

Position Paper

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European port strategy

Ports are Europe's gateway to the world.

They drive the EU economy, create jobs, enable trade, connect regions, support the industry, and secure energy supplies. **As key hubs, they are vital to Europe's transport network and strategic autonomy.**

On January 17, 2024, the European Parliament called for a European port strategy, focusing on security, foreign influence, energy transition, and competitiveness.

The European Commission will release this strategy in 2025. CER welcomes this and highlights the key role of rail, especially combined transport, block trains and single-wagon load, in port connectivity.

Rail is vital for ports' competitiveness. As Stéphane Raison, General Director of HAROPA Port, aptly put it, the battle of the ports will be fought on land.¹ Rail is also vital for cutting emissions and strengthening Europe's resilience amid geopolitical challenges. Improving the synergy between ports and the rail sector is a way to increase the modal share of rail. Hence, a European port strategy that boosts rail connectivity is in line with the European Green Deal's objectives, the Sustainable and Smart Mobility Strategy (SSMS), the TEN-T Regulation, and the Action Plan on Military Mobility.

Despite its benefits, **the share of rail traffic remains low in many European ports. To fully leverage rail for both civil and military transport, it must become a key part of the European port strategy.**

This strategy should set clear measures to raise rail's market share at ports to at least 30%.

¹ Fostering the railway sector through the European Green Deal: rail-port synergies, ERA

1. Current modal share of rail at various key European ports

The table below highlights various key European ports, their TEU volume for 2024, and rail's share in containerized transport.

Port	Country	TEU (2024)	Rail share (%)
Port of Rotterdam ²	Netherlands	13.82 million	8.9%
Port of Antwerp-Bruges ³	Belgium	13.53 million	10.0%
Port of Hamburg ⁴	Germany	7.76 million	50.2%
Port of Valencia ⁵	Spain	5.47 million	8.5%
Port of Algeciras ⁶	Spain	4.76 million	5.0%
Port of Piraeus ⁷	Greece	4.82 million	2,0%
Port of Bremerhaven ⁸	Germany	4.61 million	50.0%
Port of Barcelona ⁹	Spain	3.90 million	10.2%
Port of Gioia Tauro ¹⁰	Italy	3.90 million	~5-8%
HAROPA Port (Le Havre, Rouen, Paris) ¹¹	France	3.10 million	~5-10%
Gdansk ¹²	Poland	2.25 million	35.0%

This overview highlights a limited selection of ports as examples and illustrates that many European ports still need to increase rail's share. Other ports, such as the Adriatic ports of Trieste, Koper, Rijeka, are not included in this list, but are equally important for European connectivity.

Variations in rail's modal share stem from factors such as insufficient 740m-train infrastructure in some countries and geographical advantages in others. For example, Rotterdam and Antwerp benefit from direct inland waterway connections via the Rhine. This boosts the share of inland waterway transport.

The following measures to enhance rail's share apply to all European ports, including those in Central Eastern (CEE), and Southeast Europe (SEE), which are integral to the European Transport Corridors. Due to their distinct role, different objectives and measures shall apply to transshipment ports.

² Figures validated by Port of Rotterdam

³ Figures validated by Port of Antwerp-Bruges

⁴ Figures validated by the port of Hamburg

⁵ Figures validated by port authority of Valencia

⁶ Estimate based on confirmed numbers by the port. In 2024, rail had a share of 4,93% in gateway traffic (import/export; full and empty containers; 640k TEU).

⁷ Figures validated by Piraeus Europe Asia Rail Logistics S.M.S.A.

⁸ <https://de.statista.com/statistik/daten/studie/547786/umfrage/modal-split-im-containerer-hinterland-verkehr-des-seehafens-bremerhaven/>

⁹ Figures validated by port of Barcelona; Decrease from 13.1% (2023) to 10% (2024) due to rail infrastructure renovation, especially those concerning port connections.

¹⁰ TEU figures based on assoporti processing on Port System Authority data, rail share as estimate.

¹¹ Figures confirmed by the port of HAROPA

¹² Figures confirmed by the port of Gdansk

2. Optimize European supply chains through expanding rail traffic share in European ports

For optimised European supply chain management, EU-wide coordination of transport infrastructure development with a focus on multimodality is key. Ports must be central to an integrated, multimodal European logistics system.

All modes of transport – deep-sea shipping, short-sea shipping, inland waterways, road and especially rail – along with their respective infrastructure needs, should be considered through an integrated approach.

Investing in rail infrastructure at European ports aligns with the European Green Deal's objective to reduce greenhouse gas emissions in transport and shift freight to more sustainable modes. A port strategy that boosts rail connectivity supports the targets of the Sustainable and Smart Mobility Strategy, especially by enabling multimodal freight solutions and helping double rail freight volumes by 2050.

Expanding rail traffic share in European ports will require the following measures:

- Extend on-site rail and handling infrastructure and implement IT-supported track management in ports

Port owners and operators must ensure sufficient on-site loading tracks, including piers for direct ship-to-rail transfer, sidings for 740m long trains, and shunting yards, covering containers, semi-trailers, bulk goods, and other products such as automotive and liquids. An efficient IT-supported system should manage loading tracks and, eventually, enable joint booking of loading slots and track capacity. In addition, to promote the onward transport of semi-trailers by rail, investments should be directed toward transshipment facilities as part of port infrastructure. This is essential, as a significant share of intercontinental freight is currently moved using unaccompanied semi-trailers loaded via the roll-on/roll-off method. Building efficient facilities with direct access to the national rail network will support the development of combined transport rail services to and from ports. European and national funding can incentivize port owners to enhance on-site rail capacity.

- Integrate rail infrastructure planning in port capacity expansion

Port capacity expansion must be closely linked with the expansion of surrounding rail infrastructure. Future EU-funded studies on port capacity expansions should include environmental analyses, covering both, upstream road and rail infrastructure, as well as the port's access and discharge routes, often not owned by the port itself. Rail infrastructure contractors should be involved in port expansion projects to identify potential rail network bottlenecks early, preventing congestion caused by increased volumes at the port.

- Swiftly implement the European Transport Corridors (ETCs) to improve port access and hinterland connectivity

Along with the immediate expansion of rail infrastructure around ports, port access routes and hinterland connections must also be considered, as they are often part of ETCs. The EU port strategy should align with the TEN-T Regulation, which must be swiftly implemented to strengthen corridors linking ports to the European rail system. Currently, some ETCs cannot reach their full potential due to outdated and limited rail infrastructure near ports, causing significant capacity constraints.

- Improve rail-road terminal infrastructure.

Sufficient rail-road terminal infrastructure along European Transport Corridors is crucial to support the distribution of goods from deep-sea ports. New or expanded intermodal terminals are especially needed on the Scandinavian – Mediterranean ETC, the Western Balkans – Eastern Mediterranean ETC, and the Rhine – Danube ETC to manage growing traffic flows from these ports.

- Enhance coordination with third countries on non-EU rail infrastructure

Some strategically relevant ports, either outside EU territory (e.g., Tekirdağ, Turkey) or with access routes through non-EU countries (e.g., Piraeus and Thessaloniki in Greece, passing through Serbia and North-Macedonia) are crucial for ETCs. The EU should enhance coordination with these third countries and provide significant infrastructure funding to improve rail transport flows to and from these key ports.

- Reduce port-related costs to boost rail competitiveness

Total port fees — handling fees for shunting, transshipment, and administration — are significant cost factors in the transport chain, impacting rail transport costs to and from ports. This, in turn, influences shippers' decisions on whether to transport goods by rail or road. Introducing, where feasible, competition among service providers in ports, such as having multiple railway operators offer shunting services, would, in some cases, depending on the size of the port, reduce costs and lower rail transport prices. In addition, targeted investments are needed to optimise port processes and eliminate last-mile operations where feasible — for example, by extending electrification into terminals or designing new infrastructure with low operational costs in mind. Moreover, shunting and transshipment costs should be compensated through operating aid.

- Ensure an ambitious revision of the Combined Transport Directive

As many combined transport operations begin and end in ports, an ambitious revision of the Combined Transport Directive, aimed at enhancing

modal shift to more sustainable intermodal operations and lowering combined transport costs, would increase the market share of rail in ports. Consequently, public funding should be directed to promote better connections between rail and the EU ports. Therefore, the current provision in the Directive that limits road legs to ports within a 150km radius (Art. 1c (2)) should be maintained. Removing this provision would allow intermodal operations involving long-distance legs to ports become eligible for public funding, creating an incentive to circumvent rail and inland waterway connections to ports, thus counteracting the desired effect the revision of the directive aims to achieve.

3. Protect EU sovereignty and security by actively supporting European management control over ports and by enhancing resilience

Foreign investment in Europe is important because it drives economic growth, creates jobs, and strengthens innovation and competitiveness across the EU. At the same time, foreign investments in European ports pose risks to sovereignty and security in several ways. When third-country entities control key infrastructure, the EU's strategic interests and security could be affected. Foreign control may be leveraged for geopolitical gain, undermining the EU's authority over vital assets.

Economically, allowing third country entities to control multiple European ports could lead to market concentration, fostering monopolistic behaviour and limiting competition. This could disrupt supply chains and reduce reliability for EU businesses, as foreign investors might prioritise their own logistics.

In terms of environmental and societal impact, foreign investors may not be aligned with the EU's long-term goals, such as reducing carbon emissions, improving social standards, or fostering regional development, focusing instead on short-term profitability.

- Therefore, the EU Commission should introduce swift measures to keep management control over ports in the hand of European companies/stakeholder, a priority to be emphasized in the European port strategy

The US tariffs on key European exports announced in April 2025 highlight the EU's exposure to external economic pressures.

- In this context, the European port strategy must not only target long-term competitiveness and climate goals but also strengthen Europe's economic resilience by reinforcing rail's role in port logistics

This will diversify supply chains, as well as make European exports more cost-efficient and sustainable. Rail-connected ports are essential for shifting trade routes, accessing alternative markets, and ensuring that Europe's industries remain globally competitive in an increasingly fragmented trade environment.

4. Strengthen EU preparedness by enhancing rail's dual-use capacity in European ports

Enhancing the EU's preparedness to deter and address security threats has become a top priority on the political agenda. This requires an upgraded response from the European transport system, which must expand its services beyond civilian purposes.

Railways are a robust and reliable mode of transport for EU's citizens and industries. They are particularly well-suited for defence logistics, including the transport of materials, deployment of new military assets, and movement of existing assets and convoys, especially in times of crisis.

- Emphasize the dual-use capacity of rail infrastructure and transshipment equipment in European ports with a focus on further improvement in the European port strategy

Enhancing rail's dual-use capacity at ports supports the EU's Action Plan on Military Mobility, which calls for transport infrastructure suitable for both civilian and military purposes. Rail is the most suitable land-based system for handling the unique characteristics of military assets, which are often heavy, oversized and hazardous. The large-scale transport of military assets over longer distances within Europe relies on railways. Therefore, prioritizing the development and protection of this critical infrastructure, along with enhancing interconnections and interoperability across transport networks, is essential. Particular attention should be paid to port hinterland developments.

- Include ports in a functional government system

A functional governance system must be established at both EU and Member State levels, in coordination with relevant institutions such as NATO, to ensure regular military and civilian cooperation. This system should involve representatives from the railway sector as well as other critical transport modes, such as port infrastructures and sidings.

5. Ensure funding for rail infrastructure to/in European ports

The European Commission's upcoming proposal for the Multiannual Financial Framework (MFF) 2028-2034 is crucial for port strategy implementation.

- The European port strategy must emphasize funding for rail capacity enhancements in and to European ports to be secured through the MFF, the Connecting Europe Facility (CEF), and national budgets. The rail sector calls for a more ambitious MFF, with the new CEF co-funding at least EUR 100bn.

This funding should prioritize expanding rail capacity within ports and along European Transport Corridors, addressing regional bottlenecks. It should also support the construction of rail-road terminals and the enhancement of access routes to European ports. In addition, it should improve existing terminals, including those serving maritime and inland ports, and transshipment equipment like cranes to increase capacity, including for military assets. To ensure consistency with the reactivity and speed required by military forces, less congested ports and their hinterland should be especially considered in military mobility investments.

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 membership is made up of long-established bodies, new entrants and both private and public enterprises, representing 71% of the rail network length, 76% of the rail freight business and about 92% of 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 competitive and sustainable transport system in Europe. For more information, visit www.cer.be or follow [@CER_railways](https://twitter.com/CER_railways) on X.

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