

European rail freight at a crossroads: no new legislation, implementation

European rail freight leaders have called for urgent action to deliver the reliable cross-border services needed to support Europe's competitiveness and resilience. Meeting in Vilnius at the annual High-Level Freight Meeting organised by the Community of European Railway and Infrastructure Companies (CER) and the International Union of Railways (UIC), and hosted by LTG Cargo, they urged policymakers and the sector to turn Europe's regulatory and investment ambitions into practical improvements across the rail freight network.

Geopolitical instability, growing defence requirements, energy insecurity, climate-related disruption, and hybrid and cyber threats have heightened rail freight's strategic importance. Yet the latest Eurostat figures show a fourth consecutive annual decline in EU rail freight volumes, falling by 1.8% in 2025 from 375.1 billion to 368.2 billion tonne-kilometres. Rail freight activity decreased in 16 EU countries and increased in only eight, underlining the need to address the barriers affecting the sector's competitiveness.

A new CER-commissioned study on European rail freight competitiveness, presented to and discussed by rail freight CEOs in Vilnius, examines why the sector is losing ground. It identifies reliability and service quality as central commercial challenges, affected by network disruption, unstable capacity allocation, delayed infrastructure upgrades, and labour and skills constraints. Its central finding is that competitiveness now depends mainly on faster and better implementation, so that existing frameworks for capacity, TEN-T (Trans-European Transport Network) and State-aid deliver for freight in practice, alongside targeted investment and technical migration.

Drawing on the study, customer input and sector expertise, the Vilnius Conclusions set out a shared framework for action:

- **Deliver dependable cross-border capacity** through early and effective implementation of Regulation (EU) 2026/1184, with better multiannual planning, European coordination and disruption management.
- **Protect freight during infrastructure works** through earlier coordination, better information and commercially usable diversion routes.
- **Provide stable conditions and adequate investment** for TEN-T compliant freight corridors, infrastructure, terminals, private sidings, first- and last-mile connections and rolling stock.
- **Accelerate interoperable technical and digital solutions** with support for joint, sector-led innovation and coordinated deployment of key performance-enhancing technologies such as the European Rail Traffic Management System (ERTMS) and digital automatic coupling (DAC).
- **Strengthen European preparedness** through investment in dual-use infrastructure, terminals and rolling stock that meets military mobility needs while safeguarding commercial freight capacity.

The meeting, which gathered representatives of European institutions, NATO, the railway sector, freight customers and logistics organisations, also highlighted the role of sector-led technical and digital solutions. UIC presented practical work on data exchange, international freight corridors, interoperability, operational resilience and workforce skills. These

discussions will feed into UIC's new Freight Roadmap for more competitive, interoperable and resilient international freight.

Customers buy an end-to-end transport service, not simply a train path. Competitive rail freight therefore relies on effective links between ports, terminals and the rail network, commercially usable capacity, first- and last-mile connections and timely information across the logistics chain. These priorities require shared responsibility: Public authorities must ensure that regulatory and investment frameworks deliver tangible results, while railway undertakings, infrastructure managers and logistics partners must deepen operational cooperation and improve service quality.

CER Executive Director Alberto Mazzola said: *"Europe needs rail freight to support industrial competitiveness, climate goals and military readiness, but this requires reliable, competitive services. CER is calling for practical action: better coordination of temporary capacity restrictions; early implementation of the new Capacity Regulation with cross-border pilots; faster authorisation and permitting; progress on the Combined Transport Directive; and rules on road vehicle weights and dimensions that do not weaken rail. As Lithuania prepares for its Council Presidency, the message from Vilnius is clear: Europe must turn legislation and ambition into results."*

UIC Director General François Davenne said: *"Rail freight must play an increasingly strategic role for Europe. Together with CER, UIC is strengthening cooperation across the sector to address common challenges and develop practical solutions. Efficient cross-border operations, interoperable data exchange, digitalisation and automation are essential to making international freight corridors more competitive and resilient. The discussions in Vilnius will also contribute to UIC's new Freight Roadmap, developed with our members to focus collective efforts on the technical, digital and operational solutions needed to strengthen international rail freight."*

LTG Cargo CEO Eglė Šimė said: *"The discussions held in Vilnius demonstrate that rail freight is becoming an increasingly important strategic capability for Europe. For Lithuania, this topic is particularly relevant. As a country located on the EU's eastern flank, we experience first-hand how closely economic resilience, supply chain security, military mobility and connectivity are interconnected. The transformation of freight flows in recent years has highlighted the need for stronger international rail corridors and closer cooperation between infrastructure managers. The challenges facing European rail freight require coordinated action and a shared commitment to developing a rail network that is competitive, resilient and fit for future needs."*

For further reading

The Vilnius Conclusions adopted by rail freight CEOs are available [here](#). The Economic Study on the European Rail Freight Sector, prepared by Rel-I with the support of Ecorys and Prof. Oliviero Baccelli, is available [here](#).

Notes to editors

- More than half of European rail freight crosses at least one national border.
- Rail's share of EU inland freight declined from 18.8% in 2014 to 16.6% in 2024.
- More than 500 priority infrastructure projects have been identified along the EU's four priority Military Mobility corridors.
- EU ports handle approximately 74% of the Union's external trade, underlining the importance of effective rail-port connections.
- Rail can move large volumes and heavy loads efficiently while using less energy and producing significantly fewer emissions than road transport.



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About CER

The Community of European Railway and Infrastructure Companies (CER) brings together railway undertakings, their national associations as well as infrastructure managers and vehicle leasing companies. The diverse and comprehensive membership made up of long-established bodies, new entrants and both private and public enterprises, covers the large majority of the rail infrastructure network, rail freight business and rail passenger operations in EU, EFTA and EU accession countries. CER represents the interests of its members towards EU policy makers and transport stakeholders, advocating rail as the backbone of a resilient, competitive, and sustainable transport system in Europe. For more information, visit www.cer.be or follow us on social media.

About UIC

UIC is the worldwide organisation for the promotion of rail transport at a global level and for the collaborative development of the railway system. It brings together more than 200 members across all 5 continents, and includes rail operators, infrastructure managers, railway service providers, and more. UIC maintains close links with all stakeholders in the rail transport sector around the world, including manufacturers, railway associations, and public authorities, as well as with other domains and sectors whose experiences may be beneficial to rail development. UIC's main missions include understanding the business needs of the rail community, developing innovative programmes to identify solutions to these needs, and preparing and publishing documents such as reports, specifications, guidelines, and IRSs that facilitate the implementation of innovative railway solutions.