



Combined Transport loses steam

European Combined Transport concluded a difficult summer season, mainly due to disruptions caused by extensive infrastructure works. Coupled with weak economic performance, this resulted in a negative growth of 1,35% compared to the same period of 2024. Similar continued uncertainties mean that the UIRR CT Sentiment Index remains unchanged at "neutral" for the coming 12 months.

Demand for well-performing Combined Transport is driven by the concerns of an increasing number of shippers worried about their carbon footprint and the risks of the imminent truck driver shortage. Regrettably, border-crossing long-distance Combined Transport is struggling to meet customer expectations in terms of quality due to extensive infrastructure works coupled with low prioritisation of bypass capacities and traffic management. More wagon and locomotive capacities are needed to operate a train that must circumvent a worksite, meaning delays and additional operating costs. European Combined Transport Operators are doing their best, but on their own, without the support of policymakers and decision-makers responsible for railway infrastructure, they will not succeed.

The UIRR Report 2024-25, published in July, indicated a 5,2% growth in the number of consignments carried by Combined Transport over the course of 2024. On the back of a strong performance in Q1 this year, there is hope that a positive performance can still be achieved in 2025. Nevertheless, the financial performance of operators remains poor due to the uncompensated efforts required to maintain the capacities and to keep the intermodal freight trains running.

The geopolitical situation of Europe is reorienting political priorities away from the green transition. Military mobility is emerging as an important topic. In its position paper of 3 September, UIRR explains that Combined Transport is the solution to inserting rail freight into military mobility – quickly and efficiently, without costly and time-consuming investments.

The adoption of the Rail Infrastructure Capacity Management Regulation will be instrumental in delivering more and better-quality train paths, both during timetabling and when circumventing sections impacted by works. Equally important is the cross-border focus of the Connecting Europe Facility for Transport (CEF Transport), as is the continued attention to rail freight extended by Infrastructure Managers through the network of Rail Freight Corridors.

The European Commission surprised the Combined Transport Community by listing the ongoing revision of the Combined Transport Directive as "to be withdrawn" in its 2026 work programme. The European Parliament rapporteur, Mr Flavio Tosi, issued an instant statement that the Parliament is actively working on the dossier. A few days before the Commission adopted its work programme, the EP study addressing the specific questions of the rapporteur was concluded. The UIRR Combined Transport Community has encouraged the College of Commissioners to reconsider its position.

Europe's rail infrastructure is perceived to be "expensive". This perception can only change if more value is delivered to society and the economy using the railway infrastructure. Reliably running, with high frequency and fully loaded 740-meter-long freight trains deliver robust value. This value creation should be rewarded by the allocation of a greater number and substantially better-quality cross-border train paths to freight trains.

Ralf-Charley Schultze – Director General

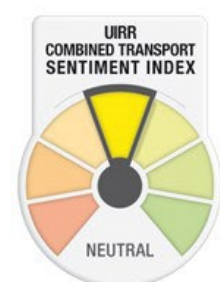
CONTENTS

IKEA chooses intermodal transport	2
Zero-Carbon Combined Transport can deliver decarbonisation goals	2
Hungary: modal-shift funding through REPowerEU Energy Savings Certificates.....	2
UIRR Report 2024-25 published.....	2
KV 4.0 datahub boosts CT competitiveness ..	2
EU-Asia rail container volume contracts	2
Spain: changes to truck dimensions onesidedly advantages road haulage.....	2
Revised TSI Wagon undermines intermodal pocket wagons	2
Inadequate funding for Turin-Lyon base tunnel connection	2
What can be achieved by Combined Transport for Europe?	3
Military Mobility delivered by CT	3
Germany: line closures for H2.2025	3
Switzerland shifts RoLa state aid to UCT.....	3
2026: DB InfraGO to pay operating cost compensation for excessive bypass routes....	3
Germany: state railway strategy forgets to mention freight	3
North America intermodal in Q3.2025	3
Personnel News.....	4
Members' News.....	4
Key Dates & Events.....	4

UIRR Quarterly CT Performance Gauge



Business outlook for the 12 months between 1 October 2025 - 30 September 2026




European Intermodal Summit
2 December 2025 – online event



Intermodal Marketplace
19 November -Antwerpen (BE)

IKEA chooses intermodal rail freight

July 2025

IKEA prioritises intermodality to supply its stores in Central France. Over 30.000 trucks are removed from the roads as a consequence of this decision reducing CO₂ emissions by about 2.500 tonnes annually.

Link: <https://www.uirr.com/web-news/ikea-choisit-le-fret-ferroviaire>

Zero-carbon door-to-door CT delivers decarbonisation goals

July 2025

Door-to-door Combined Transport can save as much as 90% of greenhouse gas emissions compared to its unimodal trucking alternative. In case of Zero-Carbon Combined Transport even 100% carbon-free freight transport is possible. Door-to-door Combined Transport should be transformed into the backbone of Europe's land freight transport system.

Link: <https://www.uirr.com/press-releases-press-release/zero-carbon-combined-transport-can-deliver-european-commissions-go-co2>

Hungary: modal shift funded through REPowerEU Energy Saving Certificates

August 2025

From 1 August the modal shift in a 45-foot container or swap body has become eligible for obtaining for support from Hungary's renewed REPowerEU Energy Saving Certificate system. Semi-trailer-based Combined Transport has already been allowed.

Link: <https://www.uirr.com/web-news/new-opportunities-energy-efficient-equipment-upgrades-hungary>

UIRR Report 2024-25 published

July 2025

2025 marks the 55-year anniversary of the founding of UIRR, the voice of Europe's Combined Transport Community. Today, thanks to the achievements of the past decades, door-to-door Combined Transport represents 10% of Europe's land freight transport. The 5,2% growth in the number of consignments carried by UIRR members in 2024 does not exhaust the potential of this energy-, labour- infrastructure-efficient, safe, secure and environmentally friendly transport mode of the smallest carbon footprint.

Link: <https://www.uirr.com/press-releases-press-release/uiirr-report-2024-25-growth-unclear-outlook>

KV 4.0 datahub to boost Combined Transport's competitiveness

July 2025

The functional connection between Combined Transport actors and their clients enables choosing the right service, facilitate direct booking and follow-up the progress of the consignment from proprietary EDI systems.

Link: <https://www.uirr.com/web-news/je-mehr-sich-kv40-anschiessen-desto-komfortabler-fur-alle>

EU-Asia rail container volume contracts

August 2025

22% reduction in traffic during H1.2025 is only the beginning. The likely continuation of the unfavourable trend could mean a loss of 430.000 TEU for the full year.

Link: <https://www.uirr.com/web-news/rail-container-volume-between-china-and-europe-shows-22-decline>

Spain: change to allowed truck dimensions disadvantages modal-shift

August 2025

Spain increases maximum allowed gross vehicle weight (GVW) for standard truck-trailer combinations to 44 tonnes, while permitting the circulation of European Modular Systems trucks of 25m with 60t GVW and 32m EMS trucks with 70t GVW. Trucks performing Combined Transport road legs may weigh up to 46 tonnes in certain cases. The new rules took effect on 23 October 2025.

Link: <https://www.uirr.com/web-news/spain-gives-green-light-44-tonne-trucks-further-weakening-competition-rail>

Revised Wagon TSI: harmful to intermodal pocket wagons

July 2025

New TSI Wagon requirements mandate a vertical locking force of 85kN for king-pin restraints. The study performed by TU Berlin for UIRR (<https://www.uirr.com/leaflets-and-studies-publications/study-safety-assessment-pocket-wagons>) does not underpin the extreme requirements. UIRR also criticised the inadequate testing. The requirements should take effect after a 7-year transition period in 2032.

Link: <https://www.uirr.com/web-news/tsi-many-wagons-semi-trailers-transport-be-sidelined>

Lyon-Turin base tunnel: inadequate funding threatens the project

August 2025

Recent implementation decisions guarantee a little more than 50% of the total financing needs of the base tunnel construction and a small fraction of the access route upgrades needed in Italy and France. The base tunnel – when built - is projected to result in a substantial modal shift from road to rail.

Link: <https://www.uirr.com/web-news/no-one-can-pay-turin-lyon>

What can be achieved with Combined Transport for Europe?

August 2025

Whether the economy is booming or stagnating, there are good reasons for shippers to rely on Combined Transport. Around three-quarters of all goods are currently transported by truck, half of them over long distances – and this is precisely where the potential lies. Almost everything that travels on long distances by road can also be transported efficiently by rail and inland waterway.

Link: <https://www.uirr.com/web-news/was-kombinierter-verkehr-leisten-kann>

Military Mobility delivered by Combined Transport

September 2025

Intermodal wagons are most easily capable of carrying most military cargo, be it tracked or rubber wheeled vehicles or anything that can be stuffed into a container. Combined Transport Operators are well experienced in organising cross-border trains on short notice, which they could perform for the military as 'critical entities' under the Resilience Directive. Terminals along Europe's four military transport corridors must be prepared to receive and to temporarily store military cargo, which most terminals are capable of doing in a safe and secure manner already today.

Links: <https://www.uirr.com/press-releases/press-release-military-mobility-natural-task-combined-transport> and <https://www.uirr.com/web-news/kv-branche-hofft-auf-auftrage-des-militars> and <https://www.uirr.com/web-news/podcast-intermodalist-episode-1-military-mobility>

Germany: extensive line closures for H2.2025 disrupts rail freight

August 2025

The "Generalsanierung" of the Berlin-Hamburg railway line imposes significant detours, exacerbated by half-a-dozen additional works sites featuring partial lockdowns and resulting in significant disruptions and delays to/from Germany.

Link: <https://www.uirr.com/web-news/rail-freight-transit-through-germany-remains-challenging>

Switzerland shifts RoLa state aid to unaccompanied Combined Transport

August 2025

The Swiss Federal Office for Transport (FOT) announced the transferring of CHF59 million (€63,2 million) in subsidies destined to accompanied combined transport (the RoLa conducted by RAlpin today) to unaccompanied combined transport (UCT) from 2026 onwards. RAlpin will stop its operations at the end of 2025.

Link: <https://www.uirr.com/web-news/switzerland-shifts-subsidies-keep-freight-on-rail>

DB InfraGO: operating cost compensation for excessive bypasses

September 2025

The much-anticipated excessive bypass cost compensation regime will be contained in the 2026 Network Statement expected to be approved by the National Regulatory Body only after the adoption of the Federal Budget for 2026. The leaked proposal indicates very limited compensation in the form of track access charge discounts not considering extra traction and wagon time.

Link: <https://www.uirr.com/web-news/uiirrs-lobby-success>

Germany: state strategy for railway forgets about freight

September 2025

The Railway Strategy document of the new Federal Government focuses on governance issues of separating DB InfraGO from the operational parts of DB, and offers plenty of details on passenger transport, while being very limited on matters of freight. A reform of track access charges has been announced from 1 January 2027 without providing any details. Vaguely formulated intentions towards maintaining single wagonload traffic conclude freight-relevant matters. The rail freight sector has voiced its disappointment.

Link: <https://www.uirr.com/web-news/new-german-rail-strategy-leaves-freight-mostly-dark>

North America: Q3.2025 intermodal freight growth slows

October 2025

The Q3.2025 stagnation of intermodal traffic volumes reduced the 5% year-to-date growth of the first six months of 2025 to 3,6% for the January-September 9-month period. Slower global trade patterns resulted in the reduced intermodal transport performance.

Link: <https://www.aar.org/wp-content/uploads/2025/10/2025-10-08-railtraffic.pdf>

Personnel News

RCG

July 2025



Rafi Papo, Head of Business Unit Intermodal

As of July 2025, **Rafi Papo** has taken over the leadership of the Business Unit Intermodal at ÖBB Rail Cargo Group (RCG). He succeeds Robert Galbavy. Rafi Papo brings extensive experience in the international logistics sector and will continue to drive the strategic development of RCG's intermodal business – with a focus on terminals as well as continental and maritime connections across Europe and into Asia.

VAN DER VLIST

October 2025

New Executive Board appointed: Nico van der Vlist, CEO / Ewout de Graaf, CFO / Anton Stam, COO / Matthijs van der Vlist, CIO. This experienced team, with deep-rooted knowledge of the organisation and sector, will continue to lead Van der Vlist along the course set in 1930.



GYSEV CARGO

November 2025



András Riegler, new CEO

The Board of GYSEV Ltd. appointed **András Riegler** as the new CEO of GYSEV CARGO after **János Boda** stepped down after 39 years of dedicated service at GYSEV Group. With more than a decade of experience within the GYSEV Group, András Riegler as Head of Finance has played a key role in ensuring the company's financial stability and sustainable growth. We thank Mr. János Boda for his decades of commitment and leadership and wish Mr. András Riegler success in his new role.



Members' & Partner's News

ADRIA KOMBI

AMBROGIO TRASPORTI

CAMCO TECHNOLOGIES

CARGOBEAMER

CLIP GROUP

COMBIPASS

CONTARGO

DUISPORT

DUSS

ERMEWA

EUROWAGON

EVOLIT

GPMM

GYSEV CARGO

HACON

INTERPORTO BOLOGNA

LAHAYE GLOBAL

LOHR

LOTAS

LUGO CARGO

LUGO TERMINAL

METRANS

PCC INTERMODAL

RAIL CARGO GROUP

SAMSKIP

VAN DER VLIST

[Change of conditions at SŽ terminals \(Ljubljana, Celje, Maribor\)](#)

[Ambrogio Cup: tennis tournament sponsor](#)

[Investing in radar-powered innovations with AI](#)

[New route between Venlo and Oradea](#)

[New Intermodal Terminal in Małaszewicze – infrastructure of strategic importance for Poland and Europe.](#)

[A two-part container, custom-engineered internal connector](#)

[Poland France Shuttle starts operations](#) and [CT terminal officially opened at Straubing-Sand port](#) and [Christening of the Mannheim I+II](#)

[Duisport has received Eco-Management and Audit Scheme validation \(EMAS\)](#)

[Berlin Terminal is now equipped with 2 smart video gates and 4 lanes with automated barriers as well as a new crane](#)

[Wagons in action](#)

[Eurowagon to lease double pocket wagons](#)

[Intermodal CO₂ efficiencies](#)

[Strategic partnership agreement with Port of Kobe](#)

[First direct blocktrain from Koper has arrived at the Debrecen Intermodal Terminal](#)

[HaCon presented its new app "NextGen"](#)

[The European Commission has approved €24.5 million in Italian state aid for the expansion of the multimodal freight terminal](#)

[Lahaye is expanding its rail-road services with the arrival of 10 new P400 semi-trailers at Trans-Fer.](#)

[New terminal in Cherbourg operated by BrittanyFerries](#)

[Lotras and its parent company CFI become part of the new FHP Group](#)

[LTG Cargo Polska has received EUR 7 million of EU fundings to purchase new wagons for intermodal](#)

[R2L connector making possible what previously seemed unthinkable: loading non-craneable semi-trailers onto trains](#)

[METRANS Prague terminal again ready for further capacity](#)

[Project "Purchase of railway platforms to service the network of connections of PCC Intermodal S.A."](#)

[Digitalisation project at voestalpine Stahl Donawitz. Development of tailor-made digital solutions in close cooperation with its customers](#)

[Joined the DCSA+ partnership program to contribute developing standardisation and digitalisation](#)

[Opening of a new terminal in Moerdijk and S-Bolster officially hit the tracks after a period of research and development.](#)

Key Dates & Events

12–13 November, Berlin (DE)

19 November, Antwerp (BE)

19 November, Milan (IT)

20 November, Vienna (AT)

25 November, Hamburg (DE)

2 December, Online

3–4 December, Tbilisi (GE)

9–10 December, Ljubljana (SI)

13–14 January 2026, Hamburg (DE)

3–4 February 2026, Berlin (DE)

[SGKV – Der KV-Kongress](#)

[Intermodal Market Place](#)

[European Silk Road Summit](#)

[International Mobility Days - WKÖ](#)

[4. DVZ KV Kongress](#)

[UIRR 6th European Intermodal Summit](#)

[Multimodal Transport and Transit Forum](#)

[Danube region transport days conference](#)

[Neujahrsempfang und 16. VPI-Symposium](#)

[19. BME/VDV-Forum Schienengüterverkehr](#)



INTERNATIONAL UNION
FOR ROAD-RAIL
COMBINED TRANSPORT

UIRR SC

31 rue Montoyer - B-1000 Brussels (BE)

Tel: +32 2 548 78 90

E-mail: news@uirr.com

Internet: www.uirr.com

Editor: Ákos Érsek, UIRR