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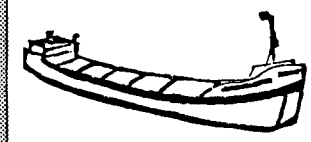

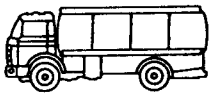

OBSERVATION OF TRANSPORT MARKETS

ANNUAL REPORT
1984

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PRESENTATION OF THE 1984 ANNUAL REPORT

The "Europa Transport" publications present a substantial part of the statistical information on the international intra-Community transport of goods collected under the "Market Observation System".

Three reports are published :

- Analysis and Forecasts
- Annual Report
- Market Developments.

The contents of the following "Annual Report 1984" are as follows :

Chapter 1 : General Assessment and Prospects
All 3 modes.

Chapter 2 : Road

2.1. Intra EUR-10 international road activity in 1984
2.2. Structural analysis of the intra EUR-10 international road haulage market in 1983
2.3. Traffic with Spain and Portugal (tonnages)
2.4. Transport inquiry surveys
2.5. Cost indices
2.6. Price indices.

Chapter 3 : Inland Waterways

3.1. and 3.2. :
Inland Waterways transport activity (1984)
3.3. Inland Waterways transport by commodity groups
3.4. Inland Waterways transport by transport market
3.5. Fleet developments
3.6. Inland Waterways transport by flag
3.7. Transport inquiry survey
3.8. Cost and price indices.

Chapter 4 : Rail

4.2. Intra EUR-10 international activity in 1984
4.3. Breakdown by NST chapters
4.4. Railway Price Indices

Chapter 5 : Combined Transport

5.1. Container transport (1984)
5.2. Piggy-back transport (1984)

CHAPTER 1

General market assessment and prospects - All modes

1.1 Volumes of International transport within the Community

The continuous decline in intra-Community transport since 1979 came to a stop in 1983 and reversed into a significant increase in 1984. Original estimates for 1984 have had to be revised upwards. All modes benefited from the improved economic situation, and in particular the rail and inland waterway sectors. The reason is that these modes have an important market share in the supply to basic industries, like steel and chemicals, where the recovery manifested most clearly. Indeed it was also these sectors that were worst hit by the recent economic downturn.

Total intra-Community transport went up by 6.5%, while the industrial production in the Community increased by 2.8%.

International rail transport recorded a very strong and remarkable growth (+15.0%), being the first positive growth after a series of rapidly declining figures since 1979. The volume of traffic returned to about the level of 1981.

The upward trend in inland waterways, that had already started in 1983 (+3.2%), continued in 1984 (+5.2%). The volume of international traffic is now back on the 1980 level.

The growth rate in road transport which has been around 3% per annum since 1979 (except 1981) increased to 4.9%. However, 1984 is the first year after a very long time series with a negative differential growth in road transport.

Table 1.1 Annual EUR-10 tonnage flows by mode of transport (mio tonnes)

Mode \ Year	1980	1981	1982	1983	1984 (provisional)
Road	168.1	169.7	174.7	180.5 R	189.3
Rail	78.6	70.2	61.3	60.4	69.5
I.W.	190.5	183.6	176.9	182.5 R	192.0
Total	437.2	423.5	412.9	423.4 R	450.8

Table 1.2 Annual growth rates - EUR-10 tonnage flows (%)

Mode \ Year	1980/1979	1981/1980	1982/1981	1983/1982	1984/1983 (provisional)
Road	+ 3.3	+ 0.9	+ 2.9	+ 3.3 R	+ 4.9
Rail	- 5.7	- 10.7	- 12.7	- 1.4	+ 15.0
I.W.	- 2.0	- 3.6	- 3.6	+ 3.2 R	+ 5.2
Total	- 0.7	- 3.1	- 2.5	+ 2.5 R	+ 6.5

Table 1.3 Differential growth rates (Modal growth rate - Total growth rate)

Mode \ Year	1980/1979	1981/1980	1982/1981	1983/1982	1983/1984 (provisional)
Road	+ 4.0	+ 4.0	+ 5.4	+ 0.8 R	- 1.6
Rail	- 5.0	- 7.6	-10.2	- 3.9 R	+ 8.5
I.W.	- 1.3	- 0.5	- 1.1	+ 0.7 R	- 1.3

R = Revised figures.

The fact that the recovery in 1984 in the production of consumer goods and finished products (road market) was not as strong as in the basic industries (rail + I.W. market) explains the declining market share of road in this particular year.

1.2 Modal split

Table 1.4, which gives the annual modal split development, shows the increasing market share of road - mostly at the expense of rail - in the period 1979 till 1983, and the reversal of the trend in 1984.

Table 1.4 Modal split evolution (EUR-10)

Year	Road %	Rail %	I.W. %	Total %
1980	38.4	18.6	43.6	100
1981	40.1	16.6	43.3	100
1982	42.3	14.9	42.8	100
1983	42.6	14.3	43.1	100
1984 (provis.)	42.0	15.4	42.6	100

1.3 Forecast for 1985 (EUR-10 international transport)

Mode	Tonnage 1984 (mio tonnes)	Forecasted growth rate (%)	Expected volumes 1985 (mio tonnes)
Road	189.3	+ 5.3	199.3
Rail	69.5	+ 10.6	76.9
I.W.	192.0	+ 5.1	201.8
Total	450.8	+ 6.0	478.0

According to these forecasts the new trend of 1984 will continue in 1985. However, the figures for rail and inland waterways might be a little optimistic considering the fact that the growth rate in the steel and coal sector in 1985 will probably be not as high as in 1984. Also for inland waterways some traffic during the first quarter of 1985 will have been lost due to the severe frost.

CHAPTER 2

ROAD

2.1 Intra EUR-10 international road activity in 1984

2.1.1 Introduction

International road transport between the Member States continued to grow strongly in 1984 and the increase is provisionally estimated to have been 4.9%. This was up on the previous year (+3.5%) due to higher growth in industrial production (2.8% as against 0.8%). Growth of road transport was however less than rail and inland waterways, so that the share of road transport fell. This was the first time a fall in the share of road transport has been observed since at least 1979.

The more rapid growth in road traffic to and from the peripheral Member States continued in 1984. Inward italian traffic also grew strongly but outward traffic from Italy actually fell. Outward traffic from both Germany and France grew much more strongly than inward traffic.

Data for 1984 at Community level from the Road Directive is not available for several months after the completion of the manuscript for the Annual Report. Comments on 1984 have therefore to be based on national sources.

2.1.2 Analysis by country of hauliers

German hauliers

1984 was a reasonably successful year for German hauliers following their weak performance in the previous year. While overall traffic to and from Germany grew by 3.1% (5.5% outwards, 0.9% inwards), tonnage carried by German hauliers grew marginally faster by 3.3% (6.6% outwards, 0.2% inwards).

Relations with the peripheral Member States grew more rapidly than average and, with increasing shares for German hauliers, tonnages carried increased dramatically (United Kingdom, up 30%). German hauliers captured most of the extra tonnage in the relations with Netherlands and Denmark where German hauliers have traditionally had small shares. With France, however, German hauliers continued to lose market share.

French hauliers

According to French Customs sources, traffic to and from France grew less than the Community average (1.5% inwards, 2.9% outwards).1984 was, however, for French hauliers a reasonably satisfactory year as their market share grew slightly resulting in tonnage increases of 2.0% inwards and 4.5% outwards.

French hauliers saw their share increase in traffic with Germany, Italy and the Netherlands, but decline with Belgium/Luxembourg. The UK market was exceptionally strong (up 18% outwards, up 7% inwards). and, according to UK sources, there was an increase of 40% in French vehicles crossing the Channel.

Italian hauliers

According to provisional Italian foreign trade data, Italian imports by road grew rapidly (up 14%) with Italian hauliers almost maintaining their market share. However, Italian hauliers saw their tonnage fall by 12% for italian exports while foreign hauliers increased their tonnage by 21%; consequently, the Italian market share fell from 56% to 48%. Italian hauliers did however reduce the imbalance between import and export tonnages to 10% as compared to 40% in the previous year.

On the import side, Italian hauliers tonnages increased by more than 25% in traffic from the Netherlands, UK and Greece; however, in the case of Germany and Belgium/Luxembourg the increases were only 1% and 15% respectively. Further in both German and Belgian/Luxembourg markets, other hauliers showed tonnage increases about 15% greater than the Italian hauliers, so that the Italian share fell.

On the export side, the tonnages moved by Italian hauliers fell substantially on all relations (except Denmark) while foreign hauliers recorded substantial increases on all relations. The most substantial difference in performance was noted on the Belgian/Luxembourg market where the Italian hauliers share fell from 62% to 49%.

Dutch hauliers

Although Dutch hauliers continued to dominate the markets with other member States in 1984, NIWO (1) reparts an increase of 6.0% for professional Dutch hauliers on bilateral relations (excluding Belgium/Luxembourg) while the Centraal Bureau voor de Statistiek (CBS) reports an 8.0% increase for own account Dutch hauliers.

On the important German market, Dutch professional hauliers carried an extra 4% according to NIWO and Dutch own account hauliers almost 10% extra according to CBS; however according to German sources, Dutch hauliers only carried an extra 1% in 1984.

On the French market, Dutch professional hauliers carried an extra 4.3% while own account hauliers tonnage was unchanged; according to French sources the Dutch tonnage increased by 5.7% and French hauliers tonnage by 10.5%, so that the Dutch hauliers share was reduced.

The tonnage carried by Dutch hauliers on the remaining (smaller) markets increased by at least 10%, with an increase of 17% for Dutch professional hauliers in traffic with Italy in 1984 (folowing 13% increase in 1983) and 37% in traffic with UK in 1984 (following similar increase in 1983).

Belgian and Luxembourg hauliers

Although the delays in the productions of the Belgian/Luxembourg foreign trade data have been much reduced, this data contains no subdivision by nationality of hauliers. Information on Belgian and Luxembourg hauliers is thus only available from German, French and Italian sources for the relations concerned.

In the case of the German market it is possible to distinguish between the traffic to Belgium and Luxembourg. The market between Belgium and Germany grew by 5%, but with a 1% increase in market share, tonnage carried by Belgian hauliers grew by over 6%. The market between Luxembourg and Germany only grew by 2%, and the Luxembourg hauliers had a marginal reduction of their share.

While the French market only grew by 0.5%, the Belgian and Luxembourg hauliers tonnage grew by about 3%, and their market share by about 1.5%.

On the Italian market, the Belgian and Luxembourg hauliers registered increases of over 30% in each direction.

From this information, it appears that 1984 was quite a successful year for Belgian and Luxembourg hauliers.

(1) NIWO: Nederlandsche Internationale Wegvervoer Organisatie. Annual Report 1984.

United Kingdom

According to provisional results from the 1984 Statistical Directive, tonnages moved by UK hauliers were virtually unchanged, an increase of 3% inwards being offset by a 2% fall outwards. The most notable change was a 18% increase in the UK haulier traffic with Belgium and Luxembourg.

It is not yet possible to check the UK share of the tonnages with partner Member States because of a lack of comparable sources. However the complementary Road Goods Vehicle survey on Ro-Ro ferries shows that the total number of vehicle movements rose by almost 4% in 1984 and this was split into:

UK registered powered vehicles	- 1%
Foreign registered powered vehicles	+ 26%
Unaccompanied semi-trailers (nationality unknown)	- 4%

From these results it is clear that the UK hauliers share of tonnage must have fallen considerably in 1984.

Irish hauliers

Information from Irish sources on total outward Ro-Ro traffic (i.e. excluding traffic with Northern Ireland) and also excluding company owned trailer traffic, shows a very strong overall improvement of 33%. This strong performance was reported on all relations.

Traffic to UK (+ 29%) reversed the small fall in the previous year, while traffic to continental destinations continued to grow rapidly, ranging from France (+ 29%), to Benelux and Germany (+ 49%). The importance of UK as a destination for Irish traffic continued to decline from 45% to 43% of the total for all destinations.

The above comments relate to all hauliers, but as the Irish hauliers account for about 80% of the market, the trends for Irish hauliers must be similar.

Danish hauliers

Information from Danish foreign trade sources shows the growth of imports by road continuing to increase by 11% in 1984, however in 1984 exports by road fell by almost 3%.

Traffic with Germany continued to account for about 60% of Danish intra-Community road transport. However, according to German sources, the Germans increased their tonnage by about 10% in each direction whereas export tonnage carried by Danish hauliers fell by 10% and import tonnage remained almost unchanged. The Danish hauliers thus lost 3% of their share in both directions.

Danish hauliers maintained their share in two markets which increased strongly by 15% (imports from Netherlands and imports from Italy) but lost considerable share on the market with France. In general it appears that 1984 was a slightly disappointing year for Danish hauliers.

Greek hauliers

According to Greek sources, traffic with the other Member States rose by 15% in 1984. Traffic between Greece and Germany, which accounts for just over half of total Greek traffic with the Community rose by 10%, and, according to German sources, the share of Greek hauliers remained unchanged.

Outstanding growth was reported in the market with Italy (Greek exports up 60%, imports up 35%), although Italian sources reported lower growth rates.

Traffic between Greece and France continued to declined by around 5% according to Greek sources.

1984 was thus a fairly successful year for Greek hauliers.

2.2 Structural analysis of the intra EUR-10 international road haulage market in 1983

2.2.1 Introduction

As explained earlier, the data currently available for 1984 are taken from many different sources and do not permit a detailed structural analysis to be carried out with sufficient consistency and reliability.

The most extensive comparable data currently available relate to those collected for the Road Statistical Directive for 1983.

Note that:

a) bilateral traffic is covered by the Directive but that cross-trade traffic is not (= traffic by haulier from Member State A between Member State B and Member State C).

b) Tonnages for Italian hauliers relate to foreign trade statistics; the tonne-kilometres have been estimated assuming that the average distance to each Member State is the same as that of the hauliers from the partner country.

c) Tonnages for Luxembourg hauliers relate to 1982 since the 1983 figures from the Directive have not yet been delivered to the SOEC.

   Tkm for Luxembourg hauliers are estimates based on 1982 Statec statistics.

d) 1981 and 1982 datas for French hauliers (for both national and international traffic) have been revised on basis of correcting factors supplied by the French Ministry of Transport.

e) The figures for the UK are particularly sensitive to the problem of unaccompanied semi-trailers which are not recorded in the road Directive statistics and should consequently be treated with some reserve. Further UK-traffic across the Northern Ireland/Republic of Ireland land boundary is excluded, this exaggerates the apparent share of Irish hauliers both to UK and EUR-10 total (table 2.5).

Table 2.1 Total international bilateral traffic by relation: year 1983 and % evolution on 1982

'000 TONNES

	D	F	I	NL	B	L	UK	IRL	DK	GR	EUR 10
D		9 427 8.8%	4 718 2.7%	15 918 2.1%	7 147 5.7%	773 - 6.3%	636 16.2%	49 145.0%	2 014 9.0%	313 2.3%	40 997 4.7%
F	10 895 - 4.3%		5 155 11.0%	2 392 6.4%	9 157 - 1.5%	455 34.2%	1 659 14.1%	67 42.6%	259 0%	65 -17.7%	30 104 1.2%
I	6 641 10.0%	5 154 - 4.9%		1 000 3.4%	1 108 2.1%	15	1 232 18.7%	65 -21.7%	218 14.7%	304 42.7%	15 737 4.6%
NL	15 739 2.5%	3 722 1.1%	1 336 22.9%		9 094 - 2.6%	179 58.4%	606 19.5%	13 -45.8%	495 10.7%	101 14.8%	31 285 2.1%
B	7 994 9.4%	12 658 - 7.6%	1 054 - 2.7%	12 429 10.5%		1 025 - 2.2%	322 -15.0%	14 16.7%	199 15.7%	36 20.0%	35 731 2.1%
L	1 348 1.7%	651 22.0%	15	193 52.0%	804 20.5%		3 -62.5%			1	3 015 1.2%
UK	530 23.0%	1 045 13.2%	649 36.1%	340 11.8%	214 - 4.9%	4 -60.0%		804 29.1%	117 2.6%	21 16.7%	3 724 19.2%
IRL	41 95.2%	84 20.0%	28 21.7%	12 - 7.7%	9 -35.7%		460 9.8%		5 150.0%	7 0%	646 14.9%
DK	2 752 13.6%	254 - 7.3%	241 0%	337 6.6%	94 1.1%		504 10.0%	14 75.0%		32 - 3.0%	4 228 10.0%
GR	345 2.1%	60 -27.7%	376 216.0%	62 5.1%	19 18.8%	1 0%	15 0%	0 0%	14 - 6.7%		892 37.9%
EUR-10	46 285 3.8%	33 055 - 1.8%	13 572 10.5%	32 683 5.8%	27 646 0.6%	2 452 4.3%	5 439 12.7%	1 026 25.3%	3 321 9.0%	880 14.6%	166 359 3.5%

Table 2.2 International traffic per relation by hauliers registered in the country of unloading: year 1983 and % evolution on 1982

'000 TONNES

	D	F	I	NL	B	L	UK	IRL	DK	GR	EUR 10
D		4 576 6%	2 172 4.8%	11 063 1.4%	3 330 6.8%	402	415 14.6%	38 280.0%	1 188 8.5%	274 4.2%	23 458 7.2%
F	6 708 - 2.8%		2 294 27.2%	1 636 4%	5 501 - 4.9%	153	624 10.2%	61 38.6%	200 5.8%	36 5.9%	17 213 1.0%
I	2 952 10.2%	2 419 - 4.2%		564 14.2%	545 - 1.1%	15	393 37.4%	27 -38.6%	128 19.6%	94 19.0%	7 137 5.3%
NL	3 922 1.7%	1 198 0.7%	550 38.9%		2 174 6.4%	25	289 5.9%	10 -54.5%	187 8.1%	89 21.9%	8 444 4.9%
B	3 400 7.4%	4 500 -19.7%	413 6.7%	7 894 7.9%		559	303 -13.4%	11 -8.3%	148 8.8%	36 20.0%	17 264 - 1.7%
L	971 2.3%	476 -27.9%		118 126.9%	393 53.5%		3 -62.5%	0		1 0%	1 962 1.9%
UK	134 41.1%	497 19.2%	279 32.9%	117 34.5%	5 -64.3%	0		679 30.8%	112 2.8%	10 0%	1 833 25.5%
IRL	7 16.7%	13 225.0%	11 10.0%	2 0%		0	54 12.5%		3 50.0%	0	90 28.6%
DK	685 14.2%	32 -40.7%	56 -12.5%	222 5.2%	26 23.8%	0	4 -42.9%	2		10 0%	1 037 7.2%
GR	31 -18.4%	15 -55.9%	291 506.3%	6 -33.3%		0	1 -50.0%	0	9 0%		353 148.6%
EUR-10	18 810 2.8%	13 726 - 2.9%	6 066 21.6%	21 622 4.7%	11 974 1.6%	1 154	2 086 9.7%	828 26.8%	1 975 8.5%	550 10.0%	78 791 3.8%

Table 2.3 International traffic per relation by hauliers registered in the country of loading: year 1983 and % evolution on 1982

'000 TONNES

	D	F	I	NL	B	L	UK	IRL	DK	GR	EUR 10
D		4 851 - 3.4%	2 546 0.9%	4 855 3.6%	3 817 4.8%	371 -12.3%	223 19.3%	11 10.0%	826 9.8%	39 - 9.3%	17 539 1.5%
F	4 187 - 6.5%		2 861 0.7%	757 12.1%	3 656 4.1%	302 62.4%	1 035 16.6%	6 100.0%	59 -16.9%	30 -31.8%	12 893 1.5%
I	3 689 9.9%	2 735 - 5.5%		436 - 7.8%	563 5.4%		839 11.6%	38 - 2.6%	90 8.4%	210 56.7%	8 600 4.1%
NL	11 817 2.8%	2 524 1.4%	786 13.7%		6 920 - 5.1%	154 75.0%	317 34.9%	3 50.0%	308 12.4%	12 -20.0%	22 841 1.2%
B	4 594 10.9%	8 157 0.7%	641 - 7.9%	4 536 15.2%		466 - 4.7%	19 -34.5%	3 0%	51 41.7%	0	18 467 6.0%
L	377	175	15	75	411		0	0	0	0	1 053
UK	396 17.9%	548 8.3%	370 38.6%	223 2.8%	209 - 0.9%	4 -60.0%		125 20.2%	5 0%	11 37.5%	1 891 13.6%
IRL	34 126.7%	71 7.6%	17 30.8%	10 -23.1%	9 -35.7%	0	406 9.4%		2 0%	7 0%	556 13.0%
DK	2 067 13.4%	222 0.9%	185 4.5%	115 9.5%	68 - 4.2%		499 10.6%	12 50.0%		22 - 4.3%	3 190 10.9%
GR	314 4.7%	45 - 8.2%	85 19.7%	56 12.0%	19 18.8%	1 0%	14 7.7%		5 -16.7%		539 6.7%
EUR-10	27 475 4.4%	19 328 - 1.0%	7 506 2.9%	11 063 8.1%	15 672 - 0.2%	1 298 8.5%	3 352 14.6%	198 19.3%	1 346 9.7%	331 24.0%	87 569 3.2%

Table 2.4 Shares of the market held by hauliers from EUR-10 on intra EUR-10 international journeys

Tonnages

Member State	Inward + outward tonnage ('000 tons) 1983	% change 83/82R	Share % 1983	Share % 1982R
D	36 349	+ 2.2	21.9	22.1
F	26 619	- 0.8	16.0	16.7
I	14 666	+ 10.7	8.8	8.2
NL	44 462	+ 2.9	26.7	26.9
B	30 441	+ 4.2	18.3	18.2
L	2 207	NC	1.3	1.4
UK	3 977	+ 11.4	2.4	2.2
IRL	1 384	+ 21.1	0.8	0.7
DK	5 165	+ 10.0	3.1	2.9
GR	1 089	+ 8.3	0.7	0.6
EUR-10	166 359	+ 3.5	100	100

Table 2.4 shows modest increases for German, Dutch and Belgian hauliers with hauliers from other Member States having above average increases (8-12%) and Irish hauliers registering an impressive 21% increase. These results were in contrast to the previous year where Italian showed declining tonnages and the German, Dutch and Belgian hauliers all had above average increases. The market shares in 1983 remained broadly to the 1982 levels.

Table 2.5 Percentage share of traffic (in tonnes) held by hauliers from "origin" Member States (1) (2)

From \ To	Year	D	F	I	NL	B	L	UK	IRL	DK	GR	Total EUR - 10
D	81		51	50	32	52	54	26	55	36	17	42
	82	-	58	55	30	54	51	34	50	41	14	44
	83		52	54	31	53	-	35	22	41	13	43
F	81	47		63	35	45	45	58	0	23	66	48
	82	39	-	61	30	38	55	61	6	27	56	43
	83	38		56	32	40	-	62	9	23	46	43
I	81	60	50		48	50		73	74	44	74	56
	82	56	53	-	49	49		73	47	44	63	55
	83	56	53		44	50		68	59	41	69	55
NL	81	75	67	58		75	71	41	4	59	31	73
	82	75	68	64	-	78	78	46	8	61	17	74
	83	75	68	59		76	-	52	23	62	12	73
B	81	59	57	66	36		46	15	0	18	0	50
	82	57	59	64	35	-	47	8	0	21	0	50
	83	58	64	61	37		-	6	21	26	0	52
L	81	26	34		66	57		0	0			38
	82	28	21		59	62	-	0	0			36
	83	-	-		-	-		-	-			-
UK	81	83	58	56	77	91	100		29	7	57	59
	82	78	55	56	71	94	100	-	17	4	44	53
	83	75	52	57	66	98	-		16	4	52	51
IRL	81	85	82	44	88	100	-	86		0	-	84
	82	71	94	57	100	100	-	89	-	0	-	88
	83	83	85	61	83	100	-	88		40	100	86
DK	81	81	78	69	41	78		99	100		77	79
	82	75	80	73	33	76		99	100	-	70	75
	83	75	87	77	34	72		99	86		69	76
GR	81	84	66	73	76	100		81	-	33		79
	82	89	59	60	85	100		87	-	40	-	78
	83	91	75	23	90	100		93	-	36		60
EUR-10	81	62	55	58	35	58	50	59	31	37	46	53
	82	59	58	59	33	57	51	61	20	40	35	53
	83	59	59	55	34	57	-	62	19	41	38	53

Since table 2.5 only relates to "bilateral" traffic, the sum of the shares of traffic held by hauliers from the "origin" and "destination" country is necessarily 100%; hence the shares of traffic by hauliers from "the destination" country can be obtained by substracting the share held by the "origin" country in table 2.5 from 100%. Example D hauliers have 62% of the traffic from F to D and 41% of the EUR-10 traffic to D (in 1983).

(1) Italian, Danish and Greek data give no breakdown between Belgium and Luxembourg; in compiling the marginal EUR-10 totals, the traffic for these 3 Member States is assumed to be with Belgium.

(2) This table includes revised French figures for 81 and 82.

(3) As the 1983 Luxemboug data is not available, the shares for 1983 for relations involving Luxembourg are not shown; the 1982 Luxembourg figures have been used for calculating the 1983 EUR-10 totals.

Table 2.6. Outward/Inward tonnage ratios by country of haulier

Nationality of haulier	Ratio OUT/IN 1982R	1983
D	.95	.93
F	.90	.94
I	1.66	1.42
NL	1.09	1.06
B	1.48	1.54
(L)	.91	.91
UK	.87	.91
IRL	.75	.67
DK	1.58	1.62
GR	1.01	.98
EUR-10	1.12	1.11

In 1983, the OUT/IN ratios were in balance for the following countries: D, F, NL, UK, GR.
A significant excess of the outward tonnage continued for I, DK and B, while the excess of inward tonnage was intensified for Ireland.
Compared with 1982, the main changes of the OUT/INW-ratios were as follows:

Country	Change 83-82	Explanation
I	- 14	increase of inwards
IRL	- 9	increase of inwards

Shares of the road haulage market held by own account operators

The results from the Road Statistical Directive give a breakdown between "hire and reward" and "own-account" operators.
Table 2.7. gives the share, in tonnes, for own-account hauliers.
The Italian foreign trade data does not contain such a breakdown.

Table 2.7. Share of market held by own-account operators on intra-community journeys.

Country of haulier	Inwards from EUR 1983	Ouwards to EUR 1983	Inw. + Outw. own account 1983	Share in % of own account tonnage 1983	1982R	1981R
D	3633	3164	6797	18.7	18.9	19.6
F	2006	2901	4907	18.4	20.0	18.4
I	NA	NA	NA	NA	NA	NA
NL	2813	3845	6658	15.0	16.5	17.6
B	3529	5852	9381	30.8	33.9	34.4
L	NA	NA	NA	NA	-	NA
UK	305	197	502	12.6	15.1	12.9
IRL	402	153	555	40.1	43.8	35.3
DK	170	351	521	10.1	12.1	11.8
GR	0	0	0	0	0	0
Total	12858	16463	29321	19.6	21.2	21.3

The total share of own-account operators continues to decline for all Member States considered. Only the German share of own-account remained quite stable.

Table 2.8. International bilateral intra EUR-10 traffic in tonnes-kilometres. Year 1983 and % evolution on 1982.

Mio tkm

	D	F	I	NL	B	L	UK	IRL	DK	GR	EUR-10
D	-	4205	4417	4695	2244	146	514	60	1100	741	18122
		-1.7%	0.8%	6.9%	5.1%	-5.2%	16.6%	172.7%	10.0%	5.3%	3.5%
F	4689	-	4546	1465	2883	80	1091	60	324	165	15303
	-2.5%		10.3%	6.2%	3.6%	-15.8%	12.2%	57.9%	5.5%	-18.7%	4.1%
I	6397	4386	-	1398	1397	16	2054	108	371	414	16541
	8.6%	-6.8%		2.3%	-0.4%		25.2%	-18.8%	15.2%	34.4%	4.8%
NL	5419	2186	1980	-	1421	54	296	11	360	326	12053
	5.4%	2.5%	26.0%		-5.2%	500.0%	26.0%	-50.0%	10.1%	38.1%	7.9%
B	2703	3233	1335	1636	-	200	135	14	178	99	9533
	6.7%	-0.8%	-4.7%	-1.8%			-15.1%	-6.7%	13.4%	26.9%	0.7%
L	235	83	20	54	118	-	2	0	0	4	516
	4.0%	-25.9%		42.1%	13.5%		-60.0%			33.3%	1.6%
UK	416	666	1066	167	104	2	-	155	128	75	2779
	17.8%	10.4%	37.2%	13.6%	3.0%	-60.0%		28.1%	4.1%	41.5%	21.7%
IRL	43	88	56	10	7	0	126	-	7	10	347
	115.0%	66.0%	75.0%	-9.1%	-50.0%		15.6%		133.3%	0%	43.4%
DK	1182	305	406	241	82	0	552	23	-	96	2887
	12.3%	-3.8%	-0.5%	6.2%	-1.2%		10.4%	76.9%		4.3%	7.2%
GR	875	170	549	211	55	2	48	0	42	-	1952
	12.2%	-22.0%	217.3%	34.4%	34.1%	100.0%	4.3%		0%		33.2%
Total	21959	15322	14375	9877	8311	500	4818	431	2510	1930	80033
	5.5%	-2.3%	11.6%	5.3%	1.8%	4.2%	17.3%	15.9%	10.0%	15.1%	5.5%

Table 2.9. International traffic per relation by hauliers registered in the country of unloading. Year 1983 and % evolution on 1982.

Mio tkm

	D	F	I	NL	B	L	UK	IRL	DK	GR	EUR-10
D	-	1739	2033	3461	1083	59	360	47	713	648	10143
		-4.0%	2.9%	8.7%	6.7%		14.6%	327.3%	8.5%	7.3%	5.3%
F	2588	-	2023	957	1549	32	458	57	240	107	8011
	1.3%		22.2%	3.9%	1.9%		13.1%	72.7%	5.7%	9.2%	7.6%
I	2844	2059	-	789	688	16	655	45	218	128	7442
	8.8%	-3.2%		14.0%	-3.6%		44.9%	-28.6%	19.8%	11.3%	6.7%
NL	1056	756	815	-	266	8	156	9	131	293	3490
	3.5%	5.7%	43.5%		-11.0%		12.2%	-55.0%	8.3%	52.6%	13.2%
B	1133	1200	523	1081	-	105	127	11	134	99	4413
	6.7%	-9.1%	5.0%	-0.3%			-14.8%	-26.7%	8.9%	26.9%	-0.5%
L	162	41		33	55	-	2	0	0	4	297
	5.9%	-41.4%		94.1%	34.1%		-60.0%			33.3%	2.8%
UK	85	257	459	51	2	0	-	103	123	33	1113
	37.1%	10.8%	34.2%	37.8%	-60.0%			35.5%	2.5%	6.5%	23.0%
IRL	8	16	22	2	0	0	22	-	6	0	76
	14.3%	220.0%	57.1%	0%			0%		100.0%		49.0%
DK	231	38	92	160	21	0	3	3	-	29	577
	13.8%	-28.3%	-14.8%	4.6%	16.7%		-25.0%	0%		20.8%	2.5%
GR	75	30	425	16	0	0	3	0	27	-	576
	-17.6%	-61.5%	507.1%	-33.3%			-40.0%		-3.6%		89.5%
Total	8182	6136	6392	6550	3664	220	1786	275	1592	1341	36138
	5.3%	-4.3%	22.2%	7.2%	1.4%		19.5%	21.7%	9.0%	17.1%	7.3%

Table 2.10 International traffic per relation by hauliers registered in the country of loading. Year 1983 and % evolution on 1982.

Mio tkm

	D	F	I	NL	B	L	UK	IRL	DK	GR	EUR-10
D	-	2466	2384	1235	1161	87	153	13	387	94	7980
		0.1%	-0.9%	2.4%	3.7%	-8.4%	21.4%	18.2%	12.8%	-6.0%	1.4%
F	2101	-	2523	508	1334	48	633	3	84	58	7292
	-6.7%		2.4%	10.7%	5.5%	-23.8%	11.6%	-40.0%	3.7%	-44.8%	0.4%
I	3553	2327	-	609	709	-	1399	63	153	286	9099
	8.5%	-9.7%		-9.6%	3.1%		17.8%	-10.0%	9.3%	48.2%	3.3%
NL	4363	1431	1165	-	1155	46	140	2	229	34	8565
	5.8%	0.9%	16.0%		-3.8%	500.0%	45.8%	0%	11.2%	-22.7%	5.8%
B	1569	2033	812	556	-	95	8	3	45	0	5121
	6.6%	4.7%	-10.1%	-4.6%		0%	-20.0%	0%	32.4%		1.6%
L	73	42	20	21	63	-	0	0	-	-	219
UK	330	409	607	115	102	2	-	52	4	42	1663
	13.4%	10.2%	39.5%	4.5%	6.3%	-60.0%		15.6%	33.3%	90.9%	20.7%
IRL	35	72	34	8	7	0	104	-	1	10	271
	169.2%	50.0%	88.9%	-27.3%	-50.0%		19.5%		0%	0%	41.9%
DK	951	267	314	81	61	0	549	20	-	67	2310
	12.0%	1.1%	4.7%	9.5%	-4.7%		10.7%	53.8%		-1.5%	8.6%
GR	800	140	124	195	55	2	46	0	15	-	1377
	16.1%	0%	20.4%	46.6%	34.1%	100.0%	12.2%		15.4%		18.6%
Total	13775	9187	7983	3328	4647	280	3032	156	918	591	43897
	5.7%	-0.9%	4.3%	1.7%	2.1%	7.7%	16.1%	6.8%	12.0%	11.1%	4.1%

Table 2.11. Tonne-kilometres achieved by country of haulier on international intra EUR-10 traffic.

Mio tkm

Member States	Inward + Outward Mio tkm 1983	1982	% change 83/82	Share % 1983	1982
D	16162	15638	+3.4	20.2	20.6
F	13428	13673R	-1.8	16.8	18.0
I(E)	15491	14037	+10.4	19.4	18.5
NL	15115	14206	+6.4	18.9	18.7
B	8785	8650	+1.6	11.0	11.4
L(E)	439	439	N.C.	0.5	0.6
UK	3449	2873R	+20.0	4.3	3.8
IRL	546	417	+30.9	0.7	0.5
DK	3902	3589	+8.7	4.9	4.7
GR	2718	2306	+17.9	3.4	3.0
EUR-10	80035	75828	+5.5	100	100

Table 2.12. % share of own account operators of traffic expressed in tonnes-kilometres.

Member States	Imports (Mio tkm)	Exports (Mio tkm)	IMP. + EXP. Own account	% share Own Ac. 1983	1982R
D	1043	883	1926	11.9	12.2
F	581	966	1547	11.5	11.5
I	NA	NA	NA	NA	NA
NL	522	1225	1747	11.6	11.5
B	971	1413	2384	27.1	30.5
L	NA	NA	NA	NA	-
UK	190	108	298	8.6	11.7
IRL	50	38	88	16.1	14.6
DK	133	278	411	10.5	13.1
GR	0	0	0	0	0
Total	3490	4911	8401	13.1	14.1

The same pattern as for the tonnes (see table 2.7) can be noted.

2.3. Traffic with Spain and Portugal - Tonnages

Due to the provision of data by the Spanish and Portuguese authorities a more comprehensive analysis of goods movements between EUR-10 and Spain and Portugal can be given than in the previous Annual Report which was restricted to tonnages carried by EUR-10 hauliers.

As in the previous sections, the analysis is restricted to bilateral traffic, i.e. cross-trade traffic is excluded.

2.3.1. Traffic with Spain (E)

Table 2.13. Tonnages carried by EUR-10 and Spanish hauliers to and from Spain (000's tonnes)

Bilateral relation	1982		1983	
	Hauliers from		Hauliers from	
	EUR-10	Spain	EUR-10	Spain
D -E	604	537	738	
F -E	1291	2926	1535	
I -E	331	252	406	
NL -E	120	251	121	
B -E	341	199	336	
L -E	-	41	-	
UK -E	104	232	112	
IRL-E	-	18	21	
DK -E	48	10	42	
GR -E	1	2	1	
Total	2840	4468	3312	4965 est.
of which to Spain	1566	1477	1682	
from Spain	1274	2991	1630	
		Total	+ 17%	+ 11%
Growth Rates 83/82		to Spain	+ 7%	
		from Spain	+ 28%	

Total traffic between the EUR-10 and Spain is thus estimated to have increased from 7.308.000 to 8.277.000 tonnes (up 13%) from 1982 to 1983; this was much higher than the intra EUR-10 growth rate (up 3.5%). The share of EUR-10 hauliers in the market with Spain grew from 38.9% in 1982 to an estimated 40.0% in 1983.

2.3.2. Traffic with Portugal (P)

Table 2.14. Tonnage carried by EUR-10 and Portuguese hauliers to and from Portugal (000's tonnes)

Bilateral relation	1982		1983	
	Hauliers from		Hauliers from	
	EUR-10	Portugal	EUR-10	Portugal
D -P	54	91	66	110
F -P	226	118	252	176
I -P	NA	73	80	76
NL -P	27	14	28	19
B -P	0	20	0	31
L -P	-	1	-	1
UK -P	10	21	11	24
IRL-P	-	-	0	-
DK -P	5	2	12	2
GR -P	0	-	0	-
Total	322 (excl.I)	340	449	439
of which to Portugal	202 (excl.I)	171	266 (215 excl.I)	221
from Portugal	120 (excl.I)	169	183 (154 excl.I)	218
		Total	+ 15% (excl.I)	+ 29%
Growth Rates 83/82		to Portugal	+ 6% (excl.I)	+ 29%
		from Portugal	+ 28% (excl.I)	+ 29%

Total traffic between EUR-10 (excluding Italy) and Portugal thus rose from 589.000 to 732.000 tonnes (up 24%) from 1982 to 1983 and the level was 888.000 tonnes in 1983 if traffic with Italy is included. The share of EUR-10 (excluding Italian) hauliers in the market with Portugal fell from 55% in 1982 to 50% in 1983; for 1983 the share of EUR-10 (including Italian) hauliers was 51%.

2.3.4. Traffic between Spain and Portugal

Table 2.15. Tonnage carried by Spanish and Portuguese hauliers in traffic between Spain and Portugal (000's tonnes)

Bilateral relation	1982		1983	
	Hauliers from		Hauliers from	
	Spain	Portugal	Spain	Portugal
Spain to Portugal	197	124	N.A.	73
Portugal to Spain	64	128	N.A.	132
Total	261	252	N.A.	205

Traffic between Spain and Portugal was evenly divided between Spanish and Portuguese hauliers in 1982, but the Spanish hauliers traffic was very unbalanced by direction. In 1983 Portuguese hauliers traffic fell, entirely due to a 40% drop in return loads.

2.4 Transport Inquiry Surveys - Road

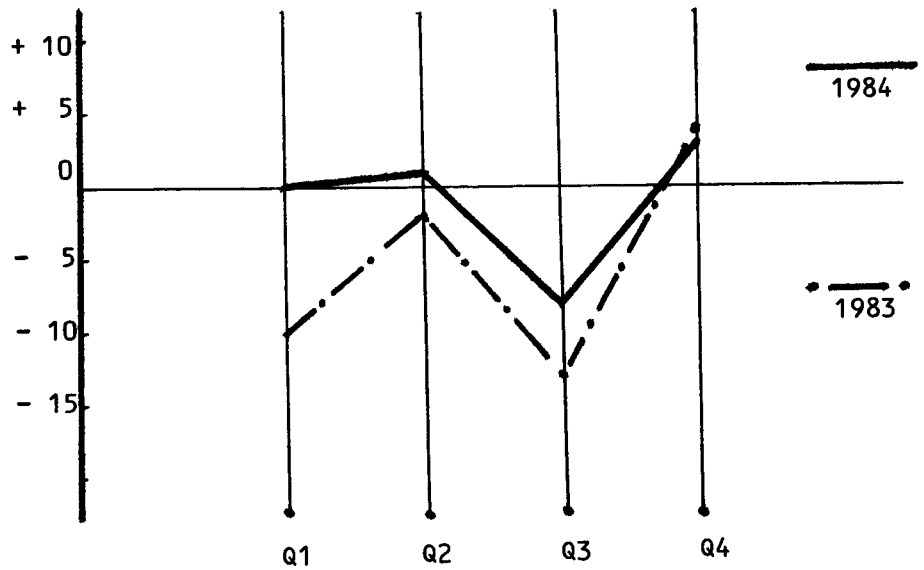
2.4.1 Introduction

The principal aim of the quarterly inquiry with road hauliers is to have rapid information about the changes in activity in the road haulage sector, given the important time-lag from which transport statistics suffer. The transport survey does not only provide information about the activity level of the last quarter, it also reports on the expectations of hauliers concerning future activity.
Last but not least, a set of important economic indicators, reflecting the working-conditions of the haulier-firms, are also provided.
However, since the figures published in this chapter reflect opinions, their value is only indicative.

2.4.2 Transport activity

In 1984 the situation of road transport has been characterized by an increase in activity. However, in the last quarter of 1984, as well as in the first quarter of 1985, a non-significant decrease in activity has been reported.
To avoid seasonal effects, comparison is made between figures that relate to the corresponding quarter the year before.
The average change for the year as a whole indicates an improvement of + 4.3%
Only in the case of Germany, the Netherlands and Luxembourg, there is a drop in reported activity.

Fig. 2.1. Change in the activity level of the firms, expressed as an aggregate balance-of-opinion (percentage difference between numbers expressing opposite views).



2.4.3 Economic indicators

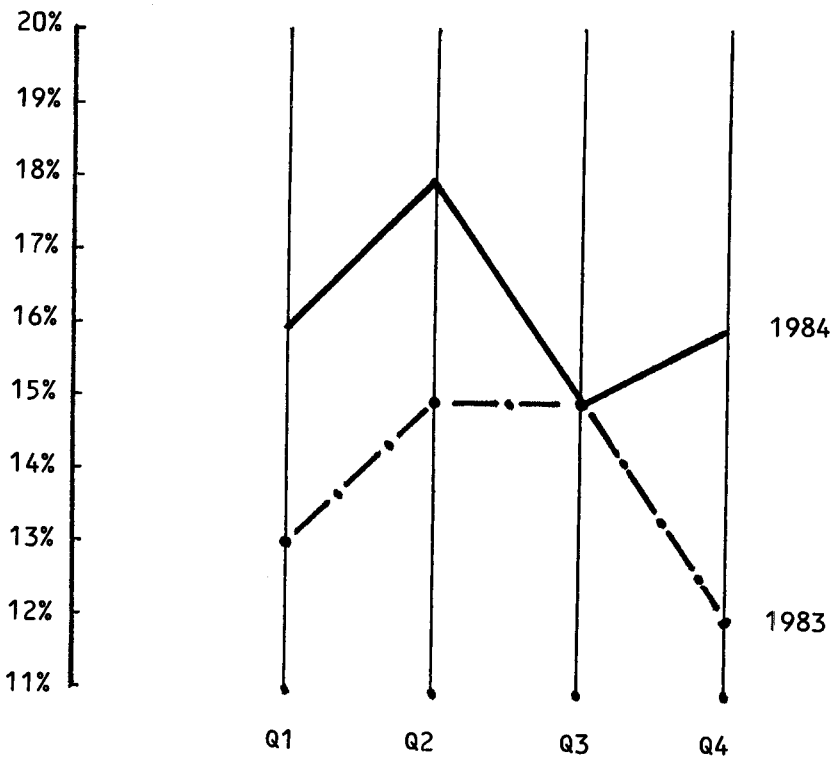
Three economic indicators are comprised in the inquiry, i.e. :

- recruitment,
- liquidity,
- investment.

a) Recruitment

The average percentage of firms declaring they have recruited drivers, has increased during 1984 in comparison to 1983.

Fig. 2.2. Percentage change in the number of firms stating they had recruited drivers.



Reviewing the quarterly figures for the year 1984 reveals :

in each of the four quarters of 1984 the number of firms having recruited drivers was higher or equal (third quarter) than in the corresponding quarter of 1983;

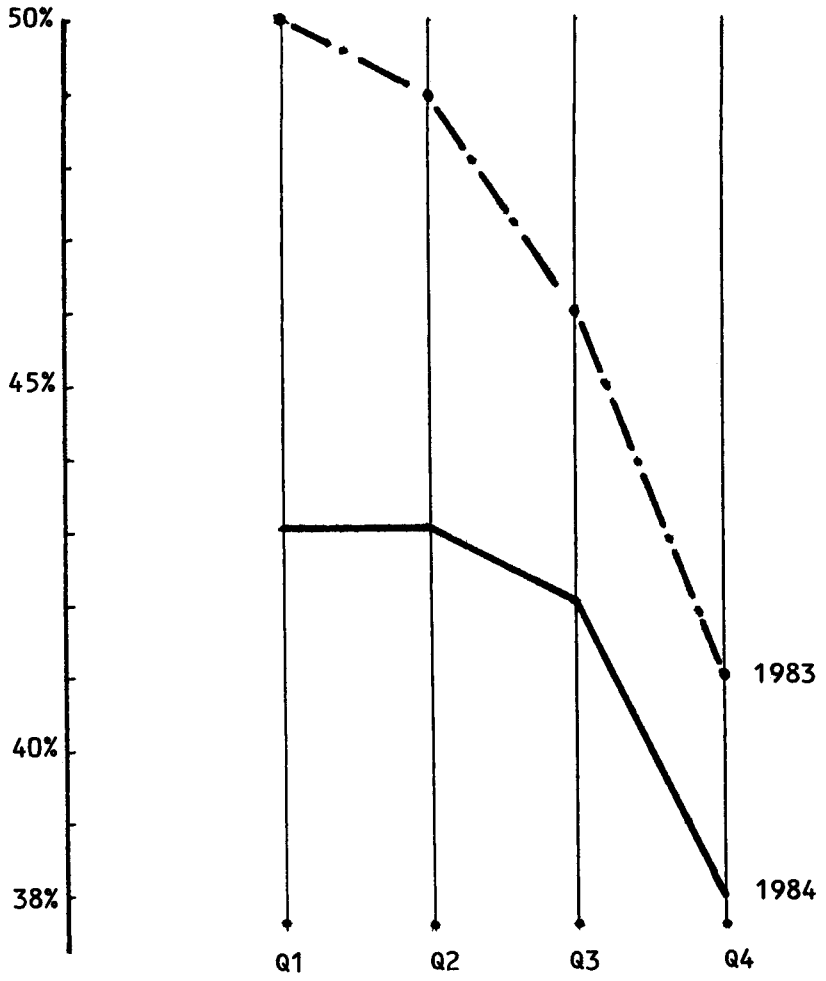
in the fourth quarter of 1984 and the first quarter of 1985, the recruitment of drivers is 4% higher on average;

in Italy recruitment of drivers was lower than in 1983 for each quarter of 1984;
in Ireland the recruitment of drivers has increased quite sharply during the second semester of 1983.

b) Liquidity

The number of firms indicating liquidity problems has fallen during 1983.
The average annual percentage of firms stating they had liquidity problems was 41.5% in 1984 (on average), compared to 46.5% the year before.

Fig. 2.3 Percentage change in the number of firms stating they had liquidity problems.



(3)

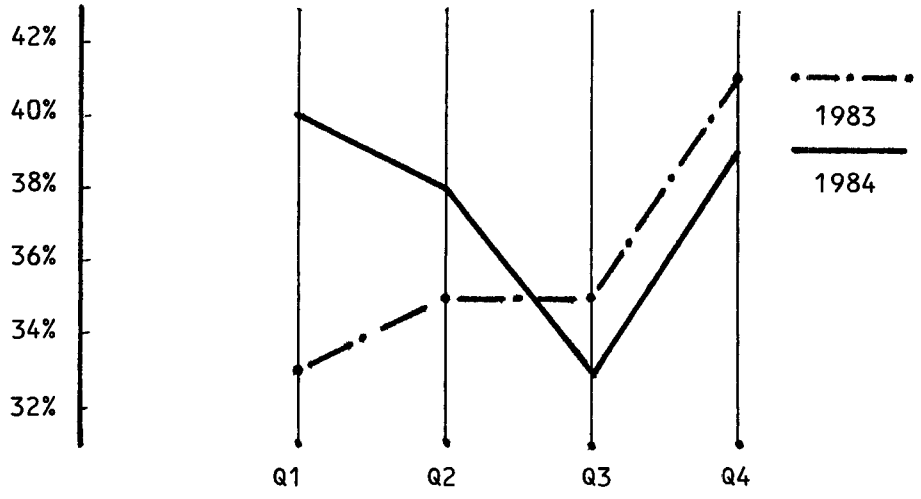
The liquidity problems vary from one Member State to the other.
Liquidity problems were more important in 1984 in France (54.8%), Italy (66.3%) and Greece (59.3%). However, for each of those countries there appears to be an improvement in the situation as compared to 1983. In the case of Luxembourg however, the percentage of firms indicating liquidity problems has increased from an average of 19.3% in 1983 to 32.0% in 1984. The tendency was continued during the first quarter of 1985.

c) Investment

The upswing in investment activity that took place in 1984, reflects the expectations of the hauliers that the economic climate is improving.
Indeed, all hauliers, with the exception of the German, Belgian and Greek, have declared more investment in 1984 than in 1983.

For the first quarter of 1985, Germany, France, the Netherlands, the United Kingdom, Ireland and Greece show a lower volume of demand than in the corresponding quarter of the previous year.

Fig. 2.4. Percentage change in the number of firms stating that they had invested.



2.5. Cost Indices Road

In 1984 detailed data were gathered from 7 Member States, Greece, Ireland and Italy not yet being included. Fuel cost and total cost have been examined separately in the quarterly reports. Some more key cost categories are examined in 1984 annual report, such as wage, repairs, depreciation, taxes and interest.

The table below (table 2.16.) gives the percentage cost changes for the last years while the graphics figures (2.5 - 2.14) give the development of the same cost categories for a longer period.

Table 2.16.

	Inflation in NC	Wages in NC	Repairs in NC	Depreciation in NC	Taxes in NC	Interest in NC	Fuel in NC	Total costs in NC	Total costs in ECU
D 82	4.6	4.3	3.1	6.0	0.3	-13.7	- 0.9	2.4	9.0
83	2.5	3.2	2.9	2.2	0.0	- 6.7	- 4.4	1.1	2.9
84	2.6	2.7	2.2	3.4	0.0	-11.9	5.9	1.9	2.9
NL 82	4.2	5.5	5.4	4.6	0.0	-25.4	- 0.6	2.5	8.6
83	2.9	0.6	3.0	2.1	0.8	- 4.0	- 1.7	0.7	0.5
84	2.4	2.3	1.8	5.5	0.2	- 4.9	- 4.4	1.3	2.0
B/ 82	8.1	7.9	6.1	21.0	0.0	- 1.7	5.4	9.0	0.7
L 83	7.1	4.7	4.3	9.3	0.5	- 1.7	8.6	6.1	1.9
84	5.4	6.5	5.6	2.6	4.5	- 1.0	0.0	3.6	8.1
F 82	9.7	15.3	14.2	9.3	3.6	5.4	17.2	13.8	8.5
83	9.2	11.8	6.7	11.4	8.4	- 1.3	1.1	8.7	2.6
84	6.8	5.4	8.0	10.0	0.7	1.7	10.2	7.0	7.9
UK 82	5.4	6.6	7.4	5.9	21.7	- 2.0	11.5	8.4	7.1
83	5.3	4.5	5.2	2.7	22.9	0.0	- 0.7	4.3	3.3
84	4.5	5.0	5.8	4.5	8.1	0.0	11.2	6.0	0.2
DK 82	9.0	10.3	12.7	10.3	3.9	3.3	18.0	11.6	10.2
83	6.0	0.0	5.9	6.3	0.7	- 6.9	- 9.7	-0.8	-1.8
84	5.6	7.1	8.7	8.2	0.0	10.0	4.8	7.1	9.4

NC = national currency

2.5.1. Development of the different costs in national currency in 1984 by Member State

Wages in NC
In 1984, due to the economic crisis, wages only increased slightly in Germany and the Netherlands. In France, wages increased more but less than the inflation rate. In Denmark, wages increased by 7.1%, but it is the first increase since 1.1.83. Since 1.1.82, wages increased the most in France (+ 36,8).

Repairs in NC
In 1984, repairs costs increased slightly in Germany and the Netherlands but less than in 1983. Compared with the 1.1.82 (index 100) repair costs increased much more in France (131,6 at 1.1.85) and Denmark (129,8 at 1.1.85) than in the other Member States.

Depreciation in NC
In 1984, the depreciation costs increased very much for France and Denmark, and less for the Netherlands and the United Kingdom, but still substantial. Compared with 1.1.82, Denmark, France and Belgium have the biggest increase in depreciation costs.

Taxes in NC
In 1984, taxes only increased significantly in the United Kingdom and in Belgium/Luxembourg. In all other Member states, taxes have not changed or have increased very slightly.

Interest in NC
In 1984, interest costs only increased in France and Denmark. Compared with the situation at 1.1.82, France and Denmark are the only Member States where interests costs did not decrease (+ 5,8).

Fuel in NC
In 1984, due to the change of value of the dollar, fuel cost increased in Germany, France, United Kingdom and Denmark. Compared with 1.1.82, fuel prices in national currency increased very much in France (+30,6), but very slightly in Germany (+0,2%).

Total Cost in NC
In 1984, total cost increased significantly in France, United Kingdom and Denmark. Compared with 1.1.82, total costs increased very much in France (+32,3), more than 10% more than the other Member States.

Total cost in ECU
In 1984, total cost in ECU increased more in Denmark, Belgium/Luxembourg and France then in the other Member States. Compared with 1.1.82 (100), Denmark and France have also the biggest increase in total cost, but Germany has also a substantial increase.

Fig. 2.5 DEPRECIATION IN NATIONAL CURRENCY

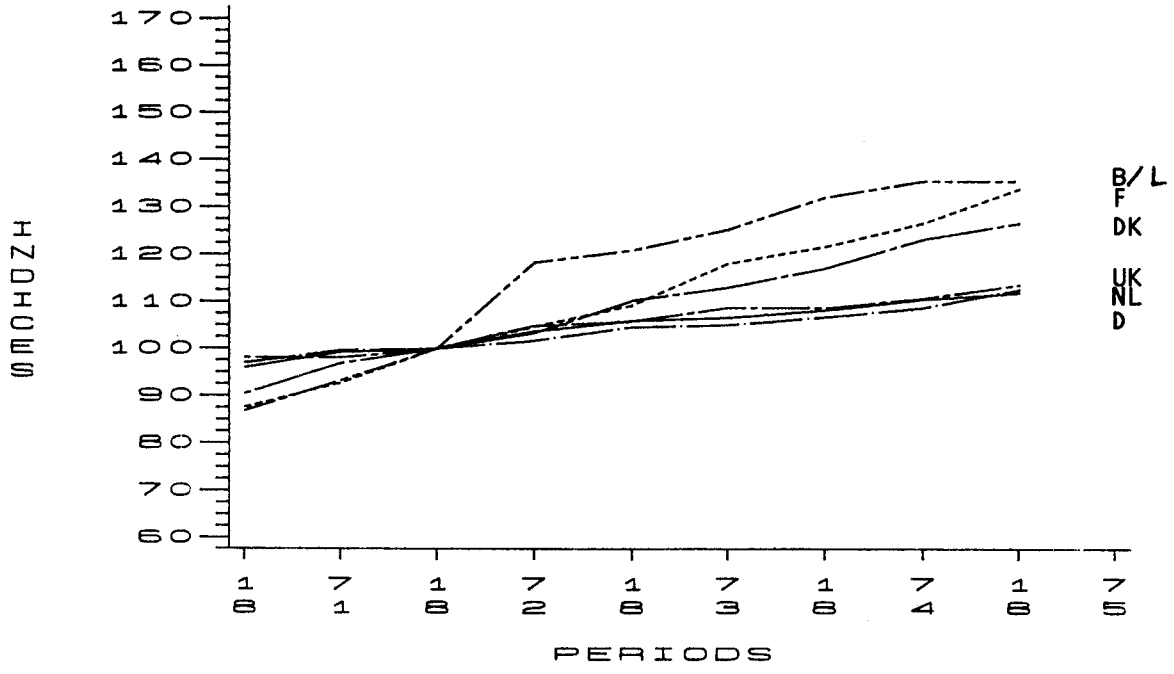


Fig. 2.6 REPAIRS AND RENEWALS IN NATIONAL CURRENCY

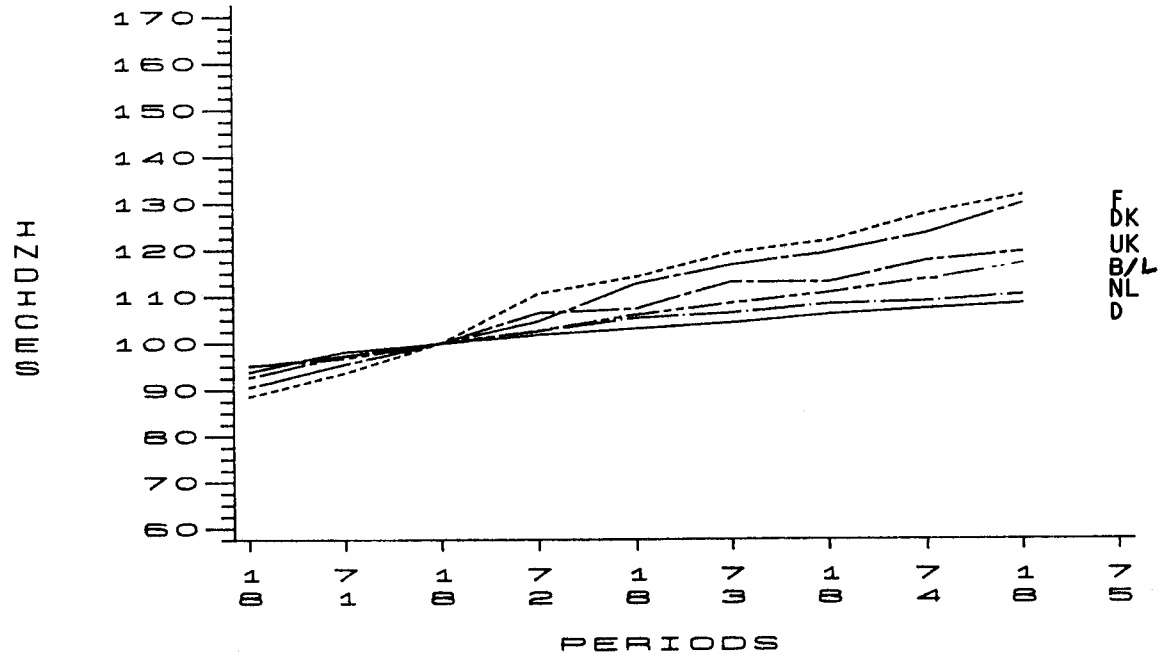


Fig. 2.7 INTEREST IN NATIONAL CURRENCY

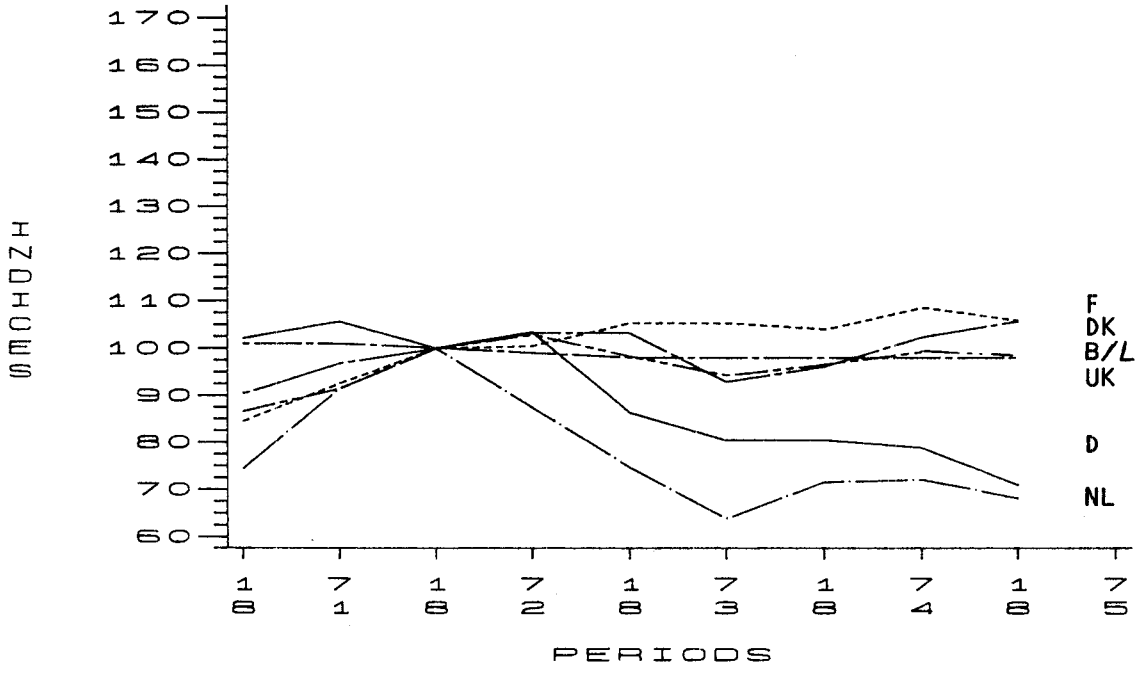


Fig. 2.8 TAXES AND CONTRIBUTIONS IN NATIONAL CURRENCY

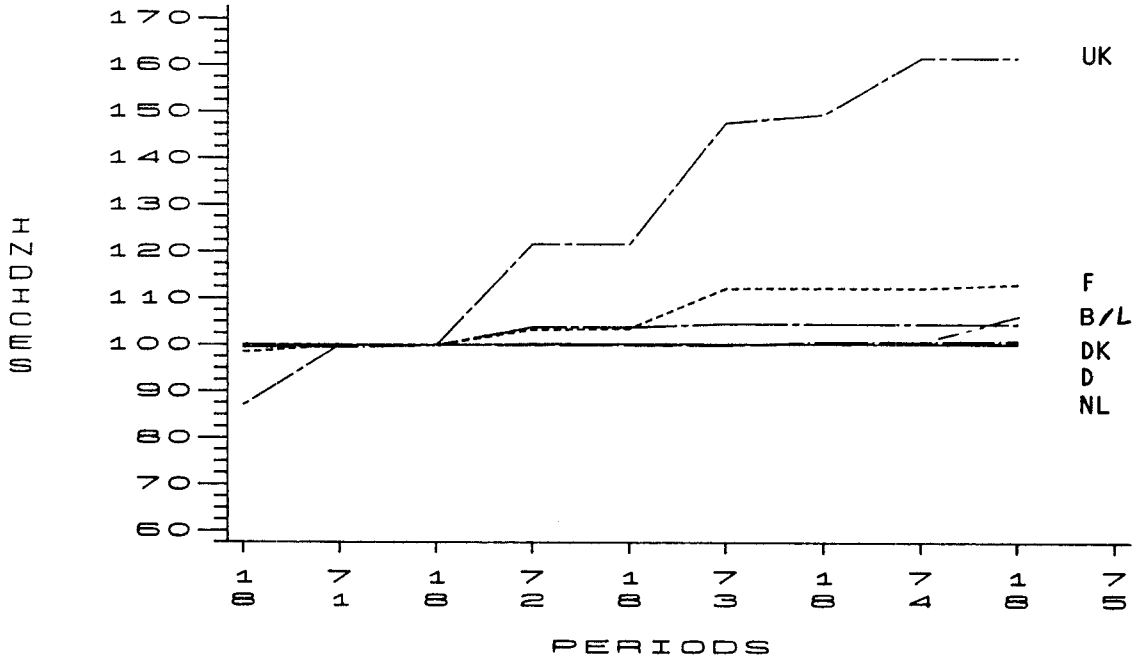


Fig. 2.9 WAGES IN ECU

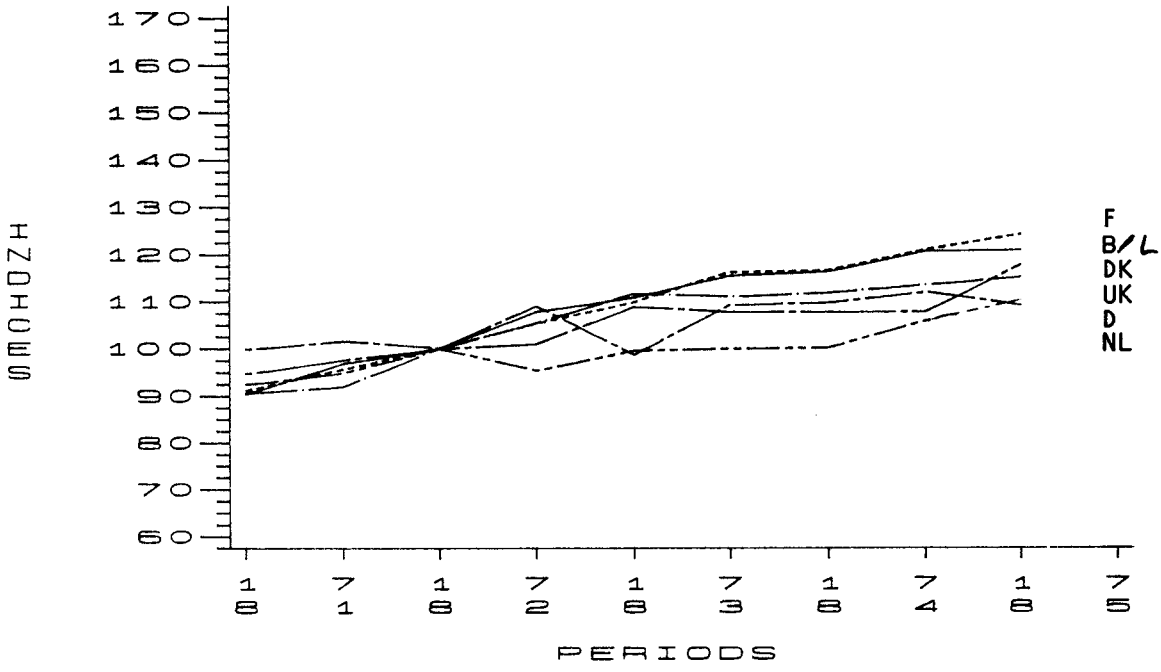


Fig. 2.10 WAGES IN NATIONAL CURRENCY

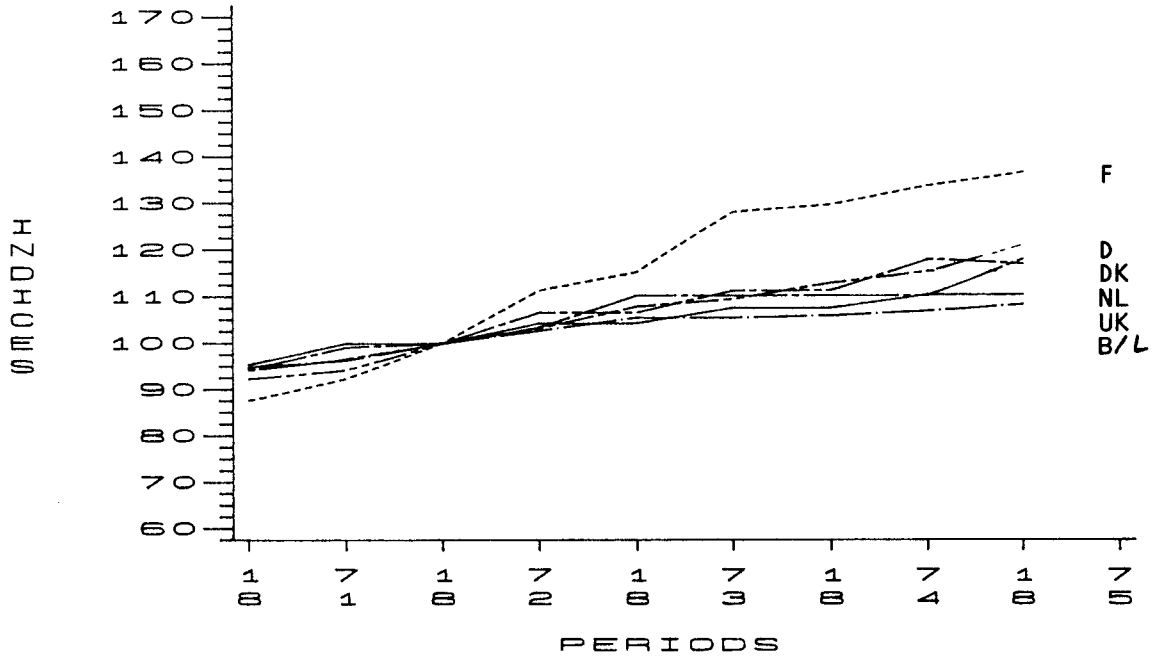


Fig. 2.11 TOTAL COSTS IN ECU

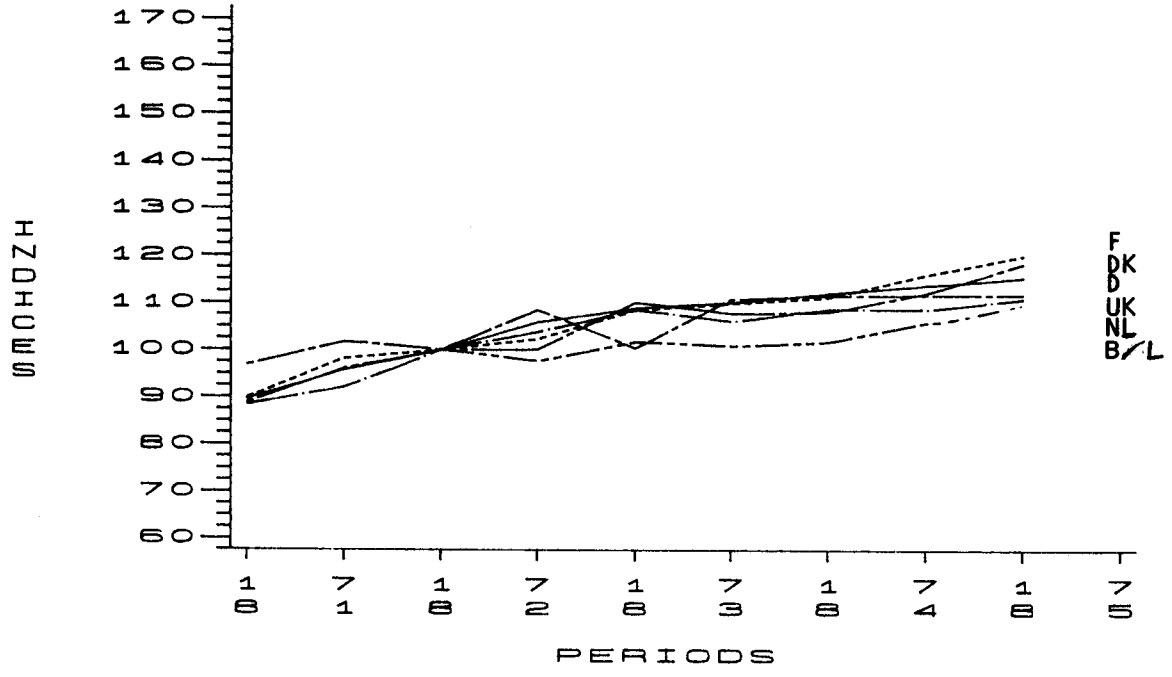


Fig. 2.12 FUEL COSTS IN ECU

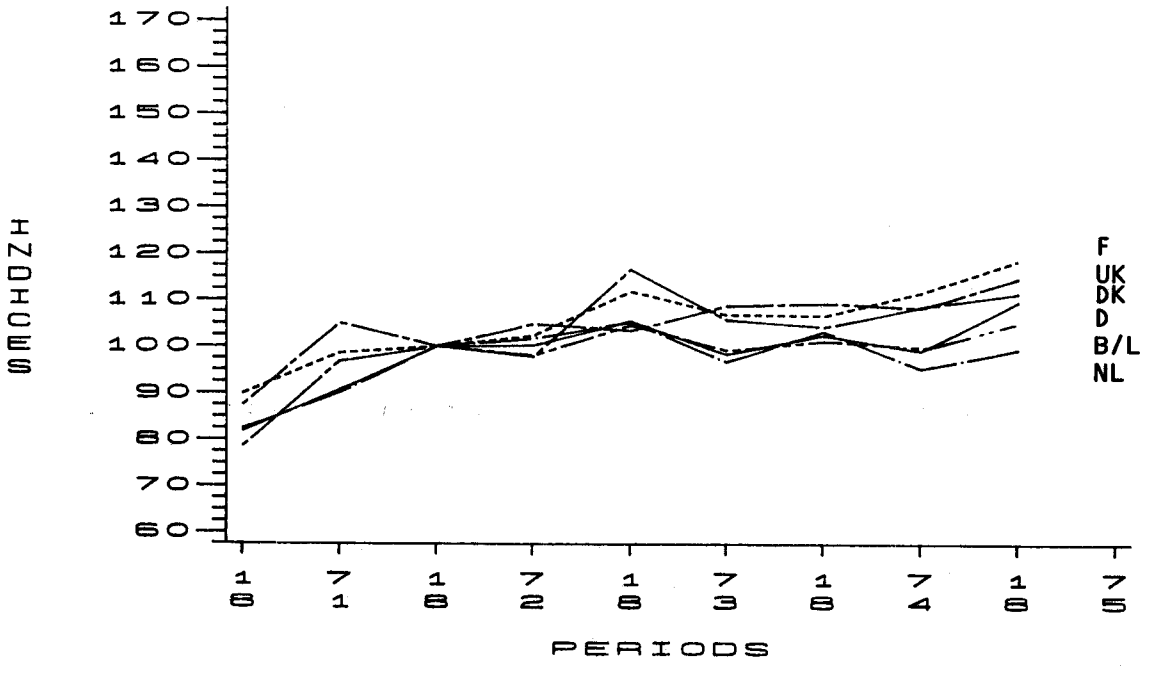


Fig. 2.13 TOTAL COSTS IN NATIONAL CURRENCY

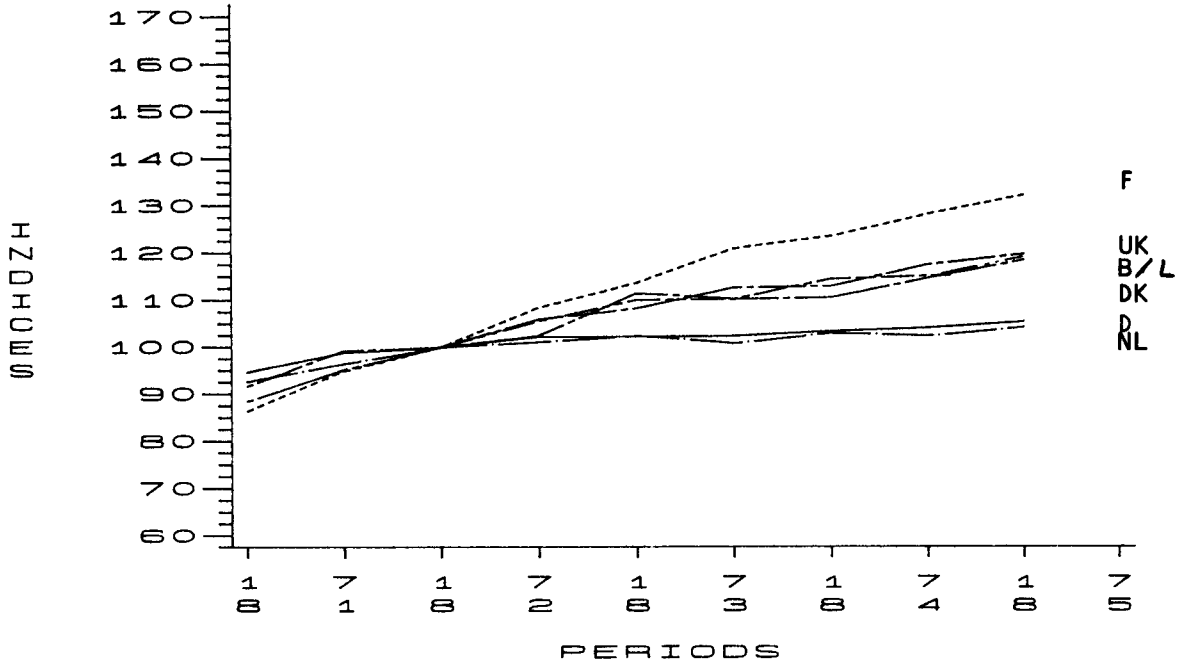
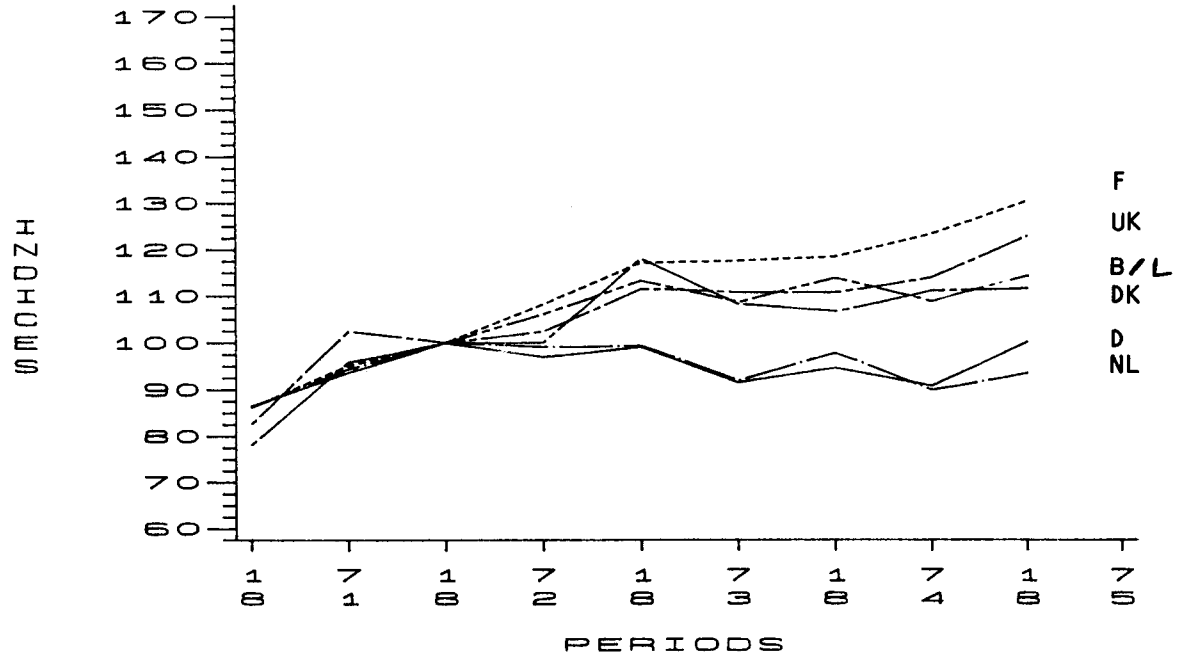


Fig. 2.14 FUEL COSTS IN NATIONAL CURRENCY



Price indices Road

2.6 The analysis of the quarterly price indices is done each quarter in the Europa Transport report. The evolution of the weighted average prices in national currency and in ECU is shown in figures 2.16 and 2.17.

2.6.1 Analysis of the annual increase of price in ECU by Member State in 1984

Table 2.17

Price indice 1984 / Price indice 1983	by relation	by direction		Average for haulier from Member State	
		outward	backhaul		
DDF (1)	+ 3.7%	+ 2.2%	+ 4.8%	+ 3.3%	D
DDI	+ 3.1%	+ 3.5%	+ 2.9%		
DDNL	+ 2.8%	+ 2.9%	+ 2.7%		
DDBL	+ 2.6%	+ 4.3%	+ 1.2%		
FFD	+ 6.5%	+ 7.3%	+ 5.4%	+ 3.9%	F
FFI	+ 4.1%	+ 3.8%	+ 4.3%		
FFNL	+ 1.2%	+ 2.6%	+ 0.4%		
FFBL	+ 2.1%	+ 3.0%	+ 1.6%		
IID	+ 11.2%	+ 9.5%	+ 12.0%	+ 8.8%	I
IIF	+ 5.5%	+ 3.4%	+ 7.8%		
IINL	+ 7.2%	+ 18.6%	+ 1.6%		
IIBL	+ 10.1%	+ 14.8%	+ 6.9%		
NLNLD	+ 1.2%	+ 0.9%	+ 1.5%	+ 1.0%	NL
NLNLF	+ 1.4%	+ 1.5%	+ 1.4%		
NLNLI	+ 1.4%	+ 2.2%	+ 0.4%		
NLNLBL	+ 0.3%	+ 1.1%	- 1.9%		
BLBLD	+ 5.2%	+ 4.8%	+ 5.5%	+ 3.8*	BL
BLBLF	- 6.9%	- 5.9%	- 11.2%		
BLBLI	- 0.2%	+ 0.3%	- 0.4%		
BLBLNL	+ 2.7%	+ 0.4%	+ 7.4%		
GRGRD	- 2.8%	- 7.0%	+ 2.7%	- 2.9%	GR
GRGRF	+ 4.3%	+ 2.2%	+ 6.9%		
GRGRI	- 1.7%	0,0%	- 3.3%		
GRGRNL	- 13.8%	- 16.3%	- 12.0%		
GRGRBL	+ 6.5%	- 1.0%	+ 11.5%		

* Average for Belgium/Luxembourg hauliers only includes relations with D, I and NL.

(1) DDF means a German haulier on the relation Germany-France and France-Germany.

Fig. 2.15 WEIGHTED AVERAGE PRICES IN NATIONAL CURRENCY

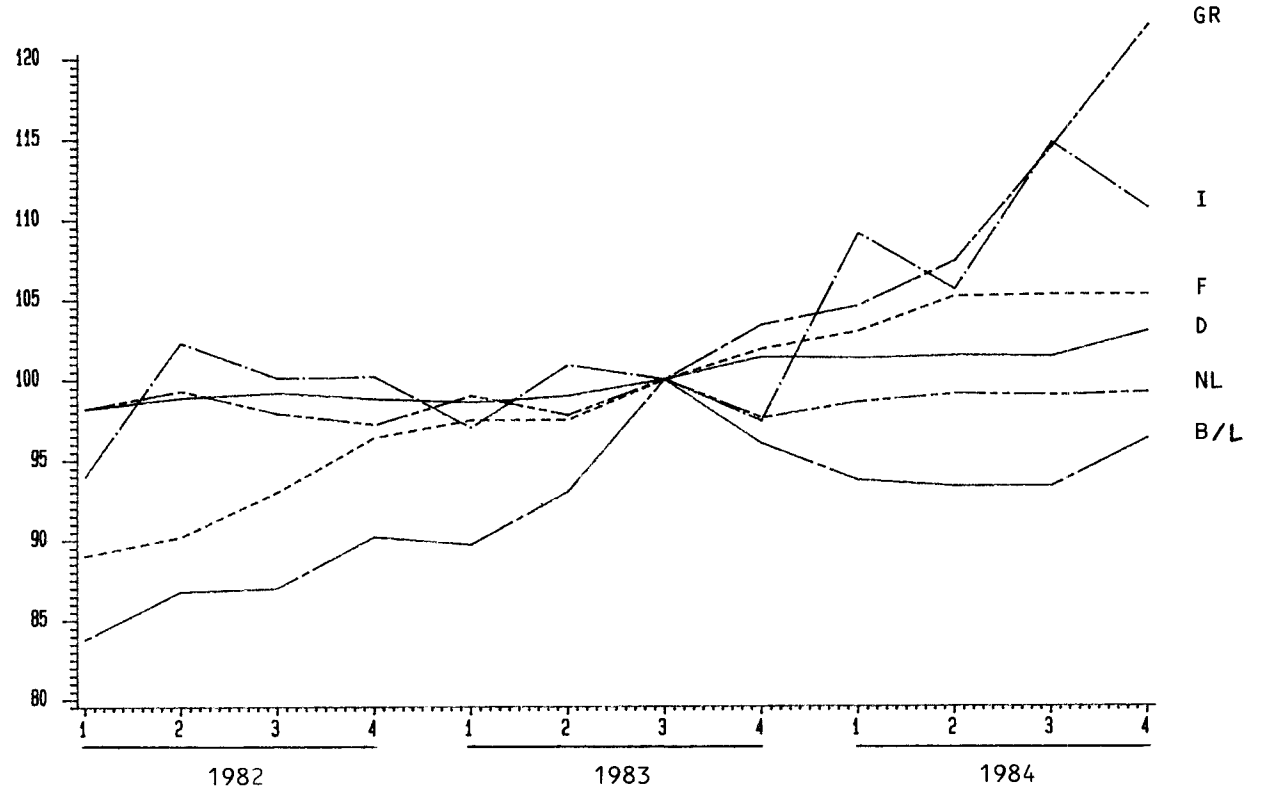
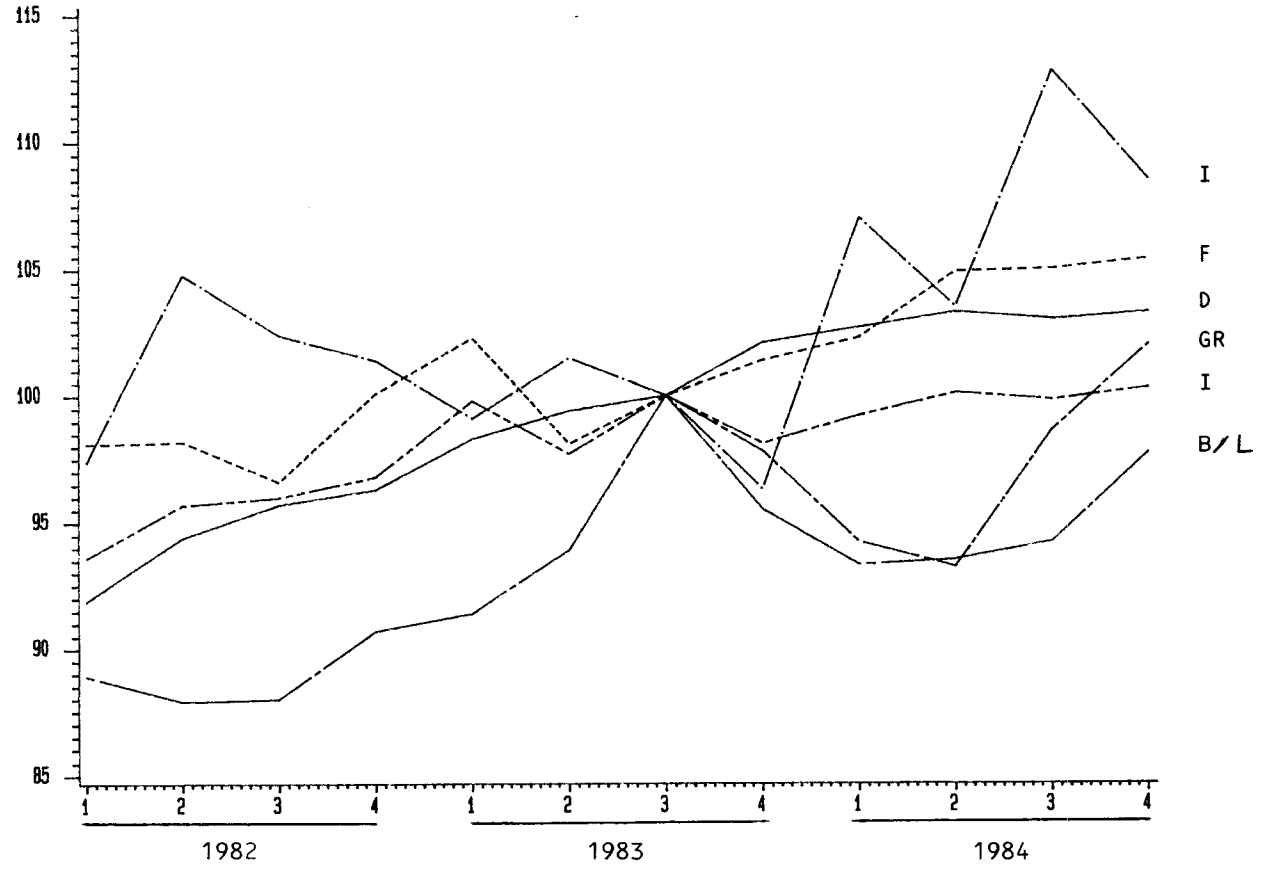


Fig. 2.16 WEIGHTED AVERAGE PRICES IN ECU



Germany

Price indices in ECU in 1984 increased slightly on all the relations and on all the directions. For some relations (DDF, DDBL) price indices decreased. The increase in prices is very stable on all the relations. The average price increased slightly, but more than the Netherlands.

France

Price indices increased significantly on the relation with Germany. Prices increased similarly in both directions on all relations, the relation with the Netherlands excepted. The average price increased at the same level as Germany and Belgium/Luxembourg.

Italy

Price indices in ECU increased significantly on all relations. On the relation with the Netherlands outward price indices increased much more than the backhaul prices.
Italy is the Member State which recorded the highest increase on any relation. The average price increased more than all other Member States.

Netherlands

Price indices in ECU increased very slightly on all the directions, backhaul of NLNLBL excepted, and all the relations. Price increases are very stable and are the lowest of all Member States. A decrease of price indice is only noticed on the backhaul of the relation with Belgium/Luxembourg. Average prices increased less than all other Member States.

Belgium/Luxembourg

The price indices for the relations BLBLF does not seem very realistic. In relation with Germany, prices increased significantly, and more than on the other relations. Ignoring the relation with France, the average prices increased at the same level than France and Germany.

Greece

Prices increased in very different ways on each relation and in each direction. The biggest decrease of all directions and all relations was noticed in the relation with the Netherlands.
Greece is the only Member State where the average price in ECU decreased; however in national currency there was a considerable increase.

2.6.2 Evolution in 1984 of cost and price indices in ECU in D, F, NL and B/L

The table below gives, by Member State, the comparison of the average levels for 1984 with 1983, and for 1983 with 1982 of both cost and price indices in ECU.

Table 2.18

	D		F		NL		B/L	
	84/83	83/82	84/83	83/82	84/83	83/82	84/83	83/82
price	+ 3.3%	+ 5.6%	+ 3.9%	+ 2.2%	+ 1.0%	+ 3.4%	+ 3.8%	+ 2.7%
cost	+ 3.2%	+ 4.9%	+ 5.4%	+ 6.4%	+ 1.7%	+ 3.3%	+ 4.2%	+ 2.7%
difference	+ 0.1%	+ 0.7%	- 1.5%	- 4.2%	- 0.7%	+ 0.1%	- 0.4%	+ 0.0%

France is the only Member State where costs increased more than prices during two consecutive years.

In each Member State, the increase in price and in costs is very close, and only in France the difference between cost and price is higher than 1 percent.

2.6.3 Comparison between the level of the backhaul price and the tonnages transported.

Table 2.19

Relation	Haul.	Price backh. / Price outw. 1983	Tonnages by haulier from origin country (M°.TONNES) in 1983 outward	backhaul	backhaul / outward	Share of total market
DF	D	88.3	4851	6708	1,38	56,9%
	F	96.0	4188	4576	1,09	43,1%
DI	D	95.7	2546	2952	1,16	48,4%
	I	88.8	3689	2172	0,59	51,6%
DNL	D	98.1	4855	3922	0,81	27,7%
	NL	86.9	11817	11063	0,94	72,3%
DBL	D	97.4	4188	4371	1,04	49,6%
	BL	93.7	4971	3732	0,75	50,4%
FI	F	93.4	2860	2420	0,85	51,2%
	I	89.5	2735	2294	0,84	48,8%
FNL	F	106.7	757	1198	1,58	32,0%
	NL	71.5	2525	1636	0,65	68,0%
FBL	F	97.3	3958	4976	1,26	39,0%
	BL	107.6	8333	5653	0,68	61,0%
INL	I	115.2	436	550	1,26	42,2%
	NL	82.1	786	565	0,72	57,8%
IBL	I	98.7	563	413	0,73	44,5%
	BL	88.6	656	561	0,86	55,5%
NLBL	NL	93.5	7074	8011	1,13	68,9%
	BL	95.6	4611	2199	0,48	31,1%
GRD	GR	153.6	314	274	0,87	
GRF	GR	139.5	45	36	0,8	
GRI	GR	181.8	85	94	1,11	
GRNL	GR	154.8	56	89	1,59	
GRBL	GR	156.4	20	37	1,85	

The backhaul price is higher than the outward price only for FNL, BLF, INL and all Greek relations. It can be seen that in most of these relations the tonnages transported are higher in the backhaul direction than in the outward direction.

2.6.4 Comparison of the evolution of the level of the backhaul price in ECU with the outward price

Table 2.20

Relation	Haul.	1982	1983	1984
DF	D	86.7	88.3	90,6
	F	94.6	96.0	94.1
DI	D	94.9	95.7	95,1
	I	88.4	88.8	90.8
DNL	D	98.6	98.1	97,9
	NL	87.1	86.9	87.5
DBL	D	98.2	97.4	97,4
	BL	91.6	93.7	94.3
FI	F	94.4	93.4	93.8
	I	85.7	89.5	93.3
FNL	F	107.7	106.7	104.5
	NL	72.3	71.5	71.3
FBL	F	94.1	97.3	96.0
	BL	93.4	107.6	99.5
INL	I	100.6	115.2	100.0
	NL	81.5	82.1	80.8
IBL	I	84.2	98.7	92.0
	BL	88.0	88.6	86.5
NLBL	NL	99.2	93.5	90.7
	BL	86.9	95.6	102.2
GRD	GR	-	153.6	169.7
GRF	GR	-	139.5	145.8
GRI	GR	-	181.8	175.9
GRNL	GR	-	134.8	162.8
GRBL	GR	-	156.4	175.8

The evolution from 1982 to 1984 of the backhaul price compared with the outward price shows a nearly identical number of "directions" where the gap between outward price and backhaul price increased or decreased (13 decreased, 12 increased).

For only two relations (DI and FBL), the gap between the outward price and the backhaul price decreased compared with 1982 for both direction. No relation has seen the gap increasing in both direction.

It seems that the difference in ECU of the real price between the backhaul and the outward is decreasing, compared with 1982.

CHAPTER 3

Inland waterways

3.1. Introduction

3.1.1. The data and the summary of the contents

Data reproduced in this issue are statistical data from the national statistical offices of Belgium, the Federal Republic of Germany and the Netherlands. For France, figures were produced by the Office National de la Navigation. Figures on Rhine traffic, including prices, were provided by the Central Rhine Commission. Data on cost and price developments are submitted by the Economic Bureau for Road and Waterway transport (E.B.W. - Ryswyk - NL) and by the Institut pour le Transport par Batellerie (I.T.B.- Brussels).

The data published on bilateral traffic are based on information provided by the exporting country.

The analysis contains a comparison between 1984 and 1983 and between 1984 and 1979. This is done in order to provide an insight in the developments since the start of the present crisis in the inland waterway sector.

The tables and graphs give rather detailed information. The analysis concentrates on the most relevant items only.

The contents of chapter 3 can be summarized as follows:

§ 3.1. : overall developments of the traffic
§ 3.2 : developments on a country by country basis
§ 3.3 : developments by commodities
§ 3.4 : developments by transport market (Rhine and North/South)
§ 3.5 : fleet developments and (over)capacity
§ 3.6 : flag shares
§ 3.7 : transport inquiry survey
§ 3.8 : developments in costs and prices.

3.1.2 Overall developments

After three years ('80-'82) of increasing decline in transport activity, 1983 was a year of stabilisation and 1984 the first year of recovery: + 3.0% in tonnes and + 4.1% in tkm. All the Member States contributed to this positive result with the exception of France, see table 3.1 and 3.2.

Table 3.1. National and international transport activity by country ('000 tonnes)

	B/L *	D *	F *	NL *	Total **	Growth rate
1979	91,191	221,170	85,536	236,825	438,799	
1980	90,943	212,900	84,864	237,599	433,899	-1.1%
1981	87,705	202,770	76,894	222,606	406,442	-6.3%
1982	85,837	196,831	69,249	204,548	379,518	-6.6%
1983	88,148	199,568	64,941	210,062	380,177	+0.2%
1984	91,140	208,709	61,857	221,725	391,444	+3.0%
1979-1984 difference	-0,051	-12,461	-23,679	-15,100	-47,355	
growth rate.	-0.06%	-5.6%	-27.7%	-6.4%	-10.8%	
1983-1984 difference	+2,992	+9,141	-3,084	+11,663	+11,267	
growth rate.	+3.4%	+4.6%	-4.7%	+5.6%	+3.0%	

* EUR 5 : import + export + national.
** EUR 5 : total national transport + total export (see also table 3.4.).

As will be shown in the course of the analysis it was particularly the steel and coal sector that contributed to this growth. The other dry cargo transports stayed more or less on the level of 1983.

The growth in the transport of oil products in 1983 (+ 3.6%) was followed by a decrease (- 5.8%) in 1984. However, the transport of chemical products showed an important growth, with the result that the volume of total liquid cargo stayed about constant.

Due to the limited recovery in 1984, the total loss of transport since 1979 in the inland waterway sector was reduced to - 10.8%. Belgium did very well and is now back on the level of '79. Transport activity in Germany and the Netherlands is some 6% below that level, while in France the situation further deteriorated: more than a quarter of total transport activity has been lost during the last six years.

Developments in tonne/kilometers show a slightly different picture, see table 3.2. In tkm the total EUR-5 transport activity in '84 was only 2.5% below the '79 level.

Table 3.2. National and international activity (*) by country ('000,000 tkm)

	B/L	D	F	NL	Total	Growth rate
1979	5,908	50,987	11,898	33,472	102,265	
1980	5,853	51,435	12,151	33,478	102,917	+0.6%
1981	5,442	50,010	11,068	31,792	98,312	-4.5%
1982	4,958	49,401	10,226	31,363	95,948	-2.4%
1983	4,934	49,100	9,447	32,281	95,762	-0.2%
1984	5,201	51,996	8,880	33,593	99,670	+4.1%
1979-1984 difference	-707	+1,009	-3,018	+121	-2,595	
growth rate	-12.0%	+2.0%	-25.4%	+0.4%	-2.5%	
1983-1984 difference	+267	+2,896	-567	+1,312	+3,908	
growth rate	+5.4%	+5.9%	-6.0%	+4.1%	+4.1%	

(*) activity = import + export + national + transit; distances as far as convered within the mentioned Member State.

N.B.: As the national statistics used in table 3.2 take into account only the distances as far as covered in the Member State, one must be careful with the interpretation by country. For instance, a major port like Antwerp is very close to the Dutch border therefore an increase of exports from Antwerp to NL + D will contribute very little to the Belgium transport statistics but much more to the Dutch. So the results in tkm are only useful for the analysis of overall (EUR-5) developments.

3.1.3 Development by market

By market, national transport and international transport, which is split up in international Rhine traffic and North/South traffic, the developments can be summarized as in table 3.3.

Table 3.3. National and international transport by market ('000 tonnes)

	National	International	
		Rhine * (Emmerich/ Lobith)	North/ South
part of total i.w. transport	52%	36%	12%
1984-1983 tonnes gained or lost growth rate	+1,824 +0.9%	+10,687 +8.5%	-912 -1.9%
1984-1979 tonnes lost growth rate	-43,410 -17.9%	+3,665 +2.7%	-4,259 -8.3%

(*) which includes transport to and from Switzerland and excludes transport between France and Germany.

This table shows clearly that the loss of transport since '79 is concentrated in the national markets (- 17.9%). The lower activity in the building industry is to a large extent responsible for this fall in national traffic. In '84 the downward trend in national transport came to a stop (+ 0.9%).

Rhine traffic monitored at the Dutch German border increased considerably in '84 (+ 8.5%) and surpassed the level of '79. It must be noted that the so called "traditional Rhine traffic" as recorded by the CCR on an observation of total Rhine activity between Antwerp and Basel, increased less sharply (+ 5.8%, see table 3.11). The upswing in the German steel industry was responsible for the positive development of Rhine traffic at the NL-D border.

In North/South traffic the main commodities are: sand and gravel, oil products and agricultural products. In these sectors of the economy the trend is still slightly down or stable, which resulted in a decrease of total traffic by 1.9%.

General conclusion

As the growth of traffic in '84 was mainly restricted to the steel and coal sector, only a limited part of the transport companies - in particular the companies that operate big push-tow units - could benefit from this positive development. A broad recovery of the market can only emerge when other sectors of the economy with major importance for inland waterway transport, such as: the building industry, agriculture and energy, will improve.

3.2 Inland waterway transport on a country-by-country basis

Table 3.4 presents: tonnage figures for 1983 and 1984, the tonnage gained or lost and growth rates for each bilateral relation and for national traffic.

Table 3.4. Inland waterways: tonnes carried, national and international traffic ('000 tonnes)

FROM \ TO		B/L	D	F	NL	Total out-going	Total outg. & nation.
B/L	1983	20,071	10,968	4,085	13,362	28,415	48,486
	1984	22,013	11,238	3,735	14,157	29,130	51,143
	difference	+1,942	+270	-350	+795	+715	+2,657
	growth rate	+9.7%	+2.5%	-8.6%	+5.9%	+2.5%	+5.5%
D	1983	10,547	70,900	2,648	28,600	41,795	112,695
	1984	11,726	70,234	3,100	29,595	44,421	114,655
	difference	+1,179	-666	+452	+995	+2,626	+1,960
	growth rate	+11.2%	-0.9%	+17.1%	+3.5%	+6.3%	+1.7%
F	1983	3,283	10,910	36,701	3,670	17,863	54,564
	1984	3,478	10,432	33,763	3,859	17,769	51,532
	difference	+195	-478	-2,938	+189	-94	-3,032
	growth rate	+5.9%	-4.4%	-8.0%	+5.1%	-6.0%	-5.6%
NL	1983	25,832	64,995	3,642	69,961	94,469	164,430
	1984	24,793	72,384	3,490	73,447	100,667	174,114
	difference	-1,039	+7,389	-152	+3,486	+6,198	+9,684
	growth rate	-4.0%	+11.4%	-4.2%	+5.0%	+6.6%	+5.9%
Total ingoing	1983	39,662	86,873	10,375	45,632	182,542	
	1984	39,997	94,054	10,325	47,611	191,987	
	difference	+335	+7,181	-50	+1,979	+9,445	
	growth rate	+0.8%	+8.3%	-0.5%	+4.3%	+5.2%	
Total ingoing & national	1983	59,733	157,773	47,078	115,593		380,177
	1984	62,010	164,288	44,088	121,058		391,444
	difference	+2,277	+6,516	-2,990	+5,465		+11,269
	growth rate	+3.8%	+4.1%	-6.4%	+4.7%		+3.0%

In national inland waterway transport the large markets are the German and the Dutch: both 70 mio tonnes per annum. The German market was about stable (- 0.9%) and the Dutch went up (+ 5.0%). The small Belgian market did extremely well (+ 9.7%). In France the situation is getting dramatic after a loss of tonnage on national transports in the years 1981, '82 and '83 of 9.7%, 11.8% and 9.6% respectively, reinforced by a loss in '84 of 8.0%.

Ingoing and outgoing traffic of the 5 Member States showed in 1984 a positive development, with the exception of France. In international traffic 9.4 mio tonnes more were carried in 1984 than in 1983 (+ 5.2%). The main contributor to this positive result was the export from NL to D: + 7.4 mio tonnes.

3.3 Inland waterway transport by commodities

3.3.1 Major commodities

The four commodities most relevant to inland water-transport are:

- building materials (NST 6)
- ores and metal waste (NST 4)
- petroleum products (NST 3)
- and coal (NST 2)

) These four NST groups cover 3/4 of total inland waterway transport.

A fifth sector of the economy with major importance for this mode of transport is the agricultural sector: NST 0+1. At the end of this paragraph some attention will be paid to these NST groups.

Table 3.5. Inland Waterways : tonnes of NST 6, 4, 3 and 2 carried in international and national traffic ('000 tonnes)

	NST				
	6 (sand, gravel)	4 (ore)	3 (oil)	2 (coal)	Total
1979	176,105	45,928	81,836	32,379	336,248
1980	174,097	43,105	76,923	37,064	331,189
1981	157,651	40,308	69,960	37,905	305,824
1982	139,358	39,809	68,735	38,307	286,209
1983	137,484	37,834	71,205	34,940	281,463
1984	139,597	44,227	67,062	38,179	289,065
1979-1984 difference	-36,508	-1,701	-14,774	+5,800	-47,183
growth rate	-20.7%	- 3.7%	-18.1%	+17.9%	-14%
1983-1984 difference	+ 2,113	+6,393	-4,143	+3,239	+7,602
growth rate	+ 1.5%	+16.9%	- 5.8%	+ 9.3%	+ 2.7%

Table 3.6. Share of NST 6, 4, 3 and 2 in total national and international inland waterway transport

	NST				
	6 (sand, (gravel)	4 (ore)	3 (oil)	2 (coal)	Total
1979	40.1%	10.5%	18.7%	7.4%	76.6%
1980	40.1%	9.9%	17.7%	8.5%	76.3%
1981	38.8%	9.9%	17.2%	9.3%	75.2%
1982	36.7%	10.5%	18.1%	10.1%	75.4%
1983	36.2%	10.0%	18.7%	9.2%	74.0%
1984	35.7%	11.3%	17.1%	9.6%	73.8%

Despite the declining activity in the building industry, the group building materials (most of it being sand and gravel) is still by far the most important (35.7%) followed by oil products (17.1%).

The share of the four NST-groups in total national and international inland waterway transport decreased gradually from 76.6% in 1979 to 73.8% in 1984. A more detailed analysis of the four main NST-groups on a country by country basis is given below.

3.3.2 NST 6: Building materials

As was shown in table 3.5 total transport of building materials went up by 1.5% in 1984. This was the first year of recovery after the down going trend since 1979. Transports are still 20.7% below the level of 1979. Given the budgetary problems of the Member States, which forced them to limit their expenditure on public works and in general the uncertain economic outlook, there is little reason to expect that these transports will go up again to the high level of 1979.

Table 3.7. Inland waterways: tonnes of NST 6 (Sand, gravel, etc.) carried in national traffic and on bilateral relations ('000 tonnes).

FROM \ TO		B/L	D	F	NL	Total outgoing
B/L	1983	3,863	877	918	6,539	8,344
	1984	4,479	1,123	753	7,057	8,933
	difference	+616	+246	-165	+518	+589
	growth rate	+15.9%	+28.1%	-18.0%	+7.9%	+7.1%
D	1983	1,753	27,689	304	16,919	18,976
	1984	1,809	27,316	418	17,002	19,229
	difference	+56	-373	+114	+83	+253
	growth rate	+3.2%	-1.3%	+37.5%	+0.5%	+1.3%
F	1983	192	7,548	17,263	1,253	8,993
	1984	561	7,438	16,022	1,321	9,320
	difference	+369	-110	-1,241	-68	+327
	growth rate	+192%	-1.5%	-7.2%	-5.4%	+3.6%
NL	1983	9,728	2,191	188	40,501	12,107
	1984	8,606	2,299	202	43,191	11,107
	difference	-1,122	+108	+14	+2,690	-1,000
	growth rate	-11.5%	+4.9%	+7.4%	+6.6%	-8.3%
Total ingoing	1983	11,673	10,364	1,420	24,711	48,168
	1984	10,976	10,860	1,373	25,380	48,589
	difference	-697	+496	-47	+669	+421
	growth rate	-6.0%	+4.8%	-3.3%	+2.7%	+0.9%

The main contribution to the rather positive result of 1984 was realised by the growth of national transports in the Netherlands: + 2.7 mio tonnes (+ 6.6%). The smaller domestic

Belgian market did also very well: + 0.7% mio tonnes (+ 15.9%). The main loss of transport was recorded in France: - 1.2 mio tonnes (- 7.2%).

Total international transport of building materials stayed about constant: + 0.9%.

3.3.3 NST 4: Ores and metal waste

After four years of continuing decrease, the transport of NST 4 swung up in 1984 by 16.9%, which brought the level of activity fairly close to the level of 1979.

Table 3.8. Inland waterways: tonnes of NST 4 (ores, etc.) carried in national traffic and on bilateral relations ('000 tonnes).

FROM \ TO		B/L	D	F	NL	Total outgoing
B/L	1983	1,578	453	657	278	1,388
	1984	1,671	704	760	193	1,657
	difference	+93	+251	+103	-85	+269
	growth rate	+5.9%	+55.4%	+15.7%	-30.6%	+19.4%
D	1983	223	2,198	404	493	1,120
	1984	289	2,403	424	350	1,063
	difference	+66	+205	+18	-143	+232
	growth rate	+29.6%	+9.3%	+4.5%	-29.0%	+20.7%
F	1983	11	2	101	0	13
	1984	19	11	125	2	32
	difference	+8	+9	+24	+2	+19
	growth rate	+73%	+450%	+23.8%		+14.6%
NL	1983	1,423	28,230	872	911	30,525
	1984	2,003	33,714	1,030	529	36,747
	difference	+580	+5,484	+158	-382	+6,222
	growth rate	+40.8%	+19.4%	+18.1%	-41.9%	+20.4%
Total ingoing	1983	1,657	28,685	1,933	711	33,046
	1984	2,311	34,429	2,214	545	39,499
	difference	+654	+5,744	+281	-166	+6,453
	growth rate	+39.5%	+20.0%	+14.5%	-23.3%	+19.5%

Table 3.8 shows that there is only one traffic relation of real importance: NL- D., which covers 76% of total NST 4 transports. The growth of this relation by 5.5 mio tonnes (= 19.4%) is to a large extend responsible for the positive result. However, most of the other (small) relations also noted a strong growth.

3.3.4 NST 3: Petroleum products

Contrary to the other main commodities transport of oil products showed a significant growth (73.6%) during the previous year 1983 (see table 3.5), which resulted from a strong increase in international (+ 19%) and a decrease (- 7.3%) in national traffic, followed by a decrease in 1984.

Table 3.9 shows that the growth of international oil transport in 1983 was only incidental. In 1984 international transport of oil products fell by 5.1% and national transports by 6.9%, so total transport decreased by 5.8%. The stabilisation, and even decrease, of oil prices during the last years seems not to be sufficient to induce a structural growth of oil transports.

Table 3.9. Inland waterways: tonnes of NST 3 (oil prod., etc.) carried in national traffic and on bilateral relations ('000 tonnes).

FROM \ TO		B/L	D	F	NL	Total outgoing
B/L	1983	5,664	4,558	271	2,705	7,534
	1984	5,603	4,224	161	2,297	6,682
	difference	-61	-334	-110	-408	-852
	growth rate	-1.1%	-7.3%	-40.6%	-15.1%	-11.3%
D	1983	319	17,983	308	817	1,444
	1984	420	16,672	343	741	1,504
	difference	+101	-1,311	+35	-76	+60
	growth rate	+31.7%	-7.3%	+11.4%	-9.3%	+4.2%
F	1983	1	1,237	7,874	51	1,289
	1984	7	953	6,534	33	993
	difference	+6	-284	-1,340	-18	-296
	growth rate	+600%	-23.0%	-17.0%	-35.3%	-23.0%
NL	1983	7,654	14,592	442	6,729	22,688
	1984	5,538	16,207	352	6,977	22,097
	difference	-2,116	+1,615	-90	+248	-591
	growth rate	-27.6%	+11.1%	-20.4%	+3.7%	-2.6%
Total ingoing	1983	7,994	20,387	1,021	3,573	32,955
	1984	5,965	21,384	856	3,071	31,276
	difference	-2,009	+997	-165	-502	-1,679
	growth rate	-25.2%	+4.9%	-16.2%	-14.0%	-5.1%

By relation big differences appear. For instance, the two main international relations:

NL ⟶ D + 11.1% (+1.6 mio tonnes)

NL ⟶ B - 27.6% (- 2.1 mio tonnes).

It was specifically the transport on the latest relation that showed a strong growth during the previous year. In 1984 activity went back to the level of 1982.

3.3.5 NST 2: Solid mineral fuels

Total coal transports went up by 9.3% in 1984 (table 3.5). This growth arised as well in international traffic (+ 14%) as in the national markets of B, D and NL.

Table 3.10. Inland waterways: tonnes of NST 2 (coal, etc.) carried in national traffic and on bilateral relations ('000 tonnes).

FROM \ TO		B/L	D	F	NL	Total outgoing
B/L	1983	2,701	433	60	110	603
	1984	3,037	608	91	237	936
	difference	+336	+205	+31	+127	+333
	growth rate	+12.4%	+50.9%	+51.7%	+115%	+55.2%
D	1983	1,057	11,303	1,088	3,244	5,389
	1984	1,261	12,206	1,438	3,811	6,510
	difference	+204	+903	+350	+567	+1,121
	growth rate	+19.3%	+8.0%	+32.2%	+17.5%	+20.8%
F	1983	7	148	5,795	59	214
	1984	10	97	5,521	19	126
	difference	+3	-51	-274	-40	-88
	growth rate	+42.9%	-34.5%	-4.7%	-67.8%	-41.1%
NL	1983	703	3,139	616	4,477	4,458
	1984	973	3,159	453	5,258	4,585
	difference	+270	+20	-163	+781	+127
	growth rate	+38.4%	+0.6%	-26.5%	+17.4%	+2.8%
Total ingoing	1983	1,767	3,720	1,764	3,413	10,664
	1984	2,244	3,864	1,982	4,067	12,157
	difference	+477	+144	+218	+654	+1,493
	growth rate	+27.0%	+3.9%	+12.4%	+19.2%	+14.0%

The growth of coal transports in and to Germany was closely linked to the increasing activity in the steel industry. Belgian and German coal exports increased also considerably: + 55% and 21% respectively. The long continued strike during 1984 of the miners in the UK might have stimulated coal traffic on certain international relations. In the Netherlands an increase was noted in the transport of imported coal from overseas for power stations. (+ 17.4%).

3.3.6 NST 0+1: Agricultural products

Agricultural products like cereals and animal foods are important commodities for inland navigation. Some 12% of total national transports, 8% of Rhine traffic and 19% of North/South traffic is constitued by these goods. During the past years these transports were fairly stable. In tables 3.12 till 3.14 the development in 1984 is given for Rhine traffic and North/South by commodity. Rhine activity went slightly up due to an increase in downstream traffic. In North/South there was a decrease of 3.7% compared to 1983. The European policy to reduce overproduction of milk will have had its effect on the consumption of animal food.

3.4 Inland waterway transport by market

3.4.1 International Community inland waterway transport can be basically divided into two separate geographical and organizational markets: the Rhine and the North/South (i.e. traffic between the Netherlands, Belgium and France west of the Rhine.

3.4.2 Rhine

Of all international intra-Community traffic by inland waterways, about 75% goes by the Rhine. The development in tonnes and tonne/kilometres of traditional Rhine traffic (i.e. international Rhine traffic, including traffic to and from Switzerland, plus Germany and French national traffic via the Rhine) is shown below:

Table 3.11. Traditional Rhine traffic ('000 tonnes and '000.000 tkm).

	'000 tonnes	difference	growth rate	'000.000 tkm	difference	growth rate
1979	205,473			36,772		
1980	198,166	- 7,307	- 3.4%	36,326	- 446	-1.2%
1981	189,731	- 8,435	- 4.3%	35,486	- 840	-2.3%
1982	184,253	- 5,478	- 2.9%	35,143	- 343	-1.0%
1983	187,691	+ 3,438	+ 1.9%	35,095	- 48	-0.1%
1984	198,576	+10,885	+ 5.8%	37,307	+2,212	+6.3%
1979-1984		- 6,897	- 3.4%		+ 535	+1.5%

During the period 1979-1982 transport activity in tonnes decreased by 10.3% or about 21 mio tonnes. After 1979, which was the best year for inland waterway Rhine transport since 1974, which was the best year ever, the downward trend on a yearly basis amounted to 3.4%, 4.3% and 2.9% in consecutive years. In 1983 this trend reversed and a slight increase of 1.9% could be noted. In 1984 the positive trend reinforced and resulted in a growth of 5.8%. The growth was strongest on the lower part of the Rhine (Rotterdam-Duisburg) as follows from the traffic monitored at the Dutch/German border: + 8.5%, see next tables.

In tonne/kilometres the downward trend during 1979-1982 has been less strong, but still important. In 1984 the level of activity became above the level of 1979 (+ 1.5% in tkm).

The traffic registered at the German/Dutch border at Emmerich/Lobith is another indicator for the Rhine market (see tables 3.12 and 3.13).

Table 3.12. International Rhine traffic passing Emmerich/Lobith upstream ('000 t)

	1983	1984	Difference	growth
Total	83,238	89,808	+6,570	+ 7.9%
NST Chapters				
0) agro	2,318	2,196	- 122	- 5.2%
1)	7,105	6,795	- 310	- 4.4%
2 coal	4,480	4,432	- 48	- 1.1%
3 oil prod.	22,816	23,565	+ 749	+ 3.3%
4 ore	29,914	35,938	+6,024	+20.1%
5 steel products	4,209	4,137	- 72	- 1.7%
6 sand, gravel	2,895	3,105	+ 210	+ 7.3%
7 fertilizer	3,139	2,894	- 245	- 7.8%
8 chem. products	5,543	5,691	+ 148	+ 2.7%
9 machinery,etc.	819	1,055	+ 236	+28.8%

In upstream traffic, about 2/3 of all traffic passing this point, an increase of 7.9% was registered. NST 4 and 3 are by far the most important commodity groups on this link.

As indicated before, it was the rise in German imports of ore that was almost entirely responsible for the growth of the traffic on this relation. Since the transport of ore is concentrated on a limited number of big push-tow units, the rest of the Rhine fleet had little benefit of the increase in upstream traffic.

Table 3.13. International Rhine traffic passing Emmerich/Lobith downstream ('000 t)

	1983	1984	Difference	growth rate
Total	43,049	47,166	+4,117	+ 9.6%
NST Chapters				
0) agro	1,332	1,940	+ 608	+45.6%
1)	1,256	1,441	+ 185	+14.7%
2 coal	5,015	5,924	+ 909	+18.1%
3 oil prod.	1,077	1,191	+ 114	+10.6%
4 ore	671	620	- 51	- 7.6%
5 steel products	5,140	6,432	+1,292	+25.1%
6 sand, gravel	20,650	20,786	+ 136	+ 0.6%
7 fertilizer	2,116	2,118	+ 2	+ 0.1%
8 chem. products	3,410	3,967	+ 557	+16.3%
9 machinery,etc.	2,382	2,747	+ 365	+15.3%

In downstream traffic an even stronger increase of 9.6% was noted. The export of German steel products was the main contributory, but several other commodities (agricultural products, coal and chemical products) did also very well. The main commodity on this relation, sand and gravel, 40% of the traffic, was stable. The growth of NST 9 (machinery, finished products), both in upstream and downstream direction, is remarkable. A large part of this traffic is containerized and it is known from the industry that container transport on the Rhine is a fast growing business.

3.4.3. North-South

North-South consists of the network of rivers and canals west of the Rhine between the Netherlands, Belgium and France. By commodity group the market situation changed between 1983 and 1984 as follows :

Table 3.14. North-South traffic ('000 tonnes)

	1983	1984	Difference	growth rate
Total	47,798	46,886	- 912	- 1.9%
NST Chapters				
0) agro	5,411	5,258	- 153	- 2.8%
1)	3,947	3,768	- 179	- 4.5%
2 coal	944	1,246	+ 302	+24.2%
3 oil prod.	10,525	7,924	-2,601	-24.7%
4 ore	2,183	2,554	+ 371	+17.0%
5 steel products	1,918	1,917	- 1	- 0.1%
6 sand, gravel	17,297	16,517	- 780	- 4.5%
7 fertilizer	1,901	1,887	- 14	- 0.7%
8 chem. products	2,499	4,326	+1,827	+73.1%
9 machinery, etc..	1,170	1,489	+ 319	+27.3%

The downward trend in North/South traffic started after 1980 (a year later than in Rhine-traffic). In the two years thereafter a sharp loss of traffic of 19% was noted. In 1983 a recovery of 5.7%, or 2.6 mio tonnes, emerged. However, this was not the starting point of a structural upward trend in the market. The increase was caused by a sudden upswing in only one commodity: oil-transports + 2.6 mio tonnes (+ 34%) which turned out to be of an incidental nature.

In 1984 oil transports fell back to their original level: - 2.6 mio tonnes. The tankers market found partly compensation in the strong increase of transport of chemical products, + 1.8 mio tonnes (+ 73%!). The main commodities in dry cargo are: sand and gravel, and agricultural products (NST 0+1). In both sectors the trend was slightly down. However, the losses were compensated by increases in coal, ore and finished products.

3.5 Fleet developments

Despite the recovery of the inland waterway transport market in 1984, the level of demand is still below the level of 1979: - 10.8% in tonnes and - 2.5% in tkm (see tables 3.1 and 3.2). In this paragraph the development of the supply side, i.e. the fleet, is given.

3.5.1 Total fleet

Table 3.15 shows the size of the total fleet and by Member State - in number of vessels and carrying capacity - at various dates.

Table 3.15. Fleet developments: total fleet in number of vessels and carrying capacity ('000 tonnes)

		1.1. 1979	1.1. 1984	1.1. 1985	1984-1979	Growth	1984-1983	Growth rate
Total:	vessels	19,397	17,238	16,982	-2,415	-12.5%	-256	-1.5%
	carrying capacity	13,171	12,779	12,839	-332	-2.5%	+60	+0.5%
B :	vessels	3,321	2,675	2,603	-718	-21.6%	-72	-2.7%
	carrying capacity	1,955	1,759	1,756	-199	-10.2%	-3	-0.2%
L :	vessels	20	15	17	-3	-15.0%	+2	+13.3%
	carrying capacity	12	11	12	0	0.0%	0	0.0%
D :	vessels	4,230	3,411	3,222	-1,008	-23.8%	-189	-5.5%
	carrying capacity	3,859	3,422	3,295	-564	-14.6%	-127	-3.7%
F :	vessels	5,525	4,831	4,769	-756	-13.7%	-62	-1.3%
	carrying capacity	2,618	2,374	2,329	-289	-11.0%	-45	-1.9%
NL :	vessels	6,301	6,306	6,371	+70	+1.1%	+65	+1.0%
	carrying capacity	4,727	5,213	5,447	+720	+15.2%	+234	+4.5%

In 1984 the capacity of the fleet went slightly up (+ 0.5%), which brought the capacity on the level of - 2.5% compared to 1979. This figure is the result of two opposite tendencies: on the one hand the fleets of Belgium, Luxembourg, Germany and France decreased by 12.5%, on the other hand the capacity of the Dutch fleet increased by 15.2%.

Consequently, the relative shares of the national fleets in the total fleet changed considerably over the years, as is shown in table 3.16.

Table 3.16. National shares in total fleet capacity

	1.1.1979	1.1.1984	difference
B	14.8%	13.7%	-1.1%
L	0.1%	0.1%	0.0%
D	29.3%	25.7%	-3.6%
F	19.9%	18.1%	-1.8%
NL	35.9%	42.4%	+6.5%

3.5.2 Dutch and German fleets

The remarkable difference between the development of the two biggest fleets (NL and D) has been investigated in more detail, see table 3.17.

Table 3.17. Break down of fleet developments, 1979-1984, in round figures.

period 1979-1984	Netherlands capacity x '000 t	Germany capacity x '000 t
total fleet, 1.1.1979	4.700	3.900
1. scrappings	- 250 (-5%)	- 510 (-13%)
2. new buildings	+ 550 (+12%)	+ 250 (+ 6%)
balance (2-1)	+ 300	- 260
4. exports	- 360 (-8%)	- 470 (-12%)
5. imports	+ 770 (+16%)	+ 180 (+ 5%)
balance (5-4)	+ 410	- 290
Total development	+ 710	- 550

It turns out that some 55% of the growth of the Dutch fleet is caused by the surplus of the export/imports balance of second hand ships. In Germany it is the other way round: 55% of the reduction is explained by this balance. (From the data that are currently available it is not possible to indicate to what extend the imported vessels in NL are exported vessels from D). The rest of the difference in the development of the fleets is explained by differences in building and scrapping activity. These figures reflect the influence of the German scrapping scheme at one hand and the Dutch investment premiums on new buildings at the other hand.

3.5.3 Overcapacity

In the two previous issues of the Annual Report an estimate was made of the overcapacity in the inland navigation sector. The calculation was based on the assumption that 1979 was a year with a reasonable equilibrium between supply and demand.

Table 3.18. Estimated overcapacity of the total fleet

development since 1979	1.1.1984	1.1.1985
demand (t/km)	-6.4%	-2.5%
supply (t. carrying capacity)	-3.0%	-2.5%
balance	-3.4%	0.0%
prod. incr. (1%/year)	+5.0%	+6%
estimated overcapacity	8.4%	+6%

Overcapacity was reduced to some extend in 1984.

The general feeling in the industry is that there is a greater overcapacity than the 6% that is calculated here. The explanation could be that the increase of the productivity exceeds the 1% per annum that is assumed here. Especially during periods of crisis transporters tend to increase their productivity in an attempt to find some compensation for the low freight rates (see paragraph 3.8).

3.6 Inland waterway transport by flag

Not all the 1984 data on the share of the fleet of each of the Member States in inland waterway transport is as yet available. Therefore, data from 1982, based on tonnes carried, are presented here in order to give an insight in traffic on each of the inland waterway transport markets.

3.6.1 Flagshares on national and international markets

In table 3.19 flag shares are given for national transport, international transports, ingoing and outgoing traffic and total transport, including transit traffic of Belgium/Luxembourg, Germany, France and the Netherlands. Next to the traffic shares of each country the share is given for other carriers ("0"). Under this heading vessels of Swiss and East bloc nationalities are the most important.

Table 3.19. Inland waterways: national and international traffic in tonnes; share by nationality of the vessel, 1982 (%)

	nationality of the vessel	national traffic %	international traffic %	outgoing traffic %	ingoing traffic %	total traffic (incl. transit) %
B/L	B/L	90.6	31.2	31.8	30.7	45.8
	D	0.4	7.7	11.6	4.7	5.6
	F	0.4	6.5	7.0	6.1	6.4
	NL	6.2	49.1	42.3	54.2	37.6
	O	2.4	5.5	7.3	4.3	4.6
D	B/L	0.6	5.9	7.5	5.0	4.3
	D	89.1	33.8	21.3	40.5	50.7
	F	0.2	2.2	2.8	1.9	2.2
	NL	6.3	45.0	52.0	41.3	31.7
	O	3.8	13.1	16.4	11.3	11.1
F	B/L	0.1	19.3	12.7	31.3	7.8
	D	0.3	36.3	46.1	18.7	16.2
	F	99.2	21.9	16.9	30.8	61.6
	NL	0.1	13.2	12.1	15.2	6.7
	O	0.3	9.3	12.2	4.0	7.7
NL	B/L	1.4	12.2	11.7	13.2	11.2
	D	0.3	22.7	27.0	12.8	16.7
	F	0.2	3.2	2.9	4.0	2.8
	NL	97.6	54.2	50.0	63.5	63.1
	O	0.5	7.7	8.4	6.5	6.2

As becomes clear from the table, national traffic is in the hands of transporters of that same country. Flagshares tend to be about 90% and well above. Only Dutch carriers have a small share of about 6% in Belgian and German national traffic.

In international traffic, the very strong position of the Dutch fleet is the most interesting feature. Not only do Dutch vessels carry 54.2% of Dutch international traffic, they also are the main transporter in German (45%) and Belgian (49%) international traffic. This important marketshare is hold in ingoing as well as in outgoing traffic.

In German and Belgian international traffic, national carriers hold important market shares of about a third of the tonnage transported. As far as Belgium is concerned the share is about the same in ingoing as in outgoing traffic. For German flag vessels the share is twice as big in ingoing as in outgoing traffic.

On the French international inland waterway transport market German carriers hold the biggest share (36%), in particular in outgoing traffic (French/German Rhine traffic).

Figures on market shares in total international traffic, based on tonnes carried, as well as in international Rhine shipping, are presented in table 3.20. Market shares in North/South transport could be estimated on the bases of the other two figures.

Table 3.20. Flag shares in total international transport and international transport by market, 1982 (%)

Flag	Total international traffic (tonnes)	Rhine traffic (tonnes)	North/South traffic (tonnes) *
B/L	14.5%	7.2%	37%
D	24.5%	30.5%	10%
F	5.5%	2.5%	14%
NL	45.0%	50.1%	34%
O	10.5%	9.7%	5%

(*) estimated

3.7 Transport Inquiry Survey

The results of opinion surveys carried out among waterway operators on the Rhine and the North/South network give a quick insight into effects of the economic depression on the inland waterway sector.

On the Rhine, these surveys are conducted by the Central Rhine Commission in cooperation with the European Commission among 22 shipowner companies and cooperatives of private operators.

On the North/South, the Economic Bureau for road and waterway transport (E.B.W., Netherlands), and the Institut pour le Transport par Batellerie (I.T.B., Belgium) collect information among a panel of owner/operators and shipowners on behalf of the Commission. The Office National de la Navigation (O.N.N., France) also supplies important information.

3.7.1 Rhine

The long down going trend in Rhine traffic reversed in the second half of 1983. During the third and fourth quarter of that year growth figures in tonnes of 5% were reported. The speed of growth increased to 8.5% during the first quarters of 1984, but slowed down in the second half.

Table 3.21. Traditional Rhine traffic ('000 tonnes and '000,000 tkm)

	'000 tonnes 1983	'000 tonnes 1984	Change*	'000,000 tkm 1983	'000,000 tkm 1984	Change*
Quarter						
1	43,969	47,704	+8.5%	8,524	8,728	+2.4%
2	48,023	52,109	+8.5%	9,162	9,913	+8.3%
3	48,936	50,154	+2.5%	9,213	9,677	+5.0%
4	46,763	48,609	+4.0%	8,196	8,989	+9.7%
Total	187,691	198,576	+5.8%	35,095	37,307	+6.3%

* compared to the same quarter of the previous years.

In tonne/kilometres the picture is more varied. The strong growth in the latest quarter of 1984 (+ 9.7% compared to the Q4 1983) results more from the fact that long distance activity during Q4 1983 was very low, as a result of extremely low water levels on the upper Rhine, than from an increase in activity in Q4 1984.

The aggregate balance of opinions on activity and utilisation of capacity published in the quarterly reports "Market developments" show that there is little optimism among Rhine operators. The continuing low prices, the decreasing speed of growth and the fact that the growth as yet was mainly limited to the steel industry, are factors to justify this lack of optimism.

3.7.2 North/South

Waiting time is one of the best indicators of activity on the North/South market for dry bulk cargo. Transport of oil products is free from "bourse" intervention. The same applies for sand and gravel transports originating in the Netherlands.

The following table, published before in "Market developments, n. 16" shows clearly the increase of waiting time over the years in Belgium and France.

Table 3.22. Quarterly average of waiting days in international North-South traffic

Country of origin	Year	Q1	Q2	Q3	Q4	Average
B*	1981	7.0	6.0	8.0	4.5	6.4
	1982	5.2	7.5	8.5	7.5	7.2
	1983	8.2	8.8	8.5	7.5	8.3
	1984	10.5	11.0	9.5	11.5	10.6
F	1981	8.5	7.0	15.3	14.0	11.2
	1982	9.2	18.0	16.1	12.5	14.0
	1983	20.9	17.0	21.0	16.2	22.3
	1984	19.0	19.6	22.5	18.6	20.0
NL	1981	8.3	4.4	5.6	3.0	5.3
	1982	6.5	6.2	9.8	7.1	7.4
	1983	6.9	6.9	8.5	4.9	6.8
	1984	6.2	6.8	8.5	6.6	7.0

* Belgian domestic and Belgium to France

The figures for the Netherlands are flattered because a number of free market-trips without waiting time (oil, sand and gravel) were included in this registration by mistake. (This will be corrected in the next issue). From other sources it is known that waiting times on the bourses for dry bulk trips originating in the Netherlands were on average between 10 and 14 days in 1984.

The feeling of the transporters about the market situation (balance of opinions on demand and utilisation of capacity) is still very negative. The continuing low prices in the free segment of the market and the still increasing waiting times on the regulated market explain these negative feelings.

3.8. Cost and price indices

In the previous annual report some information was given on costs and prices. Since then the system has further developed. A more complete picture for international inland waterway transport by market can be given now.

All indices are on the basis 1.1.1979 = 100. This year had been chosen by the CCR as a base year for Rhine market observation, because it is considered to be the latest year with equilibrium between supply and demand.

Some of the tables and graphs that are summarized and commented here, have already been presented in the quarterly reports No. 15 and 16.

3.8.1. Methodology

Cost indices are calculated for four shiptypes :

- ships having a carrying capacity of 350 tonnes;
- ships having a carrying capacity of 600 tonnes;
- ships having a carrying capacity of 1200 tonnes;
- pusher units.

Since the information on pusher units is not yet available these calculations are based on the costs of motorvessels of 2200 tonnes.

The cost indices are calculated following a given cost structure in the base year (1.1.1982). The following cost elements are taken into account :

- wages,
- capital,
- fuel,
- other costs.

On waiting days the following assumptions were made :

Rhine : 1 day,
N/S : 10 days.

The calculations are based on the actual cost developments on 47 international traffic relations representing total international waterway transport in the Community. By weighting the various relations cost indices and cost elements, indices are found for each of the bilateral traffic relations between Member States and for the North-South and Rhine inland waterway transport markets.

The information is collected twice a year, on 1 January and 1 July.

Price indices for the Rhine are collected by the CCR in cooperation with the Arbeitsgemeinschaft. The data are provided by 22 transport organizations, that means: most of the big ship owner companies and some cooperatives of small operators. These organizations are responsible for 50 to 60% of the total tonnage moved.

Price indices for international North-South traffic are collected by EBW (Rijswijk) and ITB (Brussels). The information is obtained from both shippers and transporters. Some 200 transport firms provide information for this part of the market observation system.

3.8.2. Overall cost development and by market (in ECU)

The indices published in the previous annual report were based on the costs as they were on 1.1.1982. In order to obtain conformity with the figures and indices published by the Central Rhine Commission, this publication will from now on base its indices on costs and prices on 1.1.1979 (= 100). The choise of an uniform base year will allow comparisons between cost developments, overall and by market, and price developments by market and for dry and liquid cargo. By comparing the two, an indication is given on the development of profitability.

Figure 3.1. : Overall cost indices by element (Rhine + North-South) in ECU.

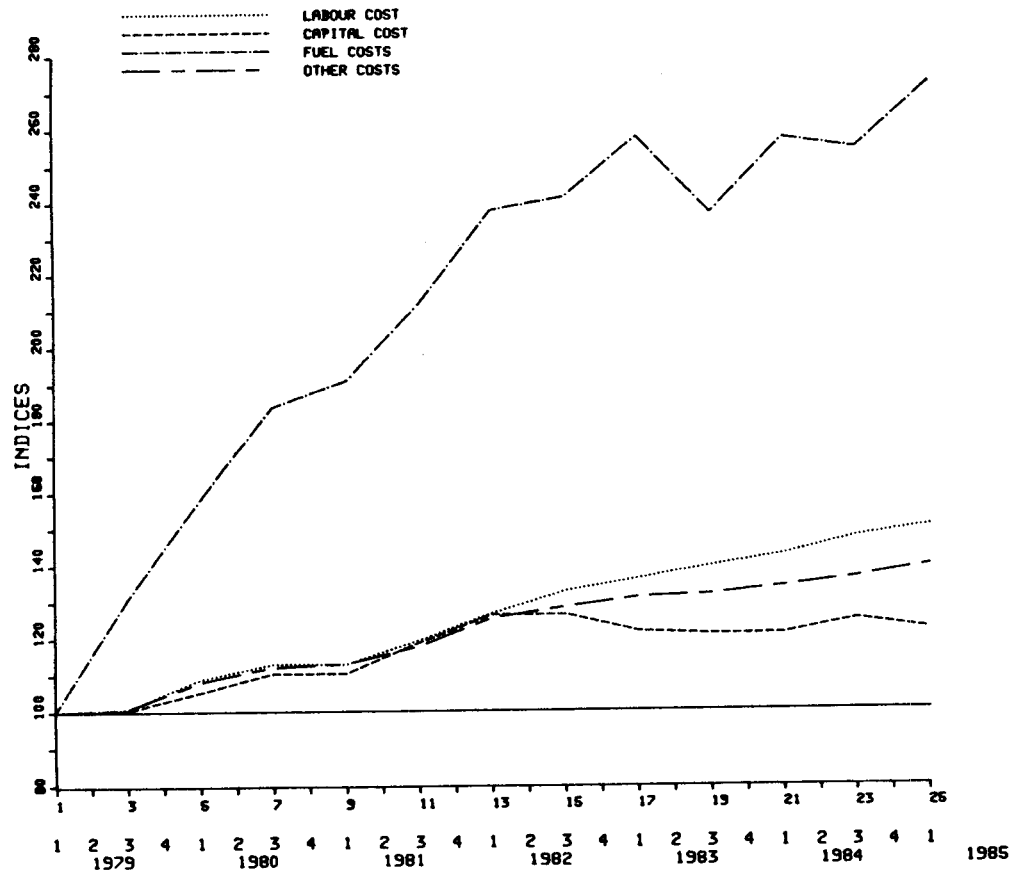


Table 3.23.: Cost indices by elements and by market 1.1.1984, 1.7.1984, 1.1.1985 in ECU (1.1.1979 = 100).

Market	Cost elements	1.1.1984	1.7.1984	1.1.1985
Overall	wages	142.3	147.2	150.3
	capital	120.9	124.8	122.0
	fuel	257.2	253.2	271.7
	other costs	133.8	136.2	139.3
	total costs	142.6	146.1	148.7
Rhine	wages	144.5	140.0	151.7
	capital	124.4	128.5	124.7
	fuel	259.1	258.4	273.7
	other costs	136.6	139.0	141.7
	total costs	146.6	149.9	152.0
North/South	wages	139.1	144.6	148.1
	capital	115.4	119.0	117.8
	fuel	264.3	247.7	268.5
	other costs	129.4	132.0	135.4
	total costs	136.5	140.3	143.5

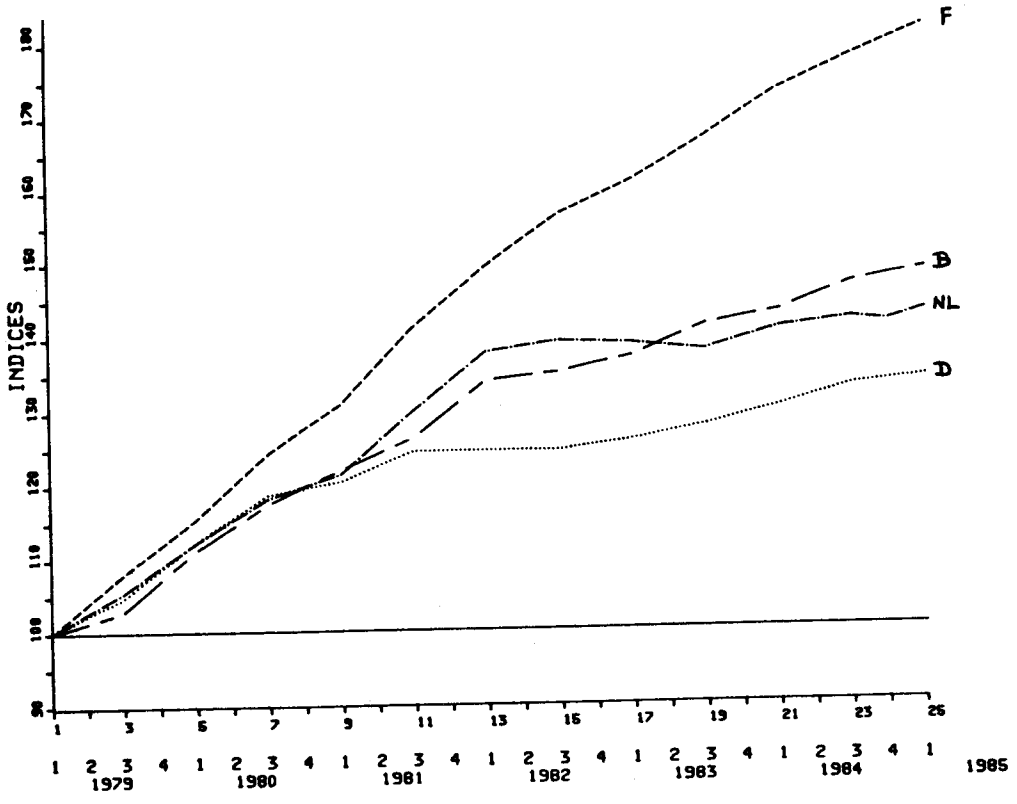
After an increase of overall costs of 3.7% in 1982 and 2.4% in 1983, costs increased by 4.3% in 1984. Fuel costs decreased slightly in the first half of 1984, but went up to above the 1.1.1984-level during the second half.

Since 1979 most cost elements showed a rise of 20 to 50%, but fuel costs went up by about 170%. As Rhine navigation tends to be a bit more fuel consuming per tkm than North-South traffic, this has led to a higher cost index. However in 1984 the rise of costs in North-South was higher (+ 5.1%) than on the Rhine (+ 3.7%), mainly due to differences in the development of wages.

3.8.3. Total cost development by nationality of the carrier (in national currency)

If costs are monitored in national currency, big differences appear between cost developments by flag, mainly due to differences in inflation rates.

Figure 3.2.: Overall cost indices in national currency



In the following table cost increases in 1984 are broken down by nationality of the carrier.

Table 3.24.: Total cost indices by nationality of the carrier in national currency (1.1.1979 = 100).

	B (BF)	D (DM)	F (FF)	NL (HFL)
1.1.1984	142.8	130.0	172.0	140.5
1.7.1984	146.5	132.7	177.5	141.7
1.1.1985	148.2	133.7	181.5	142.6
Increase 1984	+ 3.8%	+2.8%	+5.5%	+1.5%

A registration of costs and prices in national currency includes so many monetary effects that it is not possible to get a clear and separate view of the developments in the transport market. Therefore the rest of the analyses will be based on ECU.

3.8.4. Cost developments by shiptype (in ECU)

Table 3.25.: Cost indices (total costs) by shiptype in ECU

Year	350 tons	600 tons	1200 tons	pushed units
1.1.1979	100.0	100.0	100.0	100.0
1.1.1980	109.8	107.9	111.9	111.3
1.1.1981	117.7	113.4	118.6	116.7
1.1.1982	131.4	128.4	135.4	135.0
1.1.1983	134.1	130.4	141.7	142.6
1.1.1984	137.4	133.2	144.5	145.3
1.7.1984	142.0	136.8	147.7	148.5
1.1.1985	145.7	139.5	150.1	149.3

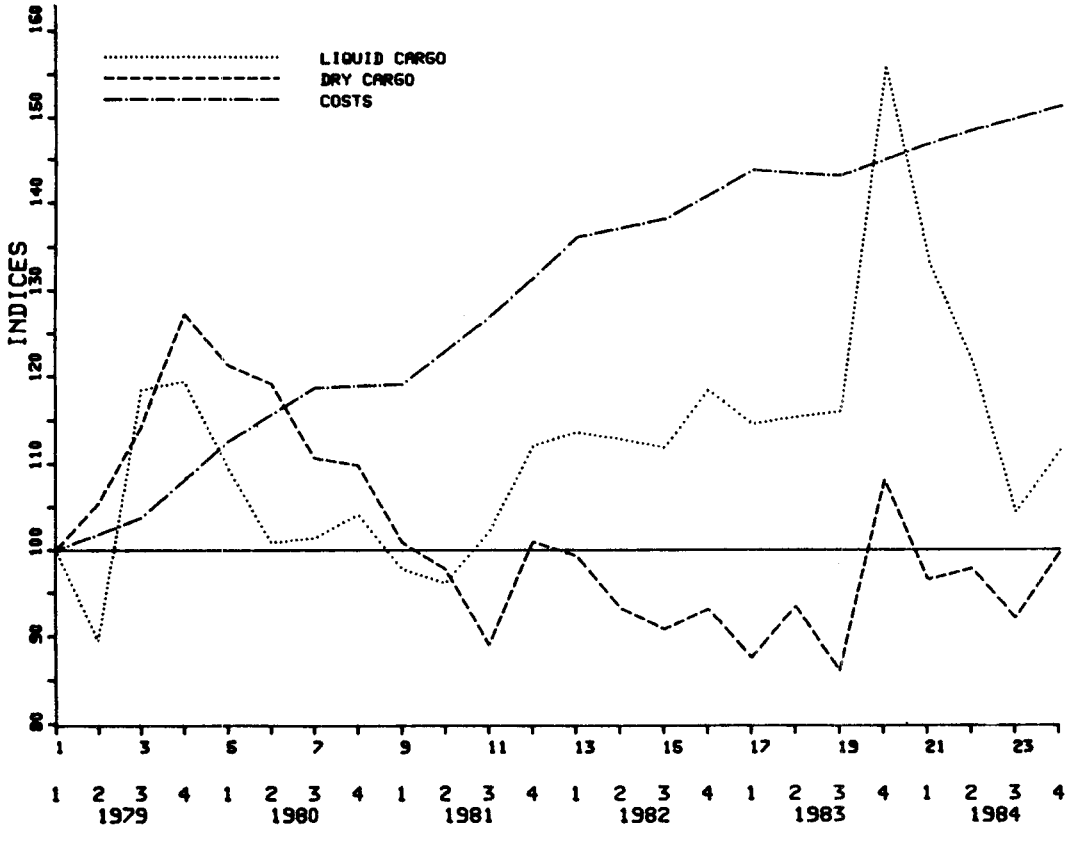
Although the incidence of the fuel cost increase since 1979 was more strongly felt for the bigger shiptypes, the differences in cost developments over the years were relatively small. During the last year, 1984, costs increased more for small vessels than for big ones, respectively: + 6.0%, + 4.7%, + 3.9% and + 2.8%.

3.8.5. Comparison between cost and price developments by market

a) Rhine market

A comparison of indices for costs per trip and prices per ton on the Rhine is given below.

Figure 3.3.: Cost and price developments for Rhine traffic in ECU



Dry cargo

The year 1979 is considered to be the latest year with equilibrium between demand and supply. The decrease of demand in 1980 and 1981, without a simular reduction of the European fleet, created a strong pressure on prices. Since 1982 costs went further up, while prices stayed more or less on the same level. The graph shows that the increasing demand in 1984 (volumes dry cargo Rhine = + 7.0% compared to 1983) did not have much effect on prices. A first explanatory factor is that the growth was mainly concentrated in the iron-ore sector. As this commodity is transported by big push-tow units the rest of the fleet could not benefit much from this increase in demand. An other factor is that the existing overcapacity is of such proportion that it blocks the normal respons on increasing demand.

Liquid cargo

The high peak in prices for liquid cargo towards the end of 1983 was caused by a strong increase of demand in '83 (+ 19% compared to '82) in combination with low water levels on the Rhine during the latest quarter, which caused an incidental shortage of tanker capacity on the spot-market.

In general it was felt, during 1982 and 1983, that there was not such an overcapacity in tankers as in dry cargo vessels. However, in 1984 a great deal of this relatively better position has been lost, because demand in liquid cargo did not increase as in dry cargo (Rhine traffic: oil products - 2.4%, chemicals + 12.7%, total liquid + 1%).

Conclusion (Rhine market)

If the price/cost-ratio of 1979 is set as a standard, then at the end of 1984 prices in liquid cargo were 40% and in dry cargo 50% below the desired level.

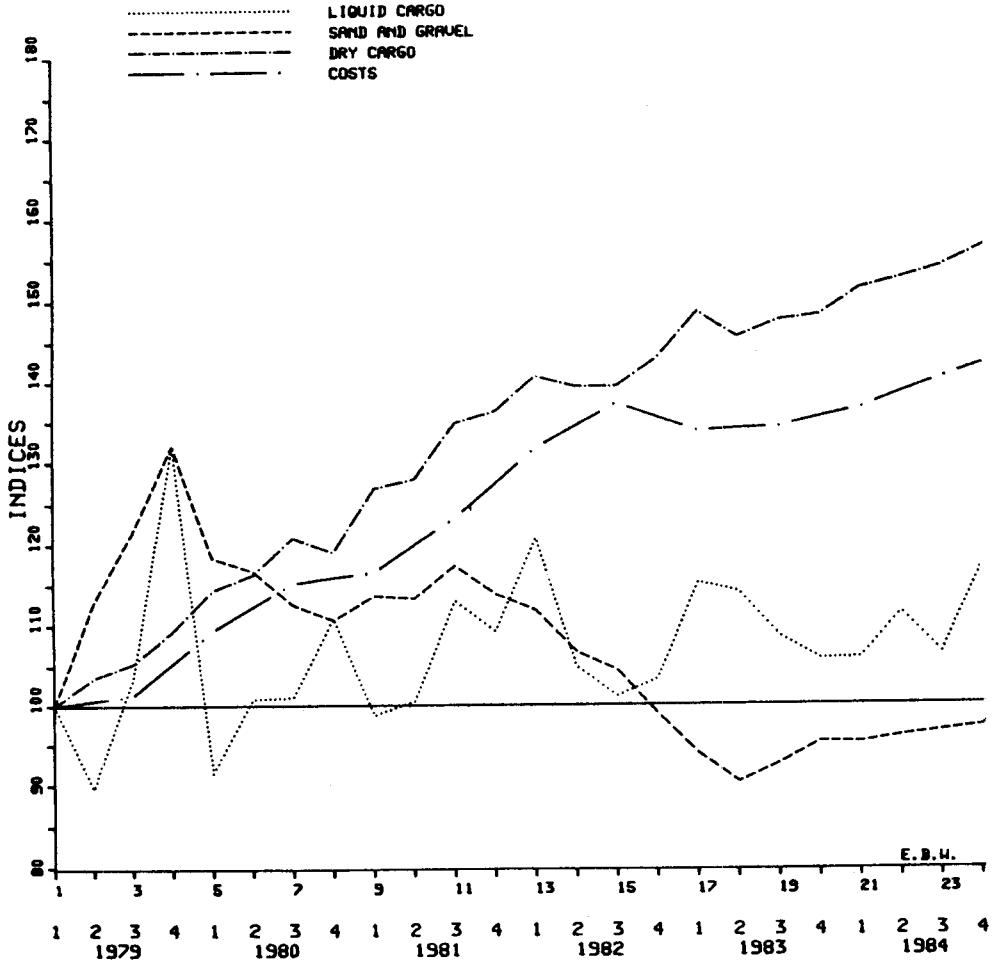
b) North-South market

In international North-South traffic there are different market regimes, which results in different price developments.

* The market for liquid cargo is free, as it is on the Rhine. The same applies for most of the sand and gravel transports.

* The rest of dry cargo is in principle subject to a tour de rôle system, although there are exceptions for certain transports between NL and B. Prices in this regulated market are fixed after negotiations between representatives of transporters and shippers in the tariff committees, or by transporters unilaterally.

Figure 3.4.: Cost and price developments for international North-South traffic, in ECU.



Prices in the free segment of the market (liquid + a great percentage of sand and gravel) show roughly the same pattern as on the Rhine (except from the peak in liquid Rhine prices end '83/begin '84).

Prices in the regulated market follow in general the cost indices. During 1983 prices showed an additional rise. The reason for this seems to be, that the basis of the tariffs, which was chosen during the crisis of 1975/1976, was found too low, and corrected by an incidental upgrading of the tariffs.

As the prices in the regulated market are currently more attractive for the transporters than on the free market, the overcapacity in dry cargo vessels tends to concentrate on the waiting lists of the tour de rôle-systems (including the tour de rôle systems for domestic transport in NL and B). This leads to an increase of waiting times, see § 3.7.2., which has a similar negative effect on the profitability as the low prices on the free markets.

CHAPTER 4

RAIL

4.1 Introduction

The continuous drop since 1979 of international rail transport was slowed down in 1983. In 1984, however, an important increase in rail transport could be noted.

Total tonnage increased with 15.0% or 9 million tonnes compared with 1983, after a number of years with decreases: 1983: - 1,4%; 1982: - 10,8%. For 1985 an increase of 10.6 is expected (1).

4.2 Intra EUR-10 international rail activity in 1984

Table 4.1 gives the EUR-10 matrix of tonnages moved by rail.

Ingoing data have been retained for all countries except for the UK where exporting figures of the partner country have been used (due to a lack of split of the UK ingoing data).

In the table Belgium and Luxembourg have been taken together for the sake of conformity with what has been done in the chapters on road and inland waterways for the year 1984.

As far as Ireland is concerned, the only international rail traffic is between Ireland and Northern Ireland. On this relation no information has been communicated.

(1) See "Analysis and Forecasts 1985".

Table 4.1: Intra EUR-10 international rail traffic '000 tonnes and % growth rate

	D	F	I	NL	B/L	UK	IRL	DK	GR	TOTAL
D	---	6 071 6 403 + 5.5	4 506 5 451 + 21.0	1 580 1 966 + 24.4	4 500 5 235 + 16.3	135 112 - 17.0	--- --- 	714 687 + 3.8	78 84 + 7.7	17 584 19 938 + 13.4
F	3 589 3 726 + 3.8	---	6 155 8 057 + 30.9	447 478 + 6.9	5 843 6 525 + 11.7	214 245 + 14.5	--- --- 	70 84 +20.0	20 27 +35.0	16 338 19 142 + 17.2
I	2 190 2 257 + 3.1	1 896 1 723 - 9.1	---	433 494 + 14.1	742 1 010 + 36.1	382 441 + 15.4	--- --- 	60 65 + 8.3	25 29 +16.0	5 728 6 019 + 5.1
NL	3 420 3 639 + 6.4	1 133 1 356 + 19.7	489 515 + 5.3	---	740 895 + 20.9	28 24 - 14.3	--- --- 	13 12 - 8.0	4 4 0.0	5 827 6 445 + 10.6
B/L	3 068 3 137 + 2.2	5 138 5 982 + 16.4	1 070 1 357 + 26.8	1 799 1 916 + 6.5	2 887 * 4 509 + 56.2	68 66 - 2.9	--- --- 	34 48 +41.2	8 8 0.0	14 072 17 023 + 21.0
UK	58 95 + 63.8	32 37 + 15.6	179 218 + 21.8	6 10 + 66.6	29 36 + 24.1	---	---	0 0 	0 0 	304 396 + 30.3
IRL	---	---	---	---	---	---	---	---	---	---
DK	410 342 - 16.6	25 19 - 24.0	28 51 + 82.1	5 10 +100.0	39 39 0.0	2 0 -100.0	--- --- 	---	0 1 	509 462 - 9.2
GR	45 51 + 13.3	3 3 0.0	5 3 - 40.0	9 6 - 33.3	0 0 	0 0 	--- --- 	0 0 	--- 	62 63 + 1.6
EUR-10	12 780 13 247 + 3.7	14 298 15 523 + 8.6	12 432 15 652 + 25.9	4 279 4 880 + 14.0	14 780 18 249 + 23.5	829 888 + 7.1	--- --- 	891 896 + 0.6	135 153 +13.3	60 424 69 488 + 15.0

* 1983: B → L: 2 184
L → B: 703
2 887

1984: B → L: 3 367
L → B: 1 142
4 509

Above figure in each cell = 1983 tonnage
Second figure in each cell = 1984 tonnage
Third figure in each cell = % change 1984/1983

As the table shows, the important upswing of traffic of 15.0% was shared by all relations, with only a few exceptions, of which the most important follow:

I → F	- 173 000 tonnes	- 9.1%
DK → D	- 68 000 " "	- 16.6%
D → UK	- 23 000 " "	- 17.0%
other relations	- 20 000 " "	

In total ingoing or outgoing traffic, only outgoing traffic flows from Danmark shows a negative development:
- 47 000 tonnes or - 9.2%.

All the other flows of ingoing and outgoing traffic show positive growth rates; more than one mio tonnes increase has been recorded for the following relations:

B/L	+ 3 469 000 tonnes	+ 23.5%
I	+ 3 220 000 " "	+ 25.9%
B/L	+ 2 951 000 " "	+ 21.0%
F	+ 2 804 000 " "	+ 17.2%
D	+ 2 354 000 " "	+ 13.4%
F	+ 1 225 000 " "	+ 8.6%

As far as individual bilateral relations are concerned, the following relations showed increases of more than 0.5 mio tonnes:

F → I	1 902 000 tonnes	+ 30.9%
B → L	1 183 000 " "	+ 54.2%
D → I	945 000 " "	+ 21.0%
B/L → F	844 000 " "	+ 16.4%
D → B/L	735 000 " "	+ 16.3%
F → B/L	682 000 " "	+ 11.7%

The total increase on these relations, which represent about 50% of the total international traffic, is 6.3 mio tonnes or 70% of the total increase in tonnes. All the important relations, defined as those on which more than 5 mio tonnes was carrierd in 1984, gained more than 10% with the exception of the relation D→F which showed only an increase of 332 000 tonnes or 5.5%.

4.3 NST categories

The 1984 breakdown by NST chapters is not yet available from the Statistical Directive; so in order to get an idea of the variations within NST chapters, other sources have been used. Data for 1984 are partially estimated.

Analysis of the data per NST-category indicates that the turnover of rail transport is based on a restricted number of NST-categories, which have suffered more than proportionally from the recession and structural difficulties in the past few years.

Table 4.2 Breakdown by main NST Chapter (mio tonnes)

	NST 2	NST 4	NST 5	NST 9	Remainder	Total
1983	8.2	7.8	12.0	12.0	20.3	60.3
1984	10.7	8.5	13.6	13.1	22.8	68.7
1984 on 1983 changes						
mio tonnes	+ 2.5	+0.7	+ 1.6	+1.1	+ 2.5	+ 8.4
%	+30.5	+9.0	+13.3	+9.2	+12.3	+13.9

However, in 1984 the steel sector, in particular its exports, went rather well because of the high value of the dollar and consequently the transport of coal, ore and steel products increased by about 10-15%. Moreover, the low water levels on the Rhine might have generated more rail traffic in general.

The important increase for coal of 30%, well above the average, could also partly be explained by traffic generated by the strike of the miners in the U.K.

Of the remaining goods categories, the transport of foodstuffs and animal fodder (NST 1; + 16%°), fertilizers (NST 7; + 25%) and chemicals (NST 8; + 22%) increased more than average. Of the traditional goods only coal increased in share of total traffic, as is shown in the next table.

Table 4.3 Relative importance of NST-categories in total rail transport

	NST 2	NST 4	NST 5	NST 9	Remainder
1983	13.6	12.9	19.9	19.9	33.7
1984	15.6	12.4	19.8	19.1	33.1

The development in the market share of the railways in the transport of NST 2, 4, 5 and 9 is shown in the following table.

Table 4.4 Share of rail transport for four important NST-categories (%)

	NST 2	NST 4	NST 5	NST 9
1983	36.7	18.1	32.2	19.6
1984	41.0	19.7	33.9	20.1

In all the main good categories the railways reinforced its position.

4.4 Railway Price Indices

4.4.1 Coverage

Price surveys are being carried out in Germany, France, Italy, Belgium and the Netherlands. The four railways agreed on the method of a "basket" of representative commodities defined for each directed relation from actual traffic data for the reference period (1981). SNCF have applied the method on the following links: France-Germany, France-Italy, France-Belgium and Germany-Netherlands. FS on Italy-France and SNCB on Belgium-Netherlands. NS has joined the experiment during 1984.

4.4.2 Price developments by relation

The quarterly data are now being published in the Market Development reports taking 31 December 1981 as 100. For 1984 the following price developments could be noted:

traffic relation	index		increase (%) in 1984
	31.12.1983	31.12.1984	
D → F	116	121	4.3
D I	-	116	-
D NL	111	114	2.7
D B/L	112	117	4.5
F → D	116	121	4.3
F I	134	144	7.5
F NL	122	128	4.9
F B/L	125	134	7.2
I → D	-	-	-
I F	130	140	7.7
I NL	-	134	-
I B/L	-	145	-
NL → D	110	112	1.8
NL F	112	117	4.5
NL I	-	122	-
NL B/L	112	128	14.3
B/L → D	121	122	1.0
B/L F	125	133	6.4
B/L I	129	136	5.4
B/L NL	116	124	6.9

Important price increase of more than 6% could be noted on the relations NL → B, F → I and F → B. In general, these increases relate to the inflation rate but, in particular, NL → B/L this only explains a small part of the increase of 14.3%.

CHAPTER 5

COMBINED TRANSPORT

The following data have been established with the assistance of INTERCONTAINER (Société internationale pour le Transport par Transcontainers) for the container traffic and of INTERUNIT (Société internationale pour le transport par ferroutage) for the piggy-back traffic.

5.1 Container transport 1984

5.1.1. After dropping for two years and a recovery in 1983, Intercontainer reached and improved its 1980 result in 1984: 825.000 TEU (*) against 811.500 TEU in 1980. The details of this development are shown in the following table.

Table 5.1 Development of total Intercontainer container traffic (in TEU)

year	traffic	in/decrease	growth rate
1980	811.500		
1981	783.750	- 27.750	- 3.4%
1982	718.500	- 65.250	- 8.3%
1983	760.750	+ 42.000	+ 5.8%
1984	824.750	+ 64.000	+ 8.4%

In TEU-km the development in 1984 was even better, as is shown in the following table.

Table 5.2 Development of total Intercontainer container traffic (in '000.000 TEU-km)

year	traffic	in/decrease	growth rate
1980	623.7		+ 6.1%
1981	605.9	- 17.8	- 2.9%
1982	556.2	- 49.7	- 8.2%
1983	606.7	+ 50.5	+ 9.1%
1984	667.9	+ 56.2	+ 9.3

(*) TEU: Twenty foot equivalent unit.

Traffic to and from the ports is by far the most important container traffic. In the following table the development of the various types of container traffic are shown.

Table 5.3 Container traffic by type, in TEU and %.

year	maritime container traffic		continental traffic		UK + Ireland		USSR	
	number	%	number	%	number	%	number	%
1981	467.000	59.6	250.750	32.0	41.500	5.3	24.500	3.1
1982	424.500	59.1	245.000	34.1	33.750	4.7	15.000	2.1
1983	444.500	58.4	264.500	34.8	31.500	4.1	20.000	2.6
1984	478.500	58.0	293.000	35.5	32.000	3.9	22.000	2.7

Although by far the most important, the maritime container traffic is slowly decreasing in share, while continental traffic is increasing in importance every year. Container traffic to and from the UK and Ireland is loosing continuously, and traffic with the USSR and over the Trans-Siberian railroad showed an erratic pattern during the last few years. Competition with sea transport is very sharp and the increase shown is mainly due to increased transport of containers to China.

5.1.2. The following table shows the Intercontainer traffic by relation.

Table 5.4 Intercontainer traffic by relation (number of containers).

	D	F	I	NL	B/L	UK	IRL	DK	GR	TOTAL
83		7 909	36 837	11 846	6 850	549	1	18 360	1 513	83 865
D 84	-	7 414	38 465	15 719	7 678	273	0	20 256	1 472	91 287
84/83		- 6.3%	+44.0%	+32.7%	+12.1%	-50.2%	-100.0%	+10.3%	- 2.7%	+ 8.8%
83	6 240		18 445	2 846	9 279	123	4	170	6	37 113
F 84	6 559	-	21 016	3 104	11 670	159	0	282	153	42 943
84/83	+ 5.1%		+14.0%	+ 9.1%	+25.8%	+29.3%	-100.0%	+65.9%		+15.7%
83	36 611	18 856		26 800	26 240	20 028		154	93	128 782
I 84	36 719	18 495	-	25 646	25 038	20 654		1 537	99	128 188
84/83	+ 0.3%	- 1.9%		- 4.3%	- 4.6%	+ 3.1%			+ 6.4%	- 0.5%
83	13 964	2 691	19 013		29 706	4		800	52	66 230
NL 84	18 326	2 901	24 515	-	33 442	3		785	119	79 091
84/83	+31.2%	+ 7.8%	+28.9%		+12.6%	-25.0%		- 1.9%	+129.0%	+19.4%
83	11 528	12 337	25 339	31 101		0		1 750	0	82 075
B/L 84	10 938	13 886	28 352	38 179	-	2		1 520	55	92 932
84/83	- 5.1%	+12.6%	+11.9%	+22.8%				+13.1%		+13.2%
83	186	654	8 381	29					2	9 252
UK 84	206	143	10 005	40		-			0	10 394
84/83	+10.8%	- 7.8%	+19.4%	+37.9%					-100.0%	+12.3%
83	1	11	0							12
IRL 84	0	0	13				-			13
84/83		-100.0%								+ 8.3%
83	18 913	195	266	365	1 653	61				21 453
DK 84	18 123	110	1 433	291	1 763	0		-		21 720
84/83	- 4.2%	-43.6%	-43.8%	-20.3%	+ 6.7%	-100.0%				+ 1.2%
83	750	79	100	36	0	0				947
GR 84	686	139	90	26	17	7			-	965
84/83	- 8.5%	+75.9%	-100.0%	+27.8%						+ 1.9%
TOTAL										
83	88 198	42 726	108 381	73 023	73 754	20 765	5	21 234	1 666	429 729
84	91 557	43 088	123 889	83 005	79 618	21 098	0	24 380	1 898	468 533
84/83	+ 3.8%	+ 0.8%	+14.3%	+13.7%	+ 8.0%	+ 1.6%	-100.0%	+14.8%	+13.9%	+ 9.0%

Although the number of container carried between the U.K. and Ireland on the one hand and the continental Member States on the other hand give rise to a number of question marks concerning the figures, this table gives a first indication of the importance of the various relations between Member States and their development in 1984 compared to 1983.

As in the case of pure international railway traffic, Italy, Germany, Belgium and France carry most of the traffic, but for international container traffic, also the position of the Netherlands and, to a lesser extent Danmark, is of relatively great importance.

Of total ingoing and outgoing traffic, only outgoing traffic of Italy decreased in 1984 compared to 1983; for all other Member States important increases could be noted.

On the important bilateral relations ($>$ 10.000 units in 1984) only five showed a negative growth rate with a total decrease of 4 097 units:

I ⟶ B/L	- 1 202 units	- 4.6%
I ⟶ NL	- 1 154 units	- 4.3%
DK ⟶ D	- 790 units	- 4.2%
B/L ⟶ D	- 590 units	- 5.1%
I ⟶ F	- 361 units	- 1.9%

Of those important relations with a positive growth rate the following relations showed an increase of more than 2 500 units:

B/L ⟶ NL	+ 7 078	+22.8%
NL ⟶ I	+ 5 502	+28.9%
NL ⟶ D	+ 4 362	+31.2%
D ⟶ NL	+ 3 873	+32.7%
NL ⟶ B/L	+ 3 736	+12.6%
B/L ⟶ I	+ 3 013	+11.9%
F ⟶ I	+ 2 571	+14.0%

The increases on these 7 relations explain 77.7% of the total increase of 38 804 units.

5.1.3 For 1982 and 1983 figures are now available from the Council statistical directive for rail transport. The figures relate to national and international container traffic in number of containers, full and empty, and in tonnage by Member State.

In the tables 5.3 and 5.4 the information is represented starting with the number of containers transported.

Table 5.5 Number of containers (loaded + empty) transported by rail (x 1 000)

Country	National traffic			International traffic (loading + transit)		
	1982	1983	growth %	1982	1983	growth %
Community	2 054	2 221	8.1	417 *	419 *	0.5
F.R.G.	458	453	- 1.1	198	208	5.1
France	480	449	- 6.5	94	104	10.6
Italy	119	121	1.7	77	84	9.1
Netherlands	59	61	3.4	66	63	- 4.5
Belgium	80	93	16.2	99	108	9.1
Luxembourg	1	2	100.0	0	0	0.0
United Kingdom	724	904	24.9	2	1	- 50.0
Ireland	101	104	3.3	-	-	-
Danmark	33	34	3.3	27	33	22.2
Greece	-	-	-	1	1	0.0

(*) To avoid double contings in the case of transit only the total number of loaded containers is given. Because of the difference in source this figure for 1983 is not comparable with the figure for total in/outgoing intercontainer traffic in table 5.4.

In national traffic, the number of containers transported by rail increased by 8.1%. However, the increase in national traffic can be explained by the increase of 25% in U.K. national traffic. Taking this into account the evolution in 1983 for the other nine Member States taken together is slightly negative (- 1%). In international traffic the situation was almost stable in 1983 compared to 1982.

Table 5.6 Tonnage transported with containers by rail ('000 tonnes)

Country	National traffic			International traffic (loading + transit)		
	1982	1983	growth %	1982	1983	growth %
Community	19 033	21 684	13.4	5 208*	5 632*	8.1
F.R.G.	3 178	3 143	- 1.1	2 200	2 325	5.7
France	3 415	3 340	- 2.2	1 368	1 697	24.0
Italy	1 725	1 884	9.2	1 306	1 497	14.6
Netherlands	441	575	7.7	754	783	3.8
Belgium	704	862	22.4	1 268	1 529	20.6
Luxembourg	9	19	111.1	2	1	- 50.0
United Kingdom	8 104	10 399	28.3	27	12	- 55.6
Ireland	1 131	1 113	- 1.6	-	-	-
Danmark	326	350	7.4	297	379	27.6
Greece	-	-	-	10	11	10.0

(*) See table 5.3.

In general, the situation is more positive or less negative, whatever the case may be, in terms of tonnage compared with the development of the carriage of the number of containers. Also for the individual Member States this applies. This implies that the average weight by loaden container increased and/or that the number of empty containers carried decreased. Table 5.7 showes the share of empty containers in total container traffic in 1982 and 1983.

Table 5.7 Number of empty containers as percentage of all containers

Country	National traffic		International traffic loading		Transit traffic	
	1982	1983	1982	1983	1982	1983
F.R.G	36.5	37.3	31.8	29.5	21.1	21.6
France	48.2	47.4	44.3	30.9	5.2	4.4
Italy	46.8	43.6	26.6	25.0	86.2	93.8
Netherlands	46.7	38.9	33.9	30.3	0.0	0.0
Belgium	31.3	29.7	23.6	24.5	49.5	12.6
Luxembourg	49.9	50.0	66.2	66.4		
United Kingdom	7.6	7.0				
Ireland	38.6	39.4				
Denmark	32.9	28.7	11.4	9.4	47.8	46.8
Greece			56.4	46.3		
Total	29.8	27.0	29.8	26.9		

In 1983 the number of empty containers as percentage of all containers moved by rail decreased in relation to 1982. On the other hand, the average weight of loaden containers increased from 1982 to 1983 (from 13.2 tonnes to 13.4 tonnes in national traffic and from 17.8 tonnes to 18.4 tonnes in international traffic (loading), as a comparison of tables 5.6 and 5.5. shows.

5.2 Piggy-back transport

The data are based on the number of units despatched by the "organizing" company, i.e. the number of semi-trailers, swap-bodies or road trains etc. carried by rail wagons.

The increase in piggy-back which started in the fourth quarter 1983 after a slump period of one year and a half, continued in 1984. The quarterly growth figures related to the same quarter of last year were as follows:

Q 1: + 39%; Q 2: + 20%; Q 3: + 17%; Q 4: + 18%.

Over the year, the number of despatches increased by 24.1% as is shown in the following table.

Table 5.8 Number of despatches in international piggy-back transport by company

Country of despatch	Units despatched		in-decrease
	1984	1983	
Kombiverkehr (D)	68 940	54 214	27.2%
Novatrans (F)	9 222	10 199	- 9.6%
(I, not to D)	20 492	13 407	34.6%
(U.K.)	5 874	4 614	27.3%
Ferpack (I, to D)	10 918	8 936	22.2%
Trailstar (NL)	5 814	5 451	6.7%
TRW (B)	14 913	12 868	15.9%
	136 173	109 716	24.1%

With the exception of a part of Novatrans business all companies show impressive growth figures. Growth figures on some important relations are shown in the following table.

Table 5.9 Important intra-Community relations

Transport Relations		Units despatched		
		1984	1983	in-decrease
D →	I	33 621	31 894	+ 5.4%
I	D	10 918	8 936	+ 22.2%
B	I	10 001	8 137	+ 22.9%
I	B	8 341	-	-
U.K.	I	5 747	4 584	+ 25.4%
I	U.K.	7 135	5 244	+ 36.1%
F	I	5 198	6 765	- 23.2%
I	F	5 016	5 353	- 6.3%
NL	I	4 303	4 394	- 2.1%

The most important relations are situated on the North/South axle. On these relations to and from Italy, important growth figures could be noted with the exceptions of the relations to and from France and from the Netherlands.

CHAPTER 6

MODAL SPLIT COMPARISON OF NATIONAL AND INTERNATIONAL TRANSPORT IN TONNE-KILOMETRES

6.1 Introduction

Whereas the development of international transport has traditionally been measured in tonnes, the development of national transport has more often been examined in tonne-kilometres due to the preponderance of very short movements for national traffic by road. The availability of the results from the three statistical directives for 1982 (complete results for 1983 are not yet available) makes a direct comparison of national and international transport by mode possible for the first time on a reasonably consistent statistical basis.

Note that a) Road. National tonne-kilometres for Italian hauliers have been estimated by deducting the estimated international tonne-kilometres (see chapter 2) from the total published by ECMT.

b) Rail. Only total transit tonne-kilomtres for German railways are available (4195 mio), the split between intra-Community and extra-Community has been estimated from intra-Community tonnage movement.

c) Inland waterway. National tonne-kilometres on the Dutch network by flag in Table 6.2 have been adjusted to the total for all goods.

6.2 Summary results for tonne-kilometres, 1982

Table 6.1

The principal results shown in Table 6.1 relate to carriers from EUR-10 on the Community network. In intra-Community traffic, the shares are 70% (road), 19% (rail) and 11% (inland waterway). In national traffic road (76%) dominates ever more and inland waterways is much smaller (5%). National traffic accounts for 78% of intra-Community traffic.

Further analysis of EUR-10 carriers is restricted by the absence of data for road for international extra-Community. For rail and inland waterway, international extra-Community represent 13% and 4% respectively of total tonne-km by Community hauliers. Analysis of non-Community carriers is limited to inland waterway as data for road is unavailable and for rail is impossible. Non-Community carriers account for 9% of all tonne-km on the Community inland waterway network.

Table 6.2

This table shows the shares of the three modes for carriers from each Member States. From this table it can be seen that road has at least a 85% share in all Member States except where there is substantial inland waterway traffic (i.e. I, UK, IRL, DK and GR). Similarly rail only exceeds 15% in four Member States (D, F, B and L) and inland waterway only exceeds 10% in three Member States (D, NL and B).

A more detailed breakdown of the above tables and the definition used are given in the Sections which follow.

TABLE 6.1.

GOODS TRANSPORT ON THE COMMUNITY NETWORK
(mio tonne-km)

1982 SUMMARY

Carriers	Type of transport	Road	Rail	Inland Waterway	Total
EUR-10	National	436 239 (76%)	105 704 (19%)	27 721 (5%)	569 664 (100%)
	International intra-Commun.	75 837 (46%)	32 300 (20%)	56 315 (34%)	164 452 (100%)
	Total intra-Community	512 076 (70%)	138 004 (19%)	84 036 (11%)	734 116 (100%)
	International extra-Commun.	n.a.	20 458	3 500	n.a.
	Total	n.a.	158 462	87 536	n.a.
Non-Community	National	n.a.	0	609	n.a.
	International intra-Commun.	n.a.	0	4 686	n.a.
	International extra-Commun.	n.a.	0	3 678	n.a.
	Total	n.a.	0	8 973	n.a.
All	Total	n.a.	158 462	96 509	n.a.

TABLE 6.2

GOODS TRANSPORT BY EUR-10 CARRIERS ON THE COMMUNITY NETWORK
(mio tonne-km)

1982 TOTAL INTRA-COMMUNITY TRANSPORT
(NATIONAL + INTERNATIONAL INTRA-COMMUNITY)

Member State of carrier	Road t-km	%	Rail t-km	%	Inland Waterway t-km	%	Total t-km
D	107 573	59%	44 211	24%	30 999	17%	182 783
F	95 552	60%	53 248	34%	10 249	6%	159 049
I	137 071	91%	12 918	9%	317	0%	150 306
NL	31 799	47%	2 540	4%	33 463	49%	67 802
B	18 849	56%	6 209	18%	8 876	26%	33 934
L	712	51%	536	39%	132	10%	1 380
UK	94 674	85%	16 479	15%	-		111 153
IRL	4 459	87%	671	13%	-		5 130
DK	10 559	92%	865	8%	-		11 424
GR	10 828	97%	327	3%	-		11 155
EUR-10	512 076	70%	138 004	19%	84 036	11%	734 116

6.3 National transport, tonne-kilometres, 1982

Data available

National transport by inland waterways on the network of a particular Member State is available for carriers from the Member State concerned, another Member State or a non-Member State. National transport by road in a particular Member State is virtually restricted to carriers from the Member State concerned since movements by other carriers is usually forbidden, in any case no data on this type of transport is available. Transport by rail (national or otherwise) in a particular Member State is, evidently, restricted to the railway company(ies) of the Member State concerned.

Results

Table 6.3, which only relates to Community carriers, shows national movements by inland waterway carriers (both on their own national network and on the network of another Member State together with those for road and rail carriers, just on their own national network. The percentage in brackets for inland waterways is the percentage on the network of another Member State. The results show, that for the Community as a whole, the modal split for tonne-kilometres relating to national transport is

Road 76.5% Rail 18.6% Inland waterways 4.9%

and that 4.4% of the national tonne-kilometres for inland waterways are on the network of a Member State different from the carrier.

TABLE 6.3

GOODS TRANSPORT BY EUR-10 CARRIERS ON THE COMMUNITY NETWORK
(mio tonne-km)

1982 NATIONAL TRANSPORT

Member State of carrier	Road	Rail	Inland Waterway	Total
D	91 935	35 771	12 791 (0.3%)	140 917
F	81 878	41 346	5 941 (0.8%)	129 165
I	123 034	7 435	317 (0%)	130 786
NL	17 595	956	6 989 (14%)	25 540
B	10 201	2 415	1 681 (10%)	14 297
L	263	121	2 (100%)	386
UK	91 800	16 165	-	107 965
IRL	4 042	671	-	4 713
DK	6 969	569	-	7 538
GR	8 522	255	-	8 777
EUR-10	436 239	105 704	27 721 (4.4%)	569 664

6.4 International transport, tonne-kilometres, 1982

6.4.1 Data available

Data on international transport by inland waterways (whether Intra-Community or Extra-Community) on the network of a particular Member State is available subdivided by carriers from the Member State concerned, another Member State or a non-Member State - as is the case for national transport, see 6.3 above.

Data on international transport by rail (whether Intra-Community or Extra-Community) on the network of a particular Member State relates to the railway company(ies) of the Member State concerned - as is the case for national transport, see 6.3 above.

Data on international transport by road for intra-Community bilateral movements relates to movements by carriers from a particular Member State on their own national network, the network of the "partner" Member State and any "transit" network (including those of non-Member States) that may be used to reach the partner Member State; the results from the Statistical Directive do not, however, permit the tonne-kilometres on each of these three types of network to be identified separately. In consequence, it is possible, by adding together the results of carriers from all Member States to obtain the total tonne-kilometres performed on the Community network by Community carriers but not the tonne-kilometres performed on the separate national networks. It should also be noted that the following data on tonne-kilometres is not available for international road transport through the Statistical Directive.

- Transit movements between two non-Member States (whether by carriers from a Member State or a non-Member State)

- Extra-Community bilateral movements between a Member State and a non-member State (whether by carriers from the Member State or non-Member State concerned).

- Intra-Community movements between Member State A and Member State B by carriers from Member State C or a non-Member State ("cross-trades").

- Extra-Community movements between Member State A and a non-Member State D (whether by carriers from Member State B or non-Member State E, "external cross-trades").

While many of the above elements represent a very small fraction of the total tonne-kilometres, when combined together they would account for about 10% of the total load on the Community road network. Because of the absence of any information on tonne-kilometres on extra-Community road transport, further analysis considers intra and extra-Community transport separately.

6.4.2 International intra-Community transport, tonne-kilometres, 1982

Results

Table 6.4 shows the 1982 results by Member State of carrier on the Community network, together with (in the case of inland waterways) the percentage of the tonne-kilomitres on the network of another Member State. As explained in 6.4.1 above this split is not possible for road. The results show that the modal split for international intra-Community trasport is

Road 46.1% Rail 19.6% Inland Waterways 34.3%

Note also that 51% of the tonne-kilometres by inland waterways are on the network of a Member State different from the carrier.

6.4.3 International Extra-Community transport, tonne-kilometres, 1982

Results

Table 6.5 shows the 1982 results by Member State of carrier on the Community network. As explained in 6.4.1 the information for road is not available via the Statistical Directive. Again, the percentage in brackets for inland waterways represents the tonne-kilometres on the network of another Member State.

The results show that the modal split between rail and inland waterway for international extra-Community transport is

Rail 85% Inland Waterway 15%.

Note also that 59% of the tonne-kilometres by inland waterway are on the network of a Member State different from the carrier.

TABLE 6.4

GOODS TRANSPORT BY EUR-10 CARRIERS ON THE COMMUNITY NETWORK
(mio tonne-km)

1982 INTERNATIONAL INTRA-COMMUNITY TRANSPORT

Member State of carrier	Road	Rail	Inland Waterway		Total
D	15 638	8 440 (prov.)	18 208	(35%)	42 286
F	13 674	11 902	4 308	(70%)	29 884
I	14 037 (est.)	5 483	-		19 520
NL	14 204	1 584	26 474	(51%)	42 262
B	8 648	3 794	7 195	(81%)	19 637
L	449 (prov.)	415	130	(96%)	994
UK	2 874	314	-		3 188
IRL	417	-	-		417
DK	3 590	296	-		3 886
GR	2 306	72	-		2 378
EUR-10	75 837	32 300	56 315	(51%)	164 452

TABLE 6.5

GOODS TRANSPORT BY EUR-10 CARRIERS ON THE COMMUNITY NETWORK
(mio tonne-km)

1982 EXTRA-COMMUNITY TRANSPORT

Member State of carrier	Road	Rail	Inland Waterway	Total
D	n.a	12 096 (prov.)	1 625 (30%)	n.a
F	"	3 477	299 (80%)	"
I	"	3 235	-	"
NL	"	231	1 256 (92%)	"
B	"	579	320 (98%)	"
L	"	14	0 (-)	"
UK	"	-	-	"
IRL	"	-	-	"
DK	"	639	-	"
GR	"	187	-	"
EUR-10	n.a	20 458	3 500 (59%)	n.a

6.5 Detailed analysis of tonne-kilometres by inland waterway, 1982

6.5.1 Tonne-kilometres performed on the network of another Member State

In the previous sections it has been shown that 4% of (tonne-kilometres relating to) national transport, 51% of international intra-Community transport and 59% of international extra-Community transport are carried out on the network of a Member State different from the carrier.

Combining the detailed figures used in Table 6.3, 6.4 and 6.5 gives the overall results for all three types of transport (national, international intra and extra-Community); the results, shown in Table 6.6, indicate that 37% of the tonne-kilometres in inland waterway transport in the Community are performed on a network different from the Member State of the carrier, and that this figure varies considerably between carriers of different Member States. While geographical considerations evidently play an important part, the high percentage recorded for carriers from some Member States, especially Belgium, are noteworthy (the exceptionally high figure for Luxembourg is due to the shortness of the Moselle in Luxembourg and the fact that Luxembourg only has one port, i.e. domestic movements are impossible).

TABLE 6.6

GOODS MOVEMENTS BY EUR-10 CARRIERS ON THE COMMUNITY NETWORK
(mio tonne-km)

1982 INLAND WATERWAYS

Member State of carrier	on network of Member State of carrier	on network of another Member State	on Community network
D	25 812	6 810 (21%)	32 624
F	7 265	3 283 (31%)	10 548
I	317	0 (0%)	317
NL	19 239	15 480 (45%)	34 719
B	2 911	6 285 (68%)	9 196
L	5	127 (96%)	132
UK	-	-	-
IRL	-	-	-
DK	-	-	-
GR	-	-	-
EUR-10	55 549	31 987 (37%)	87 536

6.5.2 Tonne-kilometres performed on each Member State network

Since data is available for carriers from each Member State on each Member State network (details are given in the next section), the data can be summarized to give the tonne-kilometres performed on each network.

Data is also available for carriers from non-Member States on each Member State network so that the total tonne-kilometres on each Member State network can be calculated. Details are given in Table 6.7 which distinguishes, for each national network, the carriers from the Member State concerned, other Member States and non-Member States; the first column of figures is, by definition, the same as the first column in Table 6.6.

The results show that

1) 91% of tonne-kilometres on the Community network are performed by Community carriers and 9% by non-Community carriers.

2) Further, 58% of tonne-kilometres on the Community network are performed by Community carriers on their own national network and 33% by Community carriers on the network of another Member State.

3) Ignoring the exceptional cases of Italy (an entirely closed market to Italian carriers) and Luxembourg (which is almost entirely transitted by carriers from other States), the French network is the most dominated by its own carriers (71%) and the German network is the least dominated by its own carriers (52%).

4) Swiss carriers account for about 98% of the national and international intra-Community tonne-kilometres by non-Community carriers and 70% of international extra-Community tonne-kilometres by non-Community carriers on the Community network.

TABLE 6.7

GOODS TRANSPORT BY ALL CARRIERS ON THE COMMUNITY NETWORK
(mio tonne-km)

1982 INLAND WATERWAYS

Network	Carriers from Member State concerned	Carriers from other Member States	Carriers from non-Member States	Total
D	25 812	17 585	6 002	49 399
F	7 265	2 209	712	10 186
I	317	0	0	317
NL	19 239	10 020	2 104	31 363
B	2 911	1 907	137	4 955
L	5	266	18	289
UK	-		-	-
IRL	-		-	-
DK	-		-	-
GR	-		-	-
EUR-10	55 549	31 987	8 973	96 509

6.5.3 Tonne-kilometres performed by carriers from each Member State on each Member State network

Table 6.8 gives the details for carriers from each Member State on each Member State network with separate details for national, international intra-Community and international extra-Community movements. Italy has been excluded from this table as Italian carriers operate exclusively on the Italian network. This table provides the details from which the results in the previous sub-sections have been derived.

TABLE 6.8

GOODS MOVEMENTS BY EUR-6 CARRIERS
(mio tonne-km)
INLAND WATERWAYS

Nat.: National
Intic.: International Intra-Community
Intec.: International Extra-Community

Carrier		NETWORK					
		D	F	NL	B	L	TOTAL
D	Nat	12 748	20	15	8	-	12 791
	Intic	11 921	575	5 484	103	125	18 208
	Intec	1 143	153	324	5	0	1 625
	Total	25 812	748	5 823	116	125	32 624
F	Nat	30	5 896	10	5	-	5 941
	Intic	1 538	1 308	878	525	59	4 308
	Intec	171	61	65	2	0	299
	Total	1 739	7 265	953	532	59	10 548
NL	Nat	886	3	6 017	83	-	6 989
	Intic	11 822	443	12 990	1 161	58	26 474
	Intec	873	140	232	11	0	1 256
	Total	13 581	586	19 239	1 255	58	34 719
B	Nat	103	11	57	1 510	-	1 681
	Intic	1 840	820	3 115	1 396	24	7 195
	Intec	232	32	51	5	0	320
	Total	2 175	863	3 223	2 911	24	9 196
L	Nat	1	1	-	0	-	2
	Intic	89	11	21	4	5	130
	Intec	0	0	0	0	0	0
	Total	90	12	21	4	5	132
Total	Nat	13 768	5 931	6 099	1 606	0	27 404
	Intic	27 210	3 157	22 488	3 189	271	56 315
	Intec	2 419	386	672	23	0	3 500
	Total	43 397	9 474	29 259	4 818	271	87 219

Annex

SOURCES - QUELLEN

(a) Road Opinion Survey - Enquête de Conjoncture Route - Konjunkturerhebung Straßenverkehr

B Institut du Transport routier
DK Danmarks Statistik
D IFO (Institut für Wirtschaftsforschung)
F Centre de Productivité des Transports
GR Ethniki Statistiki Ypiresia (National Statistical Office)
IRL University College, Dublin
I Centro Studi sui Sistemi di Trasporto
L Service central de la Statistique et des Etudes économiques
NL Economisch Bureau voor het Weg- en Watervervoer
UK Department of Transport

(b) Road Cost Survey - Indices de coût Route - Kostenerhebung Straßenverkehr

D Bundesverband des Deutschen Güterfernverkehrs (BDF) e.V.
F Comité national routier
NL Economisch Bureau voor het Weg- en Watervervoer
B Instituut voor Wegtransport
L Fédération des Commerçants du Grand-Duché
UK Road Haulage Association Ltd.
DK Landsforeningen Danske Vongmaend

(c) Road Price Survey - Indices des prix Route - Preiserhebung Straßenverkehr

B Institut du Transport routier
D BÄG (Bündesanstalt für den Güterfernverkehr)
F Ministère des Transports
I Centro Studi sui Sistemi di Trasporto
L Ministère des Transports
NL NIWO (Nederlandsche Internationale Wegvervoer Organisatie)
CBS (Centraal Bureau voor de Statistiek)

(d) Inland Waterway Opinion Survey - Enquête de Conjoncture Voies Navigables Intérieures - Konjonkturerhebung Binnenschiffahrt

Rhine — Central Rhine Commission
North-South — B Institut pour le Transport par Batellerie
NL Economisch Bureau voor het Weg- en Watervervoer

(e) I.W. Cost Survey - Indices de coûts V.N. - Kostenerhebung Binnenschiffahrt

NL Economisch Bureau voor het Weg- en Watervervoer in collaboration with :
F Office national de la navigation
B Institut pour le transport par Batellerie
D Bundesverband der deutschen Binnenschiffahrt

(f) Rail Tariff Indices - Indices des tarifs du Rail - Tarifindizes für den Eisenbahnverkehr

D DB (Deutsche Bundesbahn)
F SNCF (Société nationale des chemins de fer français)
I FS (Azienda autonoma delle Ferrovie dello Stato)
NL NS (Nederlandse Spoorwegen)
B NMBS/SNCB (Société Nationale des Chemins de fer belges)

(g) Combined Transport - Transports Combinés - Kombinierter Verkehr

Intercontainer (container traffic - trafic conteneurisé - Containerverkehr)
Interunit (Piggy-back - Ferroutage - Huckepack)

(h) Road Tonnages - Tonnage de la Route - Straßengüterverkehr

D KBA-BAG Kraftfahrt-Bundesamtes und der Bundesanstalt für den Güterfernverkehr
F Ministère des Transports - Service des Transports routiers R-2
I Ministerio dei Trasporti - Dir. generale POC
NL CBS - Centraal Bureau voor de Statistiek
B/L INS - Institut national de Statistiques
UK GSS - Department of Transport
IRL University College, Dublin
DK Danmarks Statistik
GR Ethniki Statistiki Ypiresia

(i) I.W. Tonnages - Tonnages des Voies Navigables - Binnenschiffahrtgüterverkehr

ONI Office national de Navigation
CCR Commission Centrale pour la Navigation du Rhin
SOEC/OSCE/SAEG (Luxembourg) - Directive/Richtlinie 80/1119

Rail Tonnages - Tonnages Rail - Eisenbahngüterverkehr

SOEC/OSCE/SAEG (Luxembourg) - Directive/Richtlinie 80/1177

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