Impact of the financial and economic crisis on intermodal transport

UNECE Secretariat
Economic crisis and intermodal transport

Outline
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Economic developments

GDP growth in the EU27, United States and EECCA
(in per cent, same quarter of the previous year)

Source: UNECE
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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% 1Q (-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
  - GNTOC (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

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