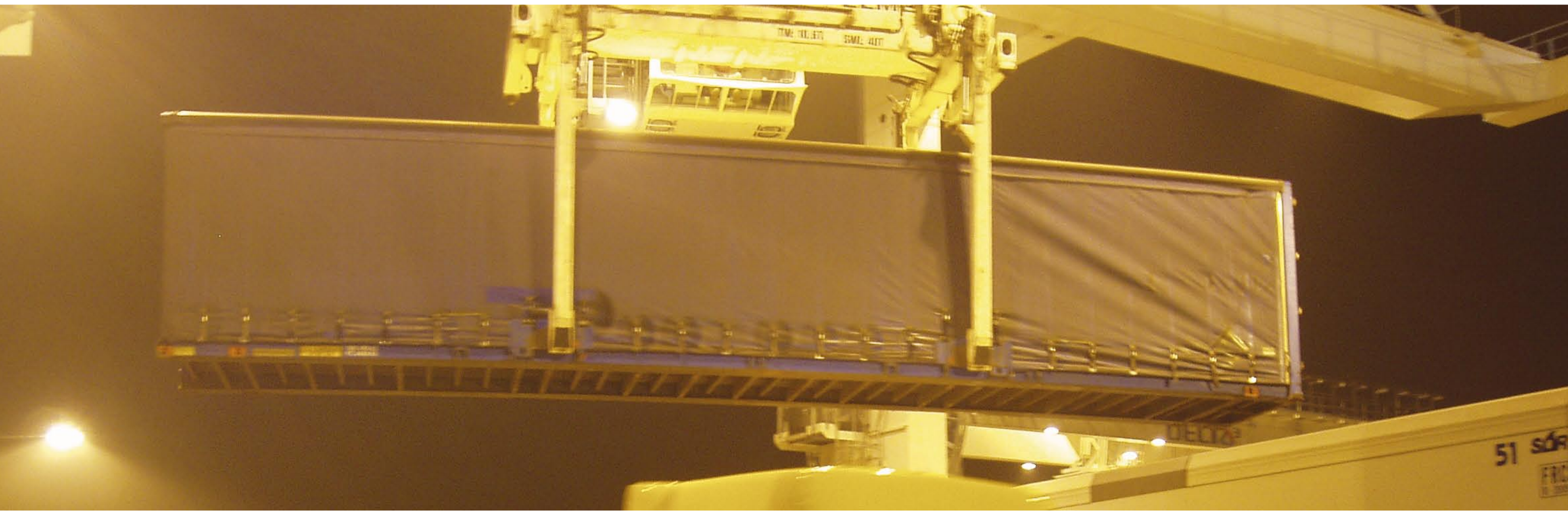
Report 2004 EN

International Union of combined Road-Rail transport companies



IMPRESSUM

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FOREWORD

Eugenio Muzio

Chairman of the Board

The year 2004 was undeniably marked by developments that were at one and the same time positive and negative.

Among the positive elements, the admission of ten new countries to the European Union on May 1st has significantly increased its economic potential in an ever more dynamic and world-global context.

This widening of the Community's internal market made its effects on the movement of people and goods making use of the major European axes felt quite rapidly in the "old" Member States.

Among the negative aspects we observe that, contrary to the United States and the Far East, economic recovery has been slow to appear here.

Such a situation obviously delays any rationalisation processes and especially the one that would allow a more consistent modal split. The Combined Transport sector (CT) was also affected by this economic situation, in particular during the second half year:

- the impact on unaccompanied CT was not too pronounced considering that, despite some difficulties, this technique recorded a global traffic increase of 4% (new members not considered);
- in accompanied CT however, several routes suffered a significant decrease in the number of consignments following the discontinuance on January 1st of the eco-points system that applied to traffic transiting through Austria, and on May 1st of the quotas for the commercial exchanges between old and new Member States.

Various political developments also took place at the European level.

The newly appointed Commission has included various initiatives in its work programme, designed to increase the efficiency of rail freight and hence increase the market shares of the railways for which CT represents the best possible asset.

I would in this respect like to express my thankfulness to Transport Commissioner Mr. Barrot for having, right from the beginning of his mandate, demonstrated a clear interest in CT as a key tool to modal shift. This allows us to hope that under his impulse all relevant Community bodies will implement a policy of support to CT, amongst other things by means of specific aid plans, so as to give the goal of road to rail transfer of goods stated in the 2001 White Paper the better chances to be reached.

The creation of the European Railway Agency (ERA) constitutes another essential instrument to ensure that the interoperability associated with targeted organisational choices and infrastructure projects will over time allow for the harmonious development of cross-border exchanges.

Furthermore, the rail liberalisation – in which the members of our international Union strongly believe – is beginning to take concrete shape. So one of them came through a call for tenders to entrust several railway undertakings (RUs) with the traction of its trains on condition that on each of the axes concerned one single such undertaking would be responsible for the entire route regardless of the countries crossed and RUs involved in the provision of the service.

In this encouraging context and in accordance with its custom, the UIRR presents itself to the Commission and European Parliament as an interlocutor able to provide the best 'field' experience so as to ensure that their options are made up of the most efficient solutions and so as to make sure that this transport technique deserves to be considered as the best answer for a sustainable development of European freight. The admission of new important members/operators within the UIRR as well as the newly adopted dual management of its Brussels Bureau will undoubtedly help it to carry out its mission.

Eugenio Muzio

GENERAL PROMOTION OF CT

Rudy Colle
Director General

This UIRR Annual Report has selected the promotion of Combined Rail-Road Transport as its main theme.

This specific technique for the forwarding of goods has well-established – ecological and other – advantages but for the market to have recourse to it, the product must be competitive by its reliability and its prices and benefit also to that end from fair conditions of access to the business.

This requires unremitting vigilance as the transport sector is in constant evolution and is subject to lobbies driven by political, industrial and commercial interests which are often different from ours.

UIRR promotes CT at two closely interactive levels.
The Brussels Office sees to support the activity of its member companies by putting forward, by all useful means, the needs relating to the political and regulatory provisions suited to a more sustained development of CT; it also coordinates the various projects awarded to the UIRR in the context of the R&D framework programmes of the EU and Marco Polo. For their part, our members primarily seek to promote CT by means of their product, that is to say, by elaborating the services and systems most likely to meet their clients' requirements. Their targeted participation in EU projects is in line with this objective.

At the political level, we have been led to take position concerning several important issues amongst which:

- the liberalisation of rail transport which is – slowly – taking actual shape as regards freight transport, with initial convincing results. Very many services of this kind will, in any event, continue to be provided on the same infrastructure and with the same production means by railway undertakings further entrusted with the provision of passenger train services for which the opening to competition will only take place, at the earliest, in five years' time. We shall need to pay attention to this cohabitation, bearing the additional danger that only passenger trains might benefit from a legal non-quality compensation regime;

- the promotion, by means of a draft Directive of the Commission on "European" intermodal loading units, of which the objective of dimensional compatibility with a maximum number of transport modes is praiseworthy, and supported by the UIRR to the extent, however, that the Community text would not involve a de facto or legal obstacle to continuing to produce and operate non-stackable swap bodies; the economic, operational and commercial success of the latter units is indeed not accidental;

- safety in intermodal transport, an essential area in which it will be necessary to ensure that the specific characteristics of CT, a mode already accompanied by various protection measures, are taken into account, in order to avoid a commitment to excessive expenditure as compared with actual risks;

- finally and above all, the quality of rail freight services. The statistics published further in this report show an improvement in average punctuality in 2004 as compared with the deplorable results of the previous four years, although progress must and can still be made in CT, especially as these data relate to full train services with constant annual programme planning.

A framework text which would offer minimum quality guarantees to clients and would be drawn up, if possible, by the various groups of actors concerned, would constitute for each of them an incentive to provide services in accordance with the contractually agreed standards and, in this way, to meet the requirements of the market and the interests of all.

PROMOTION THROUGH PROJECTS

Martin Burkhardt
Director General

The EU Commission is eager to shift a major part of the projected transport increase to rail. In the chapter entitled "Sustainable surface transport" of the 6th research framework programme it promotes implementation of the change in the European railway system.

The UIRR office in Brussels and its member companies are committed to participating actively in projects for the development of a uniform European rail freight transport market.

Practically all Combined Transport actors on the Brenner transit corridor through the Alps are participating in the BRAVO project: both traditional and new private railway undertakings, the CT operators Cemat, Kombiverkehr and Ökombi, as well as a wagon manufacturer and several consultants, under the project coordination of KombiConsult. The goal is to develop a set of measures in order to increase Combined Transports in the long term on the Brenner axis:

- coherent corridor management system
- interoperability and use of multi-current locomotives
- customer information and quality management system
- innovative technologies and services.

The project participants are already demonstrating direct implementation of these measures in practice. Through documentation and dissemination of the experience gained, it will benefit the entire European rail freight transport sector.

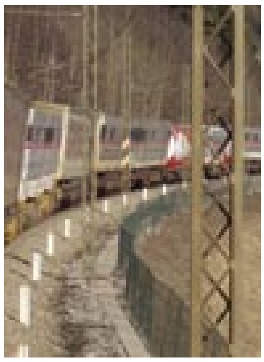
The TREND project supports the incipient change in the rail freight transport market. A consortium consisting of the railway organisations UIC and CER, the UIRR as representative of major customers and a number of consultants under the guidance of HaCon is cooperating in this regard with a network of experts from both traditional and new railway undertakings, from the shippers, from ports as well as from terminal and CT operators. The aim of this "coordination action" is to enlist the participation of as many important groups of actors as possible in the development of strategies for the railway market of the future.

During the analysis stage, a knowledge database is being compiled which will document the structural changes and their deficiencies in the railway market of 14 European countries (additional countries are being covered by a parallel "Reorient" project). This work is serving as an input for the European Railway Agency which is in its setting up phase; this Agency will continue market surveillance and is receiving considerable powers to push European harmonisation forward. The collected data will be made available to the public in a geo-information system on the project web site. This work will be deepened by a number of studies on main freight corridors in order to identify problems and elaborate "best practices", i.e. key factors for successful products and strategies. In the end, corridors and operational models will be submitted to the EU Commission for subsequent project allocations.

As leader of the "Freight Transport" user group, the UIRR is also participating in the COUNTERACT coordination project, in which recommendations are worked out for increasing security especially in relation to terrorist threats towards the energy and transport sectors.

The project work is promoting concrete innovation and is contributing to exchanges of experience not only among the partners but also in relation to the EU Commission, Parliament and Council of Ministers which determine the future framework conditions for the transport sector.

www.bravo-project.com
www.trend-project.com



PROMOTION THROUGH CONTINUOUS TRACTION

Bernhard Kunz

Director General of Hupac SA

Hupac is the first operator in Europe to fully use the opportunities of the railway reform for the entire range of its services. At the beginning of 2004, traction of its trains was put out to international tender. Thanks to this call for tenders, five railway undertakings are operating today in transit through Switzerland: SSB Cargo, Stinnes, Trenitalia Cargo, Rail4Chem and FNM.

The production system which was newly introduced in December 2004 is based on the principle of continuous traction and sets the stage for an efficiency increase in the rail system. Multi-system locomotives are being used which can operate in two or three countries. Crew is changed at the borders, while Swiss locomotive drivers are already on duty in this capacity also in Italy. In addition, for each international journey only one railway undertaking is responsible as the main carrier from origin to destination. The new competitive situation in Alpine transit has a positive effect on railway costs and helps compensate the reduction of the Swiss federal government's operating aid.

According to a Prognos study, Combined Transport will expand considerably during the next few years. In Switzerland, we assume a doubling of the current CT volumes over the next ten years. How is the shift of traffic from road to rail to be carried out? The new situation is bringing the long-awaited turning point towards better traction quality. At the beginning of 2004, we invited various European railway undertakings to submit their bids for the traction of our trains during the years 2005/2006. The Hupac tender for the entire train package was, in terms of turnover, the largest of its kind in European Combined Transport. The award criteria were clear: in addition to the cost-performance ratio, the continuous traction.

What are the advantages for the railway undertakings and their customers?

- Traction productivity can be improved on a long-term basis. The present changes of locomotives at the border will no longer be necessary. These interfaces frequently give rise to problems as the necessary resources are lacking, e.g. on the further segments of the journey.

- Responsibility for traction lies with only one railway undertaking, the only contact for the service in question. A train used on a 1,000-km-long route can be coordinated and monitored through a single interface.

- Quality agreements in cooperation with customers are made possible.

- Administrative burden is reduced. The data relating to the train, consignment note and customs, which today have to be reported to up to five different railway undertakings and customs offices, can in future be coordinated through one interface.

We were pleasantly surprised by the quality of the bids we received and above all by the innovative approach. This shows how openly the railway people see this opportunity. The new concept was implemented in December 2004. We are sure that, together with our partners, we can make a major contribution to shifting traffic to rail.

PROMOTION THROUGH THE PRODUCT

Denis Petitmengin

Deputy Director General of Novatrans SA

Combined Transport has become an unavoidable technique when it comes to materialising transfer of goods from road to rail and should thus be at the middle-point of political and operational promotion campaigns.

Sustained contacts with European and national policy-making bodies and with other professional organisations, active participation in trade fairs and in seminars devoted to transport and logistics, as well as publication of reports in the major media, are our traditional tools for promoting CT. On a day-to-day basis, the product which we are capable to offer to the market, meeting service quality criteria but also in economic terms the prices applied are also evident means of support.

Regarding pricing seen in the light of the full-road haulage market, two considerations deserve our attention.

The first concerns the enlargement of the European Union to 25 Member States and the fact that the new entrants benefit from much lower production costs than those that apply in France, with a downward pressure on the prices of road transportation as a consequence.

The second observation relates to the policy followed by certain railway undertakings (RUs) by which their – legitimate – attempt to reach balanced accounts is pursued more through price increases than through a reduction of their production costs. Very obviously the opposite strategy would prove beneficial, in first instance to the customer, but also to the whole rail freight sector considering the fact that its market shares would increase by reason of demand elasticity in a situation of decreasing prices.

In the absence of such a change, the only way to limit the effects of this pricing policy on our customers is further bulking traffic flows, sometimes at the risk of a drastic reconfiguration of the transport schemes which may also lead to a reduction of the capacities supplied.

Such a reconfiguration produces clear positive results since it increases the load factor of the trains and hence the overall efficiency of actual CT consignments.

Further developments should also be pursued or taken into consideration, such as the option of carrying out ourselves the shunting and other operations in the transshipment yards, the RUs only providing traction between the formation sidings.

Competition afforded by the development of new RUs should equally enable us to keep our capacity purchase costs down and consequently enable us to improve our selling prices as well as the attractiveness of this specific transport technique.

This scissors' effect combining reduction in road market prices with an upwards revaluing by the railway undertakings of their prices must necessarily be controlled by means of an action plan targeting each constituent of the production costs. Failing to do this, there is a major risk of missing the development of CT, which represents one of the explicit priority objectives of national and European policies, but also of missing the opportunity to reinforce our role and our contribution to a sustainable freight transport system.

PROMOTION THROUGH ACCOMPANIED TRANSPORT

René Dancet
Director General of RAlpin AG

"The Rolling Motorway of RAlpin AG is generating a very visible transfer of traffic": this is the cheerful conclusion that our company, operating this type of service on the Lötschberg-Simplon axis, can draw on the occasion of its fourth anniversary.

The RAlpin AG was founded in April 2001 by three companies, BLS Lötschbergbahn AG, Hupac SA and SBB Cargo AG. The supply of services connecting the two terminals of Friburg-in-Brisgau and Novara now makes it possible to forward trucks with a corner height of 4 m, a width of 2.50 m and a total weight of 44 t by rail across Switzerland.

During 2004, 64,717 drivers of heavy goods vehicles crossed, so to speak, the Alps while sleeping, which corresponds to a 15% increase over the preceding year. The 5,333 trains had an average load factor of 80%.

Taking advantage of the opportunities offered by rail liberalisation, the traction of an additional pair of trains was put out to international tender during the autumn of 2004. In addition to the current railway undertakings – BLS Cargo, Trenitalia and Railion – services were awarded for the first time to FN Cargo established in Milan. This trend will also continue in 2005: on the occasion of the change of schedule on 12th December 2004, the management of the trains between Friburg-in-Brisgau and Basel was transferred to SBB Cargo Deutschland. Competition on rail enables us to hope for a reduction in the important delays in rail transport. From this point of view, a corresponding quality agreement will be concluded in 2005 with the railway undertakings concerned.

RAlpin is looking forward to consolidating its position in Alpine transit traffic. The introduction of a tenth pair of trains in the autumn of 2004 laid the foundations for achieving, in the long term, a supply of 105,000 booking capacities, corresponding to the objective of the Swiss transport policy. The planning of a new and gradual expansion of our supply in connection with the opening of the basic Lötschberg tunnel in 2007 is already under study.

By transport prices which are unchanged since 2001, the Rolling Motorway is a highly interesting solution as compared with the cost of road transport. In 2005, this attractiveness will be further enhanced in Switzerland as a result, on the one hand, of the increase in the heavy vehicles fee, depending on the kilometres driven, weight and emissions (LSVA) and, on the other hand, of the introduction of the distance-based toll (Maut) on the same vehicles in Germany.

With operating accompanied CT on the Lötschberg-Simplon route, RAlpin AG is contributing to a decrease of heavy traffic in the Alps and to a reduction in environmental damage in this region. In first instance this involves primarily a commercial quality service for the shipper and, in particular, for trucks and their drivers.

The Rolling Motorway is actively transferring transalpine road traffic to rail and has established itself in the market. Thanks to an attractive offer, it will constantly consolidate its market shares in the years to come.

With its current results, RAlpin AG accounts for a substantial part of accompanied UIRR consignments. Since RAlpin joined the UIRR in 2003, we have together contributed to strengthening the role of Combined Transport.

THE YEAR 2004 IN BRIEF

THE UIRR

The Association
UIRR's Autumn Assembly was held on September 23rd-24th 2004 in Bruges and its Belgian member company **TRW** seized this opportunity to celebrate at the same time its fortieth anniversary. Among the subjects addressed were service quality, future infrastructure capacity needs, the proposal for a Directive on loading units as well as safety. During the closing Congress, representatives of the various sectors concerned presented their respective point of view on "CT – a strategic element in rail freight".

On the occasion of its December meeting in Brussels, the Board of Directors unanimously approved the joining of **Intercontainer Austria** as a new full member of the UIRR with effect on January 1st 2005. **ICA** provides, primarily, various services for the carriage of containers in maritime (70% of consignments) and continental (20%) traffic but also rolling road services (10%). Its shareholders are the companies Speditions Holding AG (ÖBB), ICF as well as the railway undertakings MAV and Raab-Ödenburg-Ebenfurter Eisenbahn AG. **ICA** commercialises 100 full trains weekly which in 2004 accounted for a total traffic of 330,000 TEUs.

Following the termination of the CESAR project, the Cesar Information Services company was formed to operate commercially this harmonised European information interface for CT consignments. The year 2004 also saw the launch of the BRAVO project in which various UIRR companies are participating and which aims at developing traffic on the Brenner route.

The member companies
The change in the structure of the **Ökombi** company, which had been planned for a while, has taken shape. The takeover of the activities of **Ökombi KG** by **Ökombi GmbH** took place at the beginning of 2005, with the subsidiary of ÖBB Rail Cargo Austria (RCA) as shareholder. Thanks to this strategic partnership, the company armed itself to continue playing a major role in the European CT market.

Considering its figures for 2003, its commercial projections and the expected increase in production costs, **CNC** has taken measures aimed at improving the relation between transport flows and transport plan and at adapting its means accordingly. The 2004 financial year was nevertheless marked by a negative result both for external reasons (an increase in the cost of traction, reduction of State aid to CT) and for specific internal grounds (economic inadequacy of the plan built around a nodal point in its present form). The company has therefore drawn up additional measures and is considering various scenarios relating to a new operating model.

The UIRR companies have been further actively promoting CT in general and specifically promoting their products on the occasion of various exhibitions such as the SITL in Paris (**Novatrans**, **TRW**, **Cemat** and **Hupac**), Transpotec in Verona (**Cemat**, **Hupac** and **Ökombi**) and ITL in Copenhagen (**Kombi Dan**, **Hupac** and **Kombiverkehr**).

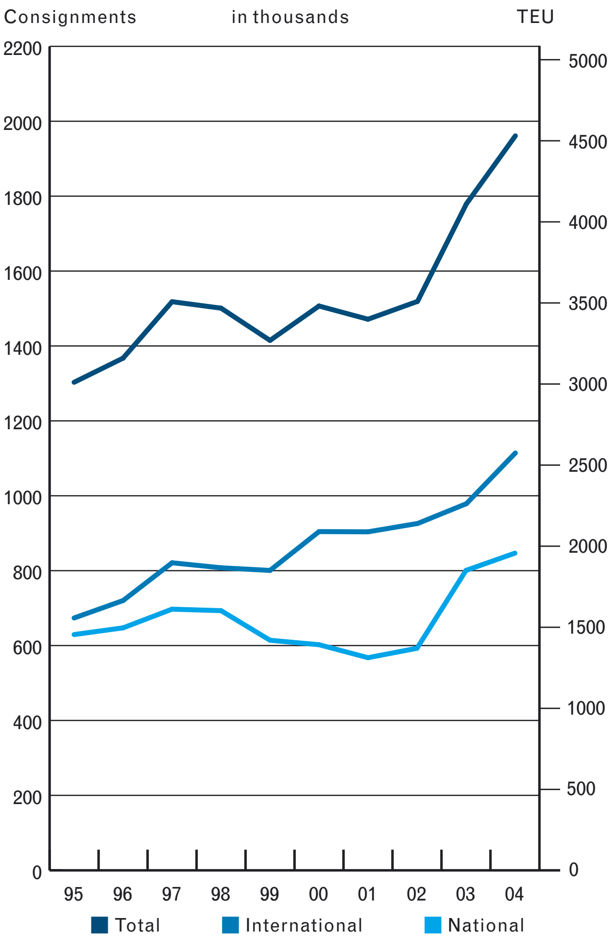
Community policy

Third railway package
In March 2004, the European Commission adopted a third railway package designed to increase the share of rail in the modal split of freight in Europe. This package comprises four legislative proposals concerning respectively liberalisation of passenger transport, certification of train drivers, the rights and obligations of passengers and also, as most important issue for the UIRR, compensation in case of non-compliance with the contractual quality requirements for rail freight services. This third package has been transmitted to the Council and the European Parliament, called to assess the Commission's proposals and to define their position by means of the co-decision procedure regarding the four issues.

see p. 12

THE YEAR 2004 IN BRIEF - TRENDS

Unaccompanied Transport 1995-2004
(Swap bodies, Containers, Semi-trailers)



Unaccompanied Transport (Consignments)

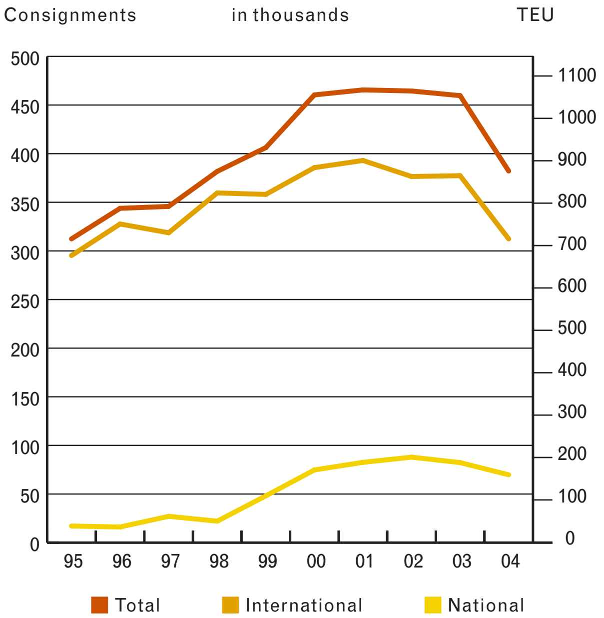
Year	International	National	Total
1995	673.649	629.359	1.303.008
1996	720.190	647.287	1.367.477
1997	821.009	697.191	1.518.200
1998	807.739	693.233	1.500.972
1999	800.624	614.183	1.414.807
2000	904.339	602.314	1.506.653
2001	903.708	567.642	1.471.350
2002	925.742	592.731	1.518.473
2003	978.915	800.612	1.779.527
2004	1.114.364	846.775	1.961.139

International unaccompanied transport handled by UIRR companies has increased by 143,000 consignments or 14% compared to 2003. Transalpine traffic has again recorded considerable progress, particularly to/from Germany via Gothard and Brenner (growth rate of 11%). Liberalisation is starting to bear fruit on these two main corridors, with increased capacities available in competition, but also with an overall improvement in the quality of service. Traffic to/from France is up by 18%, and the trend is even more marked during the first quarter of 2004, thanks to an increase in the amount of rice traffic from the Ile de France region to Northern Italy. Traffic to/from the Netherlands rose by 22%. The product strategies implemented by some UIRR companies aimed at extending traffic with the Benelux countries, especially between Belgium/Netherlands and Germany, as well as at increasing services for Scandinavia. Certain traffic flows from ports in Northern Germany have had to cope with tough competition, especially on the Germany/Austria (-38%) and Germany/Hungary (-8%) routes.

National unaccompanied transport is up by 46,000 units or 6% compared to 2003. Germany, France and Italy share 85% of these consignments. The high level of punctuality in Germany (90% on average) has led to a net increase in consignments (+20%). In Italy, traffic is up by 3% thanks to new direct trains to Sicily, thus avoiding the hub of Marcianise, near Naples. In France, the rise in prices has caused considerable disruption to CT operations (-6%).

In total, unaccompanied transport shows a 10% growth. The fact that Alpe Adria and Conliner joined the UIRR in 2004 has accentuated the rate shown in these statistics.

Accompanied Transport 1995-2004
(Rolling Road)



Accompanied Transport (Consignments)

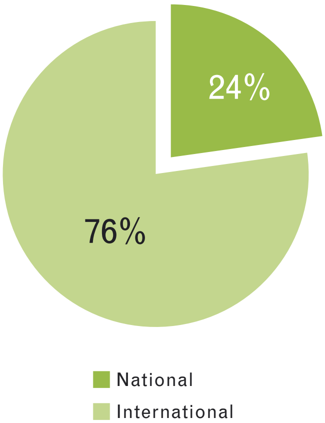
Year	International	National	Total
1995	295.261	17.095	312.356
1996	327.676	16.103	343.779
1997	318.657	27.087	345.744
1998	359.606	22.122	381.728
1999	358.111	48.099	406.210
2000	385.643	74.777	460.420
2001	382.964	82.589	465.553
2002	376.512	87.922	464.434
2003	377.348	82.308	459.656
2004	312.329	69.786	382.115

International accompanied transport had a very difficult year, with a 17% decline in consignments. Following the EU enlargement, the considerable shrinking of demand on the Dresden-Lovosice link led to its cessation in June 2004. Following the suppression of the Austrian ecopoints system on 1.1.2004, traffic on numerous Rolling Road links to/from Austria have significantly dropped, especially the one between Manching and Brennersee (-41%), closed down in December 2004. Thanks to the Swiss framework conditions which are more favourable to CT, the situation is quite different on the Gothard line, especially on the links between Singen-Milan (+56%) and Friburg-Novare (+15%). The same observation can be made for national accompanied transport, where international road consignments in transit are also routed by rail: in Austria, it has fallen by 20% whereas in Switzerland, it is up by 27% thanks to a doubling of services available between Basel/Aarau and the Tessin region.

THE YEAR 2004 IN BRIEF - TRENDS

Total Traffic

(Accompanied and Unaccompanied)

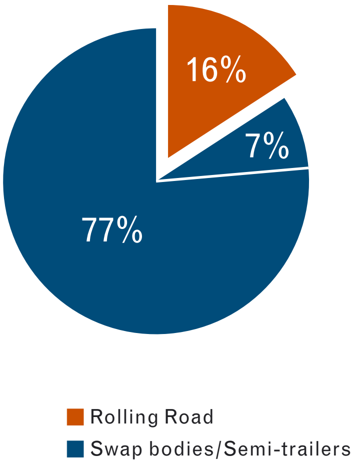


International and National traffic in Mio TKM

Year	International	National	Total
1995	17.720	7.250	24.970
1996	19.584	7.583	27.167
1997	21.527	8.334	29.862
1998	21.926	8.308	30.234
1999	20.742	7.846	28.588
2000	24.330	8.156	32.486
2001	24.663	7.217	31.880
2002	25.027	8.047	33.074
2003	25.248	7.671	32.919
2004	26.173	8.338	34.511

The traffic performances, expressed in tonne-kilometers (tkm), were positive. Internationally, they rose by 4%. A few links have made particularly important contributions to this result: Germany-Belgium, Germany-Switzerland, Germany-Spain, Germany-Italy, Germany-Netherlands, Belgium-Italy and France-Italy. National traffic for its part has recorded an overall increase of 8% in tkms. The main reasons for these changes are on the one hand the increase in the average distance covered in France, Italy, Romania, and on the other hand the traffic growth in Germany, Italy and Switzerland. The average distances are around 760 km for international journeys and 560 km for national ones. The gross average tonnage for a loading unit is 24 tonnes internationally and 21 tonnes nationally.

Techniques



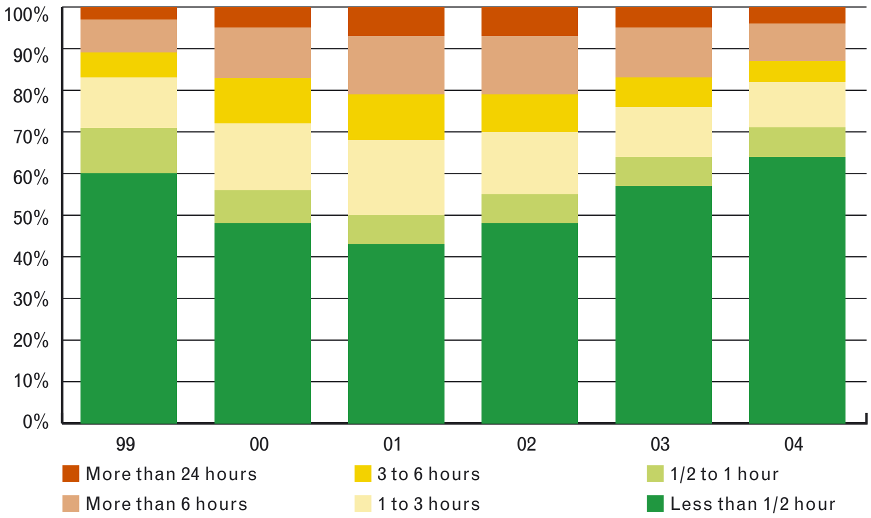
Proportion of CT techniques in total traffic in thousand consignments

Year	Swap bodies	Semi-trailers	Rolling Road	Total
1995	1.079	224	312	1.615
1996	1.161	207	344	1.711
1997	1.333	185	346	1.864
1998	1.335	166	382	1.883
1999	1.260	154	406	1.821
2000	1.333	172	460	1.964
2001	1.300	171	466	1.937
2002	1.367	152	464	1.983
2003	1.405	145	460	2.010
2004	1.806	155	382	2.343

In 2004, unaccompanied CT represented 84% of the consignments, 77% using swap bodies (used both for pure road transport and for Road-Rail CT) and containers, and 7% using semi-trailers. The proportion of loading units other than semi-trailers increased mainly due to the container traffic of two new UIRR members. 56% of the swap bodies and containers are routed internationally, the remainder nationally. In unaccompanied international CT, customers have mainly chosen small units (consignments of two 7m-8m units) which account for 37% of the consignments. The market is changing perceptibly: the proportion of large units (over 8.30m) has moved from 29% (2003) to 33% (2004). The total number of semi-trailers transported increased on the Germany-Italy (+14%) and Germany-Switzerland (+10%) links, but they could not maintain their share in CT because the use of swap bodies and containers grew more significantly. Accompanied CT has sharply decreased (-17%): an important fall nationally (-15%) and an even sharper drop internationally (-17%) in spite of RAlpin's contribution of over 60,000 consignments.

Punctuality

(Delays)



On 28,230 trains monitored in 2004, 64% were on time (tolerance of a 30-minute delay). Compared to 2003, this is a positive evolution, but even so we cannot consider the average rate achieved to be satisfactory yet. 81% of the delays can be attributed directly to the RUs, the lack of traction or locomotive drivers remaining one of the major causes. The Brenner, Gothard and Modane axes account for just over 50% of all of the trains monitored. The Brenner line has seen its punctuality improving considerably thanks in particular to the arrival on the market of new competing RUs. Through the 'Brenner Action Plan 2005', various measures have been taken and clear responsibilities assigned to each partner. This kind of programme should be applied to other lines which are unable to announce results as positive as those achieved on the Brenner. Increasing the punctuality would allow to enter market segments which are inaccessible for the moment, such as consolidation goods, food products or express parcels.

The Committee of the Regions had given a generally favourable opinion, while the Economic and Social Committee declared to be in favour of positive incentives rather than of compensations for improving freight quality. The UIRR and the railway undertakings (RUs) have also studied this essential subject and have sought to jointly draft a framework agreement which would constitute a voluntary commitment. Nevertheless, various draft agreements – including the one which was presented at the UIRR and UIC/GTC Autumn Assemblies in September 2004 and was approved by the CT operators – have not been accepted by the railway undertakings. At the time of going to press, it has not been possible to conclude any agreement with concrete substance yet.

Railway harmonisation

The European Railway Agency (ERA), which has its offices in Lille/Valenciennes (F), held the first meeting of its Administrative Board on 15th July 2004. The European Commission appointed Dr. János Berényi, Vice-Chairman of the UIRR, to represent the freight customers in the Administrative Board of the ERA. The main tasks of the Agency are to improve interoperability and strengthen

safety of rail transport in Europe. At a more operational level of CT, the Commission has amended its draft Directive on intermodal loading units (ILU) and the standardisation of a European intermodal loading unit (EILU) which it had initially adopted in April 2003. In accordance with the opinion of the European Parliament in its first reading, the new text certainly brings the control requirements into alignment with those of the Container Safety Convention (CSC), which is in force throughout the world, but the Commission has not adopted an amendment guaranteeing that all swap bodies without exception can continue to be used. The UIRR is consequently devoting efforts to ensure that the Council and Parliament support taking this amendment into consideration during their examination of the new proposal.

Development of CT services

Accompanied CT (RoLa)

The suppression of the ecopoints system for the transit through Austria by heavy goods vehicles on January 1st 2004 has considerably affected recourse to the rolling road (RoLa) services supplied by the UIRR companies. On the other hand, the accompanied services provided by **Hungarokombi** on the EU territory benefit further from VAT exemption. The enlargement of the EU by ten new countries on May 1st has also involved the shifting of the external borders and the inherent abolition of authorisations for the transport of goods by truck between the "old" and the "new" Member States. On several routes, this situation has severely disadvantaged accompanied CT which finds itself in direct competition with full road transport. Thus the **Ökombi** company registered a 22% drop in its accompanied traffic even if it showed a substantial 30% increase on the Brenner route; while **Crokombi** had to abandon opening a service it had planned between Zagreb (HR) and Wels (A), it will open, in cooperation with **Adria Kombi**, a new connection between Spačva (HR) and Ljubljana (SL), which is particularly attractive for South-East European (Romania, Bulgaria, Turkey etc.) hauliers providing transport to the Western parts of the continent. The accession of Slovenia to the EU has had immediate consequences for the accompanied traffic volumes of **Adria Kombi**: the major contraction in Slovenian demand entailing a 30% fall on the Ljubljana (SL)-Salzburg (A) and Maribor (SL)-Wels (A) lines has been partly compensated for by the demand from Turkish carriers. All of the accompanied services of **Hungarokombi** have also experienced a 23% fall in traffic and its client structure is now almost exclusively outside the EU. In addition, the Sopron (HU)-Wels (A) connection was, despite an adaptation of its frequency, halted in October, while **Kombiverkehr** and its partner **Bohemiakombi** have had to eliminate the Dresden (D)-Lovosice (CZ) RoLa service which had forwarded more than 93,000 consignments in 2003.

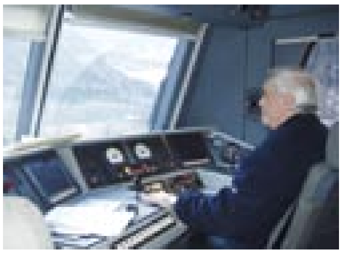
As far as the **Hupac** company is concerned, it registered a 20.4% increase in accompanied traffic transiting through Switzerland thanks to the absence of disruption in its activities and it was therefore able to recover the market shares which it had lost due to infrastructure problems in the Monte-Olimpino Tunnel.

Unaccompanied CT
The suspension, due to lack of profitability of the unaccompanied service provided by **Ökombi** to and

from German ports has led to a 33% fall in the total volume carried, but at the same time to productivity increase of the services provided. The number of the other consignments reached the level of 2003, with the Austrian company focusing its activity more on the supply of full trains and the development of their antenna links. As far as **Rocombi** is concerned, it achieved an 8% increase in its national traffic with focus on serving the hinterland of the port of Constanta (RO). The consignments forwarded by **Crokombi** to and from the port of Rijeka (HR) increased by 35% during 2004 because of its privileged geographical position and also of the interest shown by major shipowners. Despite the complexity of adaptation to Community requirements, **Hungarokombi** was able to register growth in the number of loading units from other EU States which were previously forwarded by road. The national consignments organised by **Kombiverkehr** experienced a 20% rise in 2004 thanks to consistent service quality which made it possible to integrate new relations in the Kombi-Netz 2000+ network. The global activity of **Novatrans**, for its part, experienced the effects of a reduction of State aid to CT. Despite the difficult economic situation, the postponement of State aid in Italy as well as of the kilometre tax (Maut) applied to heavy goods vehicles in Germany, all activities of **Cemat** showed an increase of 3% over the preceding financial year.

Innovations on the supply side

Operational developments
Since it has changed its schedules in December 2004, **RAlpin** has been using different railway undertakings: SSB Cargo Deutschland for the German section previously operated by DB, BLS in Switzerland, as well as Trentitalia (70%) and now Ferrovie Nord Cargo (30%) in Italy. Moreover, the volume of national activity of **Cemat** experienced an established growth in 2004, in particular thanks to the development of its "gateway" traffic (traffic which, having foreign countries as origin or destination, has transited through the national network). The **Conliner** company, which specialises in serving Western ports, has reorganised its production around a system of direct shuttles, thus developing, in cooperation with **Kombiverkehr**, the Duisburg terminal as a "gateway". **Novatrans** has refocused its activities on the main routes which, starting from Lille, serve Bayonne, Perpignan and Marseille; despite a 20% reduction in the transport plan, its national consignments were maintained at the level of the preceding year, while its international traffic is increasing. Using the opportunities created by the reform of the railways, **Hupac** launched in 2004 a call for tenders for the traction of its trains with, as the main criteria, the cost-performance ratio as well as continuous traction: from now on five railway undertakings are operating transit services through Switzerland. The shuttle traffic provided by **Eurotunnel** has remained stable for the year as a whole with a record – registered in June – of 6,390 trucks transported in 24 hours. As regards capacity control, **Kombiverkehr** is currently developing a railway capacity management system in association with Lufthansa Systems. Harmonisation of the loading structure and of wagon types will make it possible in the long term to optimise train composition, while the organisation of reservations from origin to destination on several sections will improve transport procedures.



Likewise, **Alpe Adria** has intensified its services to/from the port of Trieste and the region around, mainly through an increase in the frequency of its trains and also by improving their capacity. Due to an important rise in rail tariffs in France and also due to a lack of service quality, **TRW** has transferred all of its trains from/to Italy to the Athus-Basel axis, thereby increasing its total capacity by 15% while capacity from/to Spain, offered in partnership with **Combiberia**, has been increased by 10%. In Denmark a reduction by the railway undertakings of the number of trains available for the traffic of isolated wagons to Germany and Italy has led to a drop in the turnover of **Kombi Dan**; the national transport policy appears however to be moving towards more pronounced support for alternative modes of freight transport. In addition, the Danish company has finished putting in place the Goal system, which was developed by **Hupac** and **Cemat** for computer processing of its data, and is preparing for participation in the Cesar System.

New lines

The **Alpe Adria** company has put a new rolling road into service between Trieste (I) and Salzburg (A) for traffic from the Middle East and bound for EU countries. Since the schedule change in December, **Conliner** has been offering a daily direct train service between Rotterdam (NL) and the ports of Cologne and Düsseldorf (D). The **TRW** company, for its part, is offering new services linking Ronet and Liège (B) with Piacenza (I). In July 2004, **Hungarokombi** opened a new accompanied CT line between Budapest (HU) and Wels (A) for which, in response to demand, a second train was organised at the end of the year. The Swiss operator **Hupac** has continued to develop its products to the Benelux countries (serving of the ports of Zeebrugge and Rotterdam), Germany and Scandinavia and also its national traffic with a doubling of the capacities between Basel and Tessin. The Ljubljana-Munich connection, jointly established in June by **Adria Kombi** and **Kombiverkehr**, has since then registered a sharp increase thanks to its performance. Finally, Duisburg was confirmed in its interface position for the **Kombiverkehr** traffic to the destinations of Novare (with **Cemat** and **Hupac**), Lübeck, Wels and Lyon (in cooperation with Novatrans).

Terminals

Since the end of 2004, the transport operations carried out by **Rocombi** can transit through the new private terminal of Bucarest Berceni. The gradual putting into service of the new BILK terminal in Budapest has contributed to the development of the **Hungarokombi** services. Moreover, the end of the extension works at the Busto-Gallarate terminal in Northern Italy is planned for the second half of 2005 and this will make it possible to increase the volume carried by rail across the Alps. The year 2004 also saw the development by **Adria Kombi** of the "Gateway Slovenia" hub as well as the participation of **Kombiverkehr** in the management of the terminals of Ludwigshafen, Rostock Trimodal and Neuss Trimodal.

Rolling stock

During 2004, the activity of **Hungarokombi** was somewhat disrupted by infrastructure works as well as by insufficient capacity owing to a reduced number of wagons made available by the national railways. For their part, the **Cemat** and **Kombiverkehr** companies ordered wagons intended for the transport of wide-gauge loading units, while **Kombi Dan** replaced 25 4-axle wagons by 12 multipurpose 6-axle pocket wagons, following diversification of the loading units forwarded during the last few years.

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Statistics 2004

International Union of combined Road-Rail transport companies

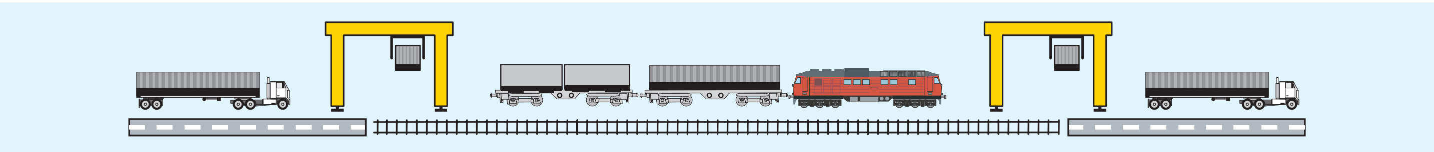
UIRR

GLOSSARY

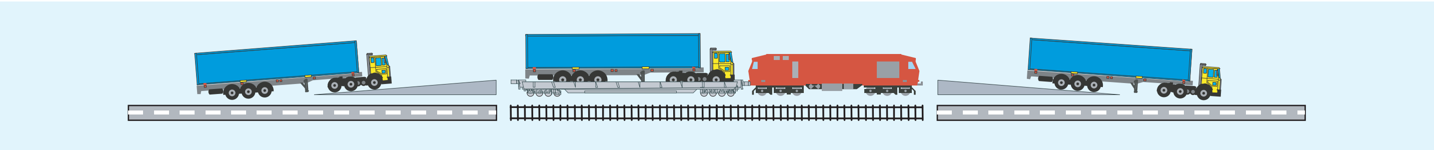
Intermodal Transport
The movement of goods in one and the same loading unit or road vehicle, which uses successively two or more modes of transport without handling of the goods themselves in changing modes.

Combined Transport road-rail
Intermodal transport where the major part of the journey is by rail and any initial and/or final legs carried out by road.

Unaccompanied CT
Transport of a road vehicle, container, swap body or trailer, not accompanied by the driver.



Accompanied transport (Rolling Motorway)
Transport of a complete road vehicle on train, accompanied by the driver.



GENERAL CONSIDERATIONS

A UIRR consignment corresponds to the transport capacity of one lorry on the road (equivalent to 2.3 TEU), meaning :

- one semi-trailer;
- two swap bodies less than 8.30 m and under 16t;
- one swap body more than 8.30 m and over 16t;
- one vehicle on the Rolling Motorway.

The UIRR statistics include only the rail part of the Combined Transport Road-Rail (terminal to terminal).

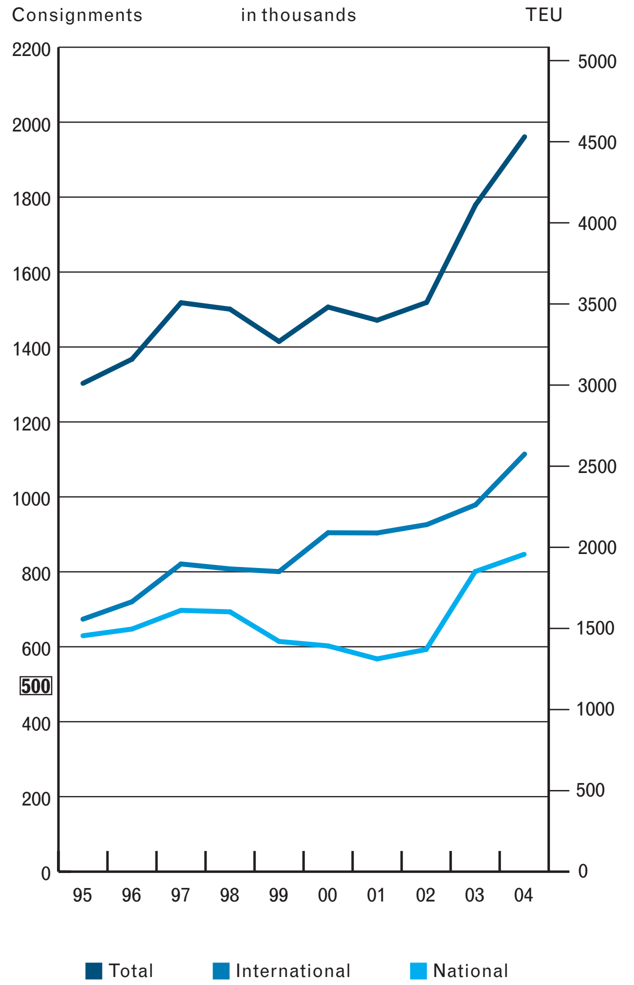
SYMBOLS AND UNITS

TEU	Twenty-foot Equivalent Unit
t	Tonnes
tkm	Tonne-kilometre
Consignments	C
ST	Semi-trailers
SB	Swap-bodies
CT	Container
RoMo	Rolling Motorway

Overview[1]
(in consignments/TEU)

	International			National			Total		
	2003	2004	% 04-03	2003	2004	% 04-03	2003	2004	% 04-03
Unaccompanied	978 915	1 114 364	+14%	800 612	846 775	+6%	1 779 527	1 961 139	+10%
Accompanied	377 348	312 329	-17%	82 308	69 786	-15%	459 656	382 115	-17%
Total CONSIGNMENTS	1 356 263	1 426 693	+5%	882 920	916 561	+4%	2 239 183	2 343 254	+5%
Total TEU	3 119 405	3 281 394	+5%	2 030 716	2 108 090	+4%	5 150 121	5 389 484	+5%

Unaccompanied Transport 1995-2004
(Swap bodies, Containers, Semi-trailers)



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Accompanied Transport 1995-2004
(Rolling Motorway)

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[1] The CNC figures have been incorporated since 2003. The data of the new members Alpe Adria, Conliner and Ralpin are included in these statistics since 2004.

Proportion of CT techniques per UIRR member

INTERNATIONAL TRAFFIC

Techniques	Adria-Kombi		Alpe Adria		Bohemiakombi		Cemat		CNC	
Semi-trailers							40 636	18%		
Swap bodies and containers	14 363	36%	21 548	100%	1 080	7%	176 129	77%	27 832	100%
Rolling Motorway	25 882	64%			13 333	93%	10 726	5%		
SUM in consignments	**40 245**	**100%**	**21 548**	**100%**	**14 413**	**100%**	**227 491**	**100%**	**27 832**	**100%**

Techniques	Combiberia		Conliner		Crokombi		Hungarokombi		Hupac	
Semi-trailers	588	3%					135		22 135	9%
Swap bodies and containers	16 263	97%	56 028	100%	3 520	100%	10 542	21%	212 343	85%
Rolling Motorway							39 891	79%	14 214	6%
SUM in consignments	**16 851**	**100%**	**56 028**	**100%**	**3 520**	**100%**	**50 568**	**100%**	**248 692**	**100%**

Techniques	Hupac NV		Kombi Dan		Kombiverkehr		Novatrans		Ökombi	
Semi-trailers	2 771	6%	622	11%	52 632	14%	2 986	7%	236	
Swap bodies and containers	45 128	94%	4 946	89%	278 170	75%	38 747	93%	25 225	20%
Rolling Motorway					41 488	11%			102 080	80%
SUM in consignments	**47 899**	**100%**	**5 568**	**100%**	**372 290**	**100%**	**41 733**	**100%**	**127 541**	**100%**

Techniques	Ralpin		TRW	
Semi-trailers			4 213	7%
Swap bodies and containers			55 549	93%
Rolling Motorway	64 715	100%		
SUM in consignments	**64 715**	**100%**	**59 762**	**100%**

Techniques	Total UIRR	
Semi-trailers	126 954	9%
Swap bodies and containers	987 410	69%
Rolling Motorway	312 329	22%
SUM in consignments	**1 426 693**	**100%**
SUM TEU	**3 281 394**	**100%**

Proportion of CT techniques per UIRR member

NATIONAL TRAFFIC

Techniques	Adria-Kombi		Alpe Adria		Cemat		CNC		Hupac	
Semi-trailers					2 012	1%			5 168	23%
Swap bodies and containers	11 927	100%	21 743	100%	174 816	99%	177 130	100%	6 421	28%
Rolling Motorway									10 939	49%
SUM in consignments	**11 927**	**100%**	**21 743**	**100%**	**176 828**	**100%**	**177 130**	**100%**	**22 528**	**100%**

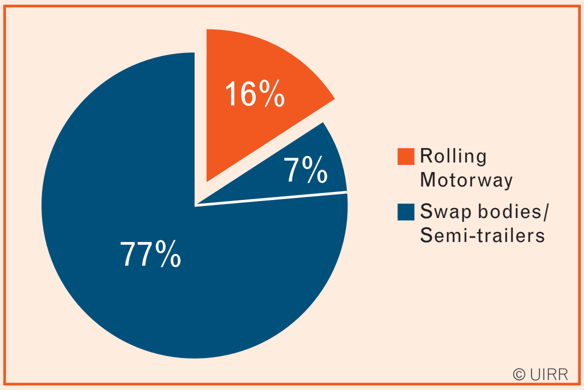
Techniques	Kombi Dan		Kombiverkehr		Novatrans		Ökombi		Rocombi	
Semi-trailers	19	1%	16 461	8%	4 226	3%	100			
Swap bodies and containers	1 881	99%	188 936	92%	148 665	97%	70 239	54%	12 025	100%
Rolling Motorway							58 847	46%		
SUM in consignments	**1 900**	**100%**	**205 397**	**100%**	**152 891**	**100%**	**129 186**	**100%**	**12 025**	**100%**

Techniques	TRW	
Semi-trailers	20	
Swap bodies and containers	4 987	100%
Rolling Motorway		
SUM in consignments	**5 007**	**100%**

Techniques	Total UIRR	
Semi-trailers	28 006	3%
Swap bodies and containers	818 769	89%
Rolling Motorway	69 786	8%
SUM in consignments	**916 561**	**100%**
SUM TEU	**2 108 090**	**100%**

INTERNATIONAL + NATIONAL TRAFFIC

Techniques	Total UIRR	
Semi-trailers	154 960	7%
Swap bodies and containers	1 806 179	77%
Rolling Motorway	382 115	16%
SUM in consignments	**2 343 254**	**100%**
SUM TEU	**5 389 484**	**100%**



International traffic per member company[1] 2000-2004

Company	Number of consignments					
	2000	2001	2002	2003	2004	% '04/03
UNACCOMPANIED TRAFFIC						
Adria Kombi	7 193	6 851	9 137	8 917	**14 363**	**61%**
Alpe Adria					**21 548**	**-**
Bohemiakombi	9 423	6 328	1 749	1 337	**1 080**	**-19%**
BTZ	17 757	18 088	12 546			
Cemat	149 395	156 420	163 428	206 459	**216 765**	**5%**
CNC[2]				29 502	**27 832**	**-6%**
Combiberia	13 142	11 669	12 779	13 714	**16 851**	**23%**
Conliner					**56 028**	**-**
Crokombi	2 005	1 844	1 376	2 005	**3 520**	**76%**
C.T.L.	26 417	14 073	5 482			
Hungarokombi	10 229	11 119	11 589	10 813	**10 677**	**-1%**
Hupac	189 196	197 431	201 450	204 953	**234 478**	**14%**
Hupac NV	26 375	31 760	34 115	36 926	**47 899**	**30%**
Kombi Dan	5 424	6 212	6 479	5 543	**5 568**	**1%**
Kombiverkehr	261 890	259 309	284 977	313 888	**330 802**	**5%**
Novatrans[3]	77 274	72 765	74 659	44 210	**41 733**	**-6%**
Ökombi	32 491	36 208	37 141	37 935	**25 461**	**-33%**
Polkombi	10 572	4 570	372			
Rocombi	315	217	102	4	**0**	**-100%**
Swe-Kombi	7 493	8 065	3 759			
T.R.W.	57 747	60 780	64 601	62 711	**59 762**	**-5%**
SUM	904 338	903 709	925 741	978 915	**1 114 364**	**14%**
ACCOMPANIED TRAFFIC						
Adria Kombi	12 636	13 937	22 774	25 430	**25 882**	**2%**
Bohemiakombi	49 594	41 163	34 059	45 093	**13 333**	**-70%**
Cemat	0	3 034	13 062	12 918	**10 726**	**-17%**
Hungarokombi	51 551	55 477	54 517	51 973	**39 891**	**-23%**
Hupac	41 864	26 086	14 982	12 266	**14 214**	**16%**
Kombiverkehr	112 945	113 484	93 145	98 108	**41 488**	**-58%**
Ökombi	116 278	129 783	143 973	131 560	**102 080**	**-22%**
Polkombi	775	0	0			
Ralpin[4]					**64 715**	**-**
SUM	385 643	382 964	376 512	377 348	**312 329**	**-17%**

International traffic per member company[1] 2000-2004

Company	Number of consignments					
	2000	2001	2002	2003	2004	% '04/03
UNACCOMPANIED + ACCOMPANIED						
Adria Kombi	19 829	20 788	31 911	34 347	**40 245**	**17%**
Alpe Adria					**21 548**	**-**
Bohemiakombi	59 017	47 491	35 808	46 430	**14 413**	**-69%**
BTZ	17 757	18 088	12 546			
Cemat	149 395	159 454	176 490	219 377	**227 491**	**4%**
CNC[2]				29 502	**27 832**	**-6%**
Combiberia	13 142	11 669	12 779	13 714	**16 851**	**23%**
Conliner					**56 028**	
Crokombi	2 005	1 844	1 376	2 005	**3 520**	**76%**
C.T.L.	26 417	14 073	5 482			
Hungarokombi	61 780	66 596	66 106	62 786	**50 568**	**-20%**
Hupac	231 060	223 517	216 432	217 219	**248 692**	**15%**
Hupac NV	26 375	31 760	34 115	36 926	**47 899**	**30%**
Kombi Dan	5 424	6 212	6 479	5 543	**5 568**	**1%**
Kombiverkehr	374 835	372 793	378 122	411 996	**372 290**	**-10%**
Novatrans[3]	77 274	72 765	74 659	44 210	**41 733**	**-6%**
Ökombi	148 769	165 991	181 114	169 495	**127 541**	**-25%**
Polkombi	11 347	4 570	372			
Ralpin[4]					**64 715**	**-**
Rocombi	315	217	102	4	**0**	**-100%**
Swe-Kombi	7 493	8 065	3 759			
T.R.W.	57 747	60 780	64 601	62 711	**59 762**	**-5%**
SUM	1 289 981	1 286 673	1 302 253	1 356 263	**1 426 693**	**5%**

1 In these statistics, the traffic is allocated to the UIRR company which manages, owns or subcontracts the terminal.
2 The calculation of the number of the CNC consignments has been modified in 2004. The figures published in 2003 have thus been adapted on the basis of 2004.
3 In 2003 Novatrans has shifted traffic from its own terminals in Italy to those of Cemat, which reduces the figures for Novatrans and increases the one for Cemat.
4 From 2001, the figures do not include the RoMo traffic of the company Ralpin AG, which became an active member of the UIRR in 2004. It has recorded an increase of 15% compared to 2003.

National traffic per member company[1] 2000-2004

Company	Country	Number of consignments					
		2000	2001	2002	2003	2004	% '04/03
UNACCOMPANIED TRAFFIC							
Adria Kombi	SLO	2 650	4 571	6 540	7 914	**11 927**	**51%**
Alpe Adria	I					**21 743**	**-**
Cemat	I	194 327	162 441	161 506	171 507	**176 828**	**3%**
CNC	F				199 582	**177 130**	**-11%**
Crokombi	HR	8					
Hupac	CH, D, I	4 486	3 487	6 814	8 464	**11 589**	**37%**
Kombi Dan	DK	1 415	1 648	2 416	2 216	**1 900**	**-14%**
Kombiverkehr[2]	D	163 290	161 157	155 165	171 096	**205 397**	**20%**
Novatrans	F, I	176 145	166 285	169 013	152 090	**152 891**	**1%**
Ökombi	A	54 077	60 438	78 083	72 301	**70 339**	**-3%**
Polkombi	PL	588	993	341			
Rocombi	RO	392	1 620	9 900	11 164	**12 025**	**8%**
Swe-Kombi	S	3 589	3 655				
T.R.W.	B	1 347	1 347	2 953	4 278	**5 007**	**17%**
SUM		602 314	567 642	592 731	800 612	**846 775**	**6%**
ACCOMPANIED TRAFFIC							
Hupac	CH	11 708	10 951	10 852	8 629	**10 939**	**27%**
Ökombi	A	63 069	71 638	77 070	73 679	**58 847**	**-20%**
SUM		74 777	82 589	87 922	82 308	**69 786**	**-15%**

National traffic per member company[1] 2000-2004

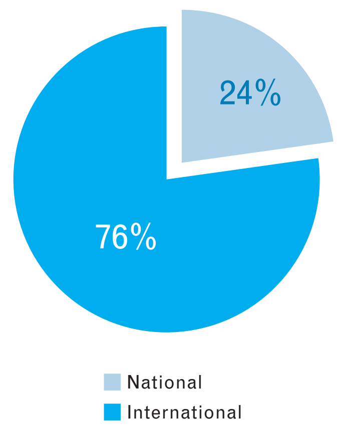
Company	Country	Number of consignments					
		2000	2001	2002	2003	2004	% '04/03
UNACCOMPANIED + ACCOMPANIED							
Adria Kombi	SLO	2 650	4 571	6 540	7 914	**11 927**	**51%**
Alpe Adria	I					**21 743**	**-**
Cemat	I	194 327	162 441	161 506	171 507	**176 828**	**3%**
CNC	F				199 582	**177 130**	**-11%**
Crokombi	HR	8					
Hupac	CH, D, I	16 194	14 438	17 666	17 093	**22 528**	**32%**
Kombi Dan	DK	1 415	1 648	2 416	2 216	**1 900**	**-14%**
Kombiverkehr[2]	D	163 290	161 157	155 165	171 096	**205 397**	**20%**
Novatrans	F, I	176 145	166 285	169 013	152 090	**152 891**	**1%**
Ökombi	A	117 146	132 076	155 153	145 980	**129 186**	**-12%**
Polkombi	PL	588	993	341			
Rocombi	RO	392	1 620	9 900	11 164	**12 025**	**8%**
Swe-Kombi	S	3 589	3 655				
T.R.W.	B	1 347	1 347	2 953	4 278	**5 007**	**17%**
SUM		677 091	650 231	680 653	882 920	**916 561**	**4%**

[1] These figures include gateway traffic (international consignments, which are after an international journey transshipped to a national rail connection)
[2] Kombiverkehr without traffic of Basel (carried out by Railion, but cross-bording)

Traffic volume and performances 2004

Company	Country	National		International	
		Gross tons	Tonne-kilometres	Gross tons	Tonne-kilometres
		t	1000 tkm	t	1000 tkm
Adria-Kombi, Ljubljana	SLO	143 124	22 757	910 760	358 602
Alpe Adria, Trieste	I	344 649	98 280	433 798	97 481
Bohemiakombi, Prague	CZ			233 140	47 526
Cemat, Milano	I	3 588 678	2 906 257	5 117 306	4 066 013
CNC, Vincennes	F	4 275 469		780 372	820 374
Combiberia, Madrid	E			250 909	369 532
Conliner, Rotterdam	NL			1 026 911	714 546
Crokombi, Zagreb	HR			39 341	21 875
Hungarokombi, Budapest	H			1 352 916	829 200
Hupac, Chiasso	CH	585 120	191 149	5 127 835	3 683 959
Hupac, Rotterdam	NL			1 127 909	1 357 115
Kombi Dan, Padborg	DK	14 876	4 634	136 309	177 529
Kombiverkehr, Frankfurt	D	4 295 957	2 238 194	9 778 064	8 261 956
Novatrans, Paris	F	2 530 067	1 836 459	1 055 138	1 013 152
Ökombi, Wien	A	3 247 544	919 792	3 518 083	1 594 773
Ralpin, Bern	CH			2 205 340	954 912
Rocombi, Bukaresti	RO	192 400	109 971		
T.R.W., Bruxelles	B	38 299	10 455	1 621 192	1 804 662
TOTAL		**19 256 182**	**8 337 946**	**34 720 322**	**26 172 969**

Repartition of the traffic performances (tkm)



International relations 2004
(terminal to terminal)

Relations from Country	Relations to Country	Consign-ments C	Consignments-km C*km	Average distance km	Average weight t/C	Gross weight t	Tonne-km 1000 tkm	Techniques, % consignments ST	SB/CT < 8,30m	SB/CT > 8,30m	RoMo
Column number		1	2	3=2/1	4=5/1	5	6 =2*4	7	8	9	10
A	B	637	731 706	1 149	17	10 501	12 062		57%	44%	
B	A	11 597	13 206 206	1 139	12	137 054	156 079		4%	96%	
A	CH	521	363 397	698	19	9 887	6 896		51%	49%	
CH	A	686	489 459	714	20	13 545	9 664		74%	26%	
A	CZ	1	207	414	15	8	3		100%		
CZ	A	55	16 459	302	4	223	68		100%		
A	D	51 197	22 459 377	439	24	1 247 300	547 172	1%	22%	17%	60%
D	A	54 509	33 263 138	610	30	1 618 517	987 671		34%	16%	50%
A	H	38 082	21 394 168	562	30	1 126 403	632 812		1%	2%	97%
H	A	39 154	21 502 484	549	29	1 115 145	612 420	1%	2%	1%	96%
A	I	23 990	6 588 355	275	27	645 205	177 192		37%	15%	48%
I	A	20 215	5 722 831	283	28	562 056	171 135		29%	18%	53%
A	NL	2 310	2 303 493	997	17	38 878	38 777		53%	47%	
NL	A	1 450	1 513 960	1 044	21	30 181	31 512		36%	64%	
A	PL	19	16 496	892	17	307	274		84%	16%	
A	SK	117	36 568	313	29	3 368	1 053		100%		
A	SLO	23 095	7 746 511	335	30	692 388	232 245		1%	1%	99%
SLO	A	28 827	9 224 640	320	26	749 502	239 841		18%		82%
B	CH	16 705	10 438 056	625	22	361 872	226 114		55%	45%	
CH	B	18 037	11 301 153	627	15	269 604	168 921		51%	49%	
B	CZ	29	7 077	244	16	459	112		90%	10%	
CZ	B	51	65 892	1 292	18	893	1 153		100%		
B	D	6 066	3 677 456	606	20	121 181	73 465		59%	41%	
D	B	6 073	3 947 125	650	20	121 880	79 222		53%	47%	
B	E	4 761	6 107 310	1 283	27	129 651	166 313		3%	97%	
E	B	3 541	5 633 622	1 591	14	47 717	75 927		68%	32%	
B	F	12 978	13 582 010	1 047	28	363 967	377 063		16%	84%	
F	B	10 611	10 623 615	1 001	28	296 986	282 007		28%	72%	
B	GR	44	66 490	1 511	26	1 128	1 704		2%	98%	
GR	B	3	7 378	2 951	8	19	56			100%	
B	H	7	10 521	1 503	25	173	260		14%	86%	
H	B	1	683	1 366	24	12	16		100%		
B	I	66 243	72 383 936	1 093	28	1 844 142	2 015 099	7%	19%	74%	
I	B	59 105	62 471 687	1 057	21	1 212 110	1 281 153	8%	27%	65%	
B	LU	371	137 134	370	5	1 854	686		5%	95%	
LU	B	326	118 485	364	20	6 453	2 349		99%	1%	

International relations 2004
(terminal to terminal)

Relations from Country	Relations to Country	Consign-ments C	Consignments-km C*km	Average distance km	Average weight t/C	Gross weight t	Tonne-km 1000 tkm	Techniques, % consignments ST	SB/CT < 8,30m	SB/CT > 8,30m	RoMo
Column number		1	2	3=2/1	4=5/1	5	6 =2*4	7	8	9	10
B	PT	6	12 390	2 065	27	165	340			100%	
B	SLO	267	334 577	1 253	27	7 198	9 020		100%		
SLO	B	245	294 000	1 200	4	980	1 176		100%		
BIH	HR	70	40 670	581	16	1 120	651		100%		
HR	BIH	79	45 899	581	3	237	138		100%		
BiH	SLO	10	7 000	700	2	20	14		100%		
SLO	BiH	27	18 900	700	16	432	302		100%		
BUL	HR	20	27 160	1 358	2	44	60		100%		
CH	D	36 934	26 060 901	706	18	675 258	488 686	15%	64%	16%	5%
D	CH	40 709	28 787 091	707	26	1 058 351	737 432	14%	66%	13%	7%
CH	DK	148	197 798	1 341	28	4 136	5 547	71%	29%		
DK	CH	98	117 269	1 197	24	2 348	2 810	16%	84%		
CH	I	12 341	3 957 366	321	26	315 657	101 221		83%	17%	
I	CH	12 615	4 326 944	343	20	252 161	86 491		78%	22%	
CH	N	233	303 599	1 303	26	5 983	7 796	89%	11%		
N	CH	251	326 402	1 303	25	6 212	8 094	64%	31%	6%	
CH	S	632	842 059	1 333	24	15 286	20 382	95%	4%	1%	
S	CH	484	685 801	1 417	28	13 388	18 970	47%	50%	3%	
CZ	D	13 605	1 945 515	143	16	217 680	31 128		1%	1%	98%
D	CZ	15 089	1 881 127	125	18	272 948	34 028		4%	1%	95%
CZ	H	2	429	286	5	8	2		100%		
H	CZ	40	8 520	213	4	160	34		93%	7%	
CZ	I	379	447 220	1 180	20	7 694	9 079		70%	30%	
I	CZ	455	441 809	972	24	10 665	10 367		77%	23%	
CZ	PL	289	269 348	932	20	5 722	5 333		98%	2%	
CZ	SLO	31	25 376	832	30	906	754		99%	1%	
SLO	CZ	20	16 000	800	11	220	176		100%		
D	DK	1 368	1 146 795	839	22	30 016	25 172	1%	71%	28%	
DK	D	1 370	1 045 960	764	24	32 975	25 176		67%	33%	
D	E	17 294	24 976 197	1 444	26	445 069	642 792	3%	55%	42%	
E	D	13 328	19 265 246	1 446	15	203 680	294 424	4%	51%	45%	
D	F	3 661	4 477 615	1 223	25	90 425	110 610	14%	74%	12%	
F	D	2 644	3 329 037	1 259	16	41 793	52 632	16%	83%	1%	
D	FIN	43	40 764	948	28	1 188	1 126	7%	67%	26%	
FIN	D	16	14 694	948	10	161	153		94%	7%	

Relations from Country	to Country	Consign-ments C	Consignments-km C*km	Average distance km	Average weight t/C	Gross weight t	Tonne-km 1000 tkm	Techniques, % consignments ST	SB/CT < 8,30m	SB/CT > 8,30m	RoMo
Column number		1	2	3=2/1	4=5/1	5	6=2*4	7	8	9	10
D	GR	337	544 181	1 617	25	8 547	13 821		72%	28%	
GR	D	106	128 744	1 220	8	847	1 034		96%	4%	
D	H	10 202	12 763 168	1 251	16	166 347	208 108		36%	64%	
H	D	6 036	7 242 600	1 200	18	108 639	130 367	2%	48%	50%	
D	HR	109	138 657	1 272	28	3 039	3 866		62%	38%	
D	I	234 478	183 070 263	781	29	6 806 997	5 254 242	19%	42%	23%	16%
I	D	225 025	148 588 085	660	23	5 076 095	3 228 304	21%	37%	26%	16%
D	N	1 029	1 176 117	1 143	26	27 212	31 103	17%	57%	26%	
N	D	733	814 085	1 111	20	14 455	16 065	26%	54%	20%	
D	NL	26 794	18 154 039	678	22	578 840	392 176		58%	42%	
NL	D	27 501	17 538 774	638	18	498 022	313 574		52%	48%	
D	P	261	661 019	2 533	27	6 989	17 700		64%	36%	
P	D	110	280 959	2 566	8	846	2 171		94%	6%	
D	PL	6 195	5 946 720	960	25	152 769	146 659		56%	44%	
PL	D	4 746	4 508 700	950	10	45 974	43 675		42%	58%	
D	S	4 403	4 506 273	1 024	26	116 216	118 942	2%	72%	26%	
S	D	2 621	2 941 029	1 122	14	35 305	39 623	2%	74%	24%	
D	SK	348	498 709	1 435	30	10 295	14 775		97%	3%	
D	SLO	1 995	2 454 342	1 230	28	55 604	68 406		88%	12%	
SLO	D	2 398	2 398 000	1 000	9	21 582	21 582		89%	11%	
DK	B	1	1 017	1 017	8	8	8		100%		
DK	I	9 729	14 311 363	1 471	25	245 846	361 640	8%	89%	3%	
I	DK	9 893	14 464 834	1 462	23	229 218	335 163	8%	87%	5%	
DK	N	4	4 374	1 094	13	53	58		100%		
DK	NL	92	74 925	814	8	762	621		85%	15%	
NL	DK	13	10 010	770	22	289	223		100%		
DK	S	336	137 258	409	12	3 939	1 609	1%	86%	13%	
E	F	1 936	3 148 564	1 626	26	50 459	82 063		25%	75%	
F	E	1 211	1 893 413	1 564	23	27 432	42 890		27%	73%	
E	GB	21	37 380	1 780	29	616	1 097		24%	76%	
GB	E	79	130 350	1 650	10	761	1 256		25%	75%	
F	GB	2 982	2 489 487	835	15	45 641	38 103		25%	75%	
GB	F	366	300 108	820	21	7 806	6 401		25%	75%	
F	I	36 021	33 651 857	934	27	986 618	921 740	7%	20%	73%	
I	F	34 178	21 021 855	615	20	681 099	418 930	7%	18%	75%	

International relations 2004

(terminal to terminal)

Relations from Country	Relations to Country	Consign-ments C	Consignments-km C*km	Average distance km	Average weight t/C	Gross weight t	Tonne-km 1000 tkm	Techniques, % consignments ST	SB/CT < 8,30m	SB/CT > 8,30m	RoMo
Column number		1	2	3=2/1	4=5/1	5	6 =2*4	7	8	9	10
GB	I	323	403 750	1 250	29	9 279	11 599		25%	75%	
I	GB	1 760	2 356 782	1 339	24	42 331	56 685		10%	90%	
H	HR	256	151 552	592	11	2 816	1 667		80%	20%	
HR	H	1 960	1 160 320	592	16	31 360	18 565		100%		
H	I	90	84 600	940	18	1 620	1 523		94%	6%	
I	H	463	515 588	1 115	24	10 959	12 217		76%	24%	
H	PL	21	21 218	1 035	4	82	85			100%	
H	RO	13	5 125	410	2	29	12		100%		
H	SLO	4 959	3 263 440	658	25	124 414	81 875		31%	25%	44%
SLO	H	5 075	3 806 250	750	21	106 575	79 931		55%		45%
HR	F	3	4 830	1 610	21	63	101		100%		
HR	I	219	97 893	447	3	657	294		100%		
HR	SK	3	2 604	868	10	30	26		100%		
SK	HR	2	1 350	675	7	14	9		100%		
HR	SLO	1 166	408 100	350	5	5 830	2 041		100%		
SLO	HR	751	262 850	350	16	12 016	4 206		100%		
I	E	588	987 840	1 680	27	15 733	26 431		25%	75%	
I	LU	4	2 450	700	27	94	66		100%		
I	NL	32 341	36 284 657	1 122	21	673 266	755 376	9%	37%	55%	
NL	I	37 036	47 737 612	1 289	26	957 806	1 234 565	8%	47%	47%	
I	PL	55	83 394	1 516	15	830	1 259		24%	76%	
I	RO	65	104 199	1 603	32	2 073	3 323		59%	42%	
I	S	4 913	7 039 570	1 433	22	105 441	151 080	4%	94%	2%	
S	I	3 056	3 814 567	1 248	26	79 089	98 720	8%	88%	5%	
I	SK	17	27 604	1 673	18	298	499		70%	30%	
I	SLO	180	69 540	386	12	2 167	837		33%	67%	
SLO	I	833	291 550	350	2	1 666	583		100%		
SLO	SK	261	182 700	700	5	1 305	914		100%		
SLO	YU	934	560 400	600	13	12 142	7 285		100%		
YU	SLO	864	518 400	600	5	4 320	2 592		100%		
TOTAL		**1 426 693**	**1 089 158 553**	**763**	**24**	**34 720 322**	**26 172 969**	**9%**	**37%**	**32%**	**22%**

Your Partners in Combined Transport

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