 trains in the 2025 sample.

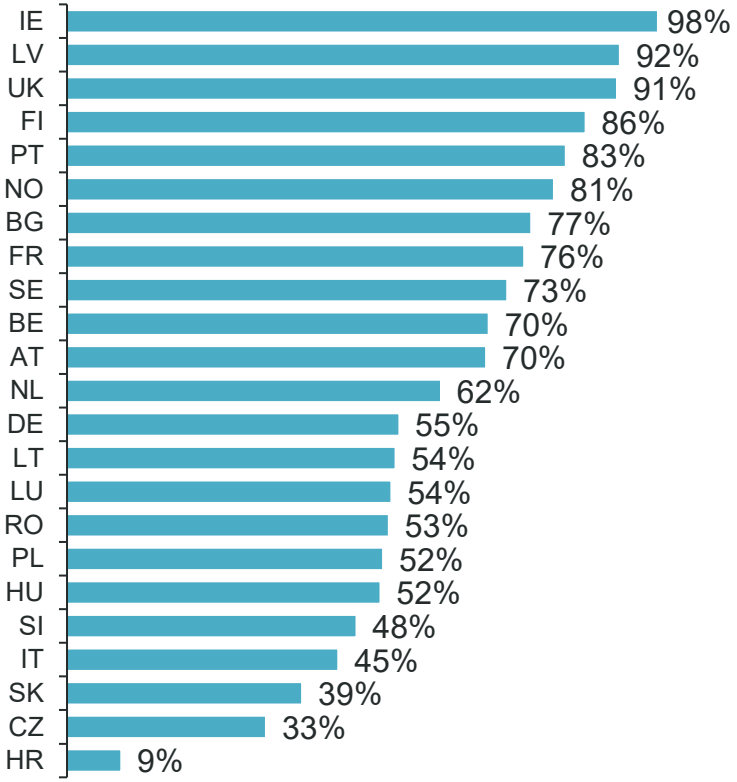
Source: SCI Verkehr based on train information data provided by RNE

1) 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.

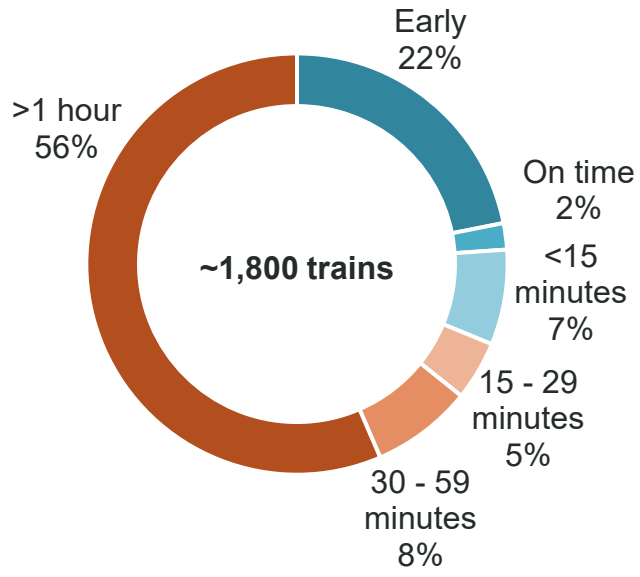
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Punctuality continues to deteriorate across Europe

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



Delayed CT trains 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.

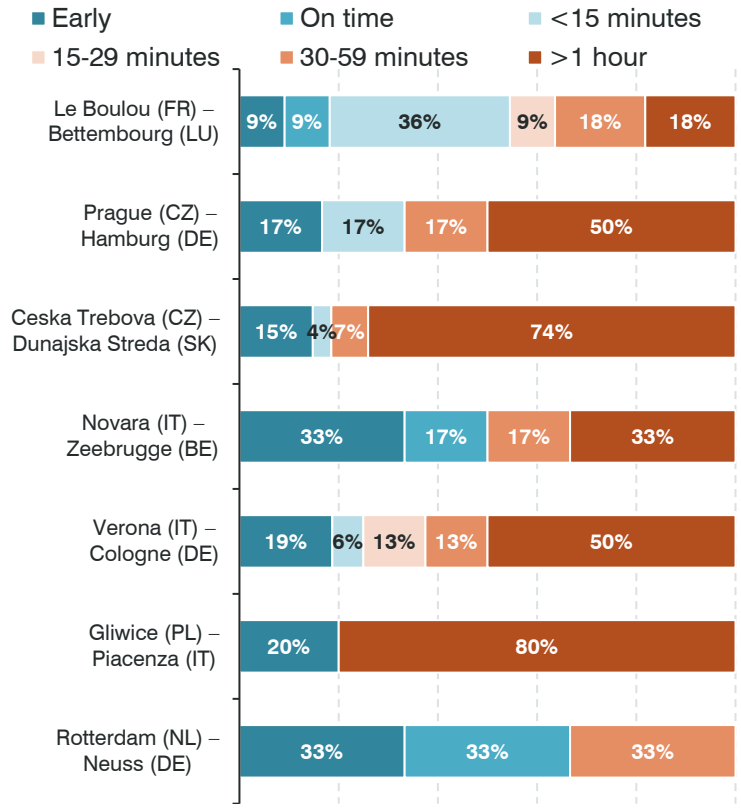
Sources: IRG-rail 14th Annual Market Monitoring Report 2026 and train information data provided by RNE

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.

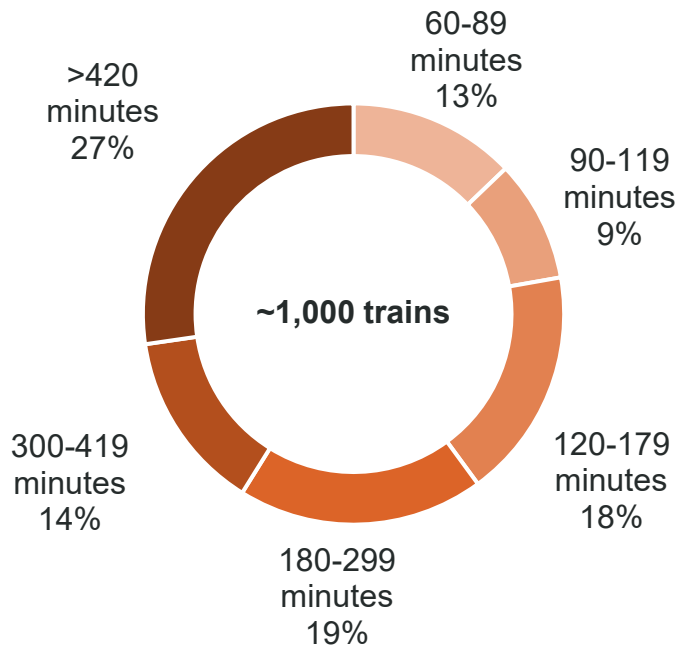
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High variability in delays on individual connections, paired with frequent severe delays, has a negative impact on the reliability of CT services for customers

Delay of selected cross-border CT train pairs by time group (% of CT trains[1])



Very delayed CT trains by time group (% of CT trains[1])



- Delays can vary considerably on a single connection. During the sample week in September 2025, **a fifth of all trains between Verona and Cologne were early, while 50% had a delay of over an hour.** In fact, all analysed cross-border connections had trains that ran early as well as trains that were severely delayed. Such high variability negatively affects service attractiveness as planned delivery windows are missed.
- Timetable data also reveals a long tail of severely delayed trains. In the sample week alone, which was chosen to exclude external disruptive factors and therefore represents a mostly stable operational environment, an average of **85 trains per day were delayed by more than three hours, with almost half of these trains delayed by more than six hours**. This impedes on-time delivery and increasingly risks a shift back from rail to road due to low reliability.

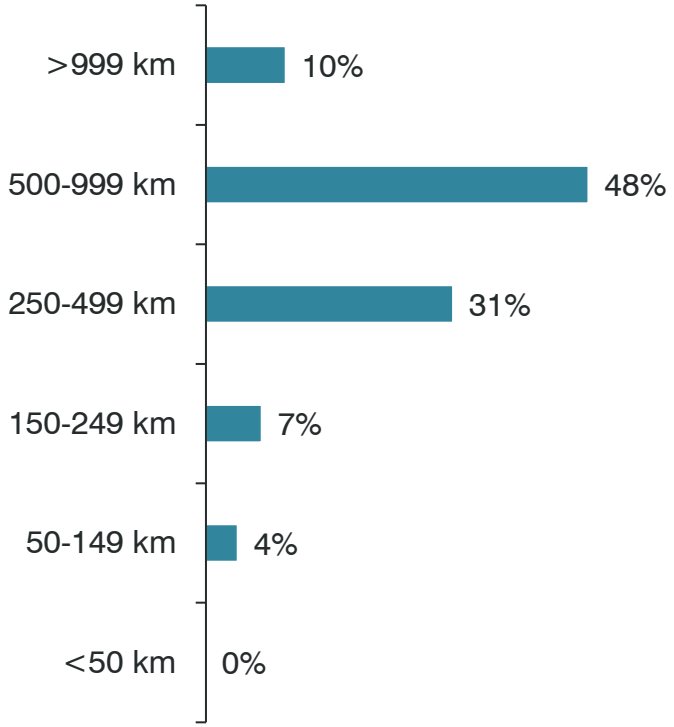
Source: SCI Verkehr based on train information data provided by RNE

1) CT connections operating in Europe 12-20/9/2023. 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.

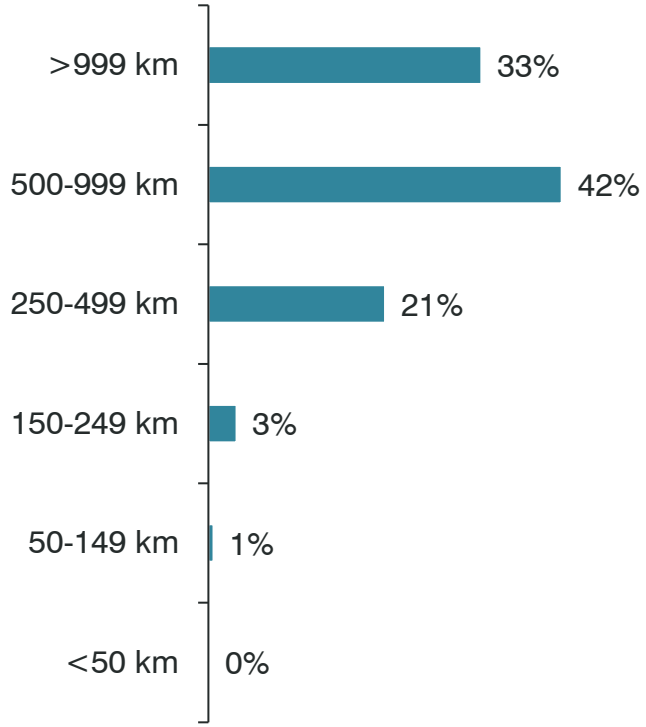
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A third of cross-border CT performance is realised on planned distances of 1,000 km or more

Weekly domestic CT connections by distance group
(% of tkm[1]; 1.6 billion tkm)



Weekly cross-border CT connections by distance group
(% of tkm[1]; 0.7 billion tkm)



- **More than half of all domestic Combined Transport (CT) performance is realised on planned distances above 500 km.** About 4% of CT performance is notionally realised on distances below 150 km. However, this might be due to the operational effects of switching traction suppliers at border crossings independently of a whole transport chain defined as Combined Transport under Council Directive 92/106/EEC, resulting in notionally domestic connections over short distances.
- **A third of cross-border CT performance is realised on planned distances over 999 km,** reflecting the longer distances on cross-border connections. However, it also shows the high importance of long-running connections for the CT market.

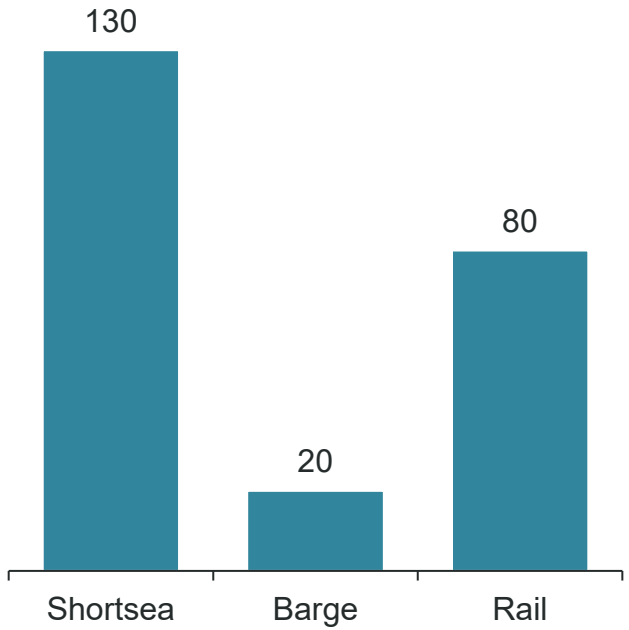
Source: SCI Verkehr based on train information data provided by RNE

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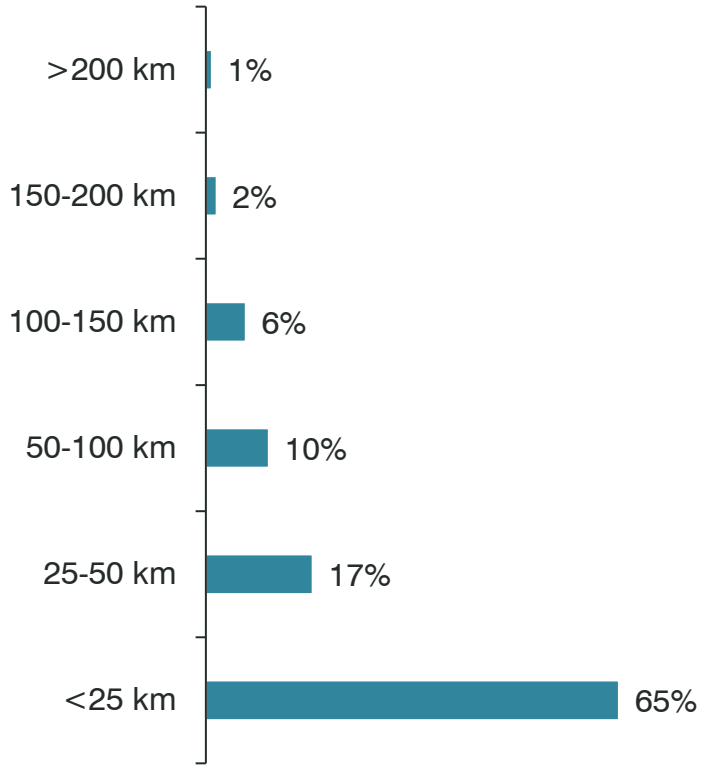
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Road legs in Combined Transport vary in length based on regional terminal density

Median road leg distances in Combined Transport by main-haul transport mode in the EU (km; 2017)



Road distances for container transport within Switzerland (% of transport volume; 2024)



- European median road leg distances (first/last mile) in Combined Transport vary by the transport mode used on the main haul. **Rail CT has a median road leg distance of 80 km**, shorter than for shortsea CT (130 km), but much longer than for IWW CT (20 km).
- **Road distances in Combined Transport chains also depend largely on national circumstances.** While in Switzerland almost two-thirds of all container transport by road has a distance of less than 25 km, the average distance of road legs in Germany is ~100 km. These averages have remained remarkably stable over recent years.
- This demonstrates the **importance of dense terminal networks with connections suitable for regional logistics demand** as shorter road distances enable road carriers to reach customers more quickly.

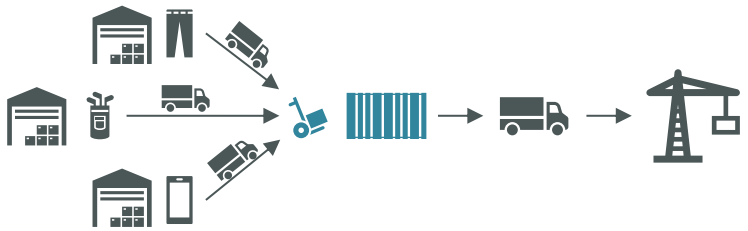
Sources: SCI Verkehr based on Federal Statistical Office Switzerland “Transportgut nach Frachtart und Distanzklasse – 2024“; European Commission report “Updating EU combined transport data”

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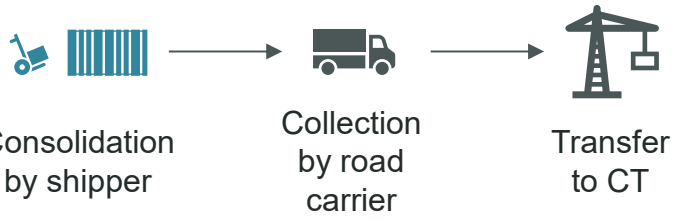
Despite higher complexity, Less than Truck Load logistics provide a significant share of revenue for Combined Transport logistics

Differences in organisation between LTL and FTL

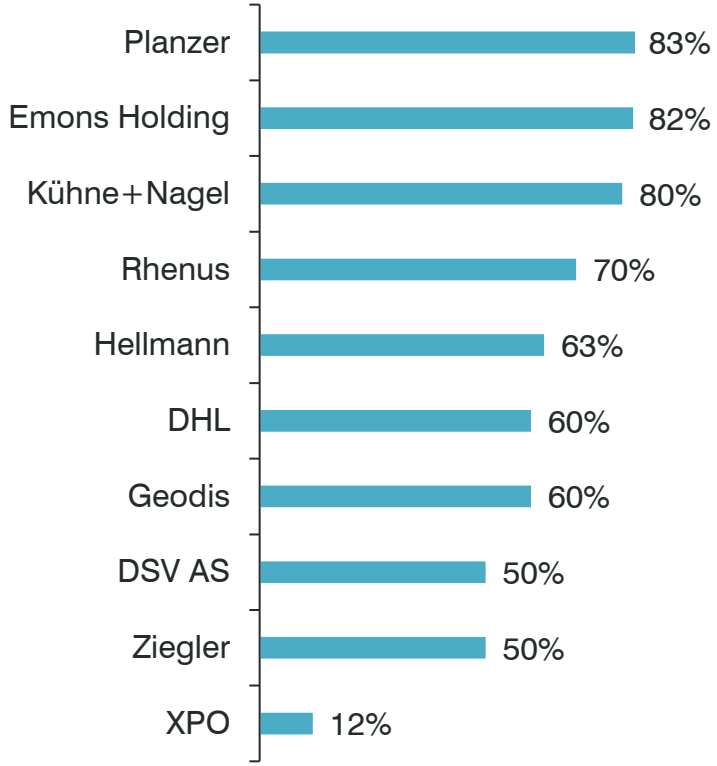
Less than Truck Load (LTL)



Full Truck Load (FTL)



LTL share for selected freight forwarders and rail carriers (% of all FTL+LTL revenue; 2023)



- By its nature, Combined Transport is an FTL business, as **whole loading units are transported**. However, the loading unit itself can either be organised as a FTL shipment or contain several LTL shipments.
- **LTL logistics are far more complex than FTL logistics**, as shipments from various shippers in the region of origin have to be consolidated by the organising freight forwarder before transport to the destination region. Once there, the shipment has to be deconsolidated and distributed by road to various end customers.
- Because of this added complexity, some freight forwarders active in CT operations, such as LKW Walter, specialise in FTL logistics. However, **many freight forwarders and carriers active in CT also offer LTL solutions**, with some companies reaching shares of over 50% of combined revenue in this segment.

Source: Companies' annual reports

About 250 Combined Transport connections per week offer horizontal transhipment all over Europe for non-craneable loading units

Availability of horizontal transhipment and RoLa services on cross-border connections
(number and % of CT trains[1])

Corridor	Weekly trains	Connections with horizontal trans.
Central – South	375	**70** (19%)
Central – East	270	**5** (2%)
Central – Benelux	190	**0** (0%)
South – East	100	**0** (0%)
Benelux – West	60	**35** (57%)
North – South	25	**5** (26%)
Benelux – South-East	20	**10** (55%)
Central – South-East	15	**5** (54%)
Benelux – South	10	**5** (50%)
Other	125	**0** (0%)
Total	**1,190**	**140** (12%)

Availability of horizontal transhipment and RoLa services on domestic connections
(number and % of CT trains[1])

Country	Weekly trains	Connections with horizontal trans.
Austria	540	**75** (14%)
France	605	**25** (4%)
Sweden	1,055	**5** (1%)
Total	**2,200**	**110** (5%)

- **Cross-border connections** offering horizontal transhipment or RoLa services have a larger share than domestic connections, both in absolute terms and relative to the total number of connections.
- On the **Central – South corridor**, over 70 connections per week offer horizontal transhipment technologies, most of them between Germany and Italy. However, the highest share is reached on the **Benelux – West corridor** with 57%, mostly connecting Luxembourg and France.
- **Austria** has the highest number of domestic connections with horizontal transhipment technology due to the RoLa service to the Brenner Pass.
- Several connections were operated in the past on the **West – South corridor**. However, despite the reopening of the Fréjus Rail Tunnel, these connections have not yet resumed.

Sources: SCI Verkehr based on train information data provided by RNE and timetable data from companies' websites

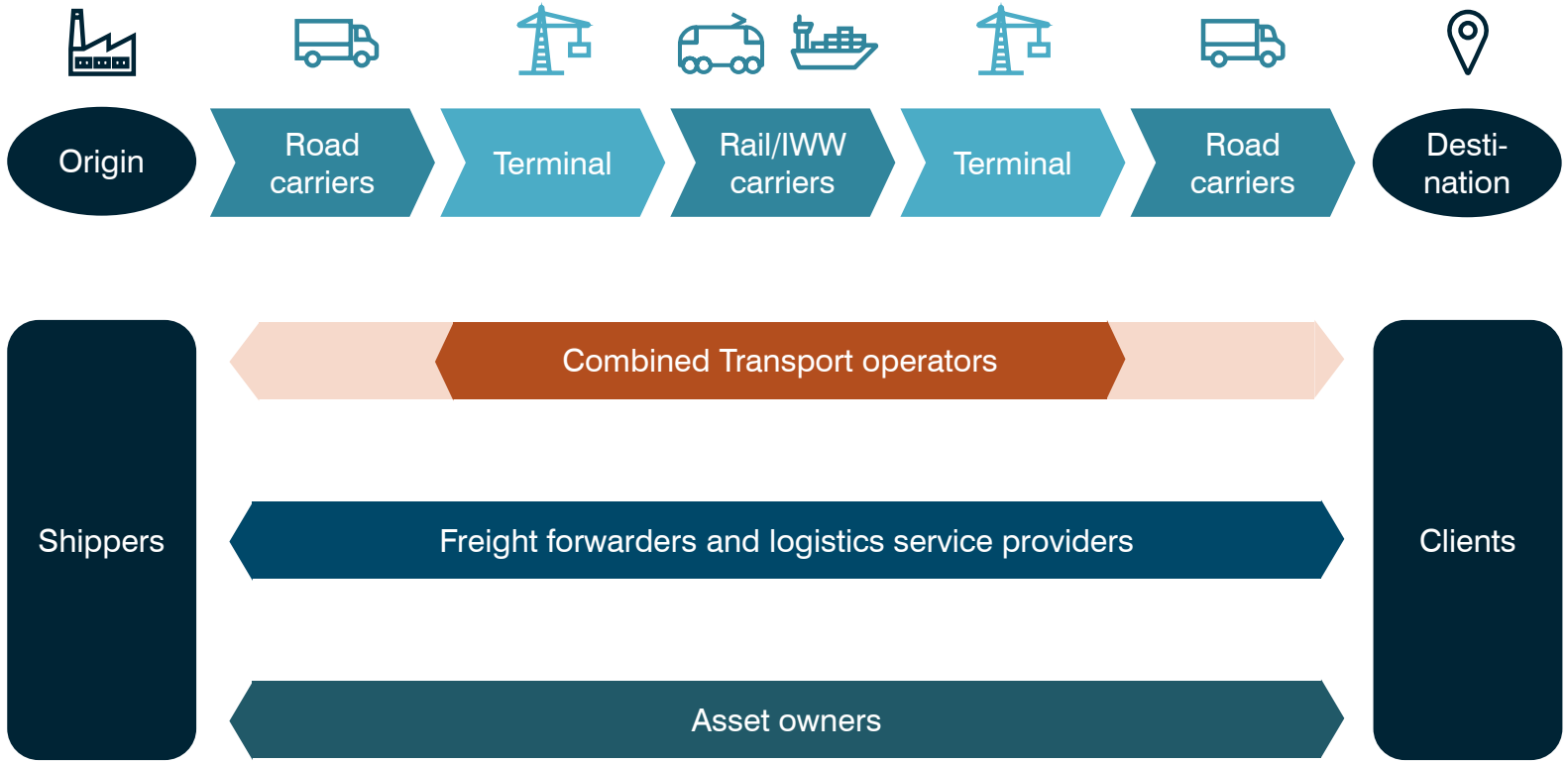
1) CT connections operating in Europe 12-20/9/2023. Due to methodological reasons, the presented data only represents a subsample of all CT connections in Europe in the sample week and may exclude existing connections. See also page 111.

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06 Stakeholders

A diverse set of stakeholders is involved in door-to-door Combined Transport chains

Stakeholders along the Combined Transport value chain

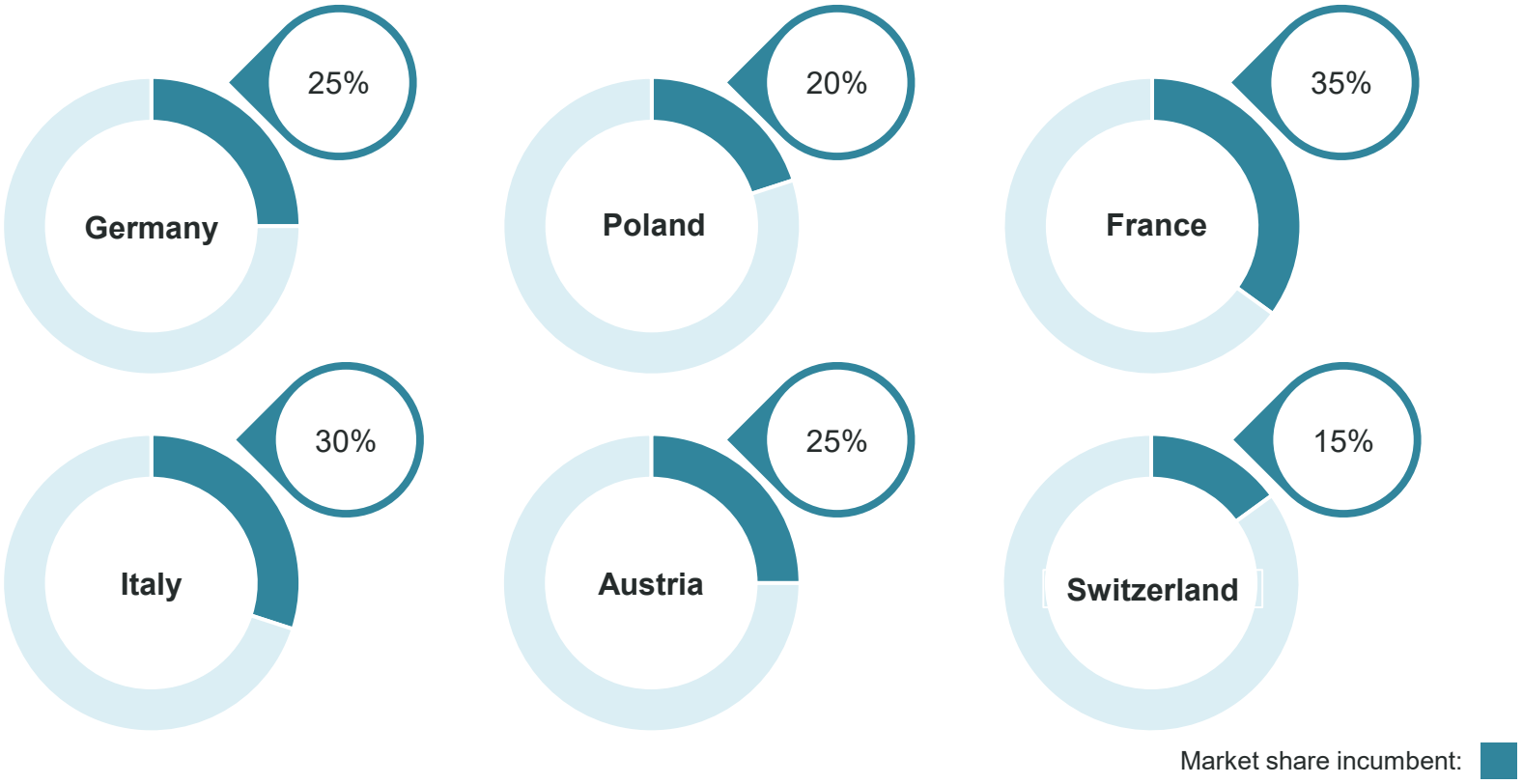


- Combined Transport integrates a host of different and specialised service providers:
  - **Shippers** own the goods to be transported and supply the freight to the (internal) **clients**.
  - **Freight forwarders and logistics service providers** organise the transport from origin to destination.
  - **CT operators** organise the intermodal transport chain from terminal to terminal or origin to destination.
  - **Terminal operators** organise transhipment between road, rail and IWW.
  - **Carriers** provide the transport of goods by road, rail or IWW.
  - **Asset owners** provide rolling stock and loading units for transport services.
- While some CT stakeholders have a concentrated business, others assume **several roles along the value chain at the same time**.

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Combined Transport is more competitive than other rail freight segments, such as single-wagon load or bulk block trains

Incumbent share for CT rail transport in 2024 for selected countries
(% of tkm)



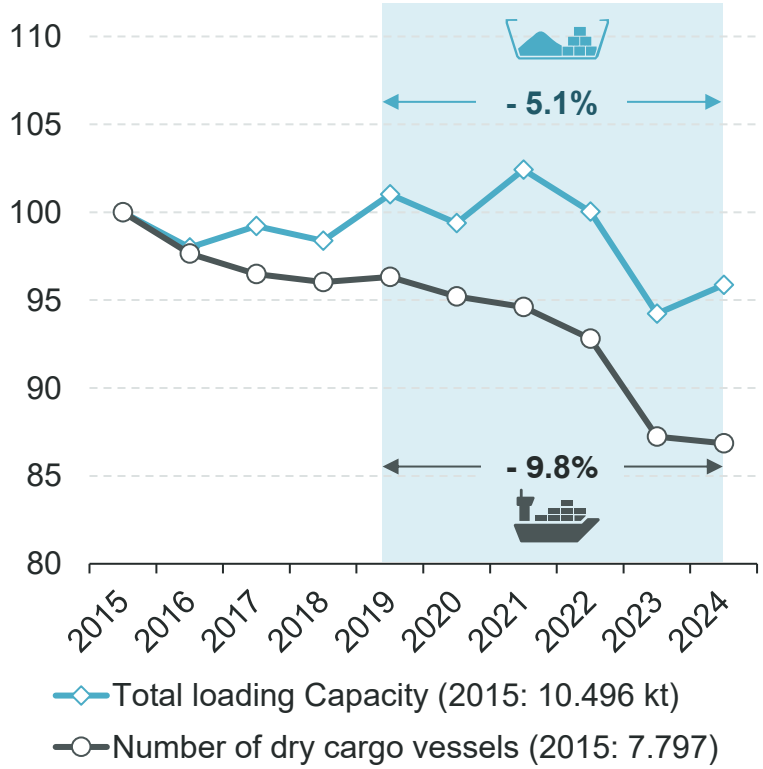
Source: National regulation bodies; SCI Multiclient Study “The European Intermodal Rail Freight Transport Market 2026”

- European **incumbent railway undertakings have lost significant market shares for Combined Transport since the liberalisation of rail infrastructure access**. The CT share in their home markets is usually lower than the total market share for incumbents. Based on the current market outlook, this development is likely to continue.
- Outside their home markets, many incumbents successfully compete with subsidiaries in the CT segment. But fully private competitors are increasingly successful as well. **The top 5 private companies have a market share of almost 20% of the European CT market.** The biggest private operator is Metrans.
- In France, the local incumbent SNCF Fret had to give up all CT operations in 2025 after a deal with the EU Commission. However, due to traction services for other operators and the CT activities of other subsidiaries, holding company **Rail Logistics Europe (RLE) still has about 35% CT market share in France**. Nevertheless, RLE is currently looking for a minority investor.

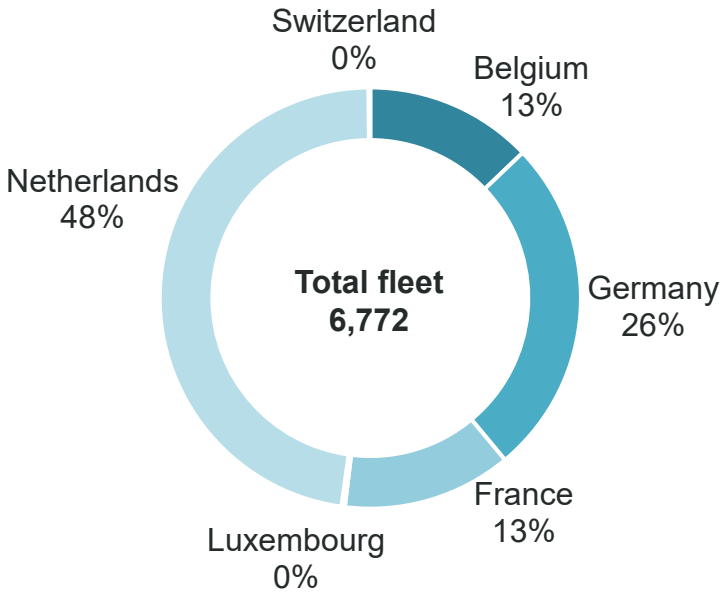
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Optimised barges for low draught and high loading capacity increasingly reach physical limits imposed by locks, bridges and port infrastructure

Number of dry cargo vessels and total loading capacity[1] (Index: 2015 = 100)



Dry cargo vessels in Rhine countries in 2024[1] (%)



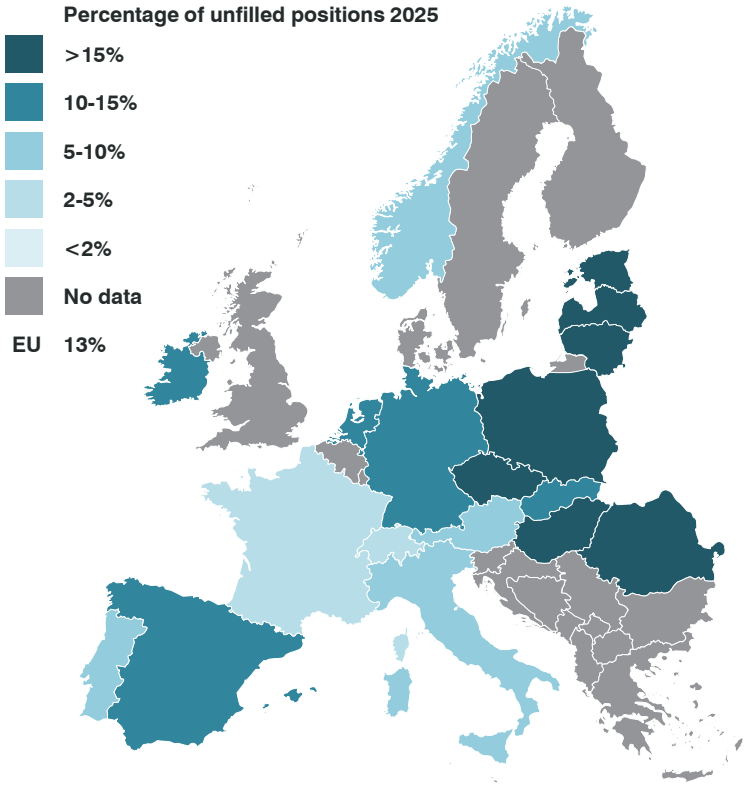
- The dry-cargo vessel fleet is decreasing in all six Rhine countries (i.e. countries with access to the Rhine/Schelde/Moselle fluvial system). The total-fleet loading capacity has also decreased since 2015 but at a slower pace. Therefore, **the average deadweight of dry cargo vessels is rising**, from 1,346 metric tonnes in 2015 to 1,485 metric tonnes in 2024 (+10%). Container barges account for 20-25% of total loading capacity.
- At the same time, **vessels are increasingly designed to withstand low-water periods by reducing draught**. The shallower build is compensated by greater width and length, optimised hull geometry and lightweight construction.
- However, low-water optimisation shifts constraints from water depth to horizontal infrastructure: Vessel width and length cannot increase indefinitely, as locks, bridges, ports and fairways impose **physical limits**.

Sources: CCNR 1) For Germany: 2023 data.

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Extending the continental Combined Transport network helps European trucking companies tackle the rapidly increasing driver shortage

Estimated lorry driver shortage by country
(% of unfilled lorry driver positions, 2025)



To move 80 TEU you need…

1 train driver



40 lorry drivers



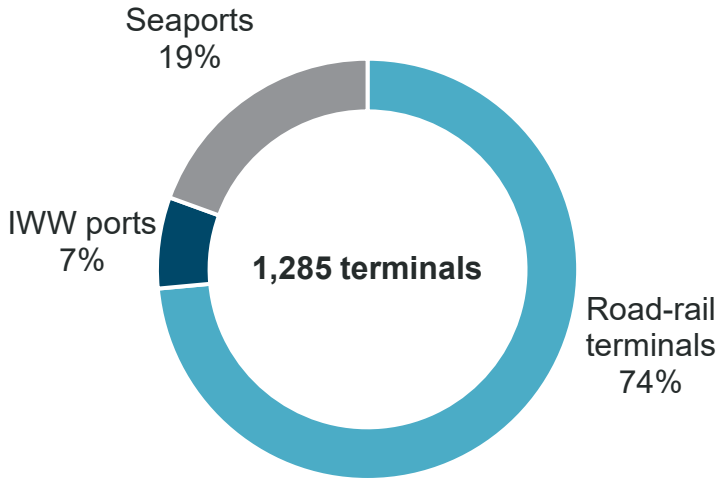
- According to the International Road Transport Union (IRU), 502,000 positions for lorry drivers remained unfilled in Europe in 2025, representing 13% of driver jobs. This is **almost double the number of unfilled driver positions in 2023**. Especially in Eastern Europe, the gap between demand and supply is growing quickly. Important road freight markets, like Germany, Spain and the Netherlands, are also suffering from supply shortages, resulting in a high number of unfilled driver positions.
- The situation is unlikely to change as **one third of European lorry drivers are older than 55** and expected to retire in the next ten years, while less than 5% are under 25.
- **A further expansion of the continental Combined Transport network facilitates the shift to rail for longer distances**, allowing trucking companies to concentrate on short-distance transports with lower driver demand.

Source: IRU Annual Driver Shortage survey 2025

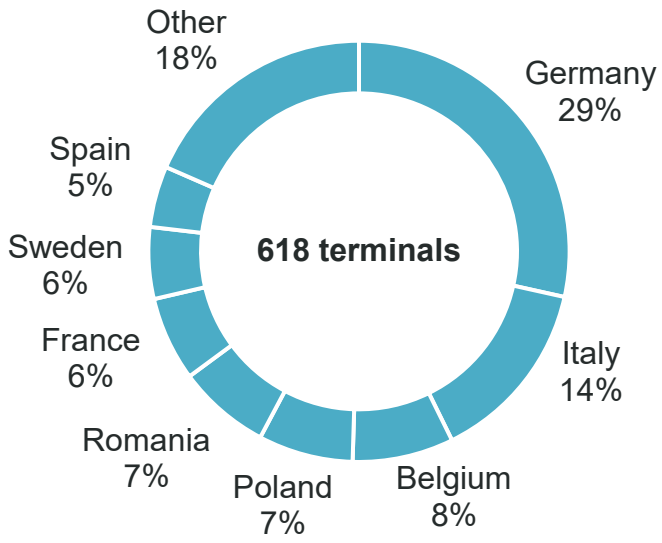
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The exact number of Combined Transport terminals across Europe remains unknown

Multimodal terminals in the EU by type according to the EU (% of total number of terminals; 2022)



Road–rail terminals by country according to IMs
(% of total number of terminals; 2024)

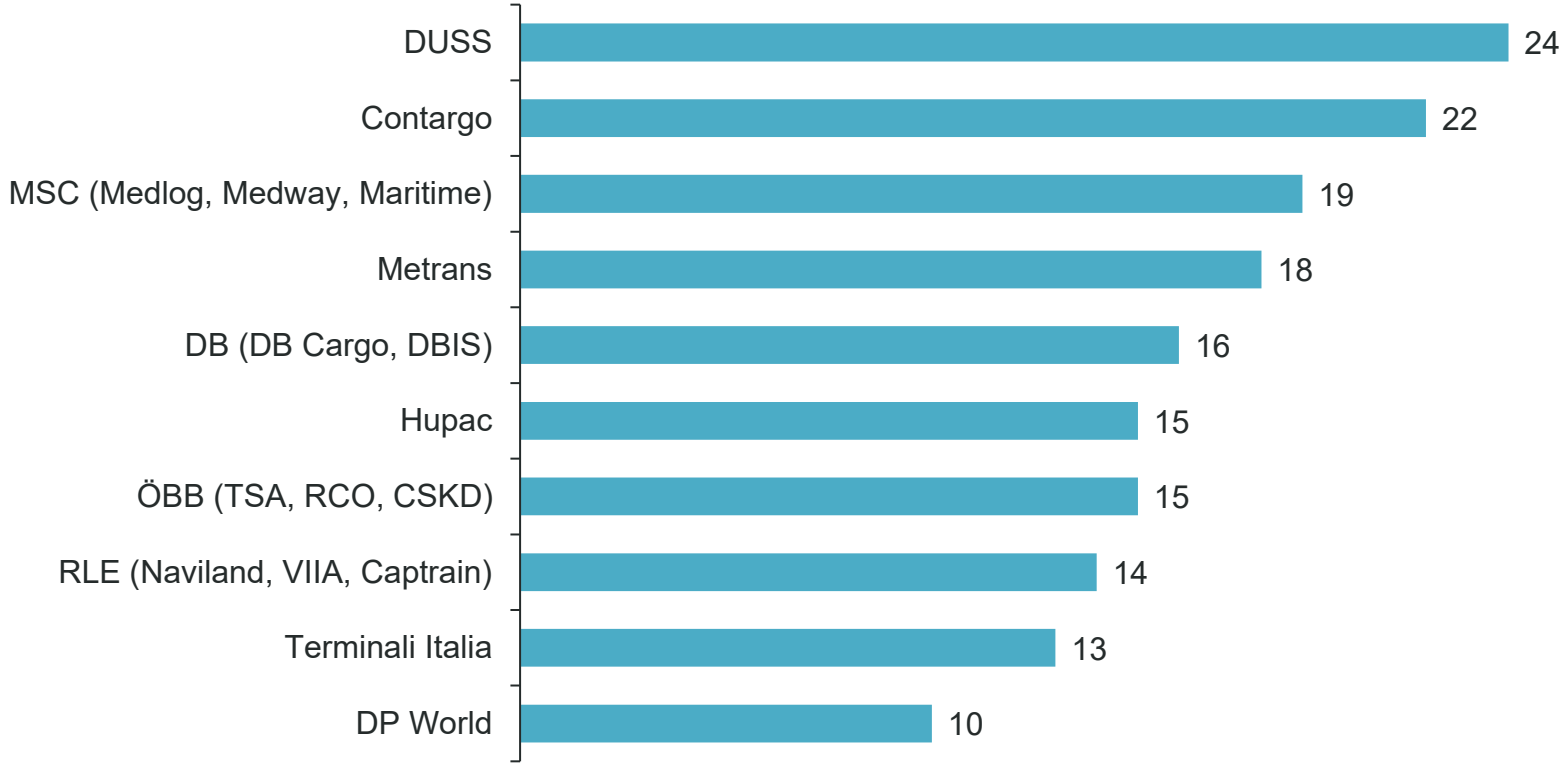


- While the TEN-T regulation obligates all Member States to conduct market and prospective analysis on multimodal freight terminals by July 2027, **there is no established and widely-accepted number** on these terminals so far. While a study for the EU from 2022 identified 945 road–rail terminals in the EU alone, the infrastructure managers' association IRG-rail only reported 618 terminals of this type for all of Europe in 2024.
- The CT Directive itself references "suitable loading and unloading stations" in the context of defining Combined Transport. Therefore, **the identification of CT terminals remains ambiguous**, as some freight terminals might theoretically be equipped for loading and unloading intermodal units but are never used for this purpose.

Source: EU study "Assess the modal shift potential to intermodal and multimodal transport in EU"; IRG-rail 14th Annual Market Monitoring Report 2026

The European Combined Transport terminal landscape is diversified, with many small local operators

Terminals operated by selected hinterland CT terminal operators
(Number of terminals; majority of shares or equal partnership between shareholders only)



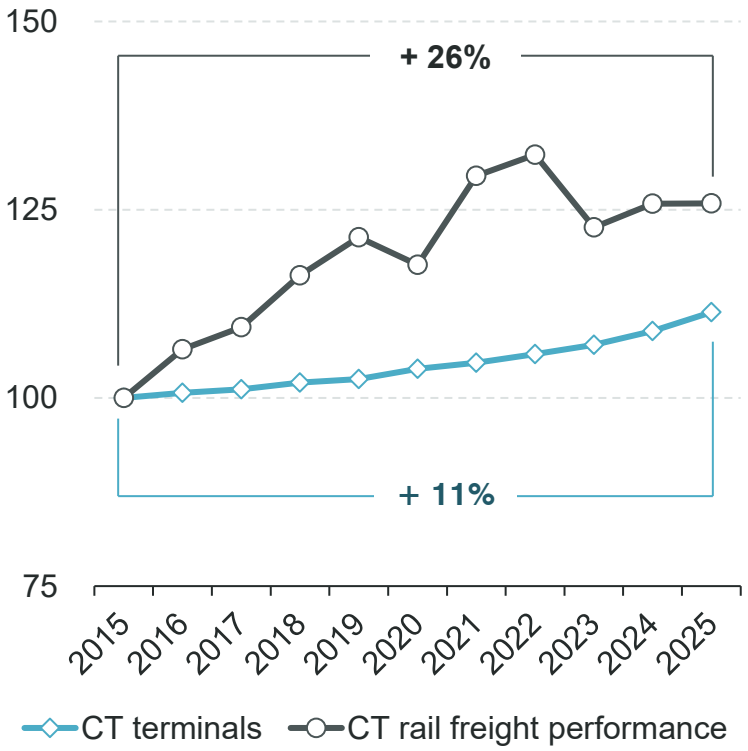
Source: SCI Multiclient Study “The European Intermodal Rail Freight Market 2026”; Companies’ websites

- The hinterland Combined Transport terminal landscape in Europe is built around big terminals in Central Europe, which often function as hubs for intermodal networks. Smaller terminals in between and at the periphery of Europe have feeder functions for these networks. CT terminal operations represent **a very fragmented business,** with many terminals operated independently.
- **DUSS** is the biggest CT terminal operator with 24 terminal locations currently in operation in Germany. This represents less than 2% of all 1,285 multimodal terminals identified by the EU. It is followed by **Contargo** with 22 trimodal terminal locations concentrated along the Rhine valley and in Northern France, offering access to rail and IWW CT networks.
- **MSC** expanded its hinterland terminal network in recent years through its subsidiaries Medlog and Maritime Transport, especially on the Iberian peninsula and in the United Kingdom, overtaking **Metrans** in both number of terminals and handling capacity.

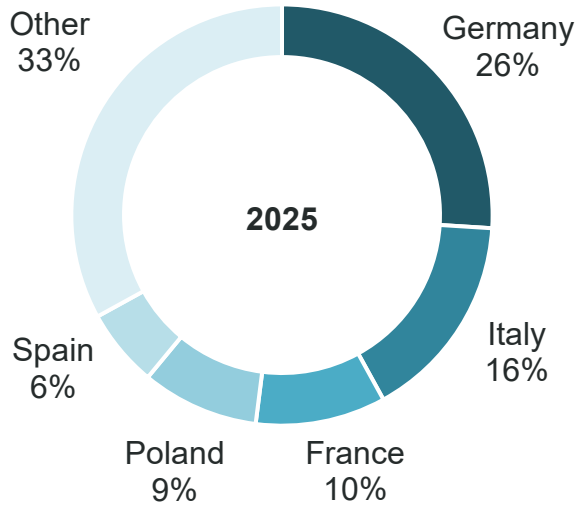
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Terminal infrastructure expansion lags behind the growth in transport performance

Development of terminal infrastructure and CT rail freight in Europe (Index: 2015 = 100)



Terminal capacity in Europe
(% of total annual transhipment capacity)



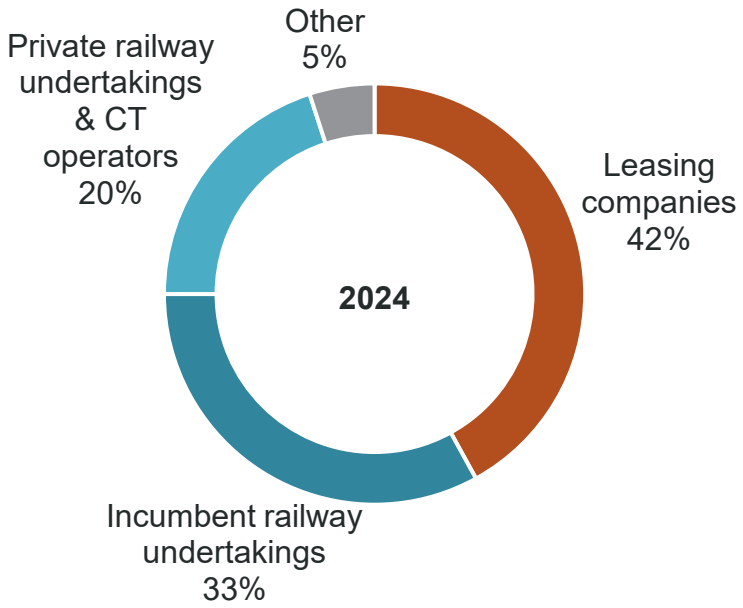
- While **the number of CT terminals in Europe increased by +11% between 2015 and 2025**, the CT market grew by +26% during the same time. This led to capacity restrictions during the peak years of 2021/22. Since then, however, terminal infrastructure growth has outperformed the transport market, slowly closing the gap.
- While Germany is responsible for over 35% of the European CT rail freight market, it represents 26% of terminal capacity. **This reflects both the high productivity of German terminals as well as the need for more terminal capacity**, especially in logistics nodes like Hamburg, Munich or Stuttgart.
- At the same time, Italy, Poland and Spain offer more transhipment capacity than their share in CT transport performance would suggest. While this partially reflects logistics networks concentrated on hubs near borders, leading to comparatively low domestic transport performance within these countries, it is also indicative of **capacity for further growth**.

Source: SCI Verkehr Database

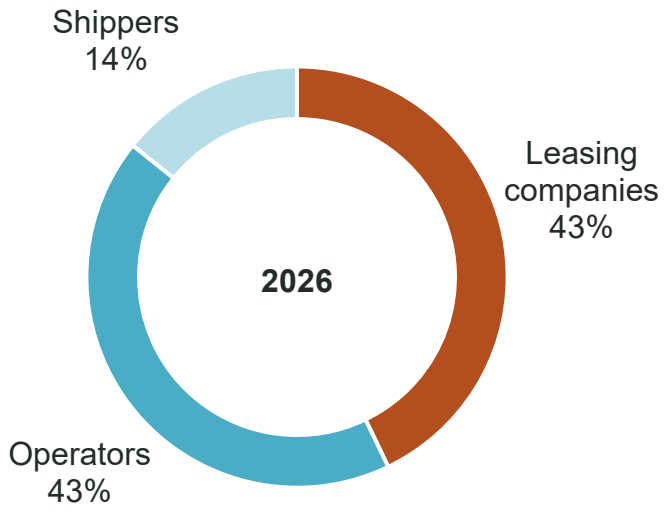
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Leasing companies further increase their market share in the supply of Combined Transport assets

European intermodal wagon fleet by type of owner (% of wagons)



Tank container fleet by type of owner
(% of global tank container fleet)



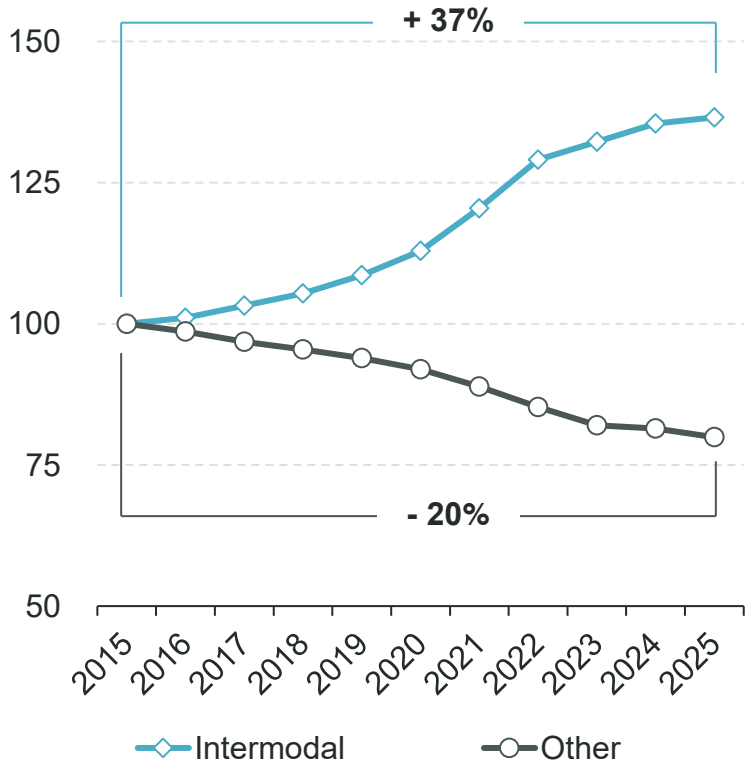
- The strong push Combined Transport received before the current crisis led to an increased interest of investors in the business. While railway undertakings still hold over 50% of the overall fleet of intermodal wagons, **leasing companies already own more intermodal wagons than all incumbents in Europe combined**.
- **The share of leasing companies is expected to further increase.** This will be driven by leasing companies continuing to expand their fleets, while incumbents, CT operators and private railway operators increasingly rely on leasing options to expand their operations or consolidate their fleets.
- The growing importance of leasing companies is similar to that of other assets required for Combined Transport, such as intermodal units, as **around two-fifths of the global tank container fleet are owned by leasing companies**.

Source: SCI Multiclient Study “Freight Wagons – Global Market Trends 2026”; ITCO Global Tank Container Fleet Survey 2026

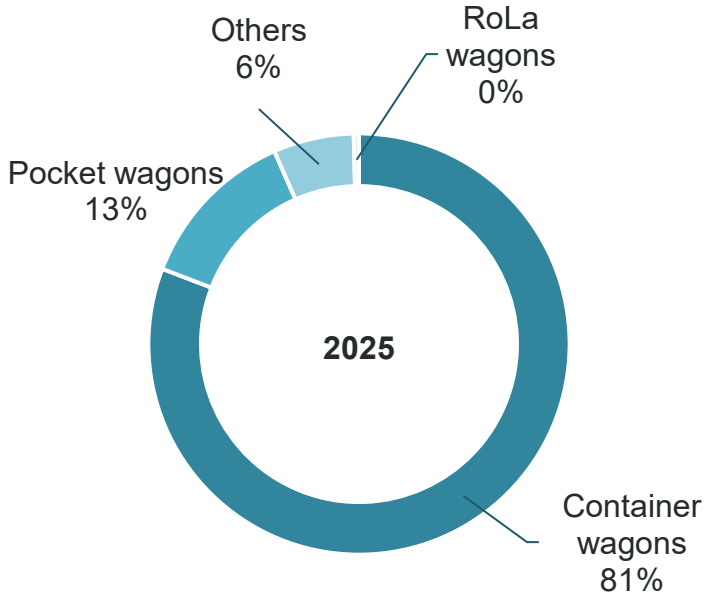
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Combined Transport benefits from a modern wagon fleet that has grown significantly in recent years

Development of European intermodal and other freight wagon fleet (Index: 2015 = 100)



European intermodal freight wagon fleet by type of wagon (% of wagons)



- Between 2015 and 2025, **the intermodal wagon fleet in Europe grew by 37%**, while the fleet of other wagon types shrank by 20%. Most of this growth happened in the period between 2019 and 2023. As a result, Combined Transport is well-supplied with a modern fleet able to cope with growing demand.
- Within the intermodal wagon fleet, **80% of all wagons are fit for the transport of maritime containers** and swap bodies, reflecting the higher share of this segment within the CT market.
- Most of the remaining fleet are pocket wagons for the transport of semi-trailers for the continental CT market (which can also be used for the transport of containers and swap bodies). **RoLa wagons represent only 0.4% of the wagon fleet,** due to the small role of these segments in the overall market. Other wagon types, such as modular wagons and wagons for horizontal transhipment have a share of about 6% of the fleet.

Source: SCI Multiclient Study “Freight Wagons – Global Market Trends 2025”

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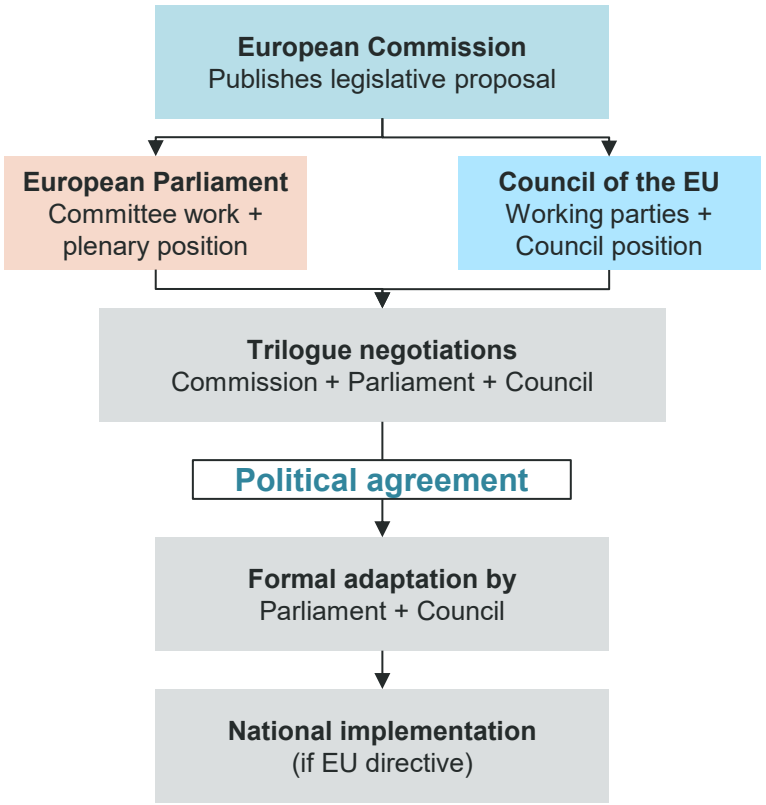
General framework and key elements of Combined Transport in Europe

07

Legislative framework

The EU legal framework for Combined Transport is governed through the EU's Ordinary Legislative Procedure

Legislative process of the European Union



Relevant EU railway packages[1]

2001 First railway package

- Enabled non-discriminatory access to the trans-European network for railway undertakings.

2004 Second railway package

- Improved safety, interoperability and the opening of the rail freight market.
- Establishment of the European Railway Agency (ERA).

2016 Fourth railway package

- Vehicle authorisations and safety certificates, valid throughout the EU.
- Interoperability of the European Rail Traffic Management System (ERTMS).

- **The EU has a multipolar legislative process.** The European Commission proposes legislation, after which the European Parliament and the Council of the EU act as co-legislators and develop their respective positions. Once both institutions have mandates, they often negotiate a compromise in informal trilogues, with the Commission participating as facilitator and technical adviser.
- Once Parliament and Council agree on the same text, they both formally adopt it, and it is published in the Official Journal of the EU. **A Regulation applies directly in Member States, whereas a Directive normally has to be transposed into national law** within a defined deadline.
- The **EU railway packages**, a series of legislative reforms adopted since the early 2000s to create a more integrated and competitive European rail market, form part of the legislative process. They are the backbone of the legal framework for railway and CT within the EU.

Source: European Commission 1) The third railway package from 2007 mostly concerned passenger services.

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30+ policy and regulation packages will shape the future of Combined Transport at 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

The EU Commission's 2023 proposal for a new Combined Transport Directive is still on the table – the proposal includes a new definition of Combined Transport

Proposed definition by the European Commission

"A combined transport operation shall meet the following conditions:

a) except for operations referred to in point b), **the operation produces at least 40% less external costs than the alternative unimodal road transport operation**;
b) in the case of connections between an island and the mainland without a road alternative, the operation produces at least 40% less external costs than the alternative maritime intermodal operation;
c) the intermodal loading unit in unaccompanied transport has a unique reference in accordance with the identification and marking regime established pursuant to the up-to-date versions of international standards ISO 6346 or EN 13044."

Recommendations by the sector to ensure the smooth implementation of a new definition

Cost-awareness: The cost of the burden of proof is kept as low as possible.

Cleverness: Calculation alternatives that offer similar results and are easy to implement, such as a distance-based approach, are considered.

Continuity: The new definition does not exclude parts of the intermodal transport chain currently defined as Combined Transport.

Clarity: The end result does not add further complexity to the identification of Combined Transport connections.

- The **Combined Transport Directive** defines which transport chains are considered to be Combined Transport. The CT definition is relevant for support measures granted like tax rebates and higher gross vehicle weights on the road leg.
- The revision of the Combined Transport Directive has had a **long and difficult political path**: an earlier 2017 revision attempt ultimately failed, after which the Commission relaunched the file in November 2023 with a new proposal focused on support for intermodal transport and external-cost savings. As of October 2026, the Commission's 2023 proposal is still on the table; it has not been withdrawn or replaced by a new legislative text.
- Following the new definition of CT in the proposal, a calculation needs to be performed for each consignment to decide whether it qualifies as CT or not. This would be made possible by setting up **digital exchange platforms,** as prescribed by the eFTI Regulation.

Sources: Revision Council Directive 92/106/EEC; UIC & UIRR

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While the Weight and Dimensions Directive directly affects the competitiveness of Combined Transport, the Military Mobility Package could improve the resilience of the system

Revision of the **Weight and Dimensions Directive 96/53/EC**

Why does it matter for Combined Transport?

The Weight and Dimensions Directive pursues a dual objective: improving the efficiency of road transport while also creating incentives for the development and uptake of intermodal freight transport.

Key points affecting Combined Transport

- **Protection of technical interoperability between road and rail:** Trailer and loading unit dimensions should remain compatible with all types of wagons, terminal equipment and rail loading gauges.
- **Preservation of the role of 44 t as an enabler of combined transport:** A harmonised 44 t regime for CT road legs can remove operational barriers, particularly for heavy containers, semi-trailers and tank containers. Extending the same productivity benefit broadly to conventional road transport changes the relative economics between the modes.
- **Support of zero-emission trucks without creating unintended modal incentives:** Additional weight and length are justified where needed to compensate batteries or other zero-emission technology. This bonus shall not create additional payload capacity.

Adoption of the **Military Mobility Package**

Why does it matter for Combined Transport?

The Military Mobility Package has a high impact on certain corridors and terminals, especially ports, border-crossing corridors and in Eastern Europe. The Package is potentially a major infrastructure and resilience driver in the coming years.

Key points affecting Combined Transport

- **Dual-use investment can unlock freight infrastructure upgrades:** The package identifies around 500 infrastructure “hotspot” projects along four priority military-mobility corridors. Many of these investments will also benefit commercial rail freight and Combined Transport.
- **Terminals and ports become part of resilience policy:** Intermodal nodes are increasingly viewed as strategic infrastructure, not merely commercial facilities.
- **Harmonised permits and digital procedures can produce civilian spillovers:** The proposed regulation aims to simplify cross-border authorisations and logistics processes.

Sources: EU Procedure 2023/0265/COD; Action plan on military mobility 2.0

Thanks to the eFTI Regulation and Telematics TSI, digitalisation is shifting from proprietary interfaces toward standardised and regulated interoperability

Implementation of the **eFTI Regulation 2020/1056**

Why does it matter for Combined Transport?

The main benefit of the eFTI Regulation is "enter once, use many times": regulatory freight information can be held in structured electronic form and accessed by authorities through certified platforms.

Key points affecting Combined Transport

- **Particularly valuable for CT because one shipment crosses several modes and authorities:** A road–rail–road transport chain currently generates duplicate paperwork and data interfaces. Business cases must be clearly defined.
- **Authorities become obliged to accept compliant electronic information:** This will reduce paperwork and multiple manually compiled reports of the same data to different government bodies. Full application is scheduled for 9 July 2027.
- **The business case(s) depend on interoperability with rail and terminal systems:** The major opportunity for stakeholders in the Combined Transport sector is avoiding parallel eFTI, rail and terminal data silos.

Implementation of the **Telematics TSI 2026/253**

Why does it matter for Combined Transport?

The Telematics TSI will be the core digital policy for rail-based CT. It can improve reliability, ETA quality, terminal planning and integration between the rail leg and the wider multimodal chain.

Key points affecting Combined Transport

- **This is the new data backbone for rail**. The Telematics TSI (TEL TSI) replaces the former Telematics Applications for Freight TSI (TAF TSI) and introduces common requirements for interoperable rail-data sharing. It covers capacity/traffic management, train preparation, wagon status, ETA information and freight reference data.
- **Intermodal Loading Units (ILUs) are explicitly recognised, but the job is not finished:** Data sharing for the movement of intermodal loading units remains an open point, while reference data for ILUs has already been considered.
- **The key implementation risk is fragmentation:** If railway undertakings, infrastructure managers, terminals and logistics platforms implement standards differently or maintain parallel proprietary interfaces, much of the potential benefit is lost.

Sources: Regulation (EU) 2020/1056 ("eFTI Regulation"); Commission Implementing Regulation (EU) 2026/253 ("TEL TSI")

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The revised TEN-T Regulation and the Rail Capacity Regulation move terminals into the centre of EU transport policy

Implementation of the **TEN-T Regulation 2024/1679**

Why does it matter for Combined Transport?

The revised TEN-T Regulation is probably the most important EU framework for long-term terminal capacity, network standards, operational KPIs and corridor development.

Key points affecting Combined Transport

- **CT terminals are now explicitly part of TEN-T infrastructure planning with clearly defined KPIs:** Terminal capacity becomes a policy obligation, not only a market issue. Member States must assess existing multimodal freight terminals, future demand and capacity needs. The objective is sufficient and geographically adequate transhipment capacity.
- **The Regulation links corridors and terminals:** Investment in mainlines without adequate nodes will no longer be sufficient for TEN-T compliance. Also, projects demonstrably required to close TEN-T terminal or corridor gaps gain a stronger policy rationale for CEF/national funding.
- **Terminal quality requirements increase:** TEN-T terminals should provide multimodal connectivity, digital tools, alternative-fuel infrastructure and adequate capacity.

Implementation of the **Rail Capacity Regulation 2026/1184**

Why does it matter for Combined Transport?

The Rail Capacity Regulation is potentially one of the largest improvements to international rail freight quality if multi-network capacity and terminal coordination work in practice.

Key points affecting Combined Transport

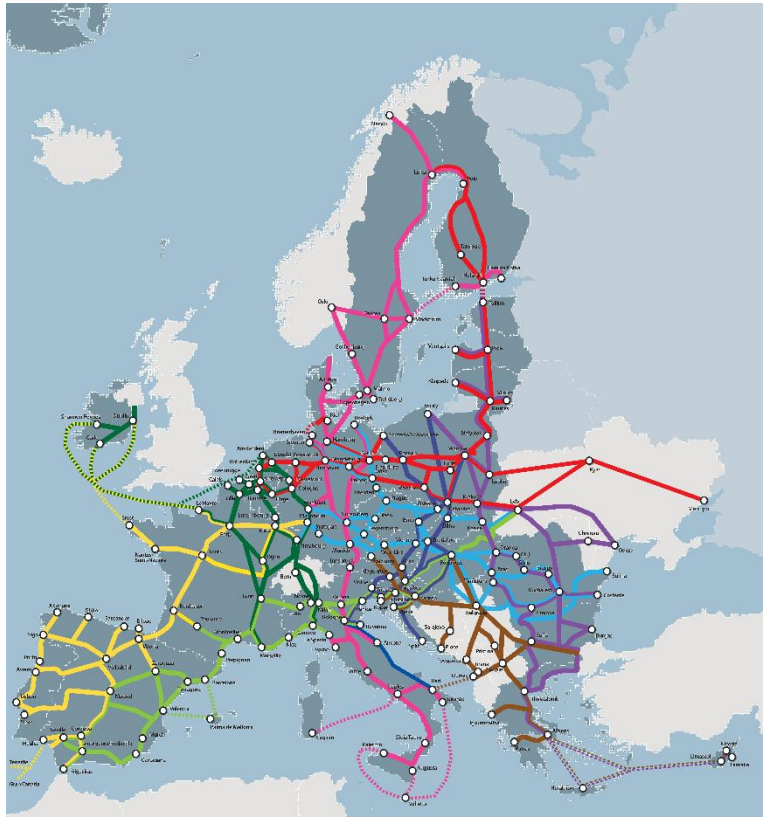
- **Cross-border freight should be able to request one coherent multi-network capacity right:** Capacity planning becomes more European, multiannual and coordinated. Applicants receive a single point of contact and minimum quality requirements for routing, timing and availability.
- **Terminals become integrated into capacity allocation:** Infrastructure managers and TEN-T service facilities must coordinate rail path and terminal capacity allocation. Applicants will ultimately be able to request both through one-stop shops, resulting in harmonised train paths and terminal slots.
- **Implementation quality will determine success:** The Regulation provides the framework; the practical benefit depends on harmonised digital tools, procedures agreed upon by the European Network of Infrastructure Managers (ENIM) and the behaviour of national infrastructure managers endorsed by the European Railway Platform (ERP).

Sources: Regulation (EU) 2024/1679 (“TEN-T Regulation”); Regulation (EU) 2026/1184 (“Rail Capacity Regulation”)

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The TEN-T corridor network provides the backbone for cross-border Combined Transport in Europe

Map of the revised core TEN-T network



Source: Directorate-General for Mobility and Transport, European Commission

Rail KPIs for the TEN-T network

- **ERTMS deployment**
- **Track gauge 1,435 mm**
- **Electrification**
- **Intermodal gauge P/C 400**
- **Line speed ≥100 km/h**
- **Axle load ≥22.5 t**
- **Train length ≥740 m**

- The revised TEN-T Regulation defines common infrastructure standards across the European transport network. **The core network is to be completed by 2030**, the extended core network by 2040 and the comprehensive network by 2050.
- Combined Transport will specifically profit from the adaption of infrastructure, which allows for the **transport of intermodal units with a height of up to 400 cm**. Additional measures, including a line speed of at least 100 km/h, axle loads of 22.5 t and train lengths of 740 m, will improve the productivity and competitiveness of CT.
- The **European Rail Traffic Management System (ERTMS)** will become the single signalling system across the entire TEN-T network, while national systems will be progressively phased out.
- By assuring the deployment of standard gauge, **cross-border CT with Spain or the Baltic countries** will be facilitated in the future.

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08 Technological framework

Technological developments, standards and global initiatives shape the future of Combined Transport

Technological developments

The next productivity step for Combined Transport comes from connecting decarbonisation, automation and interoperability across the entire transport chain.

- **Electrification** decarbonises the transport chain.
- **Automation** reduces process costs and labour intensity.
- **Digital Automated Coupling (DAC)** enables the automation and digitalisation of CT and other freight trains.
- **ERTMS** enables interoperable and automated operation across the European rail network.
- **Horizontal transhipment technologies** enable interoperability with non-craneable semi-trailers.

Standards

Technical Specifications for Interoperability, UIC International Railway Solutions and European Norms harmonise technical requirements across Europe.

- **Technical Specifications for Interoperability** (TSI)
  - Provided by European Railway Agency (ERA) and the European Commission (EC)
- **UIC International Railway Solutions** (UIC-IRS)
  - Provided by UIC
- **European Norms** (EN)
  - Provided by the European Committee for Standardisation (CEN)

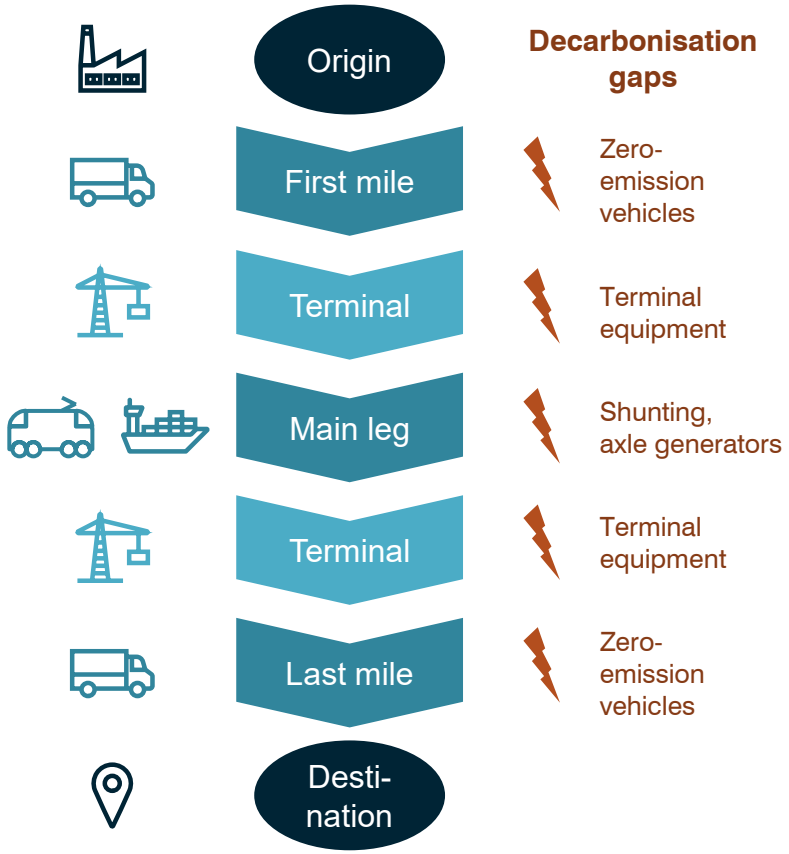
Global initiatives

Global initiatives provide frameworks for safe and legally sound transcontinental multimodal transport chains.

- IMO/ILO/UNECE **Code of Practice for Packing of Cargo Transport Units** (CTU Code):
  - Common safety framework for packing, securing and handling containers and swap-bodies
- **United Nations Commission on International Trade Law** (UNCITRAL):
  - Accra Convention on Negotiable Cargo Documents, Model Law on Electronic Transferable Records, Rotterdam Rules, Model Law on Electronic Transferable Records

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Electrification of door-to-door CT chains: The next decarbonisation step is closing the gaps in the transport chain



Source: SCI Verkehr

What needs to change for a fully electrified CT chain

- **Mainline rail is already decarbonised:** The remaining decarbonisation gaps sit mostly in first/last mile, shunting and terminal equipment.
- **First/last mile becomes an energy management task:** Truck charging has to be coordinated with driver schedules, terminal slots and dwelling times.
- **Terminals become energy nodes:** Grid connections have to serve e-trucks, cranes, terminal tractors, buildings and potentially battery-buffer systems.
- **Non-electrified railways remain a weak link:** Battery or hybrid shunting can bridge gaps where full catenary electrification is not economically feasible.
- **The business case is utilisation-sensitive:** Predictable shuttle patterns and high vehicle utilisation favour battery-electric first/last mile fleets.

Decision points for CT operators and policy makers

- **Grid first, vehicles second:** Terminal electrification is constrained more by grid lead times rather than equipment availability.
- **Plan charging around operations:** Charging concepts should make smart use of existing waiting and handling times to avoid additional dwelling times. They should also take into account train operations such as temperature control for reefer containers.
- **Avoid isolated investments:** Asset cycles of truck, terminal and rail electrification need to be aligned for infrastructure planning.
- **Prioritise the remaining diesel hotspots:** Shunting, terminal tractors and heavy handling equipment offer decarbonisation opportunities.
- **Measure door-to-door performance:** A low-emission rail leg does not make the full CT chain zero-emission if terminal and road legs remain fossil-based.

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Automation of transport: The largest productivity gains come from automation across modes

Rail

- **Near-term use cases:** ATO support, remote control, automated shunting, automated train preparation
- **Productivity potential:** Less manual work in yards, more consistent operational processes
- **Enablers:** DAC, ERTMS/ATO, digital train integrity, standardised operational data
- **Main barriers:** Mixed traffic, safety approval, national operating rules, migration across fleets of legacy assets

Inland waterways

- **Near-term use cases:** Assisted navigation, remote monitoring, remote control, smart traffic management (e.g. in locks)
- **Productivity potential:** More efficient crew deployment, more predictable vessel operations
- **Enablers:** RIS/data exchange, remote-control centres, harmonised navigation standards
- **Main barriers:** Waterway-specific conditions, crew requirements, liability, heterogeneous vessel fleet

Road

- **Near-term use cases:** Automated terminal shuttles, controlled hub-to-hub corridors, geofenced logistics sites
- **Productivity potential:** Better asset utilisation, lower dependency on scarce driver capacity
- **Enablers:** CCAM regulation, digital infrastructure, high-quality maps, remote supervision
- **Main barriers:** Liability, mixed traffic, cross-border rules, handover between automated and conventional operations

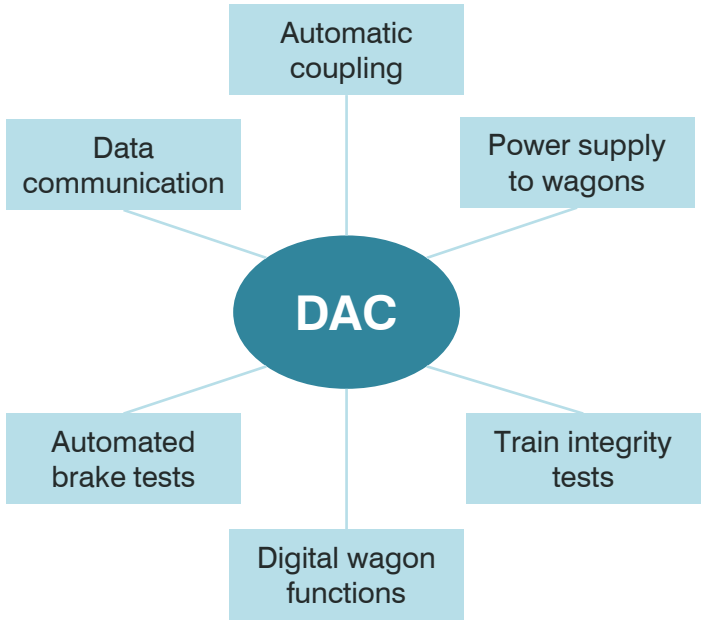
Terminals as automated cross-modal interfaces: Where automation creates the system value

Arrival of automated truck → automated gate → automated handling → automated train/barge preparation → digital handover to next mode

Source: SCI Verkehr

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Digital Automatic Coupling: DAC might be a physical and digital backbone for automated rail freight, but migration economics matter as much as the technology



DAC combines the mechanical coupling with pneumatic, electrical and data connections. Its strategic value is therefore not the coupler itself, but the processes it enables for train operation, monitoring and automation.

Source: SCI Verkehr

Potential impacts on Combined Transport

- Faster and more automated train preparation
- Automated brake tests and train integrity functions
- Continuous wagon power and data for monitoring
- Better basis for digital wagon and load information
- Potentially shorter terminal and marshalling yard turnaround times

The migration challenge

- **Network effect:** DAC creates its full value only when a critical share of wagons and locomotives is equipped.
- **Fleet conversion:** Large retrofit volumes require workshop capacity, financing and stable technical specifications.
- **Mixed operation:** Transition management must ensure compatibility between already DAC-compatible vehicles and the remaining conventional fleet.
- **Coordination:** Benefits depend on synchronised deployment across all Member States, asset owners and operators.

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ERTMS: An interoperability and productivity programme for railway with long-term benefits for CT, but entailing migration costs today

Today: Multi-system locomotives



Onboard units for various **national signalling systems**

- High equipment complexity
- Country-specific approvals
- Friction at border-crossings

Target: One interoperable signalling system



ETCS
FRMCS
ATO-ready

- Standardised equipment
- Seamless border-crossings
- Platform for later automation

Why ERTMS matters for CT

- **Cross-border interoperability:** Fewer national technical barriers and less need for multiple legacy signalling systems on locomotives.
- **Network effect:** Benefits are highest on international freight corridors where interoperable operations matter most.
- **Capacity and automation:** ERTMS provides the signalling basis for more advanced traffic management and future ATO applications.
- **Fleet economics:** Simpler onboard architecture can reduce complexity once legacy systems are phased out.

The transition problem

- **Synchronisation of trackside and onboard deployment:** Asset owners carry the cost if vehicles are equipped long before ERTMS is rolled out along corridors.
- **Phase out of national systems:** Need for dual equipment erodes the expected simplification benefit.
- **Stabilisation of specifications:** Software and version changes increase engineering, approval and fleet-management complexity.
- **Funding of retrofits and industrial capacity:** Large locomotive fleets need financing, engineering slots and workshop capacity without excessive vehicle downtime.

Source: SCI Verkehr

Horizontal transhipment technologies: Systems for non-craneable semi-trailer facilitate access to Combined Transport (1/2)

CargoBeamer

CargoBeamer technology employs specialised Sdkmss pocket wagons to transport non-craneable semi-trailers. The system relies on unique wagons and terminals to facilitate efficient Combined Transport.

CargoBeamer's Baskets enable the horizontal loading and unloading of semi-trailers using horizontal transhipment in automated terminals and vertical transhipment in conventional terminals. In Calais, an automated terminal is operative, with two more currently in construction.

CargoBeamer requires specialised terminals for the full automation of loading and unloading processes. While the system is compatible with existing terminals, it is less competitive compared to fully automated set-ups.

CargoBeamer operates on routes between and within Germany, Italy and France. The system is approved for use in Germany, Switzerland, Italy and France.

Lohr

Lohr UIC 1-3 wagons are used for transporting non-craneable semi-trailers, with a low loading height that accommodates trailers up to four metres tall.

Lohr wagons allows for efficient loading and unloading of a full train of 32 semi-trailers in approximately 256 minutes, or about 4 minutes per trailer.

Lohr wagons require specialised terminals with hydraulic floor systems.

Lohr wagons are mainly operated in France, but they are also used for cross-border connections, e.g. France–Luxembourg or Luxembourg–Poland.

MegaSwing

MegaSwing wagons allow for the transport of semi-trailers without cranes. They feature a swivelling pocket for loading and unloading.

MegaSwing wagons allow for loading by swivelling the trailer pocket to the side, eliminating the need for cranes and reducing handling complexity.

MegaSwing wagons integrate into existing rail infrastructure. They operate without requiring specialised facilities, needing only accessible track sides and a 15-metre-wide tarmac strip along the track.

MegaSwing wagons were operated by Helrom between Germany, Austria and Hungary before Helrom's bankruptcy in 2026.

Sources: Companies' websites

Horizontal transhipment technologies: Systems for non-craneable semi-trailer facilitate access to Combined Transport (2/2)

NIK (formerly NiKRASA)

NIK technology utilises standard pocket wagons with an additional module that allows for the vertical handling of semi-trailers. Currently, TX Logistik operates and maintains around 200 units.

NIK features vertical handling technology attached to a horizontally accessible platform for semi-trailers with a loading and unloading time of just 3 minutes per unit.

NIK can be implemented at standard terminals with minimal modification, as it does not require special adaptations to terminals, trailers or wagons.

NIK is operational on several routes managed by TX Logistik. In September 2026, TX Logistik ordered 50 more units for new connections.

R2L

The R2L system features a fully galvanised platform that allows non-craneable semi-trailers to be lifted vertically into and out of double-pocket wagons.

The R2L Connector enables the direct loading of non-craneable semi-trailers onto rail wagons by cranes or reach stackers. The loading operation is completed in just a few minutes, supported by laser measurement technology for precision.

R2L technology requires no specialised terminals to handle the R2L Connector system. It eliminates the need for ramps and other loading infrastructure.

Relatively broad commercial deployment across Europe, particularly in automotive logistics and selected regular CT services.

Sdggmrss with integrated basket system

The Sdggmrss wagon with integrated basket system was built to transport non-craneable semi-trailers, ISO containers and swap bodies. It supports up to 40 tonnes per trailer.

Loading of non-craneable semi-trailers is performed vertically with the help of the integrated basket. The Sdggmrss further simplifies the loading and unloading process for non-craneable semi-trailers by using a kingpin locking system, eliminating the need for wheel chocks.

Transhipment requires regular terminals equipped with cranes or reach stackers. Consequently, the technology can be implemented at standard terminals with minimal modification.

Tatravagónka's Sdggmrss wagon with integrated basket system was introduced in 2025 and is authorised for use.

Sources: Companies' websites

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Technical Specifications for Interoperability, UIC International Railway Solutions and European Norms harmonise technical requirements across Europe

Technical Specifications for Interoperability **(TSI)**

Why do they matter for Combined Transport?

TSIs are regulatory standards at European level that harmonise the technical, operational and digital requirements for rail across Europe, enabling reliable and efficient cross-border intermodal services.

- CCS TSI: Control-Command and Signalling
- ENE TSI: Energy subsystem
- INF TSI: Infrastructure
- LOC&PAS TSI: Locomotives
- NOI TSI: Noise
- OPE TSI: Operations and Traffic Management
- PRM TSI: Accessibility
- SRT TSI: Tunnel safety
- TEL TSI: Telematics
- WAG TSI: Freight Wagons

UIC International Railway Solutions **(UIC-IRS)**

Why do they matter for Combined Transport?

UIC-IRS solutions provide harmonised technical rules for loading units, wagons and processes, making Combined Transport equipment compatible and safely usable across Europe.

- IRS 50751-4: CT Wagons: Vertical transhipment
- IRS 50751-5: CT Wagons: Horizontal transhipment
- IRS 50571-6: CT Wagons: Transport of road vehicles
- IRS 50591: Roller units for CT
- IRS 50592: Min. requirements for CT loading units
- IRS 50592-3: Acceptance tests for containers
- IRS 50596-5: Transport of vehicles on wagons
- IRS 50596-6: Coding of intermodal transport units
- IRS 50596-7: Requirements for Conformity Assessment Bodies for IRS 50596-6

European Norms **(EN)**

Why do they matter for Combined Transport?

EN norms harmonise technical requirements to ensure compatibly throughout Europe. Norms for Intermodal Loading Units and Cargo Securing (ILUCS) are coordinated by the CEN/TC 119 technical committee.

- EN 283: Testing of swap bodies
- EN 284: Definition of Class-C swap bodies
- EN 1432: Definition of swap tanks
- EN 12640: Cargo securing in CT loading units
- EN 12641-2: Min. requirements for curtainsiders
- EN 12195-1: Cargo-securing in CT loading units
- EN 13044-1: Marking of intermodal units
- EN 13044-2: Marking of swap bodies for rail operations
- EN 13044-3: Marking of semi-trailers for rail operations
- EN 16973: Craneable semi-trailers

Global initiatives provide frameworks for safe and legally sound transcontinental multimodal transport chains

Code of Practice for Packing of Cargo Transport Units (**CTU Code**)

Why does it matter for Combined Transport?

The CTU Code provides the common safety framework for the packing, securing and handling of containers and swap bodies across the entire CT chain, helping ensure that a unit can move safely between modes.

Key content relevant for Combined Transport

- **Secure loading:** The CTU Code defines good practice for stowage and securing so loads can withstand forces occurring across different modes. It addresses overloading and improper weight distribution, which are critical for road axle loads, wagon loading and terminal handling.
- **Chain of responsibility:** The CTU Code clarifies the responsibilities of shippers, packers, consignors, carriers and other actors in the Combined Transport chain. It stresses correct information on cargo contents and characteristics, reducing safety risks and operational disruptions at modal interfaces.
- **Dangerous goods and training:** The CTU Code provides guidance on dangerous goods packing and on training personnel involved in the packing, handling and unpacking of cargo transport units.

United Nations Commission on International Trade Law **(UNCITRAL)**

Why does it matter for Combined Transport?

UNCITRAL develops harmonised legal frameworks for multimodal transport contracts, cargo documents and electronic trade documentation, reducing legal fragmentation when goods move across modes and borders.

Key initiatives relevant for Combined Transport

- **Accra Convention on Negotiable Cargo Documents (2025):** Created a new negotiable cargo document that can cover goods regardless of transport mode and potentially for the entire multimodal journey.
- **Model Law on Electronic Transferable Records (MLETR, 2017):** Provides the legal basis for electronic equivalents of transferable documents, supporting paperless multimodal logistics and trade finance.
- **Model Law on Electronic Transferable Records (2008):** Establish a legal regime for door-to-door carriage involving an international sea leg, explicitly reflecting containerisation and multimodal transport under a single contract.
- **Model Law on Electronic Transferable Records (1991):** Addresses liability during handling and storage at terminals.

Sources: Organisations' websites

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09 Subsidies and funding

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EU State Aid Framework for Land and Multimodal Transport (LMTG & TBER)

Aid categories covered under LMTG

1. Aid to reduce external costs of transport
2. Aid to launch new commercial connections
3. Aid for transport facilities
4. Aid for private sidings
5. Aid for vehicles
6. Interoperability aid
7. Aid for technical adaptation and modernisation

Typical support cases for CT covered by TBER

§11	Launch of new commercial CT rail services
§12	Construction, expansion or renewal of CT terminals
§13	Construction of transhipment facilities in private sidings
§14	Acquisition of dedicated locomotives and CT wagons
§15	Acquisition of intermodal loading units
§16	Retrofit of assets to ensure interoperability (e.g. DAC, ERTMS)
§17	Technical adaptation and modernisation of assets

- The **relevant framework for transport subsidies** is the EU State aid regime, which since March 2026 is structured much more clearly through the new Land and Multimodal Transport Guidelines (LMTG) and the Transport Block Exemption Regulation (TBER).
- The two documents have distinctive functions:
  - The **LMTG** defines the Commission's criteria whether notified aid is compatible with the internal market.
  - The **TBER** defines categories of aid that are considered compatible without prior notification, provided all conditions and thresholds are fulfilled. It applies to aid schemes, individual aid under schemes and, in certain cases, ad-hoc aid, covering rail, inland waterways and sustainable multimodal transport.

Source: European Commission

EU and national funding programmes support Combined Transport to accelerate the modal shift to rail

Support programmes	Description	Financial framework conditions
European **R**egional **D**evelopment **F**und; **C**onnecting **E**urope **F**acility; **C**ohesion **F**und	CEF provides EU co-funding for TEN-T infrastructure, while ERDF and the Cohesion Fund complement transport investment. Support covers rail, terminals and multimodal links, with a focus on network completion and cross-border connectivity.	2014-2020 funds for intermodal transport projects[1]: – EUR 514 million from CEF – EUR 429 million from CF – EUR 175 million from ERDF
CEF – Military Mobility	CEF Military Mobility supports dual-use investments on the TEN-T network, adapting rail, road, ports and multimodal infrastructure to both civilian and military transport requirements.	Funds for dual-use transport infrastructure[2]: – 2021-2023: EUR 1.69 billion in across 21 states – 2028-2034: EUR 17.65 billion (proposed)
National **R**egional **P**artnership **P**lans	The proposed National and Regional Partnership Plans (NRPPs) are expected to continue key elements of the former Recovery and Resilience Facility (RRF), with EUR 865 billion foreseen for 2028-2034.	Proposed 2028-2034 allocations[2]: – EUR 68 million for Germany – EUR 90 million for France – EUR 123 million for Poland
National support packages, e.g.	Italy supports intermodal road–rail transport via Ferrobonus. Austria supports CT, RoLa and track access charges for freight trains, whereas Switzerland supports transalpine unaccompanied CT and traffic formerly transported by RoLa.	National grants for intermodal rail freight[3]: – EUR 32 million for Ferrobonus in Italy – EUR 288 billion in Austria (2023-2027) – EUR 59 million in Switzerland in 2026
Italy; Austria; Switzerland		

1) Funding continues under CEF, ERDF and CF, but no EU-wide allocation for intermodal freight is reported.
2) European Commission.
3) Official announcements of national governments and EUR-lex.

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Almost two-thirds of dedicated funding for CT is allocated to terminal infrastructure – in many Member States, CT still has to compete with other rail freight segments for access to operating aid

European subsidies for Combined Transport by country and benefitting part of the value chain (2026; in million EUR)

	AT	BE	CH	CZ	DE	ES	FR	IT	PL	PT	RO	SE	SK	Total
CT operations: All aid schemes			116				122		18				30	286
CT investment: Terminals	12		200	82	90			55	100		90		10	639
CT investment: Rolling stock									81				75	156
Total	12		316	82	90		122	55	197		90		115	1,081
Rail freight: TAC Support		13			344									357
Rail freight: Operating aid	288					75		22		1		80		465

Source: SCI Verkehr based on Ministries of Transport and state budgets of the respective countries

European support schemes for Combined Transport and rail freight as of August 2026 – there is no comprehensive overview of their impacts at European level yet

	Description	Time frame	Amount (p.a.)
AT	15% reduction in monthly motor vehicle tax	since 2014	n/a
	Support for rail freight services	2023-2027	288 EUR million
	Rail sidings & intermodal terminal funding	2023-2027	12 EUR million
BE	Reduction of rail infrastructure charges	2026-2030	13 EUR million
CH	Operating aid for transalpine CT	until 2030	In 2026: 63 EUR million
	Handling & loading contributions	since 2026	53.3 EUR million
	Investment aid for trans-shipment & loading facilities	since 2026	up to 80% of costs
CZ	Modernisation & construction of CT terminals	2022-2027	in total: 70 EUR million
CZ	Development of rail sidings	until 2027	12.4 EUR million
DE	Reduction of track access charges for rail freight	2018-2028	344 EUR million
	Investment aid for CT transhipment facilities[2]	until 2026	90.3 EUR million
ES	Eco-incentive for rail freight transport	2027-2032	~75 EUR million
FR	Operating aid per intermodal loading unit[2]	2024-2026	100 EUR million
	Cherbourg–Mouguerre rail motorway	2025-2027	22 EUR million
IT	Ferrobonus – rail freight operating aid	2023-2028	22 EUR million
	Modernisation of intermodal terminal equipment[3]	2022-2026	55 EUR million
PL	Intermodal discount on infrastructure charges	2024-2028	in 2026: 18 EUR million
	RRF – intermodal terminals, equipment & rolling stock[1]	until 2026	in total: 181 EUR million
PT	Operating aid per additional tonne-km[3]	2026	0.3 EUR million
RO	Inter-/multimodal local infrastructure[3]	until 2026	in total: 90 EUR million
SE	Environmental compensation for rail freight	2026-2030	~80 EUR million
SK	Support for development of intermodal freight transport	until 2027	in total: 30 EUR million
	Construction & modernisation of intermodal terminals	until 2027	10 EUR million
	Rail freight rolling stock acquisition	until 2029	75 EUR million

1) Successor programme planned.
2) Successor programme likely.
3) Programme will be terminated after 2026.

Sources: Ministries of Transport and state budgets of the respective countries; European Commission

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Methodology and definitions

10 Abbreviations and definitions

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Abbreviations

Abbreviations used in the report

ATO	Automatic Train Operation
bn	billion
CAGR	Compound Annual Growth Rate
CCAM	Cooperative Connected and Automated Mobility
CEF	Connecting Europe Facility
CT	Combined Transport
DAC	Digital Automated Coupling
eFTI	electronic Freight Transport Information
ERA	European Railway Agency
ERDF	European Regional Development Fund
ERTMS	European Rail Traffic Management System
EUR	Euro
FRMCS	Future Railway Mobile Communication System
FTL	Full Truck Load
GDP	Gross Domestic Product
IM	Infrastructure Manager
ISO	International Organization for Standardization
IWW	Inland Waterway
KPI	Key Performance Indicator
kt	kilo-tonne
LTL	Less than Truck Load
MS	Member State
NUTS	Nomenclature of Territorial Units for Statistics (French: “Nomenclature des Unités Territoriales Statistiques”)
OTN	Operational Train Number
p.a.	annually (Latin: “per annum”)
PLC	Primary Location Code
RoLa	Rolling motorways (German: “Rollende Landstraße”)
RRF	Recovery and Resilience Facility
RU	Railway Undertaking
TAC	Track Access Charge
TEN-T	Trans-European Transport Network
TEU	Twenty-foot Equivalent Unit
tkm	Tonne-kilometre
trn	trillion
TSI	Technical Specifications for Interoperability

Country codes

AT	Austria
BE	Belgium
BG	Bulgaria
BY	Belarus
CH	Switzerland
CN	China
CZ	Czech Republic
DE	Germany
DK	Denmark
EE	Estonia
EL	Greece
ES	Spain
EU	European Union
FI	Finland
FR	France
HR	Croatia
HU	Hungary
IE	Ireland
IT	Italy
KZ	Kazakhstan
LT	Lithuania
LU	Luxembourg
LV	Latvia
NL	Netherlands
NO	Norway
PL	Poland
PT	Portugal
RO	Romania
RU	Russia
SE	Sweden
SI	Slovenia
SK	Slovakia
TR	Turkey
UA	Ukraine
UK	United Kingdom

Definitions of technical terms

Accompanied Combined Transport	Transhipment of the loading unit together with road vehicle and driver from road to rail or IWW (“RoLa”).
Compound Annual Growth Rate (CAGR)	The mean annualised growth rate for compounding values over a given period.
Continental Combined Transport	Combined Transport of swap bodies, semi-trailers and lorries by rail or IWW, usually as part of intra-European transport chains.
Full Truck Load (FTL)	Transport of a single shipment by lorry. Does not necessarily indicate that the lorry is fully loaded.
Horizontal transhipment	Transhipment of non-craneable semi-trailers from road to rail. Can be achieved either with craneable loading platforms, special wagons and/or specific terminal infrastructure.
Incumbent	Publicly owned Railway Undertaking that developed out of a former state monopoly (e.g. DB Cargo, PKP Cargo).
Infrastructure Manager (IM)	A rail company responsible for maintaining and operating railway infrastructure.
Intermodal transport	Transport of a loading unit by various means of transport during a single transport chain.
Less than Truck Load (LTL)	Transport of several bundled shipments in the same lorry. Does not necessarily indicate that the lorry is only partially loaded.
Maritime Combined Transport	Combined Transport of ISO containers by rail or IWW, usually as part of intercontinental transport chains.
Modal split / Modal share	Measure of the distribution of transport volume or performance by modes. “Modal split” refers to the distribution over all considered means of transport, whereas “modal share” refers to the share of a specific mode of transport.
Railway Undertaking (RU)	Any public or private undertaking which provides services for the transport of goods and/or passengers by rail.
Reefer container	A temperature-controlled shipping container with an insulated body and an integrated climate-control unit used to transport and store perishable goods at defined temperatures.
Rolling motorways (RoLa)	A form of Combined Transport involving the conveying of road vehicles (e.g. lorries, tractors with or without semi-trailer attached) by rail. Not to be confused with “Autopista Ferroviaria”, a Spanish programme for the promotion of continental Combined Transport in Spain.
Shunting	Pushing or pulling a train or a part of a train from the main line to a siding or inside a railyard or terminal.
Tonne-kilometre (tkm)	A performance measure for freight transport. Product of the weight of the transported goods and the transport distance.
Track Access Charge (TAC)	All charges paid by train operating companies according to track access contracts.
Trans-European Transport Network (TEN-T)	A planned network of roads, railways, airports and water infrastructure in the European Union for coordinated improvements of primary roads, railways, inland waterways, airports, seaports, inland ports and traffic management systems to facilitate integrated and intermodal long-distance, high-speed transport connections.
Twenty-foot Equivalent Unit (TEU)	A measure for containerised units. All containerised units are expressed as a factor of twenty feet, the smallest standard container size for maritime transport.
Unaccompanied Combined Transport	Transhipment of the loading unit from road to rail or IWW independently from road vehicle and driver.
Vertical transhipment	Transhipment from road to rail by lifting a loading unit from the ground, either with a crane or a reach stacker.

11 Methodology

Approach to data collection

This report was compiled with the goal of giving a factual, complete and data-supported overview of the Combined Transport sector in Europe. However, as outlined on the next page, there are several gaps in the data landscape, so that a report relying on one single data source is not possible.

As an industry insider, SCI Verkehr (the compiler) has taken up the challenge of developing a market analysis and forecasting method which provides valid statements about current market volumes and the short- to long-term market development, even if data is not publicly available. Therefore, SCI Verkehr uses the tried-and-tested combination of bottom-up and top-down approaches for analyses and forecasts.

The basis of SCI Verkehr's information is a regular analysis of all relevant data sources worldwide. These include:

- Official government news reports and statistics
- Press releases and business reports from transport companies
- Trade journals and daily press in over 15 languages
- The conclusions from conferences and symposia

SCI Verkehr then evaluates and organises this originally unstructured and unverified data.

In spirit of the brief and to allow for continuity with former iterations of this report, data has been mostly collected from **Eurostat**. In cases where Eurostat had gaps in rail statistics (e.g. because of missing data from Member States), SCI Verkehr used its long-running in-house database to fill the gaps. This database is consistent with Eurostat data, regularly updated and is validated by industry stakeholders via multiple consulting projects that include this data.

Wherever Eurostat has not provided relevant data, other **publicly available information** has been used instead. Besides statistical data from organisations other than Eurostat, this also includes company data via annual reports and websites, as well as studies and reports published in recent years.

Only if public data was not available, has proprietary data been used. Besides data provided by the commissioners of the report and the compiler, the most important proprietary data sources were data deliveries from **train information data compiled by RailNetEurope (RNE) and CESAR-NEXT**. Please refer to pages 111 and 112 for more information on these data sources.

The data was faithfully taken from the sources indicated on each page and listed on page 113. Wherever data has been processed in any way, this is documented on pages 108-109.

Data availability: A short overview of gaps in Combined Transport statistics

- There are numerous legal texts that deal with transport in the European Union and its statistical recording. None of them currently refer directly to Combined Transport. However, the individual modes of transport address elements that are specific to CT, such as the type of loading units and goods.
- To create a catalogue of current existing statistical methodologies for intermodal statistics, the Horizon Europe project ReMuNet "**Re**silient **Mu**ltimodal Freight Transport **Net**work" carried out a metadata analysis.
- As intended, EU requirements mean that the Member States have very similar methodological characteristics when it comes to data collection. However, the scope and level of detail in the published data differ from country to country.
- The metadata analysis identified gaps in current CT statistics and gave recommendations on how to streamline CT data collection.

Identified gaps in current CT statistics

- **Inconsistent legal requirements:** No legal requirement for Combined Transport data collection at European level.
- **Lack of standardised methods:** Varying methods for data collection can lead to inconsistencies.
- **Lack of standardised parameters and units:** Various parameters are used by different entities to collect and publish data.
- **Inadequate coverage:** Some modes of transport, in particular road freight transport, may not be adequately covered.
- **Spatial resolution:** It is not completely transparent which data is actually available at a fine spatial level below NUTS 0.
- **Periodicity variance:** There may be delays or different rhythms and completion times in individual countries.

Recommendations

- **Harmonised legal frameworks:** Further harmonisation within EU and national regulations for data collection.
- **Standardised data collection methods:** Standardised collection of "must have" statistics for CT across all (European) countries.
- **Standardised data parameters and data integrity:** Standardised and uniform units of measurement for CT performance parameters over all modes of transport.
- **Improved coverage:** Streamlined data collection processes to minimise the burden while maximising the detail and frequency of data collection.
- **Enhanced data timeliness:** Implementation of efficient data processing systems that can expedite the transition from data collection to publication.

Source: SGKV/Knowledge-Based Planning report Analysis of the methodology and availability of intermodal statistics in Europe 2024 on behalf of UIRR

Calculations and data analysis approaches used for the report (1/2)

- **Page 22:** ***Total market size:*** Combination of values from different sources:
  - ***Transport performance road:*** Eurostat dataset road_tert_go "Territorialised road freight transport, by transport coverage – annual data"
  - ***Transport performance rail:*** Eurostat dataset rail_go_total "Goods transported"
  - ***Transport performance IWW:*** Eurostat dataset iww_go_atyve "Transport by type of vessel"
- **Page 26:** Combination of values from different sources:
  - ***Length road infrastructure:*** UIRR country fact sheets
  - ***Length rail infrastructure:*** SCI Verkehr Database
  - ***Length IWW infrastructure:*** Eurostat dataset iww_if_infrastr "Length of navigable inland waterways by waterway type"
- **Page 32:** Combination of values from different sources:
  - ***Combined Transport:*** Sum of CT rail performance from SCI Multiclient Study "The European Rail Freight Transport Market 2023" added to CT IWW performance from Eurostat dataset iww_go_actygo "Container transport by type of goods and coverage (from 2007 onwards)" added to CT road performance from Eurostat dataset tran_im_uroad "Unitisation in road freight transport – tonne-kilometre for gross weight of goods"
  - ***Rail freight performance (conventional):*** Difference of CT rail performance subtracted from Eurostat dataset Eurostat rail_go_grpgood "Goods transported by group of goods – from 2008 onwards based on NST 2007" (gaps filled with data from SCI Multiclient Study "The European Rail Freight Transport Market 2023")
  - ***IWW freight performance (conventional):*** Difference of CT IWW performance subtracted from Eurostat dataset iww_go_atygo "Transport by type of good (from 2007 onwards with NST2007)"
  - ***Road freight performance (conventional):*** Difference of CT road performance subtracted from Eurostat dataset road_go_ta_tott "Road freight transport by type of operation and type of transport (t, tkm, vehicle-km) – annual data"
- **Page 33:** Quotient of transport performance for CT divided by total transport performance
- **Page 34:** Quotient of transport volume from Eurostat dataset iww_go_actygo "Container transport by type of goods and coverage (from 2007 onwards)" divided by transport volume from Eurostat dataset iww_go_atygo "Transport by type of good (from 2007 onwards with NST2007)"
- **Page 36, 37:** ***Accompanied continental CT:*** Based on Eurostat dataset rail_go_contwgt "Goods transported in intermodal transport units" (Road vehicles (accompanied)), validated and complemented by UIRR annual statistics based on input provided by members
- **Page 38:** ***Cross-border transport volume:*** Based on Eurostat dataset rail_go_contwgt "Goods transported in intermodal transport units" (International transport) divided by 2 to counteract double-counting (once in country of loading and once in country of unloading)
- **Page 40:** ***Cross-border transport volume:*** Based on Eurostat dataset rail_go_contwgt "Goods transported in intermodal transport units" (International transport), validated and complemented by UIRR annual statistics based on input provided by members, divided by 2 to counteract double-counting (once in country of loading and once in country of unloading)
- **Page 40, 41:** ***Accompanied continental CT:*** Based on Eurostat dataset rail_go_contwgt "Goods transported in intermodal transport units" (Road vehicles (accompanied)), validated and complemented by UIRR annual statistics based on input provided by members
- **Page 42:** ***Missing CT cross-border shares:*** Based on analysis of RNE train information dataset (please refer to page 111) for week of 12-20 September 2025 based on parameters origin_country, and destination_country of observed train runs
- **Page 39, 40:** For methodology of ***SCI Verkehr Rail Freight Market Forecast***, please refer to page 110
- **Page 42:** ***Corridor data:*** Based on analysis of RNE train information dataset (please refer to page 111) for week of 12-20 September 2025 based on the parameters origin_country and destination_country of observed train runs

Calculations and data analysis approaches used for the report (2/2)

- **Page 47: *CT connections:*** Based on analysis of CESAR-NEXT tracking & tracing train information dataset (please refer to page 112) for timeframe of 2-29 November 2025 based on parameters origin_country, origin_terminal, final_country, final_terminal and real_departure of observed train runs
- **Page 49:** For methodology of ***SCI Verkehr Rail Freight Market Forecast***, please refer to page 110
- **Page 52: *Modal split for Europe-East Asia trade:*** Calculated based on different sources:
  - ***Air:*** Volumes as stated in Eurostat dataset avia_goexcc "International extra-EU freight and mail air transport by reporting country and partner world region and countries" for transport between EU countries and stated countries in East Asia
  - ***Maritime:*** Volumes as stated in Eurostat dataset mar_go_qm_c2026 "Volume of containers transported to/from main ports – quarterly data (2019 to 2020)" for transport between EU countries and stated countries in East Asia
  - ***Rail:*** Volume as stated in Eurasian Rail Alliance Index Statistics between EU countries and stated countries in East Asia
- **Page 54: *CT connections:*** Based on analysis of CESAR-NEXT tracking & tracing train information dataset (please refer to page 112) for timeframe of 2-29 November 2025 based on parameters origin_country, origin_terminal, final_country, final_terminal and real_departure of observed train runs
- **Page 55: *Averages by corridor:*** Based on analysis of RNE train information dataset (please refer to page 111) for week of 12-20 September 2025 based on parameters origin_country, origin_timetable_time, origin_delta, destination_country, destination_timetable_time, destination_delta, section_planned_distance and section_actual_distance of observed train runs
- **Page 56, 57: *Delayed CT trains by time group:*** Based on analysis of RNE train information dataset (please refer to page 111) for week of 12-20 September 2025 based on parameters destination_timetable_time and destination_delta of observed train runs
- **Page 57*: Delay of selected cross-border CT train pairs by time group:*** Based on analysis of RNE train information dataset (please refer to page 111) for week of 12-20 September 2025 based on parameters origin_timetable_time, origin_delta, destination_timetable_time and destination_delta, of observed train runs
- **Page 54: *CT performance:*** Calculated as product of train run distance based on analysis of RNE train information dataset (please refer to page 111) parameters section_planned_distance and section_actual_distance of observed train runs for week of 12-20 September 2025 multiplied by 1,087 tonne (average weight of CT train in the Netherlands in 2023)
- **Page 55: *Road distances for container transport within Switzerland:*** Calculated as shares based on Federal Statistical Office Switzerland dataset "Transportgut nach Frachtart und Distanzklasse" (Grosscontainer und andere grosse Behälter)
- **Page 56: *LTL share:*** Calculated as quotient of revenue from LTL business divided by sum of revenue from LTL and FTL business
- **Page 57: *Connections with horizontal transhipment:*** Calculated by adding up all RoLa connections and all connections offering transhipment with CargoBeamer, Megaswing, Modalohr, NIK or R2L technologies advertised by CargoBeamer, CFL Intermodal, TX Logistik, Rail Cargo Austria, VIIA and Brittany Ferries within a standard week

SCI Verkehr forecast methodology focuses on main drivers and qualitative assessment of further influencing factors

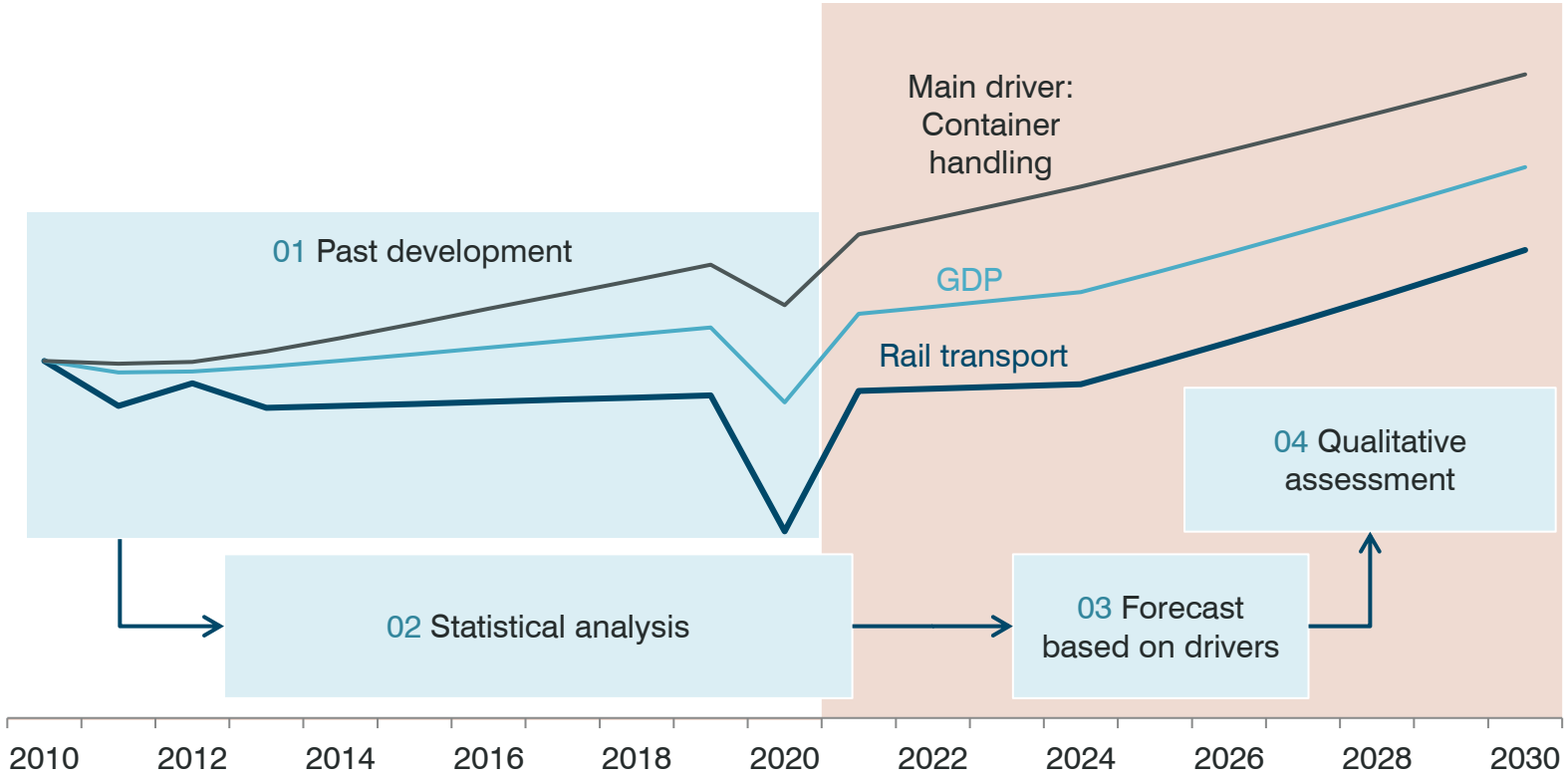
Development of drivers for the SCI forecast of rail freight performance

01 Past development of rail transport and its drivers

02 Calculating a model that fits this development (linear regression)

03 Forecasting transport development based on development of drivers
- External sources: IMF, World Bank, UN, Eurostat, etc.

04 Assessing results qualitatively
- Infrastructure development
- Perspectives for countries and segments



Source: SCI Verkehr

RNE train information data

- RailNetEurope (RNE) provided the compilers with an excerpt of train information data for 2025 from the Train Information System (TIS).
- The data excerpt was compiled to enable the analysis of real-world operational data from Combined Transport trains regarding travel distances, travel times, frequencies of service and delays.
- To avoid any effects of holidays, the data excerpt contained all trains between 12 and 20 September 2025, as this week does not contain any national holidays which could affect timetables.
- The data was processed and analysed in-house by the compilers of this report.

Identification of Combined Transport trains

Trains were identified as Combined Transport trains if at least one of the following conditions was met:

1. Train starts anywhere and has a reference Operational Train Number (OTN) between 40000 and 43999;
2. Train starts at a Primary Location Code (PLC) that is identified with a terminal from the UIRR terminal reference list and ends at an PLC that is identified with a terminal from the UIRR terminal reference list;
3. Train starts in Belgium and has a reference OTN between 3##70 and 3##99.

This approach is conservative and likely to underreport existing CT connections, especially between ports and on domestic connections. Therefore, the data presented only represents a subsample of all CT connections in Europe in a given week.

Data attributes provided by RNE

- train_id
- reference_ot
- type
- origin_country
- origin
- origin_plc
- origin_latitude
- origin_longitude
- origin_timetable_time
- origin_running_time
- origin_delta
- destination_country
- destination_timetable_time
- destination_running_time
- destination_delta
- destination
- destination_plc
- destination_latitude
- destination_longitude
- train_section_id
- section_country
- planned_distance group
- actual_distance group
- section_planned_distance
- section_actual_distance
- otn_str

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CESAR-NEXT tracking and tracing train information data

- CESAR-NEXT provided the compilers with an excerpt of train information data for 2025 from their tracking and tracing tool.
- The data excerpt was compiled to enable the analysis of real-world operational data from Combined Transport trains regarding travel distances, travel times, frequencies of service and delays.
- The data excerpt contained all train runs tracked by CESAR-NEXT between 2 and 29 November 2025. The data contained trains by the following operators: Adria Kombi (Slovenia), Hupac (Switzerland), Kombiverkehr (Germany), Mercitalia Intermodal (Italy), Novatrans (France), Rail Cargo Operator (Austria).
- The data was processed and analysed in-house by the compilers of this report.

Data attributes provided by CESAR-NEXT

- transport_order_number
- traffic_type
- unit_type
- unit_length
- unit_feet
- tare_in_kg
- net_weight
- gross_weight
- full_empty
- unit_profile
- unit_specialization
- first_mile_place
- last_mile_place
- origin_terminal
- origin_terminal_name
- origin_country
- departure_port
- departure_pier
- destination_port
- destination_pier
- final_terminal
- final_terminal_name
- final_country
- real_departure
- route_description
- goods_type
- dang_goods_#_un_number
- dang_goods_#_class
- dang_goods_#_description
- dang_goods_#_nag_description
- dang_goods_#_classification_code
- dang_goods_#_kemmler_number
- dang_goods_#_cas_number
- dang_goods_#_package_quantity
- dang_goods_#_package_type
- dang_goods_#_package_group
- dang_goods_#_dang_good_rules
- dang_goods_#_net_weight
- dang_goods_#_marginal_1144
- dang_goods_#_explosive_weight
- dang_goods_#_ex_dangerous_mark
- goods_#_description
- goods_#_net_weight
- goods_#_package_quantity
- goods_#_package_type
- waste_#_type
- customs_doc_#_document_type
- customs_doc_#_departure_customs_office
- customs_doc_#_departure_country
- customs_doc_#_arrival_customs_office
- customs_doc_#_arrival_country
- customs_doc_#_document_date

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