

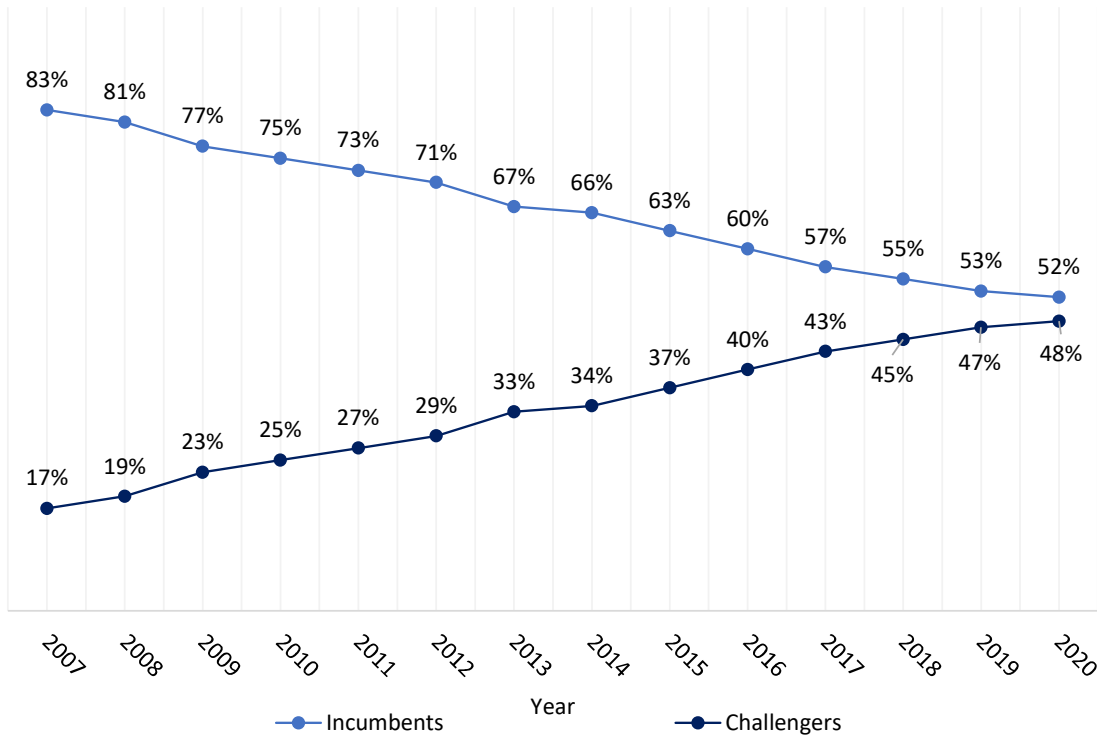


The Voice of Private and Independent Rail Freight Companies

Reinforcing the Synergies
between the Railway
Sector and the Ports –
22 June 2022



Volumes Carried by Rail Freight



Source: IRG Rail Market Monitoring Report 2020; ECM Ventures Analysis

- High Level of Competition between National Incumbents and Challengers in European Rail Freight Market
- Trend over past 15 years has been towards more diversification in the market
- Clear differences between rail freight and passenger markets
- Essential to look at segments of railway sector separately



National Profiles



Country	National Incumbent	Foreign Operations of Incumbents	International New Entrants	National New Entrants
	DB Cargo	DB Cargo	RheinCargo	VTG, HSL, RTB CARGO
	FRET SNCF	CAPTRAIN		EUROPORTE
	PKPCARGO	PKPCARGO		LOTOS Kolej, CTL LOGISTICS
	MERCITALIA RAIL GRUPPO FERROVIE DELLO STATO ITALIANE	TXLOGISTIK		Rail Traction Company
	renfe Mercancías		MEDWAY Transporte & Logística	
	Rail Cargo Group	Rail Cargo Group	LTE logistics & transport	CargoServ, WLC
	SBB Cargo	SBB Cargo International	bls cargo	railCare
	n.a.			ERS Railways
	n.a.		LINEAS YOUR FREIGHT FORCE	
	Cargo		METRANS	
	n.a.			
	ZBSK CARGO			CER, RTI RAILTRANS INTERNATIONAL
	green cargo		HECTORRAIL	LKAB

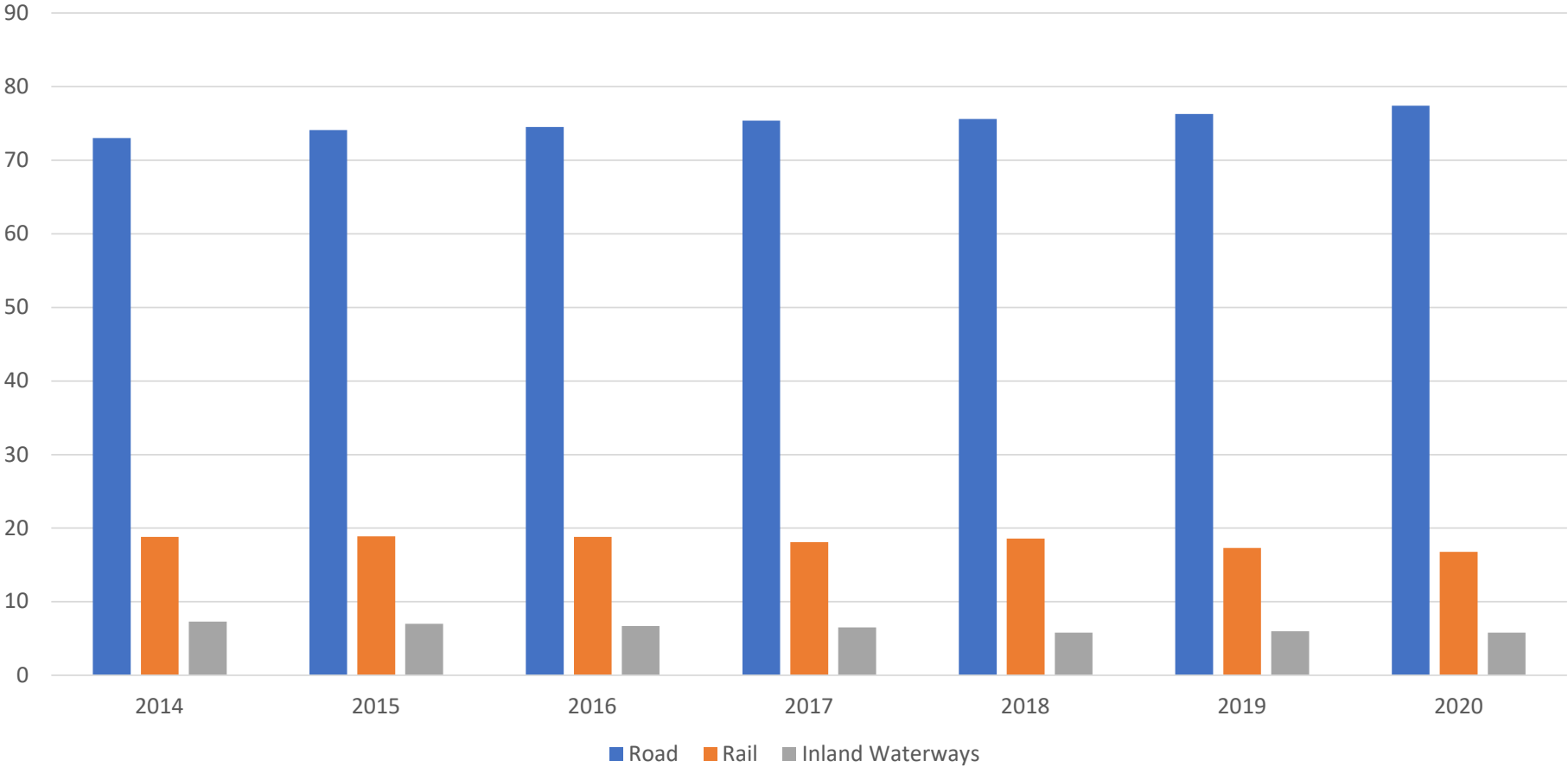
- As already outlined, European rail freight market highly diversified
- Four main types of operators – National Incumbents, Foreign Operations of Incumbents, International New Entrants and National New Entrants



Volumes Carried by Rail Freight



Modal Share by Mode



Development of Intermodal



2008

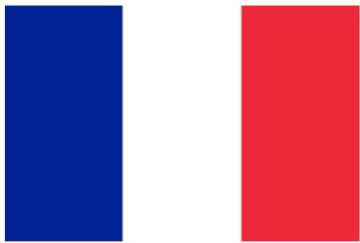
2018



37mil tonnes



47mil tonnes



8mil tonnes



12mil tonnes



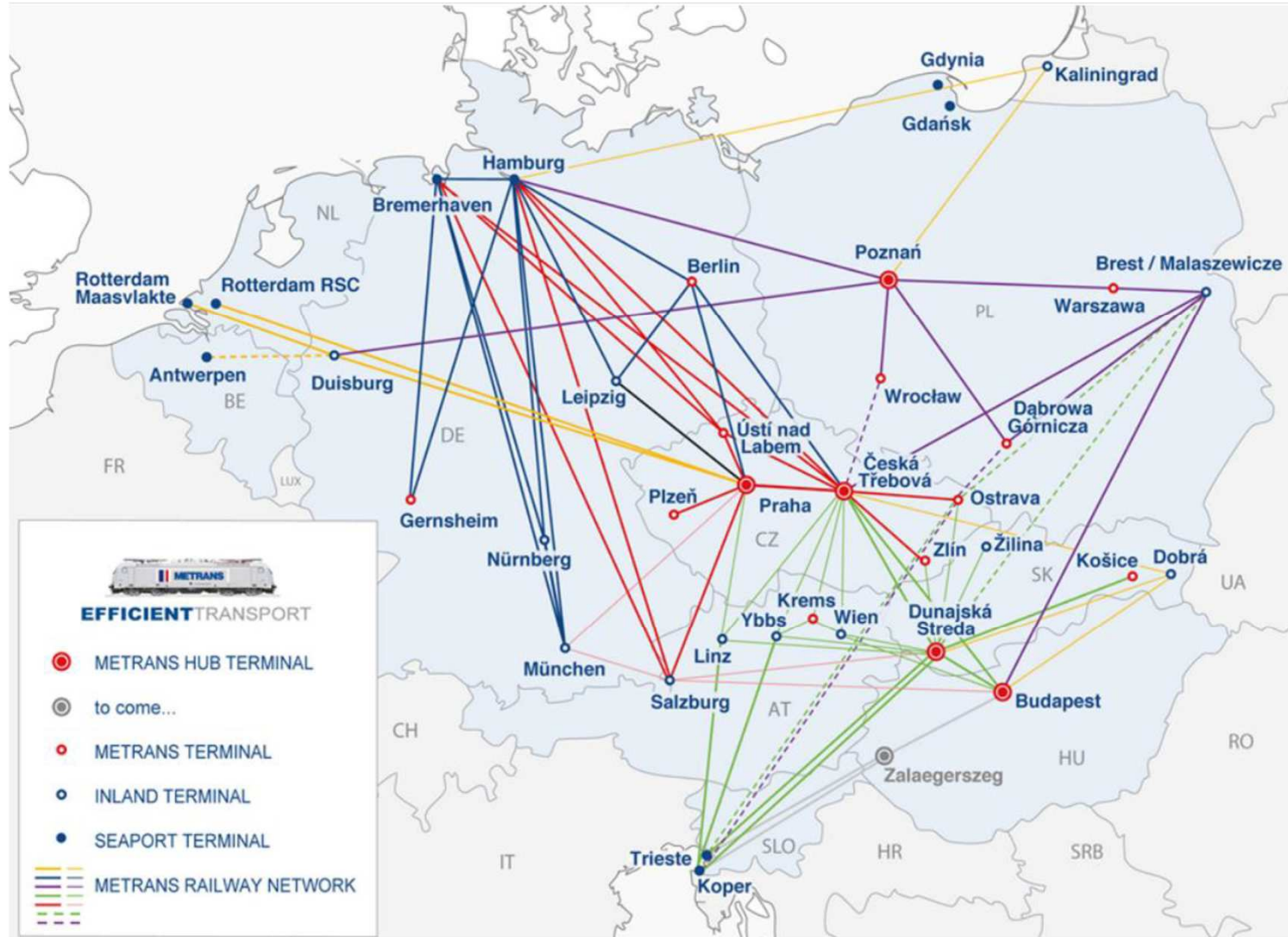
9mil tonnes



12mil tonnes



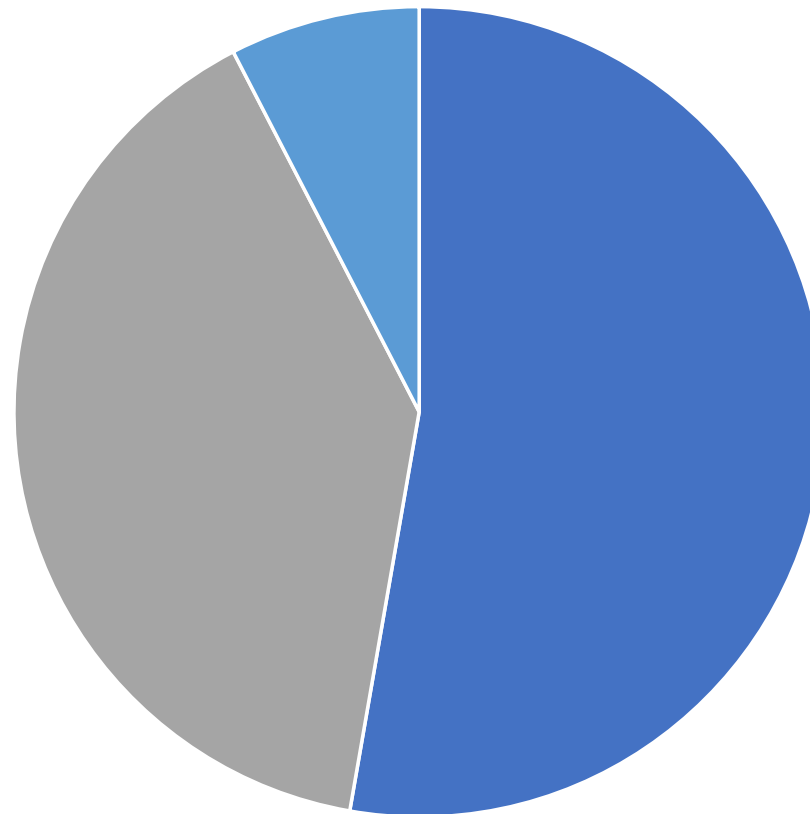
Example: Germany



Port of Hamburg



Share of Modes of Transport by Tonne



■ Rail ■ Road ■ Inland Waterways



Why it is Important



Key Points



- Rail Freight volumes have been declining for some years – strong growth in intermodal volumes however.
- This can also be seen in competition between rail freight operators. Very strong growth in new market entrants and challengers who often focus on intermodal/blocktrain traffic.
- Not all countries the same. High volumes in some countries (DE). Strong growth potential in other countries. Almost all EU Member States recording growth in intermodal market.
- Direct link between strong intermodal rail freight market and rail connections with ports. Strong synergies essential to growth.





**Thank you
for your
attention!**

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