UIRR
INTERNATIONAL UNION FOR ROAD-RAIL COMBINED TRANSPORT

Combined Transport IN BRIEF

Q3.2026 | 3 November 2026



CT still experiencing harsh turbulences

*Over the past three months, the economic environment for Combined Transport has deteriorated further, recording volumes falling by **1,23%** compared to the third quarter of 2025. While several members still see some positive prospects, the overall European environment does not leave much room for optimism in the short term.*

The problems encountered are well known: infrastructure challenges, with German transport corridors only running at minimum capacity; extremely low water levels on the Rhine, leading to disruptions that also hit terminals; subpar alternative routes; and increasing track access charges. All of this coming on top of a negative economic environment, with low growth and high inflation.

Infrastructure remains the main challenge, mostly in Germany, where DB has acknowledged that the roll-out of the Generalsanierung was either too ambitious or not properly thought through. The Hannover to Berlin diversion is a perfect case in point. The diversion plan had to be redesigned because the original alternative line will not be electrified before December 2027, well after the renovation work started on 2 October 2026.

*Track access charges in Germany are still set to rise by around **12% in 2027**. This sharp increase will be overshadowed by the track access charges in 2028 set to increase by +85% for very heavy trains and +6.6% for regular trains. UIRR will assess the impact of these track access charges hikes on its members and the business, and will react accordingly. UIRR continues to claim compensations for subpar alternative routes proposed within the Generalsanierung.*

On the legislative side, the EU Commission does not seem to be conscious of the urgency of reviving rail freight, as hinted at by Transport Commissioner Apostolos Tzitzikostas in his response to MEP Ondřej Krutílek's letter (see below). This sentiment also comes in a context where the concerns of the sector have not been entirely considered regarding the Swiss NSA's wheelset requirements, despite a JNS suggesting a way forward. To change this trend, UIRR is actively promoting the elaboration of a cross-border freight strategy by the Commission that would serve as a blueprint for a future-proof, rebalanced European transport system in which intermodal transport gets a more prominent space. We acknowledge the Commission's goodwill, as evidenced by ERA's recognition that there is room for improvements in the execution of certain laws. Notably, the agency recognised that the fragmented roll-out of ERTMS has complexified the situation, and better implementation could have avoided this.

On the sector side, not all is lost. Solutions are emerging as the need for resilience is increasingly recognised. Investments are coming in, and operational innovations and trials show that the sector is not standing still. In Spain, for example, a steady flow of investment is already producing visible effects. In France, a good momentum continues to take shape while other countries recognise the importance of rail and intermodal freight in both the European transport system and its defence architecture. However, based on the sentiment reported by UIRR members, the Business Sentiment Index of the European Combined Transport Community is negative for the next twelve months.

The UIRR Galaxy has just expanded by welcoming OLTIS Group and Hit Rail as new partners!

Ralf-Charley Schultze
Director General

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UIRR Quarterly CT Performance Gauge

-1,23%
Q3.2026 / Q3.2025

Business outlook for the 12 months between

1 October 2026 – 30 September 2027



EUROPEAN INTERMODAL SUMMIT 2026

European Intermodal Summit

4 December 2026, 10:00-12:30 – Online
***Register** (free)*

5. DVZ-Konferenz KOMBINIERTER VERKEHR 24.11.2026 Hamburg

5. DVZ-Konferenz Kombinierter Verkehr
UIRR speaks

24 November, 9:00-17:00 – Hamburg
Register

Eurostat data shows rail freight keeps struggling

August 2026

European rail freight cannot seem to stop losing volumes, as the Q1 2026 data from Eurostat highlights. Total tonnes fell by 2,97% while tonne-kilometres decreased by 5,81% when compared to the same period last year.

Link: https://www.uirr.com/web-news/eurostat-data-shows-rail-freight-keeps-struggling

Zeeman cancels rail flows between the Netherlands and Spain

September 2026

Dutch 'low cost' fashion company Zeeman has interrupted its intermodal railway project to Spain which was part of a pollution reduction initiative. These were round trips with full containers transported to Spain and empty containers returned to the Netherlands. The decision to cancel the project was taken at the end of last year, so that this change in its policies is reflected in its activity report last year, published this September.

Link: https://www.uirr.com/web-news/zeeman-cancels-rail-flows

The current capacity shortage is not a temporary congestion problem

August 2026

Whilst rail freight volumes have been on a downward trend for years, the intermodal sector is still capable of growth despite the recession, partly due to the rise in deliveries of semi-trailers and replacement trailers across Europe. However, Budapest (and Hungary) are not equipped to handle such volumes on a large scale, which could become a structural competitive disadvantage for the Hungarian economy, even in the medium term.

Link: https://www.uirr.com/web-news/capacity-shortage

Hannover–Berlin works force DB to redraw freight diversion plan

September 2026

Deutsche Bahn has once again been forced to revise plans for a major corridor renovation, this time on Hannover–Berlin, after work on a parallel line fell behind schedule and eliminated a planned diversion route. The setback is the latest blow to the troubled Generalsanierung programme, which DB has now pledged to overhaul after repeated problems with long blockades and inadequate alternative routes.

Link: https://www.uirr.com/web-news/hannover-berlin-works-force-db-redraw-freight-diversion-plan

German rail operator wants sharply higher access tariffs for freight transport

August 2026

Access to German rail will become more expensive for freight carriers in 2027. At least, if administrator DB InfraGO gets his way. The company has applied for an increase of 12,6 percent of the usage rates for standard freight transport for the coming timetable year. Still, the final mileage price is likely to remain unclear until the last minute.

Link: https://www.uirr.com/web-news/db-infrago-higher-access-fees-freight-transport

Germany's heaviest freight trains face 85% track access increase in 2028

October 2026

Transporting steel, chemicals and other heavy industrial goods by rail in Germany could become substantially more expensive in 2028.The 2028 tariffs are not yet final. DB InfraGO has stated that its application remains provisional because the level of federal maintenance funding and the regulatory cost ceiling have not been determined.

Link: https://www.uirr.com/web-news/germany-2028-85-track-access-increase-heaviest-freight-trains

Europe's rail freight problems are immediate, Commission's solutions are not

August 2026

A few months ago, Czech MEP Ondřej Krutílek asked the European Commission to explain why rail freight is struggling and what is being done to stop the bleeding. Transport Commissioner Apostolos Tzitzikostas finally responded with a half a page letter that still leaves a few unanswered questions, especially about immediate relief.

Link: https://www.uirr.com/web-news/europes-rail-freight-problems-are-immediate

'It's not ERTMS's fault, it's ours': ERA chief admits

October 2026

The European Union Agency for Railways has admitted that ERTMS specifications were incorporated into EU law before they were ready, contributing to the proliferation of national variants and repeated technical changes. "It's not the fault of ERTMS, it's our fault", said ERA chief Oana Gherghinescu, calling for mature specifications to be frozen so the industry can finally deploy the system at scale.

Link: https://www.uirr.com/web-news/ertms-fragmented-roll-out

What's new in the latest ERA wheel regulation report

August 2026

The diatribe between Switzerland and the EU on the wheels of rail freight wagons has recently developed in favour of the latter. In addition to a Swiss court ruling against the new regulations, the Joint Network Secretariat (JNS) of the European Agency for Railways (ERA) updated its report, providing continent-wide guidelines.

Link: https://www.uirr.com/web-news/era-wheel-regulation-report

Trucking could be 120+ times more dangerous than rail freight'

August 2026

Occasionally, rail freight safety is subject to severe public scrutiny. This is particularly true when talking about dangerous or hazardous freight, where rail operations are often seen as detrimental to public security. The same cannot be said for the road sector, but that could be a great misconception.

Link: https://www.uirr.com/web-news/trucking-could-be-120-times-more-dangerous-rail-freight

DB Cargo and Captrain respond to logistics problems on the Rhine

August 2026

To alleviate the lack of capacity due to low water level on the Rhine, Captrain Deutschland added three to four weekly services between Wilhelmshaven and the Ruhr, mainly for coal, and DB Cargo announced the mobilisation of some 400 additional wagons. Yet; with better planification, more rail capacity could have been mobilised. Allianz pro Schiene reminded us that since low water is becoming the norm in summer a better preparation is needed for future resilience.

Link: https://www.uirr.com/web-news/logistics-problems-on-rhine & https://www.uirr.com/web-news/low-water-levels-on-germanys-rivers & https://www.uirr.com/web-news/drought-on-waterways-shippers-demand-eu-contingency-plan

€100m BASF expansion of German multimodal hub as Rhine crisis deepens

August 2026

German chemicals group BASF has started work on a €100 million-plus upgrade of its Ludwigshafen facility KTL, one of Germany's largest multimodal terminals. With completion scheduled for 2028, the project is set to significantly boost handling capacity, including for third-party forwarders and shippers — an increasingly relevant prospect amid the low-water crisis on the Rhine.

Link: https://www.uirr.com/web-news/basf-eu100m-expansion-key-german-multimodal-hub

DB Cargo secures 30% more capacity with smart locomotives placement

September 2026

The German national rail freight operator DB Cargo is increasing its industrial transport capacity between Germany and Austria by up to 30%. It does so while operating the same number of trains. The so-called Distributed Power System (DPS) enables the capacity gain.

Link: https://www.uirr.com/web-news/db-cargo-30-more-capacity-locomotives-trains-front-and-rear-end

Barcelona Port expands terminal, new south rail access still in development

September 2026

The two new cranes can handle vessels 26 containers wide and provide 55 metres of clearance under the spreader. BEST now has 15 Super Post-Panamax quay cranes along its 1.500-metre berthing line.

Link: https://www.uirr.com/web-news/barcelona-expands-best-terminal; https://www.uirr.com/web-news/spain-subsidy-plan-revive-railway-sector

Switzerland tries to keep goods on rail: €515 m for transport through the Alps

August 2026

Switzerland wants to extend until 2035 the financial support for rail freight through the Alps, after the share of the railway fell for the fourth consecutive year. BLS Cargo supports the measure and warns that work, closing lines and rising costs are causing significant losses to railway operators.

Link: https://www.uirr.com/web-news/switzerland-tries-keep-goods-on-railway

Russia and China are working on driverless cross-border rail freight

September 2026

Russia and China are planning to build a driverless cross-border container rail system in the Far East. The countries are jointly developing the necessary tech under official supervision. However, they want private investors to fund it all.

Link: https://www.uirr.com/web-news/russia-and-china-driverless-cross-border-rail-freight

The Netherlands seeks rail partners for military transport

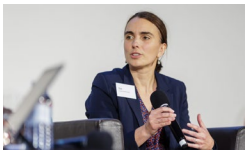
September 2026

The Dutch Ministry of Defence is looking for rail companies to support its logistics. It is after partners that can organise transportation of ammunition, construction materials, fuel, vehicles and other military equipment across Europe by rail.

Link: https://www.uirr.com/web-news/netherlands-seeks-rail-partners-military-transport

Personnel News

DG MOVE
01.10.2026



Kathrin Obst was officially appointed Head of Unit for the Single European Railway Area (DG MOVE Unit C.3) within the EU Commission, where she previously served as Deputy Head of Unit. Succeeding Sandro Santamato, she leads EU rail transport policy, focusing on market integration, cross-border connectivity, passenger rights, and seamless ticketing. Her career includes prior leadership roles as Director of the European Federation of Inland Ports EFIP and Senior Policy Adviser at CER.

CARGOBEAMER
01.08.2026



The Executive Board has been reorganised to drive the next European growth phase. Dr. Markus Fischer (CFO since 2016) has been appointed CEO while retaining his CFO responsibilities, succeeding Nicolas Albrecht, who moves to Chairman of the Supervisory Board. The operational leadership is completed by Tilman Apitzsch as CCO (combining commercial and operational functions) and Julian Hagenschulte as Chief Digital & Technology Officer, positioning the company to scale its European network and terminal expansions. LINK

JOHN G. RUSSELL
01.08.2026



David Weir was appointed as Transport Director at John G. Russell (Transport) Ltd. He brings extensive expertise in fleet management, supply chain strategy, and operational compliance. Throughout his career with the Russell Group, he has focused on driving continuous improvement, optimising transport schedules, and enhancing logistics performance across large-scale depot networks.

HGK
01.10.2026



Alexander Garbar, former Head of Corporate Development and Strategy at Duisport, has joined HGK. At Duisport, Garbar helped drive strategic initiatives, sustainable logistics practices, and corporate development for one of Europe's largest inland ports. In his new role at HGK, he brings extensive industry experience and strategic expertise to help lead the group's continued expansion, innovation, and green logistics transformation.

Members' & Partner's News in Q3.2026

AFLUENT ARAD	-	AFLUENT Arad's intermodal terminal marked five years
AMBROGIO TRASPORTI	-	Ambrogio wins at the Ship2shore awards 2026
CARGOBEAMER	-	CargoBeamer expands three routes in Germany, Italy, and France
CFL TERMINALS	-	CFL Terminals announced the launch of the new connection between Bettembourg-Dudelange and Wroclaw
CLIP GROUP	-	CLIP Group secured financing to develop its Zabrze intermodal terminal & Opening of the South Poland Terminal Zabrze
DELTA RAIL	-	DELTA Rail continues to develop its network with a new direct rail link between Dunkirk and Lyon
DUISPORT	-	Duisport signed a Memorandum of Understanding with Arkas Holding and Mars Logistics
GYSEV CARGO	-	Gysev Cargo celebrated its 15th anniversary
HUPAC	-	Hupac publishes the new Sustainability Report for 2025
JOHN G RUSSELL	-	JGR becomes first operator to put hydrogen fuel-cell electric vehicles (FCEV) into its daily operations in the UK with Scania
KTL	-	BASF and KTL broke ground on a €100+ million expansion of the Ludwigshafen combined transport terminal
LUGO TERMINAL	-	Lugo participated in the Fermerci incontra conference on 7 July
MERCITALIA / FS LOGISTIX	-	Departures on its rail link between Sweden and Italy increased to 2 weekly
METRANS	-	METRANS has completed the extensive expansion of its terminal in Poznań/Gadki (PL)
RAIL CARGO GROUP	-	RCG is expanding and modernising its fleet of wagons for the transport of light metal scrap and sheared scrap
SAMSKIP	-	Samskip brings its pioneering SeaShuttle project into the European HyShip initiative
T3M	-	T3M evolved its rail service offering on the Mediterranean route with an improvement to its Bonneuil <> Miramas 2 service
TERMINALI ITALIA	-	Terminali Italia will manage the Orte Intermodal Terminal starting in January 2027
TSA/ÖBB INFRA	-	Wolfurt Terminal is upgrading its crane with a new 24 kV power connection and remote-control capability
VAN DER VLIST	-	Van der Vlist UK proudly marked its 25th anniversary
WIENCONT	-	A new full-container handler is strengthening WienCont's fleet and is already successfully in operation
PARTNERS		
ERMEWA	-	Ermewa is celebrating its 70th anniversary
GREENBRIER EUROPE	-	Greenbrier Europe and TX Logistik agreed to produce and lease the NIK (Neutral Intermodal Key) handling system
MENLO 79	-	Menlo79 won the Railway Innovation Award 2026 in the #Operations & #Performance category
SCHMITZ CARGOBULL	-	Schmitz Cargobull takes 1st place for its S.CU ePTO ready transport refrigeration unit & awarded the International Trailer Award 2027
TATRAVAGONKA	-	Tatravagonka receives the National Productivity Award
UNIT45	-	Unit45 successfully delivers 165 new 20ft food-dedicated dry bulk bag-in-box containers for BLS Food
VTG	-	VTG has entered into a definitive agreement to sell all shares in VTG Rail UK

Key Dates & Events

- ESPO Award ceremony and dinner – *10 November, Brussels (BE)*
- CombiNet: Annual Conference – *12 November, Vienna (AT)*
- Alice logistics innovation summit – *17-18 November, Brussels (BE)*
- F&L Event – *18-19 November, Gothenburg (SE)*
- FERRMED Conference – *19 November, Brussels (BE)*
- 5. DVZ Konferenz Kombinierter Verkehr – *24 November, Hamburg (DE)*
- Port of Antwerp Bruges: Intermodal Market Place – *25 November, Bruges (BE)*
- RailFreight Week: 7 webinars – *23-26 November, online*
- EBU Annual event – *2 December, Brussels (BE)*
- Railtalks Need for Speed event – *2 December, Berlin (DE)*
- Multi-Level Dialogue on Just Transition – *3 December, Brussels (BE)*
- CT4EU-UIRR European Intermodal Summit – *4 December, online*
- RDL Multimodal Transport, Transit & Investment Forum – *10 December, Tbilisi (GE)*
- 2nd Indo Mediterranean Business Forum – *11-12 December, Trieste (IT)*