



UIRR Report

EUROPEAN ROAD-RAIL COMBINED TRANSPORT

2018-19

The mission of UIRR, as an industry association, is to

grow the pie for Combined Transport through enabling fair competition based on technical merit and management excellence

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IMPRESSUM

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Key Figures of Combined Transport



The figure is a 2.2 million TEU increase from a year earlier, which consists of 1.76 million TEUs from new members and one-off acquisitions by existing members, as well as 440 000 TEUs of organic growth of the total UIRR membership over the course of 2018.

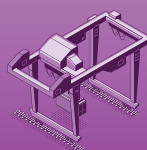
8,6 million TEUs

-30
kilometers

The 871 km average non-road distance covered by an intermodal consignment carried by a UIRR member in 2017 has been reduced by 30 kilometres to 841 km this past year, which is an important reflection of the encouraging trend that Combined Transport is becoming the choice of shippers over shorter distances too.

Transshipment terminals are the '*passenger stations of freight*', the locations where cargo arriving in intermodal loading units is loaded onto freight wagons so as to travel in a freight train over the longer part of its journey. Adequate terminal density and the availability of sufficient capacities at these terminals are crucial from the perspective of growing Combined Transport. It is most welcome to see numerous new terminal extension and construction projects ongoing throughout Europe.

75



**the number of
major capacity
extension projects
and new terminals
under construction
in Europe**

2018 : decisive growth though some of it is due to corporate consolidation

The past year was concluded with a decisive +4.97% growth in terms of number of consignments forwarded by UIRR member Combined Transport Operators. This growth, however, only reflected a +0.78% expansion in terms of tonne-kilometres as the average consignment covered a shorter distance by rail than a year before. This result comprises robust development of unaccompanied Combined Transport - domestic +4.3%, border-crossing +5.3% - coupled with a 7.4% decline in the transport of complete trucks also known as Rolling Motorway or Accompanied Combined Transport. The sector welcomes the reduction of the average non-road distance per consignment, which is a reflection of improving competitiveness.

Operations in 2018 were severely disrupted by the prolonged railway strikes in France and the continued extensive maintenance and development works along the network - adversely affecting quality performance throughout, and in particular within Germany. The efforts of infrastructure managers to better coordinate the scheduling of works will have to be considerably improved, taking into account not only the needs of passenger services but freight operators as well. This must also include the quality and quantity of train paths provided as well as the traffic management priorities applied along the network.

The State of Affairs

FROM THE PRESIDENT

European Road-Rail Combined Transport (CT) closed a decisive year as the transport performance of UIRR Member CT Operators grew by +4.97% in terms of consignments and +0.78% when expressed in tonne-kilometres. The development of UIRR, the industry association of the sector, has been boosted not only thanks to the accession of three new members but also due to the one-off corporate consolidation transactions. Accordingly, UIRR member CT Operators carried a historic high of nearly 8.6 million TEUs in 2018.

CT performance and Developments to the Regulatory Framework

2018 has been an important year in the history of the European Combined Transport sector and UIRR, despite a significant drop of rail freight quality performance attributable to French railway strikes and excessive works on the network:

- one of the Continent's largest Combined Transport Operators - Metrans of Czechia - became a member, alongside VIJA of France and terminal manager WienCont of Austria;
- two major acquisitions - ERS Railways by Hupac and Greenmodal by Novatrans - brought additional transport volumes;
- decisive organic growth has been realised across-the-board by the association's membership.

In 2018, several European Rail Freight Corridors began delivering monthly quality performance reports of a statistically representative number of trains. The figures show a decline in the punctuality and reliability of freight trains translating to a declining performance throughout the network, which corresponds to the observations of UIRR members.

Declining rail freight quality initially means extra costs for the entire intermodal transport chain, as expensive buffer capacities need to be built into the system to counterbalance the poor performance. The rethinking of business models may also deliver improvements. After exhausting these possibilities, the customer may still be confronted with a lower than expected level of reliability. This sometimes results in the difficult-to-reverse decision to abandon intermodal transport and return to end-to-end trucking instead.

Both rail infrastructure managers and rail freight traction service providers must enhance their processes to collectively offer a competitive service enabling good asset utilisation,

while offering attractive transit times and a reliable punctuality performance.

Over the past year, the European regulatory scene relevant to intermodal transport was dominated by the Mobility Packages of the European Commission and the amendment of the Combined Transport Directive. The European legislator has set out to reform the framework legislation for the dominating mode of land transport: trucking. Combined Transport is affected both through the potential effects this will have on first and last mile road haulage - an important component of an intermodal transport chain - as well as through the changes to transport prices that may increase as a consequence.

UIRR has contributed to the legislative process by offering expert insight into the effect of possible changes to the law - with a view to achieve the aims of transport politicians regarding decarbonization and the reduction of pollution, congestion and accident. Modal shift needs to occur - towards energy efficient, low pollution and safe rail freight - in order to reduce the unsustainably high market share of long-distance trucking.

The progressive amendment of the Combined Transport Directive needs to deliver less debatable definitions, enhanced enforcement, improved accountability through regular reporting and increased transparency. Ultimately, the legislation should provide for temporary compensatory measures to counterbalance the regulatory framework that onesidedly favours road. These measures should exist for as long as it takes to correct the imbalances.

2018 regrettably ended without a decisive breakthrough on neither of the important legislations. It will be left to the new European Parliament, to be elected at the end of May 2019, to find the common ground together with the Member States as regards to the fair and effective contents of the needed regulatory realignments.

UIRR member Combined Transport Operators carried a historic high of 8,6 million TEUs in 2018.



Ralf-Charley Schultze, President

Achievements of 2018

UIRR focuses its efforts on three areas, where the following progress has been recorded over the year:

- **Boosting the quality performance of rail freight:** while quality-related transparency has improved, effective quality enhancement measures have yet to be implemented.
- **Achieving a fair, mode-neutral regulatory environment:** several Member States have adopted track access charge reduction schemes to bridge the gap between what trucks and trains pay for the use of the infrastructure. A proposal for an electronic freight transport document, promising to reduce the administrative burden of transport, has also been tabled by the European Commission.
- **Continuously enhancing intermodal transport:** the intermodal sector has implemented several solutions, on its own initiative, to enhance Combined Transport. The passage of a progressive amendment of the Combined Transport Directive would be needed from the side of transport politicians to match these efforts.

Developments of the Association

UIRR inaugurated three new members over the reporting period - Metrans of Czechia, VIIA of France and WienCont of Austria - while Rail Cargo Operator, one of the Continent's largest intermodal actors, also became a full member.

Four new intermodal technology partners - Combipass, GATX, RailWatch and Wielton - have joined UIRR's collaborative platforms, and two memoranda of understanding were signed - with the Rail Freight Group of the UK and USER, a Romanian logistics association - bringing the total number of national association peers of UIRR up to 14.

Outlook and expectations

The UIRR Combined Transport Sentiment Index stood at slightly positive throughout 2018. Road-Rail Combined Transport's profitability is continuously challenged, and its marketing ability is undermined by the lacking quality performance of the rail freight sector.

UIRR, as the industry association of European Combined Transport, will continue to professionally contribute to delivering the policy measures and the legislative changes necessary to realize the needed modal shift objectives of the European Union. In parallel, the association will facilitate the development and implementation of sector best practice in order to ensure a steady improvement of intermodal performance.

A broad coalition of politicians and visionary sector leaders will need to be forged to boost the market share of electric freight trains, barges and coastal navigation vessels to achieve ecologically improved surface freight transport in Europe through intermodality. There is no easier way to reduce the carbon footprint of freight transport.

Moreover, Combined Transport is a low hanging fruit to help deliver the climate goals of the COP21 Paris Agreement.

Quality

Performance of Rail Freight



Structural and regulatory factors • Primary and secondary factors determining rail freight quality • Means of addressing rail freight quality • French railway strikes • Achievements of 2018 • European projects



The door-to-door quality of Road-Rail Combined Transport is fundamentally determined by the quality performance of the mode responsible for the longest segment of the transport: rail freight. Considering the extensive role that political decision-makers play in the railway sector - both on Member State and on the European Union level - UIRR has been tasked by its members to help deliver a change for the better.

Structural and regulatory factors

The European railway sector is made up of state-owned rail infrastructure managers and railway undertakings, some of which are part state-owned companies, while others are private.

These two actors are complemented by train path allocation bodies, rail freight corridors, regulatory and safety authorities, as well as rail service facility managers to make up the sector.

Primary factors determining rail freight quality

- *Locomotives* - compatible with the undesirably diverse traction current and signalling systems of the European railway network.

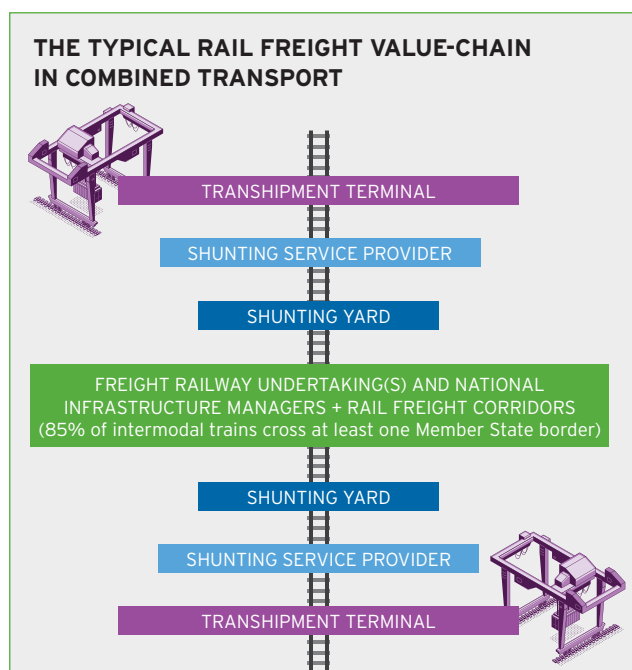
- *Certified locomotive drivers* - with the necessary training to operate on the network.
- *Train paths* - that enable the uninterrupted progress of freight trains travelling across borders and over typically much longer distances than the passenger trains that they are mixed with along the network.

Secondary factors determining rail freight quality

- *Passenger railway operations*, most of which are performed as a Public Service Obligation (PSO), that compete with freight trains for access to the infrastructure.
- *Maintenance and development works* on the infrastructure, which are funded by the taxpayer, therefore subject to public procurement and oversight by political decision-makers.
- *Insufficient infrastructure parameters* from the perspective of rail freight, which may range from bottlenecks at border crossings, lack of adequate loading gauge or axle load capacity of lines or of major engineering structures such as tunnels and bridges. Works can also be a result of degradation attributable to delayed maintenance.

Ad hoc factors of quality may be externally driven phenomena, sometimes portrayed as force majeure, such as the Rastatt-disaster in 2017, rendering a key railway line unusable for months, or the French railway strikes in 2018, which caused prolonged disturbances to the flow of traffic.

UIRR is active on all levels of the railway value-chain of Combined Transport, collaborating with every actor always with the aim to enhance their performance.



Means of addressing rail freight quality

The European Commission (DG MOVE), EUROSTAT, the European Union Agency for Railways (EUAR/ERA) and the CEN manage several aspects:

- Rail Market Monitoring Scheme
- Platform of Rail Infrastructure Managers in Europe (PRIME)
- The European Rail Network for Competitive Freight (Rail Freight Corridors)
- Dialogue platform for Railway Undertakings (RU Dialogue)
- EUROSTAT Coordinating Group for Statistics in Transport (CGST)
- EUAR Technical Specifications for Interoperability (TSIs) for wagons, operations, telematic applications for freight (TAF), as well as systems such as the Register of Infrastructure (RINF)
- The European Committee for Standardization (CEN) coordinates crucial standardisation for issues such as load securing, intermodal loading units, codification and identification of loading units

International efforts to enhance the smooth operation of rail freight:

- Organization for International Carriage by Rail (OTIF), the intergovernmental caretaker of the COTIF Agreement and its annexes for international carriage of goods by rail (CIM), dangerous goods transport (RID), as well as the potentially new annex concerning rail service facilities

- UNECE Working Party on Rail (and Intermodal) Transport (WP24)
- Organization for Co-operation between Railways (OSJD)

Railway sector actors and initiatives to deliver progress in cross-border rail freight operations:

- International Rail Transport Committee (CIT), the sector's support body for the implementation of international railway law, develops harmonised solutions of compliance
- International Union of Railways (UIC), the sectoral body to develop international railway solutions (IRS) - including for intermodal transport - such as loading, load securing, wagons, loading units and codification
- Rail Net Europe (RNE), the international body for the cross-border collaboration of rail infrastructure managers, which devises and operates IT services in support of timetabling as well as traffic and train performance management
- Rail Freight CEO Task Force, which works on matters such as the Contingency Management Handbook and the Rail Freight Forward initiative
- Sector Statement Group (SSG), a working group which develops solutions for governmental actors in Member States
- Externally funded R&D projects with an objective to enhance rail and intermodal freight transport

UIRR regularly participates in the activities of all these groups with a view (i) to represent the interests and expectations of Combined Transport and (ii) to deliver effective solutions to enhance rail freight quality performance.

The development of rail freight is of paramount interest to the European Commission. There are two main reasons for it. Firstly, freight trains dominate cross-border rail traffic. International traffic is 50% of total rail traffic volumes. This significant cross-border element gives to rail freight a stronger European dimension compared to passenger traffic (where the proportion is around 6%). It justifies the need for a cohesive and capacious European rail network to support rail freight. Secondly, rail freight is the most convincing response transport could effectively give to existing environmental challenges, in terms of both energy-efficient mobility and fewer emissions.

The Single European Railway Area unit of DG MOVE is today engaged in several activities that aim at improving the attractiveness of rail freight for shippers in view of increasing its modal share:

- Promoting and accompanying the full and timely implementation of EU law, as far as market conditions are concerned. To this end, the Commission brings together Member State representatives, railway sectoral actors and customers like UIRR in the context of its daily operations through various working groups and fora.
- Monitoring on a regular basis the development of the rail market (RMMS) through a mandatory data collection in view of measuring the effects of EU rail policies on the sector.

MAURIZIO CASTELLETTI

Head of Unit
Single European Railway Area,
DG MOVE



- Reviewing and proposing EU law: the most relevant ongoing initiative is the evaluation of the Rail Freight Corridor Regulation and the TEN-T Regulation, which may result in proposals to amend the regulations by 2021.
- Contributing to the smooth operation of rail freight by a regular revision of the regulatory framework, for example related to the timetabling process and contingency management.
- Working on specific projects related to rail freight such as the development of the Common Rail Service Facility Portal.

The European Commission has a long history in working with UIRR and its members to promote and enhance European rail freight, and we look forward to continued collaboration in order to achieve our common goals.

French railway strikes

Three months of railway strikes disrupted railway operations in France from April to June 2018. The protests have caused chaos on the tracks. Not only passengers were disturbed, but also the progression of freight trains was heavily disrupted. Traffic was adversely affected along three rail freight corridors: the NorthSeaMed, the Atlantic and the Western section of the Mediterranean - undermining the reliability not only of cross-border but also of domestic rail freight services.

Rail freight clients take somewhat longer to react to such disruptions than passengers, but lean manufacturing practices and low inventory commerce cannot tolerate a prolonged disruption of logistics chains. In case of cargo that is suited for carriage by truck, the damage to rail freight can be prolonged. Freight customers, who were forced to return to using trucks are challenging to attract back to Road-Rail Combined Transport.

UIRR has been an active participant in the crisis communication efforts on behalf of a deeply affected Combined Transport sector.

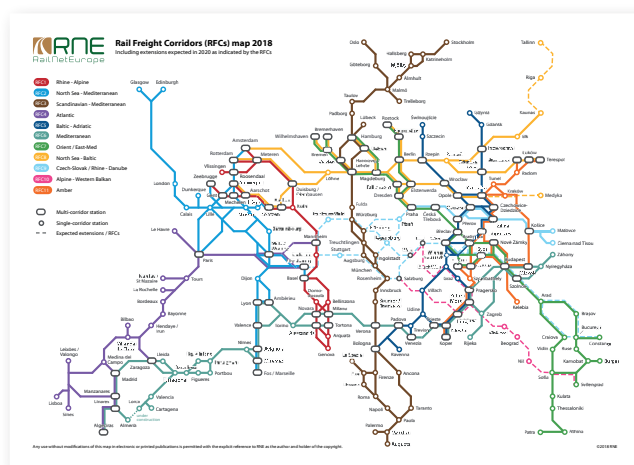


Achievements of 2018



The European Union Agency for Railways has published its report titled **"Facilitation of Combined Transport"** that was initiated and developed with material contribution of UIRR. The

report touches on issues falling into the competence of the Agency concerning rolling stock, infrastructure, information as well as process and facilitation aspects - all related to the specific requirements of Combined Transport. It is an important manifestation of a commitment to solving issues that directly impact the quality performance of rail freight.



Some Rail Freight Corridors have started publishing monthly punctuality figures that cover a large enough number of trains to be considered statistically representative. The reporting, based on data contained in RNE's Train Information System (TiS) is an important beginning of a process that should help understand the complex railway processes and the actual quality performance.



The OptiYard (Optimised real-time yard and network management) is a project, funded by the Shift2Rail program. The 13 Consortium partners under the coordination of UIC will provide tools to enhance decision support that can be directly applied to achieving enhanced yard capacity and efficiency. UIRR is overall responsible for the coordination of the two selected demonstrators: (1) Trieste (Italy) with a focus on intermodal transport with block trains and (2) Ceske Trebova (Czech Republic) - single wagonload traffic. The operators of both marshalling yards will test and validate the developed simulation and optimization modules in 2019.

More information on <https://optiyard.eu>



The objective of the CEF Transport project, ELETA, is to enable and demonstrate the generation and electronic exchange of information between all actors of the intermodal transport chain on the Estimated Time of Arrival (ETA) of intermodal freight trains. The consistent availability of reliable information on the ETA of Combined Transport trains allows more efficient resource planning by CT actors. The ELETA consortium brings together 5 CT Operators with 2 associations (KNV and UIRR) ensuring the overall (technical) coordination of the project. The functional requirements are currently implemented by the two selected service providers (HaCon and Synfoo). It will be assessed if machine-based learning algorithms are the best solutions for predictability in Combined Transport.



RAIL FACILITIES PORTAL

The project objective is to develop an efficient, user-friendly, single online source of information about rail service facilities that are covered by the Implementing Regulation on Access to Rail Service Facilities. An aim is to satisfy the data disclosure requirements defined in the Implementing Regulation and in the Rail Freight Corridor Regulation (for terminals). The consortium, which includes UIRR, has developed a web portal that enables efficient compliance for service facility operators, while offering the information in a searchable and easy exchangeable digital format as a support for the digital transformation of intermodal transport.

The portal can be viewed under <https://railfacilitiesportal.eu>.

Mode-Neutral Regulatory Environment



Combined Transport's challenge • Rail freight charges • The European Mobility Packages • Digitalisation to boost productivity • European projects



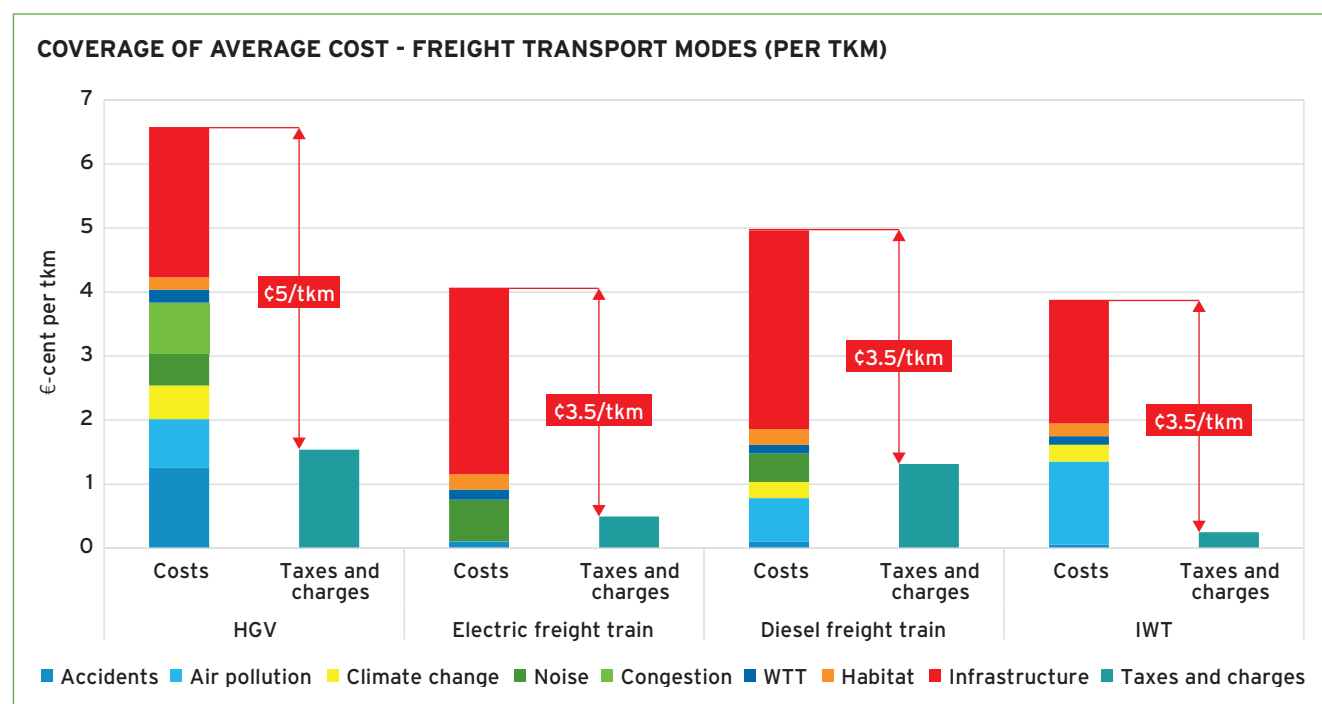
Intermodal transport combines different transport modes to perform a single goods transport operation. It is an alternative to a unimodal transport connection - i.e. performed by a single transport mode: most often end-to-end trucking. Intermodality can only be competitive if the costs of all modes of transport reflect the totality of resources used when operating them - including the charging for the use of state-owned transport infrastructure and the external costs related to their operations.

The price of transport is most easily influenced through the applied charging schemes, tax and toll levels - all of which are outputs of political decisions. Economists have been studying the effect of these decisions on transport modes and markets for several decades now, providing feedback to help the political decision-making process.

The latest update of the European Commission's Internalisation Report - prepared by a consortium led by CE Delft - uncovered the latest facts unveiled in December 2018 (see the graph below).

Accordingly, the mix of charges, tolls and taxes levied on the four modes of land transport in the European Union shows a one-sided picture: while public subsidies to trucks amount to 5 cents per tonne-kilometre, trains and barges receive only 3.5 cents.

The 1.5 cent 'advantage' enjoyed by road haulage over its modal competition translates to an annual subsidy of €30 billion (=2000 billion tkm x €0.015). Expressed in truck kilometre prices this amounts up to a 40 cent / vehicle kilometre advantage, which can be as much as 40% of the price. This explains the overuse of trucks in European logistics chains, while also reflects the lagging profitability of non-road modes of goods transport.



Source: updated European Commission Internalisation Handbook - CE Delft (2019)

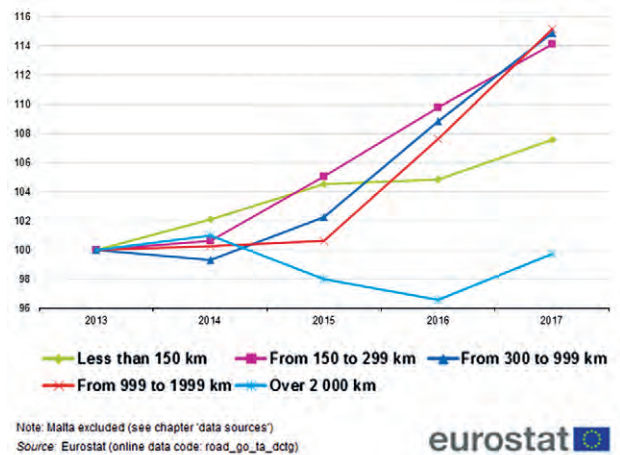
Combined Transport's challenge

Combined Transport offers the most productive transshipment methods to connect the various modes of transport. Under a fair regulatory environment each mode can perform optimally the task that is best suited to its inherent characteristics within a CT transport chain: trucks the first and final legs connecting points only accessible by road to the nearest transshipment terminal, while *trains*, *barges* and *coastal navigation* vessels covering longer distances between these cargo consolidation points.

The road haulage trend of the last five years, reflected in the graph on the right, shows that trucking has grown the most dynamically over longer distances - exactly where road haulage should not be as price-competitive. This underlines the undesirable state of politically decided charging schemes, as well as applicable tolls and tax levels.

In case politicians came to a consensus and took action towards the needed adjustments of the framework conditions, Combined Transport would immediately be capable of delivering results, as it is most competitive on exactly those longer distances, where road transport demand growth has occurred during the past years.

ROAD FREIGHT TRANSPORT BY DISTANCE CLASS, EU-28, 2013-2017
(based on tonne-kilometres. 2013=100)



In 2018 in the European Commission's Directorate-General for "Mobility and Transport" we have worked on better integrating transport to become a truly multimodal system. The two main drivers for change are digitalisation and decarbonisation.

Digitalisation paves the way for sustainable transport without congestion, without paper (e-freight, customs, tickets) and minimal costs for society. In this vision, we see mobility on demand, with connections, tracing and booking systems linking all modes into a single system. Digitalisation boosts reliability and punctuality, maximises safety, and makes best use of infrastructure and assets. Digitalisation already reduces costs (maintenance).

In November 2018, the Commission put forward the EU's long-term vision for a climate-neutral economy. For transport this means, according to our Commissioner Violeta Bulc, *"a system approach with low and zero emission vehicles, strong increase in rail network capacity, and a much more efficient organisation of the transport system, based on digitalisation; incentives for behavioural changes; alternative fuels and smart infrastructure; and global commitments. All this driven by innovation and investments."*

This tallies with the preliminary results of a study on negative effects that transport has on the environment, health, air quality and climate - the so-called external costs, presented in mid-December 2018. It finds that comparing infrastructure and external costs with taxes and charges, none of the modes today pays for the total costs for which they are responsible!

ELISABETH WERNER

Director for Land Transport,
DG MOVE



On the basis of the 'user pays' and the 'polluter pays' principles, these costs should be integrated in the price of transport and we need a better level playing field. The Commission's proposal on road charging is an important contribution to this discussion.

At the eve of the Fourth Railway Package, making the single European railway area a reality, I want rail and road transport to become more complementary and combined transport to be a success. Combined with ERTMS deployment, the simplification of national rules, and a decisive approach to rail innovation, this will lead us to a scenario in which trains will run on all European infrastructure, based on a single set of rules. As a result, rail will be more attractive to freight customers.

Quite simply: if we are serious about our climate objectives the most energy efficient mode of transport should carry more cargo and be a reliable partner for logistics.

Rail freight charges

Member States were in the process last year of revising their track access charge regimes in reflection of EU law adopted in 2012. This has meant that in some countries, like Sweden or The Netherlands, the previously applied charging principles will have to be adjusted, resulting in continuous track access charge increases over the coming years. Other Member States are planning to introduce 'market segmentation' when determining mark-ups that may affect freight operators. Since track access charges are a significant portion of the fee payable for rail freight traction, the overall costs of rail freight are bound to increase in several Member States.

Simultaneously, understanding the competitive struggles of rail freight, a growing number of Member States have begun implementing track access charge reduction schemes for freight trains: Germany, Italy and Austria were at the forefront of the initiative that is now spreading to other countries as well. The overall impact is yet to be seen, but the hopes are high that a correction in the market begins.

The European Mobility Packages

Discussions of the reforms to the laws related to working and resting time, as well as the social rights of truck drivers, posting of (transport) workers and access to the

road haulage market, proposed by the European Commission in 2017, have progressed over the course of 2018. Both the European Parliament and the European Council agree that something needs to be done to correct the anomalies that emerged over the decades. UIRR hopes that a common ground will be found between the co-legislators which protects the openness of the market on the one hand, while adjust fairly the daily rules of operations and the charges, tolls and taxes levied on the other. Achievements of a fair competitive marketplace should not be lost in this process.

Digitalisation to boost productivity

The European Commission's proposed new Regulation for Electronic Freight Transport Information (eFTI) is an initiative that has the potential to propel the entire European transport and logistics sector into the 21st Century. The envisioned digitalisation will permit the abandoning of paper forms - considerably reducing the bureaucratic burden, while boosting the productivity of enforcement, thereby contributing towards fair and lawful daily operations. The adoption of the new Regulation will only be a beginning, as four critical delegated acts will need to be then drafted to lay out the roadmap towards implementing the desired digitalisation. Special care and prudence will be in order, as significant investments will be needed from both the market and the Member State government sides.



The overall objective of the H2020 project AEROFLEX is to develop and demonstrate new technologies, concepts and architectures for complete vehicles with optimised aerodynamics, powertrains and safety systems, and flexible and adaptable loading units with advanced interconnectedness contributing to the vision of a "physical internet".

UIRR's role in the project consortium is to ensure the intermodal transport compatibility of the technical solutions devised by the AEROFLEX partners and to coordinate an intermodal test to demonstrate that the aerodynamic features fitted on the semi-trailers are fully interoperable with different types of railway wagons (horizontal and vertical techniques) and can be safely transported during the railway journey.

Enhancement of Intermodal Transport



Amendment of the Combined Transport Directive

- Digitalisation to Boost Intermodality
- The ILU and Wagon Platform
- Services to Support Daily Operations
- European projects



Containerization has revolutionised intercontinental trade after World War II. Dating from the oil crisis in the late 1960s, Combined Transport and the intermodal loading unit - containers, swap bodies and (craneable) semi-trailers - have made the advantages of intermodal transport available to continental transport chains. Quick and efficient transshipment of both bulk and non-bulk cargo has become possible between the different modes of surface transport, in quantities of both half a truckload and a full truckload. Multimodality has been a part of European freight logistics for over half a Century.

Combined Transport is the sub-category of intermodal transport, where the road legs of the transport chain are kept to a minimum, while aiming to maximise the distance performed by the non-road mode(s) of the transport operation. A variety of business models and market segments exist and compete in parallel in today's European intermodal marketplace: from door-to-door CT Operators to road-rail carriers, from continental to port hinterland specialists, regional and continent-wide actors, big and small are busy to bring intermodality to the buyers of goods transportation.

Combined Transport has been a freely competing transport service in Europe since 1975, when the legal requirement for a permit to conduct the business were dropped. The sector has developed without much political interference, mostly on its own initiative. Switzerland and Austria excelled by making Combined Transport a main pillar of their transport masterplans. Towards the end of the second decade of the 21st Century, Combined Transport is looking for a fair chance to compete based on the technical merits that it possesses and the management excellence of those who organize it. UIRR, as the industry association of the sector, plays a pivotal role in both achieving the external conditions needed and in developing best practice.



Amendment of the Combined Transport Directive

The legislative process of the European Commission's proposed amendment of the 27-year-old Combined Transport Directive that was tabled in November 2017 progressed considerably, though it is far from being resolved. A year-and-a-half were needed for both co-legislators, the European Parliament and the European Council, to arrive at a position. What remains is to bring these positions onto a common footing - in the process known as "trialogue".

The trialogue has started in January 2019. The three compromise proposals crafted by the Romanian Presidency failed to gain the endorsement of the Member States, hence meaningful negotiations could not begin.

The talks will continue after the European Parliament election of May 2019.

UIRR is hopeful that the now nearly seven-year-long process of amending the Directive - which began with selecting the consultants, who aided the drafting of the Commission proposal - will come to successful conclusion before the end of 2019. The overcoming of the differences between the Commission proposal, the enhanced but quite similar Parliament position and the Member States' general approach will need a lot of ingenuity from the parties involved in the trialogue. A middle ground will have to be found that delivers the original aims of the amendment.



2018 was a year of Multimodality and the Commission focused on a number of important themes - infrastructure, digitalisation, economic incentives and passenger multimodal liability. The year offered achievements; lessons learnt and, perhaps, missed opportunities. Nevertheless, it is clear that we have been on the right track - infrastructure, digitalisation, new services, and level playing field are the important topics, also for our future work.

For the Combined Transport sector, this year was marked by long and intensive discussions on the Commission proposal for amending the Combined Transport Directive. The Commission's aim was clear: extend the support to combined transport, make it easier to use the directive, avoid abuses and ultimately encourage greater modal shift. However, despite the efforts put by all institutions, an agreement on provisions that would improve the Directive could not be reached. While the work to that end may resume in the new Parliament, the Commission is committed to avoid reducing the support for Combined Transport below today's level: this would bring back a significant amount of freight on long-distance road transport and compromise the sustainability of our transport system. The Commission insists on the importance of decarbonising transport and will consider new initiatives to raise the competitiveness of combined transport versus long-distance road haulage.

The digitalisation of freight transport has also been making considerable progress in the last year and months. The Regulation on a European Maritime Single Window environment will soon enter into force; the European Parliament and Council are examining the Commission proposal for a regulation on electronic freight transport information (eFTI); the

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DG MOVE



Digital Transport & Logistics Forum is laying the foundation for an efficient and trusted sharing of freight-related data between administrations and logistics stakeholders.

Last, but certainly not least, in 2018 we have called for more and better funding of transport infrastructure with the CEF II proposal in which €30 billion is earmarked for transport. In addition, in 2018, we established a dedicated CEF programme for multimodality and digitalisation, with a budget of €450 million that had, for the first time, a specific priority for Combined Transport. This resulted in the selection of more than 20 "multimodality" projects recommended for funding for a total value of €109 million.

More than ever, the Commission is committed to work with all freight stakeholders and I call on everyone to work with us and within the sector to identify and overcome the remaining hurdles for more efficient and sustainable transport and a cleaner environment.

Digitalisation to Boost Intermodality

The UIRR Interest Group on Digitalisation has developed the CT Digitalisation Roadmap adopted by UIRR's General Assembly in 2019. The Roadmap is a product of a broad sectoral collaboration. It lays out the structure of digital solutions to be developed by the various types of actors of the intermodal transport chain - reflecting on the initiatives pursued within the road and the railway sectors, as well as the Modernised Customs Code and the Electronic Freight Transport Information Regulation (eFTI).

Digitalisation is expected to release constructive forces to boost intermodal transport's productivity through effectively mitigating its complexity. UIRR will remain an active facilitator of the European intermodal sector's own digitalisation efforts and will potentially become the operator of databases, as well as the host of digital systems that are ideally handled from a single location, to serve the needs of the entire sector.

The ILU and Wagon Platform

Launched officially in 2017, under the UIRR Technical Interest Group, the UIRR Collaborative Platform on Intermodal Loading Units and Wagons is a group of experts, who aim to improve interoperability and connectivity in the intermodal logistics chain, focusing on the transport modes 'road' and 'rail'. The Platform carries out the following tasks:

- the analysis of the road and rail legislation impacting the overall interoperability of Combined Transport,
- the development of recommendations towards standardization,
- the identification of market trends and
- the development and exchange of best practices and innovations.

Participation in the Platform is open to any European entity dealing with ILUs and wagons through the signature of a partnership agreement, as well as to all UIRR members. Mentorship of the Platform is currently carried out by Lohr Industry.

Services to Support Daily Operations

Digital services: UIRR celebrates together with the active partners the 15-year Anniversary of CESAR, the intermodal tracking and tracing system developed with European Union support. The association is a shareholder and active facilitator of the system.

UIRR also operates several databases and issues various codes to enable the operation of IT systems. The EDIGES data exchange standard, developed and disseminated as an industry best practice, is also managed by the association.

The ILU-Code owner identification marker: UIRR is not only the Administrator of the ILU-Code, responsible for issuing ILU-Code owner-keys and maintaining the Register of ILU-Code owner-key registrants, but is also engaged in developing a Register of Intermodal Loading Units based on the individual ILU-Codes, as well as other services that will deliver value to the intermodal operators and terminal managers.

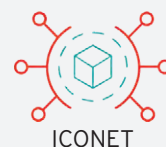


Projects for intermodal actors: besides developing solutions using own resources, UIRR is also involved in projects that receive external funding to devise new systems and solutions that will ultimately help the organisation of intermodal transport and the management of terminals.

COMBINE

Funded under the INTERREG BSR program, COMBINE aims at enhancing the share of Combined Transport (CT) in the Baltic-Sea-Region (BSR) in order to make transport more efficient and environmentally friendly. In the BSR, due to a long tradition of road-only transport, competition between intermodal and road transport is difficult. This results in a lack of experience and insufficient knowledge about CT and thus a low exploitation of CT's potential.

COMBINE will overcome these challenges. New technologies for the non-road main-leg transport, terminal handling and last mile operation as well as modern and efficient transport organisation concepts are all opportunities for the BSR. COMBINE follows a comprehensive transport service-related approach to strengthen all parts of the transport chain: main leg, terminal handling and last mile.



ICONET, a 30-month project funded by the EU's H2020 program, will significantly extend the state-of-the-art research and development around the Physical Internet (PI) concept. The ICONET Proof of Concept will be deployed, tested, refined and extended in four industry-driven PI living labs (PI Hub, PI corridor, PI e-Commerce and PI Warehousing).

UIRR is the coordinator of the Living Lab 1 whose objective is to create the foundations of a potential PI Hub in the area of the Port of Antwerp. The Antwerp Port Authority is currently developing a Rail Traffic System for all railway actors active in the port (terminal operators, railway undertakings, Combined Transport operators, end customers).

The Year in Brief

Activities of the Association



UIRR's mission • Organigramme • Highlights of 2018 • UIRR today • An open invitation



UIRR is the European industry association of Combined Transport. The association binds together Combined Transport Operators, Transshipment Terminal Managers, technology providers and various associations committed to coordinate the development of intermodal freight transport in Europe. UIRR also builds numerous bridges towards shippers, stakeholders of related transport modes and operators of different types of transport infrastructure.

UIRR's mission

UIRR, the industry association for the advancement of Combined Transport in Europe, aims to achieve its mission through focusing on the following three areas:

- Quality performance of rail freight
- Fair and mode-neutral regulatory framework
- Enhancement of Combined Transport

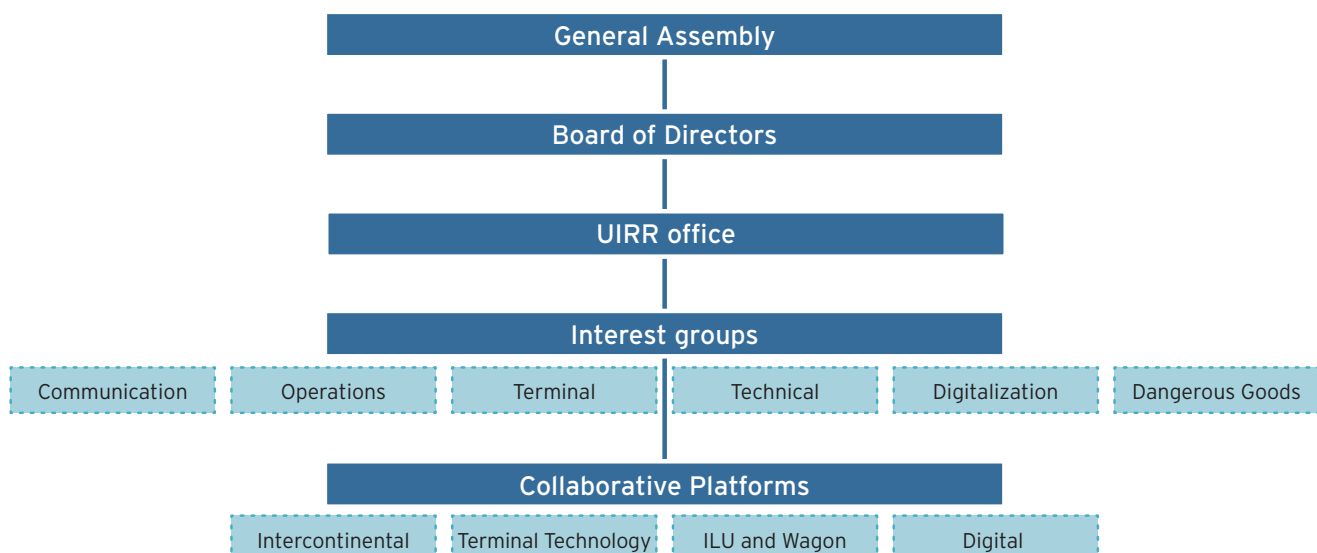
The association's six interest groups and the attached collaborative platforms, as well as the associates of UIRR, focus on these concerns during their activities.

This Report is also structured so as to reflect progress in the three areas.



Marco Gosso; Thibault Fruitier, Vice Chairman; Irmtraut Tonndorf
Rainer Mertel; Christopher Müller; Ben Beirnaert; Ralf-Charley Schultze, President

Organigramme



Highlights of 2018

January: UIRR-IANA Intermodal Exhibition (in the European Parliament building) and European Logistics Platform conference on intermodal transport

February: ELETA and Rail Facilities Portal project meetings

March: OptiYard Project kick-off meeting, Commission Conference on Multimodality

April: Track Access Charging Conference, presentation of the Aiuto report on the CT Directive in the European Parliament

May: ERA-UIRR Intermodal Conference, ELETA and Aeroflex Project meetings, European Intermodal Logistics Conference

June: Hupac 50-year Anniversary event, UIC Global Rail Freight Conference

July: FIATA-OSJD conference, European Parliament Transport Committee vote on the CT Directive

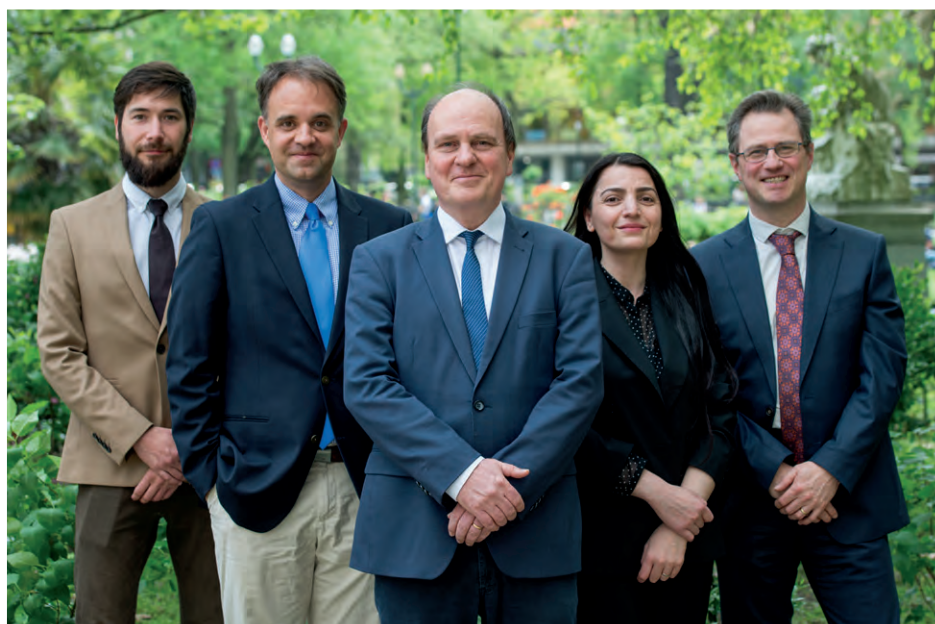
August: UIRR Nordic Intermodal Seminar

September: Rail Facility Portal and ELETA project meetings, UIRR Intermodal Seminar for Transport Attachés, DB Cargo Continental Conference, UIC-International Energy Agency Conference on Rail Freight

October: EU Agency for Railway Report on Facilitation of Combined Transport, Aeroflex Project conference, RASCOP Standardization meeting

November: Logitrans Intermodal Panel, SGKV Terminal Tagung, Commission Meeting on Tunnels and Gauges, IRG Rail Conference

December: Rail Freight Day Conference, European Council vote on the CT Directive, Commission Internalization Conference



The UIRR team - from left to right: Mateusz Nowak, Digital Project Officer, Ákos Érsek, Chief Policy Advisor, Ralf-Charley Schultze, President, Pekiye Biçici, Assistant to the Management, Eric Feyen, Technical Director.

UIRR today

During the reporting period 2018-19 UIRR has been reinforced by:

New members: Metrans of Slovakia, Viia of France and WienCont of Austria



New partners: Combipass, GATX, RailWatch and Wielton



New peers with memoranda of understanding: the Rail Freight Group of the UK and the Romanian Logistics Association USER.



As of January 2019, UIRR had 39 members from 18 Member States of the European Union and Switzerland. UIRR formally recognizes 15 technology partners, while Memoranda of Understanding have been concluded with 14 peer associations.

An open invitation

UIRR maintains its doors open towards all Combined Transport Operators and Terminal Managers active in the European marketplace. Companies from various Combined Transport operating models and every business size are welcome to join the association.

Additional Memoranda of Understanding are continuously being developed with associations committed to intermodal transport on a Member State level to enhance the network of communication towards ministries of transport.

Partners from among the companies with an interest in intermodal freight transport are regularly sought out to work with UIRR, its members and collaborative platforms with the common aim to enhance intermodal transport.

UIRR collaborates with every European stakeholder and peer group, participates in all initiatives aiming to reach the goals that take it closer to achieving the association's declared objectives.

FOUR CASES OF ONE-OFF DEVELOPMENT CONTRIBUTED TO THE OUTPUT OF UIRR'S CT OPERATOR MEMBERS IN 2018



Hupac acquired European Rail Shuttle B.V. (ERS Railways) of The Netherlands in 2018, whereby the operator not only added ERS's more than one hundred thousand TEU of intermodal transport volume to its own traffic, but also enriched the range of the Group's capabilities with railway traction.



Metrans took over the membership of its German-Polish specialist subsidiary, Polzug – a member of UIRR since 2006, which was responsible for a traffic of 120 000 TEU – after integrating the company and its activities into the Metrans corporate structure. Metrans is one of Europe's largest CT Operators with an annual traffic performance well in excess of 1 million TEU.



Novatrans acquired French CT Operator, Greenmodal, whose 100 thousand TEU annual intermodal transport volume, realised along mainly domestic port hinterland routes, was added to the UIRR-founding member parent company's traffic.



Rail Cargo Operator has been a member with its Czech and Hungarian subsidiaries until the end of 2017 when the entire RCO Group acceded to the Association. This translated to a four-fold increase in the reported number of intermodal consignments carried. RCO falls into the category of 'very large CT Operator' – alongside Hupac, Kombiverkehr and Metrans.

Because of these one-off developments, which add to the annual organic growth, UIRR members' annual transport volume reached a historic high of nearly 8.6 million TEU in 2018.

Partners and Peers

PARTNERS



COLLABORATIVE PLATFORMS
UIRR OPERATORS



GOVERNMENTAL BODIES



European industry associations typically operate in a complex environment, primarily consisting of various governmental bodies, industry association peers and members. In case of UIRR, this is further complicated by the circumstance that UIRR is not a federation, hence it has no national association members. Therefore, UIRR has aimed to structure its collaboration with national associations committed to the promotion of Combined Transport; which increases the outreach to the Member States. For a similar reason, UIRR engages strategically important suppliers of intermodal technologies through its Collaborative Platforms - indicated under "Partners" below.

MoU PEERS



Member Companies



New Members

Metrans



Metrans is one of Europe's largest Combined Transport Operators. The Czechia-based company is a wholly owned subsidiary of the Hamburger Hafen und Logistik AG (HHLA). Metrans became a member of UIRR after Polzug, a former member of UIRR also owned by HHLA, has been merged into the company.

Metrans provides all-inclusive, just-in-time intermodal rail-road transportation solutions. The company operates its own shuttle trains with cargo in maritime - deep sea and short sea, reefer, tank and special containers to/from Czechia, Slovakia, Hungary, Germany, Benelux, Austria, Slovenia and Poland. Metrans's intermodal shuttle trains provide a link between these countries and major European ports, including Hamburg, Bremerhaven, Rotterdam and Duisburg in the North, as well as Koper, Trieste and Rijeka to the South.

Metrans also manages highly sophisticated container terminals and container depots strategically located throughout Central Europe located in Prague, Ceska Trebova, Dunajska Streda, Budapest and Poznan. Additionally, Metrans delivers intercontinental intermodal cargo to Europe via Malaszewicze/Brest and Dobra.

<https://www.metrans.eu>

VIIA



VIIA offers an experience in combined transport by developing offers and services to integrate intermodal solutions into transport-chains, whether the shipper is already used to intermodal transport, or not. The company specializes in the unaccompanied transport of semi-trailers by train using a network of railway lines, not motorways. The so-called 'VIIA Rail Motorways' are an innovative solution to transport of any type of cargo that can be loaded onto a semi-trailer.

VIIA brings together high frequency services that connect terminals open 24/7. Some of these utilise a horizontal loading technique which allows the quick transshipment of non-craneable trailers onto the specialized low pocket wagons. These low wagons enable rail transport of regular semi-trailers over less-than P400 railway lines, whereas these trailers would require a P400 loading gauge if carried in vertically loaded pocket wagons.

The company operates 88 trains weekly and has transported over 106.000 consignments in 2018.

<https://www.viia.com>

WienCont



With a storage capacity of around 10,000 TEU combined with state-of-the-art technology and many years of experience, WienCont's trimodal terminal - the largest in Austria - is capable of handling more than 400,000 TEU per year with 3 gantry cranes and 15 container forklifts on approximately 170,000 m² of terminal space.

3 domestic and 13 European terminals are connected directly from the WienCont Terminal, while an additional four may be reached through a hub in Budapest. 19 different CT operators use the services of this transparently functioning, neutral, open access terminal. Container depot, repair and specialised refrigerated container maintenance services are also offered.

In 2019 WienCont foresees to grow the number of trains to/from the terminal to 100 per week.

<https://www.wiencont.com>

Member Company Information



ADRIA KOMBI d.o.o.

Tivolska 50
SLO - 1000 Ljubljana
Tel.: +386 1 23 45 280
Fax: +386 1 23 45 290
infor@adriakombi.si
www.adriakombi.si

Activities: UCT - RoMo - RSO - RH - ECM
Agency: SI
Total traffic: 325,000 TEU
Revenue: € 39 million



SOCIETÀ ALPE ADRIA S.p.A.

Via S. Caterina da Siena, 1
I - 34122 Trieste
Tel./Fax: +39 040 63 92 33
amministrazione@alpeadria.com
www.alpeadria.com

Activities: UCT - RoMo
Agency: IT
Total traffic: 120,000 TEU
Revenue: n/a



AMBER RAIL a.s.

Lazaretská 23
SK - 811 09 Bratislava
www.amberrail.com

Activity: UCT
Agencies: HU - RO - SRB - MK
Total traffic: 19,000 TEU
Revenue: € 3.1 million



AMBROGIO TRASPORTI S.p.A.

Via Tognasca 5
I - 21013 Gallarate
Tel.: +39 0331 404 500
Fax: +39 0331 776 366
ambrogio@ambrogio.it
www.ambrogio.it

Activities: UCT - TTO - TTM - RH - ECM
Agencies: IT - BE - FR - DE
Total traffic: 88,000 TEU
Revenue: n/a



BALTIC RAIL AS

Tulika 15/17
EE - 10613 Tallinn
Tel./Fax: +372 661 3118
Booking@BalticRail.com
www.balticrail.com

Activity: UCT
Agencies: PL - SLO
Total traffic: 13,000 TEU
Revenue: € 7.7 million

Baltic Rail, an independent container train operator specializing in connecting the Adriatic and Baltic Seas to terminals in Wrocław and Katowice in Southern Poland, has celebrated its 10th anniversary in 2018.

2018-2019 saw dynamic growth in traffic volume resulting in increased regularity of our services. Based in Tallinn, Estonia we also have specialist 1520mm gauge experience.



Stephen Archer



BOHEMIAKOMBI, spol. s r.o.

Opletalova 6
CZ - 113 76 Praha 1
Tel.: +420 2 42 444 560
Fax: +420 2 42 444 924
info@bohemiakombi.cz
www.bohemiakombi.cz

Activity: UCT
Agency: CZ - SK
Total traffic: 18,000 TEU
Revenue: € 5.4 million



CARGOBEAMER AG

Handelsplatz 1b
D - 04319 Leipzig
Tel./Fax: +49 341 652358 0/-29
www.cargobeamer.com

Activity: UCT
Agencies: DE - CH - IT
Total traffic: 25,000 TEU
Revenue: € 10 million

After introduction of first CargoBeamer combined rail/road trains in 2015, the market introduction of CargoBeamer's innovative service has now been completed. More than 400 Mio. ton-km were already shifted from road to rail, a double-digit number of road forwarders decided not to rely on road only but to use the new rail/road service. CargoBeamer continues to realize a European-wide network of automated high-capacity terminals for loading/unloading of all standard-semi-trailers onto rail wagons.



Hans-Jürgen Weidemann



CFL INTERMODAL

Terminal Intermodal
Eurohub Sud
L - 3434 Dudelange
Tel.: +352 4996-0001
Fax: +352 4996-0150
info@cfl-intermodal.lu
www.cfl-intermodal.lu

Activity: UCT
Agency: LU
Total traffic: 137,000 TEU
Revenue: n/a



COMBIBERIA S.A.

Rafael Herrera, 11 Pta 203
E - 28036 Madrid
Tel./Fax: +34 91 314 98 99
info@combiberia.com
www.combiberia.com

Activity: UCT
Agency: ES
Total traffic: 43,000 UTI
Revenue: € 3.2 million



COMBINANT NV

Scheldelaan 800 - haven 755
B - 2040 Antwerpen
Tel./Fax: +32 3 250 62 62
info@combinant.be
www.combinant.be

Activity: TTM
Agency: BE
Total traffic: 138,500 units
Revenue: € 7.8 million

**CROKOMBI d.o.o.**

Ul. A. Hebranga 10
HR - 10000 Zagreb
Tel.: +385 1 61 51 867
Fax: +385 1 61 51 869
crokombi@crokombi.hr
www.crokombi.hr

Activity: UCT
Agency: HR
Total traffic: 22,000 TEU
Revenue: €1.8 million

**CTE CONTAINER TERMINAL ENNS GmbH**

Ennshafenstrasse 45
AT - 4470 Enns
Tel.: +43 7223 81347
Fax: +43 7223 81348
customer-service@ct-enns.at
www.ct-enns.at

Activity: TTM
Agency: AT
Total traffic: 400,000 TEU
Revenue: n/a

CT Enns is a major TriModal terminal on the Danube in Upper Austria - operated by the M. Kaendl Group.

Following rapid growth of the terminal, the €8,23 million capacity extension project of CT Enns has recently been chosen for support under the EU Connecting Europe Facility. New OCR video-gates, a gantry crane and improved rail feeder access will contribute considerably to the transshipment capacities of the terminal.



Otto Hawlicek

**DB Cargo Eurasia****DB CARGO EURASIA**

Bellevuestraße 3
DE - 10785 Berlin
Tel.: +49 30 297 54 804
<https://eurasia.dbcargo.com>

Activity: UCT
Agency: DE - CN - RU
Total traffic: 51,000 TEU
Revenue: n/a

**EUROPA MULTIPURPOSE TERMINAL (EMT) S.p.A.**

Punto Franco Nuovo - Molo VI
I - 34123 Trieste (TS)
Tel.: +39 040 3220333
Fax: +39 040 3224484
info@emterminals.com
www.emterminals.com

Activities: TTM - UCT
Agency: IT
Total traffic: 51,315 ITU (45' equivalent)
Revenue: €11.1 million

**IMS CARGO AUSTRIA GmbH**

Trillergasse 8
A - 1210 Wien
Tel.: +43 1 20168 0
Fax: +43 1 20168 8840
sales@imscargo.com
www.imscargo.com

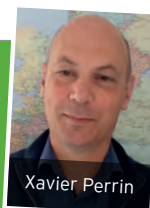
Activity: UCT
Agencies: AT - BE - CH - ES - DE - HU - NL - SK - PT
Total traffic: 33,000 TEU
Revenue: n/a

**DELTA 3 SPL**

7 Boulevard Louis XIV
F - 59000 Lille
Tel.: +33 3 281 690 70
delta@delta-3.com
www.delta-3.com

Activities: UCT - TTM - ECM
Agency: FR
Total traffic: 300,000 TEU
Revenue: n/a

The long-standing major cargo hub in Douges, in the Pas-de-Calais region of Northern France, Delta 3 has reached major performance goals in 2018. Considerable new warehousing space has been inaugurated, while the decision was made to extend the exterior container storage space by a further 5000 units. Several new domestic and cross-border intermodal train services were launched in 2018 that provide regular connections to Marseille, Spain, the UK, Eastern Europe and even China.



Xavier Perrin

**FELB**

Rivergate Handelskai 92
Gate 2/3.OG/TOP G
A - 1200 Vienna
Tel.: +43 (1) 890 63 39 0
Fax: +43 (1) 890 63 39 63
sales@felb.world
www.felb.world

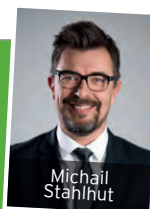
Activity: UCT
Agencies: DE - PL
Total traffic: 49,000 TEU
Revenue: n/a

**HUPAC GROUP**

Viale R. Manzoni 6
CH - 6830 Chiasso
Tel.: +41 588558000
Fax: +41 588558000
info@hupac.com
www.hupac.com

Activities: UCT - TTM - RSO - ECM - RU - CA
Agencies: BE - CH - DE - IT - RO - PL - NL - RU
Total traffic: 1,72 million TEU
Revenue: €502 million

Hupac has grown its own network and through acquisition of ERS Railways in 2018. Besides injecting reserves into the system, the task now is to improve punctuality and reliability through constant dialogue with all parties involved. Hupac expects infrastructure managers and transport ministries to engage for freight - for example, by improving works planning and by strengthening European rail freight corridors.



Michail Stahlhut

**JOHN G RUSSELL Ltd.**

Deanside Road, Hillington,
Glasgow. G52 4XB UK
Tel./Fax: +44 141 810 8200
sales@johngrussell.co.uk
www.johngrussell.co.uk

Activities: UCT - TTM - RH
Agency: UK
Total traffic: n/a
Revenue: £62 million

Member Company Information



KOMBIVERKEHR GmbH & Co. KG

Zum Laurenburger Hof 76
D - 60594 Frankfurt
Tel./Fax: +49 69 79 50 50
info@kombiverkehr.de
www.kombiverkehr.de

Activities: UCT - TTM - RSO - ECM - RU
Agencies: CZ - DE - ES - IT - NL - SE
Total traffic: 1,450,000 TEU
Revenue: n/a

Kombiverkehr, a founding member of UIRR and operator of one of Europe's largest Combined Transport networks, celebrates the 50th Anniversary of its founding in 2019. The company's 2018 traffic was negatively impacted by the excessive works and the related rail freight quality performance deficiencies in Germany. Kombiverkehr expects more European harmonization of railway rules during the coming years.



Armin Riedl



LINEAS INTERMODAL (IFB nv)

4 Roderveldlaan
B - 2600 Berchem
Tel.: +32 3 270 27 00
Fax: +32 3 226 26 26
info@lineas.net
www.lineasintermodal.net

Activities: UCT - TTM - ECM - CA - RH - RSO
Agencies: BE - DE - IT
Total traffic: 560,000 TEU
Revenue: € 120 million



LUGO TERMINAL S.p.A.

Via della Dogana 5
I - 48022 Lugo (RA)
Tel.: +39 0545 216411
Fax: +39 0545 210987
info@lugoterminal.com
www.lugoterminal.com

Activities: TTM - UCT
Agency: IT
Total traffic: 31,000 TEU
Revenue: € 16 million



METRANS

Podleska 926/5
CZ - 104 00 Praha 10
Tel.: +420 267 293 111
www.metrans.eu

Activities: UCT - TTM - RSO - ECM - RU - CA - RH
Agency: CZ - SK - PL - HU - AT - SI - IT - NL - DE
Total traffic: 1,17 Mio TEU
Revenue: over € 400 million

METRANS provides all-inclusive, just-in-time intermodal rail-road transportation solutions throughout the Eastern half of Europe. The company operates own shuttle trains to and from Czechia, Slovakia, Hungary, Germany, Benelux, Austria, Slovenia and Poland, thereby linking these countries by rail with major European ports and providing links to the European continental hinterland and the Silk Road as well. The Metrans network consists of 500 trains per week providing frequent connections between 15 terminals and ports.



Peter Kiss



MERCITALIA INTERMODAL S.p.A.

Via Valtellina 5-7
I - 20159 Milano
Tel.: +39 02 668 951
Fax: +39 02 668 00 755
info@mercitaliaintermodal.it
www.mercitaliaintermodal.it

Activities: UCT - RSO - ECM
Agency: IT
Total traffic: 704,000 TEU
Revenue: € 208.7 million



NAVILAND CARGO SAS

26 Quai Charles Pasqua
CS 10095
F - 92309 Levallois Perret Cedex
Tel.: +33 1 41 05 33 01
Fax: +33 1 40 87 08 20
contact@naviland-cargo.com
www.naviland-cargo.com

Activities: UCT - TTM - RSO - RU
Agency: FR
Total traffic: 335,000 TEU
Revenue: € 120 million

Naviland Cargo, a subsidiary of SNCF Cargo, operates a network of Combined Transport trains that spans most of France. The company started out as a port hinterland specialist, but by today it also operates cross-border trains. TT transshipment terminals are also operated by Naviland Cargo, which has its own traction capabilities too. In 2018 the traffic performance of Naviland grew by almost 12%.



Charles Puech d'Alissac



NOVATRANS SAS

10 rue Vandrezanne
CS 91397
F - 75634 Paris Cedex 13
Tel.: +33 1 85 34 49 00
www.novatrans.eu

Activities: UCT - TTM - RSO
Agencies: FR - IT
Total traffic: 347,000 TEU
Revenue: n/a



ÖBB-INFRA AG - TSA

Praterstern 3
A - 1020 Wien
terminal@oebb.at
infrastruktur.oebb.at

Activities: UCT - RoMo - TTM
Agency: AT
Total traffic: n/a
Revenue: n/a



KTL KOMBI-TERMINAL LUDWIGSHAFEN GmbH

Am Hansenbusch 11,
D - 67069 Ludwigshafen/Rhein
Tel./Fax: +49 621 659 13 0
info@ktl-lu.de
www.ktl-lu.de

Activity: UCT
Agency: DE
Total traffic: 354,414 Loading Units
Revenue: € 22 million

Activities - glossary:

UCT: Unaccompanied Combined Transport
RoMo: Rolling Motorway
TTM: Transshipment Terminal Management

RSO: Rolling Stock Operator (owner / lessee)
ECM: Entity in Charge of Maintenance
RU: Railway Undertaking

CA: Customs Agent
RH: Road Haulage



RAIL CARGO OPERATOR

Žerotínova 1132/34
CZ - 130 00 Praha 3
Tel.: +420 220 193 200
www.railcargoperator.cz

Activities: UCT - TTM - RoMo - RSO
Agencies: CZ - AUT - SK - HU
Total traffic: 1,12 million TEU
Revenue: € 244,8 million

Rail Cargo Operator, which integrated UIRR founding member and leading RoLa operator, Ökombi, has completed its complex corporate and service restructuring. The RCO Group network extends to Czechia, Austria, Germany, Slovakia and Hungary and relies on own terminal structure. Beside the maritime traffic to European ports, RCO focuses on the intermodal land route from Turkey to Western Europe with Terminal Bilk Budapest as a hub in Central Europe



Christopher Müller



RAIL CARGO TERMINAL - BILK Zrt.

Europa utca 4.
H - 1239 Budapest
Tel./Fax: +361 2896000
titkarsag.rct.bilk@railcargo.com

Activity: TTO
Agency: HU
Total traffic: 208,746 TEU
Revenue: € 8.06 million



RAILPORT ARAD SRL

P.O. Box 10.
RO 315200 - Curtici FN
Tel.: +40 357 100 189
Fax: +40 357 100 190
office@railportarad.ro
www.railportarad.ro

Activity: TTM
Agency: RO
Total traffic: 90,000 TEU
Revenue: € 2.5 million



RALPIN AG

Römerstrasse 3
CH - 4601 Olten
Tel.: +41 58 822 88 88
Fax: +41 58 822 88 80
www.ralpin.com

Activities: RoMo - ECM
Agencies: CH - DE - IT
Total traffic: 208,000 TEU
Revenue: n/a



ROCOMBI SA

Blvd. Dinicu Golescu 38
RO - 010873 Bucharest
Tel./Fax: +40 21 312 23 14
office@rocombi.ro
www.rocombi.ro

Activities: TTM - UCT
Agency: RO
Total traffic: 12,000 TEU
Revenue: € 1.5 million



SINDOS RAIL SERVICES - SRS S.A

Industrial Area of Thessaloniki
GR - 570 22 Sindos, P.O. Box 1099
Tel.: +30 2310576991
Fax: +30 2310576997
Antonia.Giannakopoulou@srs-sa.gr
<http://srs-sa.com>

Activity: TTM
Agency: GR
Total traffic: n/a
Revenue: n/a



T3M

11 rue Maryse Bastié - ZI de la Lauze
F - 34430 St Jean de Vedas
Tel: +33 4 67 27 18 51
info@t3m.fr
www.t3m.fr

Activities: UCT - TTM - RH - RSO
Agencies: FR - IT
Total traffic: 232,000 TEU
Revenue: € 50 million

T3M, founded in 2000, is a French combined road rail operator. The company obtained the authorized applicant status to control its own train paths in 2008.

T3M operates 24 connections linking 12 terminals (11 in France and 1 in Italy). Paris, Lille and Marseille are the major hubs of the T3M network.

Two new services of T3M are Paris - Mouguerre and Lille-Avignon-Marseille.



Jean-Claude Brunier



TC ATHUS SA

Rue du Terminal 13
B - 6791 Athus
Tel./Fax: +32 63 380020
infotca@tca.be
www.tca.be

Activities: UCT - TTM - RH
Agency: BE
Total traffic: 77,976 TEU
Revenue: n/a



VIJA

Espace Seine, 26 quai Charles Pasqua
FR - 92300 Levallois-Perret
Tel.: +33 1 56 76 75 77
www.vija.com

Activity: 'Rail Motorways'
Agencies: FR - ES - IT - LU
Total traffic: 106,614 units
Revenue: n/a



WIENCONT

Freudenauer Hafenstrasse 8-10
A - 1020 Vienna
office@wiencont.com
www.wiencont.com

Activity: UCT
Agency: AT
Total traffic: 400,000 TEU
Revenue: n/a

Countries: AM (=Albania), AT, AZ (=Azerbaijan), BE, BG, BIH (=Bosnia), BZ (=Belarus), CH, CZ, DK, DE, EE, EL, ES, FI, FR, GE (=Georgia), HR, HU, IE, IT, LT, LU, LV, ME (=Crna Gora), NL, PL, PRC (=China), PT, RO, RS (=Serbia), RU (=Russia), SI, SK, SE, TR, UK

UIRR Consignment: corresponds to the transport capacity of one tractor-trailer combination on the road (equivalent to 2.0 EVP/TEU). A TEU (twenty-foot equivalent) is a unit of measurement corresponding to an ISO container of 20 feet in length (6.10m), used to express traffic capacities or flows, principally in the maritime transport sector.

Partners of UIRR



COMBIPASS

COMBIPASS is professional in the rental of intermodal loading units and mobile storage equipment. With more than 25 years of experience, COMBIPASS provides intermodal transporters and producers with a selection of quality equipment which meet constantly evolving demands and the latest norms whether for ADR, road, rail, barge or maritime transport.



DEN HARTOGH

DEN HARTOGH LOGISTICS is one of the leading Logistics Service Providers to convey safely bulk liquids and gases for the chemical industry. The company preferably develops smart logistics solutions based on intermodal routings with inland and railway journeys.



GATX RAIL EUROPE

GATX Rail Europe operates a fleet of more than 23,200 tank and freight wagons in Europe. The company is present in the most important railway markets in Europe. We do not follow market developments - we want always to be one step ahead. GATX operates two own plants for maintenance and construction of new freight wagons.



ERMEWA

ERMEWA is a European leader in rail wagon leasing with the aim of ensuring the success of a rail-based supply chain. The company offers a fleet of over 45,000 railcars, which includes a high number of specialised equipment for Combined Transport, to freight forwarders, CT Operators, railways and industrial companies.



HACON

HACON provides cutting-edge software solutions for public transportation, mobility and logistics. The consulting department assists its customers with projects in rail freight transport and Combined Transport in particular.



KRONE

KRONE is a leading global manufacturer of commercial road equipment for all types of goods. It is also specialised in the design of compatible loading units for the railway systems such as craneable semi-trailers for pocket wagons used in Combined Transport.



LIS

LIS AG is a leading company in Transport-Management-Software for logistics, forwarding agencies and shipping. The proposed solutions integrate all intermodal capabilities, especially all data and interfaces needed to improve the visibility of the railway system.



LOHR INDUSTRIE

LOHR is a private French group specialised in the design, manufacturing and marketing of goods transport systems, in particular the Modalohr railway freight solution for the transportation of standard semi-trailers on wagons.



MODALIS

MODALIS is known as a major actor in rental, trading and consulting in the intermodal sector. It is a specialized company in intermodal equipment rental such as loading units (containers for general cargo, gas and liquid tanks, dry bulk containers and chassis) and railway cars.



RAILWATCH

RailWatch is a German company specialised in providing solutions for the predictive maintenance of freight wagons using advanced sensor technology. RailWatch also designs and installs photogates at intermodal terminals.



SCHMITZ-CARGOBULL

SCHMITZ-CARGOBULL AG manufactures trailers and semi-trailers for commercial road vehicles. The Company offers an extensive range of equipment for all types of cargo and for all types of forwarding systems, in particular the design of intermodal loading units such as craneable trailers compatible with rail wagons.



UNIT45

UNIT45 concentrates its activities on the development, construction, financing and delivery of 45-foot containers meeting the specific requirements of the client. The 45-foot container concept is considered to be the most efficient solution in European intermodal logistics.



VTG RAIL EUROPE

VTG is the largest private wagon leasing company in Europe with 80,000 freight wagons made up of about 1,000 different wagon-types. A large portion of the VTG fleet are intermodal wagons designed for the transport of containers, swap bodies and craneable semi-trailers.



WECON

WECON is a specialist in commercial vehicles and container technology for the transportation of goods by road and rail. The company is one of the leading manufacturers of swap bodies and trailers for intermodal transport.



WIELTON

Wielton S.A. is one of the top three manufacturers of semi-trailers, trailers and car bodies in Europe and is among the top ten manufacturers in the industry. The Group has been developing its own technological ideas for years, optimising the production process, introducing technical innovations. In late 2016, Wielton also established a subsidiary in Côte d'Ivoire.

MoU Peers



ASSOFERR

ASSOFERR is the result of the merger of the two Associations ASSOCARRI and SUNFER on 27 November 2000, which until then represented the interests of the operators in the "private railway wagons" sector. Since 2002 ASSOFERR has also collected the inheritance of ASSOCOMBI.



ASSOLOGISTICA

Founded in 1947, Assologistica is the association of logistics companies, general warehouses and refrigerators, port terminal operators, intermodal terminals and airports in Italy. With the establishment of its territorial representatives and with the meeting between the logistics infrastructure managers and the third-party contractors who use them, Assologistica guarantees a 360° logistic integration.



BIC

The Bureau of International des Containers (BIC) was founded in 1933 as a neutral, non-profit, international organization whose mission is to promote the safe, secure and sustainable expansion of containerization and intermodal transportation. With a mission to promote the safe, secure and sustainable expansion of intermodal transportation, BIC enables professional dialogue amongst its members, standards bodies, governments and other industry organizations.



COMBINET

CombiNet was founded in 2007 by more than 30 companies from all sectors of combined transport in Austria: freight forwarders, freight forwarders, CT operators, terminals, ports, railway companies, manufacturers of handling equipment and equipment. The association's mission is to represent the interests of combined transport, strengthen networking between members, provide information to the media and the public and improve the conditions for CT.



ECTA

ECTA, the European Chemical Transport Association, speaks for the chemical transport industry to all its stakeholders and organises the Responsible Care Initiative for the European land transport industry. The association provides the chemical transport industry - including several intermodal shippers - with a voice at the EU level.



GNTC

Groupe National des Transport Combinés, GNTC, is the professional organization of Combined Transport stakeholders exploiting the technique of combined rail-road, river-road transport by swap bodies, containers and semi-trailers in France. The objectives of the GNTC are to defend the interests of its members and promote combined transport with the European Community, public authorities (both at national and regional level), transport, shippers and the general public



GROUPEMENT FER

Groupe ment Fer brings together Swiss freight forwarding and logistics companies with the common goal to handle the transport of goods between the North Sea and Mediterranean ports and Switzerland, as much as possible, by using the environmentally friendly railway mode which includes Combined Transport in particular.



IANA

The Intermodal Association of North America, IANA, is the only organization that represents the combined interests of the intermodal freight transportation industry in North America. IANA promotes the benefits of intermodal freight transportation and educates industry stakeholders, provides a neutral forum for discussion and positively influences the legislative and regulatory environment.



IBS

The International Rail Freight Business Association (IBS) aims to create framework conditions that will promote the position of companies interested in rail freight, including Combined Transport, and to improve the competitive conditions of rail freight in Europe. Promoting and improving the capacity of railways, standardization and simplification of its legal and business foundations, bundling of users of European rail freight traffic.



KNV

KNV, The Royal Dutch Transport Federation (Koninklijk Nederlands Vervoer) is the Dutch umbrella organization for professional passenger transport and rail freight in the Netherlands. KNV Rail Freight Transport promotes the use of more rail freight, including Combined Transport, in order to make Dutch transport and logistics more sustainable and safe.



MLSZKSZ

The Association of Hungarian Logistics Service Centres (MLSZKSZ) is one of the most significant associations of logistics and transport in Hungary, connecting almost 90% of the logistics service centres in the country. As opposed to other organisations which only deal with certain segments of logistics, MLSZKSZ is the only association in Hungary that represents all aspects of the service chain, including numerous intermodal stakeholders.



RFG

RFGB is the representative body for rail freight in the UK. Membership includes rail freight operators, logistics companies, ports, equipment suppliers, property developers and support services, as well as retailers, construction companies and other customers, who share the mission to increase the volume of goods moved by rail.



SGKV

Since 1928 the Studiengesellschaft für den Kombinierten Verkehr e.V. (SGKV) roughly translated as German Promotion Centre for Intermodal Transport, is active on behalf of the interests of intermodal transport chains. The association aims at strengthening and to developing Combined Transport further through bringing together research and practice.



USER

USER is a professional organization founded in 1993 that brings together companies with activities covering all modes of transport and related services, including logistics operators and customs brokers. The objectives are to safeguard the economic, financial and technical aspects of their member companies to promote cooperation between its members, between the same profile or similar associations in the country and abroad, building and strengthening the solid reputation of industry shipments

Performance

Statistics 2018



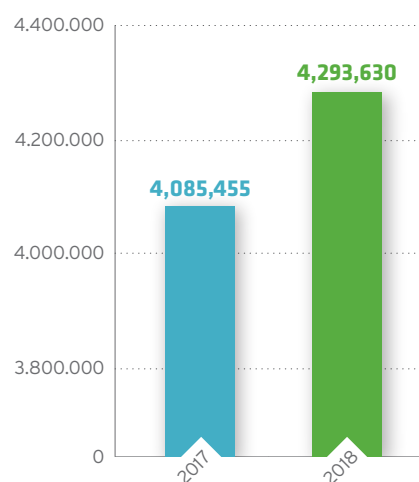


Summary

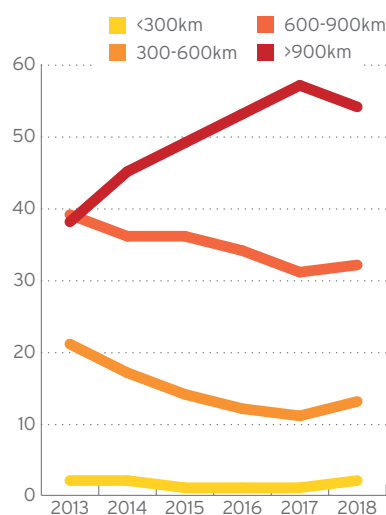
European Combined Transport closed a year of decisive growth in 2018: the total number of consignments transported by UIRR operator members increased by +4.97%, whereas output when expressed in tonne-kilometres grew by +0.78%. Cross-border services have expanded substantially by +5.27% with a continuous significant transfer of semi-trailers (+10.23%) and containers (+5.19%), while domestic relations grew by +4.30% thanks to the further expansion of semi-trailers with a positive result of 11.30% and an increase of the transport of containers with 5.88%. Rolling Motorway transport (of full trucks) suffered across-the-board with -7.37% decrease on both domestic- and cross-border relations in 2018.

	Cross-border			Domestic			Total		
	2017	2018	2018/2017	2017	2018	2018/2017	2017	2018	2018/2017
Number of consignments	2,801,377	2,954,366	5.27%	1,284,079	1,339,265	4.30%	4,085,455	4,288,344	4.97%
containers	2,266,447	2,384,153	5.19%	1,055,726	1,117,836	5.88%	3,322,172	3,501,988	5.41%
(craneable) semi-trailers	372,826	410,952	10.23%	73,453	81,755	11.30%	446,279	492,707	10.40%
complete trucks (RoLa)	162,104	153,975	-5.01%	154,900	139,674	-9.83%	317,004	293,649	-7.37%
Average distance	1,062	1,020	-4.00%	413	406	-1.54%	871	841	-3.37%
Billion tkm	64.69	65.11	0.63%	10.50	10.67	1.70%	75.12	75.71	0.78%
Number of TEU	5,602,753	5,908,731	5.27%	2,568,157	2,678,529	4.30%	8,170,910	8,576,688	4.97%

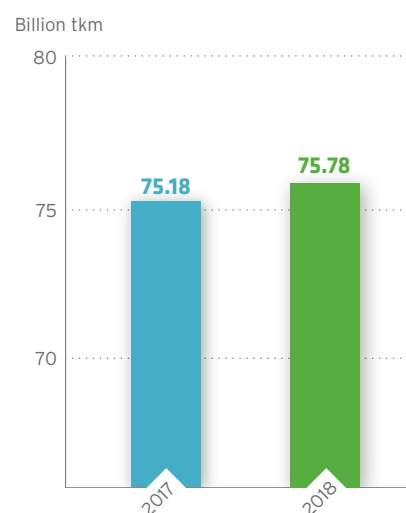
Consignments 2017-2018



Distance Matrix



Tonne-kilometres 2017-2018



Evolution of Combined Transport Traffic

1990 - 2018

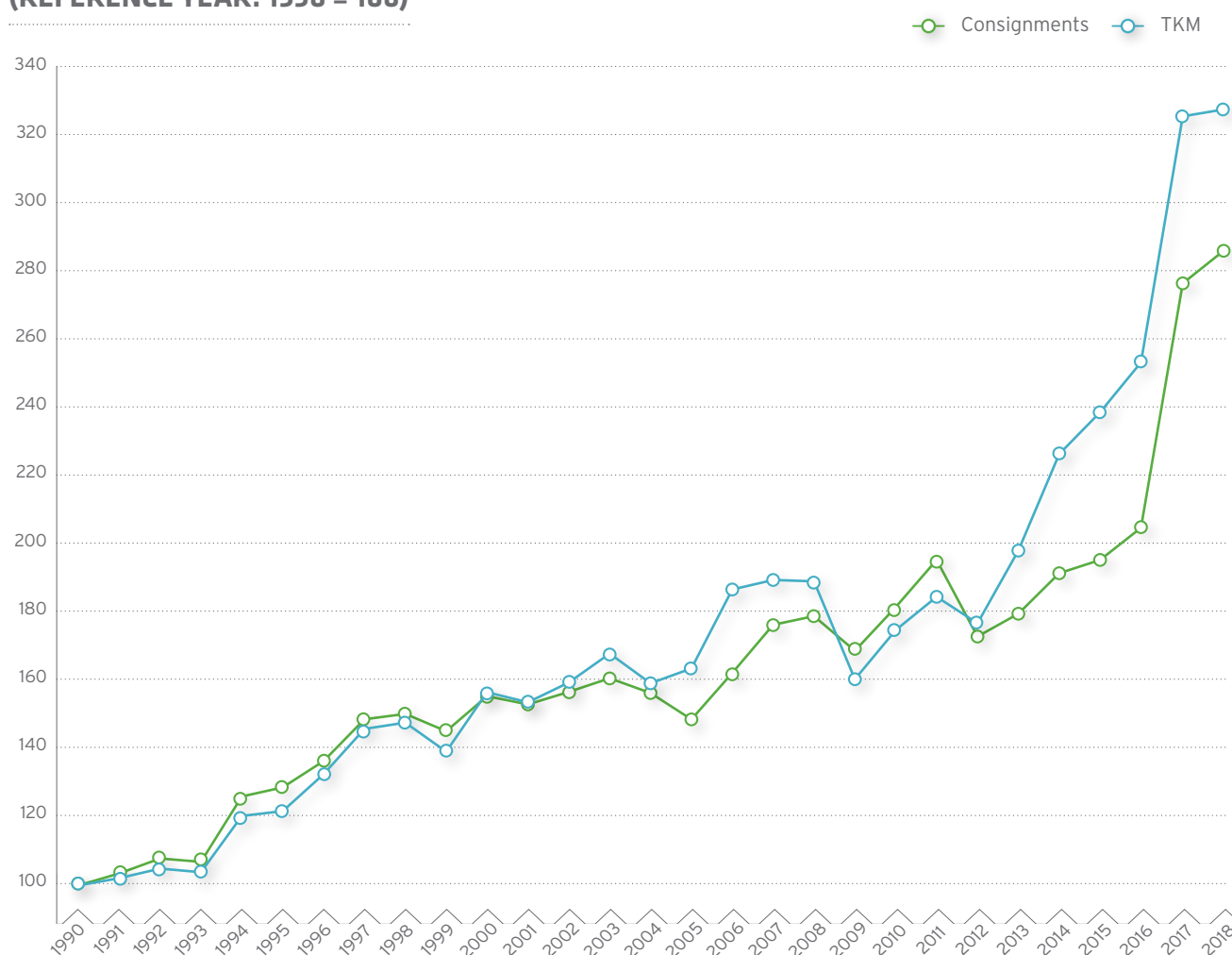
COMBINED TRANSPORT								
	1990	1995	2000	2005	2006	2007	2008	2009
Number of consignments	1,183,361	1,615,364	1,967,072	2,457,579	2,717,751	2,952,543	2,994,625	2,818,349
swap bodies and containers	727,275	1,078,979	1,334,377	1,977,630	2,135,976	2,341,690	2,318,990	2,182,569
(craneable) semi-trailers	241,816	224,029	172,275	164,269	199,800	220,970	246,690	219,800
complete trucks (RoLa)	214,270	312,356	460,420	315,680	381,975	389,883	428,945	415,980
Total billion tkm	18.68	24.97	35.18	38.84	45.39	46.07	45.97	38.90
< 300km	1%	2%	2%	3%	3%	3%	3%	4%
300 km - 600 km	35%	37%	28%	11%	12%	15%	17%	16%
600 km - 900 km	33%	19%	43%	52%	41%	41%	35%	36%
> 900 km	31%	42%	27%	34%	44%	41%	45%	44%

⁽¹⁾ Data without Ökombi - Hungarokombi (RoLa operators) | ⁽²⁾ From 2013 figures include traffic of new members TEL and FELB

⁽³⁾ From 2015 figures include RCO CZ | ⁽⁴⁾ From 2016 figures with RCO HU

UIRR CT Growth Index - Consignments and Tonne-Kilometres

(REFERENCE YEAR: 1990 = 100)



The **UIRR CT Growth Index (Consignments and Tonne-Kilometres)** is a time series of year-on-year growth rates of the number of consignments transported and the tonne-kilometres realised by UIRR members over the years, which has been neutralised of membership effects (of companies joining or leaving the association); hence the growth rate of only those members were taken into account in one year that were able to provide data for the previous year as well. It is assumed that prevailing UIRR membership in any year since 1990 has been representative of the trends of the entire European CT sector.

2010	2011	2012 ⁽¹⁾	2013 ⁽²⁾	2014 ⁽³⁾	2015 ⁽³⁾	2016 ⁽⁴⁾	2017 ⁽⁵⁾	2018	% 18/17
3,030,865	3,075,808	2,529,264	2,645,950	2,819,606	2,876,585	3,014,344	4,085,455	4,288,344	4.97%
2,281,746	2,330,918	2,067,488	2,134,004	2,302,831	2,348,762	2,409,070	3,322,172	3,501,988	5.41%
300,867	318,567	333,597	375,432	362,654	382,250	470,535	446,279	492,707	10.40%
448,252	426,323	128,179*	136,514	154,121	145,573	134,739	317,004	293,649	-7.37%
42.37	42.58	39.08	40.74	52.17	54.98	58.32	75.12	75.71	0.78%
5%	7%	3%	2%	2%	1%	1%	1%	2%	↑
16%	12%	12%	21%	17%	14%	12%	11%	13%	↑
42%	44%	47%	39%	36%	36%	34%	31%	32%	↑
37%	37%	38%	38%	45%	49%	53%	57%	54%	↓

⁽⁵⁾ From 2017 figures include Amber Rail, Baltic Rail and Lugo; the 2017 transport volume reported a year earlier has been restated to reflect the full volumes of Metrans and RCO

Analysis

Overall: The UIRR CT Growth Index shows - see graph on p.34 - that Combined Transport performance has more than doubled in terms of consignments, whereas the growth rate when measured in tonne-kilometres was nearly three-fold. Development has been unabated, despite disturbances (i) 1998-1999 (size-increase of trucks permitted in Directive 96/53, appearance of cheaper East European drivers and road cabotage liberalization result in a substantial price drop of freight rates), (ii) 2003-2005 (EU enlargement results in the entry of East European road hauliers into the market, some of whom built business models on the ineffective enforcement of cabotage rules, which resulted in a second major drop in freight rates), (iii) 2009-2013 (the double dips of the global financial and European economic crisis), (iv) 2013-2016 (heavier and longer cross-border transports, the sluggish recovery of the European economy and the continuous extension of a European intercontinental CT network impacted the trend, which brought with it the substantial extension of the average non-road distance of Combined Transport - a loss of competitiveness over shorter distances).

By type of loading unit: The transport of complete trucks, or RoLa (accompanied Combined Transport) represents 6% of the UIRR transported volume (overall decline of 7% in 2018), while the proportion of consignments based on (craneable) semi-trailers stabilized at about 14% by 2018 (overall increase by 50,000 consignments). With the integration of new actors active in the hinterland transport of maritime containers, the proportion of the various types of containers and swap bodies remain unchanged with about 82% of all UIRR consignments (growth of 210,000 consignments in 2018).

Prominent CT-relations: The most important routes of unaccompanied Combined Transport are the ones connecting the Northwest Europe with South Europe (transalpine corridors with more than 50% of the total volume). RoLa is focused on Transalpine routes. Dynamic traffic development continues on East-West relations, and even more within

the Eastern countries and along the intercontinental routes towards China, Russia and Turkey (representing about 5% of the UIRR traffic).

Details of 2018: The UIRR member CT operators realized a traffic increase on cross-border relations (+5.27%) as well as on domestic routes (+4.30%). Unaccompanied Combined Transport (UCT) based on containers and swap bodies increased its share in 2018 (+5.41%) on both cross-border and domestic relations with respectively +5.19% and +5.88%, while the use of semi-trailers grew by 10.40% over the year. The carriage of complete trucks (RoLa or accompanied CT) closed the year with an overall negative result of 7.37%.

The best performing relations in relative terms during 2018 were:

- Austria vv Italy +295% (45,000 consignments)
- Hungary vv Italy +566% (31,000 consignments)
- Germany vv Slovenia +311% (11,000 consignments)

The best performing relations in absolute terms during 2018 were:

- Germany vv Italy +58,000 consignments (9%)
- Belgium vv Italy +44,000 consignments (+19%)
- Austria vv Germany +35,000 consignments (+56%)

New relations have integrated the UIRR CT network:

- Czech Republic vv Russia 56,000 consignments
- Hungary vv Turkey 16,000 consignments
- Greece vv Hungary 5,000 consignments

Declines have been recorded on the following relations:

- Netherlands vv Italy -17% (-22,000 consignments)
- Belgium vv Spain -36% (-16,000 consignments)
- Hungary vv Slovenia -21% (-12,000 consignments)

General Considerations

A UIRR consignment corresponds to the transport capacity of one full size truck on road (equivalent to 2 TEU), meaning:

- one semi-trailer;
- two swap bodies less than 8.30 m and under 16t;
- one swap body more than 8.30 m or over 16t;
- one vehicle on the Rolling Motorway (RoLa).

The UIRR statistics include only the rail section of the Road-Rail Combined Transport chain (terminal to terminal).

Abbreviations

C	consignments
CT	Combined Transport
RoLa	rolling motorway
SB	swap body
ST	semi-trailer
t	tonnes
TEU	twenty-foot equivalent unit
tkm	tonne-kilometre

Country Matrix (excluding pre- and post haulage by road)

Relations from to		Consignments C	Consignments-km S*km	Average Distance	Average Weight t/C	Gross Weight t	Tonne-km	Techniques, % consignments			
								ST	SB/CT	SB/CT	RoMo
Country							1,000 tkm		<8,30m	>8,30m	
AT	BE	2,247	2,579,665	1,148	15	33,153	37,972		20%	80%	
BE	AT	2,892	3,388,788	2,397	45	72,059	84,392		28%	72%	
AT	CH	8,475	4,915,500	580	15	127,125	73,733		50%	50%	
CH	AT	8,456	4,904,480	580	15	126,840	73,567		50%	50%	
AT	DE	52,351	52,428,564	1,001	21	1,084,598	1,098,531	11%	33%	56%	
DE	AT	45,328	44,188,257	975	21	950,062	921,361	12%	37%	51%	
AT	ES	6	11,370	1,895	31	185	351			100%	
AT	FR	120	240,000	2,000	29	3512	7024			100%	
FR	AT	10	20,000	2,000	16	163	326			100%	
AT	HU	2,384	1,084,720	455	15	35,760	16,271		50%	50%	
HU	AT	6,200	2,080,540	336	15	93,000	31,208		50%	50%	
AT	IT	26,916	10,459,022	389	27	721,715	279,992	10%	12%	16%	62%
IT	AT	34,546	11,704,546	339	23	795,710	286,556	7%	20%	24%	49%
AT	NL	3,307	3,370,412	1,019	17	54,741	56,438	1%	47%	52%	
NL	AT	6,704	6,343,207	946	16	107,729	104,295	1%	49%	50%	
AT	RO	1	1,270	1,270	28	28	36		100%		
RO	AT	2	2,217	1,478	8	11	17		100%		
AT	RS	1,628	742,368	456	19	31,461	14,346		6%	94%	
RS	AT	1,690	770,640	456	33	55,770	25,431		13%	87%	
AT	SI	33,126	9,958,856	301	27	883,813	274,948		55%	10%	35%
SI	AT	21,489	6,403,161	298	30	638,252	201,864		36%	10%	54%
AT	SK	88	23,320	265	15	1320	350		50%	50%	
TR	AT	31	88,128	2,889	14	437	1,261		71%	29%	
BE	BG	49	125,386	2,559	29	1,414	3,617		100%		
BG	BE	15	36,365	2,508	7	97	243		100%		
BE	CH	17,785	12,801,340	720	22	386,870	277,578		67%	33%	
CH	BE	17,196	12,395,264	721	14	240,543	173,855		55%	45%	
BE	CN	10	81,318	8,132	27	273	2,218			100%	
BE	CZ	442	430,021	974	13	5,625	5,478		52%	48%	
CZ	BE	455	443,170	974	26	11,762	11,456		76%	24%	
BE	DE	14,322	8,968,792	626	24	344,076	215,840		62%	38%	
DE	BE	15,865	11,062,808	697	19	297,292	207,153		64%	36%	
BE	ES	15,216	22,525,730	1,480	28	424,242	628,062		62%	38%	
ES	BE	12,581	20,193,439	1,605	21	263,447	424,663		66%	34%	
BE	FR	23,929	16,203,344	677	20	480,570	353,684		42%	58%	
FR	BE	21,452	14,640,577	682	20	428,128	292,738		37%	63%	
BE	IR	1	5,852	5,852	7	7	41		100%		
BE	IT	141,299	158,158,785	1,119	26	3,705,561	4,135,796	19%	26%	55%	
IT	BE	133,115	155,487,930	1,168	23	3,003,658	3,506,834	20%	22%	58%	
BE	KZ	43	228,983	5,325	28	1,217	6,478		100%		
KZ	BE	12	70,680	5,890	8	90	532		100%		
BE	LT	1	2,642	2,642	11	11	30		100%		
BE	LU	18,010	5,852,876	325	19	341,630	110,760	2%	68%	30%	
LU	BE	15,016	4,891,680	326	13	197,777	66,540	3%	59%	38%	
BE	NL	253	43,803	173	16	4,150	722		71%	29%	
NL	BE	643	76,556	119	28	17,902	2,137		73%	27%	
BE	PL	5,055	5,838,439	1,155	28	143,201	165,411		54%	46%	
PL	BE	3,782	4,931,781	1,304	10	39,534	51,553		56%	44%	
BE	RO	12,864	21,778,005	1,693	24	308,763	522,651	12%	14%	74%	
RO	BE	11,656	19,815,199	1,700	20	231,878	391,986	11%	4%	85%	
BE	RU	450	1,069,557	2,377	31	13,933	3,317		95%	5%	
RU	BE	303	670,318	2,212	16	4,995	11,051		97%	3%	
BE	SE	2,081	1,986,878	955	26	55,013	52,538	12%	47%	41%	
SE	BE	1,104	1,053,843	955	10	10,588	10,112	6%	27%	67%	
BE	SK	277	357,238	1,292	28	7,840	10,129		99%	1%	
SK	BE	91	116,280	1,292	8	712	915		96%	4%	
BE	UZ	4	21,284	5,321	28	112	594		100%		
UZ	BE	3	17,424	5,808	8	23	134		100%		
BG	DE	7	16,341	2,514	8	49	124		75%	25%	
DE	BG	18	37,161	2,065	29	517	1,067		65%	35%	
CH	DE	21,702	13,430,193	619	15	322,987	202,060	26%	46%	28%	
DE	CH	34,321	21,806,060	1,872	78	876,454	554,744	18%	58%	24%	
CH	DK	19	22,287	1,173	25	483	567		100%		
DK	CH	33	38,709	1,173	7	242	284		100%		
CH	ES	143	256,448	1,800	27	3,838	6,908		99%	1%	
CH	FR	18	20,988	1,166	19	348	405		100%		
CH	IT	903	267,221	296	13	11,771	3,485		54%	46%	
IT	CH	1,892	549,850	291	25	46,870	13,621		55%	45%	
CH	NL	8,258	7,546,586	914	20	165,623	151,364	1%	67%	32%	
NL	CH	8,393	7,439,414	886	19	162,555	144,086		62%	38%	
CH	NO	43	77,314	1,798	30	1,306	2,348	100%			
NO	CH	12	21,576	1,798	20	237	427	67%	33%		
CH	SE	6	6,822	1,137	29	172	195	100%			
SE	CH	3	4,212	1,404	27	82	115		100%		
CN	DE	19,360	204,584,500	10,568	21	397,280	4,224,892		9%	91%	
DE	CN	21,124	224,921,959	10,648	21	433,718	4,663,088		10%	90%	
CN	RU	3	23,118	7,706	11	34	259		100%		
RU	CN	10	78,530	7,853	28	283	2,220		100%		
CZ	IT	5,052	3,879,936	768	15	75,780	58,199		50%	50%	
IT	CZ	4,944	3,796,992	768	15	74,610	56,955		50%	50%	
CZ	PL	1,331	918,390	690	15	19,965	13,776		50%	50%	
PL	CZ	1,330	917,700	690	15	19,950	13,766		50%	50%	
CZ	RU	9,744	8,282,400	850	15	146,160	124,236		50%	50%	
RU	CZ	9,744	8,282,400	850	15	146,160	124,236		50%	50%	
CZ	SI	6,003	5,129,023	854	14	83,220	71,104		100%		
SI	CZ	5,922	5,061,297	855	13	79,757	68,166		100%		
CZ	DE	26,552	21,089,917	794	16	417,980	329,213	15%	50%	35%	
DE	CZ	27,343	21,943,209	803	19	520,968	405,570	19%	43%	38%	
CZ	SK	7	2,730	390	20	137	53		100%		
DE	BY	1	1,805	1,805	23	23	41		38%	62%	
DE	DK	2,773	3,048,098	1,099	36	98,758	108,760	12%	42%	46%	
DK	DE	1,869	1,282,095	686	7	12,399	8,755	9%	23%	68%	
DE	ES	19,301	29,082,604	1,507	26	496,050	746,368		81%	19%	
ES	DE	21,591	29,411,192	1,362	18	388,679	529,483		95%	5%	
DE	FR	16,497	14,610,745	886	20	325,191	314,488		58%	42%	
FR	DE	14,737	12,934,679	878	21	311,862	262,637	1%	54%	45%	
DE	GR	707	1,717,117	2,429	30	21,309	51,755	2%	89%	9%	
GR	DE	310	761,086	2,455	9	2,900	7,119	1%	95%	4%	
DE	HR	475	950	950	8	4	4		100%		
HR	DE	4	3,748	937	7	29	27		100%		
DE	HU	5,505	6,308,489	1,146	17	93,250	106,688		52%	48%	
HU	DE	15,123	19,006,877	1,257	18	277,527	350,789		71%	29%	
DE	IT	408,256	335,617,902	822	27</						

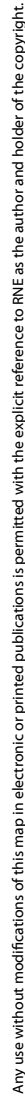
Relations		Consignments C	Consignments-km S*km	Average Distance	Average Weight t/C	Gross Weight t	Tonne-km	Techniques, % consignments			
from	to							ST	SB/CT	SB/CT	RoMo
Country									<8,30m	>8,30m	
DE	RU	3,738	10,703,086	2,864	16	61,392	177,464		42%	58%	
RU	DE	3,709	10,607,901	2,860	16	61,120	172,583		31%	69%	
DE	SE	30,555	29,691,329	972	25	768,028	746,484	62%	17%	21%	
SE	DE	26,829	26,630,617	993	21	571,671	566,825	64%	16%	20%	
DE	SI	7,924	7,702,798	972	20	158,749	148,954		58%	42%	
SI	DE	7,191	6,939,424	965	13	95,132	94,446		63%	37%	
DE	SK	1,170	1,290,428	1,103	20	23,862	31,844		57%	43%	
SK	DE	1,022	981,368	961	15	15,142	14,471		51%	49%	
DE	TR	6,761	16,958,648	2,508	22	150,392	400,476		70%	30%	
TR	DE	5,121	12,132,988	2,369	13	64,558	145,100		67%	33%	
DE	UZ	5	23,045	4,609	26	132	607		100%		
UZ	DE	1	4,438	4,438	8	8	34		100%		
DK	IT	4,767	5,535,083	1,161	29	136,945	159,010		100%		
IT	DK	4,573	6,508,950	2,887	57	121,700	173,266		97%	3%	
ES	IT	1,933	2,150,122	1,112	27	52,393	58,278		80%	20%	
IT	ES	1,318	1,487,999	1,129	21	27,769	31,351		100%		
ES	NL	352	621,608	1,766	12	4,144	7,095				
NL	ES	920	1,891,861	2,056	29	26,423	54,567		75%	25%	
ES	PL	48	116,016	2,417	29	1,391	3,363			100%	
PL	ES	25	57,599	2,304	28	690	1,589		24%	76%	
ES	RO	32	108,640	3,395	29	914	3,103	9%	91%		
ES	RU	3	6,751	2,700	26	66	178		75%	25%	
RU	ES	2	4,134	2,067	30	59	123		97%	3%	
ES	SE	3	6,166	2,055	27	81	168		67%	33%	
SE	ES	3	5,983	1,994	27	82	164		67%	33%	
FR	IT	29,662	26,839,609	1,812	27	805,987	729,715	2%	54%	44%	
IT	FR	30,325	27,934,910	921	18	559,837	519,813	2%	54%	44%	
FR	LU	9,301	3,269,637	352	17	156,132	47,343	35%	35%	30%	
LU	FR	10,509	3,803,077	362	24	252,738	98,020	31%	41%	28%	
FR	NL	2,028	2,536,669	1,251	15	31,233	39,544		80%	20%	
NL	FR	1,593	1,959,982	1,230	25	40,304	49,862		57%	43%	
FR	PL	69	94,328	1,367	31	2,130	2,912		100%		
PL	FR	30	47,495	1,610	4	117	188		100%		
GR	CZ	4,429	2,878,850	650	15	66,435	43,183		50%	50%	
GR	HU	4,174	7,095,800	1,700	15	62,610	106,437		50%	50%	
HU	GR	3,786	6,436,200	1,700	15	56,790	96,543		50%	50%	
HR	HU	5,034	3,021,060	600	8	37,854	23,099		63%	37%	
HU	HR	5,657	3,388,630	599	7	36,785	22,468		48%	52%	
HR	RS	604	362,400	600	13	7,852	4,711		42%	58%	
RS	HR	719	431,400	600	14	10,369	6,040		38%	62%	
HR	SI	866	208,509	241	10	8,929	2,346		71%	29%	
SI	HR	220	16,405	75	15	3,278	244		100%		
HU	BE	1	1,296	2,592	7	3	9		79%	21%	
HU	IT	19,630	11,292,289	575	15	287,820	166,132		50%	50%	
IT	HU	16,882	9,697,744	574	15	257,363	148,074		50%	50%	
HU	NL	1,107	1,801,104	1,628	21	23,548	38,650		74%	26%	
NL	HU	2,128	2,971,525	1,397	23	48,506	67,704		61%	39%	
HU	RO	916	596,413	651	21	19,022	9,334	13%	28%	59%	
RO	HU	1,245	844,167	678	12	15,245	11,843	3%	37%	60%	
HU	RS	7	2,471	353	29	205	72		100%		
RS	HU	2	1,059	706	8	12	8		100%		
HU	RU	3	7,035	2,345	23	69	162		78%	22%	
RU	HU	7	12,846	1,976	13	86	163		62%	38%	
HU	SI	11,893	7,872,474	662	14	170,196	112,489		96%	4%	
SI	HU	34,284	20,023,334	584	15	513,213	299,628		81%	19%	
HU	SK	10,010	2,652,650	265	15	150150	39790		50%	50%	
SK	HU	4,642	1,202,650	259	15	69,630	18,040		50%	50%	
HU	TR	7,979	9,574,800	1,200	15	119685	143622		50%	50%	
TR	HU	8,144	9,772,800	1,200	15	122160	146592		50%	50%	
IR	PL	1	3,947	3,947	7	7	28		100%		
IT	BY	135	83,920	624	20	2,685	1,675		38%	62%	
IT	CN	2	22,122	11,061	23	47	517		100%		
LU	IT	8,704	10,671,104	1,226	19	162796	199588	98%	2%	2%	
LU	IT	8,461	10,373,186	1,226	24	202,831	248,671	98%	2%	2%	
IT	NL	51,047	63,280,560	1,240	23	1,185,434	1,468,452	20%	31%	49%	
NL	IT	53,883	54,804,972	1,017	26	1,401,964	1,422,284	12%	35%	53%	
IT	PL	207	382,545	1,848	28	5,711	10,555		2%	98%	
PL	IT	19	39,549	2,082	25	477	993		7%	93%	
IT	RO	3,009	3,830,144	1,273	26	78762	100256			100%	
RO	IT	3,117	3,972,050	1,274	11	33212	42323			100%	
IT	SE	5,346	9,786,154	1,831	27	145,252	266,151	48%	27%	25%	
SE	IT	5,348	8,471,265	1,584	30	159,240	253,951	52%	28%	20%	
IT	TR	1,257	2,322,779	1,848	28	35821	66193		17%	83%	
TR	IT	1,286	2,777,292	2,160	5	6474	13981		4%	96%	
KZ	NL	1	1,875	3,750	8	4	15		100%		
NL	KZ	1	3,321	3,321	28	28	92		100%		
KZ	PL	20	88,561	4,428	8	155	685		100%		
PL	KZ	20	87,272	4,364	28	565	2,466		100%		
MK	RS	2,462	2,090,238	849	26	64677	54911		4%	96%	
RS	MK	2,742	2,327,958	849	22	59,118	50,191		2%	98%	
NL	BG	8	11,816	1,477	26	205	303		64%	36%	
NL	PL	530	668,860	1,262	16	8243	10403		64%	36%	
PL	NL	234	336,294	1,437	8	1866	2682		56%	44%	
NL	RO	628	845,288	1,346	27	17126	23052		64%	36%	
RO	NL	53	57,902	1,092	8	420	459			100%	
NL	RS	128	168,576	1,317	29	3,693	4,863		100%		
RS	NL	5	8,530	1,706	8	39	66		100%		
NL	RU	145	307,255	2,119	31	4549	9640		100%		
RU	NL	160	497,131	3,107	9	1429	4439		97%	3%	
NL	SE	1	1,046	1,046	31	31	32		100%		
SE	NL	24	21,600	900	30	720	648		100%		
NL	TU	2	4,434	2,217	27	54	120		75%	25%	
NO	IT	19	29,840	1,613	29	534	862		80%	20%	
PL	RU	180	636,090	3,534	28	4,963	17,538		100%		
RU	PL	88	307,177	3,491	8	666	2,325		97%	3%	
PL	SE	9	14,490	1,610	4	36	57		58%	42%	
PL	SE	18	32,490	1,805	31	557	10,05		58%	42%	
PL	SI	2,600	2,633,800	1,013	15	390000	39507		5%	95%	
SI	PL	3,880	3,930,440	1,013	20	77600	78609		5%	95%	
PL	TR	235	493,500	2,100	15	3525	7403		50%	50%	
TR	PL	328	688,800	2,100	15	4,920	10,332		50%	50%	
RS	SI	159	84,976	534	3	544	291		100%		
SI	RS	200	86,320	432	20	3,914	1,689		100%		
RU	IT	53	103,515	1,953	30	1569	3064		97%	3%	
RU	SK	17,974	35,049,300	1,950	15	269610	525740		50%	50%	
SK	RU	21,460	41,847,000	1,950	15	321900	627705		50%	50%	
SE	DK	1	591	591	30	30	18		100%		
SI	IT	365	96,572	265	3	1,109	293		100%		
SI	SK	14,748	11,768,167	798	13	186031	148444		100%		
SK	SI	11,084	9,079,791	819	7	82354	67463		100%		
UZ	NL	3	20,424	6,808	8	23	155		100%		
TOTAL		2.451.080	2.588.518.636	1.056	22	54.122.332	56.391.587	17%	39%	38%	6%

Note: The total figure does not reflect the cross-border volumes of Metrans

Terminals

TRANSHIPMENT TERMINALS MANAGED BY UIRR MEMBER COMPANIES

	List of terminals under own management		Type of connection			Total turnover (departing + arriving)	Technical data			Nearest railway station (entry point to the rail network)	Located on which European Rail Freight Corridor(s)
	Name	City	UCT Rail	IWW	RoLa		Total surface (m²)	Cranes (gantry + mobile)	Number of tracks		
	Brennersee ROLA	Gries/Brenner			•	132,768	5,000	-	2	Brennersee	3
	CTE	Enns	•			375,000	175,000	3	8	Enns HBF	2
	CTS	Salzburg	•			245,000	120,000	2	10	Salzburg HBF	2
	Salzburg Hbf ROLA	Salzburg			•	3,577	5,000	-	2	Salzburg Hbf	9, 10
	St. Michael CCT	St. Michael	•			13,837	15,000	3	2	St. Michael	5, 10
	Terminal Krems an der Donau	Krems	•	•			35,000	5	4	Krems an der Donau	9
	Villach Süd CCT/ROLA	Villach	•		•	35,422	70,000	4	6	Villach Süd	5, 10
	Wels Vbf CCT/ROLA	Wels	•		•	202,833	120,000	6	9	Wels Vbf	9, 10
	Wien Süd CCT	Vienna	•			161,673	250,000	4	4	Wien Zentralverschiebebf	5, 7, 9
	Wolfurt CCT	Wolfurt	•			114,138	106,000	6	4	Wolfurt	9
	Wörgl ROLA	Wörgl			•	143,157	40,000	-	3	Wörgl	3
	Athus Container Terminal	Athus	•			N/A	160,000	8	12	Athus	2
	Cirkeldijk	Antwerp	•			24,441	52,000	4	4	Antwerp Berendrecht	1, 2, 8
	Combinant	Antwerp	•			138,500	99,000	4	5	Combinant (BASF)	1, 2, 8
	Euroterminal	Genk	•			16,913	80,000	3	4	Genk Goederen	1, 2, 8
	HTA	Antwerp	•			87,922	53,000	3	5	Antwerpen	1, 2
	Main Hub	Antwerp	•			106,176	202,497	6	8	Antwerp North	1, 2, 8
	Aarau	Aarau	•			49,240	27,000	3	5	Aarau	2
	Basel	Basel	•			37,879	17,000	3	2	Basel	2
	Z 4	Chiasso	•			8,276	7,000	1	1	Chiasso	1
	KTL	Ludwigshafen	•			354,414	305,000	8	13	Ludwigshafen-Oggersheim	1, 4
	TSG	Singen	•			76,808	63,000	3	4	Singen	1
	Avignon Courtine	Avignon	•			83,769	85,296	6	10	Avignon Champfleury	2, 3
	CEF	Mouguerre	•			31,223	35,000	4	4	Bayonne	4
	CLESUD	Miramas	•			52,102	490,000	4	2	Miramas	
	Cognac	Cognac	•			8,110	6,478	2	3	Cognac	
	Gevrey	Dijon	•			15,198	15,000	2	4	Gevrey	
	Hourcade	Bordeaux	•			87,050	48,755	5	7	Hourcade	
	LDCT/DELTA3	Dourges	•	•	•	89,149	60,000	9	7	ITE Dourges	2
	Le Boulou	Le Boulou	•			N/A	90,000	4	8	Le Boulou	6
	Marseille	Marseille	•			68,661	41,363	6	6	Marseille	
	Mouguerre	Mouguerre	•			N/A	35,000	2	4	Bayonne	4
	Noisy	Noisy le Sec	•			16,834	70,000	4	10	Noisy le Sec	4
	Saint Jory	Toulouse	•			11,763	52,595	4	4	Saint Jory	
	Valenton	Bonneuil sur Marne	•			71,961	132,000	5	7	Valenton	4
	Vénissieux	Lyon	•			98,332	46,100	9	4	Vénissieux	2, 6
	Rail Cargo Terminal-BILK	Budapest	•			N/A	223,000	7	7	Budapest	6,7
	Railhub Terminal Budapest	Budapest	•	•			140,000	7	8	Budapest Soroksar ut rendozo	6, 7, 11
	Candiolo	Candiolo	•			10,121	100,000	2	5	Candiolo	
	EMT	Trieste	•	•			80,000	4	4	Trieste Campo Marzio	5, 6
	Gallarate	Gallarate	•			33,759	100,000	2	3	Gallarate	1
	Giovinazzo Terminal	Giovinazzo	•			14,073	30,000	2	4	Giovinazzo	5
	Lugo Terminal	Lugo	•			6,338	190,000	3	8	Lugo	5
	Piacenza	Piacenza	•			107,541	55,000	5	3	Piacenza	5
	TBG	Busto/Gallarate	•			449,881	243,000	12	18	Gallarate	1
	Katowice Wlosienica	Katowice	•			539	12,000	-	2	Dwory Monowice	5
	Railhub Terminal Gadki	Poznan	•				320,000	6	4	Gadki station	8
	Terminal Dąbrowa Górnicza	Dąbrowa Górnicza	•				225,000	4	4	Dąbrowa Gornicza Towarowa	5, 8, 11
	Terminal Katy Wroclawskie	Wroclaw	•				45,000	4	2	Wroclaw station	5, 8
	Terminal Kontenerowy Pruszków	Warszawa	•				33,000	4	3	Pruszkow station	8, 11
	Wroclaw Siechnice	Wroclaw	•			5,839	15,000	0	2	Siechnice	5
	Bucharest Sud	Bucharest	•				20,000	3	3	Bucharest Sud	
	Cluj Napoca	Cluj Napoca	•							Cluj Napoca Est	
	Railport Arad	Curtici	•			69,830	8,000	5	7	Curtici	6
	Daventry	Daventry	•			42,240	12,000	2	2	Rugby	2
	Bratislava UNS	Bratislava	•			22,778	45,442	3	3	UNS Bratislava	5, 6
	Rail Hub Terminal Dunajska Streda	Dunajska Streda	•				280,000	13	9	Dunajska Streda	5, 7, 9, 11
	Terminal Kosice	Kosice	•				25,000	5	2	Haniska pri Kosciach	9, 11
	Terminal Zilina - operated by TIP Zilina	Zilina	•				151,854	5	2	Zilina	5, 9, 11
	Žilina	Žilina	•			23,780	24,985	3	5	ZS Teplička	5, 9
	Mělník Labe	Mělník	•			86,777	17,252	4	1	Mělník	2
	Horní Moštěnice	Horní Moštěnice	•			15,784	16,000	2	4	Přerov	2
	Rail Hub Ceska Trebova	Ceska Trebova	•				138,000	7	6	Ceska Trebova	7, 9
	Rail Hub Terminal Prague-Uhrineves	Prague	•				420,000	14	15	Praha-Uhrineves	7, 8, 9
	Terminal Ostrava - Senov	Ostrava	•				100,000	10	2	Havirov	5, 9
	Terminal Plzen - Nyrany	Plzen	•				50,000	4	3	Nyrany	9
	Terminal Zlin - Zelechovice/Lipa	Zlin	•				68,600	8	8	Zelechovice nad Drevnici	5, 7, 9
	Trimodal Terminal Usti Nad Labem	Usti Nad Labem	•	•			25,000	5	3	Usti nad Labem sever	7, 8



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