



INTERNATIONAL UNION  
FOR ROAD-RAIL  
COMBINED TRANSPORT

IRU Group of experts on intermodal transport and logistics

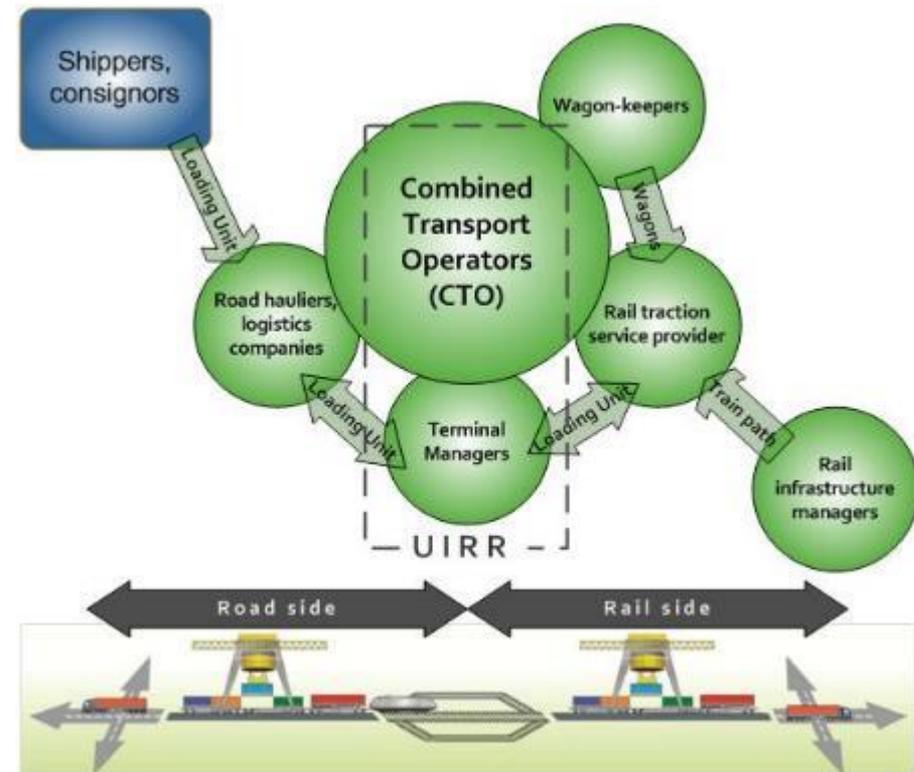
# CURRENT TRENDS & DEVELOPMENTS IN COMBINED TRANSPORT



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Technical Director

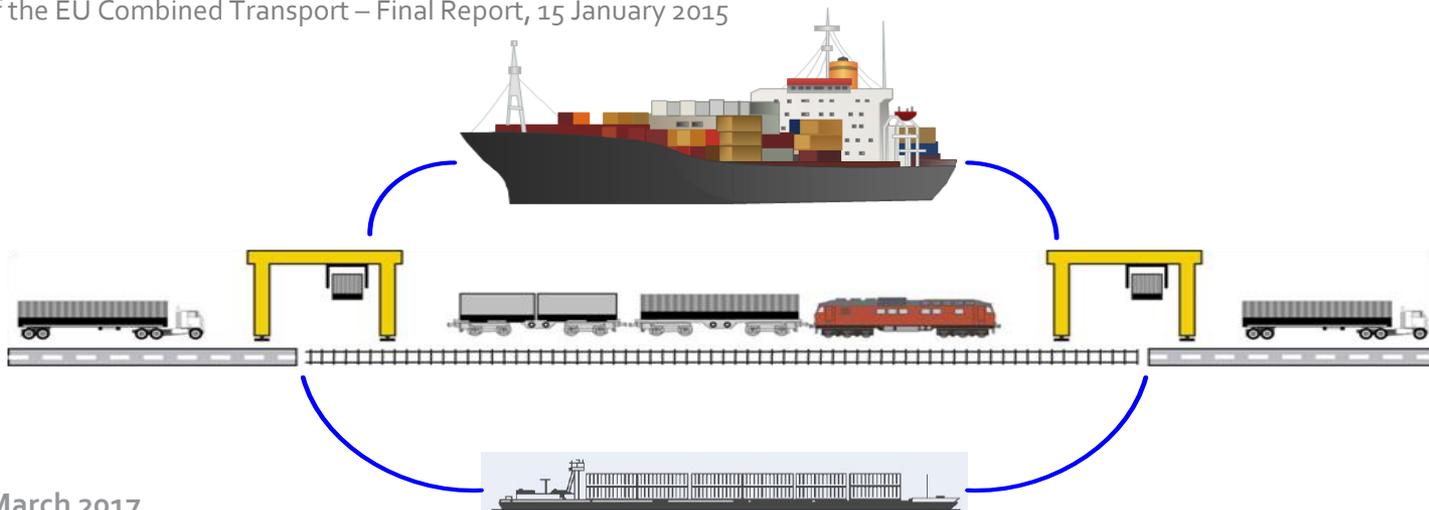


- **Members:** Combined Transport Operators and Terminal Managers, who enable the efficient insertion of rail into transport-chains
- **Logistics companies, road hauliers:** customers as well as shareholders of UIRR Members
- **Performance:** UIRR Members handled about 50% of European Combined Transport in 2014
- **Interest:** fair regulatory conditions in transport to enable *competition on the basis of technical merit and competence/management excellence*
- **UIRR:** founded in 1970  
- seat in Brussels since 1988



CT market segment	Transport volume		Tonnes lifted (gross tonnes)	Tonnes moved (bn tonne-km)	
	(TEU)	(units)		Only non-road legs <sup>a</sup>	Road and non-road legs
Intra-MS	4.843.100	3.229.000	41.589.800	20	23
Intra-EU	8.687.200	5.791.000	86.198.000	66	76
International	14.339.500	9.560.000	143.026.700	67	77
<b>Total CT</b>	<b>27.869.800</b>	<b>18.580.000</b>	<b>270.814.500</b>	<b>153</b>	<b>175</b>
<i>Total excluding CT short sea/road</i>	<i>22.358.800</i>	<i>14.906.000</i>	<i>233.629.500</i>	<i>126</i>	<i>144</i>

Source: Analysis of the EU Combined Transport – Final Report, 15 January 2015



# European Road-Rail Combined Transport (2011)

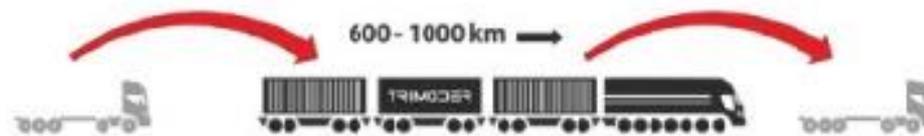


4

CT market segment	Transport volume (TEU)	Tonnes lifted (gross tonnes)	Tonnes moved *) (bn tonne-km)
Intra-MS	3.218.110	33.260.800	17
Intra-EU	4.856.170	60.355.980	51
International	9.133.520	92.141.720	47
<b>Total</b>	<b>17.207.800</b>	<b>185.758.500</b>	<b>115</b>

CT market segment	Ø load factor (tonnes/TEU)	Ø rail distance (km)	Ø transport performance (tonne-km/TEU)
Intra-MS	10,3	514	5.314
Intra-EU	12,4	850	10.564
International	10,1	509	5.135
<b>Total</b>	<b>10,8</b>	<b>621</b>	<b>6.700</b>

Source: Analysis of the EU Combined Transport – Final Report, 15 January 2015





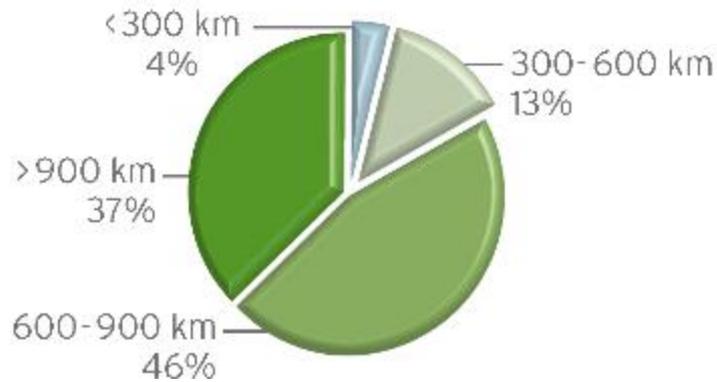
	Border Crossing			Domestic			Total		
	2014	2015	2015/2014	2014	2015	2015/2014	2014	2015	2015/2014
Number of consignments	1,833,011	1,902,330	3.78%	986,596	938,430	-4.88%	2,819,606	2,840,760	0.75%
containers	1,385,149	1,444,232	4.27%	917,683	868,705	-5.34%	2,302,831	2,312,937	0.44%
(craneable) semi-trailers	304,270	322,486	5.99%	58,384	59,764	2.36%	362,654	382,250	5.40%
complete trucks (RoLa)	143,592	135,612	-5.56%	10,529	9,961	-5.39%	154,121	145,573	-5.55%
Average distance	1,005	1,036	3.03%	507	505	-0.38%	851	882	3.60%
Billion tkm	42.58	45.80	7.55%	9.59	9.10	-5.07%	52.17	54.90	5.23%
Number of TEU	3,666,021	3,804,660	3.78%	1,973,192	1,876,859	-4.88%	5,639,213	5,681,519	0.75%

## Main trends

- **Cross border traffic: increase**
- **Domestic traffic: stagnation**
- **Loading unit: increase of semi-trailers – stagnation containers – decrease complete trucks**
- **Performance: TKM increase – extension of network to East**

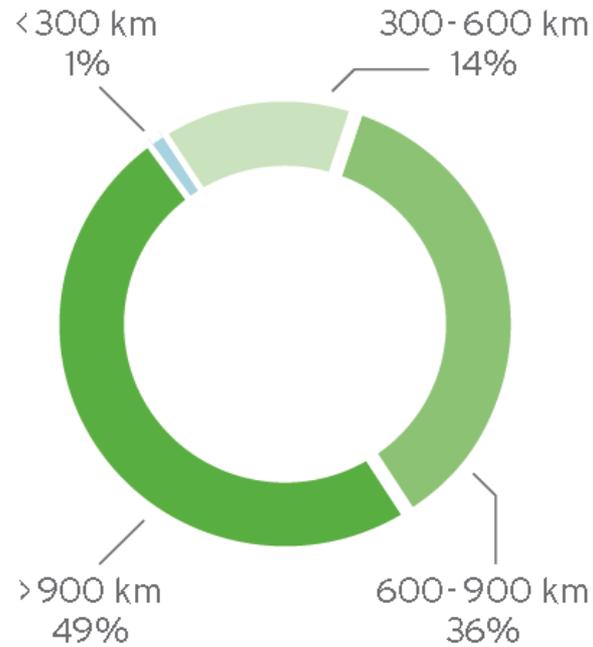


## Distance matrix



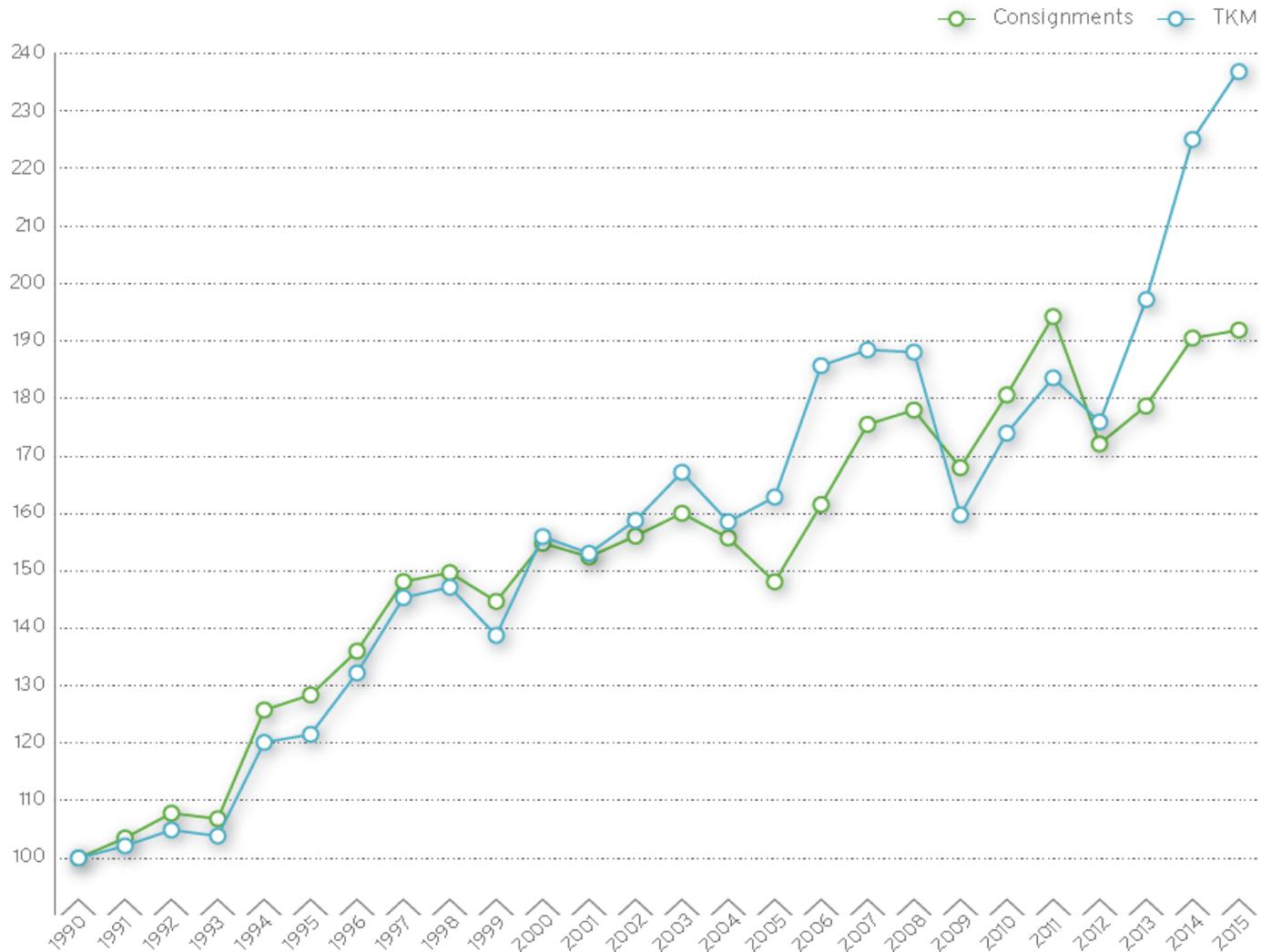
2012

## Distance matrix



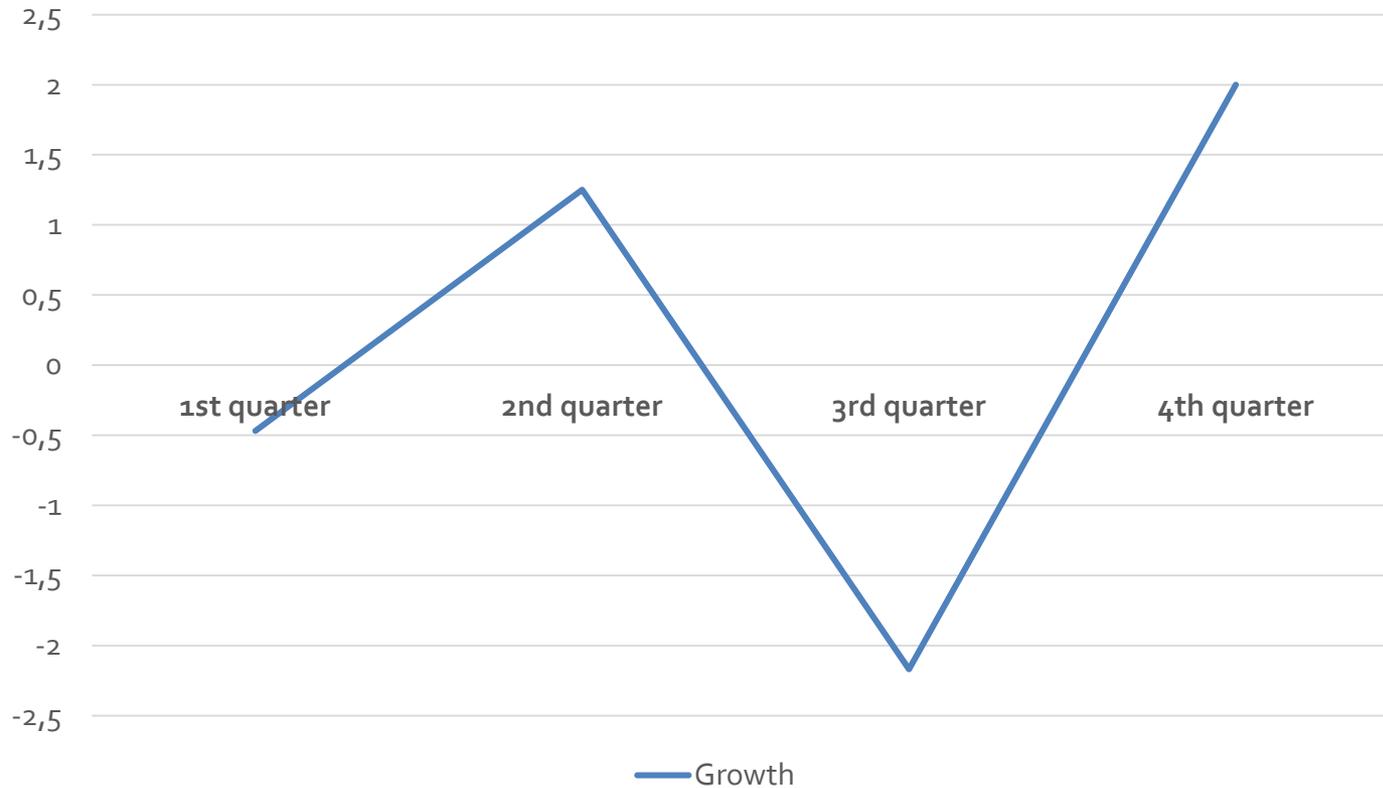
2015

# UIRR CT Growth Index - 1990 – 2015





### UIRR Quarterly CT Performance Index 2016 (in %)



#### Influencing parameters

- Oil prices
- GDP growth
- Infrastructure works / accidents / incidents
- Quality of services / business models
- Accidents



- **Technical pillar:** enables internal productivity gains

Highlights: - Systematic weeding of “national rules” (by ERA)

- European vehicle passport
- ERTMS strategy
- Extended ERA: Register of Infrastructure, national rules database
- Single European Safety Certificate

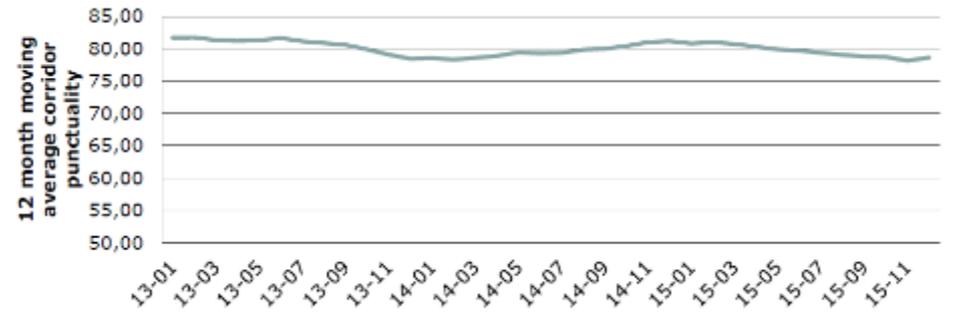
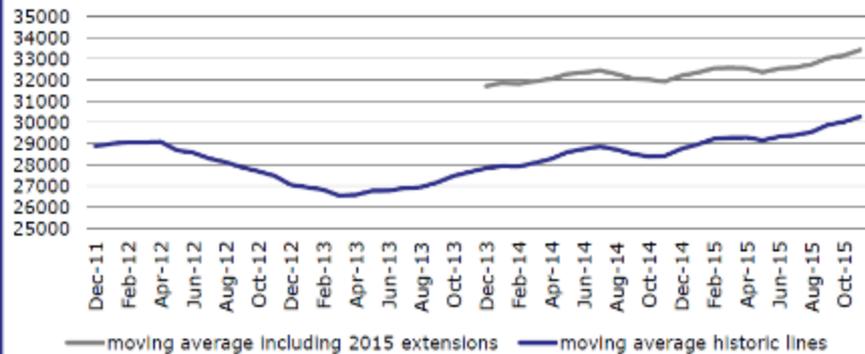
- **Political pillar:** weakens the hold of incumbents in traction service market



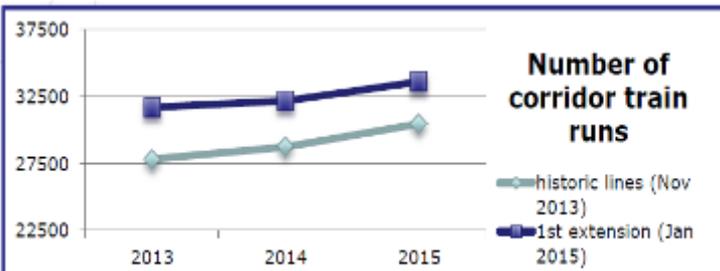
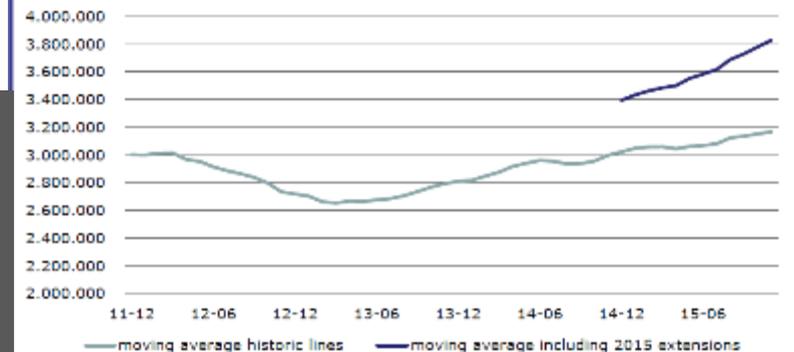
**Regulation 913/2010:** designed to address problems of European rail freight

- **All 9 corridors up and running:** the last 3 started only 10 months ago
- **Somewhat bureaucratic approach:** slow progress – RAG/TAG and COM coordination initiatives promise impetus and improved transparency
- **Positives:** more traffic – more monitoring – more transparency

**12-month moving average (Total Corridor Traffic)**



**12 month moving average Ton-Km**



**MORE PATIENCE NEEDED**



*within the imminent recast of Directive 92/106*

- **Framework legislation**

- definitions and Pan-European rules for technical aspects such as codification, certification, identification, registration, Terminals, and technical annexes (to serve as standardisation mandates)

- **Temporary compensatory measures**

- to transparently counterbalance the regulatory disadvantage for as long as it continues to prevail (proportionately – based on an assessment of disparities – to reflect the status quo in each Member State)

- **Optimised infrastructure**

- complementing the large projects with small scale development aid on a Member State level to eliminate infrastructure limitations faced by consignors if wishing to shift to intermodal/combined transport

*Continued...*



*within the imminent recast of Directive 92/106*

- **Member State-level intermodal development plans**
  - encouraging the complex horizontal thinking required by intermodal/combined transport based logistics on a Member State level
- **Intermodality tests**
  - systematic test of any policy or regulatory proposal - as part of the impact assessment - to check whether an intermodal/combined transport solution could not deliver the desired policy aim more efficiently (like the SME or cost of regulation tests already in use)
- **Monitoring and reporting**
  - accurate measurement of intermodal/combined transport performance and regular feed-back to market actors, stakeholders and decision-makers

**PLEASE SUPPORT THE INTERMODAL SECTOR'S NEEDS!**



## Directive on Weights & Dimensions 719/2015 - Implementation

- **44t rule:** standard (cranebale) semi-trailer should be included – 44-tonne gross vehicle weight exemption for the first/last mile road haulage of CT (any combinations for articulated vehicles or road trains – most widely-used combination two-axle motor vehicle with three-axle semi-trailer = 42 tonnes)
- **aerodynamic devices:** clarification on the necessity to be fully compatible with intermodal transport - the 200mm specifications shall be applied to all types of semi-trailers + accompanied measures + studies needed to assess the technical compatibility semi-trailer + devices with wagons
- **longer trucks:** concept such as 14,92m long semi-trailer is not necessarily fully compatible with all railway wagons (standard trailer: partially – mega-trailer version not at all) – the 25.25 metre-long vehicles = very limited use in Combined Transport
- **intermodal definition:** not the right place – semi-trailer not listed at all - full support for a revision of 92/106



**NEED ACCURATE DATA ON TERMINALS**

## Insufficient information on European rail freight transshipment facilities / last-mile infrastructure!!!

EU Study MOVE/B2/827-2013  
01/2015-03/2016

Resolving difficulties to access information on last mile infrastructure for rail freight

Development and programming of a EU-wide web-based information portal with GIS functionalities  
(Demonstrator)

Recommendations to manage the portal on permanent basis

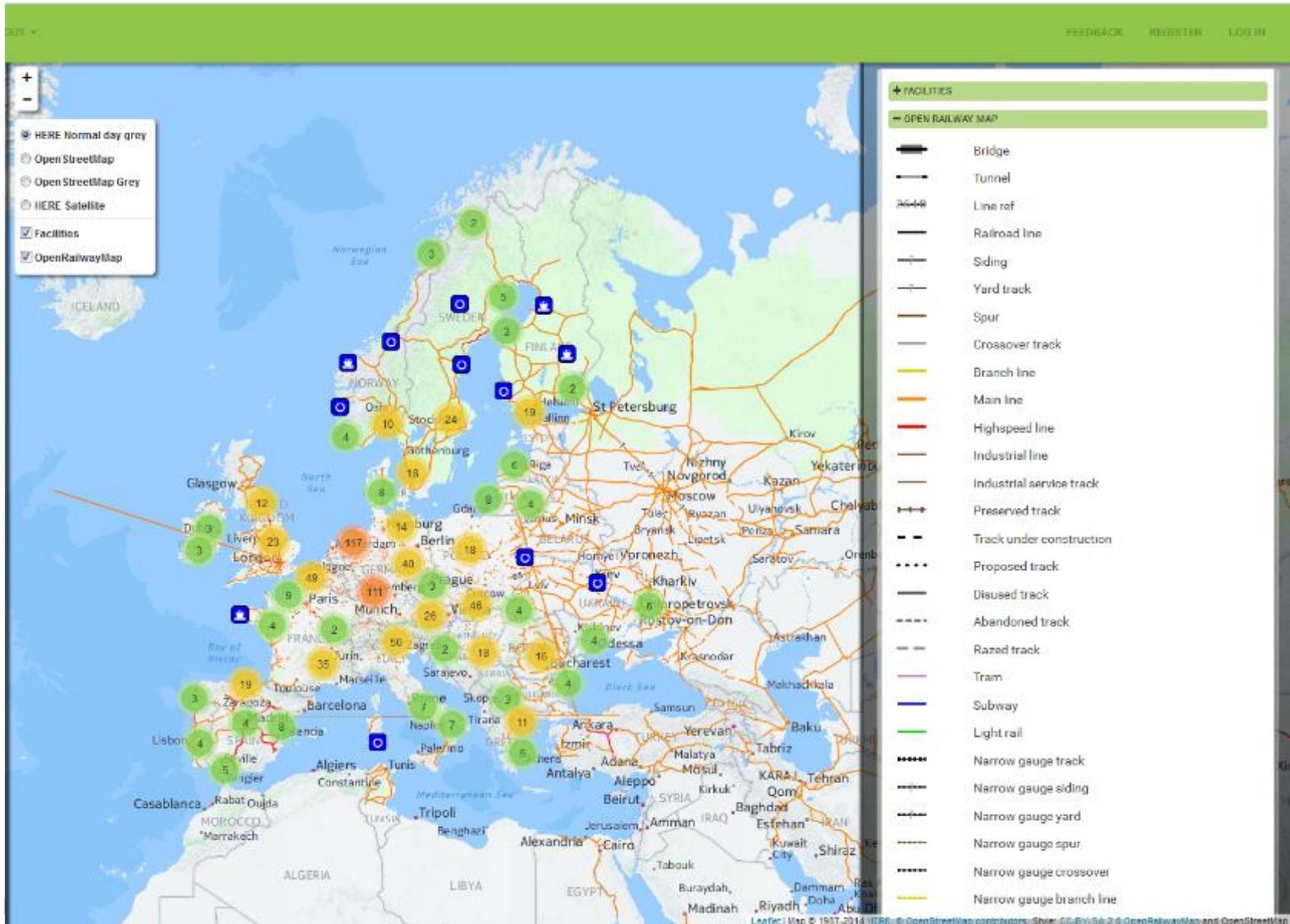
# LAST MILE STUDY – IDENTIFICATION OF TYPES OF FACILITIES



	Private sidings	Stations with public sidings	Intermodal terminals	Railports / Rail logistic centres
Number of sites in Europe (EU 28+2) <b>Total: ca. 22,120</b>	ca. 15,600	ca. 5,600	ca. 730	ca. 190
Trend for future development	↘	↓	↗	↑
Main rail freight markets	Single wagons / wagon groups Block trains	Single wagons / wagon groups	Intermodal trains	Single wagons / wagon groups
Access for rail freight customers	Mostly not	Yes	Mostly yes	Yes
Restriction for commodities	Depending on owner	Generally no restrictions, only few dedicated commodities (e.g. wood)	Standardised loading units only	Generally no restrictions, affinity to dedicated commodities (e.g. steel, paper)

**Additionally:** Areas with several freight access points, e.g. **Freight villages**, **Inland ports** or **Seaports** with rail connection.

# LAST MILE STUDY: WWW.RAILFREIGHTLOCATIONS.EU



# RAILFREIGHTLOCATIONS.EU (SCREENSHOTS)



[HOME](#) [SETTINGS](#) [ABOUT](#) [FEEDBACK](#) [REGISTER](#) [LOGIN](#)

Search facility here

**FACILITY TYPE** ALL NONE

Intermodal terminal

Railport / Rail logistics centre

Station with public siding

Private siding

Other

LESS FILTERS

**AREA TYPE** ALL NONE

Sea port

Inland port

Freight village

Other

**MODE** ALL NONE

Rail

Road

Sea freight

Inland waterways

Other

**RAIL FREIGHT CORRIDOR** ALL NONE

RFC1

RFC2

RFC3

RFC4

RFC5

RFC6

RFC7

RFC8

RFC9

LOADING UNIT

CARGO TYPE

SERVICE

Search here

**FACILITY PROFILE**

How to show a facility for details

**FACILITIES**

Name [Operator]
Antwerp Combinant [Combinant NV]
Antwerp Grindijk [FRE]
Antwerp Comenorg [FRE]
APM Terminal Zedbrugge [APM Terminal Zedbrugge NV]
APM Terminal Rotterdam [APM Terminal Rotterdam]
AFC (Associated Terminal Operators) [AFC Antwerp]
Container Handling Zedbrugge (CHZ) [PSA Zedbrugge]
Contargo Karlsruhe Rheinfelden [Contargo Worts-Karlsruhe GmbH]
Contargo Ludwigshafen Rhein-Neckar [Contargo Rhein-Neckar GmbH]
Contargo Nexus T1 [Contargo Nexus GmbH]

Showing 1 to 10 of 76 entries

[PREVIOUS](#) [NEXT](#)

**LEGEND**

Facility type colours

- Intermodal terminal
- Railport / Rail logistics centre
- Station with public siding
- Private siding
- Other

Area type symbols

- S Sea port
- I Inland port
- V Freight village

[OPEN RAILWAY MAP](#)

# RAILFREIGHTLOCATIONS.EU (SCREENSHOTS)



**RAILFREIGHTLOCATIONS.EU** HOME SETTINGS ABOUT + FEEDBACK REGISTER LOGIN

Search facilities

**FACILITY TYPE**  ALL NONE

- Intermodal terminal
- Railport / Rail logistics centre
- Station with public siding
- Private siding
- Other

LESS FILTERS

**AREA TYPE**

**MODE**  ALL NONE

- Trail
- Road
- Sea freight
- Inland waterways
- Other

RAIL TRANSPORT MODALITY

LOADING UNIT

CARGO TYPE

SERVICE

Search map

**FACILITY PREVIEW**

Hover above a facility for details.

**FACILITIES**

**Name [Operator]**

- 8th Harbour Dock NIS (Kaal 332 - 344) (NIS Nova & Heesac Noord Natis Sluiscoring N.V.)
- ABES Terminal (A.B.E.S. nv)
- Ancon (Ancon nv)
- Antwerp Combinant (Combinant NV)
- Antwerp Deurne Dock Terminal (PSA Antwerp)
- Antwerp Euroterminal NV (ACT NV)
- Antwerp Gateway Terminal (DP World NV)
- Antwerp Circle Dock (CIS)
- Antwerp Zeehaven 3 (S)
- ATD (Associated Terminal Operators) (ATD Antwerp)

Showing 1 to 10 of 26 entries (Filtered from 823 total entries)

PREVIOUS NEXT

**LEGEND**

**FACILITIES**

- Facility type colour
- Intermodal terminal
- Railport / Rail logistics centre
- Station with public siding
- Private siding
- Other

**Area type symbols**

- Sea port
- Inland port
- Freight village

OPEN RAILWAY MAP

# RAILFREIGHTLOCATIONS.EU (SCREENSHOTS)



**RAILFREIGHTLOCATIONS.EU** HOME TO FILTERS ABOUT HELP

Search facilities

**FACILITY TYPE**  ALL NONE

- Intermodal terminal
- Railport / Rail logistics centre
- Station with public siding
- Private siding
- Other

LESS FILTERS

**AREA TYPE**

**MODE**  ALL NONE

- Rail
- Road
- Sea freight
- Inland waterways
- Other

**RAIL FREIGHT MODES**

**LOADING UNIT**

**CARDO TYPE**

**SERVICE**

Search map

**FACILITY PREVIEW**

Hover above a facility for details.

**FACILITY LIST**

Name [Operator]
Sti Harbour Dock HNS (Kant 332 - 344) (HNS Nova & Haza Noord Nuts Stevedoring b.v.)
ABES Terminal (A.B.E.S n.v.)
Ancon (Ancon n.v.)
Antwerp Container (Container NV)
Antwerp Dongarak Terminal (ISA Antwerp)
Antwerp Euroterminal NV (AET NV)
Antwerp Gateway Terminal (DR World NV)
Antwerp Circle (c) (FB)
Antwerp Zeebrugge (FB)
A. O. (Associated Terminal Operators) (ATO Antwerp)

Showing 1 to 10 of 26 entries (Filtered from 625 total entries)

Previous Next

**LEGEND**

**RAILWAY MAP**

- Bridge
- Tunnel
- Line ref
- Redlined line
- Siding
- Yard track
- Spur
- Crossover track
- Branch line
- Main line
- Highspeed line

# RAILFREIGHTLOCATIONS.EU (SCREENSHOTS)



**RAILFREIGHTLOCATIONS.EU**

**Europe Terminal**

**BASIC DATA** | INFRASTRUCTURE/EQUIPMENT | LOADING UNITS/CARGO TYPES | SERVICES | LINKS

**Facility type:**  
 Intermodal terminal  
 No information available

**Facility address:**  
 Scheldelaan 601  
 2040 Antwerp  
 Belgium

**Facility contact data:**  
 PSA Antwerp  
 Ofster Vermaepen  
 T +32 3 260 12 37  
 oir@psa.be | psainfo@psa.be | website.be  
 Website: LF

**Opening status:**  
 No information available

**Notes:**  
 Inland waterways, Rail, Road, Sea freight  
 Facility located in inland port, Sea port  
 Operator status: Unknown

**Map:** Aerial view of the facility with a location pin. Includes a zoom control and a small inset map of Europe.

**Map Legend:**

- Bridge
- Tunnel
- Line ref.
- Railroad line
- Siding
- Yard track
- Spur
- Crossover track
- Branch line
- Main line
- Highspeed line

**Facilities:**

- Antwerpen - Meirte Blok 1-2
- Antwerpen - Meirte Blok 3
- Antwerpen - Meirte Blok 4
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INTERNATIONAL UNION  
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# THANK YOU

For your attention

