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## Developing Infrastructure and Operating Models for Intermodal Shift (DIOMIS 2)

# Intermodal Rail/Road Transport In Europe 2007

Paris – 10 March 2009



UNION INTERNATIONALE DES CHEMINS DE FER  
INTERNATIONALER EISENBAHNVERBAND  
INTERNATIONAL UNION OF RAILWAYS

- To deliver evidence of the importance of the intermodal industry in Europe to economic and political stakeholders: “Only what you can count has relevance”
- To provide market data for the intermodal industry itself to be used for internal and political purposes
- To establish a time series on the evolution of the intermodal industry (2<sup>nd</sup> edition after the pioneering 2005 report)

# Schedule of presentation

- Intermodal market data 2007
- Intermodal traffic 2007
- Outlook for intermodal traffic 2008/2009



# Intermodal market data

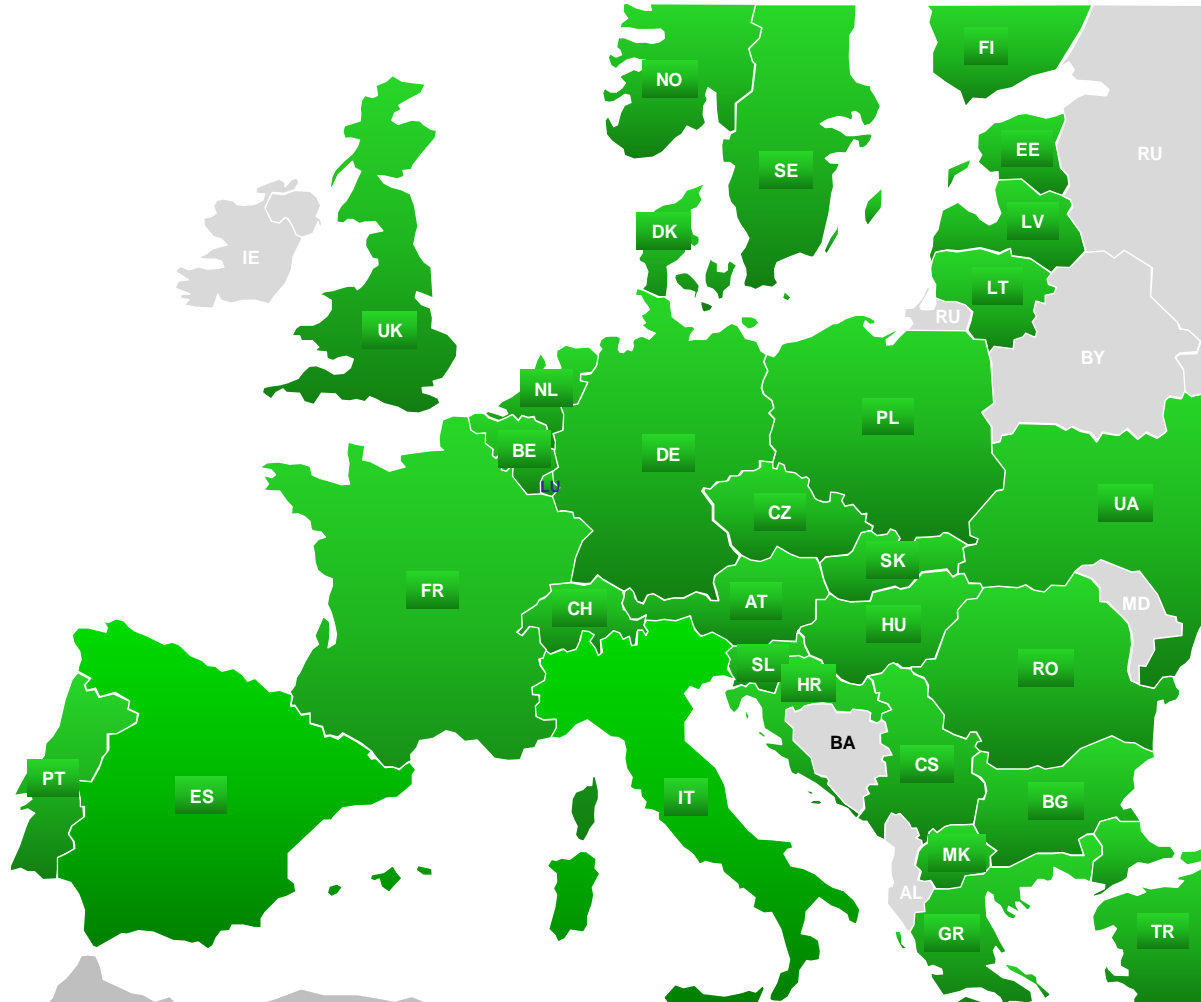


# Countries covered by 2007 survey



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**K+P**  
Transport Consultants  
Hans-Paul Kenzler



2008-07-01  
Chart 5

## Providers of unaccompanied intermodal services

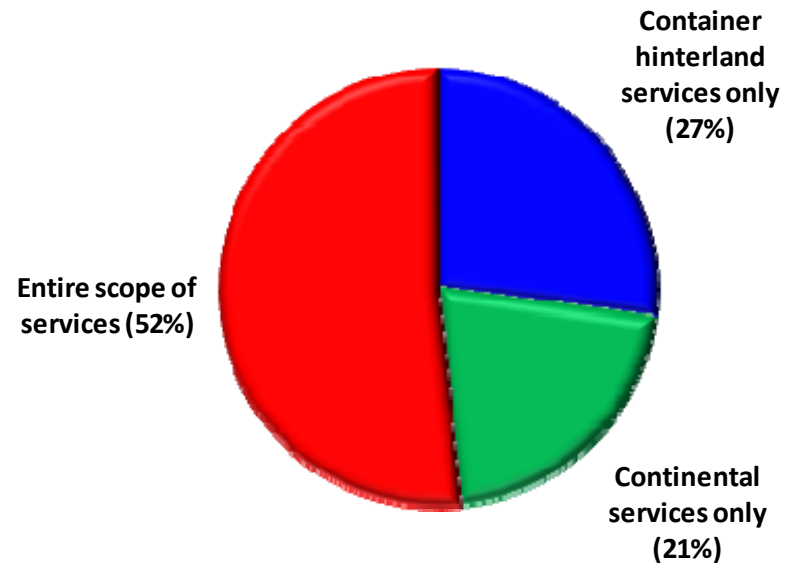
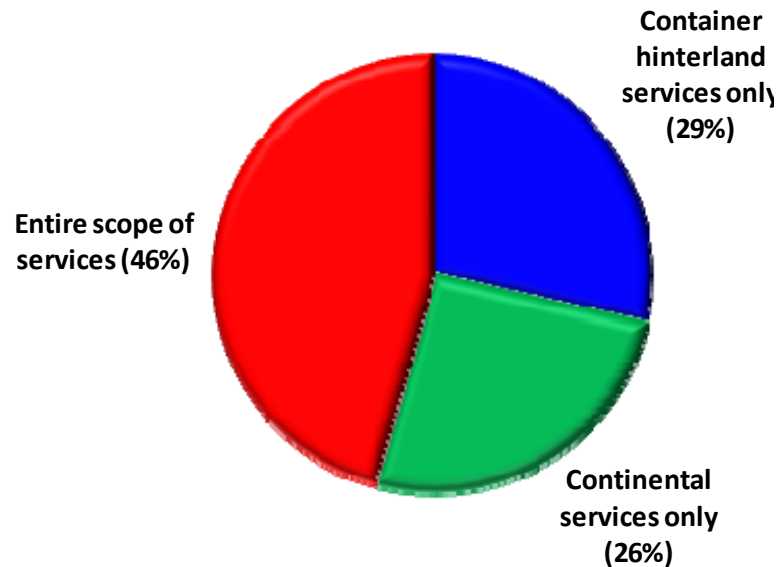
- Min. 105 intermodal service providers
  - Generalist (classical) intermodal operators: ca. 40%
  - Railway undertakings in operator role: ca. 30%
  - Logistic service providers in operator role: ca. 30%



## Scope of services of intermodal service providers

by number of companies per class

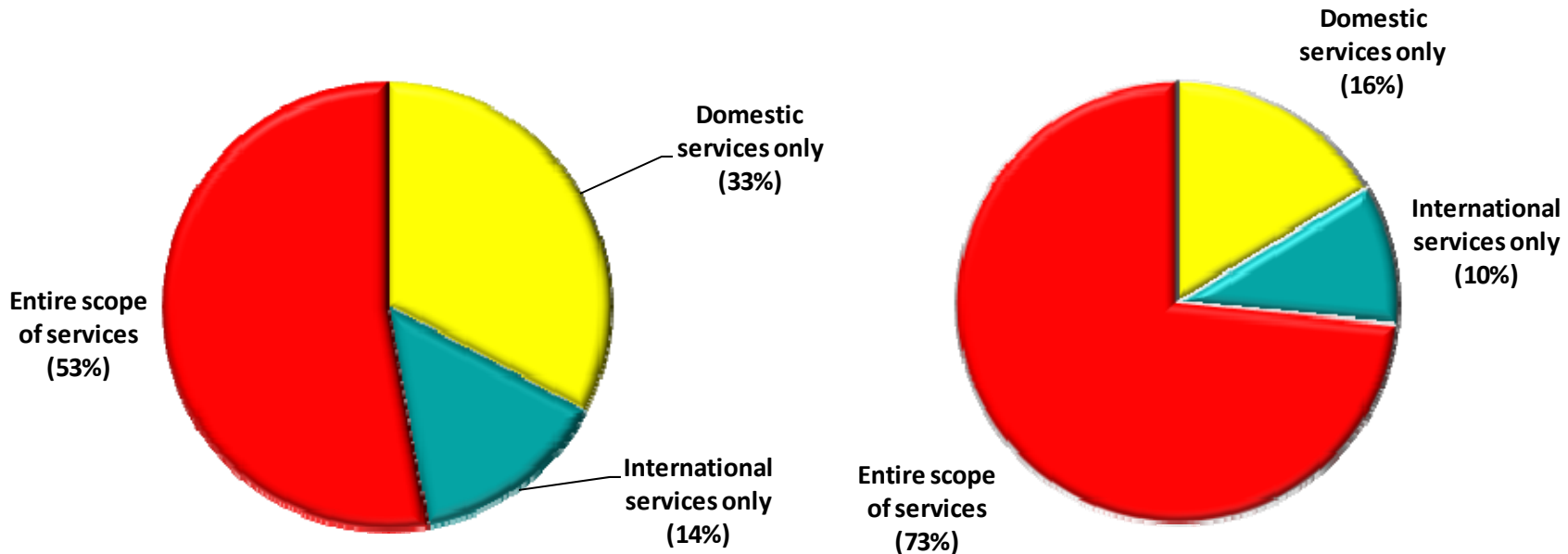
by companies per class weighted according to TEU volume



## Scope of services of intermodal service providers

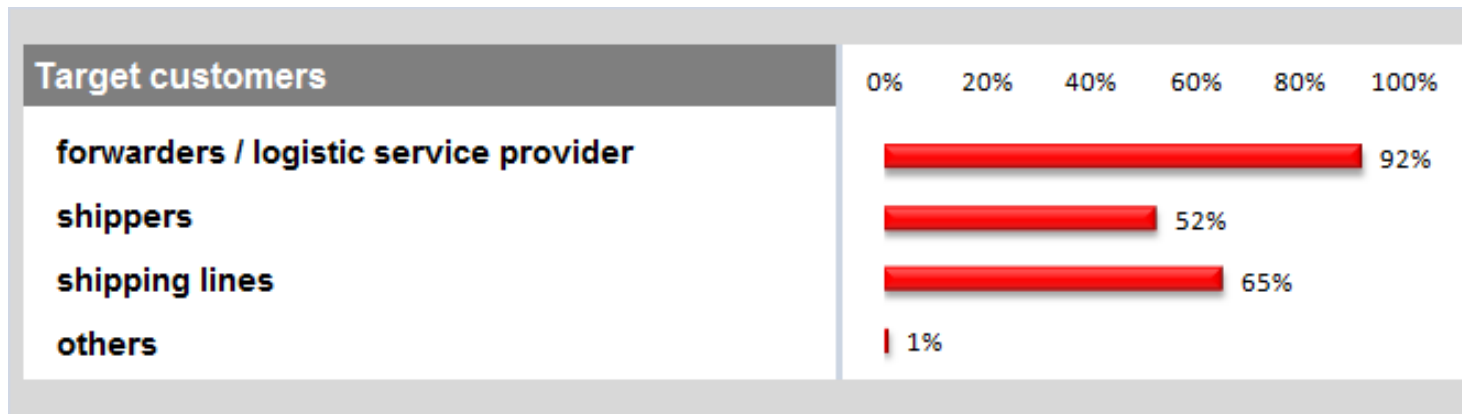
by number of companies per class

by companies per class weighted according to TEU volume





## Importance of target customer groups



## Revenues from intermodal rail/road services

**Intermodal revenues 2007**

**€ 5.205 bn**

**Average revenue: €304 per TEU**

## Employment in intermodal rail/road industry

Staff with	Number of employees		
	Reported figures	Estimated additional	Total
Intermodal service providers	6,143	2,891	9,034
Train operating companies	660	6,554	7,214
Infrastructure managers	-	15,634	15,634
<b>Total</b>	<b>6,803</b>	<b>25,079</b>	<b>31,882</b>

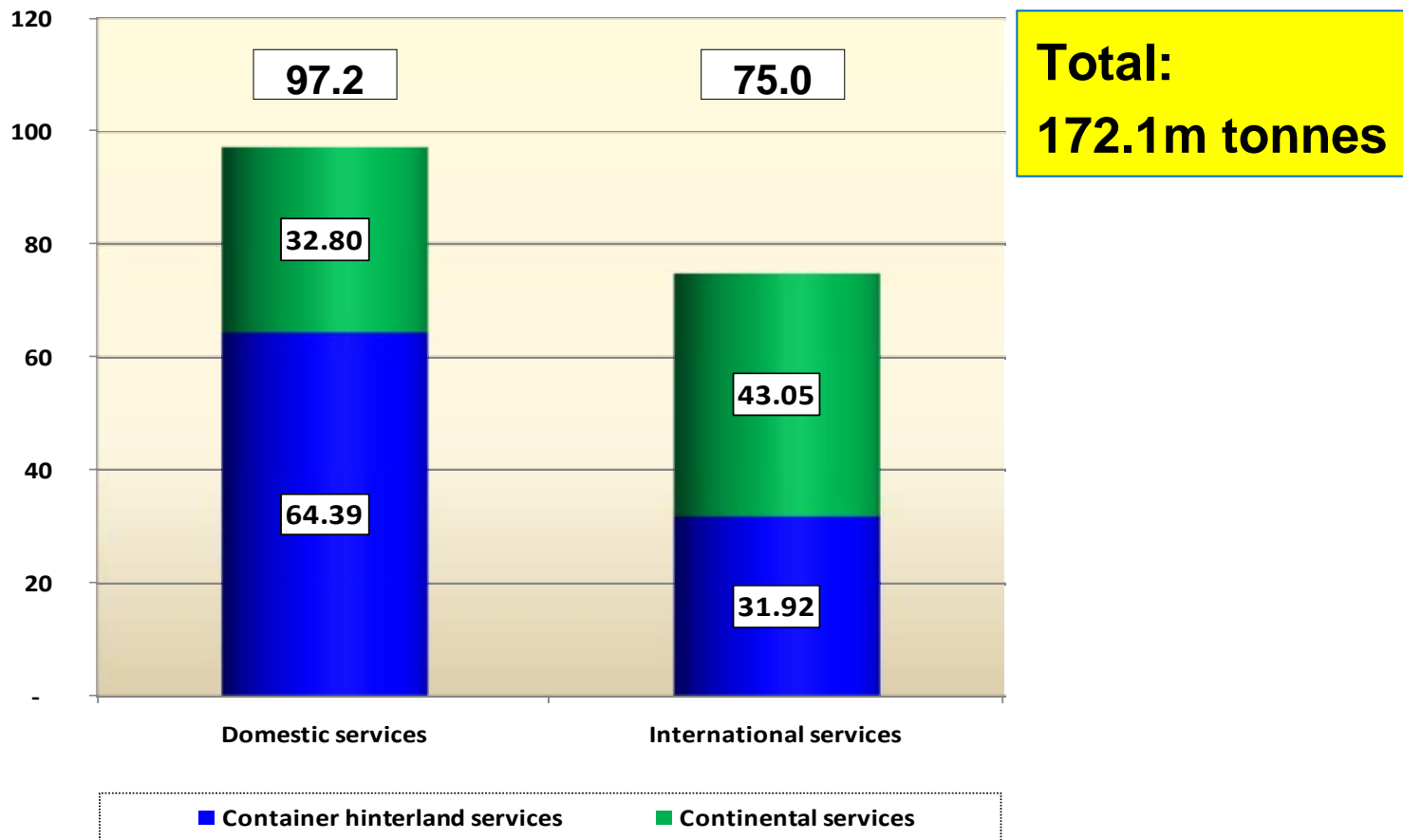


# Intermodal traffic 2007



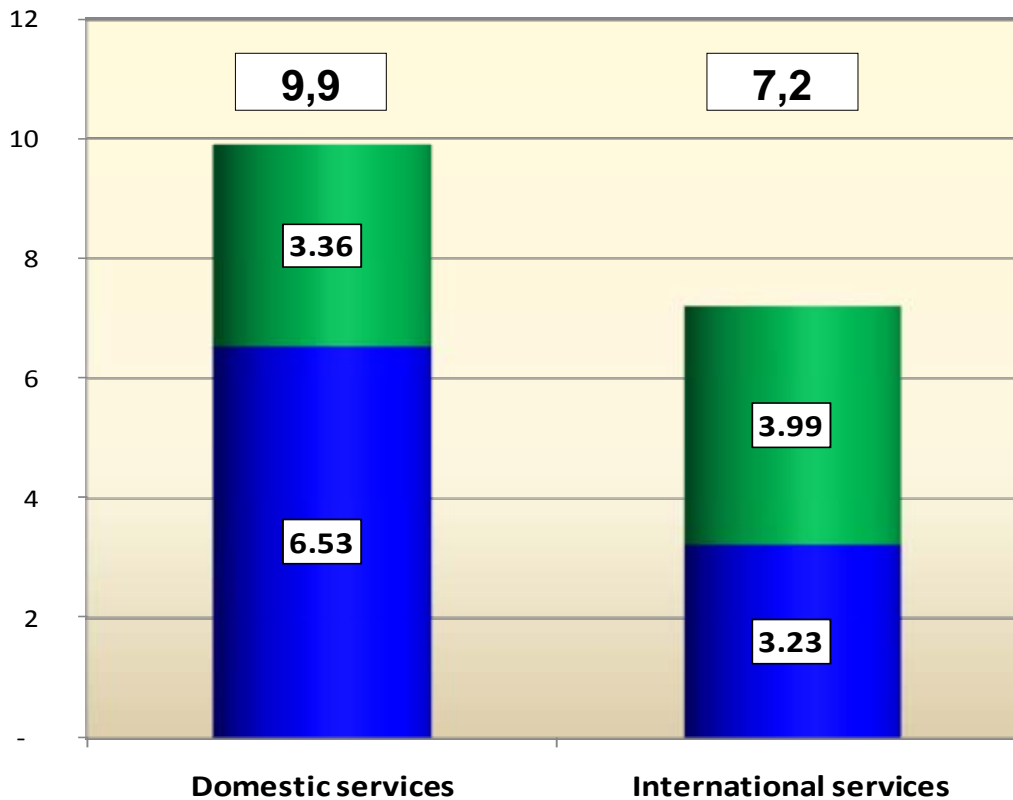
## Unaccompanied intermodal traffic: goods shipped

Million gross tonnes



## Unaccompanied intermodal traffic: TEU carried

Million TEU

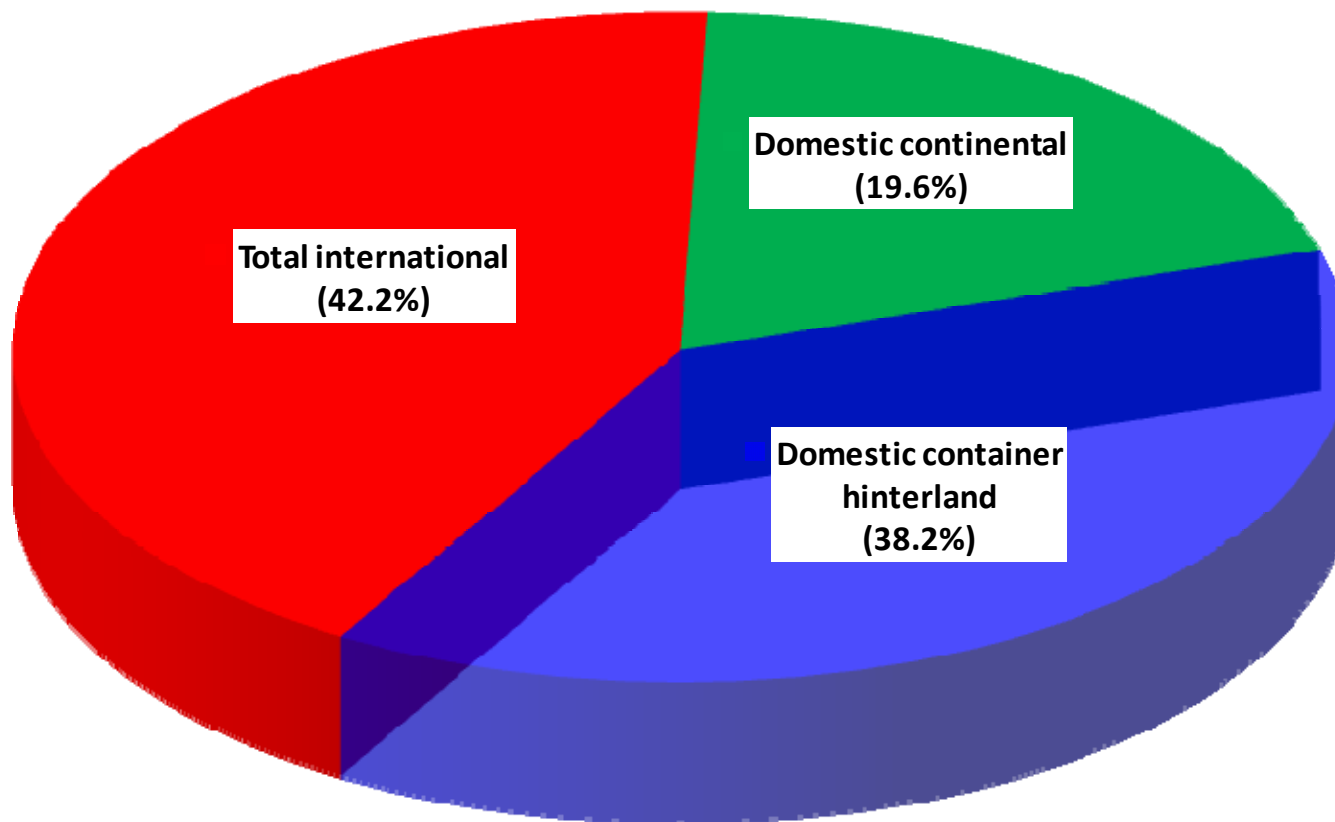


**Total:  
17.1m TEU**

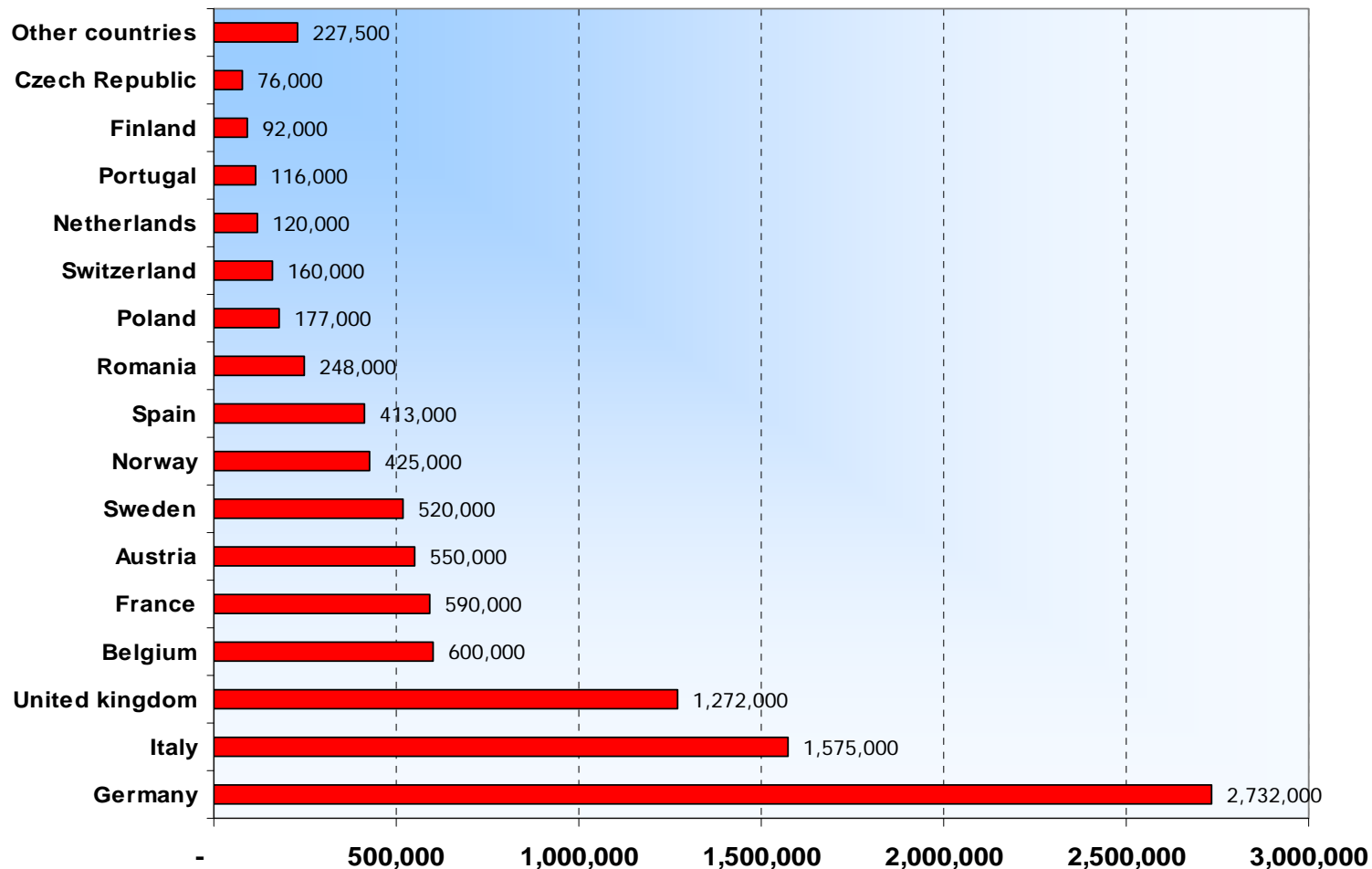


Source: KombiConsult; UIC: Report on Combined Transport in Europe 2007

## Importance of international freight (according to TEU)



## Domestic unaccompanied traffic by country 2007 (in TEU)





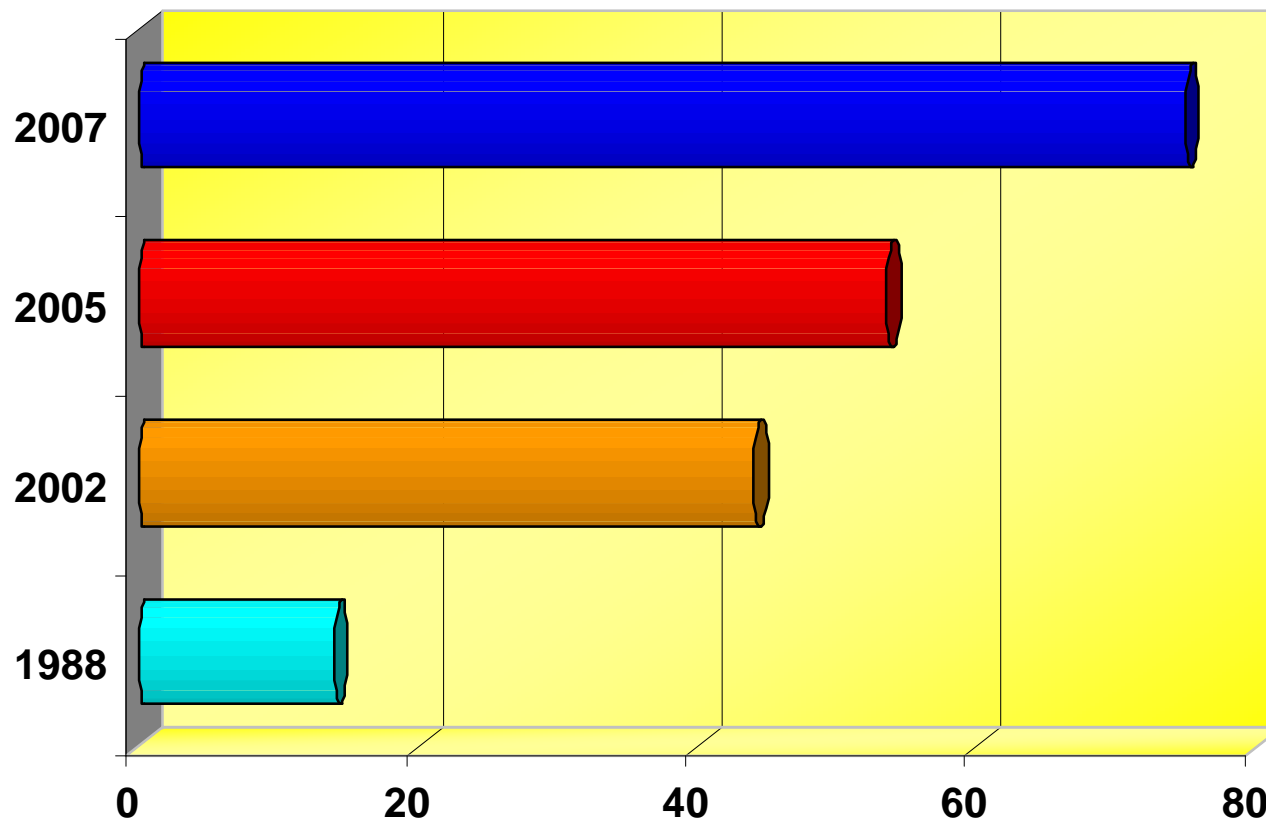
## Unaccompanied intermodal traffic 2005 -2007: goods shipped

Intermodal market segment	Traffic volume (million gross tonnes)		2007/2005 % change
	2005	2007	
Domestic services	71.74	97.19	35.5%
International services	53.61	74.97	39.8%
Total volume	125.35	172.16	37.3%

## Intermodal rail/road traffic involving CEE countries 2005 – 2007: TEU carried

Intermodal market segment	Million TEU		% growth 2005-2007
	2005	2007	
Domestic traffic in CEE countries	345,000	616,000	78.6%
International traffic involving CEE countries	875,000	2,146,000	145.3%
<b>Total CEE countries</b>	<b>1,220,000</b>	<b>2,762,000</b>	<b>126.4%</b>
<i>Percentage of total European traffic</i>	<b>9.6%</b>	<b>16.1%</b>	-

## Unaccompanied international traffic 1988-2007 (in tonnes)



## Accompanied intermodal rail/road traffic 2007

Market segment	Gross tonnes	Shipments (n° of trucks)	TEU
Domestic services	4,592,000	127,628	297,373
International services	9,018,000	282,255	657,654
<b>Total services</b>	<b>13,610,000</b>	<b>409,883</b>	<b>955,027</b>

## Accompanied intermodal rail/road traffic 2002-2007

	Mill tonnes	Index	Trucks	Index
2002	14.6	100	546,850	100
2005	10.2	70	323,050	59
2007	13.6	93	409,883	75

## Total intermodal rail/road traffic 2007: goods shipped

Intermodal market segment	Gross tonnes		
	Unaccompanied traffic	Accompanied traffic	Total intermodal traffic
Domestic services	97,192,045	4,592,000	101,784,045
International services	74,968,963	9,018,000	83,986,963
<b>Total intermodal services</b>	<b>172,161,008</b>	<b>13,610,000</b>	<b>185,771,008</b>

## Total intermodal rail/road traffic 2005-2007: goods shipped

Intermodal market segment	Traffic volume (million gross tonnes)		2007/2005 % change
	2005	2007	
Domestic services	73.28	101.78	38.9%
International services	62.27	83.99	34.9%
Total services	135.55	185.77	37.0%

## Intermodal trains by market segments 2007

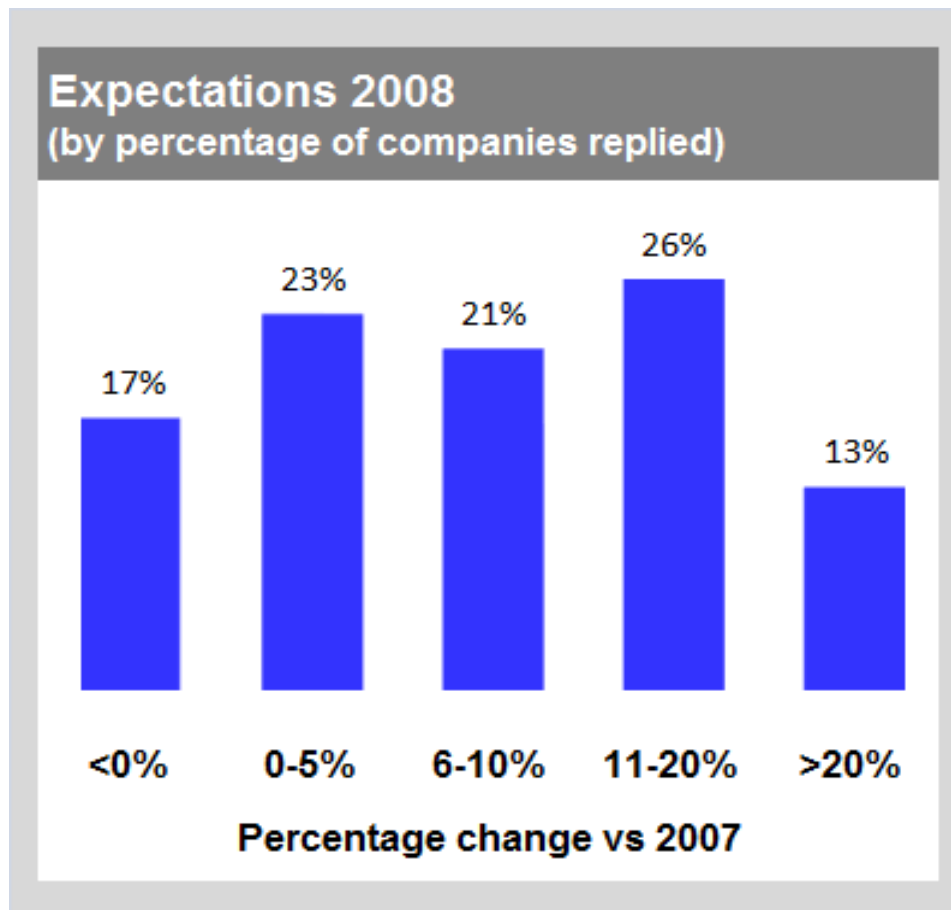
Intermodal market segment	Intermodal trains 2007			
	Reported figures	Adjusted figures	Estimated additional	Total
<b>Unaccompanied traffic</b>	<b>413,208</b>	<b>292,370</b>	<b>15,000</b>	<b>307,370</b>
Domestic services		156,020	15,000	171,020
International services		136,350		136,350
<b>Accompanied traffic</b>	<b>24,165</b>	<b>24,165</b>	<b>1,500</b>	<b>25,665</b>
<b>Total intermodal traffic</b>	<b>437,373</b>	<b>316,535</b>	<b>16,500</b>	<b>333,035</b>



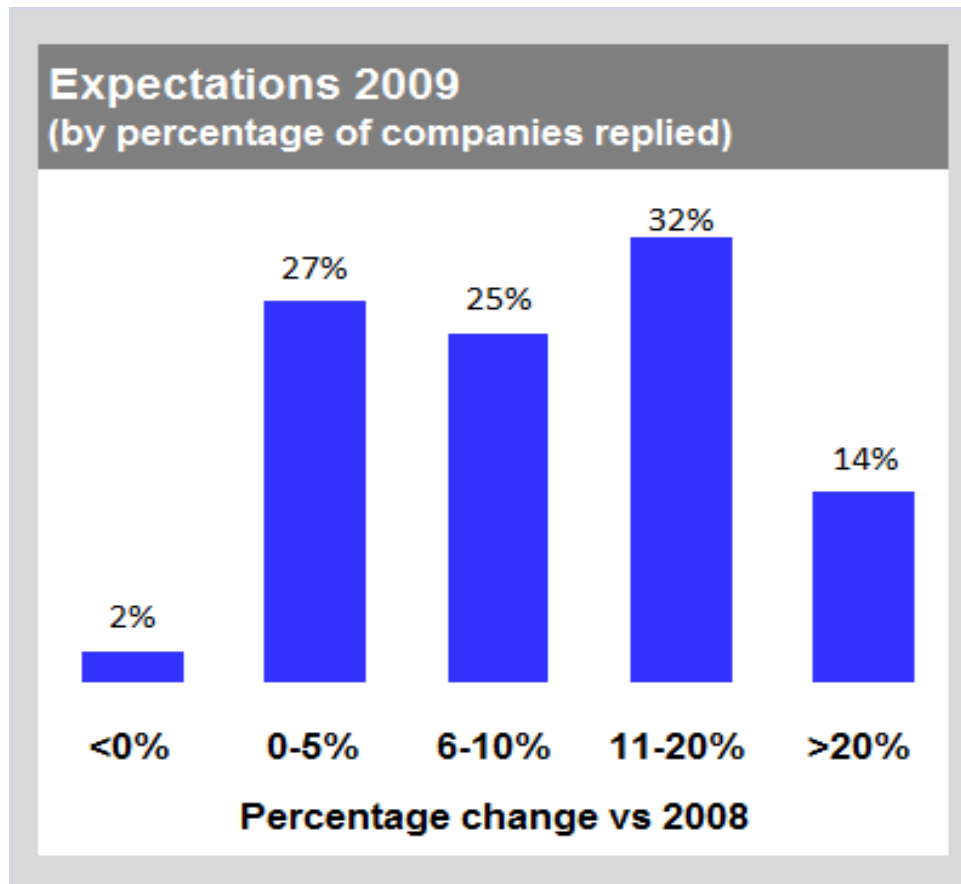


# Outlook for intermodal traffic 2008/2009

## Expectations of intermodal service providers on unaccompanied traffic: 2008 vs 2007

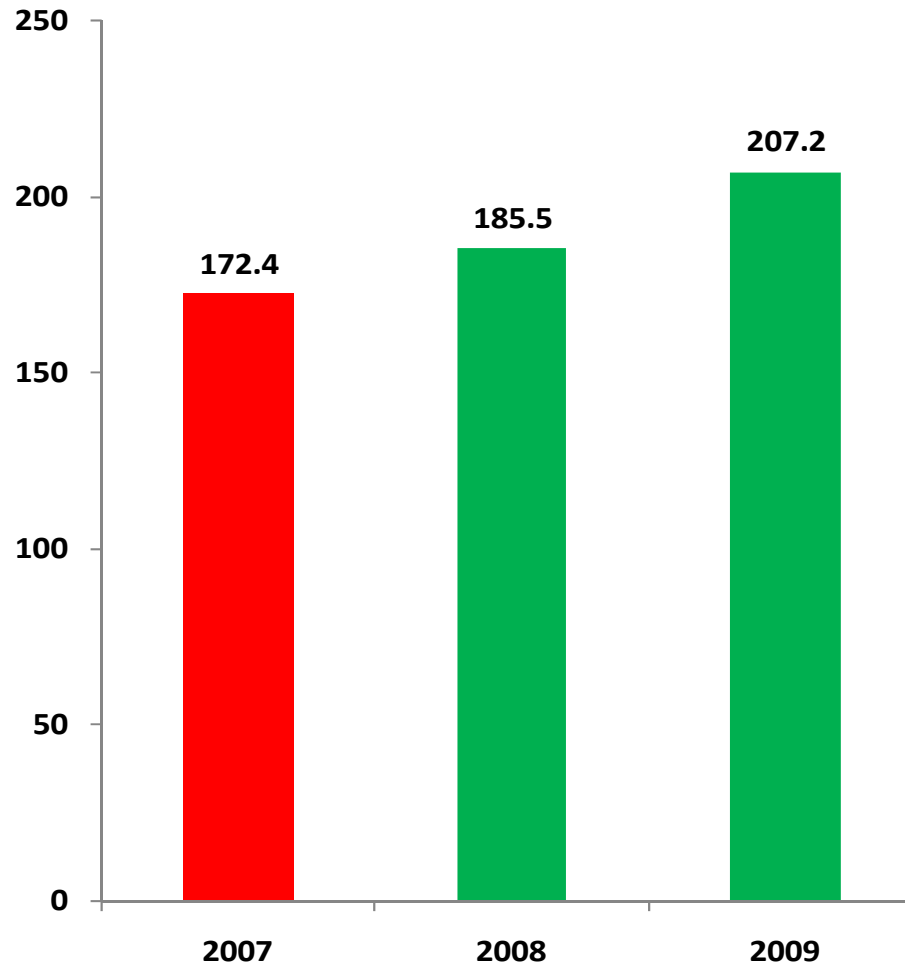


## Expectations of intermodal service providers on unaccompanied traffic: 2009 vs 2008



## Forecasted unaccompanied intermodal traffic: 2007-2009 (mill tonnes)

2008/2007: + 7.6%  
2009/2008: + 11.7%



THANK YOU

