Europe Containerized Rail Freight Transport Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Maritime, Port & Container Operations (Logistics & Supply Chain)

> **Source:** https://www.mordorintelligence.com/industry-reports/europe-containerized-rail-freight-transport-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 13.41 billion
Projected Forecast (2031)	USD 13.41 billion
Growth Rate (CAGR)	4.81 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in Europe Containerized Rail Freight Transport industry](images/chart_2.png)

![Europe Containerized Rail Freight Transport Market Size](images/chart_3.png)

![Europe Containerized Rail Freight Transport Market Share by Container Size, 2025](images/chart_4.png)

![Europe Containerized Rail Freight Transport Market Share by Shipment Type, 2025](images/chart_5.png)

![Europe Containerized Rail Freight Transport Market Concentration](images/chart_6.png)

![Icon](images/chart_7.png)

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![GPTW](images/chart_18.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period | 2020 - 2031 |
Forecast Data Period | 2026 - 2031 |
Base Year Market Size (2025) | USD 12.76 Billion |
Market Size (2026) | USD 13.41 Billion |
Market Size (2031) | USD 16.96 Billion |

Growth Rate (2026 - 2031)	4.81 %
Market Concentration	Low

Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Europe Containerized Rail Freight Transport Market Analysis by Mordor IntelligenceThe Europe containerized rail freight transport market size was valued at USD 12.76 billion in 2025, and is projected to expand from USD 13.41 billion in 2026 to USD 16.96 billion in 2031, registering a CAGR of 4.81% between 2026 and 2031.

European transport policy continues to favor a larger role for rail in long-distance freight, while investment in terminals is improving access to inland corridors. The most attractive routes in the Europe containerized rail freight transport market combine dependable train paths, port connections, and customers that can commit stable container volumes. Industrial decarbonization requirements are also making rail more relevant to shippers that need documented reductions in transport emissions. Network closures and limited capacity remain constraints, so operators are placing greater value on rerouting options, service frequency, and coordinated terminal and track investment. The European containerized rail freight market, therefore, offers opportunities in high-frequency intermodal services, domestic consolidation, specialized temperature-controlled freight, and coordinated terminal-to-corridor operations across the wider European logistics network.

Key Report Takeaways

* By container size, 40-foot containers held 54.56% of the Europe containerized rail freight transport market share in 2025 and are forecast to grow at a 6.80% CAGR through 2031.
* By container type, general containers accounted for 82.65% of the Europe containerized rail freight transport market size in 2025, while refrigerated containers are forecast to expand at a 7.94% CAGR through 2031.
* By shipment flow, international and cross-border shipments represented 64.56% of the Europe containerized rail freight transport market share in 2025, while domestic shipments are forecast to grow at a 5.71% CAGR through 2031.
* By shipment type, full container load shipments held 85.34% of the Europe containerized rail freight transport market size in 2025, while less-than-container load shipments are forecast to grow at a 6.18% CAGR through 2031.
* By cargo type, manufacturing and automotive cargo held 31.31% share in the Europe containerized rail freight transport market in 2025, while healthcare and pharmaceuticals are forecast to grow at a 7.81% CAGR through 2031.
* By country, Germany held 30.25% share in the Europe containerized rail freight transport market in 2025, while Poland is forecast to grow at a 5.46% CAGR through 2031.

Key Market Trends

Europe Containerized Rail Freight Transport Market Trends and InsightsDrivers Impact Analysis*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
EU Road-To-Rail Modal-Shift Policies	+1.0%	EU-wide, with stronger effects in Germany, France, and Belgium	Long term (≥ 4 years)
Intermodal Terminal And Inland Hub Expansion	+0.8%	Poland, Germany, Belgium, the Netherlands, and France	Medium term (2-4 years)

Industrial Shipper Decarbonization Requirements | +0.7% | Germany, the Netherlands, Belgium, Italy, and Sweden | Medium term (2-4 years) |
Port-To-Inland Container Corridor Growth | +0.6% | The Netherlands, Belgium, Germany, Poland, and the United Kingdom | Medium term (2-4 years) |
Service Reconfiguration During Network Disruptions | +0.4% | Germany, Switzerland, Austria, the Alpine region, and France | Short term (≤ 2 years) |
E-Commerce And Contract Logistics Rail Demand | +0.5% | Germany, Poland, France, and the Nordic countries | Medium term (2-4 years) |
Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The Europe containerized rail freight transport market is fragmented at the national level and across Europe as a whole. DB Cargo AG, OBB Rail Cargo Group, SNCF Group, Rail Logistics Europe, PKP CARGO, and FS Logistix have a broad network scale and established relationships with infrastructure managers. Private specialists such as Hupac, Kombiverkehr, and METRANS compete through service frequency, corridor design, and terminal reach. At the same time, the absence of a single pan-European operator leaves room for regional networks and cross-border partnerships. Competitive outcomes increasingly depend on delivered reliability rather than published capacity, which favors operators that can keep containers moving when a key route faces disruption.

DB Cargo has been adjusting its operating model under restructuring requirements linked to its commercial viability plan. Its 2025 annual report described workforce changes, the sale and leaseback of 6,000 wagons to GATX Rail Europe, and the planned disposal of a minority interest in maritime combined transport. Hupac increased service frequency on selected German-Italian routes during early 2026 to reduce customer exposure to delays, and OBB Rail Cargo Group added services connecting Wels with Hamburg and Bremerhaven, Duisburg with Rotterdam, Salzburg with Offenbach, and Duisburg with Curtici. These moves show that route coverage and service design remain important competitive tools.

CMA CGM completed its acquisition of Freightliner’s UK intermodal rail business in January 2026. The transaction brought 2,000 wagons and 10 terminals into a maritime-to-inland logistics platform. Lineas and FS Logistix formed Modalink to manage the Antwerp Mainhub terminal and associated last-mile services. Opportunities remain in domestic LCL consolidation and pharmaceutical cold-chain rail, where specialized handling can support premium service.

Europe Containerized Rail Freight Transport Industry Leaders* DB Cargo AG

* METRANS a.s.

* Hupac Intermodal SA

* Kombiverkehr GmbH & Co KG

* OBB Rail Cargo Group

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

Europe Containerized Rail Freight Transport Market Report ScopeBy Container Size
20-Foot Containers |
40-Foot Containers |
Other Container Sizes |

Segmentation Accordion Item

By CountryUnited Kingdom |
Germany |
France |
Spain |
Italy |
Belgium |
Netherlands |
Poland |
NORDICS (Denmark, Finland, Iceland, Norway, and Sweden) |
Rest of Europe |

Frequently Asked Questions

What is driving demand for containerized rail freight in Europe?

Policy support for modal shift, terminal investment, port connections, and shipper decarbonization requirements supports demand. However, dependable train paths and coordinated infrastructure work remain essential for converting interest into regular bookings.

How large is Europe's containerized rail freight sector?

The sector is estimated at USD 13.41 billion in 2026 and is forecast to reach USD 16.96 billion by 2031, reflecting a 4.81% CAGR during the 2026-2031 forecast period.

Which container format leads European rail freight?

40-Foot containers led with 54.56% share in 2025 and are projected to grow at a 6.80% CAGR through 2031, supported by maritime compatibility and wider inland-terminal handling capability.

Which container type segment is growing fastest on European rail?

Refrigerated containers are projected to grow at a 7.94% CAGR, reflecting the need for documented handling and dependable temperature-controlled operations.

Why is Poland important for containerized rail freight?

Poland is forecast to grow at a 5.46% CAGR through 2031, supported by terminal investment, broad-gauge connections, and its role between eastern and western European corridors.

What is limiting containerized rail services in Europe?

Network closures, freight competition with passenger traffic, and cross-border technical and administrative friction remain key limitations, while equipment imbalances can increase the cost of returning empty containers and wagons.