



An unexpected strong contraction

The first three months of 2026 brought an unexpected and significant decrease in the European Combined Transport performance. While the energy crisis does not impact Combined Transport as strongly as the diesel-dependent road haulage sector, the extensive disruptions on the railway infrastructure caused a **decline of 4,9% in the number of consignments transported**.

transported.

The sharp loss of intermodal volumes observed during 2025, mainly in Germany due to the full line closures of DB InfraGO, continued into the first quarter of 2026:

- **Infrastructure chaos:** Intermodal freight trains were not granted adequate bypass opportunities around sections of lines that were fully closed for maintenance works in Germany and other European countries. The excessive operating costs for the occasionally multiple-hundred-kilometre-long and technically inferior bypass routes were not compensated for either.
- **The general weakness of the EU economy freed up trucking capacities, making reverse modal shift an easy choice for shippers.**

The war in Iran and the Persian Gulf brought about a global economic and energy crisis, which also hit Europe's transport sector. The reliance of the continent to imported crude oil was exacerbated by the fact that Europe only produces 70% of the diesel it uses; the remaining 30% must be imported as a refined oil product. As it is dominantly powered by electricity, Combined Transport is less impacted. Nevertheless, the various state aid measures put in place to support the diesel-dependent trucking sector and the prevailing rail infrastructure challenges prevented Combined Transport from stepping into the shoes of long-distance road hauliers.

Three events shaped the period on the European stage:

- **The Military Mobility event** organised by [LTG in Vilnius](#), where the potential of intermodal rail freight to aid military logistics was highlighted;
- **The Amazon Expo in Brussels**, attesting to the commitment of this global online marketplace giant to using Combined Transport;
- **Combined Transport for Island Nations in the European Parliament**, which explained the reliance of Europe's island populations and island economies on the transport of freight in unaccompanied intermodal loading units, and thus their reliance on the Combined Transport Directive.

The business sentiment within the European Combined Transport Community turned slightly negative for the coming 12-month period. The main factors behind were the severely deteriorating infrastructure conditions of running intermodal freight trains, which are not limited to Germany, coupled with a lacklustre economic growth and the difficulties in the maritime supply chain.

Ralf-Charley Schultze

Director General



Nordic Seminar 2026

1-2 September 2026, Stockholm

CT4EU - MLSZKSZ - UIRR

6th Central European Intermodal Conference

29 October 2026, Budapest

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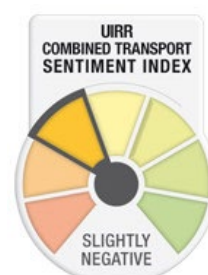
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UIRR Quarterly CT Performance Gauge



Business outlook for the 12 months between

1 April 2026 - 31 March 2027



November 2025: a global monthly container record

January 2026

Global container volumes in November 2025 reached an impressive 16,6 million TEUs, ranking it as the third-highest month in what has already been an exceptionally strong year. Volumes were up 7% compared with November 2024 and 12% versus 2023.

[Link: https://www.uirr.com/web-news/global-monthly-loaded-container-record-november-2025](https://www.uirr.com/web-news/global-monthly-loaded-container-record-november-2025)

Maritime intermodal freight transport developments continue

January 2026

Intermodal expansion: through its logistics subsidiary Medlog, MSC acquired Seaway's intermodal division, which moves over 400 trains per year in Australia. Cosco at the same time acquired 80% of the shares of Konrad Zippel Spediteur, a German intermodal operator active with rail connections between the ports of Hamburg and Bremerhaven and Berlin, Leipzig and Schkopau.

[Link: https://www.uirr.com/web-news/msc-and-cosco-continue-global-intermodal-expansion](https://www.uirr.com/web-news/msc-and-cosco-continue-global-intermodal-expansion)

The intermodal loading unit of preference, the role of the semi-trailer

February 2026

The European Union is targeting a 30% modal share for rail and inland waterway transport over distances greater than 300 kilometres by 2030. Can the ubiquitous semi-trailer, the workhorse of the road, be the key to delivering the desired modal shift?

[Link: https://www.uirr.com/web-news/future-loading-units-european-combined-transport-what-role-semi-trailer](https://www.uirr.com/web-news/future-loading-units-european-combined-transport-what-role-semi-trailer)

Ukraine wants more trailers on rail

February 2026

There is growing interest in rail solutions for transporting semi-trailers from Ukraine to Europe, as driver shortages and war-related uncertainties have increased. There are an increasing number of services on offer already.

[Link: https://www.uirr.com/web-news/interest-semi-trailers-on-rail-ukraine-growing](https://www.uirr.com/web-news/interest-semi-trailers-on-rail-ukraine-growing)

399 new intermodal wagons for Spain

February 2026

399 newly built intermodal wagons were placed into service in Spain: The 80' and 90' wagons are intended to carry all standard container types on the Iberian network, while the T4000 wagons are specified for the transport of semi-trailers within Spain.

[Link: https://www.uirr.com/web-news/399-intermodal-pocketwagons-spain](https://www.uirr.com/web-news/399-intermodal-pocketwagons-spain)

European rail freight is not in a simple crisis, it's in a full decline

January 2026

Over the past couple of years, the narrative around European rail freight was one of stagnation. Data from Eurostat is now showing that this is no longer the case: it is a full-on decline in basically every Member State.

[Link: https://www.uirr.com/web-news/european-rail-freight-not-stagnating-its-fully-declining](https://www.uirr.com/web-news/european-rail-freight-not-stagnating-its-fully-declining)

Could Combined Transport replace the single wagonload production system?

January 2026

Single wagonload (SWL) traffic serves industries that cannot fill complete trains. Across Europe, this segment faces an existential crisis. While governments pour billions into subsidies, the fundamental structural problems remain unaddressed. Before investing in preserving single wagonload operations, policymakers must confront a fundamental question: could Combined Transport simply replace SWL?

[Link: https://www.uirr.com/web-news/could-ct-replace-sw](https://www.uirr.com/web-news/could-ct-replace-sw)

Unaccompanied CT: the lifeline for European island residents and economies

March 2026

Shippers, transport operators and Members of the European Parliament came together to discuss the role of unaccompanied Combined Transport in supporting the economies of island nations and island residents by providing an efficient connection to the EU Single Market.

[Link: https://www.linkedin.com/posts/uiirr_key-role-of-trailers-and-containers-in-supplying-activity-7441150379452461056-hQFV](https://www.linkedin.com/posts/uiirr_key-role-of-trailers-and-containers-in-supplying-activity-7441150379452461056-hQFV)

Intermodal freight: a driving force for small towns and municipalities

April 2026

Intermodal freight transport is not just a development direction for sustainable logistics... the industry has repeatedly proven to be a driving force for modern industry and services, and the availability of container terminals is a significant advantage.

[Link: https://www.uirr.com/web-news/intermodal-industry-driving-force-small-towns-and-municipalities](https://www.uirr.com/web-news/intermodal-industry-driving-force-small-towns-and-municipalities)

European Combined Transport in a wait-and-see mode

March 2026

The Combined Transport industry in Europe saw a slight deterioration in its performance in the fourth quarter of 2025. Nevertheless, the total annual output in 2025 exceeded that of a year earlier.

[Link: https://www.uirr.com/web-news/european-combined-transport-remains-wait-and-see-mode](https://www.uirr.com/web-news/european-combined-transport-remains-wait-and-see-mode)

Could the Combined Transport Directive amendment survive?

January 2026

The European Parliament rejected the “withdrawal of the Combined Transport Directive revision proposal”. The EU Council will also have to decide on whether or not to continue the legislative process.

[Link: https://www.uirr.com/web-news/combined-transport-directive-might-survive-after-all](https://www.uirr.com/web-news/combined-transport-directive-might-survive-after-all)

The new TEN-T is beneficial for Combined Transport

March 2026

The European Combined Transport Community supports the adoption of amendments to the TEN-T Guidelines Regulation (Regulation 2024/1679), which address a number of key industry concerns. Main lines and terminals should be upgraded to technical parameters needed for every form of intermodal rail freight.

[Links: https://www.uirr.com/web-news/changes-ten-t-regulation-beneficial-intermodal-transport](https://www.uirr.com/web-news/changes-ten-t-regulation-beneficial-intermodal-transport)

Combined Transport and the energy crisis: an opportunity

March 2026

Combined Transport was formally incorporated into the European transport thinking during the oil crises of the 1970s. The present-day energy crisis, caused by the wars in Ukraine and Iran, present the opportunity of relying on a proved solution provider in Combined Transport to EU policymakers.

[Link: https://www.uirr.com/press-releases-publications/press-release-energy-crisis](https://www.uirr.com/press-releases-publications/press-release-energy-crisis)

Rising diesel prices: not a big risk for Combined Transport

March 2026

The growing diesel prices are not an immediate cause for alarm for door-to-door Combined Transport since both pure-road and rail transporters are facing the same challenge.

[Link: https://www.uirr.com/web-news/rising-fuel-prices-no-large-crisis-ct](https://www.uirr.com/web-news/rising-fuel-prices-no-large-crisis-ct)

Serbia to rebuild 1.200km of rail until 2035

February 2026

Serbia plans to build or modernise 1.219 kilometres of railway over the next decade, according to the national strategy “Serbia 2030”. The ambitious plans will provide a modernised network in the landlocked Balkan country.

[Link: https://www.uirr.com/web-news/serbia-wants-build-over-1200-km-railway-2035](https://www.uirr.com/web-news/serbia-wants-build-over-1200-km-railway-2035)

Portugal reduces track access charges for freight trains

March 2026

Freight train operators in Portugal will have reduced increases in the track access charges (TAC). The infrastructure manager (IP – Infraestruturas de Portugal) released an updated version of the network statement for 2025, 2026 and 2027.

[Link: https://www.uirr.com/web-news/portugal-limits-track-access-charges-increase-freight](https://www.uirr.com/web-news/portugal-limits-track-access-charges-increase-freight)

MFF 2028-34: the transport sector asks for more European funding

February 2026

Europe’s transport sector strongly urges the EU Member States to strengthen European funding for transport under the future EU budget. A robust European transport network is of crucial importance in responding to Europe’s strategic objectives, making adequate European support to the sector more pertinent than ever. Only with strong and state-of-the-art transport infrastructure at its core, will Europe be able to ramp up its resilience and military preparedness, reinforce its industrial competitiveness and safeguard its supply chain sovereignty.

[Link: https://www.uirr.com/joint-statement-press-releases-publications/open-letter-eu-transport-budget](https://www.uirr.com/joint-statement-press-releases-publications/open-letter-eu-transport-budget)

North America: Q1.2026 intermodal freight stagnates

April 2025

During Q1.2026, cumulative North American rail freight volume reached **8,24 million units**, an overall increase of **1,8%** compared to the same period in 2025. The net intermodal shipping landscape was nearly flat, pacing **0,1% lower** than the previous year due to domestic U.S. inventory adjustments.

[Link: https://www.aar.org/data-center/](https://www.aar.org/data-center/)

Personnel News

DUSS

01.04.2026



André Böttcher has been appointed as the new Head of Sales/Marketing and Purchasing at Deutsche Umschlaggesellschaft Schiene-Straße (DUSS) mbH. He succeeds Peter Hirsch, who is stepping down after more than 13 years of successful service in the position. André. Böttcher brings extensive industry experience to the role to ensure continuity in the company's business partnerships.

ERMEWA / STREAM

24.02.2026



Stream and its subsidiary Ermewa, one of Europe's leading freight railcar lessors, are entering the next phase of their corporate development. **Peter Reinshagen** is moving to Stream as Business Development Director. As part of a long-term succession plan, **Cyrille Guyon** is taking over as Managing Director of Ermewa as of February 18, 2026. **Bernhard Hoffmann** is joining Ermewa's Executive Management as Chief Commercial Officer (CCO). [Read more](#). Peter Reinshagen became President of UIP in May: [Read more](#).

HUPAC GROUP

01.06.2026



Michail Stahlhut has been appointed as the new CEO of the Dutch service provider Rail Innovators Group (RIG). The former Hupac CEO and UIRR Board Member brings his extensive leadership experience to accelerate RIG's growth and expand its overall European presence across its four rail freight and logistics subsidiaries. [Read more](#).

KOMBIVERKEHR

01.06.2026



Dirk Steffes has been appointed as Managing Director of Kombiverkehr KG, sharing leadership responsibilities alongside Heiko Krebs. He succeeds Armin Riedl, who is stepping down at the end of June 2026 after more than 30 years at the helm, though Riedl will remain in an advisory capacity until mid-2027. In his new role, Dirk Steffes will oversee sales, corporate communications, and human resources, bringing extensive international experience from senior roles at DB Cargo, TX Logistik, and Mars Inc.

Members' & Partner's News

BALTIC RAIL CARGOBEAMER CFL MULTIMODAL COMBIBERIA

- [Baltic Rail's publishes its 2025 results](#). Traffic through Baltic Rail's terminals grew by 19% during 2025.
- [CargoBeamer opens new connection between Liège and Domodossola](#).
- [Transformation of CFL port services into CFL cargo Belgium](#).
- [Combiberia plays a key role in the implementation of the European Combined Transport agreement in Spain, acting as an integrator of intermodal rail transport](#).

CONTARGO

- [Contargo beteiligt sich an Cargo-Center-Graz Logistik & Contargo übernimmt PortShuttle & Contargo erweitert batterieelektrische Lkw-Flotte auf 90 Fahrzeuge & Neuer Binnenschiffs-Linienverkehr: Ludwigshafen - Moerdijk \(NL\)](#)

DUISPORT EAST WEST IL GPM

- [Joint CO₂ study by duisport, the Port of Antwerp-Bruges, Fluxys and Chane was presented at CCUS event at Haniel](#).
- [Now an official Network Partner of R2L - Roadraillink](#).

GYSEV CARGO HUPAC

- [Port of Marseille Fos, CNR and VNF launch a new aid scheme to support and develop river container transport between Fos and Lyon](#).
- [Strategic cooperation agreement with Adria Port Zrt. to further develop a sea-rail connection between Trieste \(IT\) and Hungary](#).
- [Hupac supports the Save Combined Transport campaign and petition](#).

INTERPORTO BOLOGNA KTL

- [Interporto Bologna SpA and Condominio Interporto have begun renewing the access control system at the Bologna Interporto](#).
- [Pilot project, together with Kombiverkehr, Transcoopog AG, DUK Dörpen and Wecon](#).

LTG CARGO

- [LTG Cargo updated the Green Kilometer Calculator & Lithuanian generators for Ukraine successfully reached the country by rail](#).

METRANS

- [METRANS signed a contract with Hilal Trans strengthening THEIR partnership and opening the next phase of cooperation](#).

NAVILAND CARGO

- [Acquisition of Seatruck, Naviland Cargo strengthens its Navitrucking network and completes its road transport offering](#).

NOVATRANS-GREENMODAL

- [Interview of Managing Director Tristan Ziegler in GNTC's newsletter on the figures and the group's vision](#).

RAIL CARGO GROUP

- [ÖBB Rail Cargo Group \(RCG\) once again achieved a "B" rating in renowned CDP rating, placing the company above the global average](#).

SAMSKIP

- [Agreement with CLdN to sell its UK and Ireland \(UKI-trade\) door-to-door and quay-to-quay cargo business](#).

T3M

- [Nouveau plan de transport : les liaisons ferroviaires reliant Toulouse et Bordeaux à Lille opérées depuis le terminal de Dourges, Delta 3](#).

VAN DER VLIST

- ["Riding the new Verona – Rostock Rail Route". & Growth in transatlantic transport activities](#).

WIENCONT

- [Report on activities in the ORF magazine Wien heute from 08.02.2026](#).

EQUIMODAL

- [Launched a new painting line alongside the manufacture of an 18 x 4 x 4 m electrical room](#).

HACON

- [FP1 MOTIONAL demonstration with CFL: seamless, cross-border, and multimodal travel in Europe isn't a distant dream, it's a reality](#).

GREENBRIER

- [Review of the first Shimmns wagon built for the Spanish market – TRAMESA](#).

LOHR

- [Discussion on railway innovations with Jean Castex \(CEO of SNCF Group\) and Franck Leroy \(president of Région Grand Est\)](#).

MODALIS

- [Modalis becomes MODAL Group. & Modalis is one of the main investors in the 5 public ports in Moselle and Meurthe-et-Moselle](#).

TRANSPOREON

- [eCMR: By 2027 all EU authorities will be legally required to accept digital transport data](#).

VTG

- [Strengthening Intermodal Transport in Spain with 399 New Wagons](#).

Key Dates & Events

3.-5.6.26 – Barcelona (ES)
9-11.06.26 – Karlsruhe (DE)
9-11.06.26 – London (UK)
10-12.6.26 – Janów Podlaski (PL)
30.06-2.7.26 – Birmingham (UK)
6-10.7.26 – Toulouse (FR)
1.-2.9.26 – Stockholm (SE)
7-9.9.26 – Baku (AZ)
22-25.9.26 – Berlin (DE)
22-23.9.26 – Brussels (BE)

- [SIL Barcelona](#)
- [VDV Jahrestagung 2026](#)
- [14. International Railway Summit](#)
- [Intermodal Poland](#)
- [Multimodal](#)
- [World Conference on Transport Research \(WTCR\)](#)
- [Nordic seminar \(UIRR\)](#)
- [Black and Caspian Freight Forum](#)
- [InnoTrans 2026](#)
- [Trimble Insight Europe 2026 \(Transporeon Summit\)](#)

23-25.9.26 – Istanbul (TUR)
28.9.-1.10.26 – Brussels (BE)
8-9.10.26 – Milano (IT)
14-16.10.26 – Duisburg (DE)
14-16.10.26 – Padova (IT)
20-21.10.26 – Bucharest (RO)
29.10.26 – Budapest (HU)

17-19.11.26 – Batumi (GE)
25.11.26 – Bruges (BE)

- [F&L Conference](#)
- [Connecting Europe Days](#)
- [FIATA World congress](#)
- [Europe-Asia Intermodal Logistics](#)
- [Green Logistics Expo](#)
- [Railway Days Summit](#)
- [CT4EU-MLSZKSZ: Central Europe Intermodal Conference](#)
- [Multimodal Transport & Transit Forum](#)
- [Intermodal Market Place](#)