



INTERNATIONAL UNION
OF RAILWAYS

unity, solidarity, universality

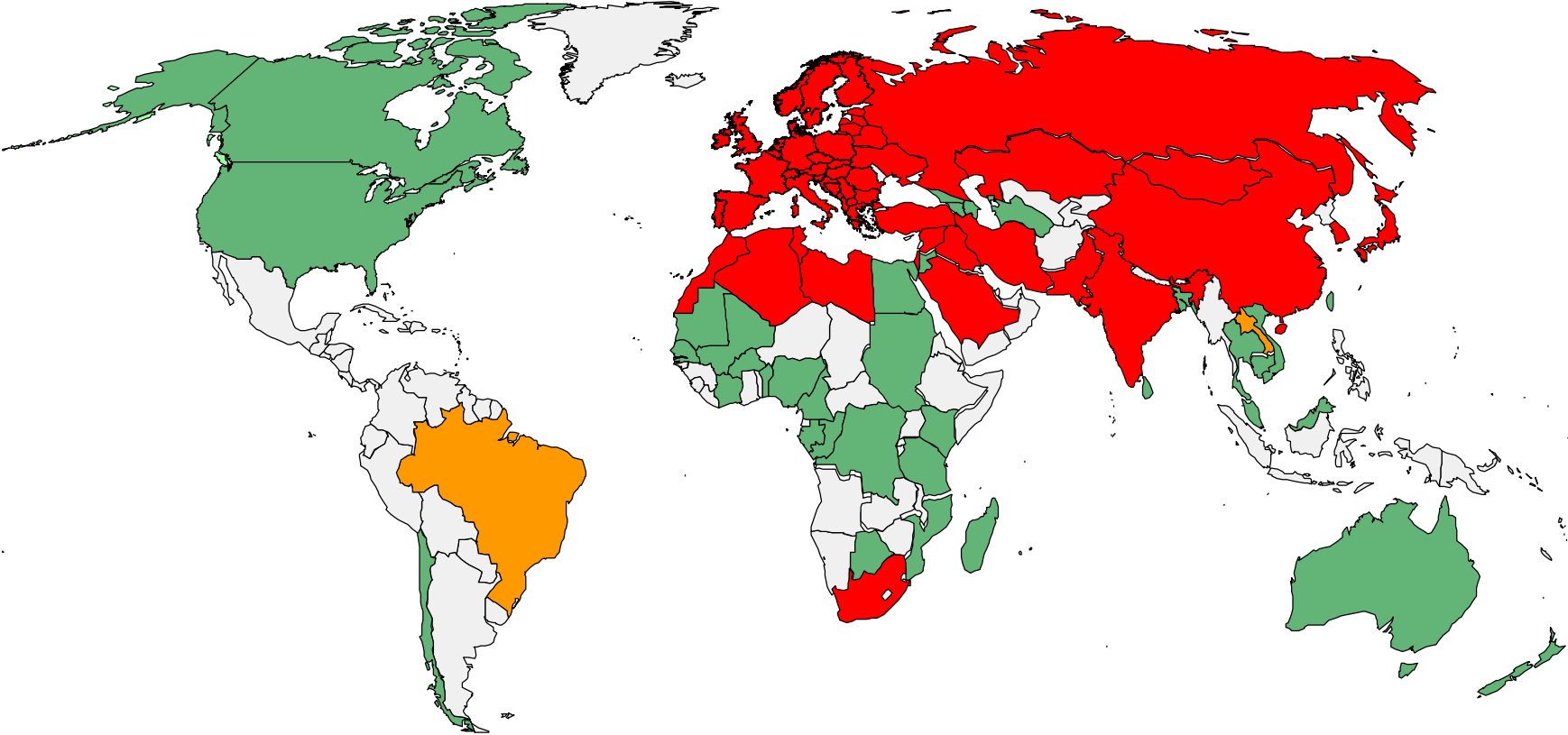
UIC and Rail Freight

3rd Market Place Seminar

Barcelona, 02 November 2010

Oliver Sellnick, Director Freight UIC

UIC – a global association with almost 200 members around the world



Members **80** Active **82** Associate **35** Affiliate




















Freight Forum: participating members



Freight structures and projects

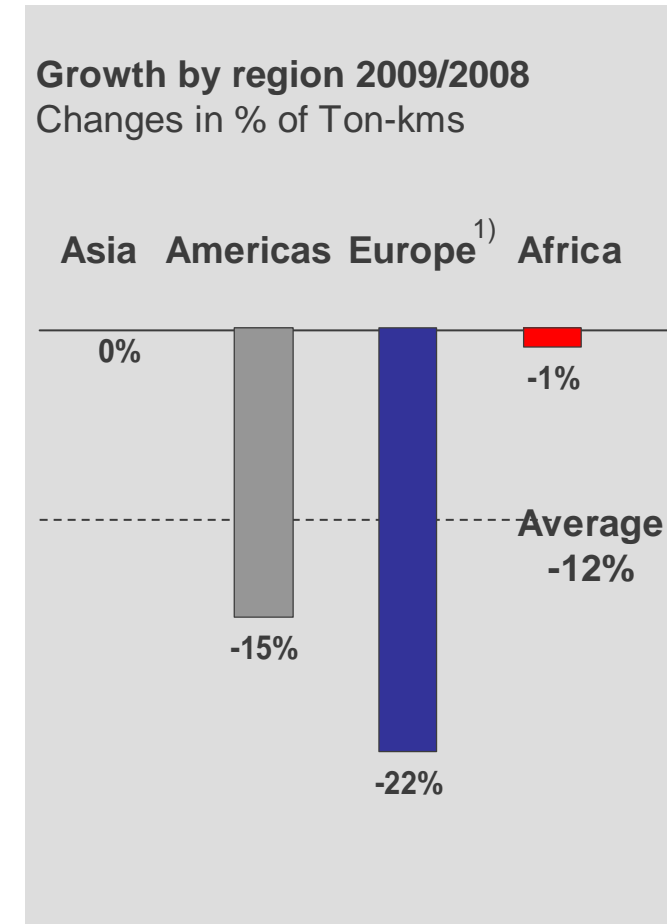
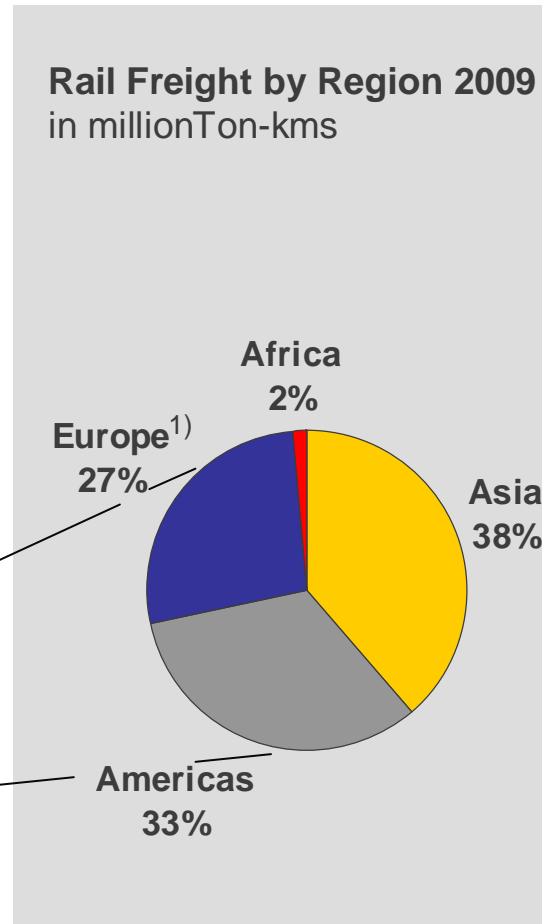
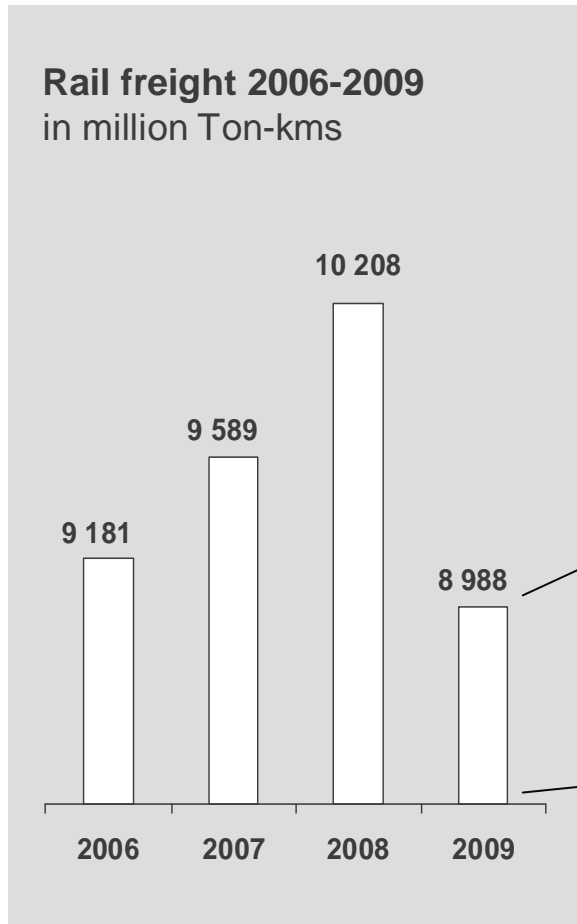
CER-UIC HIGH LEVEL FREIGHT MEETING - Chairman Ferdinand Schmidt  Ein Unternehmen der OBB

EU TAF TSI	UIC FREIGHT FORUM - Chairman Ferdinand Schmidt  Ein Unternehmen der OBB							GLOBAL
TAF TSI Implem.	Single Wagon Load	Combined Traffic	Freight Forwarders	Wagon Users	Freight Ops.	Quality Mgm.	Information Technology	Global Freight
Deployment		 GTC		 SG Wagon Users	SG Ops	SG Quality		
CCG	IFC	Interunit 	Contact Group	B.Schmitt J.Fazik				G.Manding S.Gehenot S.Nerdal
J.Lutz	G. Manding	S.Gehenot	G.Manding	E.Peetermans	H.Fikar	H.Pfeiffer	R.Wilke	V.Yakunin
J. Sundling R. Wilke 	G. Ferk 	E.Peetermans 	C. Biteau 	E.Peetermans 				
<ul style="list-style-type: none"> Deployment activities and sector coordination EU Commission interface Common Components Development 	<ul style="list-style-type: none"> European production alliance Reliability and transparency Commercial structure of cooperation 	<ul style="list-style-type: none"> IMPORT: industrialisation of CT* Market issues USE-IT Joint activities with UIRR in Interunit 	<ul style="list-style-type: none"> Regular exchange with Freight Forwarders* Market Place Seminars (Barcelona 2-3 Nov) 	<ul style="list-style-type: none"> GCU Joint Committee Rest of RIV Commercial Model Use of wagons (CMU) Loading rules* 	<ul style="list-style-type: none"> Cross border process optimisation* Coordination with Infrastructure Supply chain security Operations TSI 	<ul style="list-style-type: none"> Dangerous goods* Management systems Business Excellence* 	<ul style="list-style-type: none"> NHM / DIUM TAF TSI RU Cluster RICS + Hermes ISR, ORFEUS eRail Freight and paperless * 	<ul style="list-style-type: none"> GTE: Landbridges and international corridors* Project ICOMOD* GRFC



www.RailFreightPortal.com

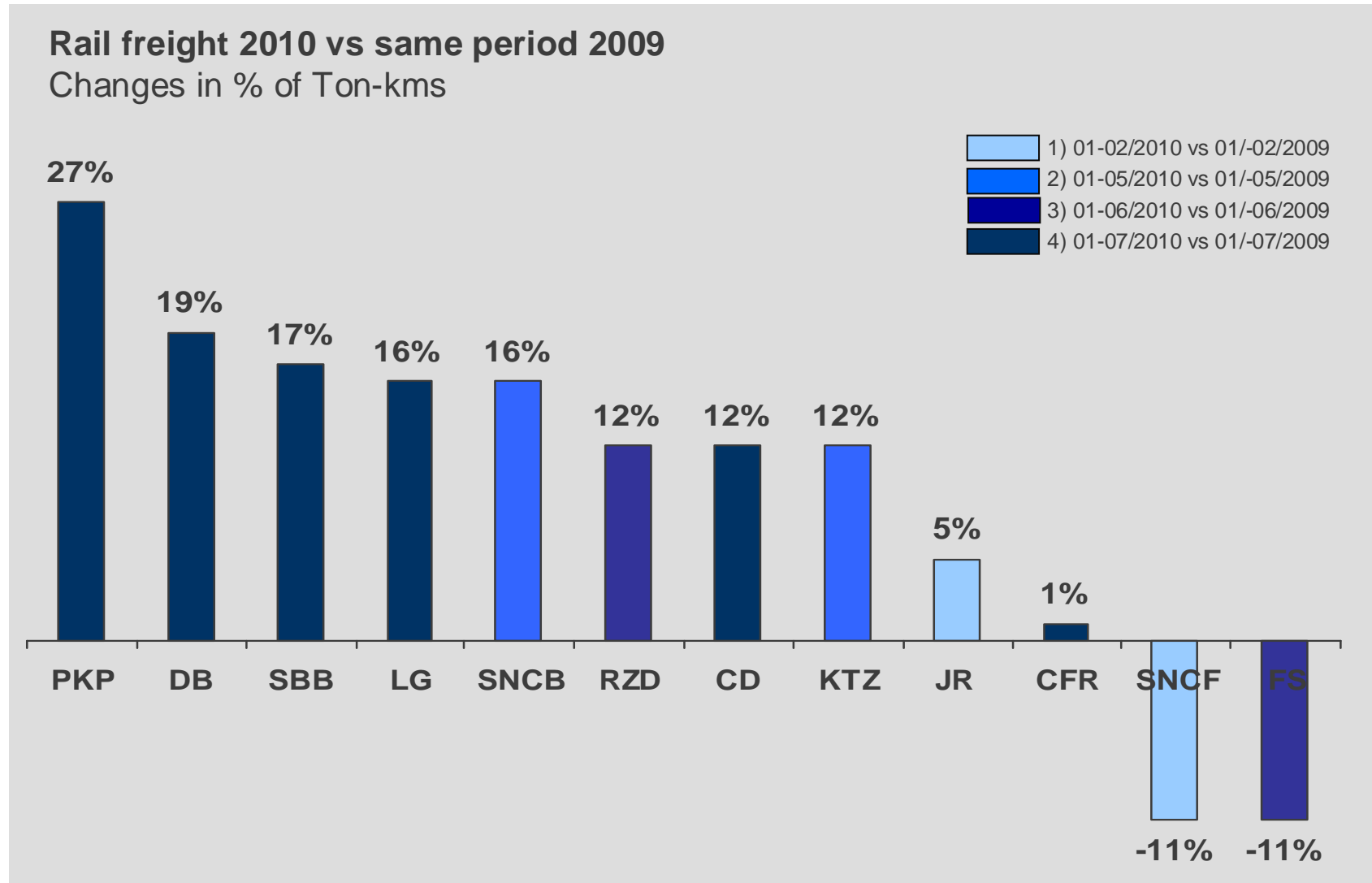
Rail freight: 12% drop in 2009, Europe and Americas hit the hardest



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

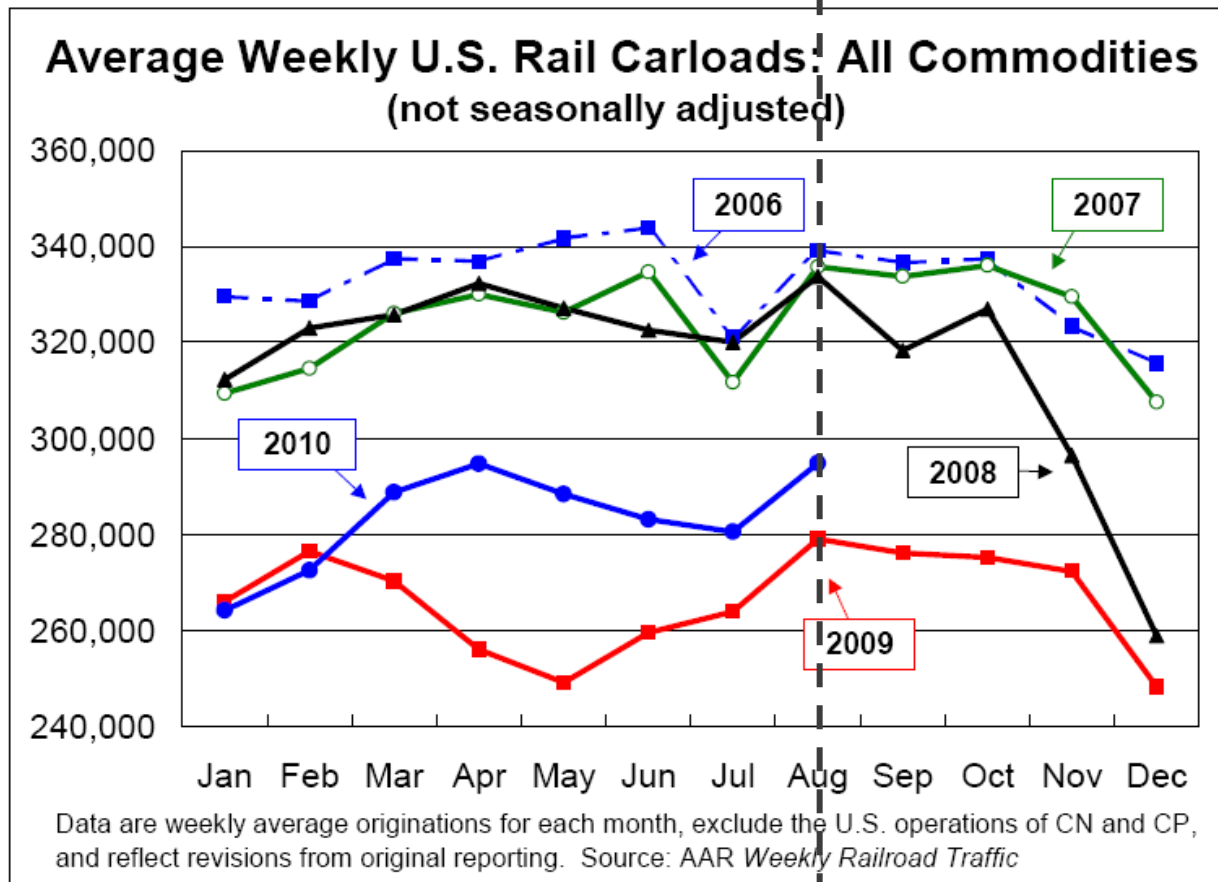
Source: UIC Railway Statistics, 2009

Recovery in the first half 2010. Strong differences from railway to railway



Source: UIC Railway Statistics

2010 US rail carloads up from 2009 but still significantly below 2008

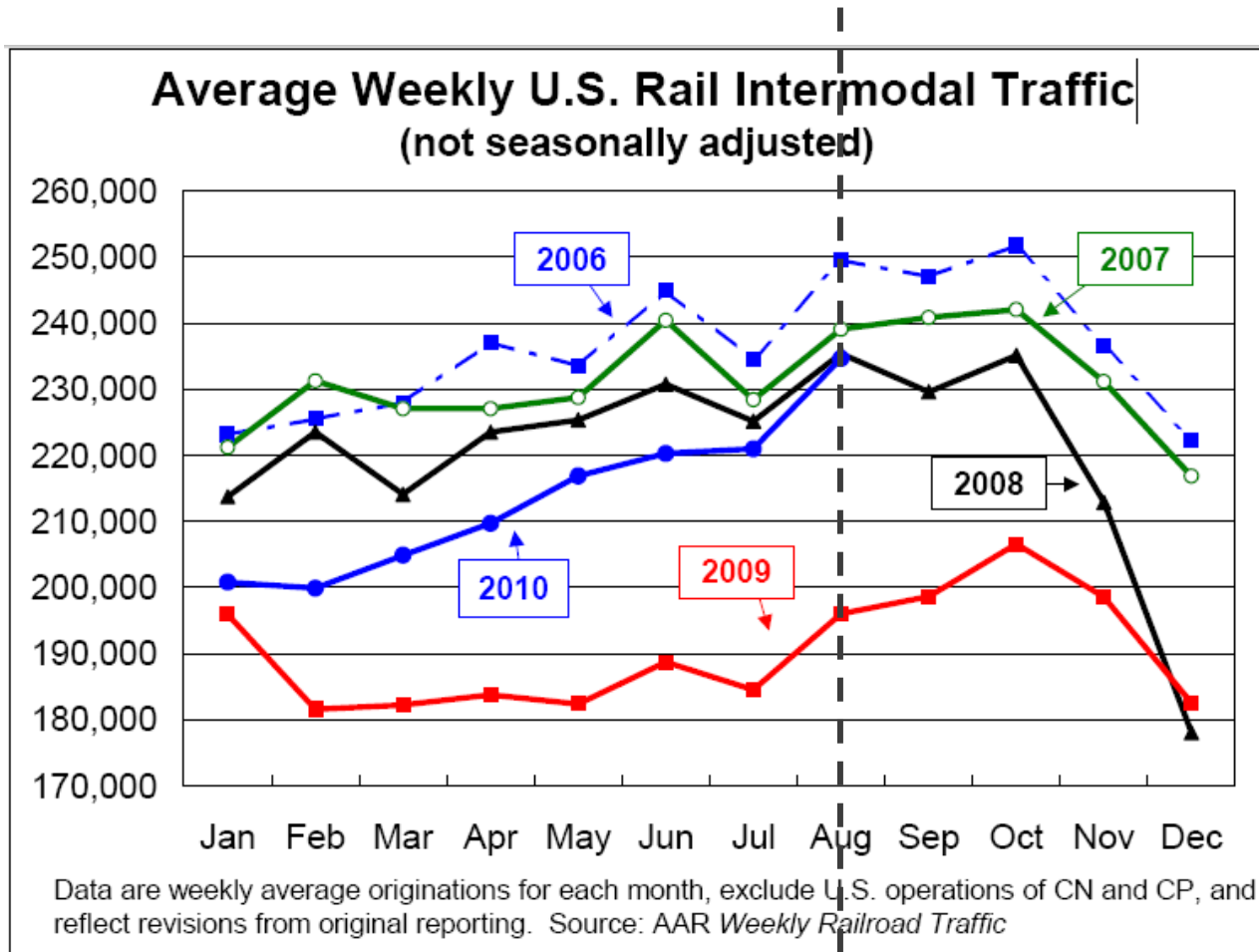


- > Rail carloads for August 2010 up 5.7% compared to 2009, but still 11.6% down compared to August 2008
- > Carloads in August 2010 were down 1.6% from July 2010 (seasonally adjusted)

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

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