DANUBE conference

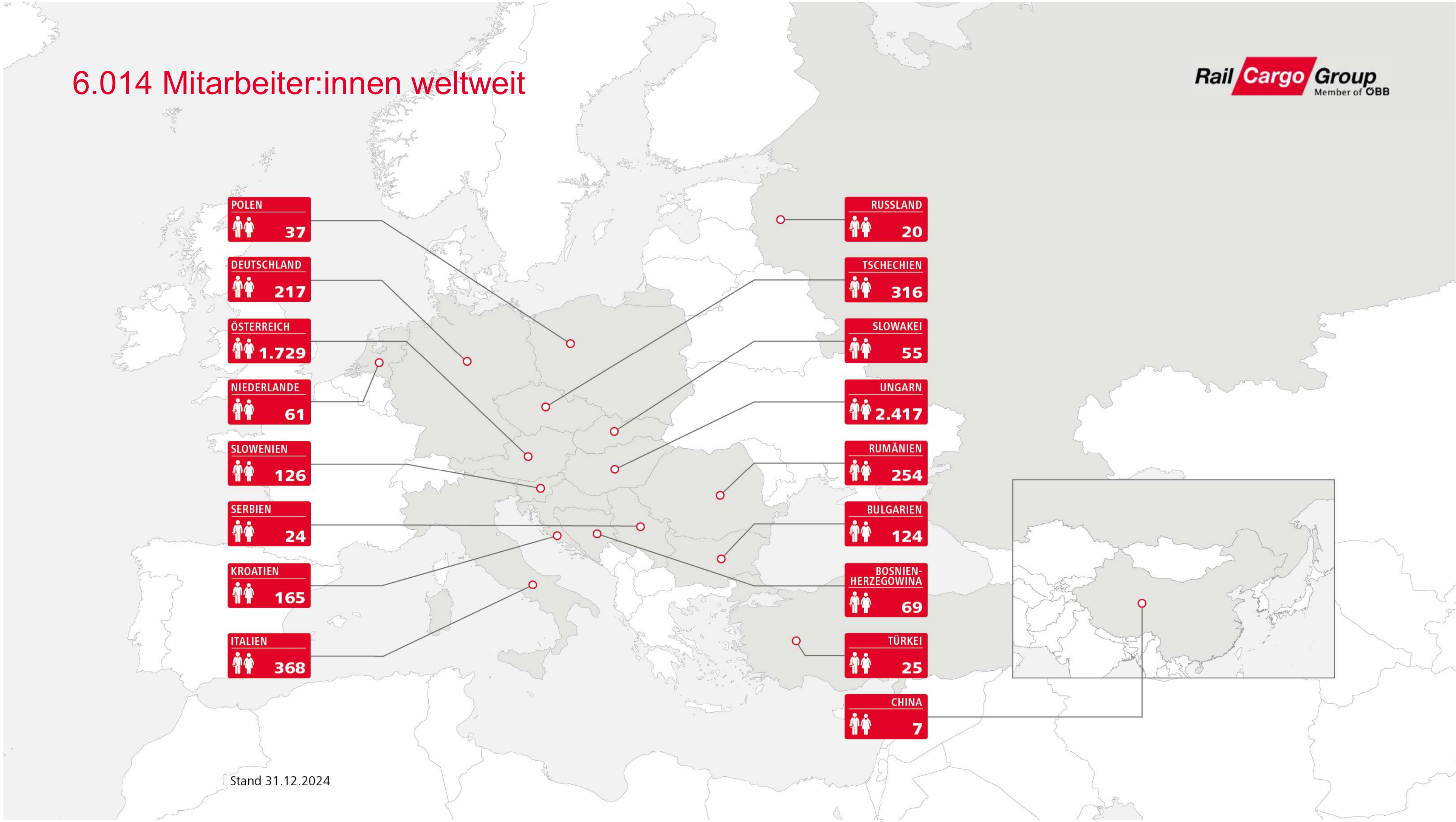
Ljubljana, 10.12.2025

Marko Grsic, Head of RCG Intermodal procurement
Rail Cargo Group

TODAY. TOMORROW. TOGETHER.

WE
ARE
RAILCORE

6.014 Mitarbeiter:innen weltweit



Rail Cargo Operator auf einen Blick

Rail Cargo Group
Member of ÖBB

254 Mio.
Euro
Umsatz

in 8
Ländern präsent

5 Segmente
Kontinental | Maritim | Eurasien
ROLA | Terminals

~ 1,2 Mio.
TEU / Jahr

472
Züge pro Woche

~ 2.700
Güterwagen

~ 75
Angefahrene Terminals & Häfen in EU

~ 260
Mitarbeiter:innen
(inkl. 5 Lehrlingen)

~ 54
TransFER Verbindungen

Stand 31.12.2024

MIKE – die digitale Logistikplattform

Eine Plattform – alle digitalen Services rund um den Transport zentral zugänglich

Laufend neue Funktionalitäten – derzeit Tracking, Capacity Planning & Ordering

Effiziente Kommunikation – zwischen Kunden und Logistikdienstleister

Intuitive User Experience – Dashboard individuell anpassbar

Mehrsprachigkeit – Verfügbar auf Deutsch, Englisch, Ungarisch

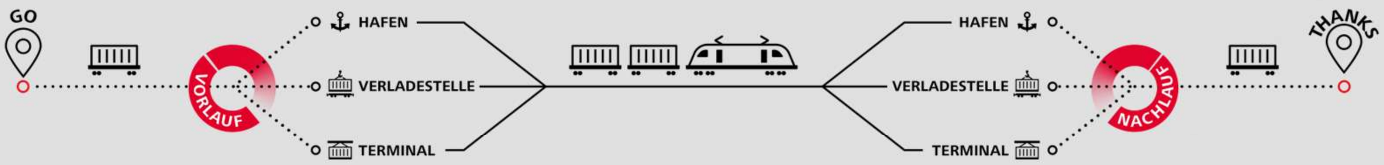
Leistungspyramide Intermodale Leistungen

1 Internationale Traktion

2 Ganzzüge für Kunden / Company Trains

3 Offene Züge / Open Trains

4 Offene Züge inkl. Vor-/Nachlauf auf Schiene (Anschlussgleis)



5 Offene Züge inkl. Vor-/Nachlauf per Lkw zwischen Terminals bzw. Be-/Entladestellen

Combined/intermodal trains = **passenger train** logic

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A unit (container/trailer) in the combined/intermodal transport is like a **passenger** coming to a main station: **it can choose the mode of transport (train vs. truck) and it can choose the departure/arrival time**.

→

Combined/Intermodal trains (RCG TransFERs) are running with regular timetables with ***Cut off*** times → a **deadline**, when the unit needs to be on the terminal/in the port **to catch the next transport mode** in the combined/intermodal transport supply chain.

Longterm strategy (2035) growing a <u>market based </u>business in **Continental** & **Maritime** segments of combined/intermodal transport.
Segments **Eurasia** and **Rola** are determent by governmental subsidies.

- **Continental:** the **biggest** overall potential in EU railway industry.
- **Maritime:** steady volume & growth – ca. 80% of all intermodal volume in EU.

- **Eurasia:** subsidized by Chinese government (transport platforms).
- **Rola:** subsidized via Austrian (local) government(s).

Economic trends of combined transport: Continental and Maritime segments

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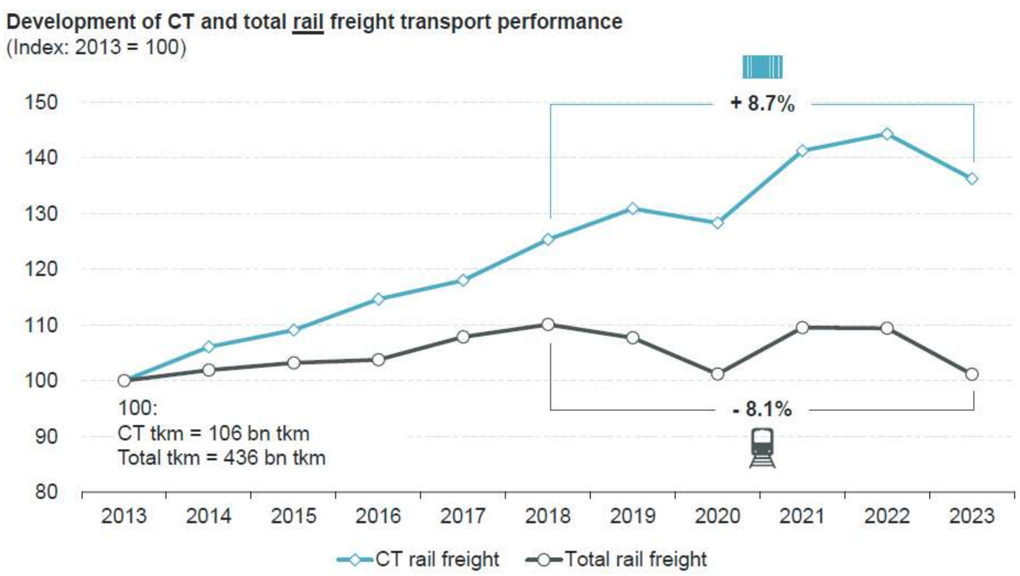
- Combined transport grew by 9% between 2018 and 2023, despite total rail freight transport decreased by 8% in the same period.

- **Combined transport accounts for one in three train kilometers of rail freight transport** (unofficially closer to half) – official UIRR source.



Intermodal/combined rail transport forecast: 3% growth per year until 2040

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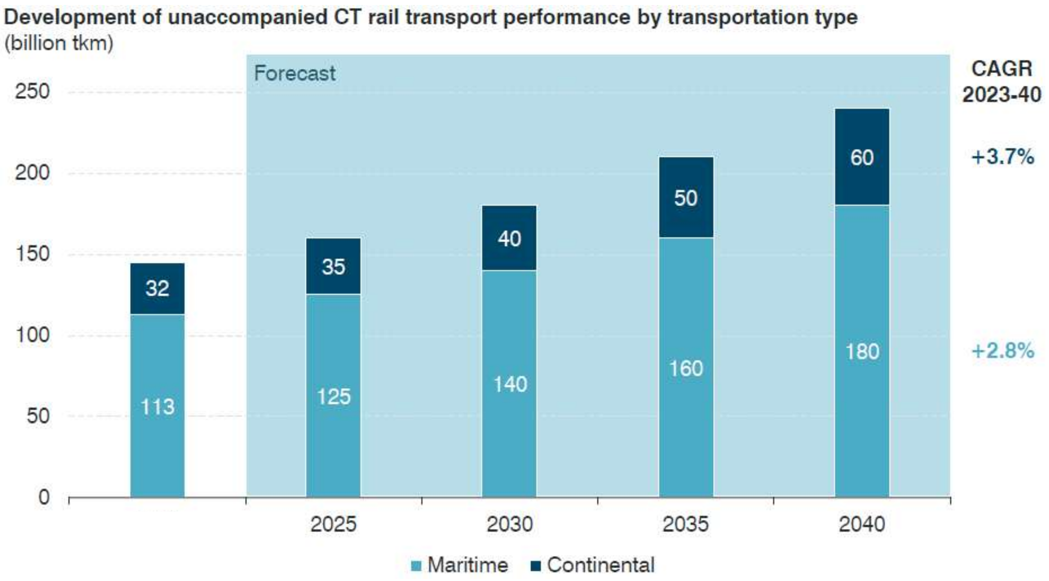
- By 2040, the total intermodal rail market will be **70%** bigger than in 2023.

- **Continental** transport will grow at even higher rate than the overall intermodal rail market, and is predicted to **double (grow for 100%)** by 2040:
  - **From ca. 32 billion train km in 2023 to ca. 60 billion train km by 2040**
  - **By 2035, BU IM to reach 1 billion € turnover**.



TransNET – Unser Netzwerk aus TransFER Verbindungen, Kombinationen und individuellen Routen von Europa bis nach Asien

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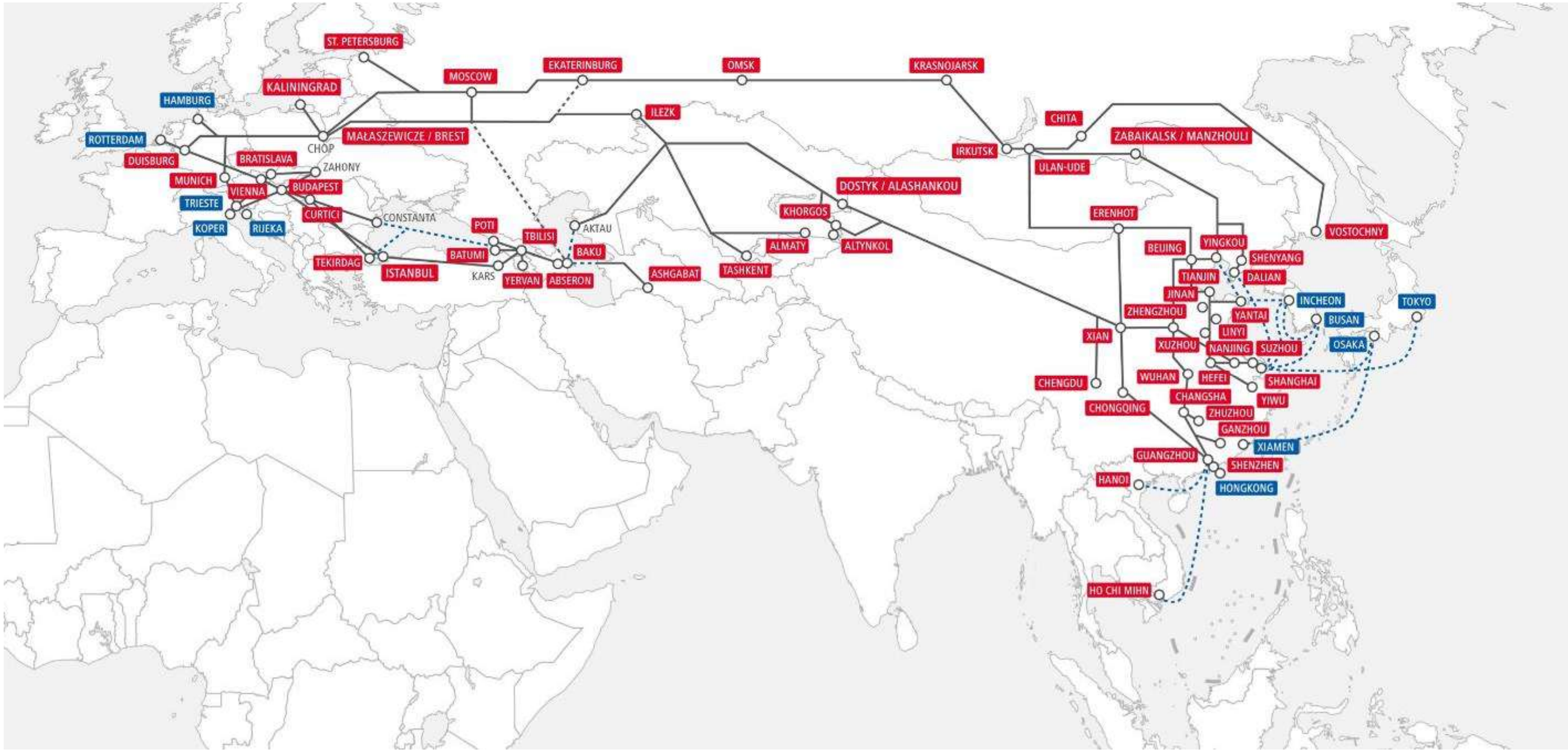
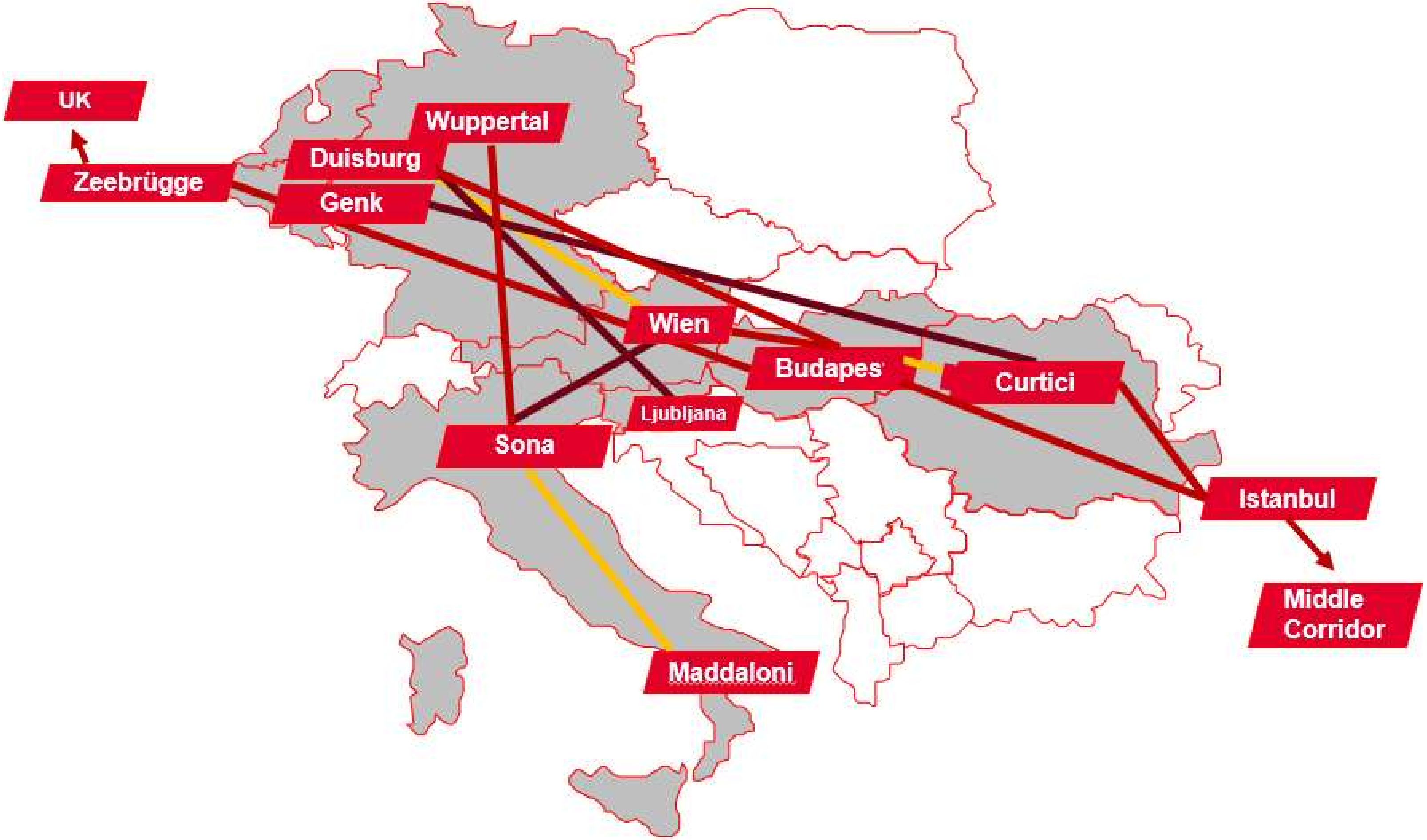


RCG Continental Intermodal network



Status RCG segment Continental

Challenges → Opportunities

- <u>Key for Continental growth:</u> **No cancellations.**
  Competing with **cheap and flexible road transport**
  and **deviations in terminal operations**.

1. **Short-Term**: **<u>grow with Quality</u>** → focus on Improving Quality and keeping customers.
2. **Mid-Term:** after **implementation of the new quality standard**, focus on developing new traffics on existing network.