

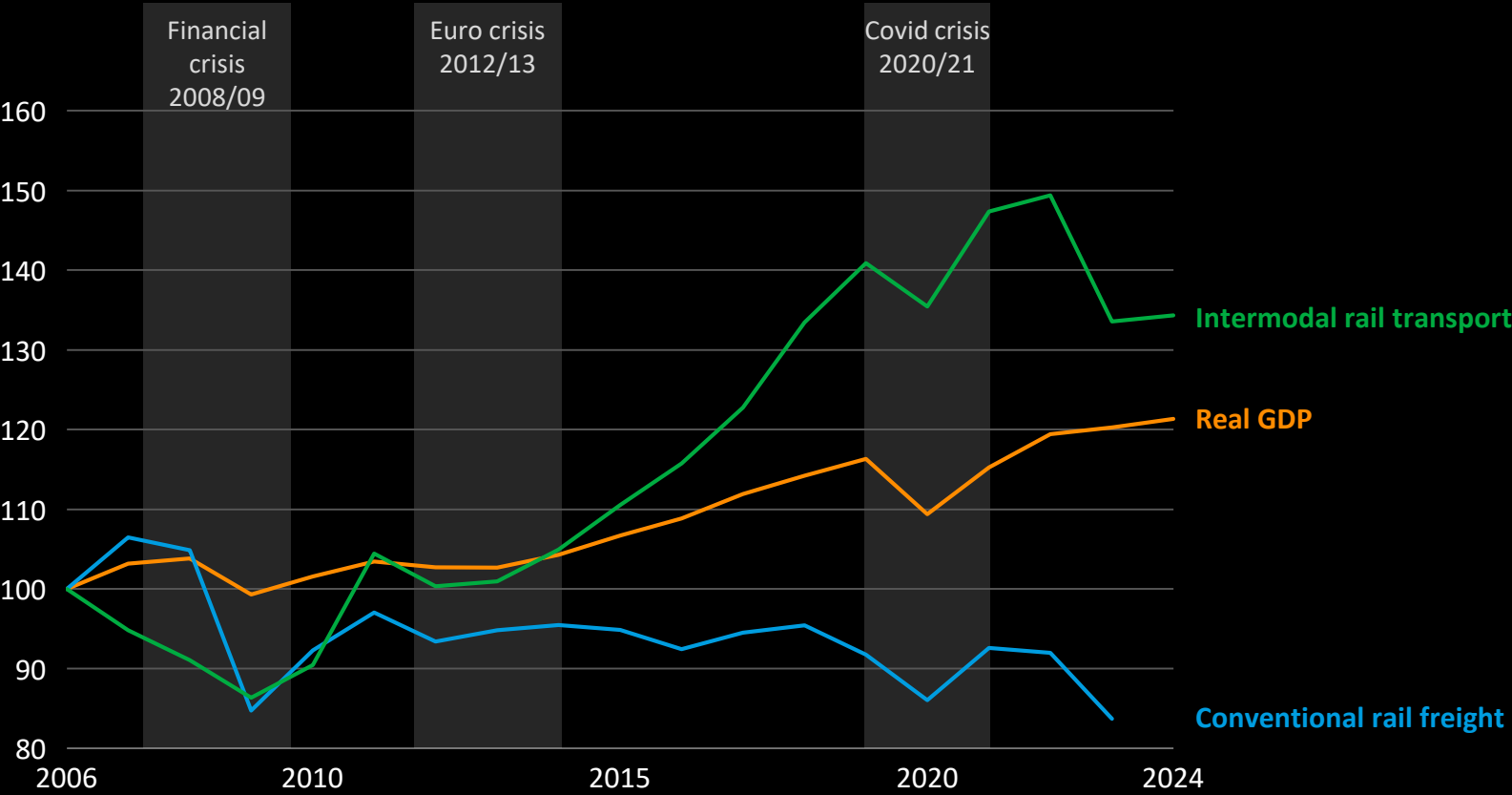
Winning intermodal

How digitalization can contribute to success

May 2025

THE GROWTH IN INTERMODAL TRANSPORT HAS BEEN DECLINING IN RECENT YEARS

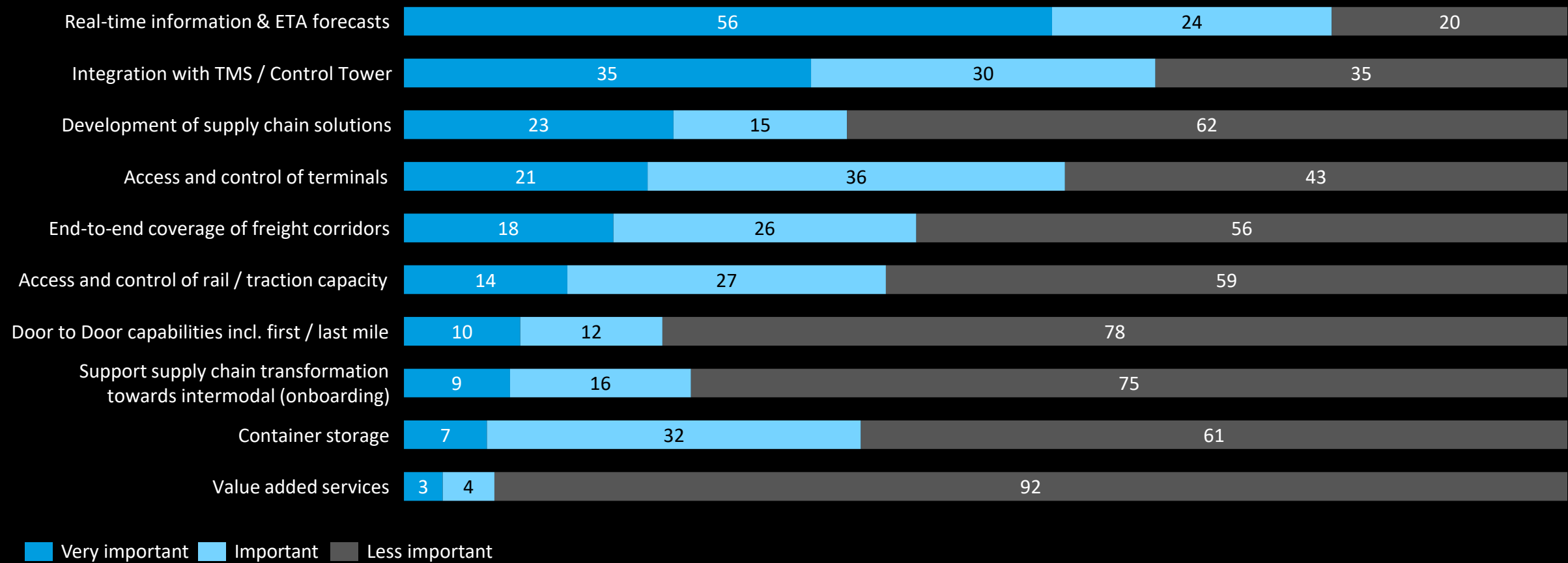
Development European rail freight volume (in BN ton-kilometers, indexed) and GDP (real, indexed)
Index level: 2006 = 100



2024 estimated based on Eurostat quarterly figures and UIRR quarterly reports 2024; 2024 conventional rail freight not available Source: UIRR, Eurostat, Oxford Economics, Oliver Wyman

DIGITAL SERVICE FEATURES ARE ESSENTIAL FOR A COMPETITIVE OFFER

Top 10 requirements intermodal transport operating model (in percent)



Source: Oliver Wyman survey with 45 survey participants and 18 interviews

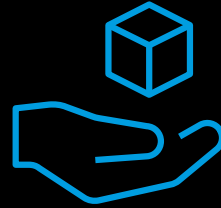
FOR POTENTIAL NEW CUSTOMERS EASY ACCESS TO THE INTERMODAL IS CRUCIAL DIGITAL PLAYS AN IMPORTANT ROLE

Easing access to intermodal transport for new customers through:



Broad offering

Broad intermodal network across several corridors with one partner reduces complexity for new customers



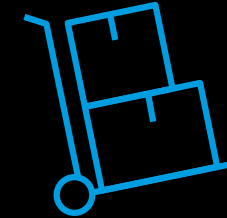
Individual intermodal solutions

Solution expertise for the development of individual intermodal solutions, tailored to the requirements of the respective industry



Digital integration

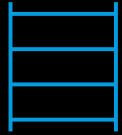
End-to-end digitalization of the customer interface for better integration, coordination and provision of information for customers



End-to-end service provision

Offering/coordinating first and last mile services, as well as value-added services to facilitate the switch to intermodal transport

THE INDUSTRY MUST ADDRESS VARIOUS LEVERS TO SECURE INTERMODALITY AND DIGITAL INTEGRATION IS ESSENTIAL



Infrastructure

- Seamless management of European transport corridors via
 - Integrated planning of slots (incl. construction) and proactive rerouting solutions
 - European crisis and incident management (EIU/EVU)
- Expansion of capacities at bottlenecks as well as active capacity management



Traction

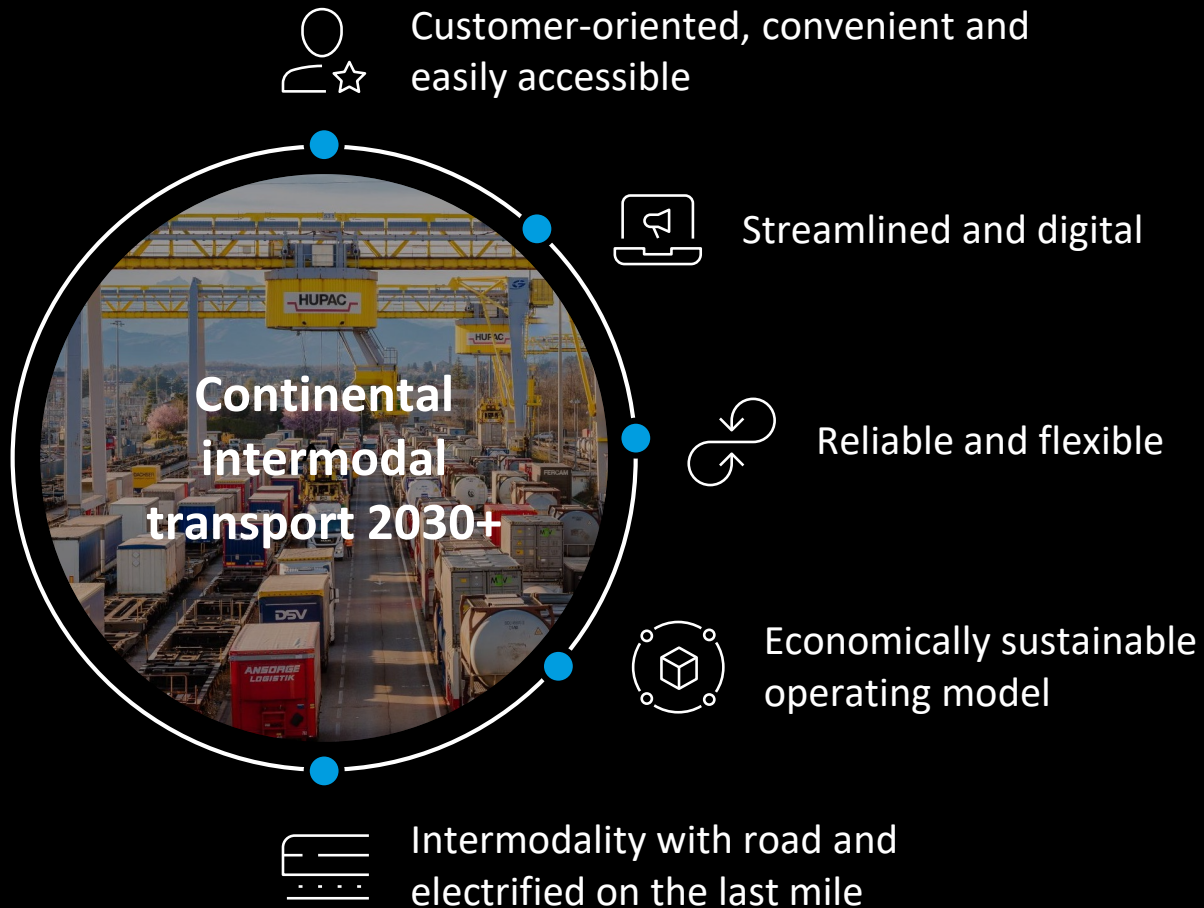
- Revamping operating models via
 - Streamlining processes and operations
 - Flexibilization of resource allocation
 - Efficient corridor production
- Close integration with intermodal transport operators to minimize overlap and enhance customer service



Intermodal transport operators

- End-to-end digitalization to enhance the integration of the supply chain and improved information/transparency for customers
- Solution competence in growth sectors and strategic partnerships with logistics firms to expand growth corridors
- Capital investments in terminal infrastructure within underdeveloped growth markets

IF SUCCESSFUL, INTERMODAL TRANSPORT CAN RETURN ~~AND BECOME~~ A CENTRAL ENABLER FOR THE MODAL SHIFT



1st
choice >650 km
among the transport carriers

100%
CO₂ free
door-to-door delivery

5+%
growth in intermodal p.a.
Contribution to modal shift



A business of Marsh McLennan