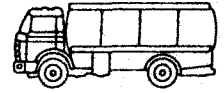
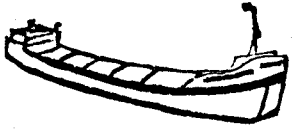
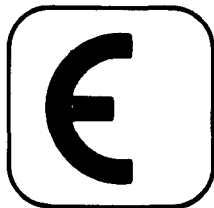


EUROPA TRANSPORT



OBSERVATION OF THE TRANSPORT MARKETS

MARKET DEVELOPMENTS



7

Published by the Directorate-General for Transport
European Communities Commission - 200, rue de la Loi, 1049 Bruxelles
Supplement to the Documentation Bulletin - D/TRANS/EN

MARKET DEVELOPMENTS

Manuscript finished in April 1983

7

Luxembourg: Office for Official Publications of the European Communities, 1983

ISSN 0252-2349

Catalogue number: CB-BC-83-007-EN-C

Reproduction authorized, in whole or in part, provided the source is acknowledged.

Printed in Belgium

PRESENTATION OF THE REPORT

The EUROPA TRANSPORT publications, which report the results of the Observation of the Transport Market System, have been restructured for 1982. Under the umbrella title of EUROPA TRANSPORT, the following three reports are published :

- Analysis and Forecasts
- Annual Report
- Market Developments.

The contents of this report (Market Developments), which is published quarterly, has been extended to cover the following subjects :

- recent developments in the goods transport market between Member States by road, rail and inland waterway;
- the results of quarterly opinion surveys carried out among international road hauliers;
- the results of six-monthly cost survey carried out among international road hauliers.
- the results of quarterly price surveys carried out among international road hauliers;
- the results of quarterly opinion surveys among inland waterway operators on two international networks, i.e. the Rhine and the North/South (North/South being inland waterway flows between the Netherlands, Belgium, and France but excluding traffic via the Rhine).

The surveys are undertaken by various organisations in the Member States, the list of these organisations is given in Annex 1.

SECTION 1: GENERAL SUMMARY

The gloomy overall situation in inland transport noted in the second quarter of 1982 has continued into the third quarter. Inland waterways has improved its relative position, road has declined slightly, and rail has fallen severely. The total tonnage for all three modes in the third quarter of 1982 has dropped more than three percent when compared with the same quarter of 1981, which was itself down on the preceding year.

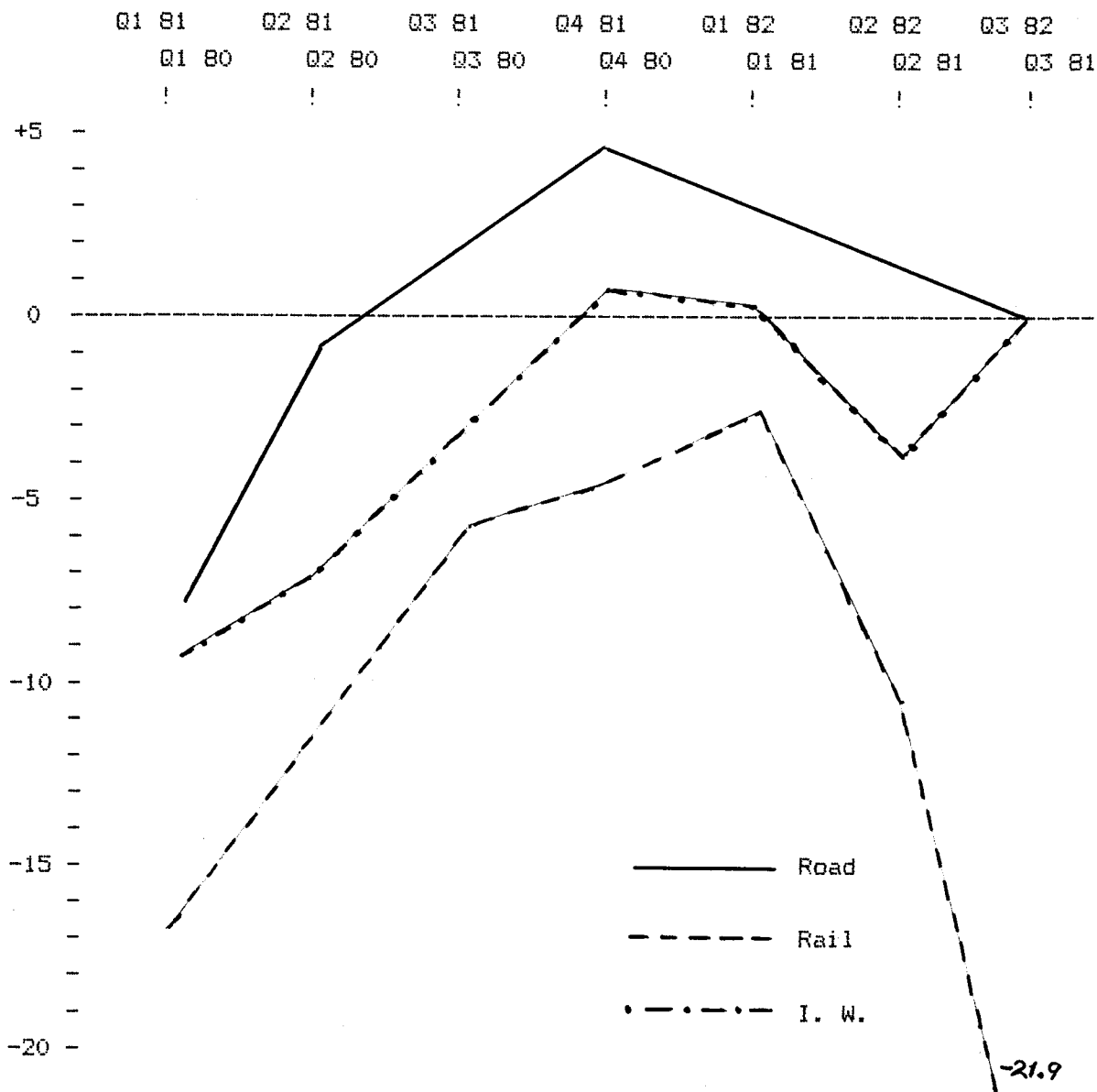
Total freight transport tonnage is estimated to have fallen by 1.2% in 1982, road transport being the only mode to return a positive figure, and 1983 is forecast to show a further decline.

SECTION 2 : GENERAL MARKET ASSESSMENT

2.1. Recent trends

The bad overall situation noted in the second quarter of 1982 has been reproduced at more or less the same level in the third quarter. However, there is a striking difference in how the individual modes have been affected, with inland waterways showing a very slight positive result, road falling to zero growth and rail continuing its precipitous drop which began at the beginning of the year (fig. 2.1.).

FIGURE 2.1.



2.1.1. The trends for individual modes are shown in table 2.1.

Table 2.1. Growth rates by mode of transport (percentage change of a particular quarter on the corresponding quarter of the previous year)

YEAR	Q1 81	Q2 81	Q3 81	Q4 81	Q1 82	Q2 82	Q3 82
MODE	Q1 80	Q2 80	Q3 80	Q4 80	Q1 81	Q2 81	Q3 81
Road	- 8.3	- 1.0	+ 2.0	+ 4.2	+ 2.9	+ 1.3	0.0
Rail	-16.3	-11.1	- 5.7	- 4.6	- 2.7	-10.2	-21.9
I.W.	- 9.9	- 7.1	- 3.0	+ 0.8	+ 0.1	- 3.9	+ 0.1
Total	-10.5	- 5.6	- 1.6	+ 1.2	+ 0.6	- 3.0	- 3.1

2.1.2. Modal Split

In the third quarter of 1982 road and inland waterways share of the market improved considerably, at the expense of rail which again hit an all-time low.

Table 2.2.: International EUR-7(1) in million tonnes (2)

Mode	Q3/82	Q3/81	% Change	Modal share
Road	37.6	37.6	0.0	39.5
Rail	12.5	16.0	-21.9	13.1
I.W.	45.1	45.0	+ 0.1	47.4
TOTAL	95.2	98.6	- 3.1	100

(1) EUR-7 refers to Germany, France, Italy, the Netherlands, Denmark and the Belgium/Luxembourg Economic Union.

(2) Because of the strong seasonality of traffic, its evolution is monitored by comparing the results of a quarter with the corresponding quarter of the previous year.

2.2. Modes

2.2.1. Road

EUR-7 statistics for the third quarter of 1982 show no change in comparison with the corresponding quarter of the previous year, with most countries producing slight growth. The exception was the Netherlands with a drop of around one percent. The relation giving the worst figure was Italy/Germany at -8.6%, while Belgium-Luxemburg /Denmark showed the most improvement, +14.3%.

2.2.2. Rail

The third quarter was disastrous for rail traffic. Although complete figures for EUR-7 were not available by publication time, indications were that rail traffic has slumped to its lowest ever share of the market. The Germany/France relation was severely affected in both directions, showing -20.6% and -37.2% respectively. By its nature less flexible in its response to changing market conditions, it appears to be the hardest hit by the Community-wide drop in steel production and the resultant decrease in the demand for coal. Steel production dropped 7% in the first nine months of 1982 compared to the same period of 1981.

2.2.3. Inland Waterways

Figures for the third quarter of 1982 show a marginal increase on those for the corresponding quarter of the previous year. However, this was chiefly due to the 14.5% improvement in the goods moved from the Netherlands to Belgium, to the 6.1% increase in the traffic from Belgium to Germany and, to a lesser extent, Belgium to France (+18%) and France to the Netherlands (+24.9%). The two most important relations in tonnage terms, Netherlands/Germany and Germany/Netherlands, both showed a drop (-3.4% and -5.5% respectively). A total of 45.1 million tonnes was moved between the five countries linked by the inland waterway network.

2.3. Transport activity in 1982 (estimate) and 1983 (forecast)

2.3.1. Total freight transport tonnage between the nine Member States (Greece not included) fell during 1982 by 1.2%. The forecast for 1983 is for a further decline of 0.2% and consequently for the fourth consecutive year there will be a decline in the total tonnage transported by inland transport.

In 1982 the expected upturn did not materialise. The slight upturn in the business-cycle since mid 1981 petered out by June 1982. This relapse into recession has resulted in a decline in total transport activity. Its impact on the demand for the three modes has been different with road transport showing more resilience than either rail or inland waterway.

For 1983 two distinct time periods have been considered: activity will remain weak during the first six months with some recovery possible from mid-year onwards.

Table : Transport demand in 1982 and 1983

	1982	1983
	(estimate)	(forecast)
Road	+2.7%	+2.0%
Rail	-7.8%	-3.4%
Inland Waterway	-2.4%	-1.2%
Total	-1.2%	-0.2%

Source: IFO-Institute-Munich (December 1982)

2.4. United Kingdom, Ireland and Greece

2.4.1. United Kingdom

In the third quarter of 1982 the number of vehicles carried by ro-ro ferries amounted to 174,000, evenly divided between powered vehicles and unaccompanied trailers. This total was only one percent down on the second quarter, with powered vehicles down two percent and unaccompanied trailers showing a one percent rise. There was an 11% increase over the third quarter of 1981 (powered vehicles +5%, unaccompanied trailers +18%.)

2.4.2. Ireland

Refrigerated traffic hit its seasonal peak in the third quarter of 1982, but indications are, that because of a good local fruit harvest and a resultant drop in food imports, this peak was lower than in previous years. Refrigerated fleet operators are generally optimistic about the fourth quarter. The quarter seemed to be good in the mixed refrigerated and dry goods section, and results appeared to be better than the corresponding quarter of 1981. In contrast, dry goods operators appear to have had a bad quarter; the August holiday period, new VAT regulations and the general recession being contributory factors.

2.4.3. Greece

Imports by road for the third quarter of 1982 were nearly 40% higher than the corresponding period of the previous year. All relations, except Belgium, were strongly positive, led by France, at +45% and the Netherlands, +44%. Exports were also up some six percent for the same period.

SECTION 3 : ROAD SURVEYS

This section reports on three surveys :

- the road inquiry survey amongst hauliers noting their opinion on recent trends in international traffic;
- cost indices survey;
- price indices survey;

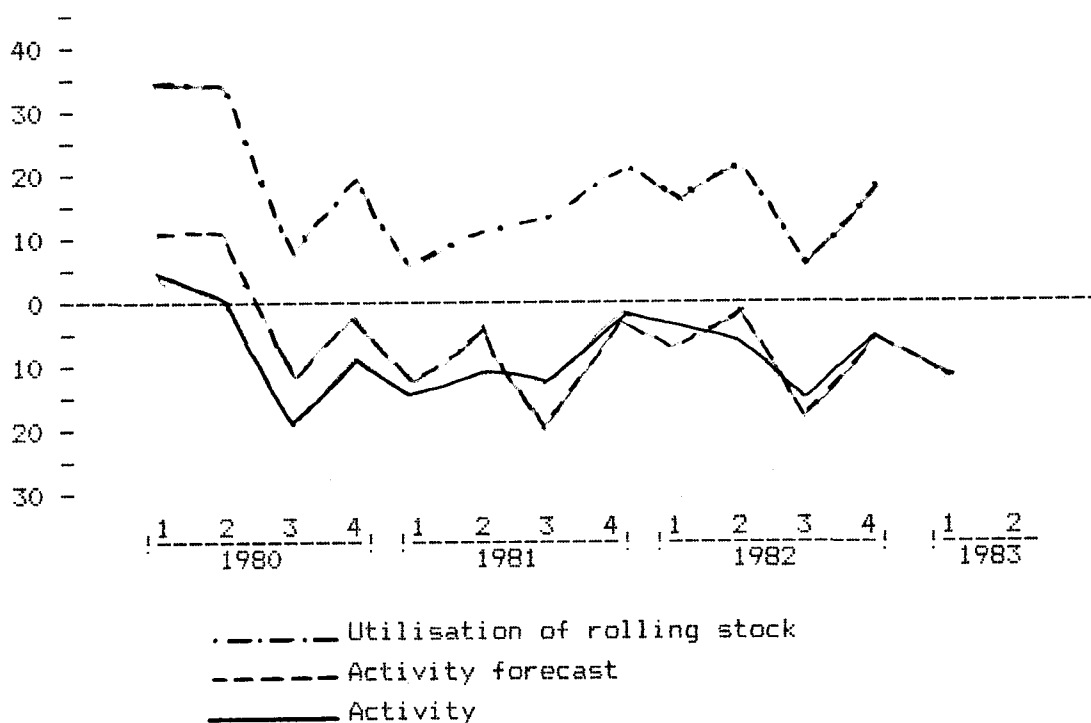
3.1. Road Inquiry Survey

3.1.1. Summary of activity indicators (fig 3.1., Tables 3.1. and 3.2.)

Road transport improves

The inquiry for the fourth quarter 1982 indicates an upturn on the third quarter.

Figure 3.1. Activity Indicator: Global balance of opinion (in percentage)



3.1.2. Activity

For the fourth quarter, the balance of opinion (percentage difference between positive and negative replies) rose by 10 points (from -16% to -6%) in comparison with the previous quarter. This improvement was Community-wide, with the exception of France, which worsened by 3 points.

3.1.3. Forecasts : Seasonal drop

The forecast for the first quarter of 1983 seems a little pessimistic, but an examination of previous years reveals it to be a seasonal fall. The balance of opinion is -12% (six points worse than the fourth quarter of 1982).

In total, 26% of the hauliers questioned expect a drop in their level of activity, but a more detailed look shows significant variations between various countries. While only 9% of danish hauliers foresee a drop in activity, this figure rises sharply to 33% for France and Ireland, and to 55% for Greece.

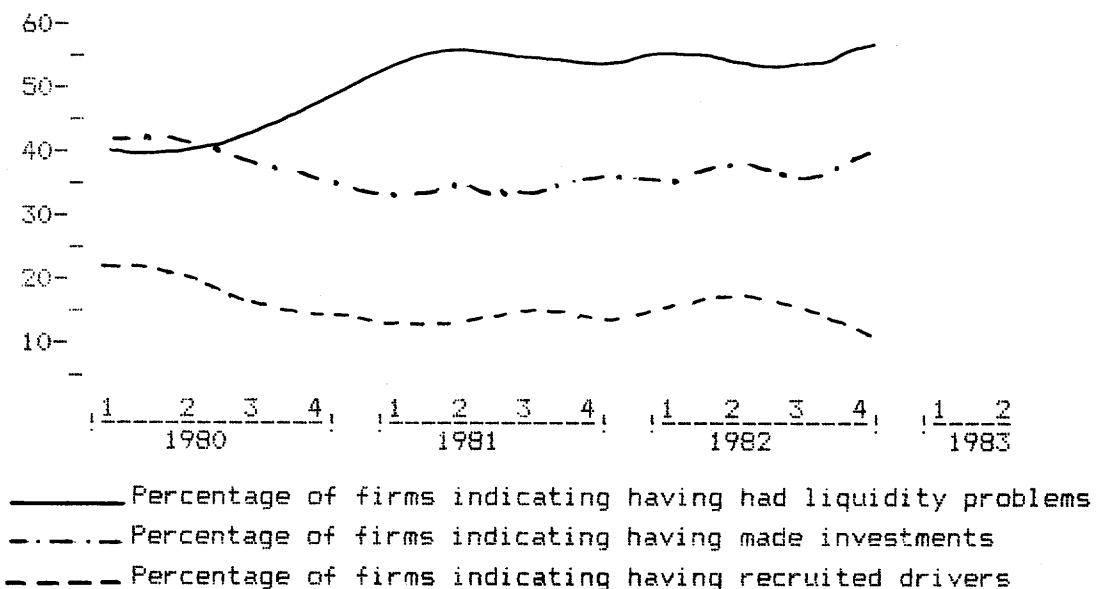
3.1.4. Utilisation of rolling stock

The percentage of firms who consider that their rolling stock is under-utilised has decreased measurably: down to 19% in the fourth quarter, against 26% in the third. Additionally, 35% of hauliers have reported good or very good utilisation, which represents a four point improvement on the third quarter.

The balance of replies rose from +5% in the third quarter to +16% in the fourth.

3.1.5. Summary of economic indicators (fig 3.2. Tables 3.3., 3.4., 3.5.)

Figure 3.2. Economic Indicators



		1980				1981				1982				1983				1984				
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	
BELGIQUE-BELGIE	+	29	27	19	25	25	28	22	31	28	31	23	30									
	=	48	50	39	47	46	41	43	44	48	51	43	47									
	-	23	23	42	28	29	31	35	25	24	18	34	23									
	\$	+6	+4	-23	-3	-4	-3	-13	+6	+4	+13	-11	+7									
DANMARK	+	34	27	19	26	24	20	21	24	26	26	17	27									
	=	58	57	53	57	57	65	61	60	64	64	61	63									
	-	8	16	28	17	19	15	18	16	10	10	22	10									
	\$	+26	+11	-9	+9	+5	+5	+3	+8	+16	+16	-5	+17									
DEUTSCHLAND	+	20	18	15	16	20	18	19	20	22	19	18	24									
	=	56	54	45	51	46	54	48	49	49	55	44	43									
	-	24	28	40	33	34	28	33	31	29	26	38	33									
	\$	-4	-10	-25	-17	-14	-10	-14	-11	-7	-7	-20	-9									
FRANCE	+	29	22	18	14	16	14	16	22	17	14	13	14									
	=	49	51	50	49	41	48	48	46	48	50	51	44									
	-	22	27	32	37	43	38	36	32	35	36	36	42									
	\$	+7	-5	-14	-23	-27	-24	-20	-10	-18	-22	-23	-28									
EAAAA	+								27	16	14	17	28									
	=								47	45	31	33	35									
	-								26	39	55	50	37									
	\$								+1	-23	-41	-33	-9									
IRELAND	+			42	25	18	24	21	25	21	27	21	28									
	=			34	47	29	47	40	40	48	39	37	37									
	-			24	28	53	29	39	35	31	34	42	35									
	\$			+18	-3	-34	-5	-18	-10	-10	-7	-21	-7									
ITALIA	+	20	25	16	14	15	15	17	18	15	16	14	15									
	=	53	45	44	41	41	44	43	53	49	47	41	51									
	-	27	30	40	45	44	41	40	29	36	37	45	34									
	\$	-7	-5	-24	-31	-29	-26	-23	-11	-21	-21	-31	-19									
LUXEMBOURG	+	23	21	13	26	25	26	12	25	28	26	21	23									
	=	61	66	44	44	46	51	51	62	48	50	51	48									
	-	16	13	43	30	29	23	37	13	24	24	28	29									
	\$	+7	+8	-30	-4	-4	+3	-25	+12	+4	+2	-7	-6									
NEDERLAND	+	31	23	13	34	30	20	25	24	34	32	26	31									
	=	39	55	44	45	41	65	49	52	43	45	41	49									
	-	30	22	43	21	29	15	26	22	23	23	33	20									
	\$	+1	+1	-30	+13	+1	+5	-1	+4	+11	+9	-7	+11									
UNITED KINGDOM	+				29	23	21	24	28	28	25	21	24									
	=				45	49	53	56	59	60	56	63	64									
	-				26	28	26	20	13	12	19	16	12									
	\$				+3	-5	-5	+4	+15	+16	+6	+5	+12									
EEC	+	26	23	17	21	20	19	20	24	22	21	19	23									
	=	51	52	45	48	44	50	47	50	50	50	46	48									
	-	23	25	38	31	36	31	33	26	28	29	35	29									
	\$	+3	-2	-21	-10	-16	-12	-13	-2	-6	-8	-16	-6									

Forecast

Key :

- + : Percentage of firms indicating an increase in traffic
- = : Percentage of firms indicating traffic stable
- : Percentage of firms indicating a decrease in traffic
- \$: Balance (difference between + and -)

Table 3.2

UTILIZATION OF ROLLING STOCK

- + : Percentage of firms indicating a very good and/or good utilization
 = : Percentage of firms indicating a normal utilization
 - : Percentage of firms indicating a bad utilization

		1980				1981				1982				1983				1984				
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	
BELGIQUE-BELGIE	+	51	52	31	32	28	33	31	40	41	55	39	45									
	=	36	37	41	47	48	46	51	46	43	35	43	41									
	-	13	11	28	21	24	21	18	14	16	10	18	14									
DANMARK	+	64	55	33	49	42	40	41	46	49	48	43	54									
	=	33	39	50	43	45	49	47	41	43	46	45	41									
	-	3	6	17	8	13	11	12	13	8	6	12	5									
DEUTSCHLAND	+	39	33	27	30	25	28	21	30	33	28	20	19									
	=	45	53	47	52	51	53	53	46	49	51	51	54									
	-	16	14	26	18	24	19	26	24	18	21	29	27									
FRANCE	+	28	49	35	43	36	37	44	46	29	43	27	30									
	=	54	29	34	23	20	26	25	25	34	23	40	41									
	-	18	22	31	34	44	37	31	29	37	34	33	29									
ΕΛΛΑΔΑ	+								23	18	15	8	27									
	=								56	53	28	31	39									
	-								21	29	57	61	34									
IRELAND	+			57	63	28	30	31	36	34	30	30	47									
	=			33	22	40	40	38	35	37	40	47	40									
	-			10	15	32	30	31	29	29	30	23	13									
ITALIA	+	27	27	22	20	14	14	18	17	15	14	17	12									
	=	55	52	56	47	48	55	59	62	64	63	51	64									
	-	18	21	22	33	38	31	23	21	21	23	32	24									
LUXEMBOURG	+	59	58	45	40	28	37	28	28	18	22	14	37									
	=	39	36	45	58	58	56	58	65	75	67	72	50									
	-	2	6	10	2	14	7	14	7	7	11	14	13									
NEDERLAND	+	59	57	30	44	49	46	47	52	51	60	38	41									
	=	34	38	39	37	32	42	36	38	37	35	40	45									
	-	7	5	31	19	19	12	17	10	12	5	22	14									
UNITED KINGDOM	+				49	43	44	48	68	65	62	58	68									
	=				28	32	35	37	25	26	22	23	25									
	-				23	25	21	15	7	9	16	19	7									
EEC	+	44	45	31	39	32	33	34	39	36	40	31	35									
	=	44	42	44	40	40	44	44	41	43	40	43	46									
	-	12	13	25	21	28	23	22	20	21	20	26	19									

Table 3.3

RECRUITMENT OF DRIVERS

Percentage of firms indicating having recruited drivers

	1980				1981				1982				1983				1984				
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	
BELGIQUE-BELGIE	26	19	12	17	17	18	19	10	21	26	19	15									
DANMARK	21	19	14	13	12	8	17	7	14	20	6	11									
DEUTSCHLAND	13	7	5	3	5	3	4	2	5	5	3	2									
FRANCE	8	6	4	3	4	3	4	4	5	3	4	4									
ΕΛΛΑΔΑ								40	36	24	25	20									
IRELAND			14	19	24	12	12	24	17	15	10	19									
ITALIA	32	32	27	26	22	29	28	22	21	24	18	16									
LUXEMBOURG	50	42	34	21	35	30	14	27	21	31	28	27									
NEDERLAND	36	32	16	19	15	19	14	11	18	19	19	8									
UNITED KINGDOM				17	12	10	19	25	21	19	20	21									
EEC	21	19	13	13	12	12	14	11	14	15	12	10									

Table 3.4

L I Q U I D I T Y P R O B L E M S

Percentage of firms indicating having had liquidity problems

	1980				1981				1982				1983				1984			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
BELGIQUE-BELGIE	26	25	27	29	27	39	28	32	32	27	26	31								
DANMARK	14	14	24	19	26	23	31	29	32	23	32	18								
DEUTSCHLAND	29	29	32	34	43	44	39	42	40	39	40	38								
FRANCE	52	54	53	61	67	66	64	61	64	60	60	57								
ΕΑΑΑΑΑ								63	54	76	79	69								
IRELAND			57	62	79	59	53	51	58	58	50	59								
ITALIA	49	57	53	64	65	72	70	70	72	76	69	70								
LUXEMBOURG	26	20	34	21	63	15	43	27	57	38	40	42								
NEDERLAND	20	16	23	17	19	16	18	15	18	12	11	10								
UNITED KINGDOM				58	64	57	57	51	56	49	53	50								
EEC	39	39	41	46	53	53	51	50	53	49	49	45								

Table 3.5

I N V E S T M E N T S

Percentage of firms indicating having made investments

	1980				1981				1982				1983				1984			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
BELGIQUE-BELGIE	39	38	35	34	30	36	30	29	30	39	32	38								
DANMARK	57	49	43	32	35	39	44	40	43	45	35	42								
DEUTSCHLAND	42	45	35	34	32	28	32	30	27	35	30	34								
FRANCE	39	39	35	30	31	30	27	34	34	35	31	42								
ΕΑΑΑΑΑ								46	33	42	24	29								
IRELAND			38	46	28	27	30	29	25	22	27	19								
ITALIA	33	39	35	34	26	29	26	27	26	25	21	20								
LUXEMBOURG	50	42	32	26	17	22	21	33	26	29	28	47								
NEDERLAND	52	41	41	40	38	44	36	47	46	42	43	46								
UNITED KINGDOM				57	30	52	50	49	53	63	61	67								
EEC	41	41	36	34	31	33	31	34	33	36	32	38								

3.1.6. Recruitment: the decline continues

The percentage of firms having recruited drivers continues to fall and now amounts to only 10%.

Because of this, conditions on the employment market remained more or less identical to previous quarters. The number of hauliers who considered recruitment to be normal or easy represented 79% of the total, but it should be noted that belgian and greek hauliers are finding recruitment more difficult.

3.1.7. Cash flow problems: slight improvement

The number of firms experiencing cash flow problems has fallen to its lowest level since 1981 (45%), but the italian, greek and french hauliers are still having a lot of problems.

3.1.8. Investment: upturn

There has been a considerable improvement in this area. The number of companies who invested during the fourth quarter pushed the total six points higher than the previous quarter, to 38%.

3.1.9. Planned investments: optimism

The number of firms intending to invest rose by 7 points on the previous quarter: 30% against 23%. The percentage of hauliers replying positively was an improvement in all member countries without exception. It should be noted, however, that these investments were principally for replacement rather than expansion.

3.2. Cost Indices

3.2.1. Coverage

Six-monthly surveys are now being conducted on costs in Germany, France, the Netherlands, Belgium/Luxemburg, UK and Denmark. Results have not yet been received from Italy, Ireland or Greece. UK results have been received, but as yet, not the cost structures. The Germans and the Dutch surveys give a breakdown of the cost factors by geographical relations. In the near future, it is expected that Belgium and French surveys will also give this breakdown.

3.2.2. Methodology

Indices for fuel are shown separately (tables 3.6 and 3.7; and figure 3.3.), as allowance is made for the differences in cost of fuel estimated to be bought in each Member State. The indices for the other cost factors are based on the costs in the country of the hauliers. 1st January 1982 is used as the base point, and the indices are expressed in national currency and in ECU.

3.2.3. Summary Results 1.1.78-1.1.82

The overall increase, excluding cost of fuel, for the period 1.1.78-1.1.82 is small. In the case of fuel, this period saw large and dramatic increases - due to the increase of petroleum prices by the producers.

Comparisons made in table 3.8. and 3.9; figures 3.4. and 3.5., only refer to fuel and total cost changes over the period 78-81. A more detailed analysis will be given in the annual report.

3.2.4. Overall costs developments: First half of 1982

For the first half of 1982, costs rose for hauliers in all Member States in both national currency and ECU except for Belgium. In national currency, the countries with low inflation (i.e. below 7% for the year), show a small increase except in Denmark, while for countries with inflation over 7%, France and Belgium/Luxembourg, increases in costs are higher. When expressed in ECU, we see the reverse, that weak currency countries have small increases, and strong currency countries big increases.

Fuel cost developments: First half of 1982

For the first half of 1982, costs increased in countries with weak currencies, while these with strong currencies show small drops. As the international price of fuel is expressed in U.S. dollars, such increases and decreases are to be expected. When these figures are expressed in ECU there is a small increase, except in Belgium and Denmark due to the devaluation in this period.

Table 3.6.

FUEL COST IN NATIONAL CURRENCY

		1.1.78	1.1.79	1.1.80	1.1.81	1.7.81	1.1.82	1.7.82
*Germany	(DM)	57.6	57.5	74.1	86.5	93.6	100.0	96.8
France	(FF)	46.9	53.1	66.5	86.2	95.1	100.0	108.2
*Netherlands	(HFL)	55.4	57.0	77.0	86.2	94.4	100.0	99.0
Belgium	(BFR)	45.5	47.7	66.9	78.9	90.0	100.0	102.2
Luxemburg								
U.K.	(LUK)	49.8	49.8	70.7	82.6	102.4	100.0	102.4
Denmark	(DKR)				78.1	95.8	100.0	100.0

Table 3.7.

FUEL COST IN ECU

*Germany		54.3	56.0	72.7	81.9	90.7	100.0	100.2
France		50.3	57.2	70.9	89.8	98.6	100.0	102.3
*Netherlands		53.4	56.3	75.1	82.3	90.1	100.0	101.7
Belgium		47.1	50.1	68.9	79.1	90.7	100.0	94.4
Luxemburg								
U.K.		44.4	41.5	62.7	87.4	105.0	100.0	104.8
Denmark					78.5	98.6	100.0	97.7

Table 3.8.

COST INDICES IN NATIONAL CURRENCY

		1.1.78	1.1.79	1.1.80	1.1.81	1.7.81	1.1.82	1.7.82
*Germany	(DM)	75.8	79.6	86.3	94.6	98.8	100.0	102.3
France	(FF)	56.9	64.5	73.0	86.3	94.8	100.0	108.5
*Netherlands	(HFL)	75.2	77.9	86.6	92.5	96.4	100.0	101.1
Belgium	(BFR)	67.7	71.6	79.6	88.8	93.6	100.0	105.6
Luxemburg								
U.K.	(LUK)							
Denmark	(DKR)				88.3	95.1	100.0	102.5

Table 3.9.

COST INDICES IN ECU

*Germany		71.4	77.5	84.7	89.6	95.8	100.0	105.9
France		61.2	69.5	77.8	89.8	98.2	100.0	102.6
*Netherlands		72.4	77.1	84.5	88.3	92.1	100.0	103.8
Belgium		70.0	75.2	82.0	89.1	94.3	100.0	97.5
Luxemburg								
U.K.								
Denmark					88.8	96.1	100.0	100.1

*weighted average

FIGURE 3.3.

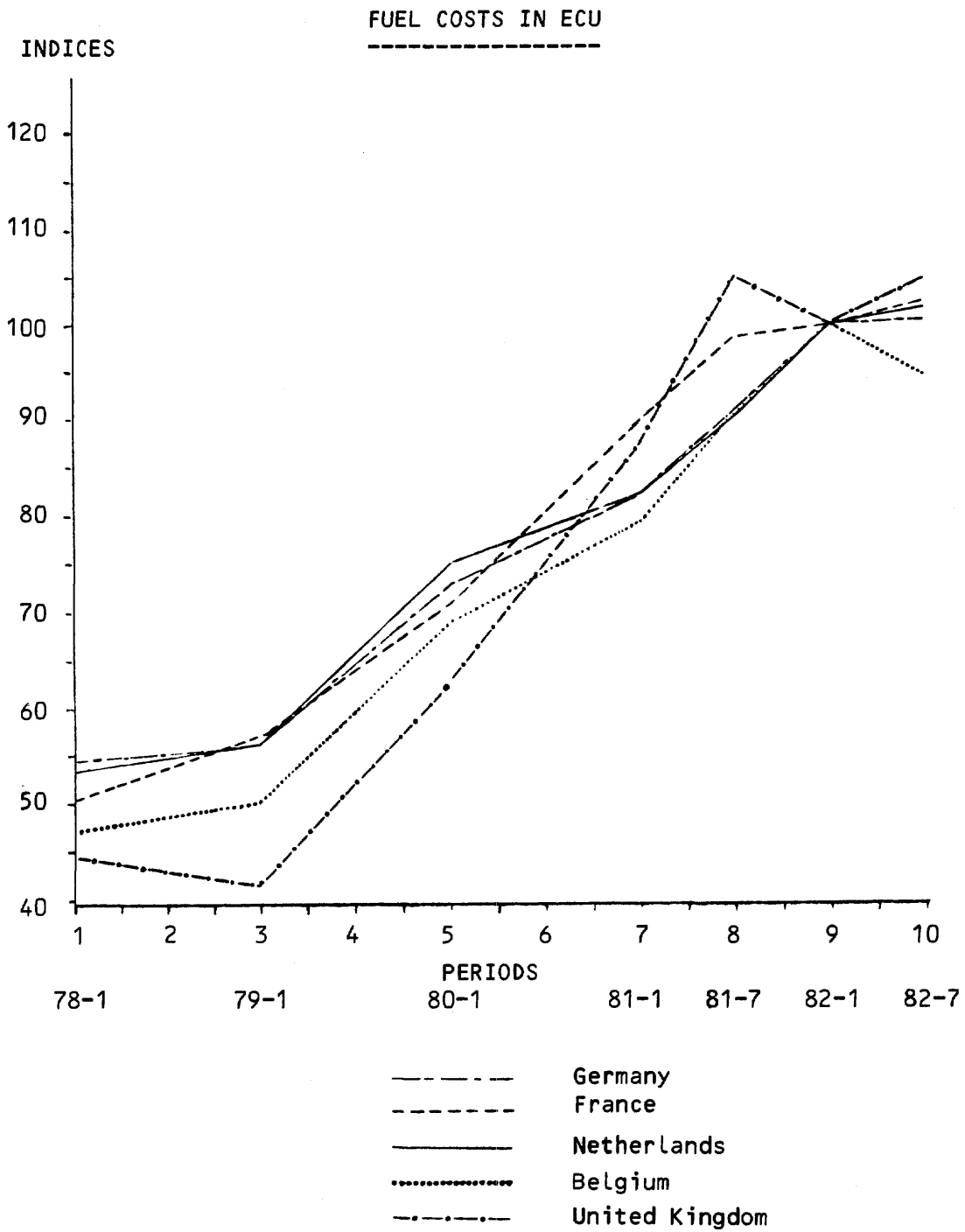


FIGURE 3.4.

TOTAL COSTS IN NATIONAL CURRENCY

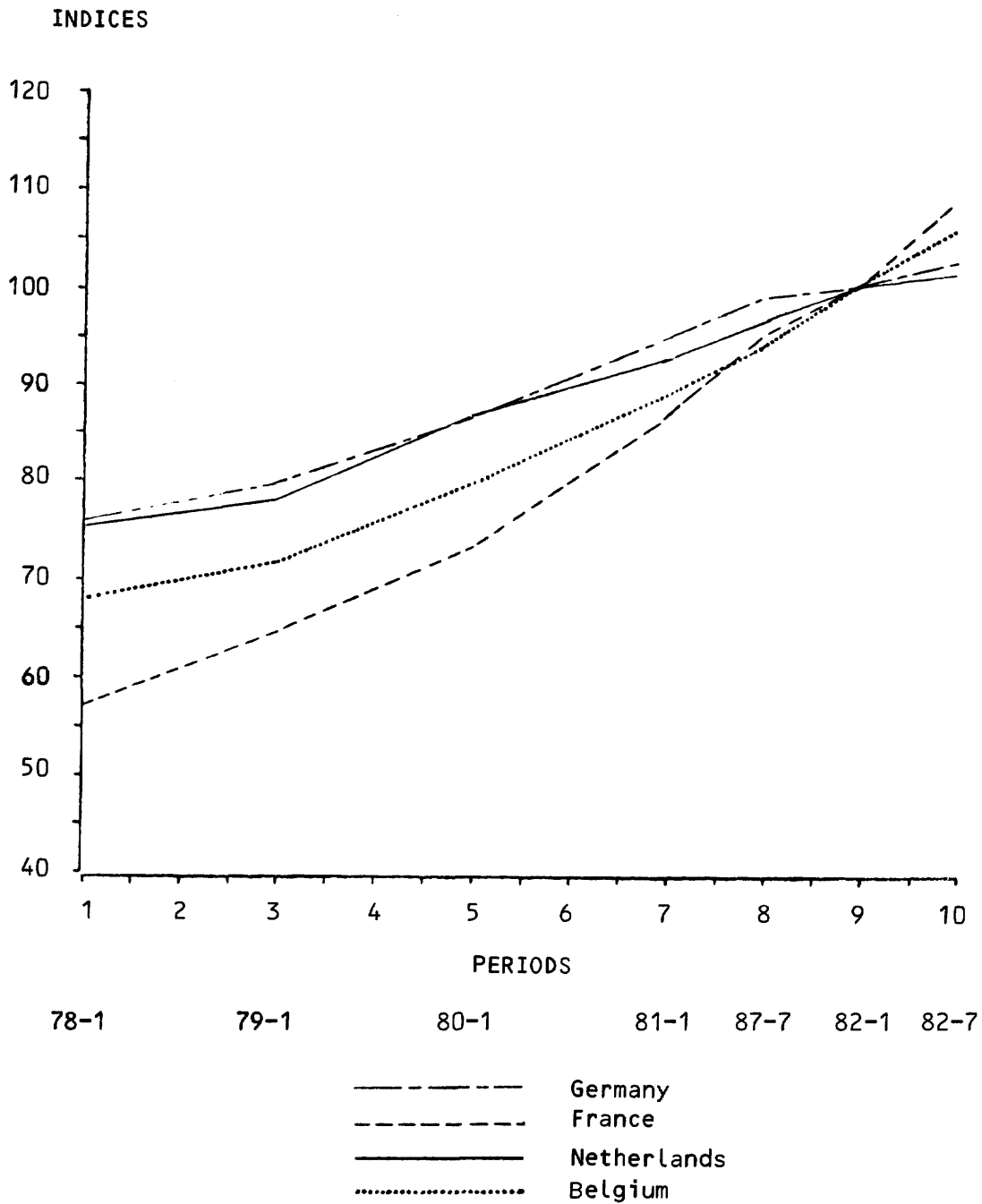
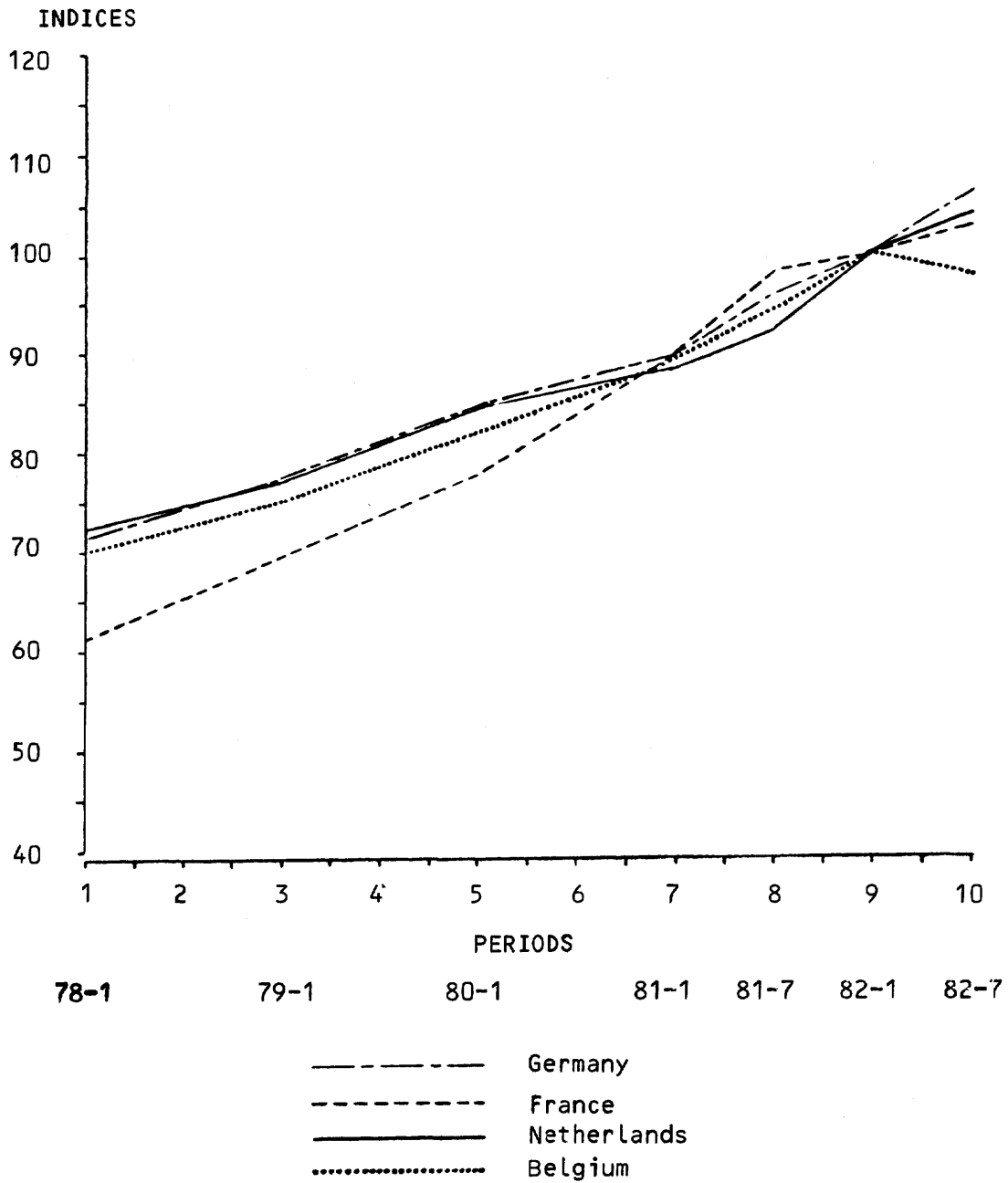


FIGURE 3.5.

TOTAL COSTS IN ECU



3.3. Price Surveys

3.3.1. Coverage

Price surveys are now being carried out in Germany, France, Italy, the Netherlands, Belgium and Luxemburg. The analysis relates to movements between these Member States up to the third quarter of 1982. The relationships of Netherlands to Belgium/Luxemburg, and France to all Member States are only up to the first quarter of 1982. Due to changes in survey methodology, the French results for the second and third quarters of 1982 have been delayed.

3.3.2. Methodology

The base point for the price indices results have been moved to the first quarter of 1982; this facilitates the analysis as certain series either started or changed methodology late 1981 or beginning of 1982. In the calculations, the weighting factors have been changed, instead of tonnes, tonne-kilometres are being used. The figures used relate to 1980, being the latest figures available from Eurostat "Community Survey on the carriage of goods by Road". Volume 3 (figures for Italy have been estimated).

The analysis of german haulier data now takes specific account of traffic mix changes, whereas the data previously used, which was taken from BAG publications could not take traffic mix changes into account. The old Belgium series based on inspectors' records has been dropped. Care must be taken in comparing the french results before the end of 1981, because of the change of series.

3.3.3. Overall results by nationality of haulier

Average prices (measured in national currencies) continued to improve slightly in the third quarter of 1982 except for italian hauliers where a decline took prices back to the level of the first quarter of 1982. The average prices (in ECU) received by german and dutch hauliers show very small increases of less than 1% while belgian hauliers show a small increase of 1.5%, the decline for italian hauliers was 2%. (figure 3.6.)

3.3.4. Price developments by relation

Figure 3.7. shows the development of the average prices (in ECU) of german, french, dutch and Belgium/Luxemburg hauliers on the relations between these Member States. While Figure 3.8. shows similar average prices of italian hauliers and partner country.

Dutch hauliers

Average prices on all relations show positive changes (in ECU) in the third quarter of 1982. The sharp increase in the relation with France and Italy at the end of 1981 petered out at the beginning of 1982 but has since increased again. In the relation with Germany, the increases have been steady at about 2% per quarter since the first quarter of 1981. Since the first quarter of 1982, average prices have increased by about 3%-4% on relations with Germany, France and Italy. (Note that Dutch hauliers data on the relation with Belgium/Luxemburg have not been analysed since the first quarter of 1982, due to delays with the data.)

Italian hauliers

Average prices (in ECU) on relations with Germany and France have fallen in the third quarter of 1982 by about 2% while those with Belgium increased by about 2%. The decrease in the relation with the Netherlands is large (over 10%), but this fall followed a very large increase in the previous quarter (over 15%). Although there has been considerable oscillation in the Italian results, average prices have increased by between 1% and 4% on different relations since third quarter of 1981.

Belgium/Luxemburg hauliers

Average prices (in ECU) on relations with France and the Netherlands have increased by about 2%. In the relation with Italy, average prices have increased by 10%. With Germany there is a further drop of 4% making 10% since the 1st quarter of 1982; as German prices rose slightly during this period, the Belgium/Luxemburg hauliers gained a considerable competitive advantage following the devaluation of the Belgium and Luxemburg franc.

German hauliers

Average prices (in ECU) on all relations have marginally increased by just over 1% making increases of 3% to 5% on all relations since the 1st quarter of 1982. These increases are essentially due to the strength of the Deutschmark since prices in this currency have been almost unchanged since the first quarter of 1982.

French hauliers

With the new surveys starting from the first quarter of 1982, the comparison of results with earlier surveys requires caution and further investigation is required to see whether the old and new series can be linked. Additionally, since only the results of the first new survey are currently available, no comments can yet be made on the results of the French hauliers.

Figure 3.6: EFFECTS OF CHANGES IN EXCHANGE RATES

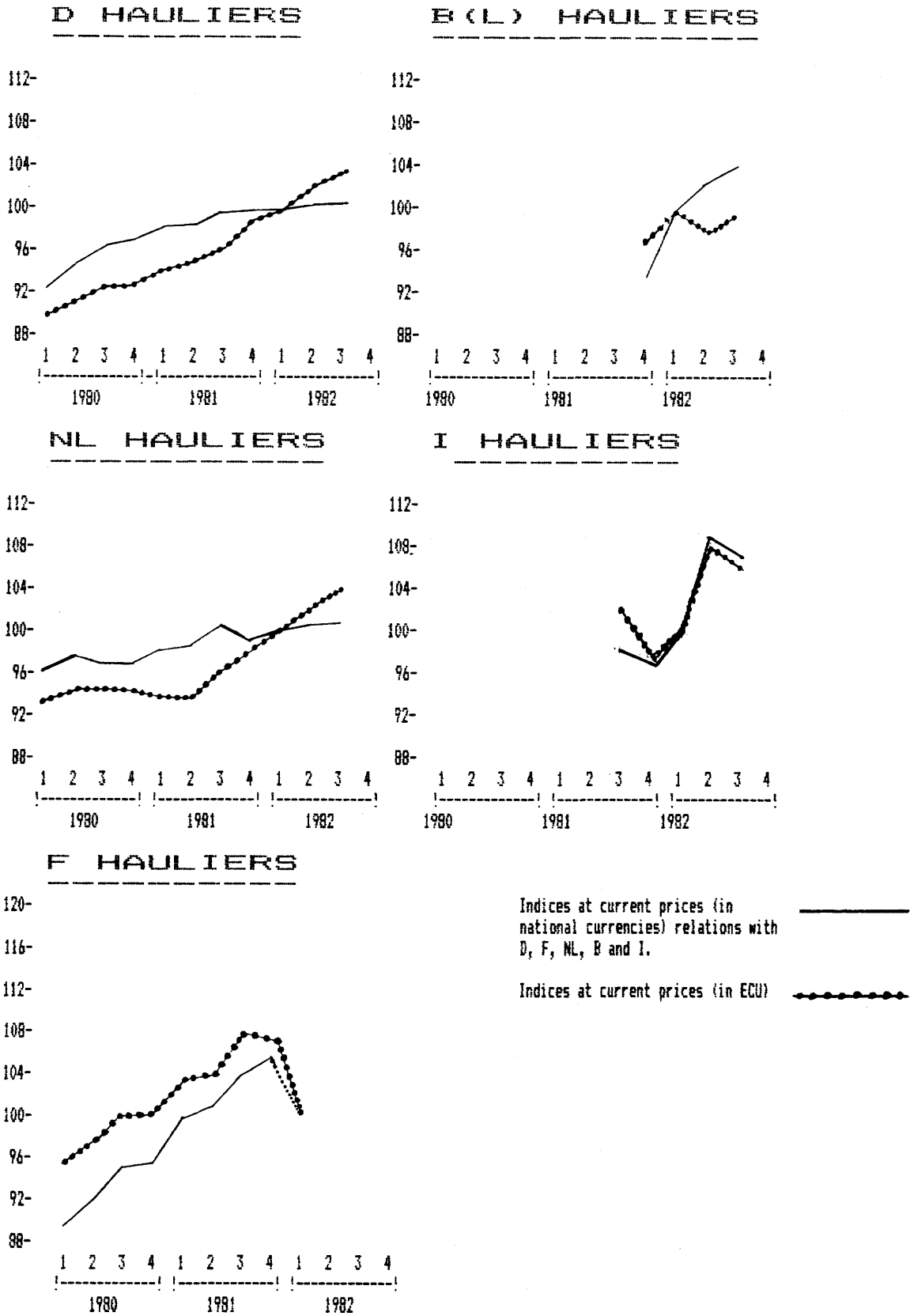


Figure 3.7: PRICE DEVELOPMENT IN RELATIONS BETWEEN D, F, NL AND B

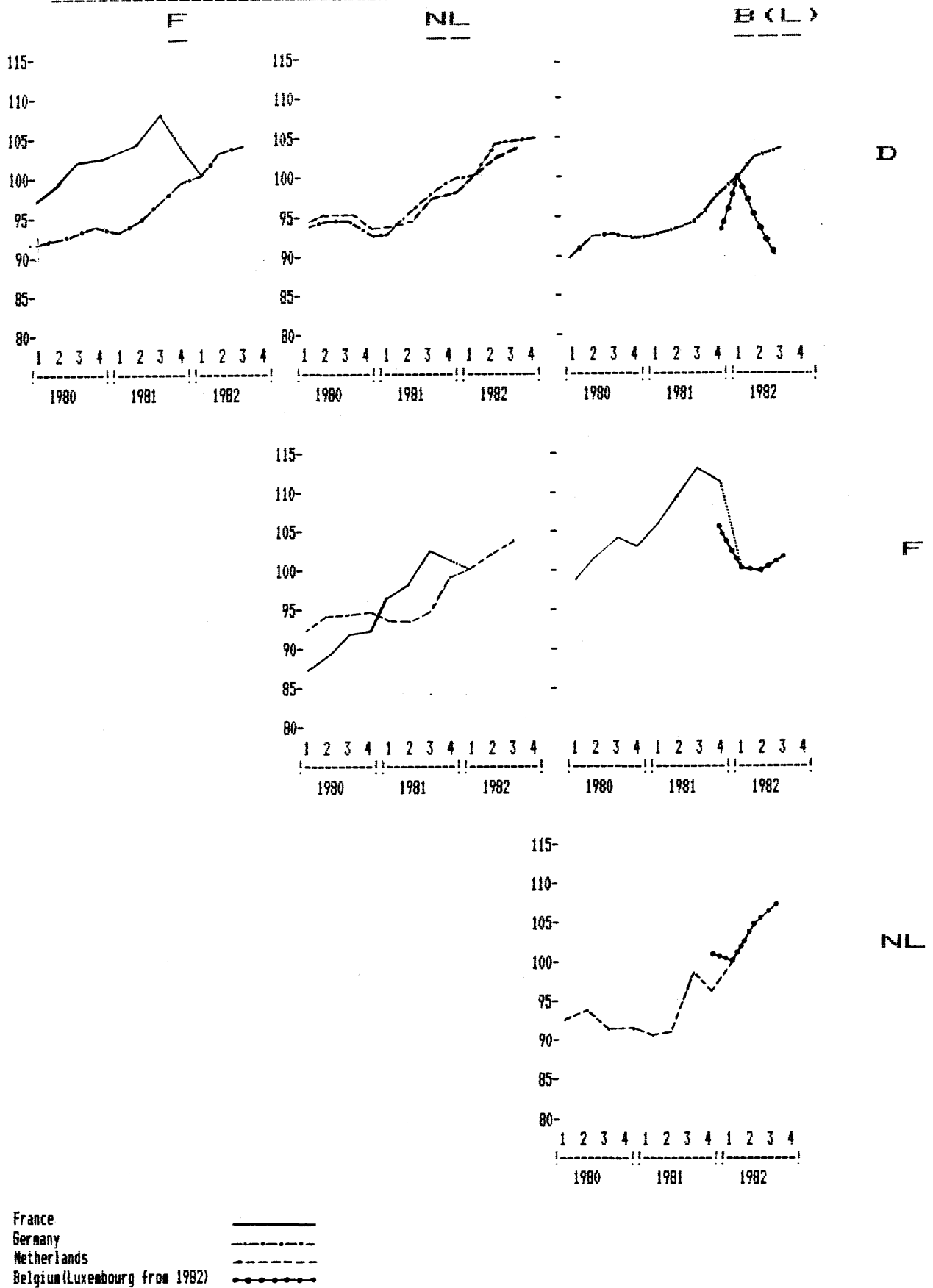
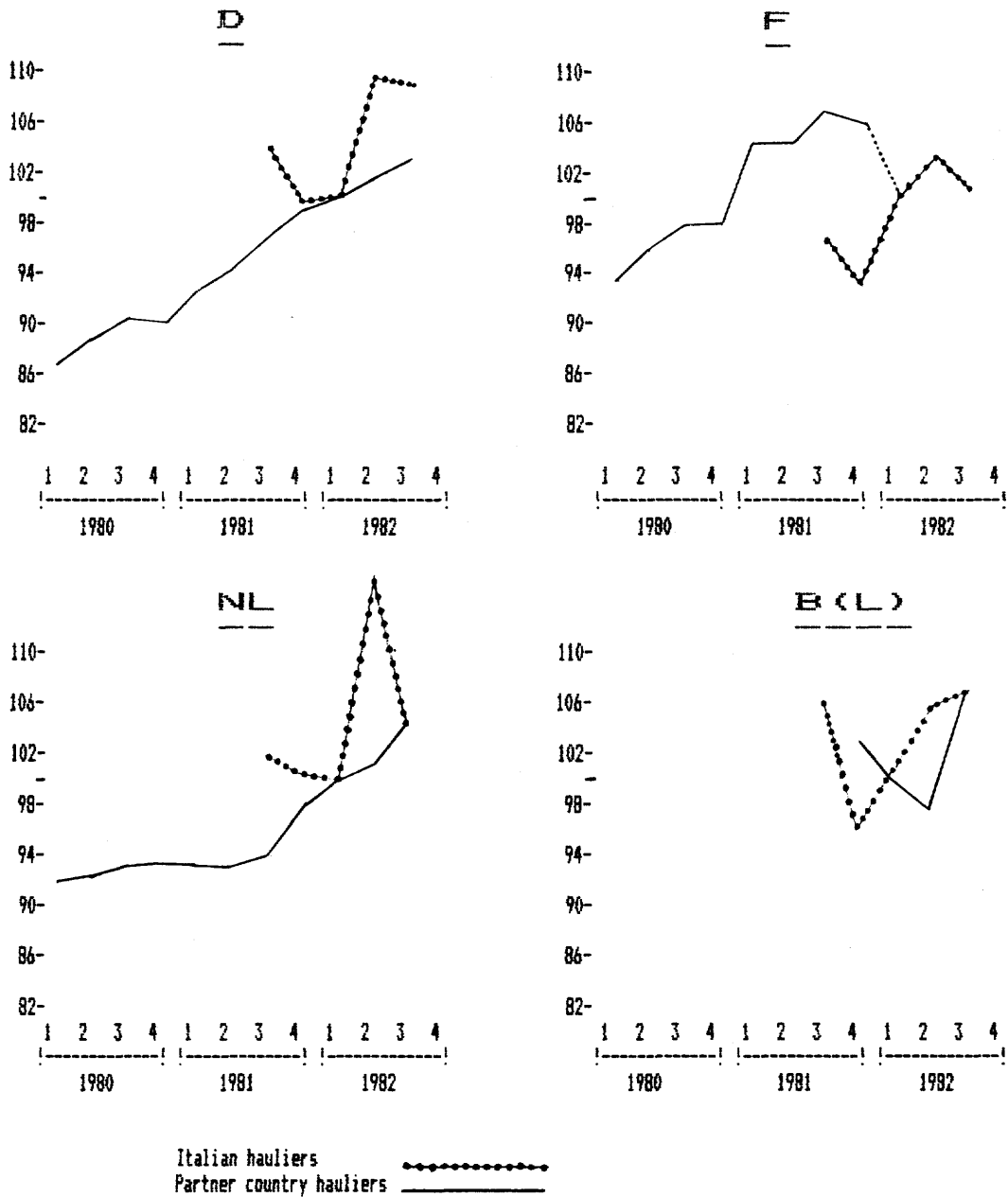


Figure 3.8: PRICE DEVELOPMENT IN RELATIONS WITH ITALY



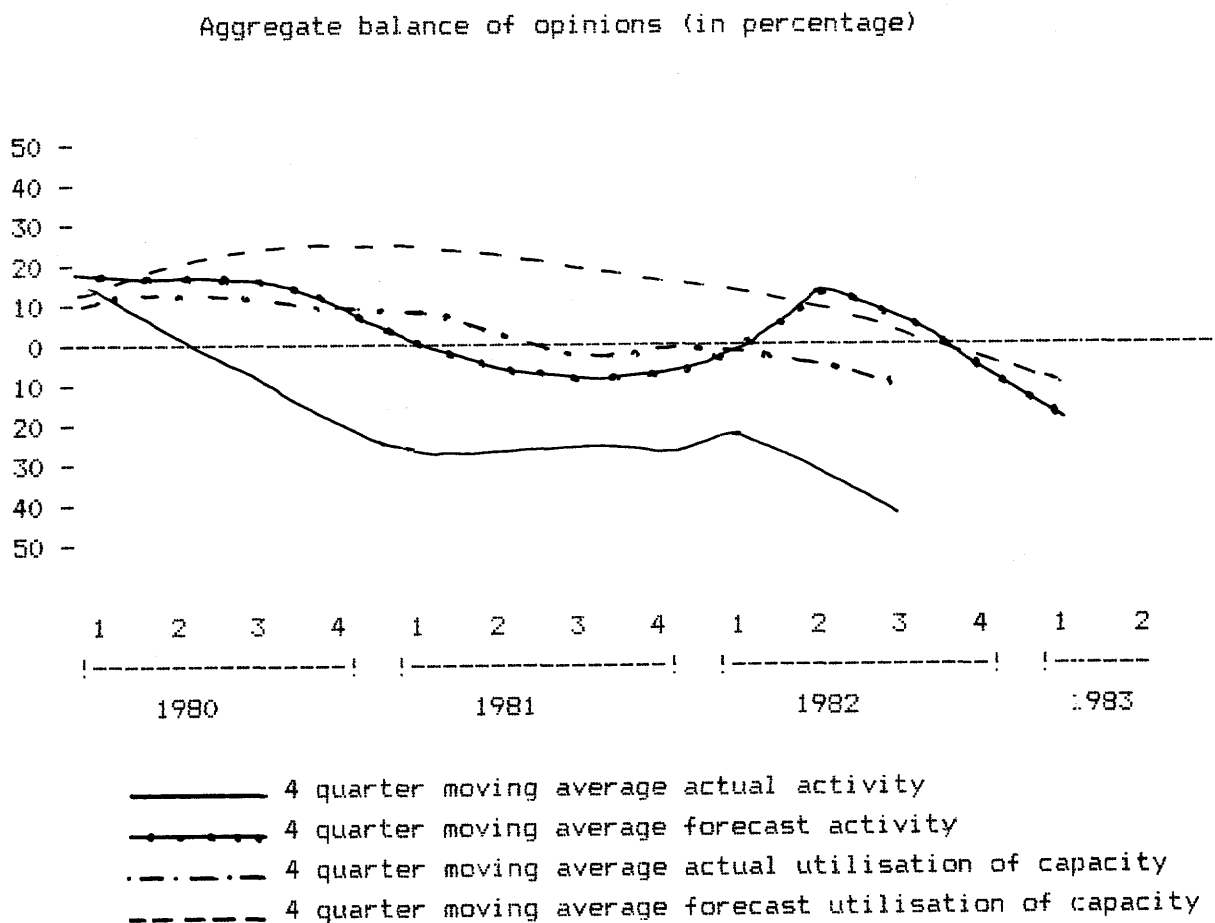
SECTION 4 : WATERWAY SURVEYS

4.1. Rhine traffic

4.1.1. Activity

In the opinion of shippers surveyed the level of activity for the third quarter 1982 is considerably worse than that of the third quarter 1981. Consequently, the moving average (calculated on the balance of opinion for the last four quarters) shows a regression in activity in comparison with the previous quarter. (fig 4.1.)

Figure 4.1. Rhine: Indicators of activity and Utilisation of capacity (moving averages)



After the usual slowing down during the summer holidays, the activity recovered only slightly in September. However, as indicated above, the tendency continued to be downward in the third quarter of 1982. The decline in the upstream activity produced a lack of capacity for down stream transports in the third quarter of 1982. The downwards trend in the actual utilisation of capacity which began in the fourth quarter of 1981, continued.

4.1.2. Forecasts

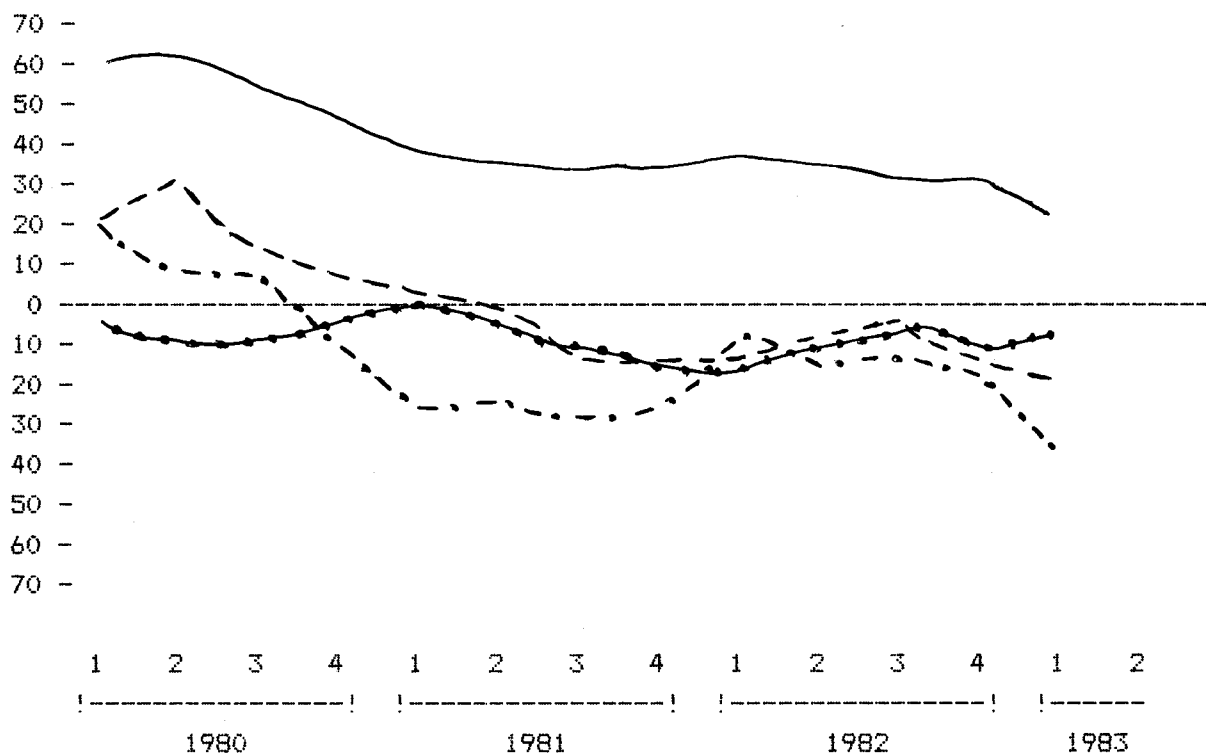
The expected fall in the level of activity in the fourth quarter of 1982 and continued fall in the first quarter of 1983 (see Figure 4.1., moving average forecast) indicate a deepening recession.

Forecasts on the utilisation of total capacity on the Rhine for the first quarter of 1983 show a continuation of the drop. The forecasts of the utilisation of total capacity for the fourth quarter of 1982 and the first quarter of 1983 are considerably regressing when compared to the same quarters of 1981 and 1982.

Figure 4.2. Rhine: Indicators of forecast for 4 important NST-groups

(moving averages)

Aggregate balance of opinions (in percentage)



4 quarter moving average forecast activity

- coal etc. (NST 2)
- sand/gravel etc. (NST 6)
- - - - oil etc. (NST 3)
- ore etc. (NST 4)

The moving average forecasts for the transport of different goods categories (Figure 4.2.) show that, in the opinion of the shippers questioned, there is a downward tendency for solid mineral fuels,

ores and petroleum products for the fourth quarter of 1982 and the first quarter of 1983. After an expected downturn in the fourth quarter of 1982 for construction materials the situation is expected to improve slightly in the first quarter of 1983 probably following the fall of interest rates. According to the specialised press the expectations in all these sectors in the near future are not buoyant but some recovery in the first quarter of 1983 could be expected with exception of ores.

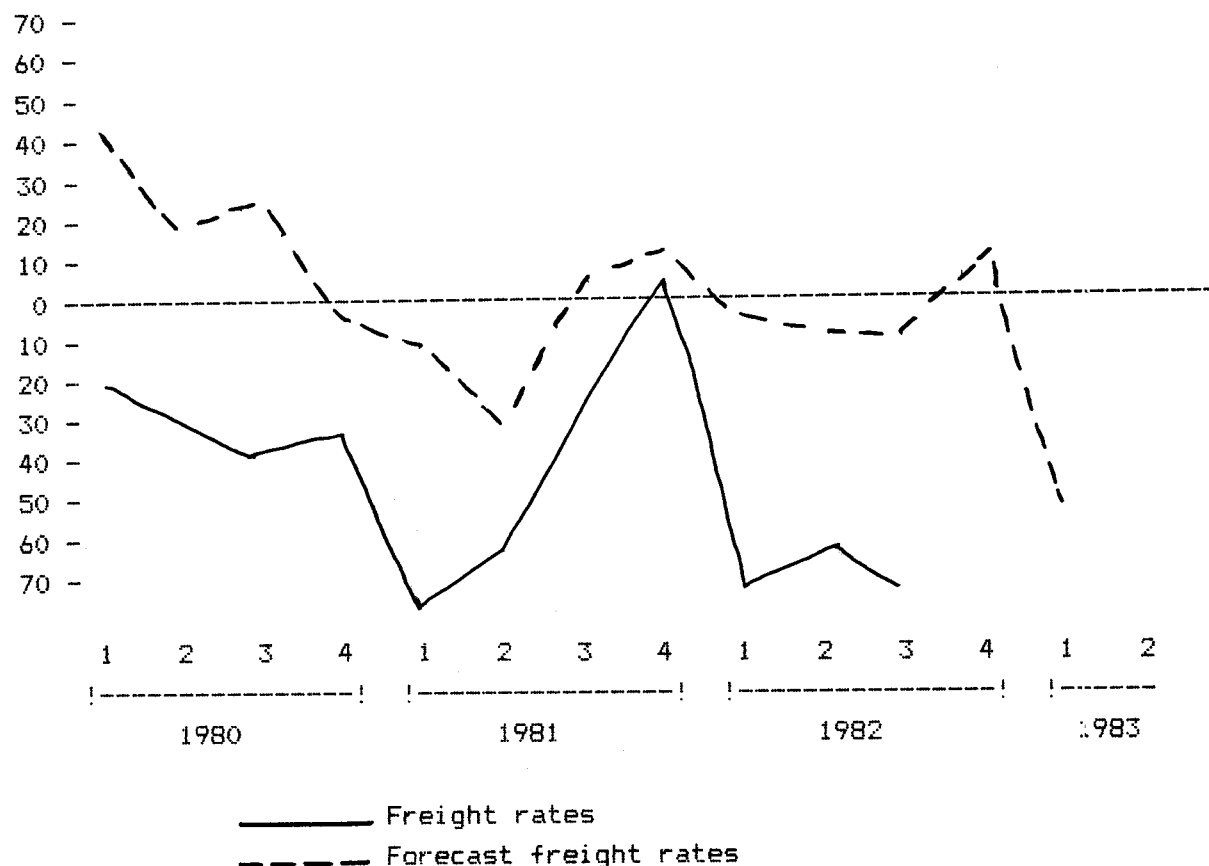
4.1.3. Freight rates

After an improvement in rates in the second quarter of 1982, shippers feel that there has been a fall in quarter three, where rates were considerably lower than in the same quarter of 1981.

Although an important drop in traffic is forecast for the last quarter of 1982 and the first quarter of 1983, it is expected that rates will improve in quarter four and go down in the first quarter of 1983. This contrasts as far as the fourth quarter of 1982 is concerned with the specialised press which reports very low rates on the Rhine.

Figure 4.3. Rhine: developments in freight rates

Aggregate balance of opinions (in percentage)



4.2. North-South traffic

4.2.1. The inquiry survey of activity for the fourth quarter of 1982 amongst Belgian and Dutch waterway transporters shows that activity is slightly up against the third quarter, but less than the normal seasonal adjustment and substantially down against the fourth quarter of 1981.

The balance of opinion during 1982 is:

1982				
	Q1	Q2	Q3	Q4
	-57	-28	-67	-43

Tables 4.1. and 4.2. show the changes in the balance of opinion of waterway transporters between the third and fourth quarters for (a) the bilateral relations and (b) the different tonnage classes.

Table 4.1. : Changes in activity assessment Q4 over Q3 by bilateral relation.

From	To	B	F	NL	
B		++	--	+	legend for tables 4.1. and 4.2. negative: over 7% -- 2 - 7% - no change: = positive: 2 - 7% + over 7% ++
F		++		--	
NL		+	++	=	

Table 4.2. : Changes in activity assessment Q4 over Q3 by tonnage class.

Tonnage class	Belgian shippers	Dutch shippers	Total
200-450	++	++	++
451-750	++	++	++
751-1150	++	++	++
1151-1500	--	=	-
1501	++	=	+

The positive signs shown in Tables 4.2. and 4.3. merely reflect a relative improvement in a continuing depressed market. The balances of opinion indicate in general a less negative view on the market situation.

Waiting Time

In addition to these surveys the number of waiting days at the "bourse" is an important indicator of the development of activity in relation to capacity available.

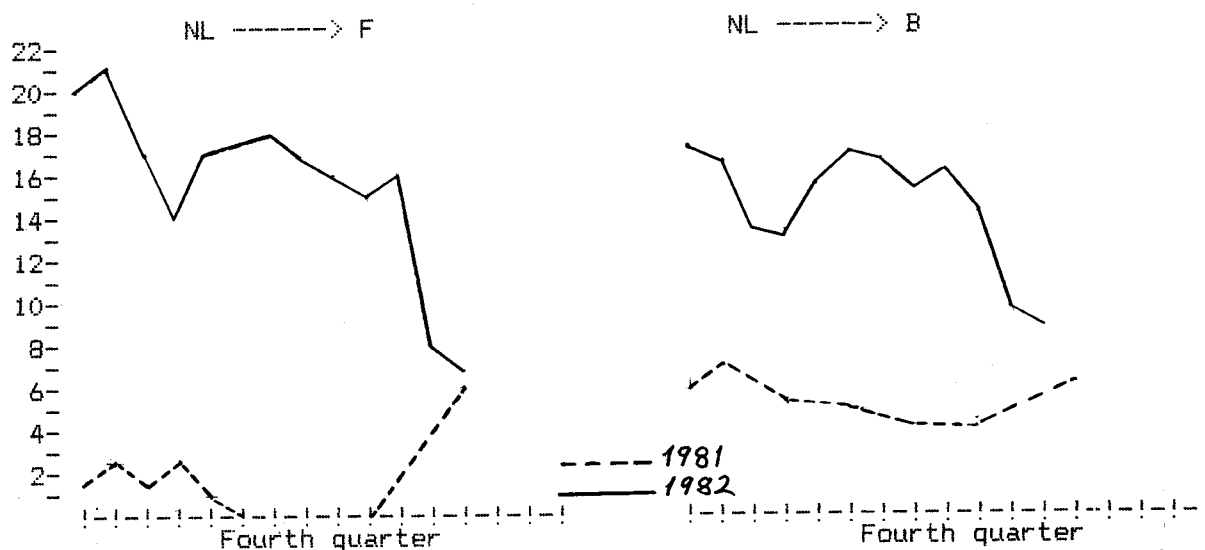
Table 4.3. and the subsequent figures illustrate the important seasonal and trend changes in this indicator.

Table 4.3. : Quarterly average of waiting days in international north-south traffic

Country of origin	Year	Q1	Q2	Q3	Q4
B*	1981	7.0	6.0	8.0	4.5
	1982	5.2	7.5	8.5	7.5
F	1981	8.5	7.0	15.3	14
	1982	9.2	18.0	16.1	13.2
NL	1981	8.3	4.4	5.6	3
	1982	6.5	6.2	9.8	7.1

* Domestic traffic included

Figure 4.4 : Weekly average of waiting days in the relations from the Netherlands to Belgium and France.



In the relations Netherlands to Belgium and France, there was a considerable increase in waiting time. The main reasons behind this development are still the same :

- (i) a sharp drop in ore traffic on the Rhine starting in July;
 - (ii) a subsequent decline in freight rates; and
 - (iii) depression on the sand and gravel market;
- caused waterway transporters to turn to the regulated North-South market. These factors were not compensated by the seasonal increase in transport of agricultural products.

Figure 4.5. Weekly average of waiting days in North-South traffic from Belgium to France, including Belgian domestic traffic and from Belgium to the Netherland (bourse of Antwerp).

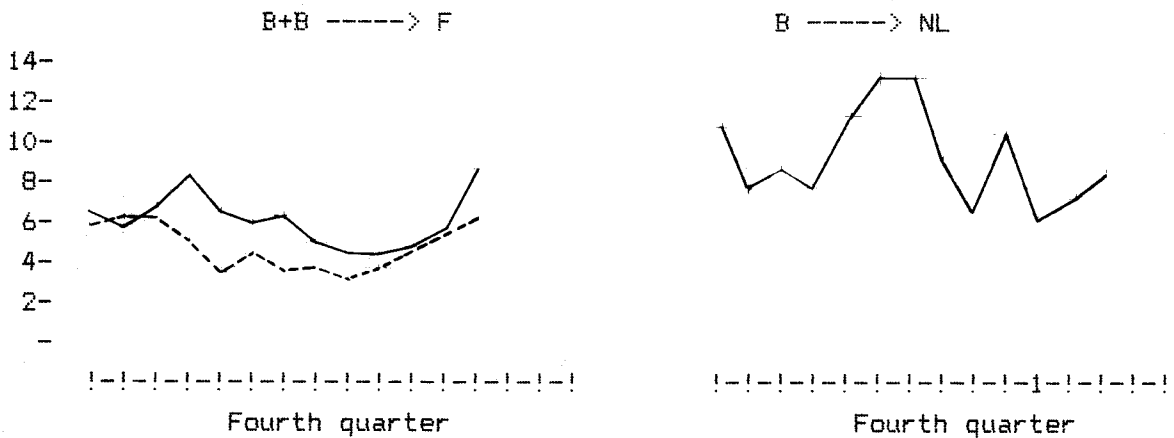
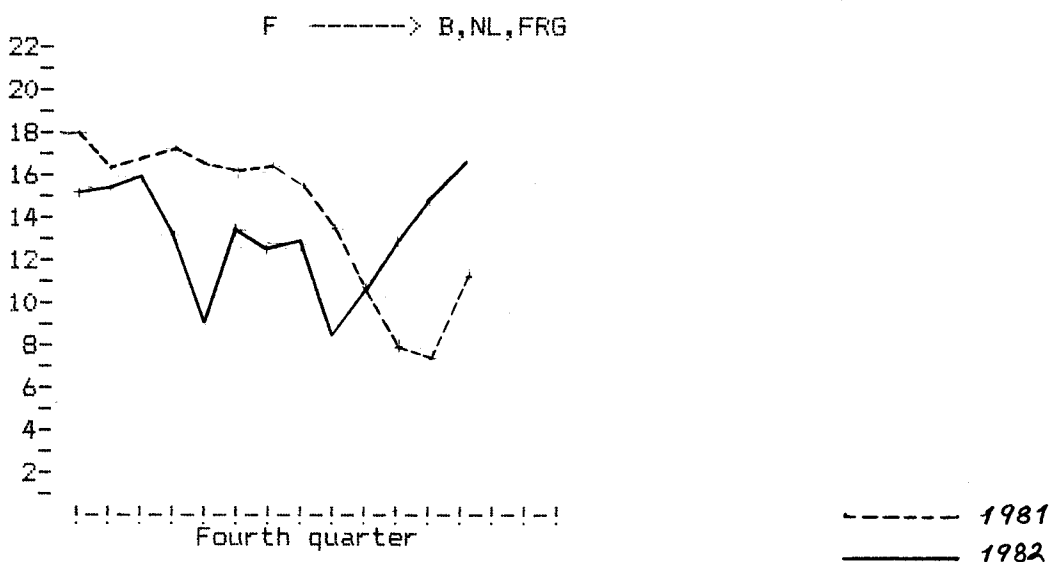


Figure 4.6. Weekly average of waiting days in North-South traffic from France and in the relation Belgium to France.



4.2.2. Border crossings

The average number of border crossings by unladen ships went down which could be explained by the slight upturn on the market compared with the previous quarter.

4.2.3. Prices

A diminishing majority of shippers were of the opinion that freight rates were stable compared to the previous quarters. The balance of opinion was less negative than in the previous quarters (-18 in quarter four as against -8 and -27 during the second and third quarters respectively).

4.2.4. Forecasts : Pessimism

Forecasts by inland waterway transporters of the demand for transport services for the first quarter 1983 are in general much more pessimistic than those for the first quarter 1982 and those for the previous quarter. The opinions of Belgian and Dutch shippers are going in the same direction and are shown in the following table.

Table 4.4. : Balance of opinion on forecasts of activity in the next quarter

Country	Quarter	1982				1983	
		Q1	Q2	Q3	Q4	Q1	Q2
B		-10	-23	-33	-40	-64	
NL		-15	- 8	-48	- 6	-31	

Table 4.5 suggests that waterway transporters in Belgium expect no change and those in the Netherlands expect more negative developments on freight rates.

Table 4.5. Balance of opinion on forecasts of freight rates level in the next quarter.

Country	Quarter	1982				1983	
		Q1	Q2	Q3	Q4	Q1	Q2
B			-10	- 8	0	0	
NL			-12	- 8	0	-10	

SECTION 5 : COMBINED TRANSPORT

The following comments have been established with the assistance of INTERCONTAINER (Societe internationale pour le transport pa transcontainers) for the container traffic and of INTERUNIT (Societe internationale pour le transport par ferroutage) for the piggy-back traffic.

5.1. Container Traffic

5.1.1. These comments on international rail container traffic concern movements between and in transit through community countries, and also entering and leaving the community by rail. Border crossing container traffic by rail, which is managed by Intercontainer on behalf of the European railways recovered strongly in the fourth quarter of 1982, from the viewpoint of the third quarter increasing by 13% and reaching a level 1% above the fourth quarter of 1981. Within the total, inner-European container cargo increased by 9% compared to 1982, while traffic to and from the European container ports in connection with the deep sea liner services fell by 4%. In 1982 the European rail container traffic under Intercontainer control amounted to 719.000 TEU, 8% below 1981.

5.1.2. Growth was noted in traffic between Federal Republic of Germany and both Italy and Greece, between Italy and Belgium and between Community countries and Scandinavia. Market rates and price competition remain severe. Container traffic to and from the Community container ports continued to reflect the depressed container traffic levels in the ports themselves and on the principal trade routes, with some European ports forming a welcome exception. An early change in this position is not foreseen.

5.1.3. The outlook for 1983 is of continuing consolidation of the continental business despite the unfavorable economic and competitive climate and further stagnation of port traffic. Possible modest economic recovery in the second half of the year will not greatly change the transport market position until existing surplus capacity has been reabsorbed.

5.2. Piggy-Back Transport

- 5.2.1. For the fourth quarter 1982, precise statistical figures are not yet available with the exception of those of the Belgian piggy-back enterprise T.R.W. However, indications received from other piggy-back enterprises make clear that they all encounter the same negative developments in traffic as T.R.W. As an indication the growth rates of T.R.W. are given below.
- 5.2.2. While the growth rate during the first half year 1982 compared with the first half year 1981 showed a +26%, the growth rate during the second half year 1982 only reached the level of 9%. In the second half year 1982 T.R.W. carried 7.5% less than in the first half year. The increase in railway tariffs which became effective at 1.1.1983 only intensified the downgoing trend: January 1983 compared with January 1982: -17% February 1983 compared with February 1982: -23%. In total traffic (exports+imports) the decrease is even more significant:
January 1983 compared with January 1982: -31%
February 1983 compared with February 1982: -38%.

ORGANISATIONS UNDERTAKING SURVEYS

(a) Road Opinion Survey

B Institut du Transport Routier
 DK Danmarks Statistik
 D IFO (Institut für Wirtschaftsforschung)
 F Centre de Productivité des Transports
 GR **ΕΘΝΙΚΗ ΣΤΑΤΙΣΤΙΚΗ ΥΠΗΡΕΣΙΑ**
 IRL Central Statistical Office
 I Centro Studi sui Sistemi di Transporto
 L Service central de la Statistique et des Etudes Economiques
 NL Economisch Bureau voor het Weg- en Watervervoer
 UK Department of Transport.

(b) Cost Indices Survey

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

B Institut du Transport Routier
 D BAG (Büdesanstalt für den Güterfernverkehr)
 F Ministère des Transports
 I Centro Studi sui Sistemi di Transporto
 L Ministère des Transports
 NL NIWO (Nederlandsche Internationale Wegvervoer Organisatie)
 CBS (Centraal Bureau voor de Statistiek).

(d) Inland Waterway Opinion Survey

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

SALG af De Europæiske Fællesskabers Tidende og Europa-Parlamentets mødedokumenter
samt af publikationer med angivelse af forkortelsen BV varetages af:

VERTRIEBSBÜROS für Amtsblätter, Sitzungsberichte des Europäischen Parlamentes,
Veröffentlichungen mit Angabe der Abkürzung BV:

Οι Επίσημες Εφημερίδες, (ΕΕ) τα έγγραφα των συνεδριάσεων του Ευρωπαϊκού Κοινοβουλίου
και οι εκδόσεις που φέρουν το σύμβολο ΒV διατίθενται προς ΠΩΛΗΣΗ στις εξής διευθύνσεις:

The Official Journal (OJ) and session documents of the European Parliament (EP doc.)
as well as the publications with mention of the abbreviation BV can be OBTAINED at:

La VENTE des Journaux Officiels (JO), des documents de séance du Parlement européen (PE doc.)
et des publications avec mention du sigle BV est assurée par:

I fascicoli della Gazzetta Ufficiale, i documenti di seduta del Parlamento Europeo
e le pubblicazioni comportanti l'indicazione BV possono essere ACQUISTATI presso;

De VERKOOP van Publikatiebladen, zittingsdocumenten van het Europese Parlement
en publikaties waarbij de letters BV vermeld staan wordt verzorgd door:

BELGIQUE / BELGIË

Moniteur belge / Belgisch Staatsblad
Rue de Louvain 40-42 / Leuvenstraat 40-42
1000 Bruxelles / 1000 Brussel
Tél. 512 00 26
CCP/Postrekening 000-2005502-27

Sous-dépôts / Agentschappen:

Librairie européenne /
Europese Boekhandel
Rue de la Loi 244 / Wetstraat 244
1040 Bruxelles / 1040 Brussel

CREDOC

Rue de la Montagne 34 / Bergstraat 34
Bte 11 / Bus 11
1000 Bruxelles / 1000 Brussel

DANMARK

Schultz Forlag
Møntergade 21
1116 København K
Tlf: (01) 12 11 95
Girokonto 200 11 95

BR DEUTSCHLAND

Verlag Bundesanzeiger
Breite Straße
Postfach 10 80 06
5000 Köln 1
Tel. (02 21) 20 29-0
Fernschreiber:
ANZEIGER BONN 8 882 595

GREECE

G.C. Eleftheroudakis SA
International Bookstore
4 Nikis Street
Athens 11261
Tel. 322 63 23
Telex 219410 ELEF
Sub-agent for Northern Greece:
Molho's Bookstore
The Business Bookshop
10 Tsimiski Street
Thessaloniki
Tel. 275 271
Telex 412885 LIMO

FRANCE

Service de vente en France des publications
des Communautés européennes
Journal officiel
26, rue Desaix
75732 Paris Cedex 15
Tél. (1) 578 61 39

IRELAND

Government Publications Sales Office
Sun Alliance House
Molesworth Street
Dublin 2
Tel. 71 03 09
or by post
Stationery Office
St Martin's House
Waterloo Road
Dublin 4
Tel. 78 96 44

ITALIA

Licosa Spa
Via Lamarmora, 45
Casella postale 552
50 121 Firenze
Tel. 57 97 51
Telex 570466 LICOSA I
CCP 343 509

Subagente:

Libreria scientifica Lucio de Biasio - AEIOU
Via Meravigli, 16
20 123 Milano
Tel. 80 76 79

GRAND-DUCHÉ DE LUXEMBOURG

Office des publications officielles
des Communautés européennes
5, rue du Commerce
L-2985 Luxembourg
Tel. 49 00 81 - 49 01 91
Télex PUBLOF - Lu 1322
CCP 19190-81
CC bancaire BIL 8-109/6003/300

NEDERLAND

Staatsdrukkerij- en uitgeverijbedrijf
Christoffel Plantijnstraat
Postbus 20014
2500 EA 's-Gravenhage
Tel. (070) 78 99 11

UNITED KINGDOM

HM Stationery Office
HMSO Publications Centre
51 Nine Elms Lane
London SW9 5DR
Tel. 01-211 8595

Sub-agent:

Alan Armstrong & Associates
European Bookshop
London Business School
Sussex Place
London NW1 4SA
Tel. 01-723 3902

ESPAÑA

Mundi-Prensa Libros. S.A.
Castelló 37
Madrid 1
Tel. (91) 275 46 55
Telex 49370-MPLI-E

PORTUGAL

Livraria Bertrand, s.a.r.l.
Rua João de Deus
Venda Nova
Amadora
Tél. 97 45 71
Telex 12709-LITRAN-P

SCHWEIZ / SUISSE / SVIZZERA

FOMA

5, avenue de Longemalle
Case postale 367
CH 1020 Renens - Lausanne
Tél. (021) 35 13 61
Télex 25416

Sous-dépôt:

Librairie Payot
6, rue Grenus
1211 Genève
Tél. 31 89 50
CCP 12-236

UNITED STATES OF AMERICA

European Community Information
Service

2100 M Street, NW
Suite 707
Washington, DC 20037
Tel. (202) 862 9500

CANADA

Renouf Publishing Co., Ltd
2182 St Catherine Street West
Montreal
Quebec H3H 1M7
Tel. (514) 937 3519

JAPAN

Kinokuniya Company Ltd
17-7 Shinjuku 3-Chome
Shinjuku-ku
Tokyo 160-91
Tel. (03) 354 0131

Price (excluding VAT) in Luxembourg

ECU 2,25 BFR 100 IRL 1.60 UKL 1.30 USD 2.50



KONTORET FOR DE EUROPÆISKE FÆLLESSKABERS OFFICIELLE PUBLIKATIONER
AMT FÜR AMTLICHE VERÖFFENTLICHUNGEN DER EUROPÄISCHEN GEMEINSCHAFTEN
ΥΠΗΡΕΣΙΑ ΕΠΙΣΗΜΩΝ ΕΚΔΟΣΕΩΝ ΤΩΝ ΕΥΡΩΠΑΪΚΩΝ ΚΟΙΝΟΤΗΤΩΝ
OFFICE FOR OFFICIAL PUBLICATIONS OF THE EUROPEAN COMMUNITIES
OFFICE DES PUBLICATIONS OFFICIELLES DES COMMUNAUTÉS EUROPÉENNES
UFFICIO DELLE PUBBLICAZIONI UFFICIALI DELLE COMUNITÀ EUROPEE
BUREAU VOOR OFFICIËLE PUBLIKATIES DER EUROPESE GEMEENSCHAPPEN

ISSN 0252-2349