



## Combined Transport growth is stalling

The good news of the Fréjus line reopening was tarnished by extreme weather, flooding and works-related disruptions throughout the European railway network, bringing the fragile recovery of Combined Transport volumes to a halt during the second quarter of 2025. Mountains of uncertainty ranging from wars, tariff-related global conflicts, the need to confront increasing public debt levels and the resulting directionless economic performance leaves the UIRR CT

Sentiment Index unchanged at "neutral" for the coming 12 months.

The General Assembly of UIRR confirmed the 2024 annual results of Combined Transport, which delivered a convincing rebound of +5,2% following two years of contraction. The composition of the UIRR Combined Transport Community changed in 2024 after the arrival of several new members but also the departures of Kombiverkehr and LINEAS. The UIRR community of operators, terminals, technology partners and peer associations presently counts 113 entities.

The April-June period of 2025 brought about several important developments for Combined Transport. The amended Wagon TSI was adopted by the Member States, which constitutes a major setback for trailer transport by rail. UIRR is currently exploring solutions that can mitigate the additional costs threatened by the revised TSI Wagon. Approval of the TSI Telematics on the other hand was postponed, giving the Combined Transport Community more time to present its arguments for a business-conform solution.

In June, UIRR attended the Transport Logistics Exhibition in Munich, the largest gathering of the sector in Europe. The European Parliament rapporteur for the revision of the Combined Transport Directive, Flavio Tosi (EPP) spoke at the event co-organised with UIRR peer association FERMERCI and the Combined Transport for Europe (CT4EU) campaign. Mr Tosi stated that he will submit his draft report to the Transport Committee upon the completion of a study undertaken by the European Parliament Research Department, which is expected in September. The European Combined Transport Community looks forward to the modernisation of the Combined Transport Directive and anticipates a continued close collaboration of the EU co-legislators: the European Parliament and the Member States in the Council.

The Combined Transport for Europe (CT4EU) campaign has continued its mission of delivering information to policy and decision-makers, as well as organising events and networking opportunities for discussing the relevant topics. Several joint statements were issued during the quarter, with more in the pipeline. The CT4EU campaign provides the opportunity to logistics service providers and shippers committed to Combined Transport to join a community that has a stronger voice together.

UIRR recognises the significant progress and compromise solutions reached by the Polish Council Presidency and the EP rapporteur of the new Railway Infrastructure Capacity Management Regulation, Ms Tilly Metz. The new Regulation will not only enable more efficient digitalised train path allocation but also secure more and better-quality train paths for intermodal freight trains, both during timetabling and when bypassing disruptions or temporary capacity restrictions (TCRs).

We look forward to continuing our mission to advance the cause of Combined Transport.

Ralf-Charley Schultze – Director General

**Femern**

**CT4EU**  
COMBINED TRANSPORT  
FOR EUROPE

**Nordic Seminar and  
Fehmarn Belt Platform Meeting**  
28-29 August 2025 – Copenhagen



**European Intermodal Summit**  
2 December 2025 – online event

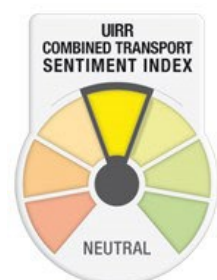
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### UIRR Quarterly CT Performance Gauge



### Business outlook for the 12 months between 1 July 2025 - 30 June 2026



## Binario Italia: a new force is formed to promote rail freight in Italy

April 2025

Italian associations, representing four hundred companies involved with rail freight, are joining forces to revive the industry. The transport agency Agens, rail and intermodal operator association Assoferr, logistics association Assologistica and rail freight associations Fercargo and Fermerci are the founding parties of Binario Italia.

Links: <https://www.uirr.com/en/news/mediacentre/3163-nasce-binario-italia-la-task-force-per-salvare-la-logistica-ferroviaria.html> and <https://www.uirr.com/en/news/mediacentre/3182-italian-companies-unite-in-new-rail-freight-task-force.html>

## Baltic-Adriatic: the priority corridor for Poland

May 2025

The north-south direction should be a priority in Polish public investments. This also applies to access to ports, especially the container terminals of Gdańsk and Gdynia, as well as border crossings with the Czech Republic and Slovakia - stated Dariusz Stefański, president of PCC Intermodal, in an extensive interview.

Link: <https://www.uirr.com/en/news/mediacentre/3150-korytarz-baltyk-adriatyk-bdzie-priorytetem-transportu-intermodalnego-w-polsce.html>

## Sweden: longer and faster freight trains for efficiency

May 2025

The Swedish Transport Administration, Trafikverket, is introducing new rules that allow longer freight trains running at higher speeds. The change creates more space on the tracks for freight and passenger trains, and new train paths for freight trains to and from the continent via the Öresund Bridge.

Link: <https://www.uirr.com/en/news/mediacentre/3140-2025-06-19-15-03-23.html>

## Germany faces complaints about infrastructure availability

May 2025

Deutsche Bahn's infrastructure subsidiary, DBInfraGo, does not offer a European quality service – complained several rail freight associations. Displeasure was expressed directly to the new Transport Minister Patrick Schnieder. The signatories of the complaint include associations from Austria, Slovakia, the Netherlands, Italy, Poland, and the Czech Republic.

Link: <https://www.uirr.com/en/news/mediacentre/3139-2025-06-19-14-58-46.html>

## Germany to limit track access charge increase for freight trains to 15%

June 2025

The Federal Ministry of Transport (BMV) presented a draft bill intended to mitigate the previously looming sharp increases in German track access charges in 2026. In freight transport, the threatened track access charge increases in 2026 could be reduced from up to 35% with the existing regional rail track access charge cap to around 15%.

Link: <https://www.uirr.com/en/news/mediacentre/3194-2025-07-04-14-34-48.html>

## Combined Transport Directive: the outlook according to the EP rapporteur

June 2025

The main obstacles to finalising the CTD lies in the rigidity of the original proposal, which EP rapporteur Flavio Tosi described as "not very attentive to the operational reality of the sector and a product of the Green Deal". "This is why we must develop a text that promotes combined transport, especially in countries where intermodal logistics is still in its infancy or where it could have a greater impact", Tosi added.

Link: <https://www.uirr.com/en/news/mediacentre/3186-fusion-of-combined-transport-and-weights-and-dimensions-directive-remains-unlikely.html>

## Political compromise on the amended EU Drivers' License Directive

April 2025

The recent amendment of the EU Driver's License Directive missed the opportunity to boost road safety by creating a new license category for European Modular Systems trucks of 25m or 32m in length and 60-70-tonnes in gross weight.

Link: <https://www.linkedin.com/feed/update/urn:li:activity:7310281864324300801>

## Romania: track access charge increase backfires on rail freight volumes

May 2025

Romania's rail freight sector has lost 20% of its traffic over the course of the past three years. A big part of the problem concerns the increasing track access charges that aimed at boosting the infrastructure manager's revenues. Yet, it seems to have had the opposite effect.

Link: <https://www.uirr.com/en/news/mediacentre/3173-romania's-growing-rail-fees-backfire-on-infrastructure-manager.html>

## UIRR General Assembly: 2024 a good year for Combined Transport

May 2025

Combined Transport grew by 5,2% in 2024, ending a two-year period of contraction. The UIRR Combined Transport Community expanded dynamically to 113 by adding 4 new members, 4 new technology partners and 6 new MoU peers.

Link: <https://www.uirr.com/en/media-centre/press-releases-and-position-papers/2025/mediacentre/3134-business-year-2024-positive-ct-performance.html>

## Danone advances with Combined Transport

April 2025

Logistics currently accounts for 8 percent of food company Danone's total greenhouse gas emissions, most of which arise from storage and transport. By 2030, the company aims to reduce 800.000 tonnes of greenhouse gases in logistics compared to 2020 – most of which will come from increased use of Combined Transport.

Link:

<https://www.uirr.com/en/news/mediacentre/3177-danone-halbiert-co-emissionen-durch-kombinierten-verkehr.html>

## Tchibo shifts to Combined Transport

April 2025

The coffee company Tchibo receives its raw materials at the ports of Hamburg or Bremerhaven, and it relies on trains for inland journeys. The constant flow of goods is a condition for the Tchibo train concept. Three times a week, a train carrying non-food goods travels from Bremen to Hof in Northeast Bavaria.

Link:

<https://www.uirr.com/en/news/mediacentre/3158-2025-06-20-10-03-52.html>

## France: intermodal terminal capacity extension

May 2025

Following the redevelopment project at the Venissieux-Saint-Priest terminal, which took place over 2 years from September 2022, the largest multimodal terminal in the Auvergne-Rhône-Alpes region has seen its capacity increased by around 40%.

Link:

<https://www.uirr.com/en/news/mediacentre/3148-2025-06-20-08-09-31.html>

## Germany: new terminal to be built in Kaldenkirchen

June 2025

A new intermodal transshipment terminal will be built in Kaldenkirchen, Germany, located close to the border with the Netherlands, just across from the important Dutch logistics node Venlo. The new terminal dedicated to trailers will be one of the most advanced intermodal transshipment facilities in Europe.

Link:

<https://www.uirr.com/en/news/mediacentre/3188-cargobeamer-to-build-one-of-the-most-advanced-intermodal-transshipment-facilities-in-europe.html>

## Spain: intermodal market grows rapidly

June 2025

Medway, the rail subsidiary of the MSC shipping group, is playing a leading role in the recovery of intermodal rail freight in Spain. This performance drives the entire sector upwards. Year-on-year growth extended to nearly 4% in 2024.

Link:

<https://www.uirr.com/en/news/mediacentre/3193-2025-07-04-14-31-58.html>

## Hungary: new intermodal terminal to be built in Szeged

May 2025

Hungary's larger national infrastructure manager, MÁV Pályavasút, will construct a new finished goods and container terminal in Szeged, near the new BYD car plant. The state implemented a capital increase of HUF 14,4 billion (€36 million) to finance the construction works.

Link:

<https://www.uirr.com/en/news/mediacentre/3151-2025-06-20-09-02-49.html>

## Poland: major extension to terminal capacities

May 2025

PKP Cargo, the Polish state-owned rail freight company, will make land available to those wanting to develop terminals throughout Poland to ease the country's terminal capacity shortage, while selling its shares in the **Ślawków and Medyka terminals**. The contract to expand **Euroterminal Ślawków** has in the meanwhile been signed by the Voivodship of Silesia and the central government. The **Gądk terminal**, in western Poland, will also get an upgrade. Gądk will get remote-controlled RMG portal cranes of the latest generation, a larger operational area, as well as longer and new tracks for 750-metre trains.

Link: <https://www.uirr.com/en/news/mediacentre/3172-pkp-wants-to-make-its-land-available-for-new-terminals.html> and <https://www.uirr.com/en/news/mediacentre/3171-2025-07-03-09-18-43.html> and <https://www.uirr.com/en/news/mediacentre/3143-2025-06-19-15-18-47.html> and <https://www.uirr.com/en/news/mediacentre/3165-metrans-expands-its-terminal-in-gdki.html>

## Portugal: new terminal in Entroncamento

May 2025

A new road-rail terminal was developed in Entroncamento, a railway hub with historical relevance in the Portuguese network. Both domestic and international flows will be handled at the facility, which will enable a shift of freight flows from road to rail.

Link: <https://www.uirr.com/en/news/mediacentre/3138-rail-operations-begin-at-new-logistics-terminal-in-portugal.html>

## North America: Q2.2025 intermodal freight grows 5% year-on-year

July 2025

Though at a somewhat reduced pace compared to the 1<sup>st</sup> quarter of the year, intermodal rail freight in North America continued to grow by 5% during the second quarter of 2025 when compared to a year earlier.

Link: <https://www.aar.org/news/aar-reports-weekly-rail-traffic-for-the-week-ending-july-19-2025/>

## Personnel News

MODALIS / DELTA RAIL  
May 2025



**Patrick Bourreau, new Director of Strategy & Development**

Modalis appointed Patrick Bourreau as Director of Strategy and Development to support its expansion in decarbonised multimodal logistics. With 25 years of experience at Geodis and CMA CGM, he will lead the group's strategic roadmap, develop new projects across terminal operations and maintenance infrastructure, and guide the integration of subsidiaries like Delta Rail and CCFC.

NOVATRANS/GCA  
May 2025



## Antoine Limousin, new Head of Terminals

Novatrans/GCA appointed Antoine Limousin as its new the Head of Terminals, who is a railway rolling stock expert with over 25 years of experience in maintenance, fleet management, and team leadership within major groups such as VINCI, EIFFAGE, and EUROTUNNEL. He has strong skills in technical projects, ECM certification, and strategic development.

CFL INTERMODAL  
April 2025



### Reynald Nicolas, new CEO

CFL multimodal appointed Reynald Nicolas as the new CEO of CFL Intermodal, as part of a leadership transition aimed at advancing the company's intermodal operations across Europe. He brings extensive experience from previous roles as CEO of VIIA and Lorry Rail. Prior to that, he spent over a decade at CAT Groupe, including as Managing Director for Benelux. His career began at Groupe Renault, where he specialised in transport operations and logistics systems.

## Members' & Partner's News

CFL MULTIMODAL  
CARGOBEAMER  
CONTARGO  
DUISPORT  
GREENBRIER  
GYSEV CARGO  
HUPAC GROUP  
LUGO TERMINAL  
MERCITALIA INTERMODAL  
MODALIS  
RAIL CARGO GROUP  
RAILPORT ARAD  
TATRAVAGONKA  
WASCOSA

CFL technics is now providing maintenance services for Brittany Ferries' new rail motorway service between Cherbourg and Mouguerre (FR)

### Building Proprietary Terminal in Kaldenkirchen, Germany

State visit from Uzbekistan at the Neuss Container Terminal & New intermodal network between GER-FR-PL

New intermodal corridors in company of LTG & first AESAN-full train starts from Duisburg

## Presenting hand-painted Sdgqmrss pocket wagon

## Announcement of new service contract between GYSEV Cargo and DB Cargo Hungaria

## Securing the modal shift – Hupac stays on course in a difficult market environment

On the Annual Assembly of Fermerci & Ways to a more sustainable future of freight transport

### New locomotives with last mile technology - partnership with Alstom

Dunkerque-Port entrusts the operation of its future Rail-Road transhipment terminal to the Modalis Group

## New TransFER Vienna-Duisburg connection

## Renovation of the terminal

The first TSI wagon with integrated baskets in Europe with ERA approval

New, innovative freight wagon

## Key Dates & Events

28-29 August, Copenhagen (DK)	<b>UIRR Nordic Seminar</b>
28 August, Copenhagen (DK)	<a href="#"><u>Fehmarn Belt Platform Meeting</u></a>
18 September, Budapest (HU)	<a href="#"><u>Hungrail Magyar vasút Konferencia</u></a>
23-24 September, Duisburg (DE)	<a href="#"><u>BME/VDV Intermodalkongress</u></a>
25 September, Madrid (ES)	<a href="#"><u>CETM Southern Europe Multimodal Summit</u></a>
15 October, Paris (FR)	<a href="#"><u>GNTC General Assembly</u></a>
7-9 October, Žilina (SK)	<a href="#"><u>ArosRail Horizonty Conference</u></a>
9 October, Budapest (HU)	<a href="#"><u>MLSZKSZ CEE Intermodális Konferencia</u></a>
14 October, Athens (GR)	<a href="#"><u>EENMA ESN Conference</u></a>
14-16 October, Bucharest (RO)	<a href="#"><u>USER Translogistica Romania</u></a>
14-15 October, Bucharest (RO)	<a href="#"><u>Railway Days 2025</u></a>
19 November, Antwerp (BE)	<a href="#"><u>Intermodal Market Place</u></a>
2 December, Online	<b>UIRR European Intermodal Summit</b>



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