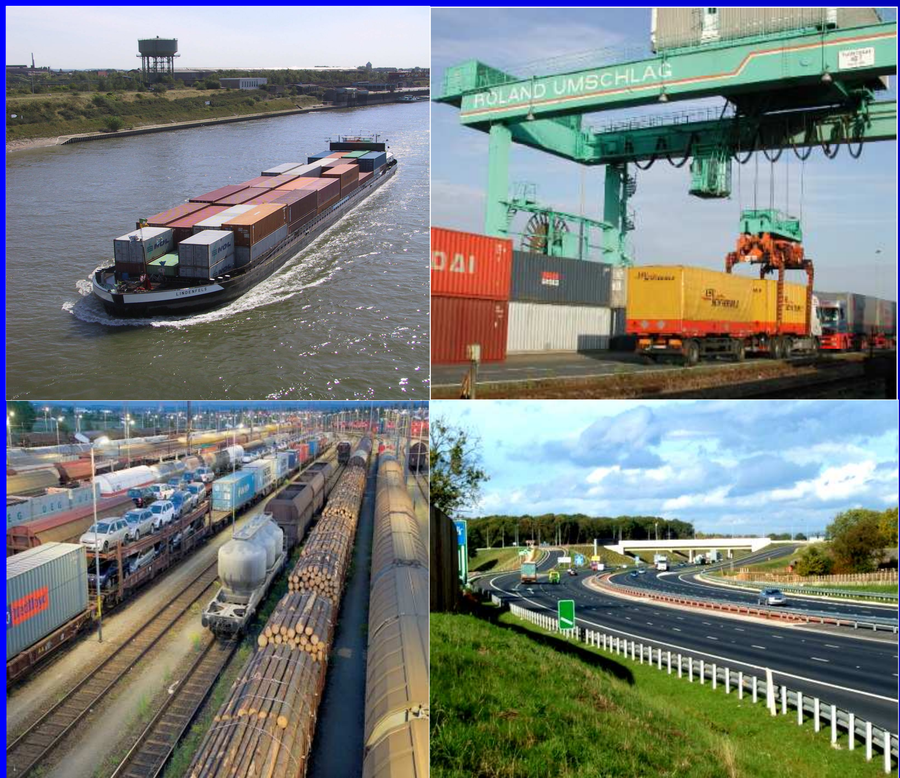
UNECE Working Party on Intermodal Transport and Logistics (WP.24)



Impact of the financial and economic crisis on intermodal transport

UNECE Secretariat

Economic crisis and intermodal transport

Outline

Document: ECE/TRANS/WP.24/2009/6

- **Economic and transport trends**
  - Economic developments
  - Transport sector
  - Intermodal transport
- **Short term reactions**
  - Intermodal transport operators
  - Railway undertakings
  - Governments and rail infrastructure managers
- **Turn challenges into opportunities**
  - Globalization and regionalization
  - Streamlining operations
  - Green logistics
  - Terminal operations
  - New markets for intermodal transport
- **Role of the Working Party**

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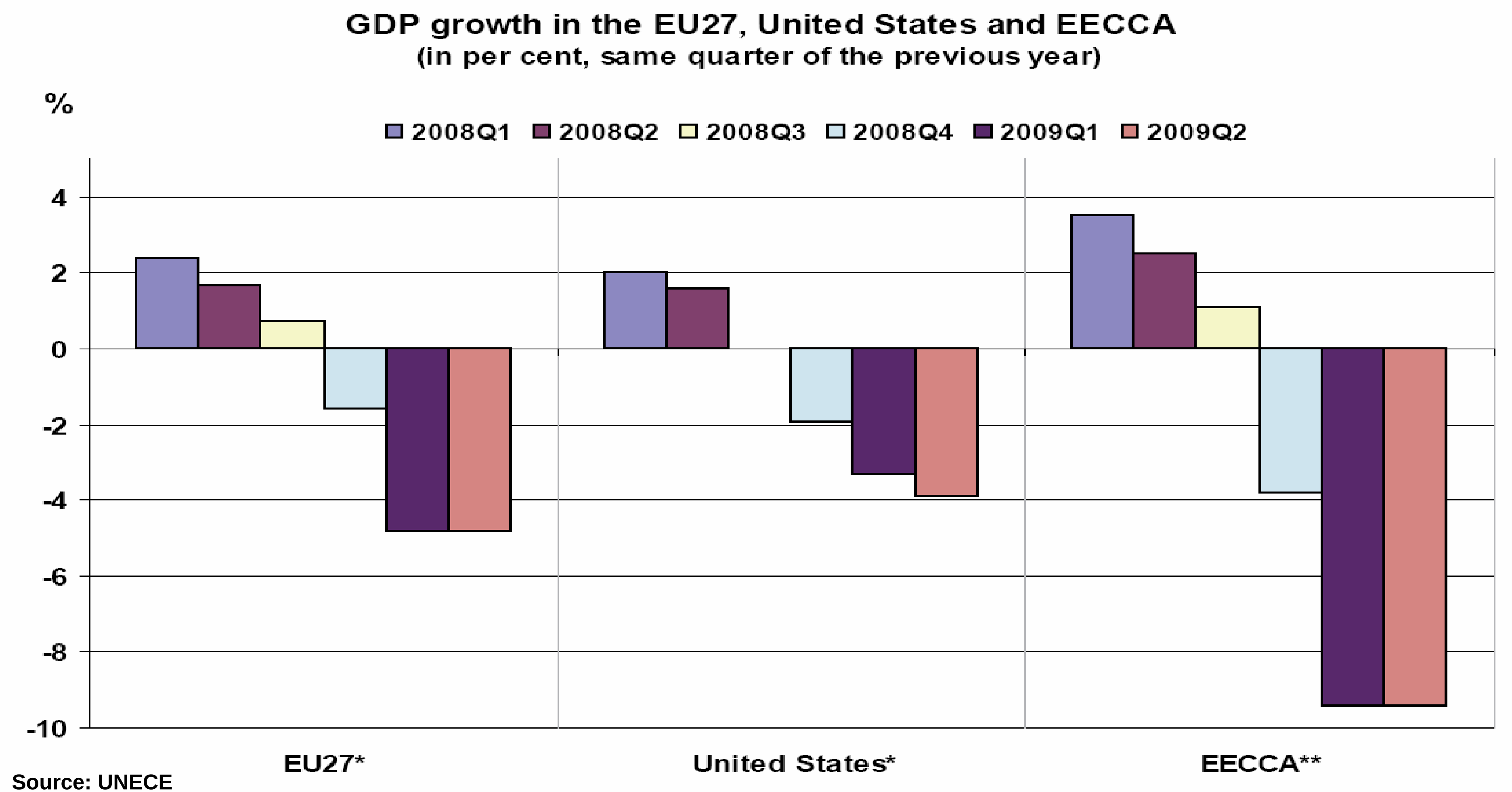
Economic developments



Source: UNECE

Economic crisis and intermodal transport

Development in the transport sector

- **Maritime transport (container)**

– Rotterdam	- 15%	1Q+2Q
– Antwerp	- 19 %	1Q+2Q
– German ports	- 26%	1Q + 2Q (-37% with US+Canada)

- **Rail transport**

– Germany	- 23%	1Q+2Q (-30% int, -19% in TEU) 2009: -18% est.
– SNCF	- 28%	1Q
– Russian Rail	- 27%	1 Q (- 20% 2Q)
TransSib	- 54%	(7 M) (190.390 TEU int. traffic)
– Total rail	- 20%	1Q + 2Q

- **Road transport**

– Germany	- 16%	Jan-June 2009 Total year: -11% (est.)
– Austria	- 17%	Jan-June 2009
– Total road	- 20-30%	1Q+2Q (-10-20% in national traffic)

- **Inland Water transport**

– German inland ports	- 25 %	(2009 est.)
– Total IWT	- 33%	(up to – 50%) 1Q+2Q

- **Outlook**
  - Bottom of cycle may now have been reached

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Trends in intermodal transport

- **Combined road/rail transport**
  - Kombiverkehr (Germany) — - 18-20% 1Q
  - GNTC (France) — - 30-50% 1Q
  - HUPAC — - 22% 1Q+2Q
  - Total: — - 20-25% 1Q
- **Port hinterland transport**
  - Transfracht — - 20% 1Q
  - HHLA Intermodal — - 17% 1Q
- **Rolling Highway (RoLa)**
  - Okombi — - 10% 1Q+2Q
  - Total — -10-12% 1Q
- **Modal shift towards road**
  - Switzerland (Alp transit): — -13% Intermodal; - 8% Road
- **Outlook**
  - Positive with possibly increasing prices

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Short-term reactions

- **Intermodal transport operators**
  - Adjustment of transport offers
  - Streamlining of internal procedures
  - Keep strategic investment plans and staff
- **Railway undertakings**
  - Discounts only to large intermodal operators
  - Some increase in prices
- **Governments and rail infrastructure managers**
  - No specific temporary assistance
  - Exceptions: Switzerland
- **Will intermodal transport survive the crisis ?**

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Turn challenges into opportunities

- **Globalization and regionalization**
  - Increase in intra-European transport
  - Increase towards East-West, South-East Europe, Transsib
- **Streamlining operations**
  - Many small private-public companies
  - Denser networks and higher service quality
  - Horizontal integration
  - Vertical integration
  - Increased use of information technology
- **Green logistics and intermodal transport**
  - Improve and sell the good “carbon footprint”
  - Reduce noise and other emissions
- **Terminal operators**
  - Improve efficiency of terminal operations
  - Cooperate with public authorities and trade unions
- **New markets**
  - High-value, but also high-volume goods
  - New technologies and infrastructures
  - Combination of intermodal and conventional cargo trains

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The role of the Working Party (WP.24)

- Exchange of policies and best practices
- Forum for Governments and private sector
- Platform for pan-European contacts
- Harmonization of standards and practices
- Development of international guidelines

Everything you always wanted to know about …, but were afraid to ask

www.unece.org/trans/wp24