Data on intermodal transport and why it is important?

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Maria Koidu, DG MOVE

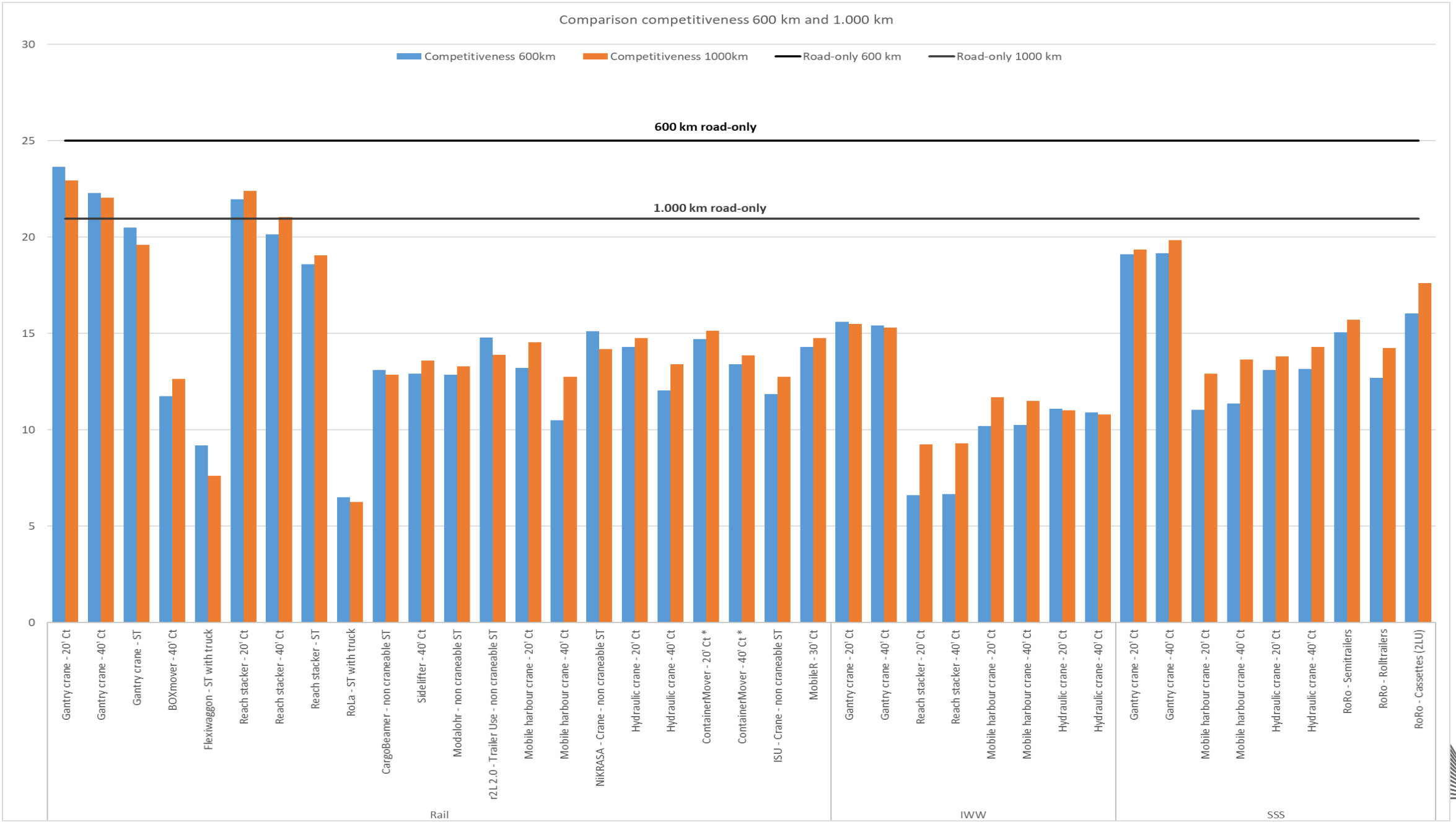
European Commission

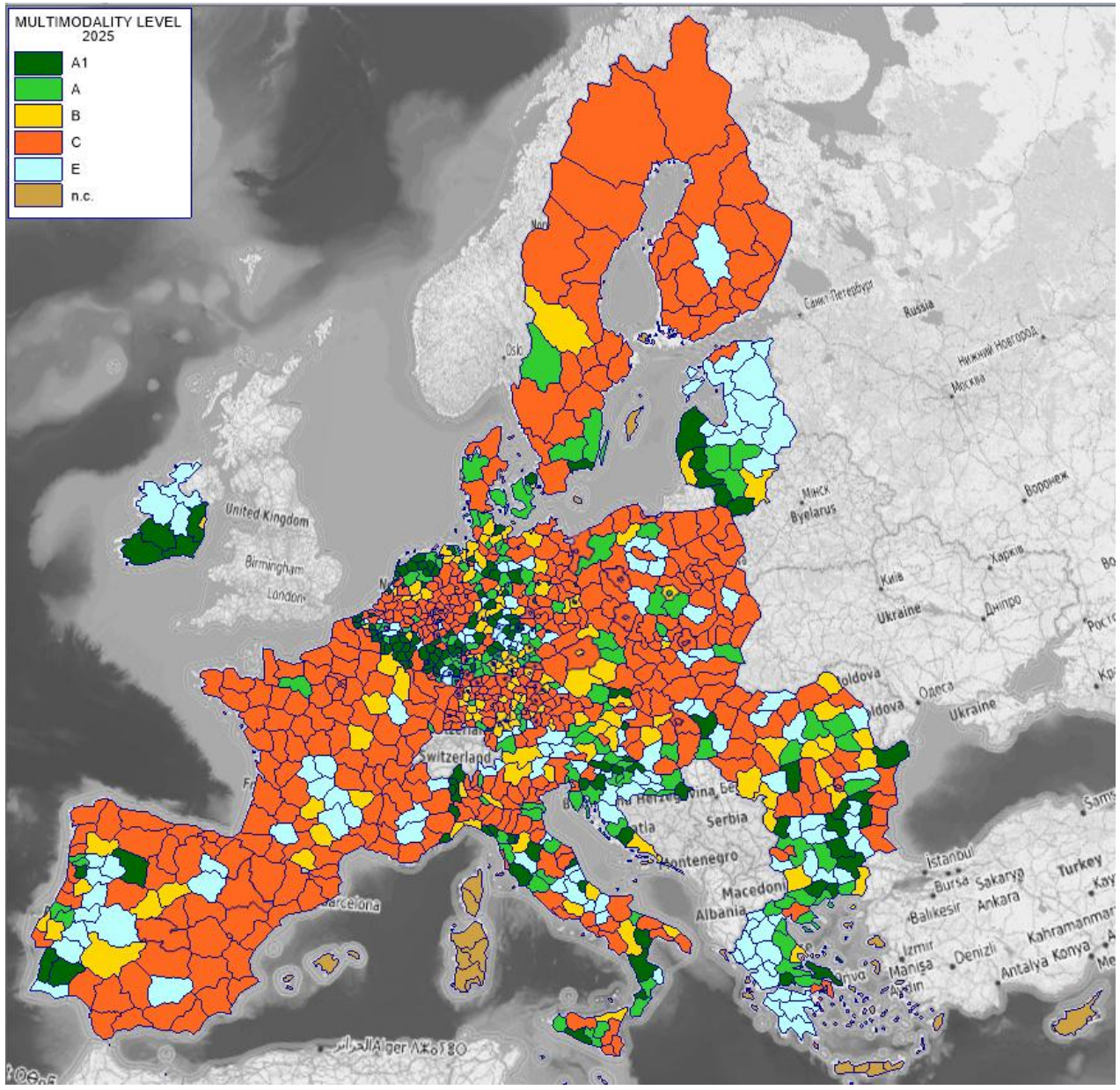
Intermodal and combined transport data

- Policy driven data needs:
  - Important to understand trends compared to road-only transport and total transport -> is support still needed
  - Important to understand trends to assess effectiveness of support measures - > is support sufficient
- Reporting obligation in the Combined Transport Directive
- 3 official reports 1993, 1997, 2002 covering years 1987-1999.
- Eurostat data has major gaps.
- From 2014, Commission has used external studies in 2014, 2017, 2022, 2026, covering years from 2011.
- Currently the latest study is ongoing, which will feed - together with other sources - to a new official report under Combined Transport Article 5, expected Q2 2027

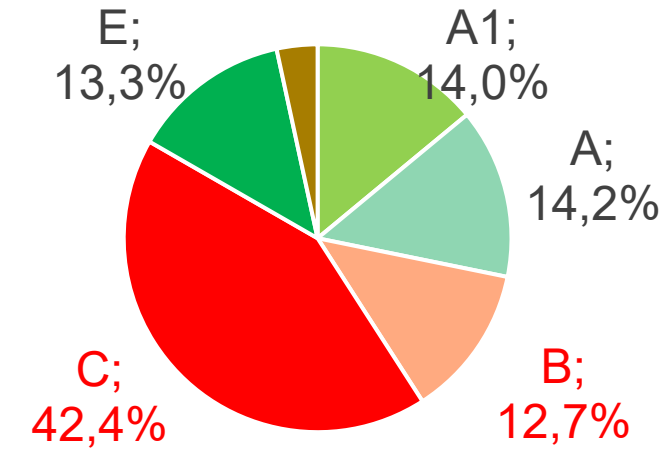
Data needs

- **Performance/volumes and relative importance, trends (intermodal, combined transport, different modes),**
- **Total system costs, external cost creation comparisons**
- **Comparison of different modal combinations, transhipment technologies, units, vessels and vehicles used**
- **Real life distances of different leg**
- **Transhipments, terminals**
- **Market structures, business models etc**
- **Prices, efficiency and competitiveness**
- **Support measures used by MS**
- **What hinders take-up**
- **Innovations**
- **Projections**


Comparison competitiveness 600 km and 1.000 km
Competitiveness 600km
Competitiveness 1000km
Road-only 600 km
Road-only 1000 km
600 km road-only
1.000 km road-only
30
25
20
15
10
5
0
Gantry crane - 20' Ct
Gantry crane - 40' Ct
Gantry crane - ST
BOXmover - 40' Ct
Flexiwaggon - ST with truck
Reach stacker - 20' Ct
Reach stacker - 40' Ct
Reach stacker - ST
RoLa - ST with truck
CargoBeamer - non craneable ST
Sidelifter - 40' Ct
Modalohr - non craneable ST
r2L2.0 - Trailer Use - non craneable ST
Mobile harbour crane - 20' Ct
Mobile harbour crane - 40' Ct
NiKRASA - Crane - non craneable ST
Hydraulic crane - 20' Ct
Hydraulic crane - 40' Ct
ContainerMover - 20' Ct *
ContainerMover - 40' Ct *
ISU - Crane - non craneable ST
MobileR - 30' Ct
Gantry crane - 20' Ct
Gantry crane - 40' Ct
Reach stacker - 20' Ct
Reach stacker - 40' Ct
Mobile harbour crane - 20' Ct
Mobile harbour crane - 40' Ct
Hydraulic crane - 20' Ct
Hydraulic crane - 40' Ct
Gantry crane - 20' Ct
Gantry crane - 40' Ct
Mobile harbour crane - 20' Ct
Mobile harbour crane - 40' Ct
Hydraulic crane - 20' Ct
Hydraulic crane - 40' Ct
RoRo - Semitrailers
RoRo - Rolltrailers
RoRo - Cassettes (2LU)
Rail
IWW
SSS



- B- more than 500 000t/y
- C – more than 800 000 t/y

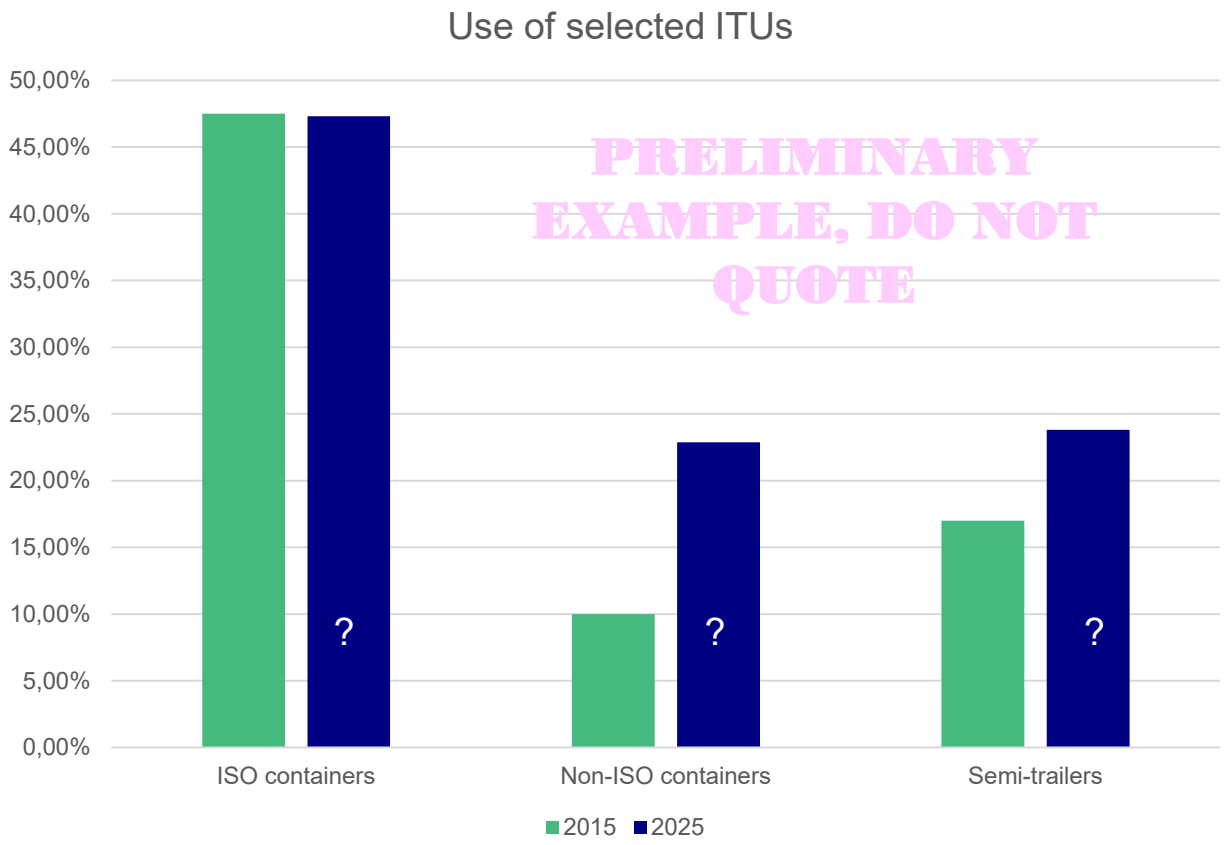


- 22% of NUTS3 zones have no reasonable access to a terminal
- 20% of level C zones have competing road volumes >5 times 800 000t
- More than half of EU NUTS3 zones may need investment in terminals.
- Current plans for capacity increase? +18% by 2030

Current study looks into

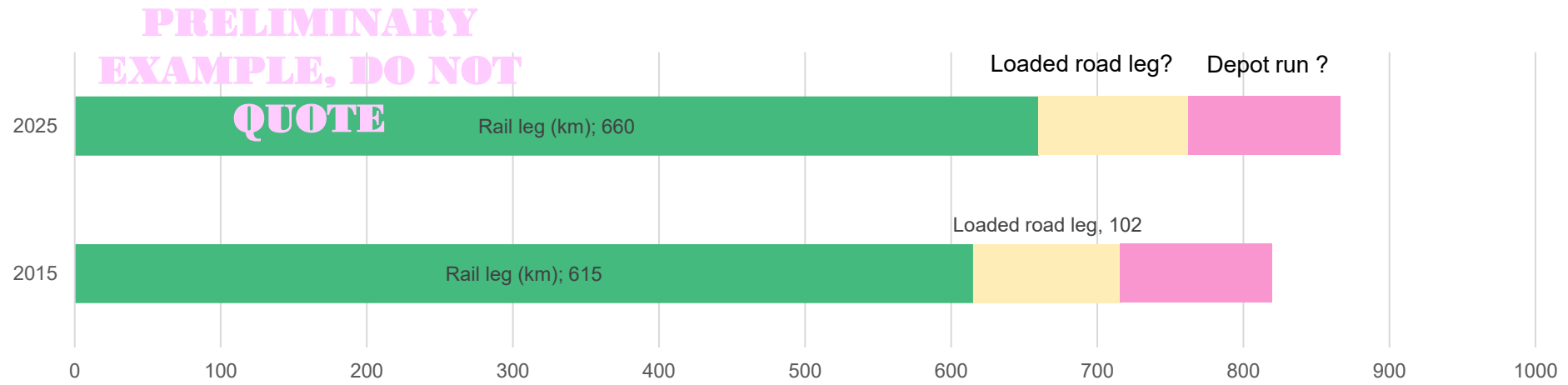
- Performance (volumes) and main routes, all modal combination and different segments
- Equipment (loading units, vehicles, vessels) and services
- Energy use
- Distances
- Transhipments
- Price competitiveness
- Terminals and terminal information
- Innovations

Loading units



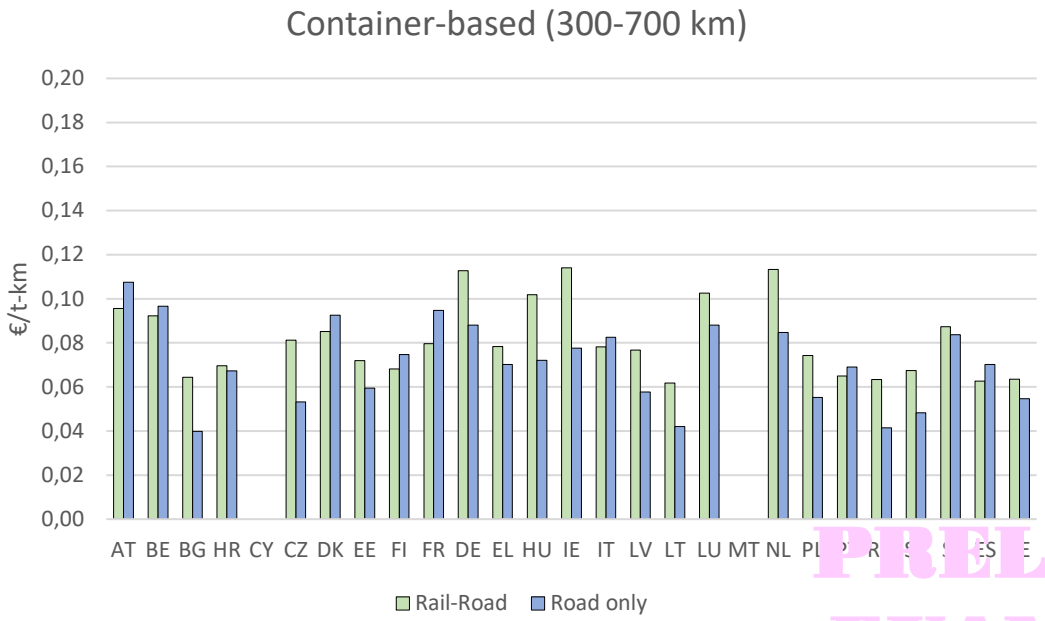
- Strong lobby for semitrailers on rail in recent years
- In 2015, 85% of semitrailers in intermodal were on ferries
- Our 2025 data not yet verified for rail, but preliminary data on waterborne transport does not show change for container vrs semitrailers share. Within containers, increase of 40 feet containers.
- UIRR data shows semitrailers have decreased its share 1%, so why does Industry claim opposite?

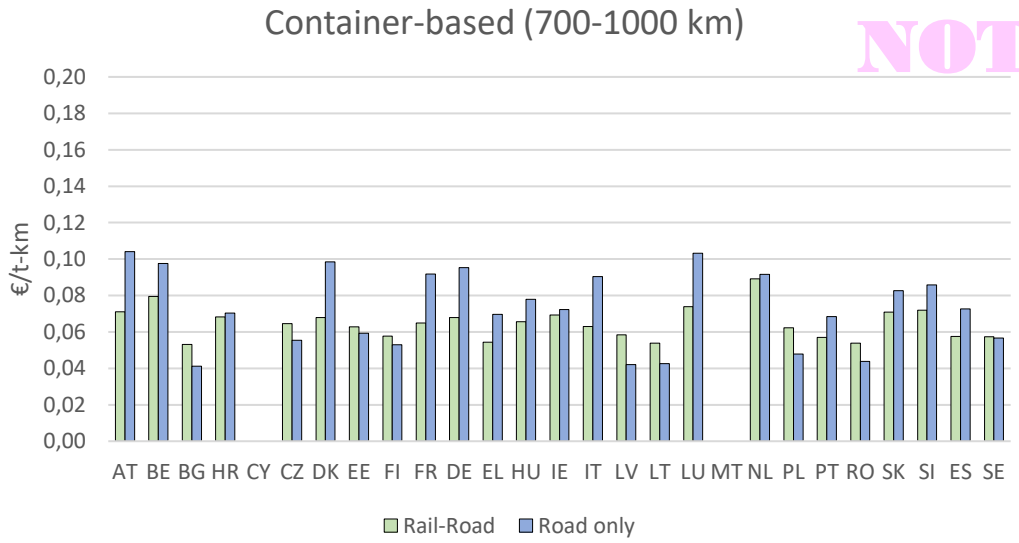
Distances of different legs in intermodal

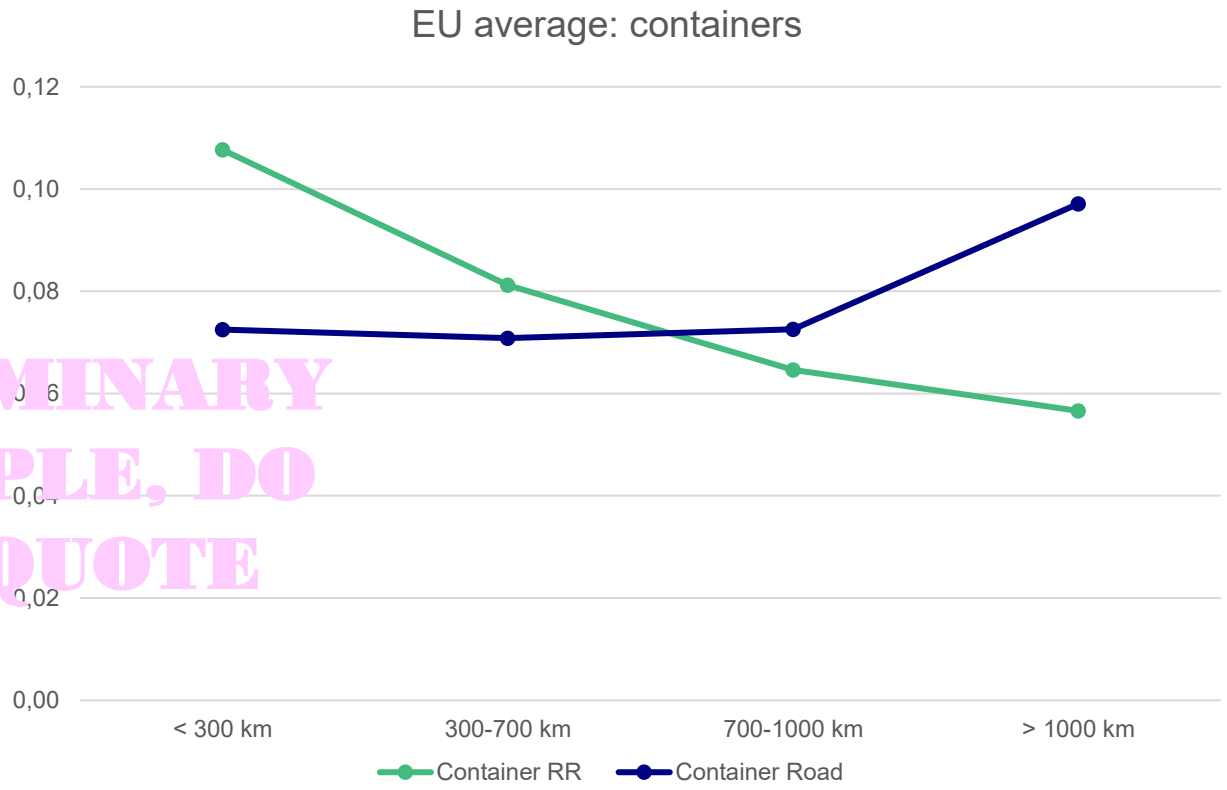


- No data yet on road legs in current study. Length, how often 1 or 2 loaded legs
- Depot runs? How often, distances, 1 or 2? No data collected in 2015
- Needed for total volumes and for legislation: what are the actual distances (road in particular), what is the share of rail to total road within intermodal transport?

Rail-road intermodal container transport D2D price paid by shipper (preliminary)







PRELIMINARY EXAMPLE, DO NOT QUOTE

Sources

- market studies (2014, 2017, 2026),
- transhipment technologies study (2022),
- various mode specific studies
- transhipment study (2022),
- terminal study (2026),
- TEN-T corridor studies (2026)
- stakeholder consultations (2014, 2017, 2026),
- study on Article 4 (2021),
- DG COMP study on rail transport (2025)
- stakeholder (incl Member States) studies
- academic studies,
- external cost study (Handbook)
- impact assessments and projections

Thank you



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