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 TRANSPORT IN EUROPE
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Combined Transport (CT) on a turning point

Increasing containerization

Growing trade through new corridors

Emphasize on greening transport with a number of positive policy intentions

Reduction in average load size

E-commerce

New geopolitical context

Increasing protectionism

Changes in political agenda

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

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

- 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

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

- Strive for efficiency
- Alternative loading techniques
- To new businesses
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THE ROLE OF COMBINED TRANSPORT IN CURRENT LOGISTICS OPERATIONS
AND HOW IT HAS CHANGED (OR NOT)

Bettembourg - 12.10.2023
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
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
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:
past achievements

Bettembourg
12.10.2023
UIC - CFL EVENT
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.
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

**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

Combined Transport is the low hanging fruit
4 years of the CT4EU campaign: 2021-2024

2021-22: studies, design, website, social media presence, organization – [www.ct4eu.eu](http://www.ct4eu.eu) - [https://www.linkedin.com/showcase/ct4eu/](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

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**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

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Bettembourg - 12.10.2023
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@uiirr.com
Stay in touch with UIC!

www.uic.org

#UICrail

Thank you for your kind attention.