



A summer of uncertainties

Over the past three months, the performance of European Combined Transport has stabilised, reaching **+0.29%**. This is a relatively strong result considering the severe headwinds that the sector faces. However, behind this figure lies a variety of local realities hitting European Combined Transport Operators and Terminals.

This summer, on top of the energy crisis, chaos on the German network, and a series of local disruptions, weather conditions are further complicating business operations - with low water levels on the Danube and Rhine forcing Inland Waterway operators to shift traffic to rail and road where capacity allows.

These challenges paint a divided picture of our sector, with Western and North-Eastern Europe outperforming:

- **France** benefit from active policy effort by authorities, who maintain promotional work towards shippers and keep funding the purchase of intermodal equipment.
- The **Baltics** and **Poland** show solid performance, rebounding after a challenging consolidation period in 2025.

This contrasts sharply with the difficulties experienced in other countries:

- **Germany's** infrastructure chaos continues to weigh on the overall performance. However, hope remains for more streamlined renovation works, better coordination and differentiated approaches, as new Transport Minister Steffen Bilger acknowledges failures in the "Generalsanierung" concept.
- **Italy's** Fréjus line closes again this autumn. This comes as Tarvisio-Villach's closure hits Trieste and Monfalcone, paralleling the Slovenian crossing which will also be closed. Traffic rerouting will only be possible via the Brenner, which only reopened recently.
- Routes to **Türkiye** could also face full disruption if Romanian and Bulgarian infrastructure managers proceed simultaneously with their maintenance plan. The Ruse-Giurgiu corridor is the only alternative to Dimitrovgrad-Niš, which will be closed for maintenance in Serbia.

Once again, a familiar pattern emerges: uncoordinated maintenance works and underperforming bypass routes inflate costs and degrade transport quality, leading to an unbalanced competition with unimodal road.

Legislative prospects look positive: a communication is expected on the fate of the Combined Transport Directive amendment proposal after the Summer, and it is likely to stay on the Commission's workplan. TEN-T Guidelines and the Capacity Regulation implementation continue. New developments on the Train Driver Directive and ERA Regulation are also foreseen.

This back-to-office period also brings major changes in DG Move, with Kristian Schmidt (Director C), Jean-Louis Colson (HoU Road), Sandro Santamato (HoU Rail), and Annika Kroon (HoU Maritime Transport and Logistics) all being replaced.

Business sentiment within the European Combined Transport Community remains slightly negative as short-term prospects of improvements remain uncertain.

Ralf-Charley Schultze

Director General

UIRR webinar on ILU-Tech

iLU-Tech Database

webinar on the future of digital ILU technical database, introduction to requirements from Telematics TSI and demonstration of the BIC BoxTech

4 September 2026, 10:00-11:00 - [Register](#)

CT4EU - MLSZKSZ - UIRR

6th Central European Intermodal Conference

29 October 2026, Budapest - [Register](#)

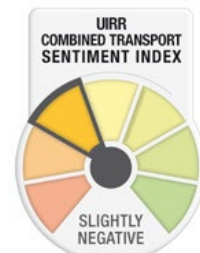
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UIRR Quarterly CT Performance Gauge



Business outlook for the 12 months between 1 June 2026 - 31 May 2027



Germany: Infrastructure works remain a headache for CT operators

June 2026

DB InfraGO's uncoordinated construction works cause massive delays, up to five days at major ports. The impact is such that steel producers face raw material shortages. Local problems in Germany impact cross border severely, an example is Bavaria which has reportedly rejected DB's Kufstein-Ostermünchen line. This could delay the important access to the Brenner Base Tunnel until 2050, further threatening the Verona-Munich corridor's logistics potential.

[Link: https://www.uirr.com/web-news/german-rail-completely-out-control](https://www.uirr.com/web-news/german-rail-completely-out-control) & <https://www.uirr.com/web-news/german-access-routes-brenner-possibly-delayed-2050>

Italian rail freight experienced yet another negative year

May 2026

Italian rail freight fell again in 2025, down 3,5% in train-kilometres and 1,3% in tonne-kilometres. The North still dominates volumes, though Sicily grew, while the Northwest declined. Transalpine traffic also dropped despite reopened Alpine lines. In parallel, four Emilia Romagna players launched an initiative to double freight volumes.

[Link: https://www.uirr.com/web-news/italian-rail-freight-posts-yet-another-negative-year](https://www.uirr.com/web-news/italian-rail-freight-posts-yet-another-negative-year) ; <https://www.uirr.com/web-news/four-players-northern-italy-launch-initiative-double-rail-freight-volumes>

Infrastructure works and wagon rules harmed Swiss rail freight in 2025

April 2026

Swiss rail freight declined again in 2025, with transalpine modal share falling below 70% for the first time since the mid-2010s. German infrastructure works along the Rhine corridor, plus Simplon and Domodossola-Milan closures, hindered performance. New wagon wheel safety rules also pushed shippers towards road. VAP expects further decline in 2026 after the cancellation of the transalpine rolling motorway (RoLa).

[Link: https://www.uirr.com/web-news/infrastructure-works-and-wagon-rules-harmed-swiss-rail-freight-2025](https://www.uirr.com/web-news/infrastructure-works-and-wagon-rules-harmed-swiss-rail-freight-2025)

French rail freight market marking time but Combined Transport buoyant

May 2026

The economic slowdown in Europe and the disruption caused by geopolitical crises means France's rail freight players have been largely marking time since the start of the year, according to CEO of DB Cargo France, Alexandre Gallo. However, Combined Transport remains buoyant.

[Link: https://www.uirr.com/web-news/french-rail-freight-market-marking-time-combined-transport-buoyant](https://www.uirr.com/web-news/french-rail-freight-market-marking-time-combined-transport-buoyant)

Record share of intermodal freight on Polish railways

April 2026

The Polish intermodal sector recorded its highest historical market presence despite a general decline in national freight volumes below 220 million tons.

[Link: https://www.uirr.com/web-news/record-share-intermodal-on-polish-railways](https://www.uirr.com/web-news/record-share-intermodal-on-polish-railways)

Spain-France freight traffic reaches all-time monthly high on Perthus railway

July 2026

The standard-gauge Figueres-Perpignan railway connecting Spain and France has broken multiple performance records in June. Despite earlier closures in Barcelona's Rubí tunnel and a general downturn in freight volumes in Spain, the line is on track to match 2025's results.

[Link: https://www.railfreight.com/railfreight/2026/07/08/spain-france-freight-traffic-grows-to-all-time-monthly-high/](https://www.railfreight.com/railfreight/2026/07/08/spain-france-freight-traffic-grows-to-all-time-monthly-high/)

Competition between rail and road is mostly about funding, not business

May 2026

Leaders of the intermodal industry gathered at the [CT4EU Conference](#) in Brussels with the motto 'It's time to combine' to continue with the creation of a truly European sector and to bring the community together. The main takeaways from the event, led by UIRR, are that challenges will likely remain and that only a cooperative effort with combined transport at the centre can contain the damage, especially in these times of crises.

[Link: https://www.uirr.com/web-news/competition-between-rail-and-road-mostly-about-funding-not-business](https://www.uirr.com/web-news/competition-between-rail-and-road-mostly-about-funding-not-business)

The market demand for rail freight is huge

May 2026

At first glance, it appears that rail freight transport in Europe is on an inevitable downward trajectory and will eventually disappear almost entirely. This comes despite forecasts of strong growth in overall freight transport. Guest author Reinhard Christeller discusses the many reasons behind this ongoing negative trend but also highlights the already existing demand and how it could develop in the future.

[Link: https://www.uirr.com/web-news/market-demand-rail-freight-huge](https://www.uirr.com/web-news/market-demand-rail-freight-huge)

The Netherlands announces even higher track access charges for 2027

May 2026

The Dutch rail infrastructure manager ProRail has announced a track access charge (TAC) increase starting in 2027. A minor year-on-year price hike for most freight trains was already announced in 2024, but ProRail now says it will implement an additional indexation to raise prices by 2,1% more.

[Link: https://www.uirr.com/web-news/netherlands-announces-even-higher-track-access-charges-2027](https://www.uirr.com/web-news/netherlands-announces-even-higher-track-access-charges-2027)

Rail associations throw last Hail Mary to save Combined Transport Directive

June 2026

Six major rail associations, including UIRR, urged EU institutions not to withdraw the Combined Transport Directive. A compromise could be to keep the 1992 definition, adding a revision clause, and advancing on all the other elements like digitalisation, framework conditions and driving-ban exemptions.

[Link: https://www.uirr.com/web-news/rail-associations-throw-last-hail-mary-save-combined-transport-directive](https://www.uirr.com/web-news/rail-associations-throw-last-hail-mary-save-combined-transport-directive)

Just one way to calculate transport emissions

April 2026

MEPs approved a single EU methodology for calculating transport GHG emissions, voluntary unless used for reporting, contracts or marketing. It prioritises primary data, and the Commission must deliver a free SME calculation tool within four years. Life-cycle emissions remain excluded for now. Rules apply four and a half years after entry into force..

[Link: https://www.uirr.com/web-news/just-one-way-calculate-transport-emissions](https://www.uirr.com/web-news/just-one-way-calculate-transport-emissions)

Will the EU's electricity tax plans be of any help to rail freight?

April 2026

The Commission's AccelerateEU package proposes capping electricity taxes at diesel tax levels to boost sustainable energy and rail freight's competitiveness against road transport. However, electricity taxes across most EU Member States already sit below diesel rates, so immediate cost relief looks unlikely. Still, the measure could prevent members from cutting diesel taxes without matching electricity cuts.

[Link: https://www.uirr.com/web-news/will-eus-electricity-tax-plans-be-any-help-rail-freight](https://www.uirr.com/web-news/will-eus-electricity-tax-plans-be-any-help-rail-freight)

Rail Baltica in Lithuania to be complete in 2034

April 2026

The Lithuanian section of Rail Baltica will only be complete by 2034. Originally scheduled for 2030, the railway across the Baltics is seriously delayed. The newest Lithuanian deadline comes from a governmental planning document, according to national media.

[Link: https://www.uirr.com/web-news/rail-baltica-lithuania-be-complete-2034](https://www.uirr.com/web-news/rail-baltica-lithuania-be-complete-2034)

First vehicle transits through the Semmering Base Tunnel

May 2026

The Semmering Base Tunnel saw its first crossing, marking a step towards completion. Running between Gloggnitz and Mürzzuschlag on the Vienna-Graz line, the 3,9 billion tunnel had its excavation finished in 2024. First trains are expected by late 2029, replacing the 1854 mountain line.

[Link: https://www.uirr.com/web-news/first-vehicle-transits-through-semmering-base-tunnel](https://www.uirr.com/web-news/first-vehicle-transits-through-semmering-base-tunnel)

Sweden to reduce track access charges for freight by 20%

May 2026

Sweden's Trafikverket will cut freight track access charges by 20% from the 2028 timetable, offering relief after a 40% increase between 2024 and 2025 that prompted a subsidy fund boost. Passenger charges will rise 15%, following a government-commissioned review of TAC calculation methods.

[Link: https://www.uirr.com/web-news/sweden-reduce-track-access-charges-freight-20](https://www.uirr.com/web-news/sweden-reduce-track-access-charges-freight-20)

Personnel News

HUPAC GROUP

01.07.2026



Britta Weber has been appointed as the new CEO of Hupac as from 1 July. She brings more than 20 years of international logistics experience. She will focus on the further strategic development of combined transport, the expansion of sustainable transport solutions and the strengthening of the Hupac market position as a leading provider of intermodal land transport in Europe. [Read more](#).

LTG CARGO

16.04.2026



Audrius Pukas who has headed the Technological Asset Management Division at LTG Cargo for the past five years, has been appointed the CEO of the Ukrainian subsidiary of LTG Cargo, the freight transport company of the LTG Group. [Read more](#)

RAIL CARGO GROUP

04.05.2026



Bettina Castillo and Christoph Grasl have jointly taken responsibility for the work of the Rail Cargo Group Executive Board. Despite numerous challenges, they see this moment as an opportunity to put Europe's second-largest rail logistics provider on a stronger and more sustainable footing for the future. [Read more](#)

FEDERAL GOVERNMENT OF GERMANY

29.07.2026



Steffen Bilger was appointed Head of the Federal Ministry of Transport. The 47-year-old lawyer knows the freight transport sector and was most recently the First Parliamentary Secretary of the CDU/CSU parliamentary group in the Bundestag. As a Minister, he is now responsible for national transport policy – which includes the construction and maintenance of motorways, main roads and bridges, as well as rail infrastructure and rail services. [Read more](#)

Members' & Partner's News

BALTIC RAIL CARGOBEAMER

- [Baltic Rail Launches New Poland-Rijeka Intermodal Rail Service](#)
- [CargoBeamer assumes terminal operations in Kaldenkirchen and advances expansion & launches new service from Stuttgart to Milan & increases Calais – Perpignan frequency to 6 weekly roundtrips](#)

CFL MULTIMODAL CONTARGO

- [Lorryrail, VIIA and CFL multimodal are partnering for a new commercial service in France](#)
- [Terminal development in Emmerich completed & Launch of the First Electric Trucks and Charging Infrastructure for Contargo North France & Contargo publishes containerLib as open source](#)

DUISPORT DUSS EAST WEST IL GPMM GYSEV CARGO HUPAC INTERPORTO BOLOGNA KTL

- [Duisport extends its reach to the Adriatic: new rail shuttle links Trieste to the European hinterland](#)
- [Two New Cranes Modernise the DUSS Terminal in Karlsruhe](#)
- [Interview of Gábor Miskolczi, CEO of EWG Rail to Hungarian trade magazine NavigátorVilág](#)
- [Disrupted Shipping Routes: Why Marseille-Fos Port Is Emerging as a Winner](#)
- [GYSEV announces the development of a new logistics centre in Sopron](#)
- [Hans-Jörg Bertschi: The benchmark must be the Road](#)
- [Verona: 750-metre train infrastructure for the Interporto hub](#)

LTG CARGO MERCITALIA METRANS NAVILAND CARGO NOVATRANS-GREENMODAL

- [LTG Cargo cleared for rail operations in Germany](#)
- [RAIL4TRUCK: New Intermodal Link Connecting Northern & Southern Italy & FS Italiane: Gianpiero Strisciuglio appointed new CEO](#)
- [METRANS announced a new connexion to the port of Koper](#)
- [Publication of the RLE CSR report on the environmental and social performance of VIIA and Naviland Cargo](#)
- [Novatrans -Greenmodal Transport partners with GCA traction to operates more trains on the Dourges-Dunkirk axle & GCA OTC strengthens its commitment to Combined Transport and decarbonisation](#)

RAIL CARGO GROUP SAMSKIP T3M ERMEWA GATX RAIL EUROPE MFD RAIL SCHMITZ CARGOBULL TRANSPOREON

- [The modernised container terminal in Přerov \(CZ\) has opened](#)
- [Samskip participated in the World Hydrogen Summit in Rotterdam](#)
- [Groupe Open Modal : T3M renforce son offre ferroviaire Valenton <> Novara.](#)
- [30 buses transported by rail from Dourges to Kyiv in only 3 weeks using 45-foot intermodal flat wagons](#)
- [20 Years of GATX Rail Europe](#)
- [MFD Rail was Awarded EcoVadis Gold Rating.](#)
- [Schmitz Cargobull wins big in ETM Awards readers' poll.](#)
- [Transporeon Launches Natural Language Search to Help Carriers Find Freight Faster.](#)

Key Dates & Events

2-9.26 –Stockholm (SE)	- Nordic seminar (UIRR-CT4EU)	28-29.10.26 –Dusseldorf (DE)	- Europe-Asia Intermodal Logistics
3-9.26 Copenhagen (DK)	- Fehmarn Belt conference	14-16.10.26 –Padova (IT)	- Green Logistics Expo
7-9.26 –Baku (AZ)	- Black and Caspian Freight Forum	20-21.10.26 –Bucharest (RO)	- Railway Days Summit
22-25.9.26 –Berlin (DE)	- InnoTrans 2026	29.10.26 –Budapest (HU)	- CT4EU-MLSZKSZ: Central Europe Intermodal Conference
22-23.9.26 –Brussels (BE)	- Trimble Insight Europe 2026 (Transporeon Summit)		
24-25.9.26 –Istanbul (TUR)	- F&L Conference	17-19.11.26 –Batumi (GE)	- Multimodal Transport & Transit Forum
28.9.-1.10.26 –Brussels (BE)	- Connecting Europe Days	25.11.26 –Bruges (BE)	- Intermodal Market Place
6-9.10.26 –Milano (IT)	- FIATA World congress	4.12.26 - online 10:00-12:30	- UIRR European Intermodal Summit