



A concurrent series of crises

The last quarter of 2023 brought yet another period of significant negative development in Combined Transport, the fifth quarter of volume losses in a row, albeit at a slower pace compared to the preceding quarters. The business sentiment of CT decision-makers remains “slightly negative”, reflecting the projected weak demand and lacklustre economic output, as well as the major disruptions caused by the closure of the Frejus line and the Gotthard base Tunnel and the ongoing extensive works on the European rail infrastructure network.

2023 has produced a concurrent series of events with a negative outcome for Combined Transport through natural disasters, a major derailment, extensive works throughout the network, which coincided with extreme weather phenomena and strikes. The grim situation was exacerbated by the Ukraine war, the disruption to container shipping in the Red Sea and the weak European economic output and consumer confidence. The upward trend in railway traction costs, fuelled by persistently high traction electricity prices, wage and track access charge increases, made the situation worse.

The long-awaited fourth proposal of the Greening Freight Transport Package - the amendment of the Combined Transport Directive was adopted by the College of Commissioners on 7 November 2023. UIRR published its position paper in December, which generally endorsed the proposal. The sector will propose simplifications to the new definition of “Combined Transport operation” and other technical refinements. More European level benefit rules, like the driving ban exemption for trucks performing CT road legs, will also be recommended.

A study on the impacts of the Commission’s proposed amendment of the Weights and Dimensions Directive was completed on behalf of rail freight and intermodal transport associations in December. The study complements the Commission’s impact assessment, which overlooked several crucial aspects of the proposed gross vehicle weight increase and the proliferation of EMS vehicles. Accordingly, substantial rail freight volume losses could result if the proposal is adopted unchanged.

The confidence of Combined Transport operators and terminal managers remain high in the technical capabilities of their freight transportation services. Investment programmes into rolling stock, terminals and digitalisation have continued unhindered by the poor performance of the past 5 quarters. The intermodal system has empirically proven that it can transport 20% more than it presently does. And the investments in the pipeline, combined with the improvements to the railway infrastructure and the regulatory framework, should create even further capacities.

The sector looks forward to the Track Access Charging and the State Aid guidelines promised by the Commission for the first half of 2024. These should bring added regulatory certainty. The implementation of the amended Eurovignette Directive by Member States should deliver much needed internalisation of the CO2 externality through adjustments to road tolling schemes.

We welcome LTG Cargo as a new member of UIRR, the first from Lithuania.

Ralf-Charley Schultze – President



**Connecting Europe Days
Conference**
- Brussels, Belgium
2-5 April 2024



**International Transport and
Logistics Trade Show**
- Paris, France
19-21 March 2024

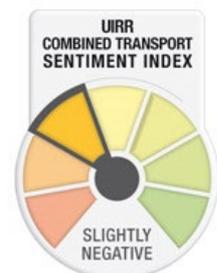
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UIRR Quarterly CT Performance Gauge



Business outlook for the 12 months between 1 January 2024 - 31 December 2024



Performance of Rail Freight

France: Frejus railway closure to last until end of 2024

November 2023

The Region of Savoy is in charge for clearing the rubble that rendered the main railway connection between Italy and France after a landslide in the Maurienne Valley. The restoration works will take until the end of 2024 causing a blockage for rail freight.

Links: <https://www.uirr.com/en/news/mediacentre/2763-frejus-railway-to-remain-closed-at-least-until-the-end-of-2024.html> and <https://www.uirr.com/en/news/mediacentre/2731-frejus-railway-to-remain-closed-until-summer-2024-after-landslide.html>

France: SNCF Fret reorganisation

October 2023

SNCF Fret, following an illegal state aid ruling, must withdraw from providing traction services to third parties. Intermodal rail operators struggle to find solutions on a short notice.

Link: <https://www.uirr.com/en/news/mediacentre/2739-taking-over-fret-sncfs-contracts-is-challenging-for-private-operators.html>

Swiss rail freight performance contracts by 6% in H1.2023

October 2023

Impacted by the Gotthard Base Tunnel derailment and weaker demand, rail freight transport contracted by 6% over the first half of 2023 in Switzerland.

Link: <https://www.uirr.com/en/news/mediacentre/2758-swiss-rail-freight-6-per-cent-in-first-6-months-2023.html>

Italy: missed RFF deadlines cause losses for freight projects

October 2023

Missing deadlines of the EU Recovery and Resilience Facility meant the cutting of €1,5 billion of funding from the modernisation of the Rome-Pescara line, which is frequently used by freight trains.

Link: <https://www.uirr.com/en/news/mediacentre/2745-italy-to-miss-rff-deadlines-more-funds-cut-from-rail-freight-projects.html>

Fair, Mode-neutral Regulatory Framework

Rail and intermodal sector study on WDD impacts on rail freight

January 2024

UIRR and its rail freight peer associations commissioned a study performed by d-fine GmbH of Frankfurt, which makes up for the shortfalls of the European Commission impact assessment related to the amendment of the Weights and Dimensions Directive. Much of the effects uncovered are unwanted, and therefore the Commission's draft proposal should be changed.

Links: <https://www.uirr.com/en/media-centre/leaflet-and-studies/mediacentre/2748-study-on-weights-and-dimensions-d-fine.html> and <https://www.uirr.com/en/media-centre/press-releases-and-position-papers/2024/mediacentre/2747-joint-press-release-weights-and-dimensions-directive-amendment.html>

UIRR: Railway Infrastructure Capacity Regulation position paper

October 2023

UIRR calls for more and better-quality train paths for freight trains also supporting the need for socio-economic and environmental cost-benefit analysis and a minimum train length to be established.

Link: <https://www.uirr.com/en/media-centre/press-releases-and-position-papers/2023/mediacentre/2692-press-release-rail-infrastructure-capacity-regulation.html>

Spain resists road toll changes under the new Eurovignette Directive

September 2023

The Spanish government struck a deal with the European Commission whereby its Eurovignette Directive inspired tolling reform will be discarded and replaced with measures promoting rail freight instead.

Link: <https://www.uirr.com/en/news/mediacentre/2729-spain-resist-implementation-of-recent-eurovignette-amendment.html>

Austria implements CO₂-inspired road toll changes

October 2023

Austria as well as Hungary, announced the updating of its road tolling scheme to reflect the CO₂ emissions class of vehicles as prescribed in the new Eurovignette Directive.

Link: <https://www.uirr.com/en/news/mediacentre/2740-2024-01-03-15-03-51.html>

eFTI₄EU Project supports implementation of the eFTI Regulation

December 2023

The EU-funded multi-year project eFTI₄EU has been launched with a nearly €30 million budget to support the implementation of the eFTI Regulation (Reg. 1056/2020). UIRR will follow the project and ensure that intermodal aspects are pursued.

Links: <https://efti4eu.eu/> and <https://efti4eu.eu/news/efti4eu-project-new-general-presentation/>

Netherlands: RID risk assessment causes damage to rail freight

December 2023

Misguided Dutch law causes reverse modal shift for dangerous goods (RID) consignments from freight trains back to trucks.

[Link: https://www.uirr.com/en/news/mediacentre/2778-damaging-impact-of-dutch-dangerous-goods-risk-assessment.html](https://www.uirr.com/en/news/mediacentre/2778-damaging-impact-of-dutch-dangerous-goods-risk-assessment.html)

Enhancement of Intermodal Transport

Malaszewicze transshipment volumes down by 24,3% and 91%

October 2023

Intermodal transshipments in the main EU gateway for intercontinental intermodal rail, Malaszewicze in eastern Poland, shrunk by 24,3% (westbound) and 91% (eastbound) during H1.2023.

[Link: https://www.uirr.com/en/news/mediacentre/2735-malaszewicze-volumes-continue-sharp-downward-trajectory.html](https://www.uirr.com/en/news/mediacentre/2735-malaszewicze-volumes-continue-sharp-downward-trajectory.html)

Combined Transport road-legs should be made toll-free

October 2023

Transport ministers of federal states of Germany called for the exemption of trucks performing combined transport road-legs from paying road tolls.

[Link: https://www.uirr.com/en/news/mediacentre/2741-2024-01-03-15-06-26.html](https://www.uirr.com/en/news/mediacentre/2741-2024-01-03-15-06-26.html)

France: road-rail combined transport declines in H1.2023

November 2023

A 22% decline of road-rail combined transport performance has been reported by GNTC, the French association for intermodal transport, in H1.2023.

[Link: https://www.uirr.com/en/news/mediacentre/2761-sharp-decline-in-french-intermodal-freight-in-first-half-of-2023.html](https://www.uirr.com/en/news/mediacentre/2761-sharp-decline-in-french-intermodal-freight-in-first-half-of-2023.html)

Combined Transport Directive proposal published

November 2023

The European Commission proposal to revise the Combined Transport Directive has been announced by Transport Commissioner Adina Valean at the UIRR-CT₄EU CT Exhibition in the European Parliament.

[Links: https://www.uirr.com/en/news/mediacentre/2766-european-commission-adopts-new-proposal-on-intermodal-transport-.html](https://www.uirr.com/en/news/mediacentre/2766-european-commission-adopts-new-proposal-on-intermodal-transport-.html)
and <https://www.uirr.com/en/media-centre/press-releases-and-position-papers/2023/mediacentre/2694-press-release-uirr-welcomes-the-ctd-amendment.html>

UIRR: Combined Transport Directive position paper

December 2023

UIRR published its position paper supporting the Commission's proposed amendment of the CT Directive with preconditions. More European-level framework rules, such as exempting combined transport road legs from holiday and weekend drive bans, would be most welcome by the sector. Maintaining the equivalence clause with Combined Transport's unimodal road alternative, enshrined in Article 4, should remain an essential component of the Directive. A separate, second position paper will be produced on the definition.

[Links: https://www.uirr.com/en/media-centre/press-releases-and-position-papers/2023/mediacentre/2710-press-release-ctd-amendment-modernisation-with-preconditions.html](https://www.uirr.com/en/media-centre/press-releases-and-position-papers/2023/mediacentre/2710-press-release-ctd-amendment-modernisation-with-preconditions.html)
and <https://www.uirr.com/en/media-centre/press-releases-and-position-papers/2023/mediacentre/2709-position-paper-ct-directive-a-necessary-modernisation-with-preconditions.html>

New intermodal terminals in Lodz and Oradea

November 2023

A new intermodal terminal was opened in Lodz, Poland (PKP Cargo) while a tender for the operation of the new terminal in Oradea, Western Romania (Episcopia Bihor Intermodal Center) has been announced by ADLO, the local development agency.

[Links: https://www.uirr.com/en/news/mediacentre/2772-new-terminal-in-odz-officially-open.html](https://www.uirr.com/en/news/mediacentre/2772-new-terminal-in-odz-officially-open.html)
and <https://www.uirr.com/en/news/mediacentre/2775-new-intermodal-terminal-in-oradea-western-romania-.html>

Intermodal trains to carry trailers from Kiev to Klaipeda

November 2023

An intermodal rail service to carry trailers in a continental Combined Transport operation from Kiev, Ukraine, to Klaipeda, Lithuania, has been launched.

[Link: https://www.uirr.com/en/news/mediacentre/2773-trailer-transport-between-kiev-and-klaipeda.html](https://www.uirr.com/en/news/mediacentre/2773-trailer-transport-between-kiev-and-klaipeda.html)

Amazon.com to decarbonise through intermodal in Europe

December 2023

E-commerce giant, Amazon increased its use of intermodal freight transportation by 50% in 2023. Amazon will continue to pursue this strategy to achieve its decarbonisation objectives.

[Link: https://www.uirr.com/en/news/mediacentre/2777-amazon-scales-up-intermodal-game-in-europe.html](https://www.uirr.com/en/news/mediacentre/2777-amazon-scales-up-intermodal-game-in-europe.html)

Personnel News

CFL TERMINALS

January 2024



Laurent Erhard has been appointed CEO of CFL Terminals as of 1 January. Laurent Erhard has been the CEO of CFL logistics, a subsidiary of CFL Multimodal, for the past 6 years.

Daniel Feyder, previous CEO of CFL Terminals, remains the CEO of CFL site services with its recent addition of a Secured Truck Stop open to all Eurohub South clients.

VIIA, NAVILAND CARGO

April 2024



Bénédicte Colin will join the Executive Committee of Rail Logistics Europe in her capacity as Executive Chairperson of VIIA and Naviland Cargo. Prior to her appointment, Bénédicte Colin worked at various law firms in France, and the SUEZ Environment Group. In 2014 she joined the Keolis Group.

Charles Puech d'Alissac, previous Chairman of VIIA and Naviland Cargo, has been appointed the Director General of FRET SNCF.

RAIL CARGO GROUP

December 2023



Robert Galbavy has been named Business Unit Manager Intermodal as of 5 December 2023. He has over 40 years of professional experience in logistics and transportation. He completed his training at Panalpina in Vienna, followed by a move to LKW WALTER and then to Cargo-Partner. At Cargo-Partner, he spent 8 years developing the Group together with the owner on the Management Board. In this role, he helped to build up companies in CEE and North America, helped to design supply chain models, developed customized solutions for various vertical industries and looked after customers in Europe, North America, Asia and Australia.

Members' News

AMBROGIO INTERMODAL

January 2024

Investment into 650 new 45-foot intermodal loading units

Click: <https://ambrogiointermodal.com/news/ambrogio-intermodal-rafforza-il-suo-impegno-verde-con-linvestimento-nella-gamma-intermodale-kassbohrer/>

BALTIC RAIL

January 2024

The volumes handled by Baltic Rail in 2023 remained stable

Click: <https://www.balticrail.com/volume-handled-by-baltic-rail/>

DRY PORT TERMINAS

December 2023

Starting 11 December 2023, DPT is open for the handling and storage of ADR/RID containers

Click: <https://www.uirr.com/en/news/mediacentre/2799-starting-december-11-2023-dpt>

HUPAC

February 2024

2023 annual results

Click: <https://www.hupac.com/EN/Challenging-framework-conditions-for-combined-transport-cea89d00>

LAHAYE

January 2024

2023 annual results

Click: <https://www.lahaye-global-logistics.com/actualites/bilan-du-report-modal-2023/>

METRANS

August 2023

E-truck strategy for combined transport road legs achieves next stage

Click: https://www.linkedin.com/posts/mettrans-as_mettrans-mercedesbenztrucks-slovakia-activity-7160182563888627712-Jtas

RALPIN

September 2023

12% more traffic handled in the first 9 months of the year

Click: <https://www.ralpin.ch/sites/default/files/2023-10/2023%2010%2030%20RALpin%20Medienmitteilung%20Q3%202023%20und%20Erg%20C3%A4nzung%20VR.pdf>

SAMSKIP

January 2024

IT systems to drive process optimisation

Click: <https://www.samskip.com/news/uniformed-it-systems-to-drive-standardization-and-scalability-for-more-harmonized-operational-processes/>

Key Dates & Events

20 February, online	ESEP4FREIGHT Webinar on document management and blockchain in intermodal
12-14 March, Verona	LetExpo 2024
13 March, Budapest	The priorities of rail freight in 2024 – a HUNGRAIL Conference
19-21 March, Paris	SITL 2024
2-5 April, Brussels	Connecting Europe Days Conference
15 - 17 April, Warsaw	RailFreight Summit
16 May, Brussels	UIRR General Assembly
22-24 May, Leipzig	ITF Summit 2024 on Greening Transport
30-31 May, Rotterdam	Europe-Asia Intermodal Logistics Forum 2024
11-13 June, Birmingham	Multimodal 2024



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