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The UIC and its Combined Transport Group present *"2012 Report on Combined Transport in Europe"*.

(14 January 2013, Paris) The ***"2012 Report on Combined Transport in Europe"*** is the fourth in this series. Previous editions published in 2006, 2008 and 2010 concerned the years 2005, 2007 and 2009 respectively.

The 2012 Report was researched and prepared on behalf of the International Union of Railways (UIC) by KombiConsult and provides a snapshot of the combined transport industry in 2011.

This periodic publication stems directly from the UIC DIOMIS (www.uic.org/diomis) project (Developing Infrastructure use and Operating Models for Intermodal Shift), which analysed the prospects, constraints and development conditions of Combined Transport in Europe by 2015-2020.

The final report of DIOMIS, called "*Agenda 2015 for Combined Transport in Europe*" (see www.uic.org/diomis), proposed a toolbox of measures and best practices in the different fields of Combined Transport, with a view to cope operationally with a strong growth of CT in anticipation of expected infrastructure capacity constraints.

It was decided, in the aftermath of the interest raised by the findings and prospects of DIOMIS and the success of the first situation report, published in 2006, to deliver an update report every two years.

With this series of Reports, the UIC wants to:

- deliver evidence of the importance of the intermodal industry in Europe to stakeholders
- provide market data for the intermodal industry
- establish a time series on the evolution of the intermodal industry
- put intermodal / combined transport at the heart of the discussion on modal shift
- underline the importance of close cooperation between stakeholders of the combined transport chain
- encourage modal shift towards rail and show the pertinence of the various combined transport techniques in achieving this.

The present report is based on extensive surveys of intermodal service providers (Railway Undertakings, Combined Transport Operators,…).

As in previous editions, the Report focuses on:

- domestic and international intermodal transport data for 30 European countries
- growth forecasts for domestic and international combined transport
- market structures
- business models
- market shares per traffic segment
- combined transport's contribution to the overall economy.

In addition, the 2012 version of the Report features:

- an Origin-Destination matrix for the main routes served in accompanied and unaccompanied transport
- traffic data for the main European ports
- an analysis of the carbon footprint of the industry
- an analysis of the most striking developments in the combined transport industry for the period under review.

Unaccompanied Combined Transport volumes exceed pre-crisis levels.

In the year 2011, the stakeholders **of European unaccompanied Combined Transport** achieved a new all-time high in terms of volumes transported. Altogether they carried a **total of 18,116,920 TEU** on domestic and international CT services. This is an increase of over16% compared to the year 2009 when volumes dropped to 15,575,150 TEU. It shows that CT in Europe has not only recovered from the decline of demand, impacted by the global economic and financial crisis, but even exceeded the previous record, achieved in 2007.

Unaccompanied CT: TEU carried 2005-2011

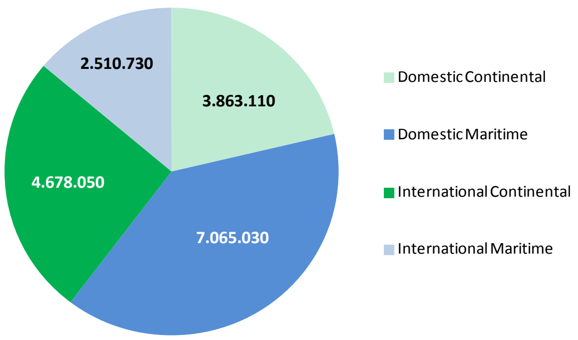
CT market segment	TEU				% change 2011/2005
	2005	2007	2009	2011	
Domestic CT	8.708.170	10.367.810	9.451.870	10.928.140	25,5%
International CT	5.378.880	7.007.250	6.123.280	7.188.780	33,6%
Total CT	**14.087.050**	**17.375.060**	**15.575.150**	**18.116.920**	**28,6%**

Source: UIC 2012 Report on Combined Transport

Domestic Combined Transport accounted for 10,928,140 TEU in 2011 corresponding to a market share of 60.4% of the total CT volume. Maritime transport continues to clearly dominate domestic CT accounting for 64.6% of this sector, leaving 35.4% for continental services.

The ratio between these two market segments is almost reversed in **international CT**: Continental shipments have a share of 65.1%, the maritime CT 34.9%.

Unaccompanied CT by market segment: TEU carried 2011



Source: UIC 2012 Report on Combined Transport

CT service providers in Europe shipped 9,575,760 TEU in **maritime CT** in the reporting period. This market segment continues to keep its leading position with a share of 53.9% but lost three percentage-points compared to 2009. This also reflects the less than average growth rate of this sector.

In contrast to that, **continental CT** services soared and reached a growth rate of 27.1% between 2009 and 2011.

The 2012 survey on European CT has identified the following six companies supplying **accompanied CT services** in Europe in 2011: Adria Kombi, Alpe Adria, Hungarokombi, Ökombi, RAlpin, VIIA Autoroute Ferroviaire Alpine.

The six providers of accompanied CT services conveyed 433,550 road vehicles in the year 2011 or, after conversion, volumes equivalent to 1,010,180 TEU.

Compared to the 2009 volume of 1,021,930 TEU this means a minor decrease of just over1%.

Whilst the total of international accompanied CT services performed extremely well and raised the number of trucks carried by about 13%, the domestic market segment lost 20% compared to 2009. As a result, its share of the total accompanied CT volume dropped from 42.6% (2009) to 34.4% (2011).

Accompanied CT by market segment: TEU carried and goods moved 2009/2011

CT market segment	TEU		% change 2011/2009	Gross tonnes		% change 2011/2009
	2009	2011		2009	2011	
Domestic CT	435.020	347.530	-20,1%	6.766.140	5.421.430	-19,9%
International CT	586.910	662.650	12,9%	8.350.760	9.448.570	13,1%
Total CT	**1.021.930**	**1.010.180**	**-1,1%**	**15.116.900**	**14.870.000**	**-1,6%**

Source: UIC 2012 Report on Combined Transport

<u>Overall, Combined Transport witnesses 15% volume growth compared to 2009</u>

In 2011**, total combined transport volumes** tipped the 19 million TEU mark, thus setting a new record figure and demonstrating a 15% growth compared to the previous period reviewed (2009) and 29% growth compared to 2005.

Total CT by mode of CT and market segment: TEU carried 2005-2011

CT market segment	TEU (millions)				Percentage change	
	2005	2007	2009	2011	2011/2009	2011/2005
Domestic UCT	8,7	10,4	9,5	10,9	15,7%	25,5%
International UCT	5,4	7,0	6,1	7,2	17,5%	33,6%
Domestic ACT	0,1	0,3	0,4	0,4	-20,5%	250,0%
International ACT	0,7	0,7	0,6	0,7	11,9%	1,5%
Total CT	**14,8**	**18,3**	**16,6**	**19,1**	**15,2%**	**28,9%**

Source: UIC, 2012 Report on Combined Transport

<u>UIC Combined Transport Group opens up to stakeholders</u>

The results presented herewith are a clear indication of how buoyant the combined transport industry is.

The steady growth demonstrated year after year shows how important it is for the combined transport stakeholders to have adequate conditions to ensure modal shift towards rail is further realised.

This is further illustrated by the concrete implementation of EU Regulation 913/2010 on rail freight corridors, a debate in which the interests of the combined transport industry need to be voiced.

In order to support this, the UIC Combined Transport Group chaired by Eric Lambert, CFL MM, feels it important for the key stakeholders to join forces and therefore invites terminal operators, logistics platforms and combined transport operators to join its working structures under the UIC roof.

Note: The "2012 Report on Combined Transport in Europe" is available at:
http://uic.org/spip.php?rubrique1723

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