

RAIL FREIGHT MARKET OVERVIEW

JANUARY 2023

DHL Global Forwarding – Excellence. Simply delivered.



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Capacity, Rates and Equipment situation China-Europe Westbound & Eastbound



Westbound

CHINA HUBS	TRAIN CAPACITY	RATES
General	●	=
Xi'an	●	=
Chengdu	●	=



Eastbound

CHINA HUBS	TRAIN CAPACITY	RATES
General	●	+
Xi'an	●	=
Chengdu	●	=

Accurate forecasts with predictable volume is crucial for delivery speed (during Christmas and Chinese New Year period)

Remarks

- Station to station transit times reliable and short: 14 days to Poland, and 18-20 days to Germany
- Rail freight costs generally stable
- Train capacity tight in Xi'an port in the first half of January
- ETD delay in Chengdu hub due to backlog from November 2022

Remarks

- Eastbound train capacity available
- Short booking to ETD time: departure within 7-12 days from the booking
- Rates stable
- Chinese New Year (starts 22nd January) holiday period will impact delivery & operations in China

Capacity



Rates



Capacity, Rates and Equipment situation China-Turkey, Central Asia



Turkey

CHINA HUBS	CAPACITY	RATES
General	●	=



Central Asia

CHINA HUBS	CAPACITY	RATES
General	●	=
Suzhou	●	=
Jinhua	●	=



Russia

CHINA HUBS	CAPACITY	RATES
General		
South China		
East China		

Service suspended

Remarks

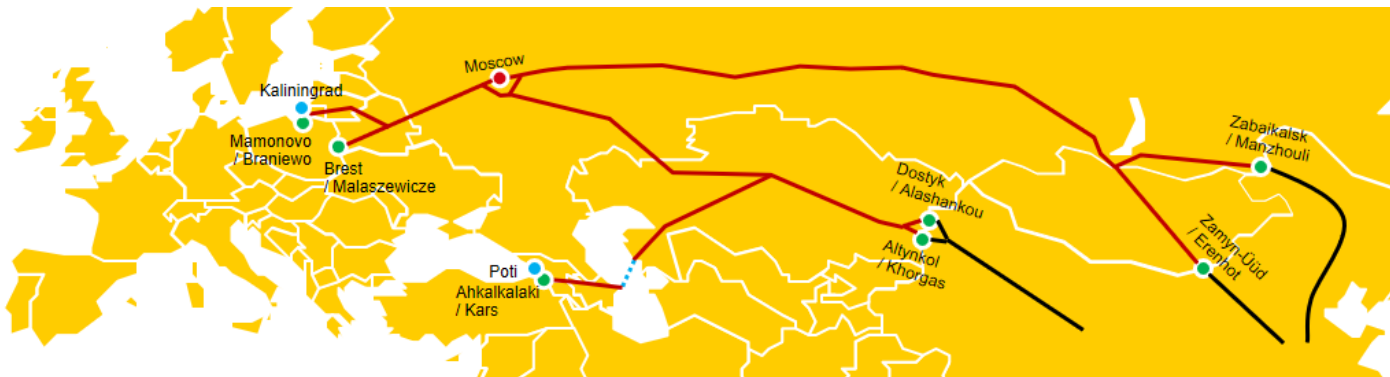
- Service to Central Asia available with limited capacity;
- Train space available to Turkey
- Eastbound service from Russia and Turkey to China – on request
- Middle Corridor (2 Seas) continuous development

Capacity Very tight (Red circle) Tight (Yellow circle) Available (Green circle)

Rates Strong increase (+) Moderate increase (+) No change (=) Moderate decline (-) Strong decline (-)

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
- 1520-Road hubs in Europe
- 1520-Sea hubs

Transit times via the main cross-border points

Westbound (China to Europe)

China Outbound		Europe Inbound	
Alashankou	Khorgos	Malaszewicze	Braniewo
~2.1 days	~4.0 days	~1.7 days	~1 day

Eastbound (Europe to China)

Europe Outbound		China Inbound	
Malaszewicze	Kaliningrad	Alashankou	Khorgos
~6.5 days	~3.5 days	~3 days	~1.8 days

Container transit times

- <3 days
- 3-6 days
- > 6 days

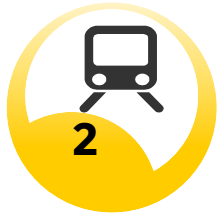
*Transit time in days is an average based on DHL GPS system data and rail carrier's daily tracing report

MARKET UPDATES



15,162 China-Europe block trains, Westbound & Eastbound, have been arranged from January to November 2022, according to China Railway.

Comparing with 2021, total number of trains in eleven months of 2022 grew by 10%. Container volume grew by 11% and reached 1.475 million TEU.



Uzbekistan has dispatched first freight train to Europe – informed Uzbekistan Railways on 19th January 2023.

Train loaded with ninety one 20' containers uses Middle Corridor to deliver copper to Turkey, from where it is distributed to European importers. Route bypasses Russia, and leads from Uzbekistan through Turkmenistan, Caspian Sea, Azerbaijan, Georgia, Black Sea to Bulgaria, where cargo is reloaded in the Varna port onto the train to Turkey.

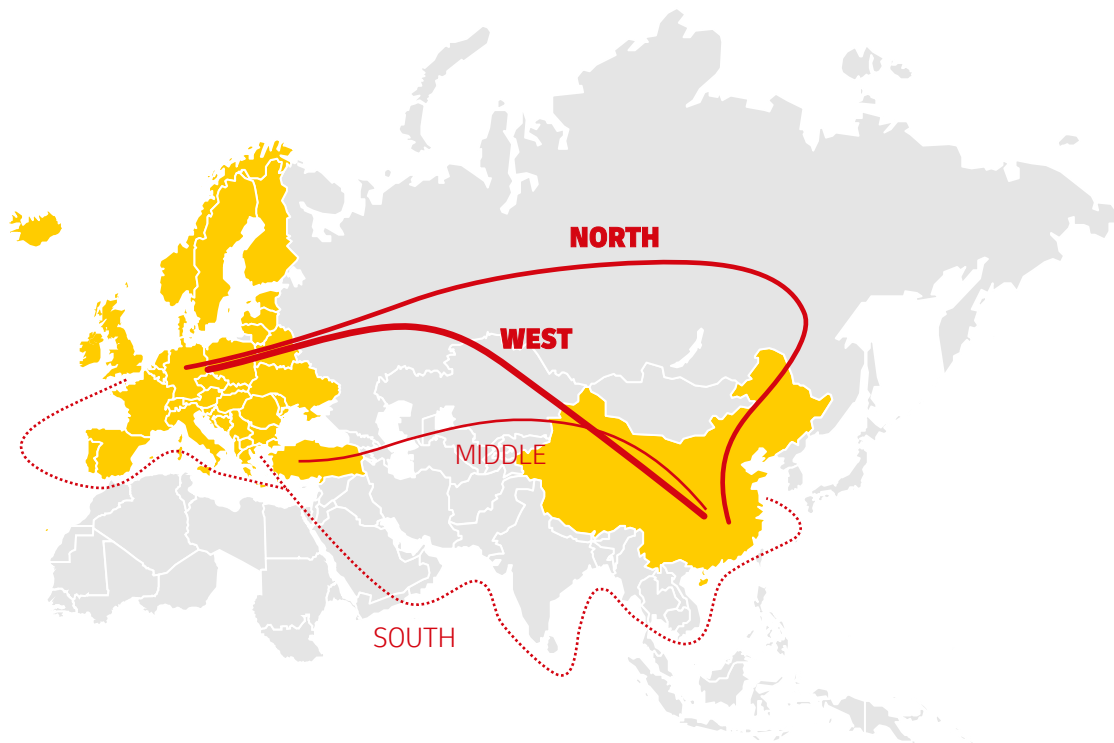
RAILWAY ROUTING

DHL GLOBAL FORWARDING



Fast and reliable connection between Asia & Europe

Major Rail & Multimodal corridors



In response to the demand for **resilient network** and steady **search for new transport solution**, DHL Global Forwarding offers 4 main Rail and Multimodal routings:

West Corridor: 20-26 days

Main route: CN-KZ-BY-PL

Fastest options for FCL/LCL

North Corridor: 20-26 days

Main route: CN-RU-BY-PL

Middle Corridor: 50-60 days

(South/Trans-Caspian/TMTM)

Main route: CN-KZ-Caspian Sea-AZ-GE-TR-Europe

Bypass Russia by Rail

South Corridor: 32-36 days

Main route: CN-MedPorts-Europe

Faster than standard Oceanfreight

Book your shipment at the scheduled routings



Name	Chengdu Block Train	Xi'an Express Train	South Corridor Service
Origin	Chengdu, Sichuan, CN	Xi'an, Shaanxi, CN	Ningbo, Taicang, Shenzhen, CN
Destination	Malaszewicze, PL; Hamburg & Duisburg, DE; Milan, IT; Budapest, HU	Hamburg & Duisburg, DE	Koper, SI; Barcelona, ES; Rotterdam, NL;
Transit Time	12 days – to Malaszewicze 18 days – to HAM / DUI / MIL / BUD	13 days	19 days Shenzhen-Koper; 29 days Shenzhen- Rotterdam*
ETD	Weekly	Weekly	Biweekly
Route	West Corridor: CN-KZ-RU-BY-PL	West Corridor: CN-KZ-RU-BY-PL-DE	South Corridor: CN-SI/ES/NL
Remark	<ul style="list-style-type: none"> Multiple destinations in Europe 	<ul style="list-style-type: none"> First scheduled train on the market Shortest transit time to Germany 	<ul style="list-style-type: none"> Multimodal service: Sea+Rail/Truck Route bypassing Russia

* For full schedule please contact your DHL sales representative

Terminology & Abbreviations

Terminology

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

Countries

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

TJ – Tajikistan
 TR – Turkey
 UA – Ukraine
 UZ – Uzbekistan
 VN – Vietnam

Rail Terminals

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

THANK YOU