

CONTEMPORARY CHALLENGES IN COMBINED TRANSPORT FROM A POLICY AND BUSINESS PERSPECTIVE

**UIC COMBINED TRANSPORT
OCTOBER 12TH, 2023**

WEBINAR START AT 10.00H

Program

10.00 – 10.15 Introduction

Barbara Chevalier – CEO CFL Multimodal

Philip Van den bosch – UIC

10.15 – 11.00 Presenting the current trends on Combined Transport in Europe

Trends & evolutions on CT in Europe

Philip Van den bosch – Deputy Director Freight - UIC

The Role of Combined transport in current logistics operations and how it has changed (or not)

Eric Feyen – Technical Director - UIRR

The new handbook on Combined Transport

Eric Lambert – Former chairman Combined Transport Group - UIC

11.00 – 11.30 Combined Transport in a new business context

Presentation of the new study on direct shipment between rail and waterborne transport

UIC & Louis Descamps - University of Antwerp

Role of combined transport from a customer perspective

Tobia Mazzi - Transportation Purchasing Senior Manager - Arcese Trasporti

11.30 – 12.00 Combined Transport in a new legislative and political context

Presentation of the latest legislative initiatives

Jacques Dirand - Head of Rail Freight Services – CER

Stakeholder debate on the new legislative era

Combined transport in the new Eastern Europe reality

Andrius Sinkevičius - Business Development - LTG Cargo

12.00 – 12.15 Conclusions

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**PRESENTING THE CURRENT TRENDS ON COMBINED
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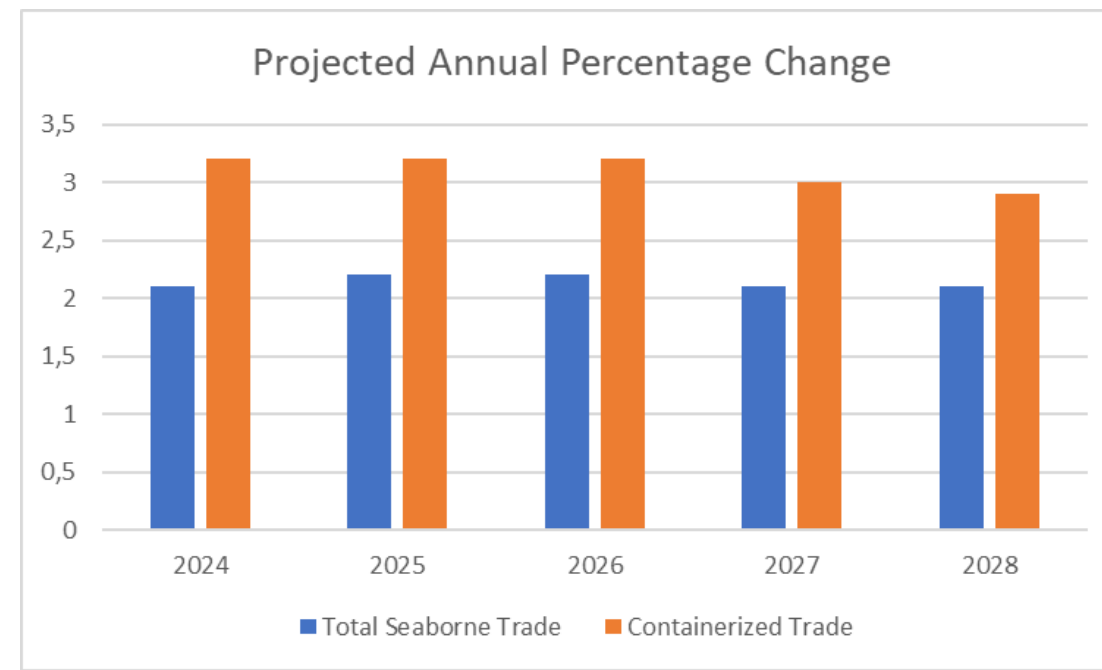
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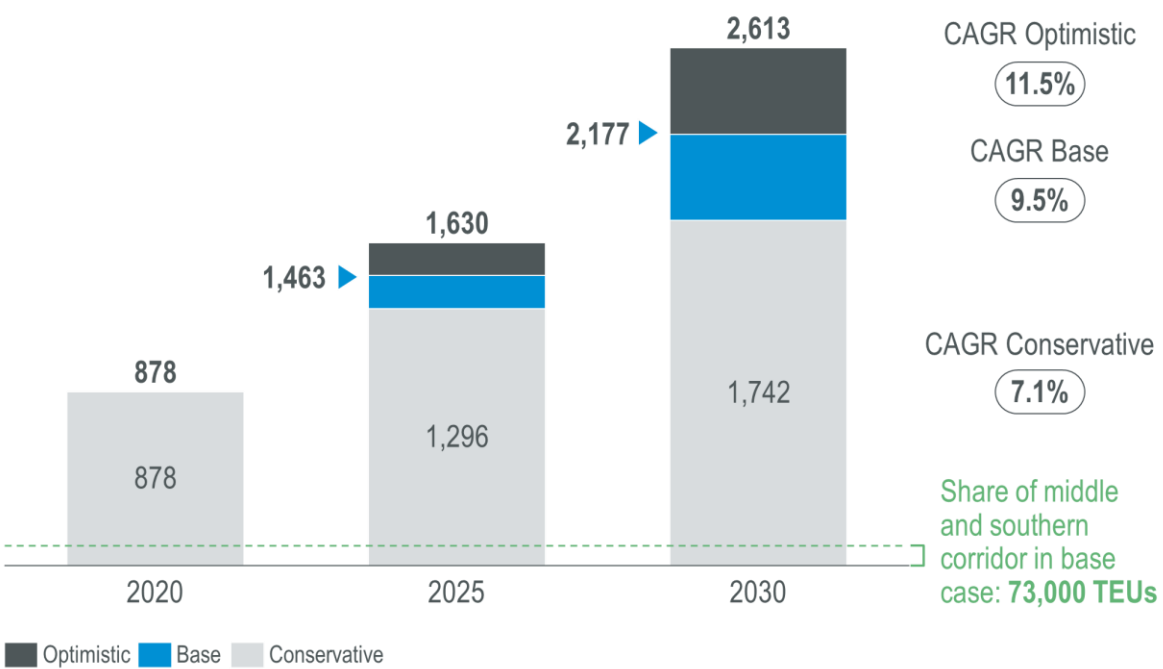
Combined Transport (CT) on a turning point

Increasing containerization



Source: UNCTAD secretariat calculations, July 2023 in "Review of Maritime Transport 2023"

Growing trade through new corridors



Source: UIC Study on the Silk Road, Middle & Southern Corridor, April 2021

Emphasize on greening transport with a number of positive policy intentions

GREENING FREIGHT
For more economic gain with less environmental impact

6 million people work in the freight sector. 30% of transport CO2 emissions come from freight transport.

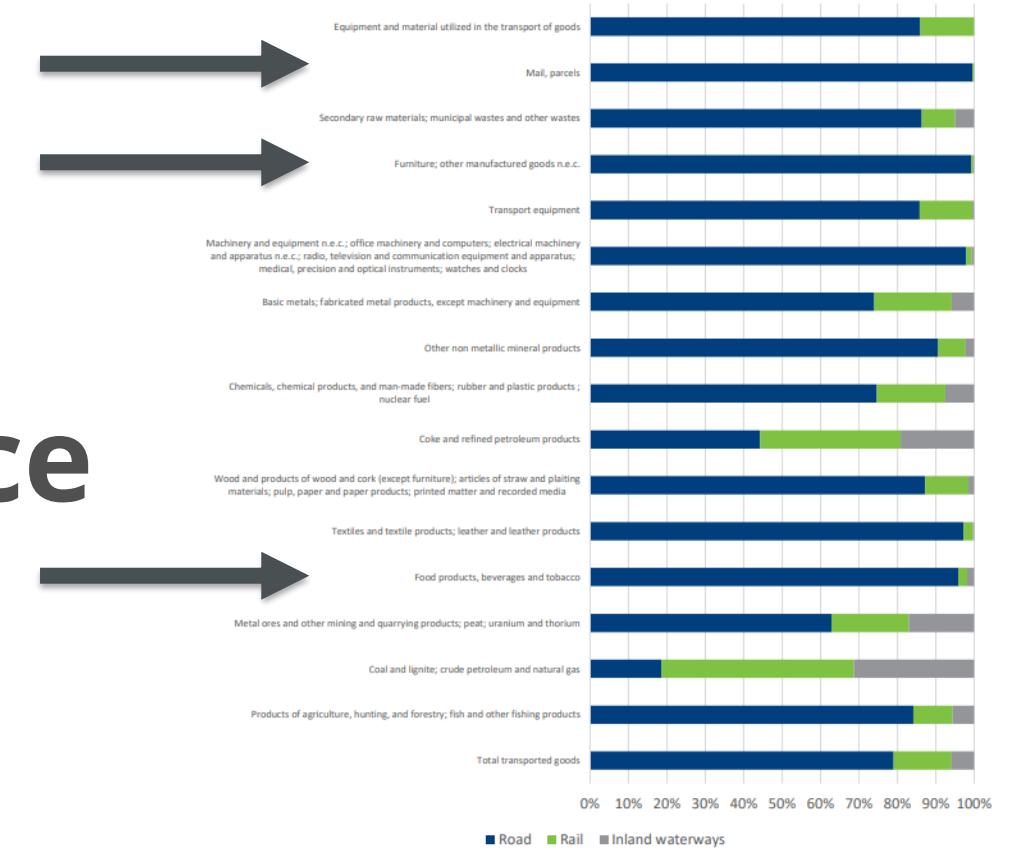
KEEPING TRACK OF EMISSIONS
The Commission will be a harmonised framework to standardise emissions and emissions from transport services, across modes and national networks. Available data on these emissions will enable us to benchmark their services, and where companies and business to make informed choices on transport and delivery options.

INCREASING RAIL CAPACITY
The measures proposed today aim at better managing rail traffic, also during periods of growing rail use of our international operations. In addition, for our international operations, we will also explore the possibility of increasing the capacity of our rail network. This will not only make rail freight a more attractive option but also improve the travel experience of rail passengers.

REDUCING ROAD FREIGHT EMISSIONS
The proposed new rules will support the uptake of alternative fuels and other measures to reduce CO2 emissions from heavy-duty road transport. The measures will also reduce the overall CO2 impact of heavy-duty road transport and encourage energy and operational efficiency.

Reduction in average load size

Figure 9. Modal split in freight transport per commodity group in the EU-28, 2019



E-commerce

New geopolitical context

Increasing protectionism

Changes in political agenda



Political context

Recent (European) policy environment looked promising

- Revision of the W&D directive
- Revision of the Combined Transport directive
- Revision of the Train Drivers directive
- Other rail related initiatives (capacity regulation, TEN-T...)

Support for Eurasian trade

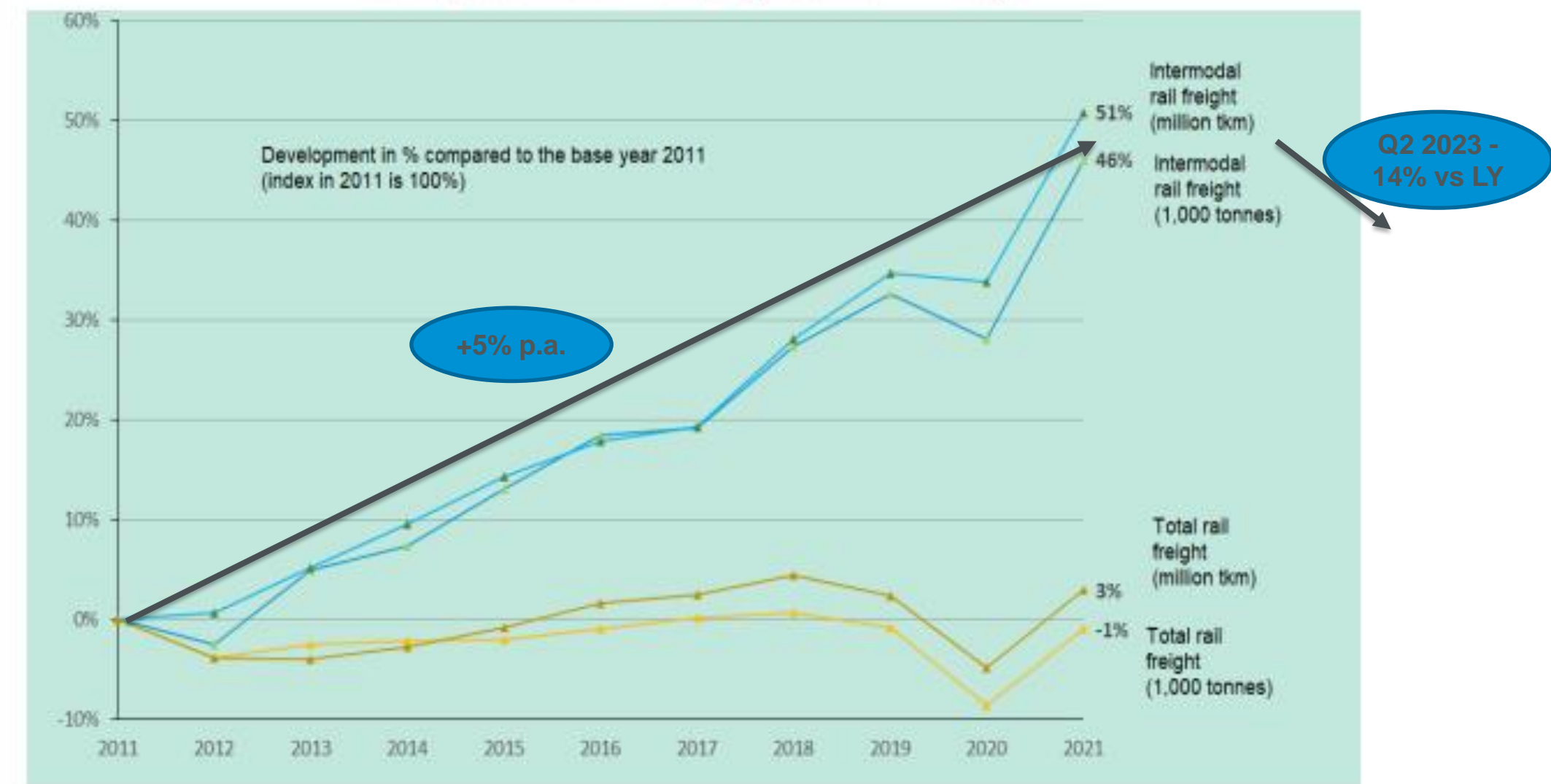
Other regions looking into corridor development, often in a CT context

- GCC attempts to develop a Southern Corridor through a 2200 km railway network
- Turkey looking at doubling its network by an investment of around \$ 200 bln
- India getting interested rail development (strategic partnership with Europe to develop a Southern Corridor)
- First initiatives in a number of African countries with non-existing rail sector

Economic & business context

- Challenging times
- Rail did not fully recover from recent events and is facing new challenges
- First economic relaxation increases price competitiveness and competition between modes
- Road business (often via fuel) remains heavily subsidized
- CT was until recent a heaven for growth -> now also suffering
- CT a solution for challenges in other chains of the supply chain

Figure 6: Development of total rail freight performance vs. rail transport of goods in intermodal transport units in Europe (Index 2011 = 100)



Source: UIC/UIRR Combined Transport Report 2022

Technical context

○ Strive for efficiency



○ Alternative loading techniques



○ To new businesses

