



Combined Transport delivers a flat quarter

European Combined Transport (CT) closed 2025 on a stagnant note. Despite positive GDP growth across Europe, the sector underperformed, ending the fourth quarter with a **slight 0.22% decline in transport performance**.

The "flat" year was primarily driven by operational hurdles:

- **Infrastructure chaos:** Extensive and uncoordinated rail works led to frequent train cancellations and forced numerous compromises that reduced available capacity.
- **Severe winter conditions** overwhelmed infrastructure managers, further destabilising the network.

The Solution: To reverse this, the industry is calling for enhanced coordination between Member States and better yearly planning of bypass routes specifically designed to handle the technical needs of intermodal freight trains.

Legislative turmoil: The final months of 2025 were marked by significant political uncertainty regarding the **Combined Transport Directive (92/106)**:

- **The Shock Withdrawal:** To the surprise of the industry, the European Commission indicated an intention to withdraw the proposed amendment to the Directive.
- **Parliamentary Pushback:** This announcement followed a new study by the European Parliament Research Services. Lead Rapporteur **Flavio Tosi** and a majority of the Transport Committee have expressed a strong desire to keep the dossier alive and continue working on it.
- **The Cyprus Presidency:** As of January 1, 2026, the **Cyprus Presidency** did not initially list the Directive in its program. However, Transport Minister Alexis Vafeades has since confirmed openness to discussing it within the Council Working Party.

Strategic win: While the CT Directive faces hurdles, the CT Community welcomes the **trilogue agreement on the Rail Infrastructure Capacity Management Regulation**:

- **More and better-quality train paths:** the new Regulation is expected to provide more and better-quality train paths for cross-border freight trains.
- **KPI alignment:** crucially, the deal explicitly links performance to **TEN-T Regulation (2024/1679)** standards that define targets for **freight train punctuality and border crossing times**.

Given the fragile global trade outlook and weak economic performance, as well as the persisting rail infrastructure challenges, the **UIRR CT Sentiment Index** remains "**Neutral**" for the next 12 months. Without better infrastructure foresight and planning, and amid the policy uncertainties, the European CT Community remains in a "wait-and-see" mode.

As from 1 January 2026, based on the rotation principle within the UIRR Board of Directors, Jürgen Albersmann, CEO of CONTARGO, takes over the Chairmanship of the BoD, Peter Kiss, CEO of METRANS, becomes Vice-Chair. We would like to sincerely thank Michail Stahlhut, CEO of HUPAC, for his strong commitment and dedicated leadership at the helm of UIRR.

Ralf-Charley Schultze
Director General

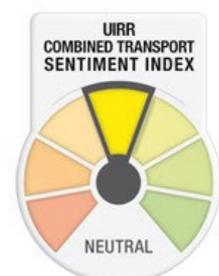
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UIRR Quarterly CT Performance Gauge



Business outlook for the 12 months between 1 January 2026 - 31 December 2026



Amazon Expo:
The Shift from Road to Rail & Sea:
Unlocking Intermodal Transport in the EU

6 March 2026, Brussels



**Combined Transport for
Island Member States**

18 March 2026, Brussels

Intermodal freight helps Amazon halve its carbon footprint

October 2025

Intermodal transportation has helped Amazon reduce their logistics-related carbon emissions by 50% compared to road-only operations.

[Link: https://www.uirr.com/web-news/intermodal-helps-amazon-freight-halve-emissions-also-presents-its-own-challenges](https://www.uirr.com/web-news/intermodal-helps-amazon-freight-halve-emissions-also-presents-its-own-challenges)

Global intermodal freight transport market will double

December 2025

The global intermodal transport market will grow to \$109.5 billion in 2032, reaching an average annual growth rate of 10.4% until then.

[Link: https://www.uirr.com/web-news/global-intermodal-transport-market-will-double-coming-years](https://www.uirr.com/web-news/global-intermodal-transport-market-will-double-coming-years)

Germany: BETUWE-route 3rd track link to take 10 more years to complete

December 2025

Not all the necessary environmental and building permits for the remaining part of the third track have been finalised, therefore a full connection of the Betuwe Line to the third track in Germany will likely not be completed within the next 10 years.

[Link: https://www.uirr.com/web-news/80-weeks-over-10-years-german-connection-netherlands-wont-be-ready-long-shot](https://www.uirr.com/web-news/80-weeks-over-10-years-german-connection-netherlands-wont-be-ready-long-shot)

Switzerland pauses unilateral wagon measures

December 2025

In response to the lawsuit filed by major companies against the Swiss unilateral wagon safety measures enacted by the FOT earlier this year, the Swiss Federal Administrative Court has now issued an order provisionally suspending the measures.

[Link: https://www.uirr.com/web-news/swiss-court-order-pauses-swiss-unilateral-wagon-safety-measures](https://www.uirr.com/web-news/swiss-court-order-pauses-swiss-unilateral-wagon-safety-measures)

Italy: rail freight faces huge obstacles

December 2025

Poor cross-border or international coordination has been a major topic in recent weeks. Accelerated efforts to bridge historical gaps in the national railway network are causing numerous scheduled interruptions and an increase in construction sites.

[Link: https://www.uirr.com/web-news/italian-rail-freight-sees-laundry-list-problems-situation-extremely-complex](https://www.uirr.com/web-news/italian-rail-freight-sees-laundry-list-problems-situation-extremely-complex)

Switzerland: rail freight share declines in Transalpine traffic

October 2025

The decrease in rail volume accelerated, resulting in a 15.8% drop compared to the previous year, reaching 11.69 million tons (H1 2024: 14.12 million tons). The partial closure of the Simplon Tunnel due to construction works was the primary reason.

[Link: https://www.uirr.com/web-news/transalpine-rail-freight-declines](https://www.uirr.com/web-news/transalpine-rail-freight-declines)

Austria: 40% modal share of rail freight will be reached by 2040

November 2025

The Alpine nation has developed extensive funding programs for rail freight transport. Compared to Germany, the neighbouring country has set itself significantly more ambitious goals: the modal split is projected to reach 40 percent by 2040.

[Link: https://www.uirr.com/web-news/austria-ambitious-goals-rail-freight-2040](https://www.uirr.com/web-news/austria-ambitious-goals-rail-freight-2040)

EU: trilogue agreement reached on new Rail Capacity Regulation

November 2025

The European Parliament represented by rapporteur Tilly Metz of Luxembourg and the Council led by the Danish Presidency reached an agreement to harmonise, simplify and rationalise the management of the available infrastructure capacity for trains on the EU's rail network, both within and across member states. The new Regulation will deliver more and better-quality train paths for cross-border freight trains. The reform prescribed in the Regulation will be fully implemented by December 2030.

[Link: https://www.consilium.europa.eu/en/press/press-releases/2025/11/19/council-and-parliament-agree-on-rules-for-a-better-management-and-increased-use-of-europe-s-railway-infrastructure/](https://www.consilium.europa.eu/en/press/press-releases/2025/11/19/council-and-parliament-agree-on-rules-for-a-better-management-and-increased-use-of-europe-s-railway-infrastructure/)

European intermodal freight operators call for help

October 2025

Intermodal freight operators and associations, including UIRR, issued a joint open letter to German Federal Transport Minister Patrick Schnieder and the new CEO of Deutsche Bahn, Evelyn Palla, addressing rising concerns over infrastructure bottlenecks, service quality, access charges, and the operational consequences of upcoming full-scale maintenance works on key combined transport corridors.

[Link: https://www.uirr.com/web-news/intermodal-operators-call-help-freight-shifts-back-road-immediate-policy-response-urgent](https://www.uirr.com/web-news/intermodal-operators-call-help-freight-shifts-back-road-immediate-policy-response-urgent)

EU: European Parliament to legislate CT Directive amendment

January 2026

A decisive majority of political groups in the European Parliament rejected the Commission's intended withdrawal of the Combined Transport Directive revision proposal. The question must be addressed in the Council too, where the Cyprus Presidency will survey the intention of the Member States in the coming weeks.

[Link: https://www.uirr.com/web-news/combined-transport-directive-might-survive-after-all](https://www.uirr.com/web-news/combined-transport-directive-might-survive-after-all)
<https://www.uirr.com/web-news/europe-considering-leaving-combined-transport-out-its-2026-agenda>

Italy: single locomotive driver operation made possible

October 2025

The Ministry of Transport adopted a new decree that eliminates the requirement for two train drivers to be present on the locomotives. Italy alone made such a requirement, which undermined the competitiveness of rail freight services.

[Link: https://www.uirr.com/web-news/italy-approves-regulation-single-freight-train-driver](https://www.uirr.com/web-news/italy-approves-regulation-single-freight-train-driver)

Rail freight energy consumption down by 53% since 2000

October 2025

Rail is the champion of energy efficiency: the figures speak for themselves. Energy consumption in rail freight transport has been reduced by 53% since 2000. By comparison, trucks consumed 16% less energy during the same period, while inland waterway transport remained almost constant (-2%).

[Links: https://www.uirr.com/web-news/schienenguterverkehr-spart-mehr-als-die-halfte-energie-seit-2000](https://www.uirr.com/web-news/schienenguterverkehr-spart-mehr-als-die-halfte-energie-seit-2000)

ESEP4Freight Project: portal to accelerate modal shift launched

November 2025

The <https://www.intermodal-railfreight.eu> portal was launched by the ESEP4freight (European Shift Enabler Portal 4 Freight) project co-financed by the Horizon Europe programme. The platform includes an Interactive map with a CO₂ calculator, a schedule viewer, a contract toolbox and a matchmaking tool.

[Link: https://www.uirr.com/developments/projects/european-shift-enabler-portal-4-freight](https://www.uirr.com/developments/projects/european-shift-enabler-portal-4-freight)

EU: study on assessing the modal-shift

January 2026

The European Commission published a study on the modal-shift opportunities in the European Union. The findings are striking with nearly 10% of over 2 million long-distance truck origin/destination pairs being underserved by modal shift opportunities largely due to the absence of terminals in over 250 NUT3 regions of the continent. The study should inspire Member States which must complete a terminal capacity study under the TEN-T Regulation by July 2027.

[Link: https://op.europa.eu/en/publication-detail/-/publication/7a2125ed-ec40-11fo-8d3c-01aa75ed71a1](https://op.europa.eu/en/publication-detail/-/publication/7a2125ed-ec40-11fo-8d3c-01aa75ed71a1)
Annexes:
https://transport.ec.europa.eu/document/download/5bc0f6ee-8bc2-4da5-891b-ecf196317603_en?filename=A...

EU: proposal for Military Mobility Regulation tabled

November 2025

The European Commission unveiled a proposal for a new regulation on military mobility. The regulation includes rules on the resilience of the transport infrastructure, including intermodal terminals, as well as on the pooling and sharing of capabilities. Intermodal rail freight's dual use assets, both rolling stock and terminals, will play a pivotal role in future military mobility.

[Link: https://transport.ec.europa.eu/news-events/news/commission-moves-towards-military-schengen-and-transformation-defence-industry-2025-11-19_en](https://transport.ec.europa.eu/news-events/news/commission-moves-towards-military-schengen-and-transformation-defence-industry-2025-11-19_en)

Terminals: new terminal construction or upgrade projects

October-December 2025

- Hupac's Barcelona Combiconnect Terminal in La Llagosta.
- METRANS has started building a new intermodal logistics hub in Szeged, Hungary.
- A new DUSS terminal is scheduled to go into operation in Augsburg in 2026.
- The new Turkish intermodal terminal Railport, the first private terminal in Türkiye, has started operations near Istanbul.
- Two new terminals will open in Mérida and Naval Moral de la Mata in the Extremadura region of Spain.
- A new urban rail logistics hub in Zurich's Hardfeld district opened in November, which is to reduce inbound truck traffic to the city by 58.000 units.
- The first of two new gantry cranes was erected at CLIP's East Poland Terminal in Malaszewicze.

[Link: https://www.uirr.com/web-news/hupac-terminal-barcelona-getting-ready-first-trains](https://www.uirr.com/web-news/hupac-terminal-barcelona-getting-ready-first-trains)
<https://www.uirr.com/web-news/metrans-starts-building-szeged-intermodal-hub-amid-rising-industrial-demand-southern>
<https://www.uirr.com/web-news/duss-unveils-major-terminal-capacity-extension-plan>
<https://www.uirr.com/web-news/turkish-railport-terminal-launches-operations-metrans-train>
<https://www.uirr.com/web-news/two-medway-terminals-spain-open-coming-half-year>
<https://www.uirr.com/web-news/swiss-coop-opens-zurich-rail-hub>
<https://www.uirr.com/web-news/first-crane-east-poland-terminal-mala>

North America: 2025 intermodal freight growth slows

December 2025

Year-on-year growth of intermodal rail freight in North America was 4,2% in 2025. The transport of international ISO containers expanded by 5,1%, domestic containers by 3,4%, while the transport of trailers by rail declined by 12%.

[Link: https://www.aar.org/data-center/](https://www.aar.org/data-center/)

Personnel News

HUPAC GROUP

February 2026



Britta Weber, new CEO

Hupac Group has appointed Britta Weber – current Vice President UPS Healthcare for Europe and Asia - as CEO, effective 1 July 2026, succeeding Michail Stahlhut. She becomes the company's fourth CEO and first female leader, bringing extensive international logistics experience. Her appointment supports Hupac's next growth phase, focused on combined transport, sustainable solutions, and strengthening its market position in Europe.

HUPAC GROUP

December 2025



Bruno Fischer, new Director Public Affairs & Communications

Bruno Fischer will lead the Hupac Group's relations with political institutions, associations, and regulators across Europe, while overseeing internal and external communications. He will play a key role in strengthening dialogue with policymakers and stakeholders. The transition will be supported by Irmtraut Tonndorf, who will ensure continuity before retiring after a long career.

CARGOBEAMER

January 2026



Julian Hagenschulte, new Chief Digital Officer

Hagenschulte joins from PwC, where he served as Head of Digital & AI Advisory, responsible for Capital Projects, Infrastructure, and Real Estate. He will drive the group-wide digital strategy and will play a key role in driving digital transformation across CargoBeamer's entire value chain. With the addition of Hagenschulte, the Executive Board of CargoBeamer AG now consists of five members.

LOKOMOTION GMBH

January 2026



Ruby van der Sluis, new Managing Director

After 26 years, Armin Riedl has retired as founding Managing Director of Lokomotion GmbH. He stepped down on 31 December 2025, handing over leadership to Ruby van der Sluis, who has been running the business alongside him since 1 January 2023. Having previously held the position of sales manager at Lokomotion for many years, she will now ensure continuity in the management of the company as sole managing director.

SAMSKIP

December 2025



Ólafur Orri Ólafsson, new CEO

Ólafur Orri Ólafsson has been appointed CEO of the Samskip Group, succeeding Kari-Pekka Laaksonen. Under Kari-Pekka's leadership, Samskip strengthened its multimodal network, expanded into new markets, and advanced its decarbonisation and digital transformation efforts. Ólafur brings deep knowledge of the business and a strong commitment to leading Samskip into the future.

Members' & Partner's News

AMBROGIO INTERMODAL

BALTIC RAIL

CARGOBEAMER

CLIP GROUP

CONTARGO

DUSS

EAST WEST IL

GYSEV CARGO

HAVEN GENK

HUPAC

INTERPORTO BOLOGNA

JOHN G. RUSSELL

KTL

LAHAYE GLOBAL

LTG CARGO

LUGO TERMINAL

METRANS

MERCITALIA INTERMODAL

NAVILAND CARGO

RAIL CARGO GROUP

VAN DER VLIET

VIIA

EQUIMODAL

MFD RAIL

SCHMITZ CARGOBULL

TATRAVAGONKA

TRANSPOREON

UNIT 45

VTG

WASCOSA

WECON

- ["Safe on Truck" - event on safety and sustainability for drivers & Visibility Now!, the event for Supply Chain and Transportation](#)
- [Baltic Rail at RAIL&PORTS 2025: developments of the Baltic Adriatic Corridor and its connections to the Middle Corridor](#)
- [CargoBeamer opens new connection between Liège and Domodossola](#)
- [Consortium for the Construction of an intermodal terminal in Zabrze & a new X-ray crane at East Poland MALA Terminal](#)
- [New rail product: Straubing Nordhafen Shuttle & Participation in Cargo-Center-Graz Logistik](#)
- [First crane installed in the new module at the DUSS terminal in Kornwestheim](#)
- [New crane accessory: new hook frame manufactured by Tec Container](#)
- [Raaberbahn Cargo successfully implements Ab Ovo Rail Cargo Solution.](#)
- [Port of Genk becomes Genk Cargo Connect](#)
- [State visit of Federal Councillor Albert Rösti to their terminal in Busto Arsizio.](#)
- [Interporto Bologna awarded by Assologistica for its "Ethical Logistics" project](#)
- [John G Russell \(Transport\) Ltd has been named Scottish Environmental Haulier of the Year by Transport News.](#)
- [KTL will work together with the company CONROO in the future](#)
- [Rennes Terminal railway terminal hosted a new stage of the SavoirLeFer programme](#)
- [Customer Direction 2025 conference & improving the working conditions of its employees with exoskeletons](#)
- [Introduction of new tipper trucks for the transport of bulk goods, strengthening the operational capacity across the region](#)
- [New e-trucks in use & Development of the Košice Intermodal Terminal & Construction of a new intermodal logistics hub in Szeged](#)
- [Lineas and FS Logistix officially inaugurated Modalink at the Antwerp Mainhub Terminal](#)
- [20 years of Naviland Cargo. key milestones](#)
- [The ÖBB Rail Cargo Group \(RCG\) connects Europe and Turkey through a powerful logistics network.](#)
- [A New Step in Rail Transport: Meet the Cargo-basket](#)
- [Inauguration of the new VIIA Rail Highway terminal of the Port of Sète, equipped with Modalohr horizontal loading technology](#)
- [Project: engineering modular, containerised energy and data centers solutions](#)
- [New long-term lease agreement with a major customer for 500 Eanos railcars](#)
- [Published its Sustainability report & EcoDuo pilot project in Germany successfully completed](#)
- [Received an award for the largest exporters in recognition of their contribution to promoting the interests of the Slovak Republic](#)
- [Transporeon launches new transport planning capabilities](#)
- [UNIT45 launches groundbreaking electric reefer at Intermodal Europe in Barcelona](#)
- [Cooperation with Waggonbau Graaff to develop an innovative solution: next generation CO₂ tank wagons](#)
- [Visit at the Container Terminal in Osnabrück: loading non-craneable truck trailers onto Wascosa pocket wagons](#)
- [New articulated combinations](#)

Key Dates & Events

3-4 March, Düsseldorf (DE)	CT4EU - ICTC Port Technology Intermodal conference	20-22 April, Constanta (RO)	Black Sea Transport Corridors 2026
6 March, Brussels (BE)	Amazon Expo – CT4EU: The Shift from Road to Rail & Sea	22-23 April, Ghent-Antwerp (BE)	F&L Spring Roundtable
10-13 March, Verona (IT)	LetExpo 2026	6-8 May, Leipzig (DE)	ITF 2026 Summit: Funding Resilient Transport
12-March, Breda (NL)	ICT group: Multimodal Transport Expo 2026	18-20 May, Bucharest (RO)	European Congress SEEFF x FIATA REU 2026
18 March, Brussels (BE) - EP	CT4EU event: Combined Transport for Island Nations	18-21 May, Budapest (HU)	TRA (Transport Research Arena)
18-20 March, Klaipėda (LT)	German-Lithuanian Maritime Forum	20-21 May, Brussels (BE)	UIRR conference & General Assembly
25 March, Berlin (DE)	RAILTALKS.#22: Germany's next Baumodell!	27-28 May, Lyon (FR)	Railway Supplier Summit
31 March - 2 April, Paris (FR)	SITL: Salon international du transport et de la logistique	27-29 May, Bol (HR)	9th International Conference on Road and Rail Infra
8-10 April, Portorož (SL)	13th International Logistics Congress 2026	28-29 May, Špindlerův Mlýn (CZ)	ŽESNAD.CZ conference