

# RAIL FREIGHT MARKET OVERVIEW

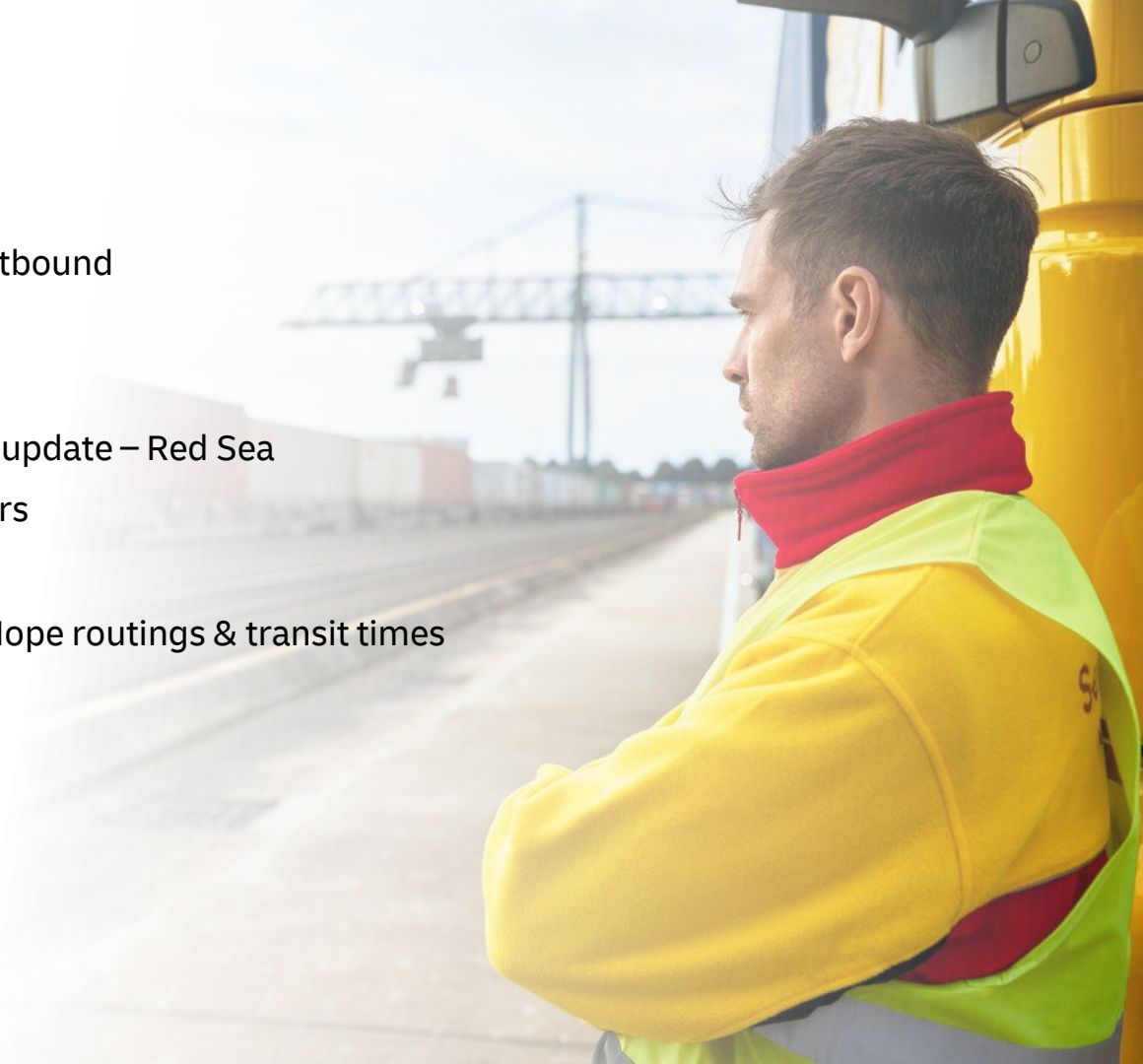
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# Capacity, Rates and Equipment situation

## China-Europe Westbound & Eastbound



**Westbound**

China Hubs	Train Capacity	Rates
General	●	+
Xi'an	●	=
Chengdu	●	+

### Remarks

- High demand for rail solutions continues; forecasting highly recommended, especially before National Holiday in China (1st-7th October)
- Booking window: 10-14 days before train ETD
- Congestion on main corridor at CN-KZ Borders crossings is gradually removed. Rail remains fastest solution to move containers from China to Europe
- Xi'an speed train available with 16 days of transit time to Duisburg; speed trains have priority at border crossings
- Train terminal-terminal transit time on average: 16 days to Poland, 22-24 days to Germany



**Eastbound**

China Hubs	Train Capacity	Rates
General	●	=
Xi'an	●	=

### Remarks

- Space situation and transit times improved
- Cargos with HS Codes 84, 85, 87 affected by Polish customs office with tightened document requirements
- Transit time performance : Single express trains continue to operate with lead times of 12-15 days from Germany to China, while average standard train transit times are 18-22 days (terminal-terminal)
- Available connection with East Asia: KR, JP with 30 days of transit time

### Capacity



### Rates



# Capacity, Rates and Equipment situation

## China / Europe <-> Turkey & Central Asia



Central Asia

China Hubs	Capacity	Rates
From China	●	=
From Europe	●	=



Turkey

China Hubs	Capacity	Rates
From China	On demand	=
From Europe	On demand	=

### Remarks

- Service from China/Europe to Kazakhstan, Central Asia and South Caucasus (e.g. Baku in Azerbaijan) available
- Regular trains on Middle Corridor available
- Connection to Turkey via Western corridor and Poland/Hungary regularly available
- Increasing activity by transit countries (KZ, GE, AZ) to establish a stable middle corridor service, bottlenecks still exist



Middle Corridor

China Hubs	Capacity	Rates
General	●	=

### Capacity

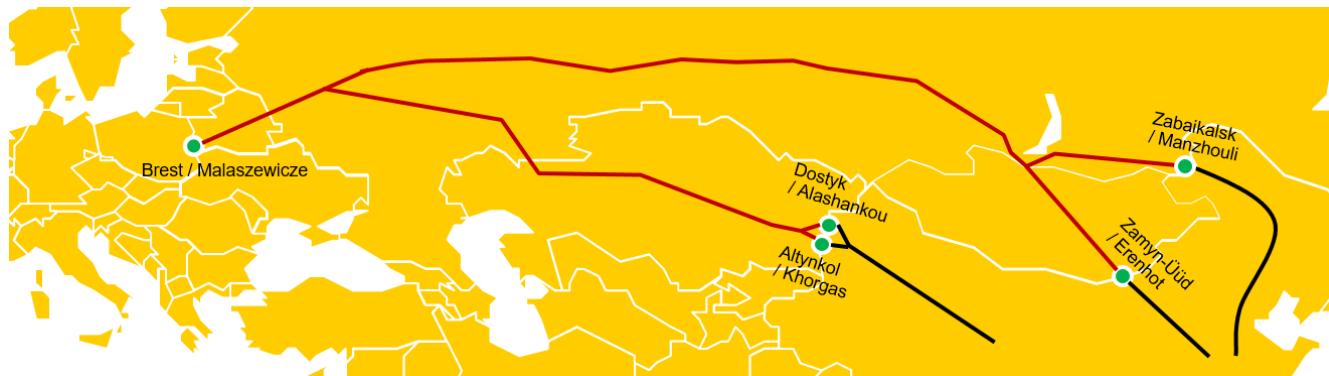


### Rates



# Cross-border Situation Update

## Standard Railway Borders in Europe & China



### Railway track width & main hubs across the route:

- 1435 mm railway (standard)
- 1520 mm railway (wide)
- 1435-1520 railway borders

### Transit times via the main cross-border points

#### Westbound (China to Europe)

China Outbound		→	Europe Inbound	
Alashankou	Khorgos		Malaszewicze	
~4.5 days	~4.9 days		~1.5 days	

#### Eastbound (Europe to China)

Europe Outbound		→	China Inbound	
Malaszewicze	Alashankou		Alashankou	Khorgos
~1.0 days	~1.0 days		~1.0 days	~2.0 days

#### Container transit times

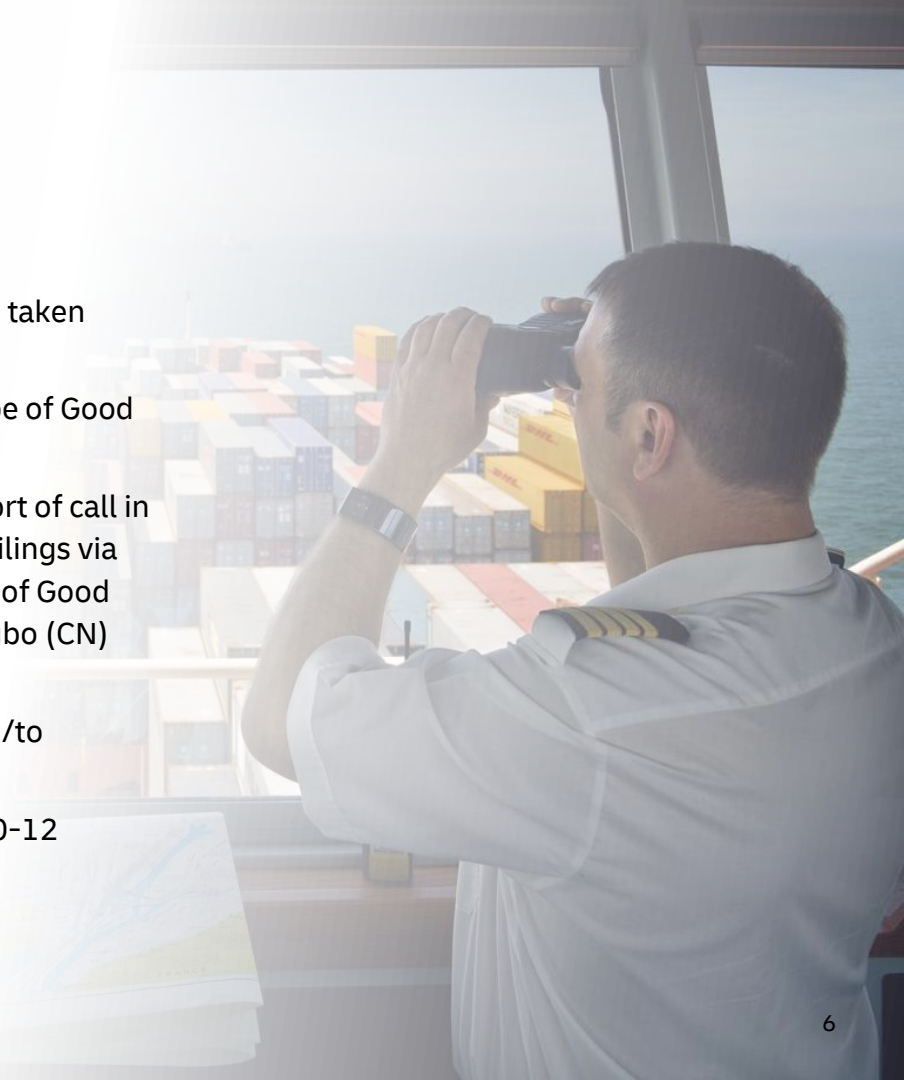
■	<3 days
■	3-6 days
■	> 6 days

\*Transit time in days is an average based on DHL GPS system data and rail carrier's daily tracing report from the W17-18 2024

## DHL Multimodal OceanExpress: Red Sea situation update

- Vessels continue to route via Cape of Good Hope. Routing decision taken individually for each journey based on latest situation
- Transit time extended by average 10 days due to rerouting via Cape of Good Hope
- To ensure fast access and speed of containers Westbound, first port of call in Europe is changed to Barcelona (ES), followed by Koper (SI) for sailings via Cape of Good. From Koper, Eastbound vessels are routed via Cape of Good Hope to China with first port call at Qingdao (CN) followed by Ningbo (CN) and Da Chan Bay (CN).
- Northern Europe is connected with scheduled feeder vessels from/to Barcelona – Moerdijk (NL)
- For detailed route & transit time information, please refer to pp. 10-12

Remark: no major changes since the last month



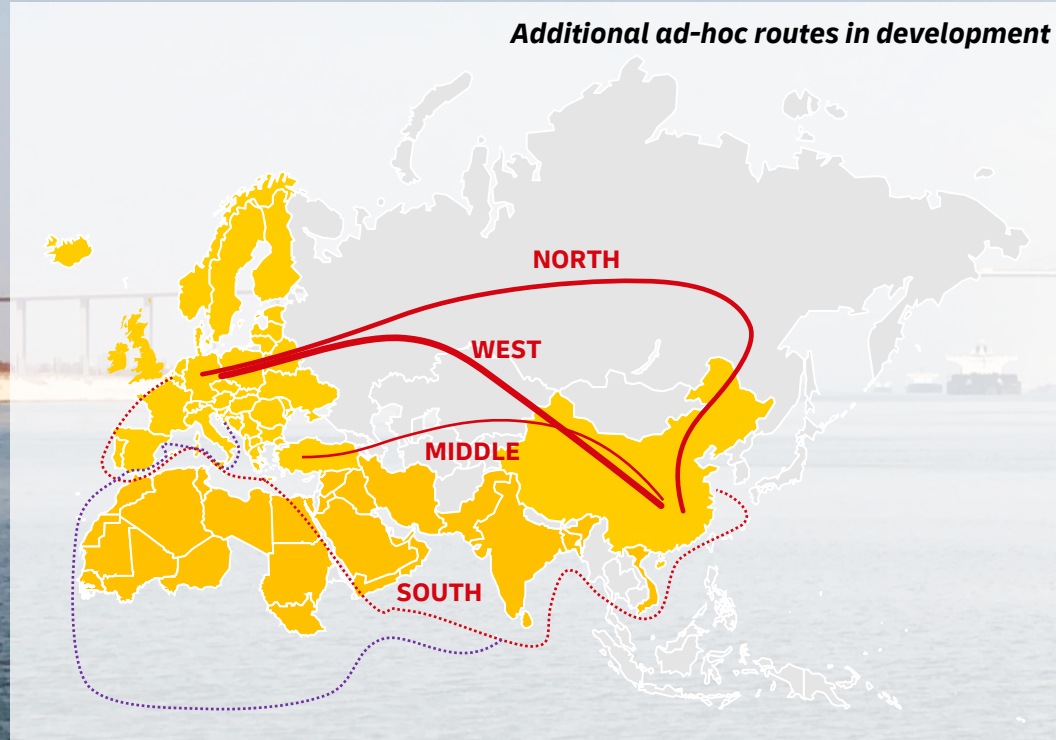


# RAILWAY & MULTIMODAL ROUTINGS

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# Major Rail & Multimodal corridors connecting Europe and Asia



## West Corridor:

**28-30 days**

Main route: CN-KZ-BY-PL

**Fastest options for FCL/LCL**

## North Corridor: 30-32 days

Main route: CN-RU-BY-PL

## Middle Corridor Rail :

**40-45 days to Europe (est.)**

CN-Trans-Caspian-EU & TR

**Bypass Russia**

## West/Middle Corridor Road:

**20-22 days / 30-35 days**

CN-Russia or Trans-Caspian-EU/TR

**FTL**

## South Corridor via Suez:

**28-30 days**

Main route: CN-MedPorts-Europe

**Multimodal Ocean Express**

## South Corridor via COGH:

**44-45 days**

Main route: CN-MedPorts-Europe



# DHL Rail & Multimodal OceanExpress : The fastest way to deliver LCL shipments from anywhere in China to / from anywhere in Europe



## Regular LCL connections

Door to door service

To / from anywhere in China

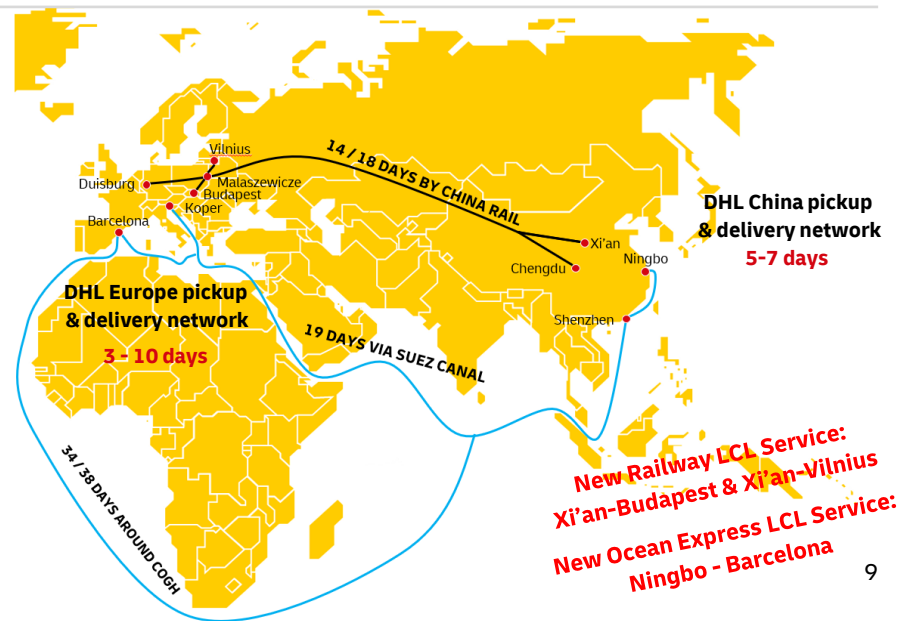
To / from anywhere in Europe

FOB term available

Fast transit via Western & Southern Corridor

Cost per cbm, min. 1 cbm

GPS tracking CFS-CFS



## Book your shipment at the scheduled multimodal routings



Name	Xi'an Eastbound Speed Train	Xi'an Westbound Speed Train	Chengdu Trains
Origin	Duisburg / Hamburg, DE	Xi'an, Shaanxi, CN	Chengdu, Sichuan, CN
Destination	Xi'an, CN	Hamburg / Duisburg, DE	Malaszewicze / Lodz, PL; Hamburg / Duisburg, DE; Budapest, HU
Transit Time	13-15 days -Xi'an	13-15 days – Hamburg / Duisburg	20 days – to Malaszewicze 22-24 days – to Hamburg / Duisburg 24 days – to Budapest
ETD	Weekly	4 departures per week	Twice per week
Route	West Corridor: DE-PL-BY-RU-KZ-CN	West Corridor: CN-KZ-RU-BY-PL-DE	West Corridor: CN-KZ-RU-BY-PL
Remark	<ul style="list-style-type: none"> <li>Fastest service from Europe to China</li> <li>Based on successful WB speed train model operating since November 2022</li> </ul>	<ul style="list-style-type: none"> <li>Fastest railway service to Germany and Western Europe</li> </ul>	<ul style="list-style-type: none"> <li>Multiple destinations in Europe</li> <li>Competitive rates</li> <li>Suitable for South China origins</li> </ul>

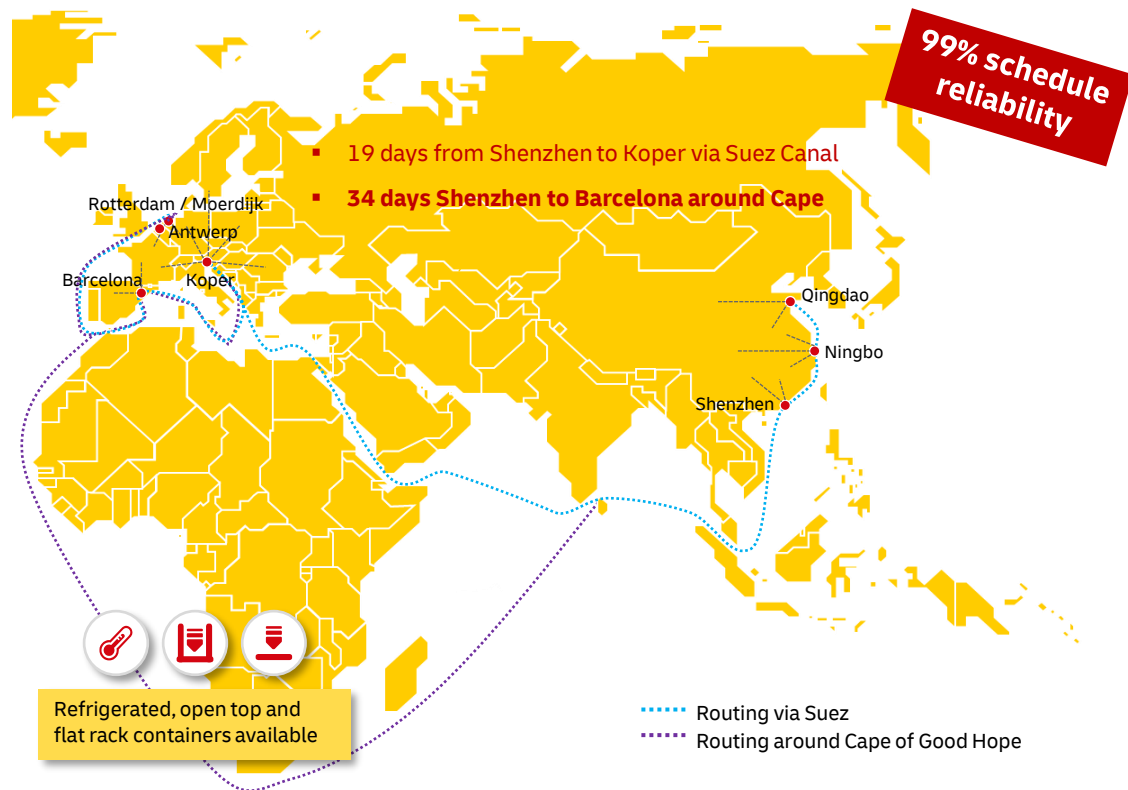
# Book your shipment at the scheduled multimodal routings



Name	Xi'an – Budapest/Belgrade train
Origin	Xi'an, Shaanxi, CN
Destination	Budapest, HU Belgrade, RS
Transit Time	24 days Xi'an-Budapest 27 days Xi'an-Belgrade
ETD	Weekly
Route	West Corridor: CN-KZ-RU-BY-PL-CZ-SK-HU
Remark	<ul style="list-style-type: none"><li>• Direct train from China to Hungary</li><li>• Service via Budapest to Belgrade available</li></ul>

# DHL Multimodal OceanExpress:

## Fastest and most reliable ocean connection from China



### Service outline

- Reliable and punctual schedule with two departures a month, regardless of the routing (via Suez or around Cape of Good Hope)
- Short transit time comparable with direct China-Europe railway
- Batteries & IMO DG accepted, refrigerated container service available
- Quality oriented operational model:
  - Fleet of mid-sized vessels with short queuing & berthing lead times
  - Fast loop with synchronized feeder connections

### Terminal-terminal transit time indications (via Suez or around COGH\*)

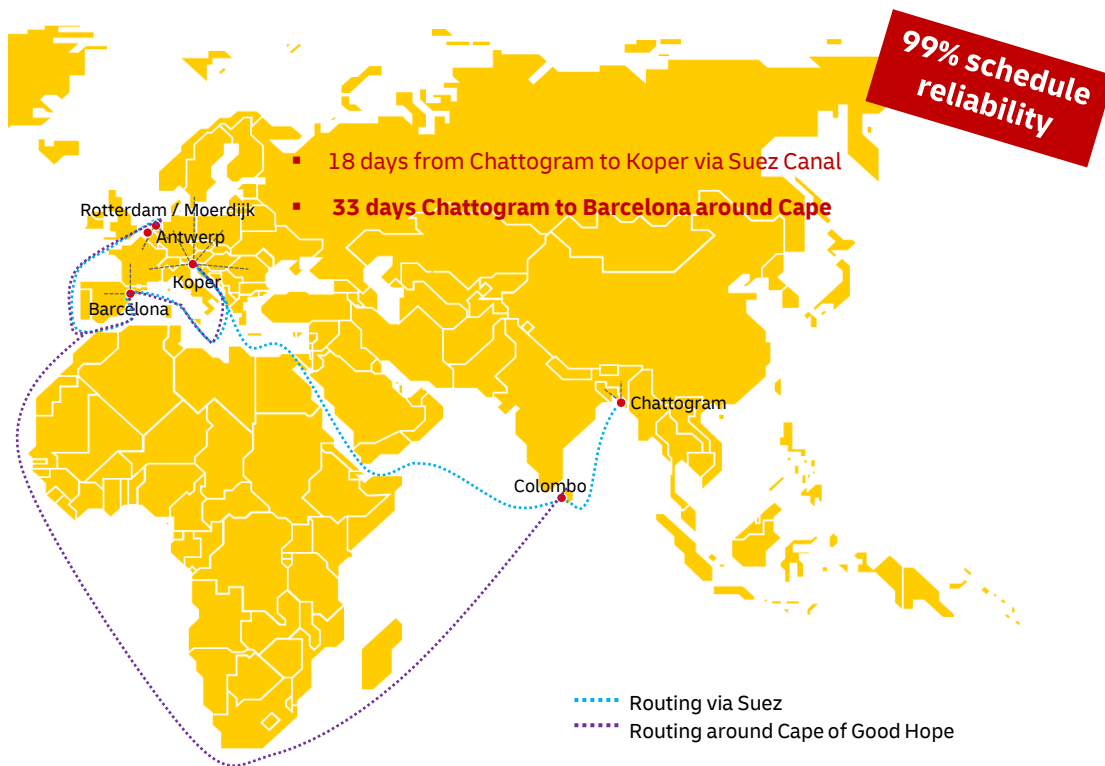
Route	(days)	Koper	Barcelona	Moerdijk**	Duisburg
Via Suez	Shenzhen to...	19	23	29	24
	Ningbo to...	22	26	32	27
	Qingdao to...	26	30	37	31
Around COGH	Shenzhen to...	39	34	42	43
	Ningbo to...	42	37	45	46
	Qingdao to...	45	40	48	49

\* COGH – Cape of Good Hope; COGH transit time indications are subject to changes based on sailing plan for each journey; \*\* Altered routing via Barcelona is connected by feeder to Moerdijk & Antwerp ports



# DHL Multimodal OceanExpress:

## Fast connection from Bangladesh & Sri Lanka to Europe



### Key points

- Reliable and punctual schedule with two departures a month, regardless of the routing (via Suez or around Cape of Good Hope)
- Short transit time comparable with fastest multimodal solutions
- Quality oriented operational model:
  - Fleet of mid-sized vessels with short queuing & berthing lead times
  - Fast loop with synchronized feeder connections
- Connectivity in Europe - by truck and/or rail (intermodal)

### Terminal-terminal transit time indications (via Suez or around COGH\*)

Route	(days)	Koper	Barcelona	Moerdijk**	Duisburg
Via Suez	Chattogram to...	18	22	28	23
	Colombo to...	11	25	21	16
Around COGH	Chattogram to...	37	33	41	42
	Colombo to...	30	26	34	35

\* COGH – Cape of Good Hope; COGH transit time indications are subject to changes based on sailing plan for each journey; \*\* Altered routing via Barcelona is connected by feeder to Moerdijk & Antwerp ports





# DHL Multimodal OceanExpress - Eastbound: Fastest and most reliable ocean connection from Europe to China



## Key points

- Reliable and punctual schedule with two departures a month, regardless of the routing (via Suez or around Cape of Good Hope)
- Short transit time comparable with direct China-Europe railway
- Batteries & IMO DG accepted, refrigerated container service available
- Quality oriented operational model:
  - Fleet of mid-sized vessels with short queuing & berthing lead times
  - Fast loop with synchronized feeder connections

## Terminal-terminal transit time indications (via Suez or around COGH\*)

Route	(days)	Qingdao	Ningbo	Shenzhen
Via Suez	Rotterdam to...	29	33	37
	Duisburg to...	33	37	38
Around COGH	Koper to ...	39	42	45
	Barcelona to...	44	47	50
	Moedijk/ Antwerp to...	50	53	56

\* COGH – Cape of Good Hope; COGH transit time indications are subject to changes based on sailing plan for each journey; \*\* Altered routing via Barcelona is connected by feeder to Moerdijk & Antwerp ports

# Terminology & Abbreviations

## Terminology

ATA – Actual time of Arrival	POL – Port of Loading
ATD – Actual Time of Departure	PTL – Part truck load
BRI – Belt and Road Initiative	SMGS – Agreement on the International Goods
BT – Block Train	Transport by Rail
CAGR – Compound Annual Growth Rate	SOC – Shipper Owned Container
CFS – Container Freight Station	T – Thousands
COC – Carrier Owned Container	TEU – Twenty feet equivalent unit (20’
COTIF – Convention concerning International	container)
Carriage by Rail	QoQ – Quarter on quarter
DG – Dangerous Goods	YoY – Year-on-Year
ETA – Estimate Time of Arrival	YTD – Year-to-Date
ETD – Estimated Time of Departure	
EB – Eastbound	
FCL – Full container load	
FTL – Full truck load	
FEU – Forty feet equivalent unit (40’ container)	
FOB – Free onboard	
FSC – Fuel Surcharge	
GRI – General Rate Increase	
LCL – Less than container load	
LTL – Less then truck load	
MoM – Month-on-Month	
WB – Westbound	
POD – Port of Discharge	

## Countries

AT – Austria	LT – Lithuania
AZ – Azerbaijan	LU – Luxembourg
BE – Belgium	LV – Latvia
BG – Bulgaria	MN – Mongolia
BY – Belarus	NO – Norway
CH – Switzerland	PL – Poland
CN – China	RO – Romania
CR – Croatia	RS – Serbia
CZ – Czechia	RU – Russia
DE – Germany	SE – Sweden
DK – Denmark	SK – Slovakia
EE – Estonia	TH – Thailand
ES – Spain	TM – Turkmenistan
FI – Finland	TJ – Tajikistan
FR – France	TR – Turkey
GB – Great Britain	UA – Ukraine
GE – Georgia	UZ – Uzbekistan
GR – Greece	VN – Vietnam
HU – Hungary	
IT – Italy	
KG – Kirgizstan	
KH – Cambodia	
KZ – Kazakhstan	
LA – Laos	

## Rail Terminals

BCN – Barcelona	STO – Stockholm
BEG – Belgrade	SZV – Suzhou
BUD – Budapest	TIL – Tilburg
CGN – Cologne	TLV – Taulov
CGO – Zhengzhou	WUH – Wuhan
CKG – Chongqing	VNO – Vilnius
CTU – Chengdu	YIW – Yiwu
DUI – Duisburg	
GUI – Guiyang	
HAM – Hamburg	
HEL – Helsinki	
IST – Istanbul	
KOP – Koper	
LOD – Lodz	
LEH – Le Havre	
LIO – Lyon	
MAA – Malaszewicze	
MIL – Milan	
MOW – Moscow	
NSS – Neuss	
NUR – Nuremberg	
RTM – Rotterdam	
SHE – Shenyang	
SIA – Xi’an	

# THANK YOU