

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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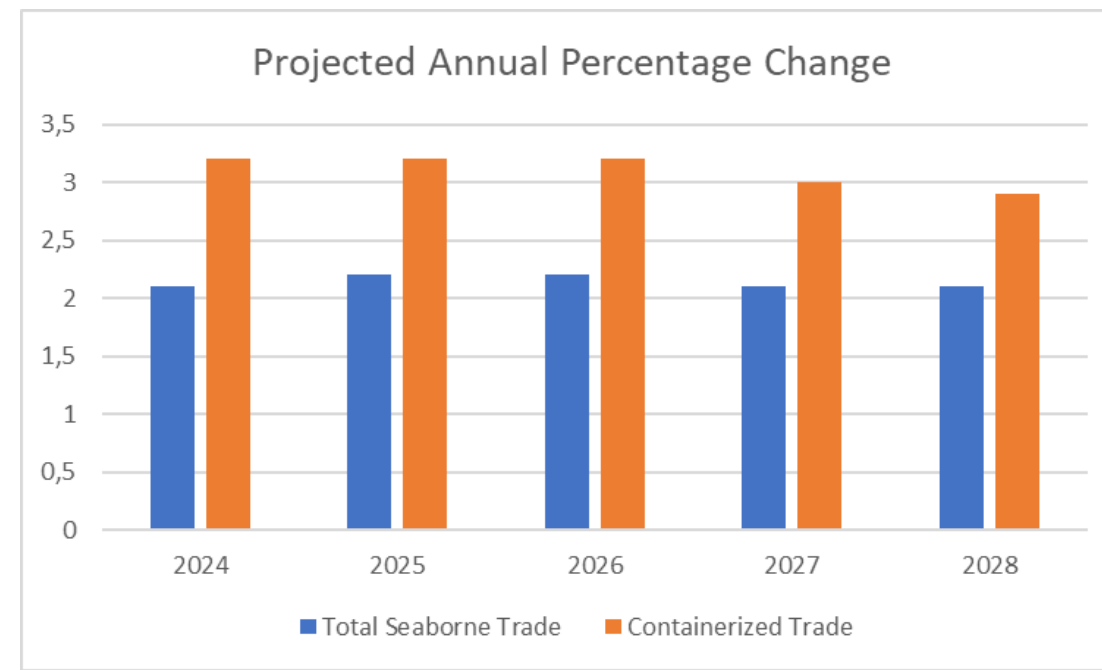
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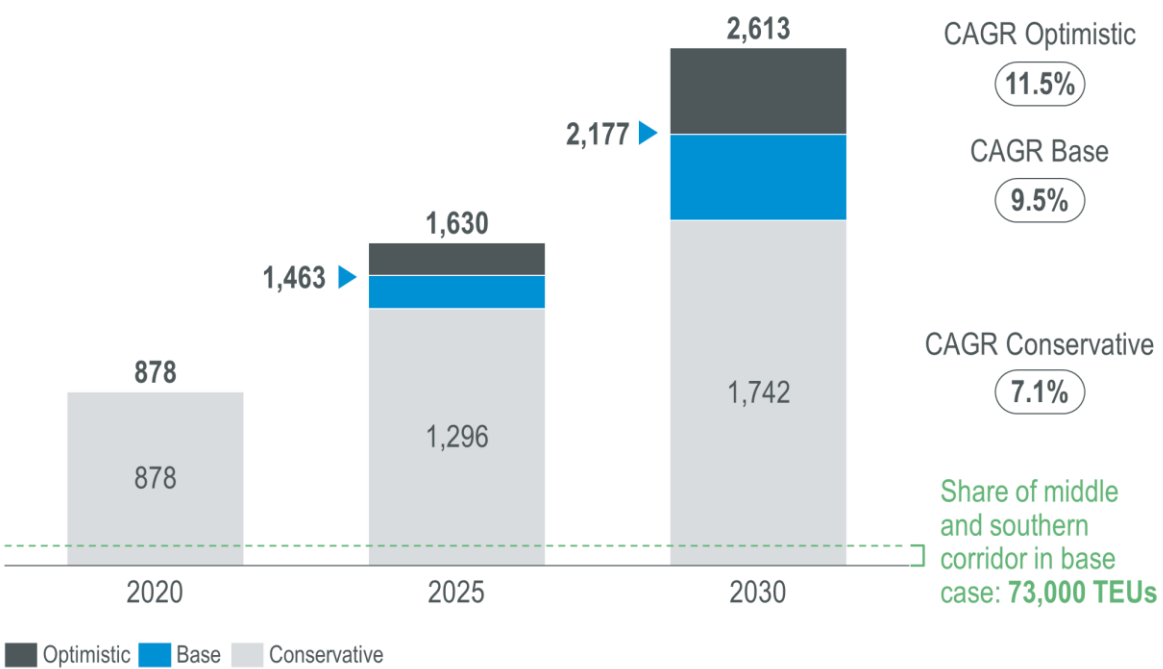
Combined Transport (CT) on a turning point

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.

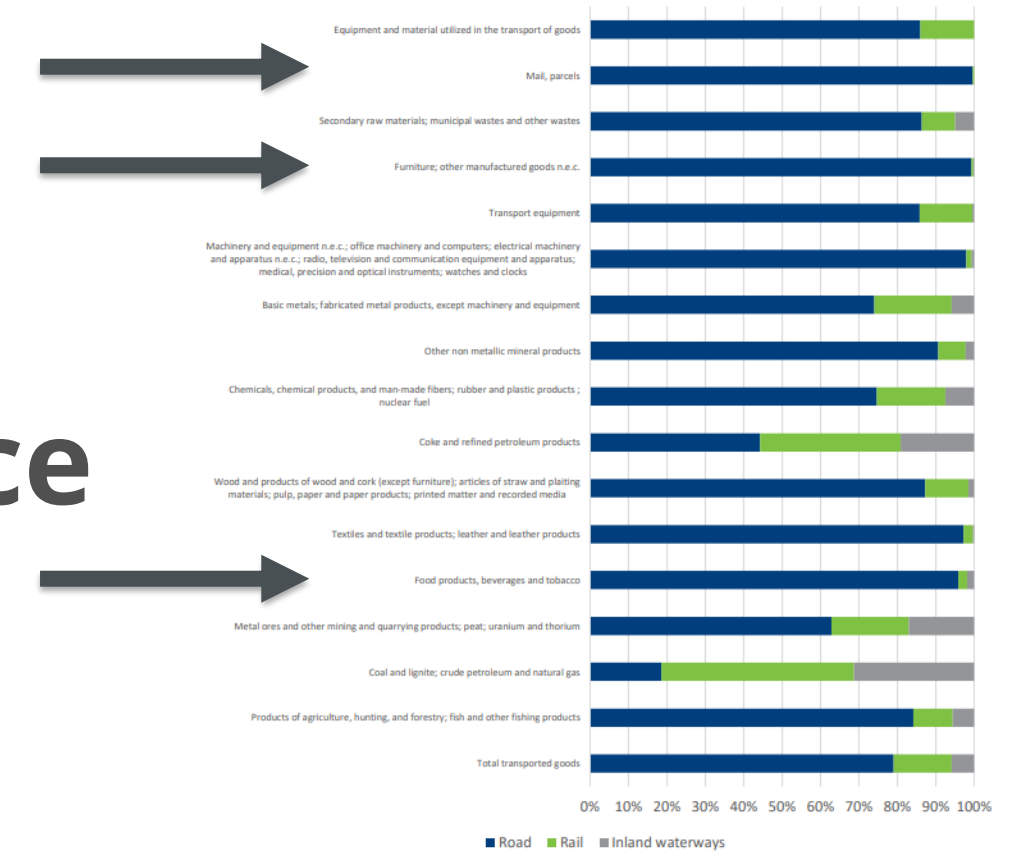
KEEPING TRACK OF EMISSIONS
The Commission will be a harmonised framework to standardise emissions data on freight transport across modes and national networks. Available data on these emissions will enable us to benchmark their services and allow companies and business to make informed choices on transport 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, the proposed new rules will support the up take of alternative services and minor emissions from transport services across modes and national networks. Available data on these emissions will enable us to benchmark their services and allow companies and business to make informed choices on transport and delivery options.

REDUCING ROAD FREIGHT EMISSIONS
The proposed new rules will support the up take of alternative services and minor emissions from transport services across modes and national networks. Available data on these emissions will enable us to benchmark their services and allow companies and business to make informed choices on transport and delivery options.

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

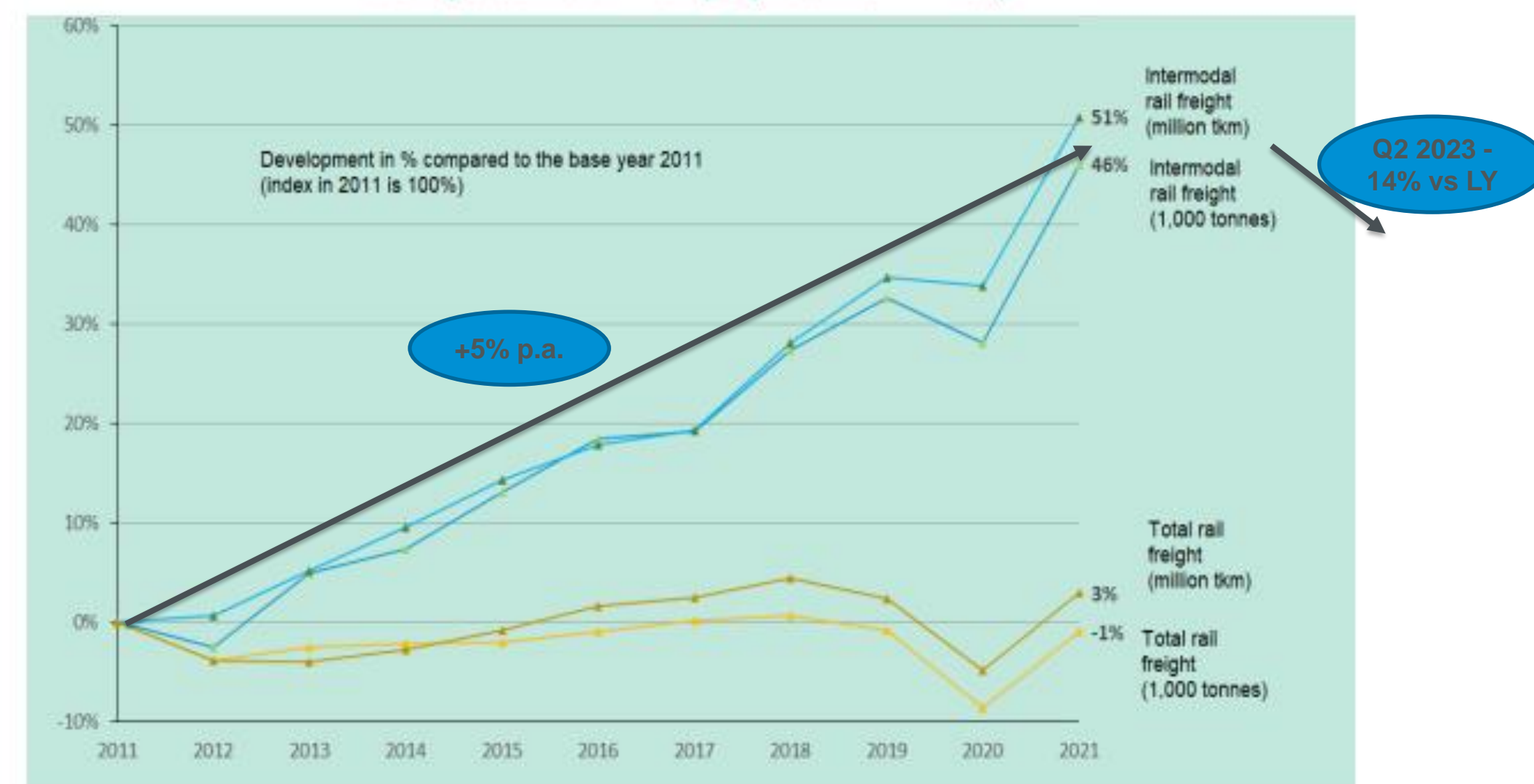
Other regions looking into corridor development, often in a CT context

- 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



UIC-CFL EVENT

THE ROLE OF COMBINED TRANSPORT IN CURRENT LOGISTICS OPERATIONS
AND HOW IT HAS CHANGED (OR NOT)

Agenda



- **UIRR galaxy, mission and vision**
- **Combined Transport**
 - Introduction
 - Past achievements
 - Current Performance and Deliveries
- **The CT4EU campaign**
- **Conclusion**



UIRR, the industry association of Combined Transport

An extended network of 100 = 51 members + 21 technology partners + 28 MoU peers

PARTNERS



MOU PEERS



UIRR OPERATORS



UIRR TERMINALS



INDUSTRY ASSOCIATION PEERS



GOVERNMENTAL BODIES



Mission and vision

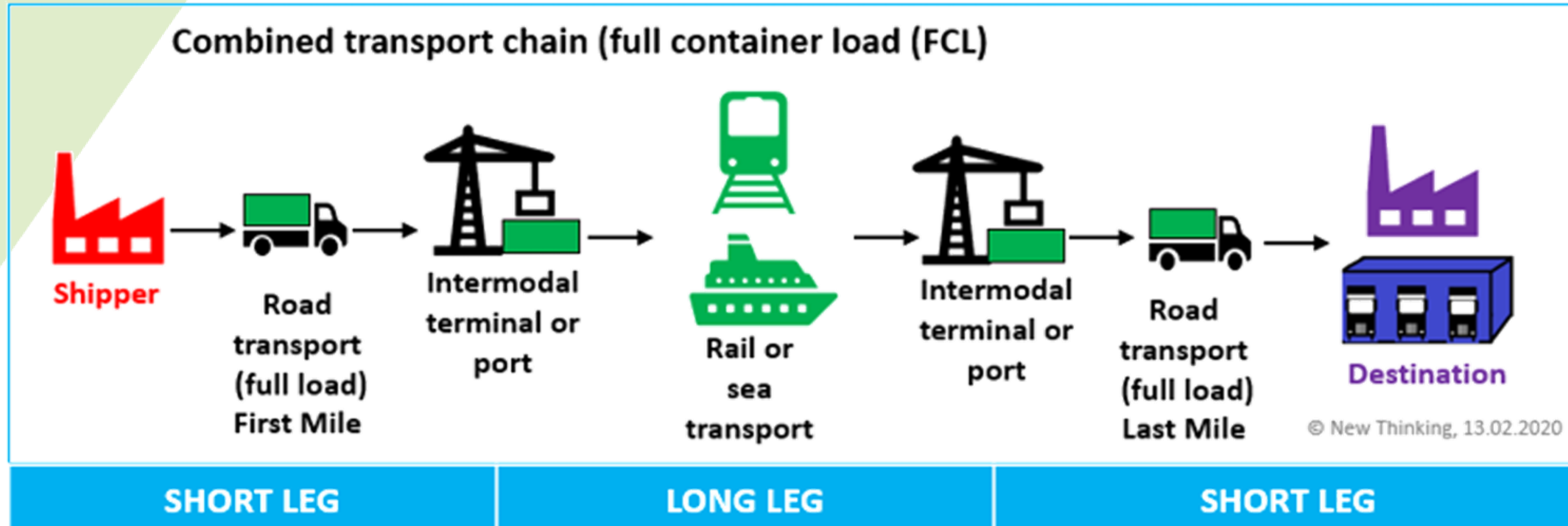


Zero-Carbon Combined Transport is the solution for well performing longer distance surface freight logistics in a carbon-neutral Europe



UIRR advances the development and actively promotes competitive zero-carbon Combined Transport for Europe

About Combined Transport



Road-Rail Combined Transport (CT) is a **system of freight forwarding** which is based on efficiently and economically inserting **electric rail into long-distance logistics chains** using **intermodal loading units (ILU)**.



Combined Transport: **current performance**

CT is the most dynamic transport solution for the sustainable door-to-door transport of any type of cargo in Europe...

- **10 million truckloads per year**
- **200,000 trains per year**
- **50% of the European rail freight (expressed in TKM)**
- **About 200 billion TKM per year**
- **Any types of cargo and standardised loading units**

Combined Transport **delivers** on several key EU priorities



- Improving **air quality**
- Reducing **noise pollution**
- **Decarbonising** long-distance freight transport
- Increasing **energy efficiency**
- **Decoupling from fossil fuels**
- **Decreasing road degradation, congestion and accidents**
- **Mitigating the long-distance truck driver shortage**

CT delivers a pathway to net zero



CT efficiently transforms non-fossil electricity into transport services on an industrial scale.

- The technology is here
- Zero carbon, door-to-door CT is already possible

CT delivers a greater energy efficiency and lower CO₂ emissions

KEY MESSAGE

Compared to a Euro6/Euro7 truck, **door-to-door CT** offers an **effective, affordable** and **low-risk** path to improving energy efficiency and reducing CO₂ emissions.

KEY FIGURES



CT delivers a reduced road infrastructure degradation

KEY MESSAGE & FIGURES

Steel-on-steel and steel-in-water always outperforms rubber-on-asphalt:

- Heavy truck axles are the number 1 cause of road- and bridge degradation.
- Rail, on the other hand, is built to support 22.5-tonne axles making it ideal to handle heavy loads

CT delivers less road congestion

KEY MESSAGE & FIGURES

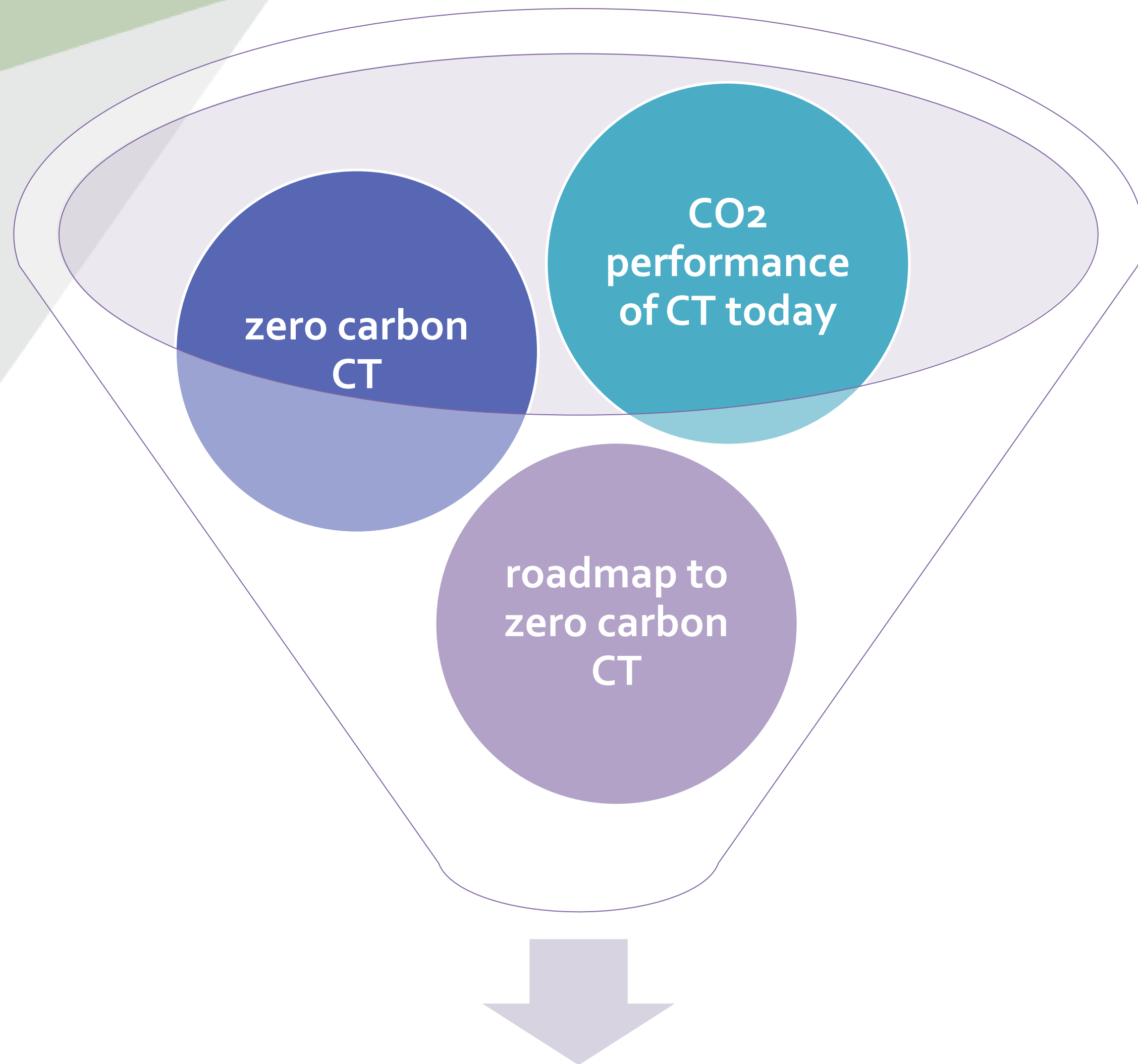
Alternatively powered trucks cause the same amount of road congestion as if the powertrain was fueled by diesel. Rail freight has the potential to double its market share by 2050. This requires a near three-fold increase in CT performance.

But the benefits of doing so are clear:

- 350 million less truck hours
- 170,000 fewer truck drivers

Fewer trucks on the road = less road congestion for everyone!

The CT4EU Campaign



Combined Transport is the low hanging fruit

CO₂ performance of CT today: an update of the previous study on the energy efficiency and carbon/pollutant emissions of Combined Transport

Zero-Carbon CT: what is ZCCT? – a study on the technical feasibility of using BEV trucks for the road legs, decarbonisation/electrification potential of terminals and their combination with electric rail freight

Roadmap to Zero-Carbon CT: how much investment and time is needed to proliferate ZCCT in Europe

Affordable, effective and low risk = Combined Transport, the solution to EU policy objectives

4 years of the CT4EU campaign: 2021-2024



2021-22: studies, design, website, social media presence, organization – www.ct4eu.eu - <https://www.linkedin.com/showcase/ct4eu/>

2023-24: dissemination actions by UIRR Members and Partners (60), MoU peers (30), Supporters (12 and growing), railway undertakings - altogether nearly 200 actors

EU BUBBLE

COORDINATOR: UIRR

Studies to underpin the messaging, visuals, methodology and event support

IN COLLABORATION BRUSSELS PEERS to address the European Parliament and the European Commission decisionmakers

MEMBER STATES

COORDINATOR: NATIONAL ASSOCIATIONS
MoU Peers of UIRR in the various Member States


NATIONAL DELEGATIONS TO COLLECTIVELY COMMUNICATE

consisting of Combined Transport operators, terminal managers, traction providing railway undertakings, shippers committed to intermodal and technology providers based on the specific Member State

Conclusions



- Combined Transport has delivered, delivers and will continue to deliver affordable and sustainable solutions for the logistics sector
- Combined Transport has a yearly growth average of 7% - 8% thanks to its capacity to adapt to the logistics needs (type of cargo & loading units) and to a significant extension of its network based on direct trains in Europe and beyond
- 'Sustainability' and 'energy efficiency' are key components of the CT strategy – consequences of the various greening initiatives and the energy crisis
- The CT₄Eu campaign as instrument to promote the benefits of CT for the logistics sector – please support us !



Thank you for your attention !
Eric Feyen – efeyen@uirr.com



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OF RAILWAYS

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www.uic.org



#UICrail

Thank you for your kind attention.