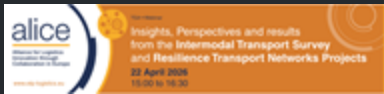


The 2026 Intermodal Transport Survey

Fairy Tales from Logistics

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01 Background & Recap

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03 Fairy Tale On Time Failure

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01

Background & Recap

ALICE Whitepaper issued January 23rd, 2024:

- *“There’s no such thing like modal shift”*
- *Huge perception gap: From “equally competitive” versus “major shortcomings”*

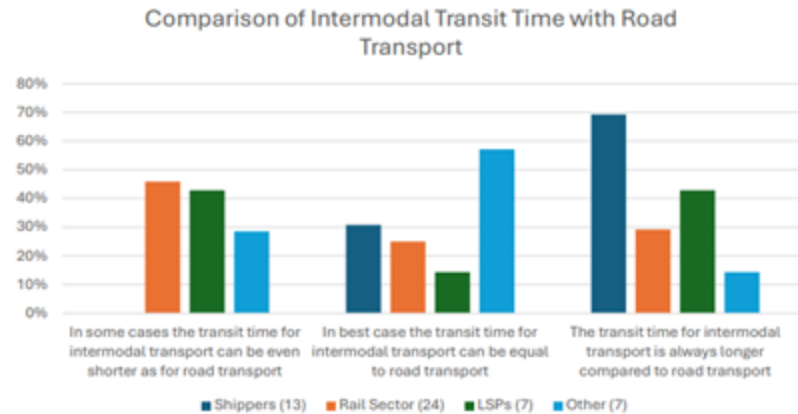


- *Number 1 show-stopper: Lack of integration with other supply chain solutions”.*
- *Toxic combination of perceived complexity and missing transparency.*

02

Fairy Tale Transit Time

- Almost 70% of all shippers think intermodal transport is **always slower**
- More than 60% of all respondents confirm this is a fairy tale



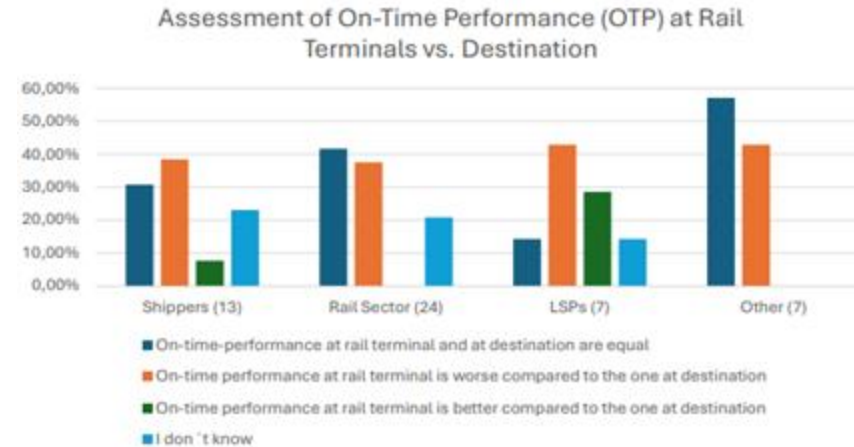
- More than 40% of all LSPs confirm that intermodal can even be **faster**



03

Fairy Tale On Time Failure

- A significant portion of intermodal delays stems from factors outside rail
- $\frac{1}{3}$ of all LSPs confirm that the **on time performance at the rail terminal is better** than the delivery performance



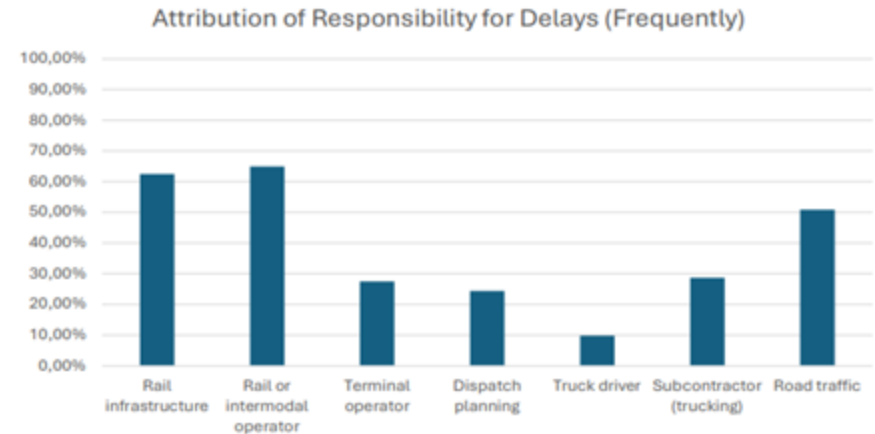
- 43% of all LSPs confirm that it's bad or intentional **last-mile planning** (truck) is frequently causing delays



04

Fairy Tale Responsibility

- All parties see the **responsibility for delays in other supply chain actor´s domain** - backed by lack of transparency
- The rail sector points at infrastructure and trucking
- The LSPs point at the intermodal operators, infrastructure and road traffic



- 43% of all LSPs confirm that it´s bad or intentional **last-mile planning** (truck) is frequently causing delays



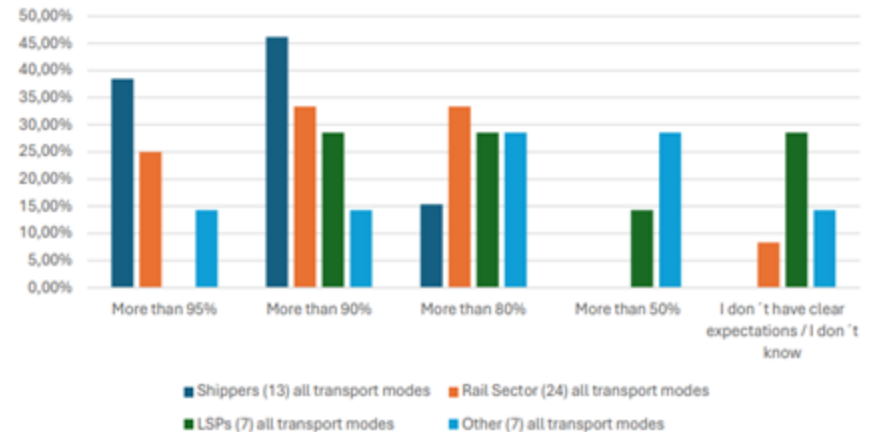
05

Fairy Tale Aligned Expectations (I)

FOR ALL TRANSPORT MODES:

- 84% of shipper expect more than 90% on time deliveries
- **Only 28% of all LSPs share this view**
- 58% of the rail sector would agree (but not for rail and intermodal transport)

What percentage of transports needs to be on time to meet your realistic expectations? (Including road freight, intermodal transport, air freight and any other transport mode)





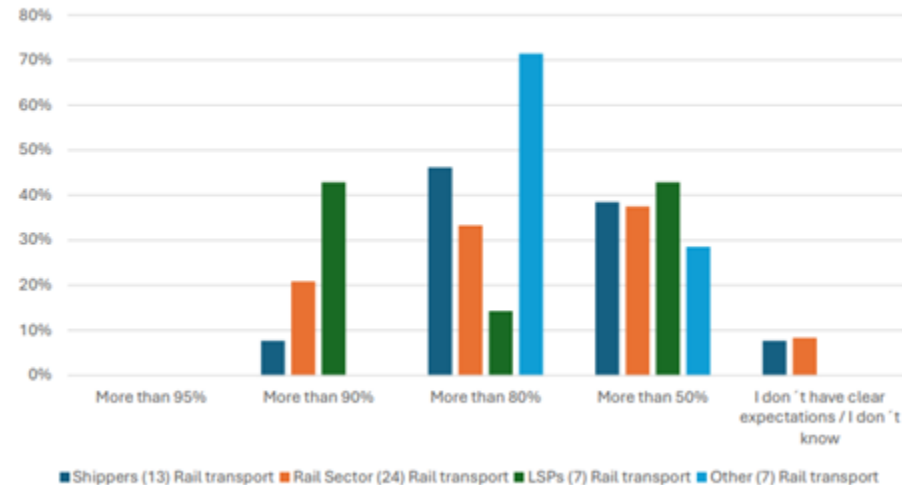
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Fairy Tale Aligned Expectations (II)

FOR RAIL and INTERMODAL FREIGHT:

- Only 7% of shipper expect more than 90% on time deliveries
- **43% of all LSPs have dramatically higher expectations**
- 21% of the rail sector would support these high expectations

What percentage of transports need to be on time to meet your realistic expectations? (Rail transport only)



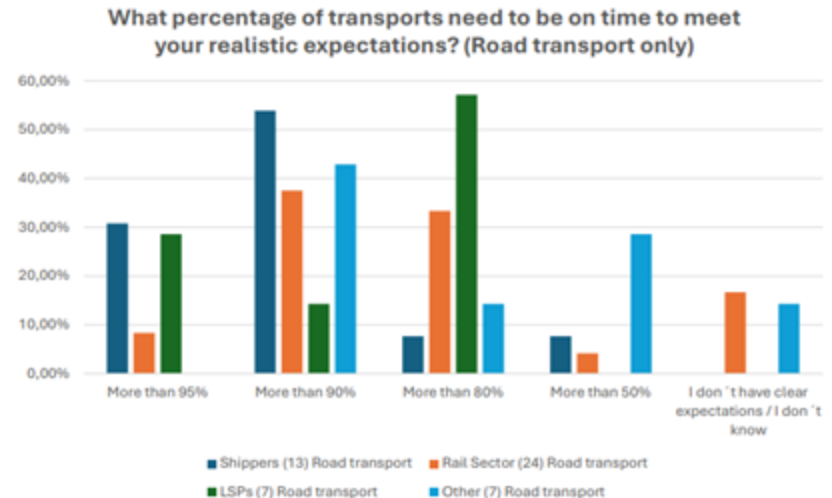


05

Fairy Tale Aligned Expectations (III)

FOR ROAD FREIGHT:

- 86% of shipper expect more than 90% on time deliveries
- **Only 41% of all LSPs share this view**
- 45% of the rail sector would agree for road freight





05

Fairy Tale Aligned Expectations (IV)

Shifting on-time expectations:

- shipper's high on-time expectations drop from 86% expecting > 90% OTIF (road) to only 8% for intermodal freight
- the rail sector has generally lower expectations, however 58% expect more than 90% in general but only 21% do so for intermodal transport
- **while lower shipper's on-time expectations appear to be beneficial for intermodal transport they back-fire twice: many shippers avoid intermodal transport because of that**



06

Conclusion

- **The survey results demonstrate that every stakeholder is living on an island**
- Perceptions and expectations on all important aspects do significantly deviate from each other
- This level of isolation is backed by a huge lack of transparency and data
- The rail sector appears to be focused on its intra-sector competition than on road freight, which appears to be a **strategic error**



07 Call for Action

- 01 **Launch transparency initiatives** with actual performance data shared with all actors of the supply chain (shippers in particular).
- 02 Connect with and integrate into **end-to-end visibility** and logistics platforms.
- 03 Establish common, intermodal performance reporting standards and display the real **transit-time by corridors**, backed by robust schedules for rail freight.
- 04 Continue flagship projects such as DAC and infrastructure investments, but don't you think they will resolve the challenges without the rail sector **changing its mind-set**.



Danke شكراً Tack

ありがとうございます

Teşekkürler Спасибо

Grazie 감사합니다 Obrigado

Thank you

Gracias Tak Merci 谢谢

Takk Dziękujemy Terima kasih

Dankjewel धन्यवाद

Cảm ơn Kiitos