UIC and Rail Freight

3rd Market Place Seminar

Barcelona, 02 November 2010

Oliver Sellnick, Director Freight UIC
UIC – a global association with almost 200 members around the world
Freight Forum: participating members
## Freight structures and projects

### CER-UIC HIGH LEVEL FREIGHT MEETING - Chairman Ferdinand Schmidt

### EU TAF TSI

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### UIC FREIGHT FORUM - Chairman Ferdinand Schmidt

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### GLOBAL

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www.RailFreightPortal.com
Rail freight: 12% drop in 2009, Europe and Americas hit the hardest

Rail freight 2006-2009 in million Ton-kms

Rail Freight by Region 2009 in million Ton-kms

Growth by region 2009/2008 Changes in % of Ton-kms

1) Europe including EU, EFTA, CEEC, Russia, Ukraine, Belarus

Source: UIC Railway Statistics, 2009
Recovery in the first half 2010. Strong differences from railway to railway

**Rail freight 2010 vs same period 2009**
Changes in % of Ton-kms

- **PKP**: 27%
- **DB**: 19%
- **SBB**: 17%
- **LG**: 16%
- **SNCB**: 16%
- **RZD**: 12%
- **CD**: 12%
- **KTZ**: 12%
- **JR**: 5%
- **CFR**: 1%
- **SNCF**: -11%
- **FS**: -11%

Source: UIC Railway Statistics
2010 US rail carloads up from 2009 but still significantly below 2008

> Rail carloads for August 2010 up 5.7% compared to 2009, but still 11.6% down compared to August 2008

> Carloads in August 2010 were down 1.6% from July 2010 (seasonally adjusted)

Source: AAR Rail Time Indicators, September 3, 2010
2010 intermodal volumes in US only slightly under 2008

Intermodal traffic up 19.7% in August 2010 compared with 2009, and only down 0.3% compared with 2008

Intermodal traffic was up 0.6% from July 2010

Data are weekly average originations for each month, exclude U.S. operations of CN and CP, and reflect revisions from original reporting. Source: AAR Weekly Railroad Traffic

Source: AAR Rail Time Indicators, September 3, 2010
Key observations GRFC 2010

> Surviving the crisis:
  - Crisis hit railways stronger in Europe and North America
  - Clear signs of recovery
  - Differentiated by country

> Opportunities:
  - Growing world trade needs more transportation. Modal shift to rail important for sustainable transport
  - Rail freight has become more customer oriented and integrated into global logistics
  - International corridors in Europe, Asia, the Middle East promoting efficient long-distance rail traffic

> Challenges:
  - Interoperability and cooperation: intramodal in terms of technology / administration / law / operations, but also intermodal connectivity
  - Productivity: train length and weight, capacity utilization
  - Integration with customers and informational transparency