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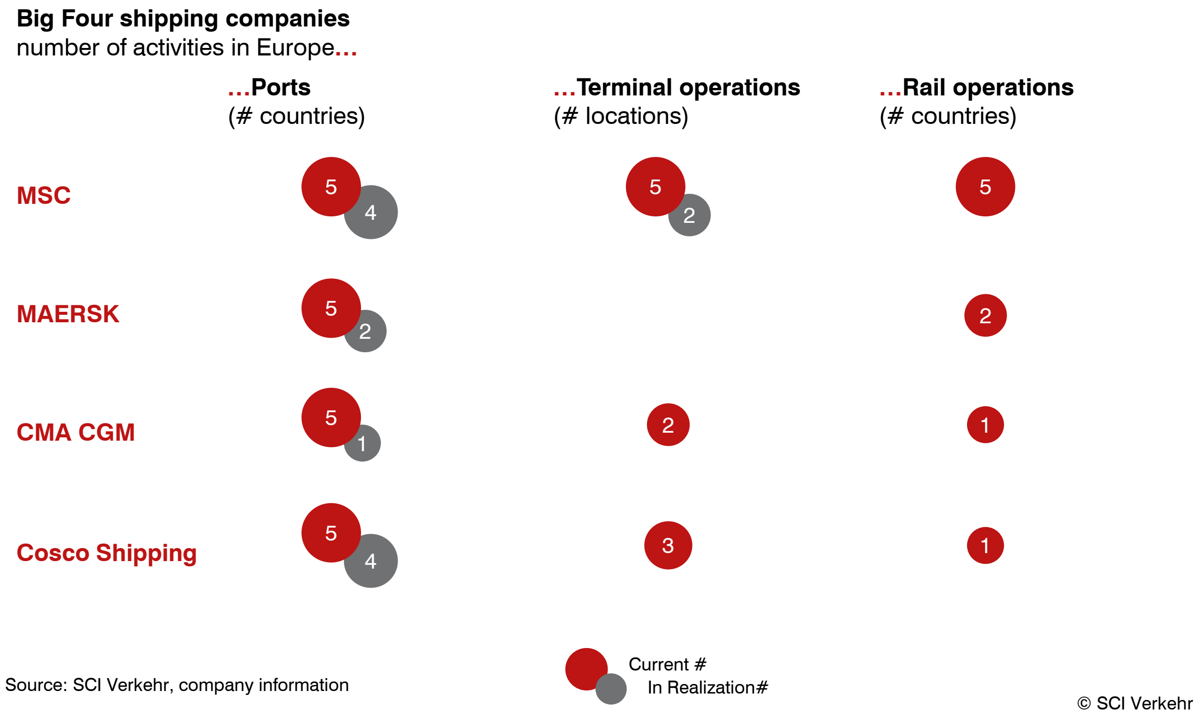
Ports, terminals and railway operators are highly attractive for global logistics players, especially in times of crisis

European seaports, hinterland terminals and hinterland operators are in the epicentre of a disruptive development enforcing a change of perspective. Until now, market shares of single players on regional and national level delimited the market while in the future decision makers will have to consider the organisation and control of global transport chains. A prime example is the assessment of the MSC investment into Hamburger Hafen und Logistik AG (HHLA) and subsequently the company's railway operator, Metrans. In the new MC study "EUROPEAN INTERMODAL RAIL FREIGHT MARKET-Networks, Players, Outlook", SCI Verkehr gives an overview of the current developments in the intermodal market.

Analysing the whole European intermodal market, SCI Verkehr examines in detail the activities of a small group of globally active companies that shape supply and transport chains step by step according to their needs – the Big Four of intermodal service providers: MSC, MAERSK, CMA CGM and COSCO.



With high purchasing power, these global players can capture partnerships, shares, and whole enterprises along the supply chain. With every take-over of ports, hinterland terminals, rail and increasingly road operators, their influence grows. Service networks guarantee flexibility within their own networks: Volumes, routes and combinations of means of transportation in Europe can be determined independently from suppliers and competitors.

The growing clout of the Big Four has the potential to reorganise the competitive framework of the railway and logistics sector. With uninhibited influence on supply and transport chains, their own strategic aims dominate and are become more and more independent from political regulation. Neither national nor European policy goals – like climate change action, mobility, and connectivity for peripherical regions – are the main drivers for the well-connected major companies, but the control of European import and export flows, which guarantee profits for each player.

The European competition guardians (EC) are also more and more attuned to guarantee a level playing field in rail freight transport, especially regarding the (former) national incumbents. While the investigations of the EC open up spaces for competitors, these spaces are also of interest to the biggest players. This is also driven by high investment needs: Outdated rolling-stock on infrastructure operating at the capacity limit are coupled with low growth rates and an unbalanced competitiveness.

Under these circumstances, all stakeholders must have a clear view on the European intermodal market: The decisive key factors – like access to port, terminals and railways and the availability of corridors - are at the centre of the study just presented by SCI Verkehr.

The MC study "EUROPEAN INTERMODAL RAIL FREIGHT MARKET – Networks, Players, Outlook" allows for detailed analysis of the outlook of the actors of the intermodal market. It contains background information on ports, terminals, railway corridors, major national markets the intermodal freight wagon fleet. The reader gets a deep dive into the current situation, planned projects and potential options for stakeholders. The study pinpoints the opportunities and possibilities for a forward-looking strategy for ports and railway operators in Europe.

The study " EUROPEAN INTERMODAL RAIL FREIGHT MARKET- Networks, Players, Outlook " is available in English from SCI Verkehr GmbH from November 2023 (www.sci.de/shop).

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