



# UIRR Report

EUROPEAN ROAD-RAIL COMBINED TRANSPORT

**2013-14**

## UIRR is an industry association which

Promotes the public understanding and appreciation of Road-Rail Combined Transport,  
Enhances the development and the proliferation of industry best practice,  
Supports the daily operation of European Combined Transport through different services.

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# Key figures of Combined Transport



**+25**

*the number of new CT services introduced in 2013*

Despite the modest growth of traffic, UIRR members have introduced altogether **25** new CT services over the course of 2013. Including these new relations, UIRR members organise trains connecting nearly **350** terminals across the whole of Europe.

While Combined Transport is held to be most competitive over long(er) distances, the 53 thousand consignments that travelled on distances **shorter than 300 km** are proof that CT is also a choice for shipments falling into the range of day-trucking.

**49**  
in **50**

*CT consignments travelled on distances longer than 300 km*

**13%**

*was the growth of semi-trailer based consignments*

Craneable semi-trailers showed a significant growth in popularity over 2013 delivering a 13% increase as compared to 2012. Semi-trailer-based consignments constituted **1 in every 7** shipments handled by UIRR Operators in 2013.

## 2013: moderate growth returns

The past year - in a nutshell - saw moderate growth to return to European Road-Rail Combined Transport as it expanded by 3,84% in terms of consignments and 4,25% in tonne-kilometres. This is seen as a sign of recovery after the longest economic crisis since World War II.

The average distance travelled by a CT consignment was 725 km in 2013, which constitutes a small increase when compared with a year earlier. The relatively shorter haul CT services declined disproportionately, while demand for the longer distance CT forwarding held up better.

The cautious optimism of CT Operators towards expected growth remains for the foreseeable future, which mirrors the return of economic growth in Europe.

# The State of Affairs

FROM THE CHAIRMAN AND THE DIRECTOR GENERAL



**Both European Road-Rail Combined Transport (CT) and UIRR, its industry association, developed positively in 2013: CT traffic grew by 3,84% in terms of consignments and 4,25% in tonne-kilometres. UIRR progressed at the same time in fulfilling its strategic aim of contributing to the growing of the market for CT through competition, based on technical merit and the professionalism of the entities offering it.**

## CT performance

Combined Transport Operators represented by UIRR have experienced a growth in traffic during 2013, however its rate is yet to reach the average annual growth realised over the decade preceding the crisis. This performance was realised on the basis of a recovery in economic activities, no significant or unforeseen rail infrastructure disturbances, and the constant efforts of CT Operators and Terminal Managers to extend the best possible services, while striving for greater efficiency.

The main challenge in 2013 were prices, which - in European land transport - are determined by the dominant road hauliers. Freight rates were depressed due to the excessive trucking capacity as (longer distance) road haulage performance still falls more than 15% short of its pre-crisis peak. This resulted in fierce market-share protection through aggressive pricing. CT Operators are very limited in their ability to match these pricing developments; hence they focus on strict cost controlling, adjustments to their service offering, and reinforced marketing efforts.

UIRR is convinced that homogeneously structured and comparable infrastructure managers, as well as an end to the privileged status enjoyed by incumbent railways operating in vertically integrated undertakings are needed in order for European rail to perform better. The UIRR Quality Statistics Service data for 2013 shows no clear sign of improvement in the punctuality of freight trains. Unfortunately, railway reform progressed sluggishly, or was outright reversed in several Member States during the past year. The quality of train paths offered, including maximum allowed train length, and gross weight, as well as the schedule-speed in most cases also failed to advance. The extent of private capital influx into the railway sector remained much lower than desirable, effectively limiting the potential improvements that competition could deliver.

## Developments in the regulatory framework

The availability and quality of railways is largely influenced by the sector's regulatory framework that is decided on a European level. 2013 was an important year as several pieces of legislation were discussed by the European co-legislators:

- the new TEN-T guidelines along with their financing vehicle, the Connecting Europe Facility (CEF), were adopted in December: this should help resolve the infrastructure development deficiencies along the TEN-T network, as well as provide funding for research and development under Shift2Rail/Horizon 2020.
- the Fourth Railway Package: European level safety and interoperability harmonisation, as well as an elevated role for the European Railway Agency constitute the so-called Technical Pillar of the package that was wholeheartedly welcomed by UIRR as it is foreseen to boost operational efficiency; on the other hand the Governance Pillar has not fared as well, struggling under fierce lobbying by incumbent railways. Fortunately the legislation is far from being adopted, hence favourable changes might still occur.
- the Rail Freight Corridor Regulation implementation handbook: progressed the cause of the nine European cross-border railway corridors dedicated to rail freight much to UIRR's liking, which speaks for CT Operators, as Authorised Applicants, and Terminal Managers in the European Commission's Corridor Conference.
- Implementing acts under the Recast First Railway Package: the Commission is closest to finalising the act on the railway market monitoring scheme (RMMS) - covering railway statistics reporting by Member States.

*Combined Transport Operators represented by UIRR have experienced a growth in traffic during 2013.*



**Robert Breuhahn**, Chairman



**Martin Burkhardt**, Director General



**Ralf-Charley Schultze**, Director General

The cause of levelling the playing field between modes of transport - to enable technical-merit-based competition - unfortunately saw much less progress in 2013. The revision of Directive 96/53 on weights and dimensions of commercial road vehicles proposed by the Commission contains provisions not related to the title of the legislation, which raised eyebrows, such as a new definition for 'intermodal transport' and benefit-rules for short-sea shipping.

Simultaneously, there was no progress on internalisation - beyond that of rail noise - as the expected Eurovignette Directive revision has ultimately not been tabled by the European Commission, while the European co-legislators continued to ignore the much overdue revision of the European energy taxation (Directive 2003/96) - both on the pretext of the economic crisis.

## Achievements of UIRR

In 2013 UIRR celebrated the 25-year Anniversary of its relocation to Brussels. During its quarter Century presence the number of consignments handled by European CT nearly doubled, and emerged as the most dynamically developing production system of rail freight. In 2013 UIRR issued several publications on - among others - the vision of the European CT sector's future development (CT Roadmap 2050), and on weights and dimensions of commercial road vehicles (Directive 96/53).

Two projects co-financed by the EU progressed with UIRR's active participation over 2013: EcoHubs, which aims to develop efficient, environmentally friendly terminals, and DESTINY that targets to catalyse the proliferation of standards and best practices in the marking and codification of loading units, as well as the handling of dangerous goods and load securing in Combined Transport.

The association has welcomed two new CT Operator members at the general assembly closing the 2013 business year: Far East Landbridge Ltd and Trans Eurasia Logistics.

## Outlook and expectations

The UIRR Combined Transport Sentiment Index stands at "cautiously optimistic" for the 12 month-period starting 1 April 2014. This reflects hope and confidence in a further recovery of CT volumes in the forthcoming months. In the meanwhile UIRR will continue to professionally argue for the policy measures and regulatory framework deemed necessary to deliver the modal-shift objectives, which are indispensable to ensure that long distance freight transport follows a sustainable path of development, and thus contributes to the competitiveness of the European economy, ultimately making Europe a better place to live.

# Unaccompanied Combined Transport



**In 2013 the traffic-volume of Unaccompanied Combined Transport (of containers, swap-bodies and semi-trailers) grew by 3,7% in number of consignments, and 4,2% in tonne-kilometres. The 88.000 consignments added during the past year is a clear departure from the second bottom of the economic crisis of a year earlier. However, the overall 2013 performance of unaccompanied CT fell short of the peak achieved in 2011. UIRR's Unaccompanied Combined Transport (UCT) Operators carried altogether 2.49 million consignments in 2013, as compared to 2.4 million a year earlier.**

## The business case

UCT entails the forwarding of cargo packed into semi-trailers, swap-bodies or containers (collectively: Intermodal Loading Units, or ILU) that are then forwarded using any possible combination of the different modes of transport. Among the various modes, road haulage is typically used to connect the consignment's point of origin to the most conveniently located (nearest) transshipment terminal, where the ILU is transferred for the longer distance segment of its journey to a train, an inland waterway vessel, or a ship of coastal or deep-sea navigation. The ILU is then carried by road haulage from the nearest terminal to its final destination.

The trains that carry most of the continental Combined Transport shipments on the long(er) section of their journeys may be organised as direct shuttles connecting two terminals, or they may run into hub terminals to be reconfigured onto trains running towards a series of different destinations.

UCT is the most progressive form of Combined Transport, since it allows the most efficient separation of the cargo from the vehicles that carry it, while - attributable to the use of ILUs - the transfer from one mode to another may be the most easily and efficiently performed. The combination of modes of transport used to forward an ILU-based consignment means that clever transport planners may achieve the greatest possible energy efficiency in combination with the lowest GHG emissions, and other externalities, for every transport assignment using UCT.

## Most important trends of 2013

The UCT performance of 2013 emerged as a result of several occasionally contradicting forces:

- Aggressive pricing by long haul trucking, which as the dominant mode determines the market rates for freight forwarding. Road hauliers suffer from excessive under-utilised capacities, while they have room to undercut prices attributable to liberalised road-cabotage rules and the ineffectiveness of enforcement.
- Introduction of long-planned electronic tolling has been delayed in several Member States, while financial support programmes that are designed to compensate this regulatory disadvantage to Combined Transport were reduced, restructured, and in at least one case eliminated (in Belgium).
- The quality performance of railway service subcontractors of UIRR Operators did not improve in 2013. Fortunately the significant maintenance-related rail traffic disturbances of 2012 did not repeat themselves.
- + Increased economic activities have led to modest growth in transport demand, which - coupled with an increased climate-change consciousness - has also materialised in more assignments for UCT. The service adjustments implemented by UIRR Operators enabled them to satisfy most demand for UCT services.

## Interesting developments in figures

The increase in (craneable) semi-trailer based consignments outperformed the total UCT traffic growth rate nearly four to one. This phenomenon is explained by several factors, such as (i) the simpler organisation of road positioning legs on either end of the railway journey, as well as (ii) the pricing practice of CT Operators and Terminal Managers, who typically do not differentiate their forwarding or handling fees depending on the type of loading unit used. [For more statistics see p.17-19.]

## *The increase in (craneable) semi-trailer based consignments outperformed the total UCT traffic growth rate nearly four to one.*

### Initiatives for UCT best practice

Besides company level improvements, UCT Operators engage in standardisation efforts coordinated by CEN: (i) EN283 - testing of swap-bodies carrying heavy cargo and their markings, (ii) development of a European craneable semi-trailer envelope - to reach industry agreement on the exterior dimensions of craneable semi-trailers, and (iii) 45-foot pallet-wide European container - to be constructed with rectangular corner fittings as permitted by the revised Directive 96/53 - needs to be defined.

CEN's TC119 has been reactivated in 2013 to address all the CT-related standardisation work. The Committee works with UIRR's active participation.

The DESTINY project - coordinated by UIRR - has dealt with the topics of dangerous goods handling and load securing. Documenting industry best practice, also related

to EN12642, as well as the development of information and e-learning tools also took place under the guise of this Marco Polo common learning project.

Revision of UIC Leaflets containing rules related to Combined Transport was also completed in 2013:

- 571-4 - Standard wagons - Wagons for Combined Transport - Characteristics,
- 592 - Intermodal Transport Units (other than semi-trailers) for vertical transshipment and suitable for carriage on wagons - Minimum requirements,
- 596-5 - Transport of road vehicles on wagons - Technical Organisation - Conveyance of semi-trailers with P coding or N coding on recess wagons,
- 596-6 - Conditions for coding intermodal transport units in combined transport, combined transport lines and wagons.

### Member's Comment

Despite the economic crisis, Cemat, the leading Italian operator of Road-Rail Combined Transport, realised a positive result in 2013.

The levels of traffic achieved were higher than in 2012: growth of transport volumes recorded during the year was determined by the combined effect of contraction in cross-border relations, which were offset by domestic consignments and international door-to-door shipping related to an acquisition in 2012. This enabled Cemat to close 2013 with a positive result.

The major, multi-year strategic investment programme to develop Cemat was continued in parallel. Wagon ownership progressed in particular, as we bought 50 type T3000e pocket wagons suitable for the transport of MEGA-size semi-trailers. These wagons were manufactured in accordance with European standards and applicable TSIs, hence they are fit for circulation along the TEN-T network.

**MARCO GOSSO**

Managing Director  
Cemat



In May 2013, Cemat obtained the ECM (Entity in Charge of Maintenance) certification. This will enable the most efficient and productive management of our wagon fleet in accordance with every safety standard.

The main objectives of Cemat will remain unchanged in 2014, when - despite the ongoing crisis and the related stagnation in demand for transportation on both cross-border and domestic relations - the development of the combined transport services that we offer to customers will continue, whereby we expect to further improve Cemat's position in the market, and ultimately enhance the overall valuation of the company.

# Accompanied Combined Transport



**European Accompanied Combined Transport underwent significant changes in 2013. Rolling Motorway (RoLa) services operated by ÖBB/Rail Cargo Austria/Ökombi was significantly restructured, while the second largest operator of Europe, RAIPin of Switzerland, closed a successful year of business. UIRR's accompanied CT operators realised impressive growth of 6,5% in number of consignments and 7% in tonne-kilometres, meaning that Combined Transport effectively shifted 136.500 trucks off European roads on ecologically sensitive Transalpine relations during the year.**

## The business case

RoLa transport provides a vital service useful to long(er) distance truckers in three cases:

- When road hauliers of a non-EU country have a limited number of permits granted to them for circulation within the European Union, and would nevertheless like to enter Europe.
- In instances of crossing a geographical obstacle, such as the Alps, where the achievable average speed is slowed by steep climbs, and truckers are forced to pay a substantial road-toll.
- If a road haulier has to urgently fulfil an assignment and wishes to progress even at times of (week-end and holiday) driving bans, or during the compulsory rest periods of drivers.

## Developments in 2013

Changes in Austria: ÖBB, the national railway company of Austria, and owner of Ökombi, completed the integration of its Combined Transport activities into its rail freight business, Rail Cargo Austria (RCA) in 2013. This process also entailed the closing of Hungarokombi, the Hungarian RoLa operator subsidiary of Ökombi. The ultimate outcome of this reorganisation is the concentration of RoLa activities to 4 relations [Wörgl- Brenner, Wörgl-Trento, Salzburg-Trieste and Wels-Maribor] on two of which RCA continues to collaborate with Adria Kombi in Slovenia and Alpe Adria in Italy. The restructuring was motivated by the changes in the financial performance of ÖBB, as well as adjustments in the state compensation regime offered to support RoLa services.

Developments in Switzerland: RAIPin, the specialist operator of Rolling Highway services in Switzerland, offers accompanied CT services on 2 relations: Novara (Italy) - Freiburg (Germany), and a domestic Swiss relation between Lugano and Basel. Considering that no major disturbance occurred on the railway lines used by RAIPin, the company realised a strong business performance in 2013.



## Interesting facts of RoLa

RoLa services typically feature an average (timetable) speed of around 40km/h and a punctuality rate of over 90% (where punctuality is measured as being within 30 minutes of scheduled arrival). The cost of forwarding laden trucks and their drivers is between €1.14-1.49 per kilometre, while on some relations the special rate of €0.87 per kilometre is offered for empty trucks (together with their drivers). These figures compare favourably with the variable costs of operating a truck, and are especially attractive if including externalities.

## *Combined Transport effectively shifted 136.500 trucks off European roads on ecologically sensitive Transalpine relations during the year.*

The energy efficiency of transporting complete road vehicles in accompanied CT per tonne-kilometre, according to the EcoTransit Calculator ([www.ecotransit.org](http://www.ecotransit.org)), is 76% better than the autonomous journey of trucks, when powered by their internal combustion engines. If this is coupled with the share of renewable energy sources used in the electricity generation of Alpine countries, the EcoTransit calculator indicates that RoLa emits 92% fewer CO<sub>2</sub> per tonne-kilometre as compared to long distance trucking. The savings of other pollutant- and noise-emissions, and the number of accidents prevented come on top of all this as further advantages from society's point.

### Initiatives of RoLa Operators

Significant efforts are made by Operators to streamline and optimise their operations, as well as to reduce their costs at the same time in order to remain competitive in a very challenging business environment. Initiatives include the insourcing of the maintenance-work related to the special small-diameter wheel-sets of RoLa wagons, and a search for ever more competitive rail traction services, as well as improved quality train paths offering higher average speed and greater punctuality.

An extension to the maximum allowed train length along RoLa routes would enable a significant increase in efficiency: if it would be allowed to increase the typical train consisting of 25 wagons today by 3 additional wagons, RoLa operators could realise a productivity gain in excess of 12% as a single locomotive would remain adequate for its forwarding.

### Member's Comment

Adria Kombi has been operating the RoLa services in collaboration with Kombiverkehr, Ökombi (RCA) and Hungarokombi since 1974 over several relations: Ljubljana-Munich, Ljubljana-Salzburg, Ljubljana-Wels, Maribor-Wels, and Sezana-Szeged. Of these today the only RoLa in service is Maribor-Wels.

In 2013 on average 4 trains were offered on work-days, and 2 on Saturdays and Sundays in each direction with a capacity of 24 trucks each. The journey time for the service covering 345 kilometres is between 8-9 hours depending on the time of the day (overnight trains are faster). The main clients for the service are Turkish, Serbian, Macedonian, Bosnian road haulage companies.

The Maribor-Wels RoLa train is competitive since trucks using it do not have to pay the road toll, while

**ROK SVETEK**  
Managing Director  
ADRIA KOMBI



they save on fuel and other variable costs of travel. The driver is offered a comfortable sleeping berth on the accompanying passenger wagon, where the mandatory rest period may be spent, while the vehicle still travels with an average speed of over 40km/h.

During the 40 year history of these relations altogether 802.499 trucks were carried on the above mentioned destinations translating to 96.300.000 litres of diesel fuel and 255 million tonnes of CO<sub>2</sub> saved, not to mention the number of accidents and other pollution prevented. Adria Kombi remains confident in the competitiveness of this RoLa service.

# Transshipment Terminals



**Transshipment Terminals are the interfaces connecting the various modes of transport that collaborate to forward cargo loaded into the intermodal loading units used in Combined Transport. UIRR Members operated 30 terminals at the end of 2013 [for more information see p.28], while the UIRR Terminal Database contained 347 terminals in total for Europe. Any of the 23.7 million BIC-Code bearing ISO containers used in intercontinental maritime shipping, and the about 630,000 European loading units circulating within the continent - a third of which already bear the ILU-Code marking - may turn up at these terminals for transshipment between a truck and a wagon, ship or inland navigation vessel.**

## Ownership, development and operations

Several entities may own and operate CT Terminals, including rail infrastructure managers, CT Operators, port authorities, dedicated terminal management companies, and logistics service providers. While terminal development is frequently financed by public resources, private capital is also used in several instances. In case public support is used when developing a terminal it must be operated as an "open access terminal". A concession for the management of terminals may occasionally be tendered out to professional terminal management entities.

The lack of a European definition for "open access terminal" - ideally contained in legislation, as well as the conditions that these terminals must fulfil, creates an uncertain situation as presently each Member State may, or may not, set different requirements. Subsequently, CT stakeholders must learn the conditions from terminal to terminal and country to country.

## Terminals and European Freight Corridors

The EU Regulation 913/2010 concerning rail freight corridors is focused around providing connections (pre-arranged train paths) along the nine most important routes of long distance European freight flows between "freight terminals", also including CT Transshipment Terminals. UIRR is the representative of Transshipment Terminals, as well as it speaks for CT Operators in their capacity of Authorised Applicants, at the European Commission's Corridor Conference, which brings together the European Rail Freight Corridor Management Entities, regulatory bodies, Member State representatives and stakeholders.

Considering that 64% of European Combined Transport consignments crossed at least one European border in 2013 [meaning that the train which transported them operated on the different railway networks of at least two countries] it is imperative that the considerations of both CT Operators and Terminal Managers are equally articulated at such a gathering.

### **Gateway Terminal System**

*There are countries and/or regions in Europe that are served by Combined Transport in a structure where frequent trains deliver consignments to and from a centrally located "hub terminal", where different distribution trains are formed to make final delivery to and from end-point terminals within that country or region. The Gateway System enables a greater frequency of CT-train connections, and thus an improved quality, to be offered to shippers.*

*Polzug successfully operates in this structure in Poland using its Hub Terminal in Poznan that is in connection with 3 end-point terminals. The Gateway Terminal System was a long known concept for IFB in Belgium - operating through the Antwerp Main Hub Terminal - which unfortunately was forced to suspend operations in 2013. This became necessary due to the premature phasing-out of a federal Combined Transport compensation programme designed to counterbalance the competitive disadvantage suffered by the CT sector as a consequence of no distance based road tolls applied in Belgium.*

*The Gateway System enables a greater frequency of CT-train connections, and thus an improved quality, to be offered to shippers*

## Enhancements at Terminals

UIRR conducts and/or contributes to several activities that support the development of best practice at European Transshipment Terminals:

- The Marco Polo Common learning Action Project, DESTINY: documents and disseminates best practice in the handling of dangerous goods and load securing, as well as facilitates the proliferation of the new, EN13044 compliant ownership-marking - ILU-Code - that will accelerate the spread of optical character recognition (OCR) technology, which is a powerful tool of operational efficiency enhancement.
- The FP7 financed Ecohubs project specifically aims to boost the environmental performance of terminals through developing an extensive set of recommended measures, as well as a CO<sub>2</sub> calculator to gauge the actual capabilities.
- Terminal Information System, the tool for tracking and tracing to aid the operation of terminals under development by Rail Net Europe (RNE) is also being developed with the contribution of UIRR.



- The UIRR Terminal database provides input to the IT systems of customers and operators on nearly 350 Terminals that operate throughout Europe.

## Member's Comment

Rocombi signed a contract to reactivate the Titan Bucharest Sud Terminal, which belongs to state owned railways CFR Marfa, and take it into its management. The facility, constructed in 1969, has been closed in 2011. It is favourably located near the Bucharest-Constanta motorway capable of efficiently supplying the Southern and South-eastern areas of Bucharest.

The infrastructure of the terminal includes 4 railway tracks, 2 of which are accessible by a gantry crane, as well as 6000sq metres of storage space. The terminal presently receives trains from Italy and Constanta Port, while additional trains to Western Europe are presently being organised together with Rocombi's strategic partners.

**ALEXANDRU STOCIA**

Commercial Director  
Rocombi



The revitalisation of the terminal begun with restoration of the fencing and illumination, while CCTV surveillance has also been installed to secure the area. A second phase of more substantial investments is also being planned, whose scope will be a factor of the amount of market interest confirmed.

Titan Bucharest Sud will operate as an Open Access Terminal, receiving the trains of every CT Operator under equal conditions of access.

# The European business environment



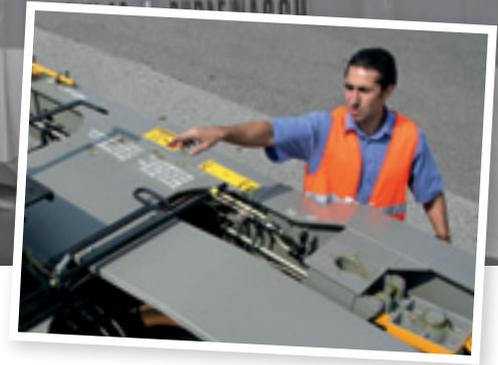
**The business environment of Road-Rail Combined Transport - as embodied by the European regulatory framework - has four major dimensions to address: (i) having fair competition in the European railway sector and its ultimate de-politisation; (ii) equalising the playing-field between the various modes of transport; (iii) ensuring that a competitively managed and adequate transport infrastructure is available; and (iv) contributing to the best practice and the ultimate proliferation of Combined Transport, a most productive way of making freight transport in Europe sustainable. Considering the European elections that will take place in 2014, the balance of 2013 carries an even greater importance; last year CT stakeholders saw major initiatives and ultimately advances in every relevant dimension of transport policy, though the progress achieved was uneven.**

Presently ongoing legislative initiatives	Aims			
	Railway sector competitiveness and de-politicisation	Level playing-field between modes of transport	Competitively managed and adequate transport infrastructure	Best practice and proliferation of Combined Transport
Fourth Railway Package - Technical Pillar	Good proposal further refined in the EP and European Council adoption process. <b>Status:</b> work in progress		n/a	n/a
Fourth Railway Package - Governance Pillar	The proposal was good, however the EP has considerably weakened it in its first reading; the European Council is yet to express itself on the dossier. <b>Status:</b> work in progress			n/a
Weights and dimensions of commercial road vehicles [Directive 96/53]	Commission proposal improved in the EP adoption process; the European Council is yet to express itself on the dossier. <b>Status:</b> work in progress		n/a	n/a
Revised TEN-T guidelines and the Connecting Europe Facility (CEF)	Improved trans-European (cross-border) railway lines that will help compensate the advantage of the accelerated development of highways in the past decades coupled with funding that should trigger a well targeted investment boom into mostly railway infrastructure in the period up until 2030. <b>Status:</b> finalised.			
Horizon 2020 / Shift2Rail	The adequate legal framework and resources seem to be in place to enable the facilitation of meaningful R&D projects to be put in place to help accelerate. <b>Status:</b> finalised.			
Revision of the fuel excise duty directive [2003/96]	The proposal to reform the fuel excise duty regime of the European Union [COM(2011)169] has been laying on the table of the European co-legislators for the third year in vain, as its adoption process has yet to begin. This would be necessary to clarify and valorise European fuel excise duties to allow for the best internalisation of CO <sub>2</sub> and other pollutant emissions. <b>Status:</b> work in progress			
Transformation of the Eurovignette Directive into one that prescribes distance-based electronic tolling - [user-pays principle]	The proposal to transform the Eurovignette Directive into an eToll Directive through <ul style="list-style-type: none"> <li>the declaration of a multi-year time-schedule for the mandatory switch to distance based electronic (road) tolling across Europe,</li> <li>the definition of cost components that is to determine the level of tolls to be applied,</li> <li>the internalisation of congestion and landscape destruction that was drafted and submitted to the College of Commissioners, which decided not to allow the proposal to be officially tabled. <b>Status:</b> work in progress</li> </ul>			

Overall, the biggest achievement of 2013 was the adoption of the revised TEN-T guidelines, the agreement on the Connecting Europe Facility (CEF), which provides financial support to its realisation, and the Shift2Rail joint technology initiative. The Fourth Railway Package Technical Pillar also proceeded in a promising way along with the

weights and dimensions dossier (Directive 96/53); on the other hand, the Governance Pillar of the Fourth Railway Package was severely weakened in the adoption process, while other proposals, intending to adjust the framework conditions of transport (excise duty reform, electronic tolling), were generally held back.

# Challenges and Outlook



In case technological merit based competition would be possible, and at the same time Europe's railway sector were to be de-politicised, Road-Rail Combined Transport could become a significantly more dominant mode of long-distance freight forwarding than today, when it already makes up about a third of all rail freight activities. The present market-share of CT reflects imperfections that can largely be resolved by regulatory realignment and infrastructure development. The main challenge of CT stakeholders in the meanwhile is to continuously enhance their service offering, as well as to maintain the continuous development of organisational excellence.

## The role of standardisation

Sector led standardisation taking place under the coordination of CEN, rail safety and interoperability related development of compulsory 'standards' (TSIs or Technical Specifications for Interoperability) developed by the European Railway Agency, UIC leaflets that describe standard practice on rail all affect CT stakeholders alongside with voluntarily applied industry best practice developed in own initiative, or EU financed projects. UIRR acts to catalyse these processes in the interest of CT, as this system of long(er) distance freight forwarding frequently crossing borders requires the collaboration of two or more different modes of transport, and as such needs standardisation and harmonisation.

## Services to support daily operations

UIRR, as the industry association for Road-Rail Combined Transport, is uniquely positioned to efficiently provide services that support daily operations; these range from various IT-related functions through the UIRR General Terms and Conditions to the issuance and administration of the ILU-Code to help identify European loading units.

## The means of CT Operators

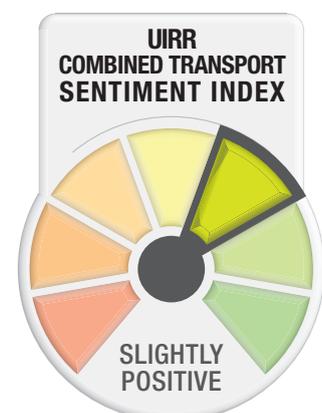
Combined Transport is organised by private entities that operate under the prevailing regulatory and market circumstances; the European CT market is not dominated by any single player. Economic turmoil and the crisis-related adjustments resulted in significant demand fluctuations exacerbated at times by wild reactions in the prevailing freight rates (largely determined by road hauliers).

Even if rather limited, CT Operators have a range of measures at their disposal, through which it is possible to match the challenges; these are for example:

- **Introducing new services** (trains) better adapted to shippers' needs, and follow the developments of rail infrastructure;
- **Enhancing competitiveness** through improved service-quality, application of new technologies, streamlining business practices, and reducing costs;
- **Identifying clever investments** that boost capabilities;
- **Promoting Road-Rail Combined Transport** towards decision-makers to inform them of the potential of this innovative system of freight transport; and to get their support for the necessary corrections of the regulatory framework conditions leading in a fairer direction.

## Outlook

The UIRR CT Sentiment Index remains slightly positive for the 12-month period ahead, reflecting that CT Operators expect the modest upturn in economic output to continue in Europe, while no major disturbance - due for instance to rail infrastructure works - is foreseen.



# Members' News



**ADRIA KOMBI** Following double digit growth in 2012, the Slovenian operator saw an increase in traffic 1% in number of consignments and 2% in tonne-kilometres. Adria Kombi introduced a new IT system used to improve the exchange of data between terminals and operators - through the speeding-up of handling - developed under the Ecohubs Project.

**ALPE ADRIA** The Italian operator focused on the Port of Trieste suffered a significant overall contraction of its traffic attributable to its disproportionately declining cross-border activities that could not have been counterbalanced by the outstanding performance on domestic relations, resulting in an overall decline of 25% in tonne-kilometres and 13% in consignments during 2013.

**BOHEMIAKOMBI** The Czech operator's traffic grew in 2013 by a massive 11% in the number of consignments and 18% in tonne-kilometres realised exclusively over cross-border relations.

**CEMAT** The major Italian operator realised a 5% increase in tkm, while handling 23% more consignments in 2013. Cemat gained the Entity in Charge of Maintenance (ECM) certification during the year. A new IT system was introduced by the company to optimise the loading and load distribution of trains, as well as wagon acquisition continued [for more information see p.7].

**COMBIBERIA** The Spanish CT Operator achieved a 16% increase in tonne-kilometres and a 38% growth in number of consignments handled in 2013.

**CROKOMBI** The CT Operator of Croatia more than doubled its tonne-kilometres performance as compared to a year earlier, while handling 16% more consignments on the back of an increased number of heavy shipments.

**HUPAC** Europe's second largest, Switzerland-based CT Operator, closed an exceptionally strong year delivering 6,5% growth in consignments and an over 10% increase in tonne-kilometres in 2013.

**INTERFERRYBOATS (IFB)** The premature termination of the government compensation scheme, offered to aid Combined Transport in the absence of a distance-based road-tolling scheme in Belgium, forced IFB to suspend operations at the Antwerp Main Hub Terminal, which was the heart of its domestic operations. Subsequently the company suffered a dramatic decline on its domestic traffic. This could not be fully compensated by cross border activities ultimately resulting in a decline of 20% in terms of consignments and 4% in tonne-kilometres. In the meanwhile IFB introduced a new IT system developed under the Ecohubs Project for communication with partners and customers, as well as tracking and tracing.

**KOMBIVERKEHR** The largest CT Operator of Europe - based in Frankfurt, Germany - experienced a stable year in 2013. Service adjustments resulted in the development of domestic network, which counterbalanced the minimal decline suffered on border-crossing relations. Over the course of 2013 Kombiverkehr has completed the retrofitting of all its wagons with silent brake-blocks.



**NAVILAND CARGO** The French CT Operator specialised in providing hinterland port services in France has realised a substantial growth on its domestic network that more than offset the contraction on its cross-border services resulting in an overall growth of 17% in consignments, while 14% in tonne-kilometres.

**NOVATRANS** The French CT Operator turned in a stable performance over 2013 in spite of the company changing hands in the course of the year, being acquired by Group Charles Andre (GCA), a major logistics service provider. See the comment of GCA President, Ms Delphine Andre on p.15.



**POLZUG** Following robust growth in 2012, the operator of CT trains and transshipment terminal specialised in serving Poland, closed another year of massive expansion in 2013 realising 53% growth in tonne-kilometres while handling 37% more consignments. The result is largely attributable to the Gateway Terminal Model that Polzug introduced in Poland [for more information see p.17].

**RALPIN** The Swiss RoLa operator experienced a rebound in 2013, following a disappointing year of contraction attributable to rail infrastructure disturbances a year earlier, which did not repeat themselves, realising substantial growth in both consignments and tonne-kilometres exceeding 13%.

**ROCOMBI** Romania's CT Operator delivered a rather stable year in 2013 after nearly tripling its performance over the preceding year. Moreover, in 2013 Rocombi assumed the Terminal Manager's responsibilities at the Titan Bucharest Sud Terminal [for more information see p.11].

## Member's Comment

The adventure of combined transport for the GCA Group began after the first oil shock of 1973. Concerns about the price of fuel, reserves limited to 30 years, and environmental issues led my father, Charles Pierre André, to open our first CT service in 1977.

Given GCA's orientation towards the transport of bulk solid or liquid goods, we developed a specialised commercial and technical department to plan and manage our fleet of loading units. This is essential to meet the specific needs of our diverse customers in the chemical, building material and food sectors.

Under the leadership of a dynamic team, GCA was able to convince the clients of the benefits offered by Road-Rail CT: expanding transport diversity, weight benefits for heavy shipments on the greater part of the journey, and especially lower price fluctuations caused by the prices of oil.

While all these arguments remain valid today, social and environmental concerns should also be added, as CT allows GCA to maintain permanent jobs in France and Western Europe. Moreover, this transport system has the best CO<sub>2</sub> performance, at 2.5 g/tkm, compared to the competing modes, which is a real advantage to our environmentally conscious customers.

**DELPHINE ANDRÉ**  
President Director General  
Groupe Charles André



GCA, alongside other road hauliers, founded Novatrans in 1984 and upgraded its shareholding in 2006. In 2012, SNCF decided to sell the business. GCA was naturally interested, and as we were able to offer a plan to safeguard employment, essential to any attempt to balance the accounts, GCA acquired the company in 2013.

Since then, the service offering of Novatrans was resized, and the punctuality of trains improved by 20% to about 92%. Account management was improved as well and IT upgrades were implemented to better serve customers.

The work done at Novatrans has not yet been sufficient to return the company to profitability in 2013, however I am confident that this will be achieved by the end of 2014. GCA views Road-Rail combined transport as an important driver of growth for both shippers and railways, who must work together to elevate the quality needed for further development.

In conclusion, the development of combined transport will happen with and not against road, which it complements. Its development will require an improvement of the reliability and productivity through longer and heavier trains, modernised technology platforms, and improved quality train paths.

# UIRR's year in brief



In October 2013 UIRR celebrated the 25th anniversary of the association's relocation to Brussels. The move in 1988 was conducted by Martin Burkhardt, who announced his retirement as Director General as of 30 June 2014. Simultaneously to European Combined Transport's proliferation, and over the decades, UIRR has grown into a well established and recognised industry association. Ralf-Charley Schultze has succeeded Martin Burkhardt at the helm of UIRR starting in the position on 1 January 2014.

## Promoting Combined Transport

UIRR intensively promoted Combined Transport, as well as the views and interests of its stakeholders through position papers, press releases, public speeches and one-on-one meetings. During the past 12 months 16 written public communications were issued of which the 3 most important were:

- Road Legislation Proposal Harms Intermodality (on the amendment of Dir 96/53)
- The Fourth Railway Package Technical Pillar - a top priority
- Railway Market Monitoring (on EU rail statistics collection)

## Working on legislative topics

UIRR worked on rail-sector-related issues (recast of the First Railway Package, the Fourth Railway Package, the Rail Market Monitoring Scheme, the implementation of European Rail Freight Corridors) and road transport topics (aerodynamic elements, weight and dimensions of road vehicles, proliferation of megatrucks). CT-related standardisation work ongoing at the ERA, the UIC and the CEN also proceeded with UIRR's active participation and intervention. Most unfortunately, the European Institutions did not progress on internalisation legislation as neither the excise duty, nor the Eurovignette reforms were put on the table.

## Intervening personally

UIRR staff spoke in representation of CT at nearly 80 events and participated in nearly 50 one-on-one meetings during the past year. UIRR co-organised an event in the European Parliament to discuss the position of Combined Transport stakeholders regarding the revision of Directive 96/53 (weights and dimensions).

UIRR is a registered In-House Lobbyist and Trade Association with the European Parliament and the Commission (Transparency Register no. 49307536642-11), as well as a recognised representative of CT Operators (Authorised Applicants) and Transshipment Terminal Managers at the European Railway Agency, CEN, Eurostat, the European Council, UN ECE, ECD/ITF, the Rail Market Monitoring Scheme, the European Commission Conference of Rail Freight Corridors, and UIC. UIRR's delegate, Director General, Martin Burkhardt is the member representing rail freight customers in the Administrative Board of the European Railway Agency.



## *UIRR is the recognised representative of Combined Transport Operators and Transhipment Terminal Managers.*

### Facilitating professional exchange

UIRR organises the professional exchange of its members in thematic committees. The subjects addressed in these committees are then discussed with the intermodal specialists of traction-service providing railway undertakings under INTERUNIT, which is collectively coordinated by UIC (for railways) and UIRR (on behalf of CT Operators and Terminal Managers).

- **Technical Committee** topics: TSI Wagon, European registers for rail, ECM guidelines, GCU contract, UIC leaflets, codification and labelling of loading units.
- **Operations Committee** topics: Rail Freight Corridor Regulation, longer and heavier trains, punctuality issues and quality monitoring, E-Railfreight Project (to develop paperless CT), aerodynamic devices on trucks.

### Enhancing CT through projects

**DESTINY** is a Marco Polo common learning project initiated and coordinated by UIRR to improve the efficiency of intermodal transport-chains through the proliferation of standards and industry best practice in load securing, dangerous goods handling and the marking and identification of loading units. The project enjoys the active support of an extensive range of industry stakeholders, and promises to deliver practical solutions to enhance the competitiveness of Road-Rail Combined Transport [[www.destiny-project.eu](http://www.destiny-project.eu) - for more information see also p18].



**EcoHubs**, a project that runs with UIRR's active participation, provides models and capabilities for cooperation and communication between multimodal terminal network stakeholders, amplifying, thus, their joint capabilities. It also establishes Common Value Added Services which, combined with existing services, facilitate end-to-end co-modal, low-CO<sub>2</sub> transport solutions that maximise utilisation of terminal and logistics resources and transform multimodal terminals into Green Hubs. [[www.ecohubs.eu](http://www.ecohubs.eu)]



UIRR also contributed in an advisory capacity to the **TelliSys** Project (Intelligent Transport System for Innovative Intermodal Freight Transport) that aims at developing an innovative so-called mega swapbox.

### Supporting daily CT operations

The IT-related services of UIRR, such as the terminal and customer database, or the UIRR data-message format are daily inputs of operations supporting EDI systems.

The UIRR General Terms and Conditions are applied in European CT traffic on a much broader scale than the association's membership.

UIRR, as the Administrator of the ILU-Code, is also active in the provision of ownership-marking, and -identification for loading units used in Combined Transport operations [for more information see p.18].

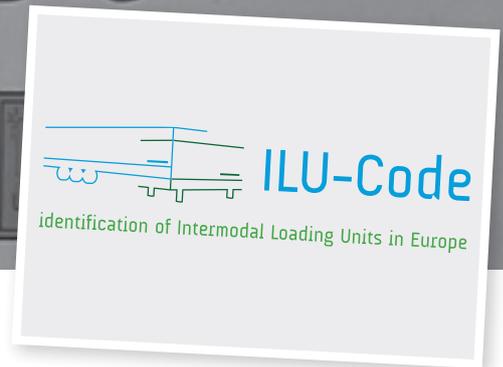
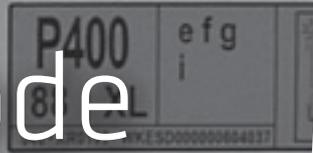
### UIRR's permanent team



From left to right: Eric FEYEN, Pekiye BIÇICI, Ralf-Charley SCHULTZE, Martin BURKHARDT, Barbara BENTO, Ákos ÉRSEK.

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## Administrator of the ILU-Code



The EN13044 standard on the marking of intermodal loading units designates UIRR as the Administrator of the ILU-Code, a new identifier - similar to the world renowned BIC-Code - for semi-trailers, swap-bodies and containers used in European Combined Transport. Distribution of the ILU-Code owner-keys was started by UIRR on 1 July 2011, and the deadline for every loading unit's owner to register itself is 1 July 2014. [[www.ilu-code.eu](http://www.ilu-code.eu)]

### Progress of marking

In the two-and-a-half year period that elapsed since the launch of the ILU-Code owner-key registration on 1 July 2011 nearly 600 companies registered an ILU-Code with an intention to mark altogether 230,000 loading units (containers, swap-bodies and semi-trailers). UIRR together with its partners and supporters has undertaken an extensive campaign to inform the stakeholders under the guise of the DESTINY Project.



- 592 - Intermodal Transport Units (other than semi-trailers) for vertical transshipment and suitable for carriage on wagons - Minimum requirements
- 596-5 - Transport of road vehicles on wagons - Technical Organisation - Conveyance of semi-trailers with P coding or N coding on recess wagons
- 596-6 - Conditions for coding intermodal transport units in combined transport, combined transport lines and wagons

Accordingly, UIC railways will be requiring that every loading unit shipped by rail should feature an ILU- or BIC-Code. For more information on UIC leaflets click here: [www.uic.org/etf](http://www.uic.org/etf).

### Labelling service

In order to catalyse the quick and problem-free labelling of loading units by ILU-Code owner-key registrants UIRR has launched an easy-to-use online labelling service on the [www.ilu-code.eu](http://www.ilu-code.eu) website through which labels for both hard surfaces and tarpaulins can be obtained.

### Revision of UIC Leaflets

UIC completed the revision of its four leaflets related to Combined Transport, which also refer to the ILU- (or BIC-) Code:

- 571-4 - Standard wagons - Wagons for Combined Transport - Characteristics

### User's Comment

Recognising the advantages of the ILU-Code, EKOL ordered all new semi-trailers marked with an ILU-Code by the manufacturer starting in 2013. We have organised to mark all existing units between April and June 2014. EKOL will achieve full ILU-Code compliance by the implementation deadline of 1 July 2014.

EKOL is constantly striving to enhance the efficiency of the CT transport-chains that it organises, and we

**OLIVER SCHUHBAUER**

Manager Intermodal  
Business Development  
Ekol Logistik GmbH



are convinced that the EN13044-compliant ownership marking regime - based on the ILU-Code - will contribute towards this aim. The common marking will lead to reduced processing times and accelerate the truck throughput in transshipment terminals in order to gain the same efficiency we already have at some sea ports thanks to the BIC-Code for maritime containers.

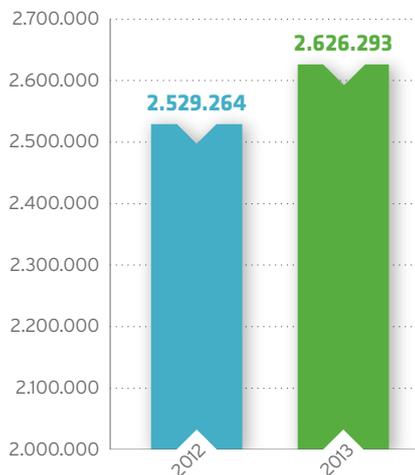
# Statistics Overview 2013

## Summary

In the absence of a significant disturbance on the rail infrastructure, while battling the aggressive pricing of the road sector, European Combined Transport closed a successful year of growth in 2013. Rail traction service quality did not improve, hence, it failed to aid the effort. 25 new services, significant IT-related investments, and a series of smaller innovations and management interventions helped Combined Transport to deliver a positive performance.

	Border Crossing			Domestic			Total		
	2012	2013	2013/2012	2012	2013	2013/2012	2012	2013	2013/2012
Number of consignments	1,603,630	1,701,999	6,13%	925,634	924,294	-0,14%	2,529,264	2,626,293	3,84%
containers	1,206,652	1,273,627	5,55%	860,836	840,720	-2,34%	2,067,488	2,114,347	2,27%
(craneable) semi-trailers	278,344	301,832	8,44%	55,253	73,600	33,21%	333,597	375,432	12,54%
complete trucks (RoLa)	118,634	126,540	6,66%	9,545	9,974	4,49%	128,179	136,514	6,50%
Average distance	843	840	-0,40%	425	473	11,10%	702	722	2,81%
Billion tkm	31,10	32,20	3,51%	7,97	8,54	7,13%	39,08	40,74	4,25%
Number of TEU	3,207,260	3,403,998	6,13%	1,851,268	1,848,588	-0,14%	5,058,528	5,252,586	3,84%

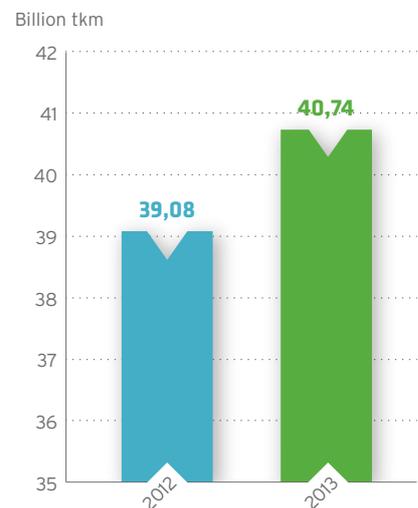
## Consignments 2012-2013



## Distance matrix



## Tonne-kilometres 2012-2013



# Evolution of Combined Transport Traffic

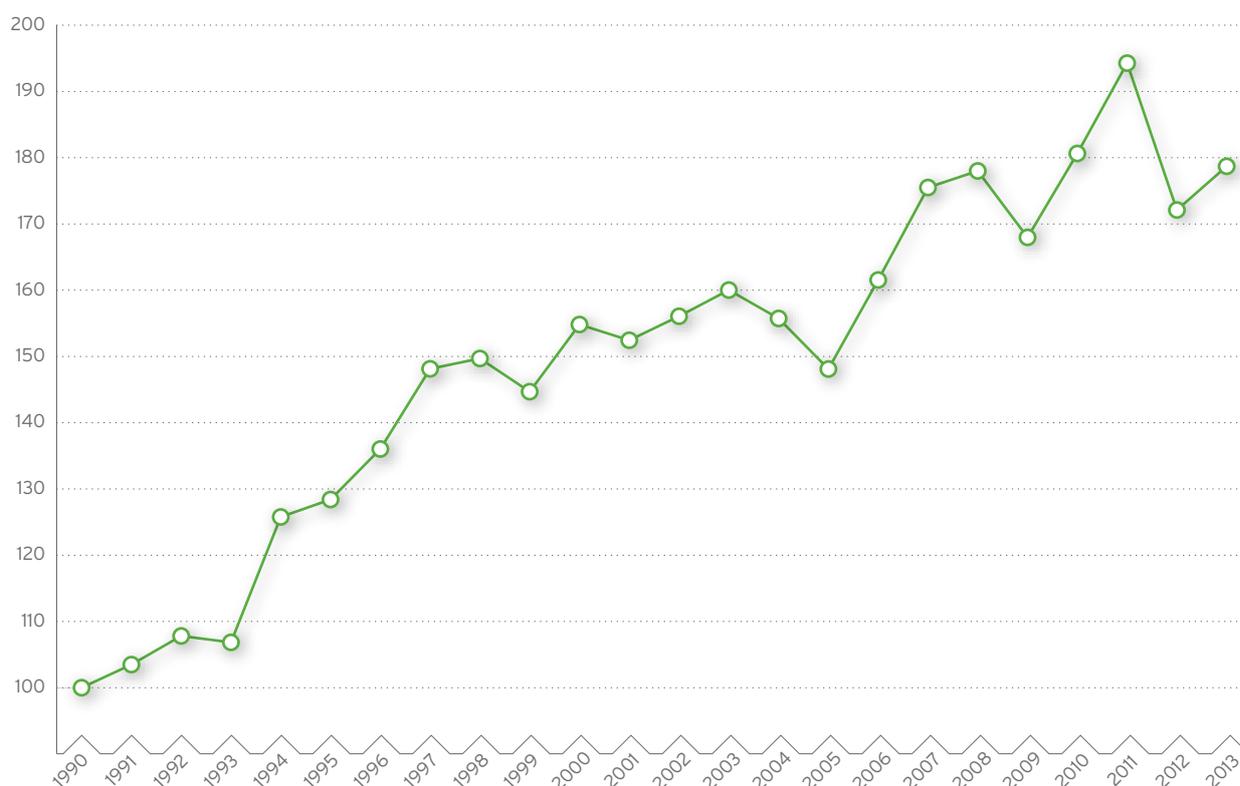
1990 - 2013

COMBINED TRANSPORT					
	1990	1995	2000	2005	2006
<b>Number of consignments</b>	1,183,361	1,615,364	1,967,072	2,457,579	2,717,751
swap bodies and containers	727,275	1,078,979	1,334,377	1,977,630	2,135,976
(craneable) semi-trailers	241,816	224,029	172,275	164,269	199,800
complete trucks (RoLa)	214,270	312,356	460,420	315,680	381,975
<b>Total billion tkm</b>	18,68	24,97	35,18	38,84	45,39
< 300 km	1%	2%	2%	3%	3%
300 km - 600 km	35%	37%	28%	11%	12%
600 km - 900 km	33%	19%	43%	52%	41%
> 900 km	31%	42%	27%	34%	44%

\* Data without Ökombi - Hungarokombi (RoLa operators)

## UIRR CT Growth Index - Consignments

(REFERENCE YEAR: 1990 = 100)



The UIRR CT Growth Index (Consignments) is a time series of year-on-year growth rates in the number of consignments 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 members in the previous year. It is assumed that prevailing UIRR membership in any year since 1990 has been representative of the trends of the entire European CT sector. UIRR will soon begin producing a CT Growth Index (tonne-kilometres) as well.

2007	2008	2009	2010	2011	2012*	2013	% 13-12
2,952,543	2,994,625	2,818,349	3,030,865	3,075,808	2,529,264	2,626,293	3,84%
2,341,690	2,318,990	2,182,569	2,281,746	2,330,918	2,067,488	2,114,347	2,27%
220,970	246,690	219,800	300,867	318,567	333,597	375,432	12,54%
389,883	428,945	415,980	448,252	426,323	128,179*	136,514	6,50%
46,07	45,97	38,90	42,37	42,58	39,08	40,74	4,25%
3%	3%	4%	5%	7%	3%	2%	↓
15%	17%	16%	16%	12%	12%	21%	↑
41%	35%	36%	42%	44%	47%	39%	↓
41%	45%	44%	37%	37%	38%	38%	=

## Analysis

**Overall:** The UIRR CT Growth Index (Consignments) shows - see graph on p.20 - that during the 25 years that UIRR has operated in Brussels, and irrespective of the recent, deepest economic crisis in a Century, Combined Transport performance has doubled. Development has been unabated, despite disturbances in 1998-1999 (enlargement of trucks defined in Directive 96/53, appearance of cheaper East European drivers, and road cabotage liberalisation result in a substantial price drop in road haulage), 2003-2005 (EU enlargement suddenly opens the market to East European road hauliers, who take advantage of inefficient enforcement of road cabotage, which caused a second price drop of freight rates), and 2009-2012 (the double dips of the global financial and European economic crisis).

**By type of loading unit:** The transport of complete trucks, or RoLa, once over 12% of total CT traffic, has contracted, while the proportion of consignments utilising a craneable semi-trailer increased fast, making up over 14%, or about one seventh of total traffic in 2013.

**Prominent CT-relations:** The most important routes of unaccompanied Combined Transport are the ones connecting the Northwest ports area with Northern Italy. RoLa is focused on the Transalpine routes. Traffic is also developing along the FERRMED Corridor, and even more towards the East (Russia/CIS/China) and Southeast (Balkans/Turkey).

**Details of 2013:** The UIRR companies achieved a slight increase in consignments both on domestic and border crossing relations. 2013 recorded an increase for all type of loading units, and in particular the transportation of semi-trailers (40,000 craneable semi-trailers more than 2012).

Due to a shorter average distance in Italy, more tonne-kilometres were realised on distances between 300 km and 600 km. The best performing relations in 2013 were as follows:

- Germany vv Italy +5%
- Italy vv Netherlands +9%
- Belgium vv Germany +16%
- Belgium vv Italy +27%

Services launched in 2012 that showed significant growth (in total 20,000 additional consignments)

- Spain vv France +1,200%
- Spain vv Italy +2,322%
- Italy vv Poland +645%

Declines have been recorded on several relations, especially in Central Europe

- Austria vv Germany -20%
- Austria vv Slovenia -24%
- France vv Italy -12%
- Czech Republic vv Slovenia -21%

### 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

<b>C</b>	consignments
<b>CT</b>	container
<b>RoLa</b>	rolling motorway
<b>SB</b>	swap-body
<b>ST</b>	semi-trailer
<b>t</b>	tonnes
<b>TEU</b>	twenty-foot equivalent unit
<b>tkm</b>	tonne-kilometre

# Country Matrix

Relations		Consignment	Consignment-km	Average Distance (km)	Average Weight (t)	Gross Weight (t)	Tonne-km	ILU type as % of consignments			
from	to							SB/CT	SB/CT	ST	RoLa
country								1,000 tkm	<8,30m	>8,30m	
AT	BE	887	1,056,345	1,163	13	11,823	14,080	2%	98%		
BE	AT	1,886	2,185,856	1,159	25	47,473	55,021	1%	99%		
AT	DE	25,081	23,144,634	923	24	602,234	554,298	22%	44%	34%	
DE	AT	30,180	28,404,557	941	26	774,698	728,827	30%	42%	28%	
AT	IT	4,996	950,912	190	21	107,054	20,375	62%	35%	3%	
IT	AT	7,479	2,496,831	334	26	193,511	70,120	15%	10%	2%	73%
AT	NL	875	891,341	1,019	23	20,201	20,578	39%	61%		
NL	AT	755	950,057	1,259	23	17,420	21,935	57%	43%		
AT	SI	11,204	3,118,970	278	23	258,286	71,902	100%			
SI	AT	28,736	9,142,984	318	36	1,021,257	337,305	22%			78%
AT	TR	440	804,768	1,829	26	11,298	20,664		100%		
TR	AT	438	797,768	1,821	10	4,244	7,730		100%		
BA	SI	5	2,492	498	2	12	6	100%			
SI	BA	12	1,572	131	23	275	36	100%			
BE	BG	78	179,235	2,298	27	2,114	4,858	98%	2%		
BG	BE	55	213,085	2,291	3	187	724	69%	31%		
BE	CH	16,386	10,687,307	652	23	371,110	242,092	63%	37%		
CH	BE	16,844	9,937,047	590	14	233,813	137,952	50%	50%		
BE	CZ	851	807,599	949	32	27,654	26,244			100%	
CZ	BE	856	812,344	949	16	13,367	12,685			100%	
BE	DE	17,851	8,859,983	496	20	352,000	190,524	42%	58%		
DE	BE	24,257	13,051,658	538	19	459,381	244,309	33%	60%	7%	
BE	ES	12,137	17,468,493	1,439	28	335,541	482,880	31%	69%		
ES	BE	10,267	16,240,748	1,582	20	204,779	321,833	37%	63%		
BE	FR	33,364	17,508,385	525	16	532,858	279,537	34%	66%		
FR	BE	15,358	8,030,942	523	17	254,488	132,995	50%	50%		
BE	GR	119	349,721	2,939	25	2,989	8,822	100%			
GR	BE	57	286,446	2,677	4	238	1,195	88%	12%		
BE	HU	5	11,716	1,302	7	32	84	100%			
HU	BE	105	127,460	1,169	11	1,137	1,386	4%	96%		
BE	IT	104,842	105,001,173	1,002	25	2,595,634	2,632,484	22%	67%	11%	
IT	BE	98,969	92,127,322	931	21	2,069,148	1,880,110	19%	68%	13%	
BE	NL	4	557	159	9	32	5	100%			
BE	PL	3,860	7,272,628	1,884	28	109,005	205,375	45%	55%		
PL	BE	3,579	4,874,113	1,362	20	69,804	95,076	46%	54%		
BE	RO	7,358	11,868,454	1,613	23	166,858	269,142		100%		
RO	BE	5,331	8,247,057	1,547	17	91,966	142,271	5%	95%		
BE	RU	801	1,551,510	1,938	30	23,654	45,846	100%			
RU	BE	500	725,550	1,451	9	4,388	6,368	99%	1%		
CH	DE	22,821	13,972,504	612	16	365,261	228,597	49%	21%	30%	
DE	CH	26,904	17,145,378	637	24	657,287	416,725	55%	20%	24%	
CH	DK	2	1,703	1,135	11	16	19	33%	67%		
DK	CH	1	1,135	1,135	24	24	27	100%			
CH	ES	87	157,939	1,826	24	2,079	3,797	100%			
CH	FR	185	245,887	1,329	26	4,806	6,388	100%			
CH	IT	2,599	780,333	300	21	54,739	16,438	31%	13%	56%	
IT	CH	4,979	1,546,368	311	26	127,958	39,741	40%	23%	38%	
CH	NL	9,081	7,100,951	782	18	165,354	129,306	48%	52%		
NL	CH	10,913	7,392,831	677	19	208,399	141,183	52%	48%		
CH	NO	1	1,798	1,798	14	14	26			100%	
CH	SE	194	227,738	1,174	23	4,467	5,244	2%		98%	
SE	CH	51	73,362	1,453	27	1,345	1,954	100%			
CZ	DE	9,000	5,804,497	645	21	187,423	120,884	48%	8%	44%	
DE	CZ	12,875	9,089,642	706	25	320,643	226,380	29%	10%	61%	
CZ	IT	2,260	2,127,095	941	26	57,714	54,320	17%		83%	
IT	CZ	2,444	2,333,262	955	22	53,546	51,120	19%	5%	76%	
CZ	PL	69	51,543	747	28	1,914	1,430	3%	97%		
CZ	SI	6,238	5,329,810	854	14	86,477	73,887	100%			
SI	CZ	5,974	5,105,739	855	13	80,458	68,764	100%			
DE	DK	1,540	1,371,347	891	28	43,713	38,938	49%	43%	8%	
DK	DE	1,822	956,395	525	5	9,480	4,976	32%	68%		
DE	ES	18,785	28,914,476	1,539	26	492,365	757,142	76%	23%	1%	
ES	DE	17,978	29,069,871	1,617	22	400,520	647,209	74%	25%	1%	
DE	FI	116	191,780	1,660	25	2,889	4,797	49%	49%	2%	
FI	DE	128	178,204	1,398	5	690	965	27%	73%		
DE	FR	9,594	10,511,796	1,096	26	251,394	275,458	55%	43%	2%	
FR	DE	10,130	10,387,469	1,025	16	166,512	170,744		98%	2%	
DE	GR	173	384,303	2,228	26	4,496	10,017	74%	13%	13%	
GR	DE	107	246,145	2,311	15	1,613	3,728	55%	19%	26%	
DE	HR	1	1,472	1,472	26	26	38	100%			
HR	DE	12	15,039	1,308	11	128	167	13%	87%		
DE	HU	10,795	14,254,482	1,321	28	299,861	396,027	35%	21%	44%	
HU	DE	9,604	12,173,464	1,268	21	205,401	259,746	24%	26%	50%	

Relations		Consignment	Consignment-km	Average Distance (km)	Average Weight (t)	Gross Weight (t)	Tonne-km	ILU type as % of consignments			
from	to							SB/CT	SB/CT	ST	RoLa
country								1.000 tkm	<8,30m	>8,30m	
DE	IT	295,303	231,506,363	784	28	8,244,882	6,408,204	30%	19%	34%	17%
IT	DE	282,369	222,530,952	788	23	6,353,501	4,752,089	30%	21%	32%	17%
DE	NL	57,231	21,705,726	379	21	1,175,654	458,708	47%	52%	1%	
NL	DE	53,777	20,893,337	389	18	952,209	377,173	40%	60%		
DE	NO	125	171,851	1,375	27	3,400	4,675	90%	10%		
NO	DE	7	8,668	1,238	9	62	77	71%	29%		
DE	PL	28,583	28,779,202	1,007	21	597,698	605,092	41%	57%	2%	
PL	DE	24,061	22,380,900	930	14	342,772	318,199	38%	60%	2%	
DE	PT	586	1,292,490	2,207	28	16,667	36,792	76%	24%		
PT	DE	331	914,084	2,762	9	3,045	8,409	62%	38%		
DE	RO	864	1,104,333	1,279	28	24,536	31,250	99%	1%		
RO	DE	289	407,797	1,414	8	2,327	3,287	97%	3%		
DE	RU	830	1,351,451	1,629	28	23,055	37,562	100%			
RU	DE	567	823,736	1,453	9	5,030	7,308	92%	8%		
DE	SE	6,411	7,015,085	1,094	26	165,150	180,712	55%	9%	36%	
SE	DE	4,613	4,211,293	913	20	91,383	83,434	33%	12%	55%	
DE	SI	3,640	3,794,075	1,042	32	117,001	121,953	79%	15%	6%	
SI	DE	5,294	4,010,417	758	8	44,099	33,407	100%			
DE	SK	239	470,144	1,971	51	12,189	24,027	97%	3%		
DE	TR	1,003	2,225,175	2,220	28	28,089	62,347	77%	23%		
TR	DE	546	1,126,851	2,066	14	7,616	15,733	70%	30%		
DE	YO	1	846	1,691	6	3	5	100%			
DK	IT	7,040	8,250,541	1,172	28	194,313	227,742	24%	23%	53%	
IT	DK	9,283	13,720,339	1,478	26	239,593	354,309	16%	20%	64%	
ES	FR	7,589	6,996,238	922	11	82,595	69,223		100%		
FR	ES	7,202	6,755,443	938	14	100,001	93,800		100%		
ES	IT	1,846	1,967,836	1,066	28	51,512	54,911	75%	25%		
IT	ES	1,521	1,557,318	1,024	21	32,172	32,941	69%	31%		
FR	IT	20,861	18,712,891	897	26	547,840	491,427		99%	1%	
IT	FR	23,107	20,320,551	879	21	477,002	419,481	13%	86%	1%	
HR	HU	431	251,704	584	5	1,981	1,157	2%	98%		
HU	HR	779	458,831	589	3	1,990	1,172	8%	92%		
HR	RS	144	91,152	633	26	3,683	2,332	31%	69%		
RS	HR	144	91,152	633	3	463	293	31%	69%		
HR	SI	86	17,458	203	16	1,378	280	59%	41%		
SI	HR	75	13,125	175	2	118	21	100%			
HU	NL	573	740,318	1,292	16	8,980	11,602	68%	32%		
NL	HU	1,922	2,459,487	1,280	24	45,640	58,403	80%	20%		
HU	SI	12,739	8,696,915	683	14	181,582	123,966	100%			
SI	HU	14,627	10,089,266	690	15	218,688	150,845	100%			
IT	HU	133	44,954	338	8	1,051	355	100%			
IT	LU	2,940	2,102,100	715	7	21,062	15,059	100%			
LU	IT	2,952	2,110,680	715	31	92,810	66,359	100%			
IT	NL	41,655	48,995,733	1,176	18	750,277	884,153	43%	54%	3%	
NL	IT	38,267	45,369,970	1,186	25	963,516	1,143,314	42%	56%	2%	
IT	PL	2,519	2,686,602	1,067	21	54,015	57,609	24%	76%		
PL	IT	1,899	2,188,736	1,153	15	29,250	33,722	7%	93%		
IT	RU	5	8,087	1,617	21	107	173	40%	60%		
RU	IT	2	1,827	1,218	9	13	16	100%			
IT	SE	4,833	6,974,493	1,443	24	116,634	168,314	66%	30%	4%	
SE	IT	8,351	11,196,585	1,341	29	239,116	321,714	42%	18%	39%	
MK	SI	3	3,186	1,062	3	9	10	100%			
SI	MK	6	5,694	949	5	31	29	100%			
NL	RO	317	720,749	2,277	30	9,466	21,556	97%	3%		
RO	NL	177	407,549	2,303	7	1,187	2,734	100%			
NL	RU	391	866,254	2,215	32	12,394	27,459	100%			
RU	NL	160	412,810	2,580	8	1,340	3,457	100%			
PL	RU	291	416,972	1,433	29	8,348	11,962	100%			
RU	PL	161	310,548	1,935	11	1,797	3,477	100%			
RO	HU	22	17,081	776	8	173	135	100%			
RO	SI	5	7,200	1,440	4	20	29	100%			
SI	RO	5	5,690	1,138	27	136	155	100%			
RS	SI	103	55,047	534	3	352	188	100%			
SI	RS	146	63,014	432	20	2,857	1,233	100%			
RU	HU	5	8,250	1,833	7	34	62	100%			
SI	IT	1,215	321,465	265	3	3,690	976	100%			
SI	SK	18,596	14,838,678	798	13	234,570	187,175	100%			
SK	SI	14,012	11,478,350	819	7	104,109	85,284	100%			
SI	TR	848	1,294,048	1,526	27	22,769	34,745	100%			
TR	SI	925	1,411,550	1,526	9	8,591	13,110	100%			
TR	BE	171	714,279	2,413	4	699	2,929	74%	26%		
<b>TOTAL</b>		<b>1,701,999</b>	<b>1,430,288,896</b>	<b>840</b>	<b>23</b>	<b>38,331,311</b>	<b>32,195,886</b>	<b>37%</b>	<b>38%</b>	<b>18%</b>	<b>7%</b>

# Member companies

## ADRIA KOMBI



Tivolska 50  
SLO - 1000 Ljubljana  
Tel.: +386 1 23 45 280  
Fax: +386 1 23 45 290  
[infor@adriakombi.si](mailto:infor@adriakombi.si)  
[www.adriakombi.si](http://www.adriakombi.si)

Activities: UCT - RoLa - RSO - RH  
Agencies: SI - TR  
Total traffic: 308,000 TEU  
Revenue: € 42 million

## ALPE ADRIA



Via S. Caterina da Siena, 1  
I - 34122 Trieste  
Tel.: +39 040 63 92 33  
Fax: +39 040 36 48 42  
[amministrazione@alpeadria.com](mailto:amministrazione@alpeadria.com)  
[www.alpeadria.com](http://www.alpeadria.com)

Activities: UCT - RoLa  
Agency: IT  
Total traffic: 85,000 TEU  
Revenue: € 23 million

## BOHEMIAKOMBI



Opletalova 6  
CZ - 113 76 Praha 1  
Tel.: +420 2 42 444 560  
Fax: +420 2 42 444 924  
[info@bohemiakombi.cz](mailto:info@bohemiakombi.cz)  
[www.bohemiakombi.cz](http://www.bohemiakombi.cz)

Activity: UCT  
Agency: CZ  
Total traffic: 26,000 TEU  
Revenue: n/a

## CEMAT



Via Valtellina 5-7  
I - 20159 Milano  
Tel.: +39 02 668 951  
Fax: +39 02 668 00 755  
[info@cemat.it](mailto:info@cemat.it)  
[www.cemat.it](http://www.cemat.it)

Activities: UCT - RSO - ECM  
Agency: IT  
Total traffic: 776,000 TEU  
Revenue: € 199 million

## COMBIBERIA



c/Rafael Herrera, 11; 2º, Pta 203  
E - 28036 Madrid  
Tel.: +34 91 314 98 99  
Fax: +34 91 314 93 47  
[combiberia.madrid@combiberia.com](mailto:combiberia.madrid@combiberia.com)  
[www.combiberia.com](http://www.combiberia.com)

Activity: UCT  
Agency: ES  
Total traffic: 63,000 TEU  
Revenue: n/a

## CROKOMBI



Heinzelova ulica 51  
HR - 10000 Zagreb  
Tel.: +385 1 61 51 867  
Fax: +385 1 61 51 869  
[crokombi@crokombi.hr](mailto:crokombi@crokombi.hr)  
[www.crokombi.hr](http://www.crokombi.hr)

Activity: UCT  
Agency: HR  
Total traffic: 3,200 TEU  
Revenue: n/a

## HUPAC



Viale R. Manzoni 6  
CH - 6830 Chiasso  
Tel.: +41 91 695 28 00  
Fax: +41 91 695 28 01  
[info@hupac.ch](mailto:info@hupac.ch)  
[www.hupac.ch](http://www.hupac.ch)

Activities: UCT - TTM - RSO - ECM - RU - CA  
Agencies: BE - CH - DE - IT - NL - RU  
Total traffic: 1,096,000 TEU  
Revenue: € 377 million

## INTERFERRYBOATS



Houtdok 25 A  
B - 2030 Antwerp  
Tel.: +32 3 270 27 00  
Fax: +32 3 226 26 26  
[info@interferryboats.com](mailto:info@interferryboats.com)  
[www.interferryboats.com](http://www.interferryboats.com)

Activities: UCT - TTM - ECM - CA - RH  
Agencies: BE - DE - TR  
Total traffic: 545,000 TEU  
Revenue: n/a

## KOMBIVERKEHR



Zum Laurenburger Hof 76  
D - 60594 Frankfurt  
Tel.: +49 69 79 50 50  
Fax: +49 69 79 50 51 19  
[info@kombiverkehr.de](mailto:info@kombiverkehr.de)  
[www.kombiverkehr.de](http://www.kombiverkehr.de)

Activities: UCT - TTM - RSO - ECM - RU  
Agencies: DE - ES - IT - NL - PL  
Total traffic: 1,407,000 TEU  
Revenue: € 424 million

**NAVILAND CARGO**



15 - 17 Allées de l'Europe  
F - 92588 Clichy-la-Garenne Cedex

Tel.: + 33 1 41 05 33 01  
Fax: + 33 1 40 87 08 20

[contact@naviland-cargo.com](mailto:contact@naviland-cargo.com)  
[www.naviland-cargo.com](http://www.naviland-cargo.com)

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

**NOVATRANS**



15 - 17 Allées de l'Europe  
F - 92588 Clichy-la-Garenne Cedex

Tel.: +33 1 40 87 97 00  
Fax: +33 1 40 87 97 65

[info@novatrans.eu](mailto:info@novatrans.eu)  
[www.novatrans.eu](http://www.novatrans.eu)

Activities: UCT - TTM - RSO  
Agency: FR  
Total traffic: 278,000 TEU  
Revenue: € 80 million

**POLZUG**



Container Terminal Burchardkai  
Bürogebäude 1

D - 21129 Hamburg  
Tel.: +49 40 74 11 45 0  
Fax: +49 40 74 11 45 45

[hamburgpolzug.de](http://hamburgpolzug.de)  
[www.polzug.de](http://www.polzug.de)

Activities: UCT - TTM - CA - RH  
Agencies: DE - PL - UA - GE - AZ  
Total traffic: 139,000 TEU  
Revenue: € 33 million

**RALPIN**



Belchenstrasse 3  
CH - 4601 Olten

Tel.: +41 58 822 88 88  
Fax: +41 58 822 88 80

[info@ralpin.com](mailto:info@ralpin.com)  
[www.ralpin.com](http://www.ralpin.com)

Activity: RoLa - ECM  
Agencies: CH - DE - IT  
Total traffic: 217,000 TEU  
Revenue: n/a

**ROCOMBI**



Bld. Dinicu Golescu 38  
RO - 010873 Bucharest

Tel.: +40 21 312 23 14  
Fax: +40 21 312 17 74

[info@rocombi.ro](mailto:info@rocombi.ro)  
[www.rocombi.ro](http://www.rocombi.ro)

Activity: TTM - UCT  
Agency: RO  
Total traffic: 7,900 TEU  
Revenue: n/a

**Activities - glossary:**

UCT: Unaccompanied Combined Transport  
RoLa: 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

**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.

# Terminal Activities

## TRANSHIPMENT TERMINALS MANAGED BY UIRR MEMBER COMPANIES

more information on <http://www.uirr.com/en/our-members/european-ct-terminals.html>

Name of terminal	UIRR code	City	Modes connected				Total turnover (units)	Technical data		
			Rail	Road	IWW**	RoLa		Total surface	Number of cranes (gantry + mobile)	Number of tracks
<b>BELGIUM</b>										
Antwerp HTA Quai 468	697	Antwerp	•	•			87,348	53,000	6	5
ATO		Antwerp	•	•	•		102,355	93,598	6	2
Cirkeldijk	119	Antwerp	•	•			120,435	52,000	6	4
Euroterminal	113	Genk	•	•			33,907	80,000	3	4
Main HUB*	107	Antwerp	•	•			93,288	202,497	12	8
Zomerweg	114	Antwerp	•	•			56,690	77,000	6	4
<b>FRANCE</b>										
Avignon	299	Avignon	•	•	•		n/a	38 000	4	6
Cognac		Cognac	•	•			n/a	1,500	2	
Gevrey		Gevrey	•	•			n/a			
Hourcade	241	Bordeaux	•	•			n/a			
Marseille	237	Marseille	•	•			n/a	15,000	3	6
Miramas	021	Marseille	•	•	•		n/a		2	2
Mouguerre	222	Mouguerre	•	•	•		n/a		2	4
Noisy-Le-Sec	200	Paris	•	•	•		n/a	72,500	5	10
Toulouse	245	Toulouse	•	•			n/a	32,000	2	6
Valenton	203	Paris	•	•	•		n/a	34,700	2	3
Vénissieux	270	Lyon	•	•			n/a	32,300	7	5
<b>GERMANY</b>										
Singen	574	Singen	•	•			79,626	50,000	2	5
<b>ITALY</b>										
Busto Arsizio Gallarate	409	Milano	•	•			364,252	242,800	14	11
Novara RoLa	252	Novara		•		•	98,593			
<b>POLAND</b>										
Hub Terminal Poznan	953	Gadki	•	•			128,333	320,000	6	5
Dąbrowa Górnicza	072	Dąbrowa Górnicza	•	•			48,836	225,000	4	5
Kontenerowy Pruszków	958	Pruszkow	•	•			39,182	33,000	8	3
Kontenerowy Wrocław	962	Wrocław	•	•			32,556	45,000	6	4
<b>ROMANIA</b>										
Bucuresti Sud Titan		Bucarest	•	•			n/a	10,000	3	4
<b>SWITZERLAND</b>										
Aarau	600	Aarau	•	•			38,241	20,000	3	5
Basel Weil	599	Basel	•	•			10,032		6	6
Basel Wolf	602	Basel	•	•			48,060	17,000	6	2
Chiasso Z4	603	Chiasso	•	•			4,173	7,000	1	2
Lugano Vedeggio	605	Lugano		•		•	9,974	2,000	1	2

\* operations suspended in September 2013 - more information on pages 10-11

\*\* IWW = inland waterway





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