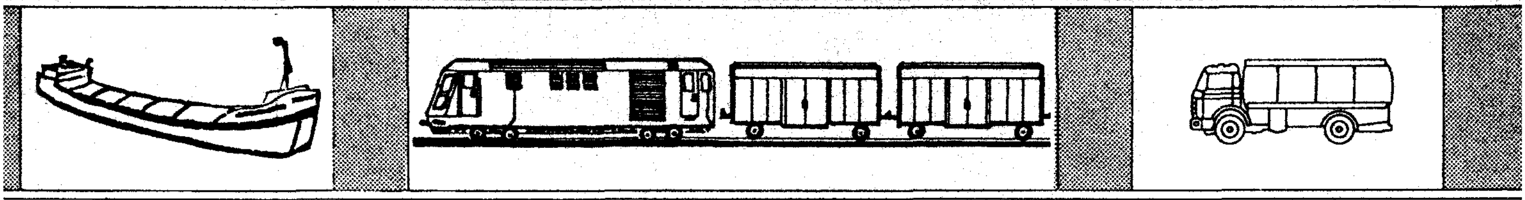
EUROPEAN COMMUNITIES

EUROPA TRANSPORT



OBSERVATION OF THE TRANSPORT MARKETS

MARKET DEVELOPMENTS

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MARKET DEVELOPMENTS

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PRESENTATION OF THE REPORT

The EUROPA TRANSPORT publications, which report the results of the Observation of the Transport Market System, were restructured in 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, inland waterway and combined transport;
- the results of quarterly opinion surveys carried out among international road hauliers;
- the results of six-monthly cost surveys 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 results of quarterly price indices for international rail movements.

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 international inland transport noted in the third quarter of 1982 has continued into the fourth quarter. While rail recovered from the disastrous third quarter, tonnage was still about 8% below the fourth quarter of 1981. Inland waterways, usually strong in the fourth quarter, recorded a 5% fall in tonnage from the third quarter. Only road showed any increase on the previous year, but the gain was marginal. The total tonnage for all three modes in the fourth quarter of 1982 dropped over 4% when compared with the same quarter of 1981; this was the largest decline recorded in the last six quarters.

Because of the poor fourth quarter, the situation for the whole of 1982 was worse than earlier estimates and now shows an overall fall of 2.5%. Within this total, only road increased (+ 1.2%) while waterways (- 2.7%) and especially rail (- 10.4%) showed substantial falls.

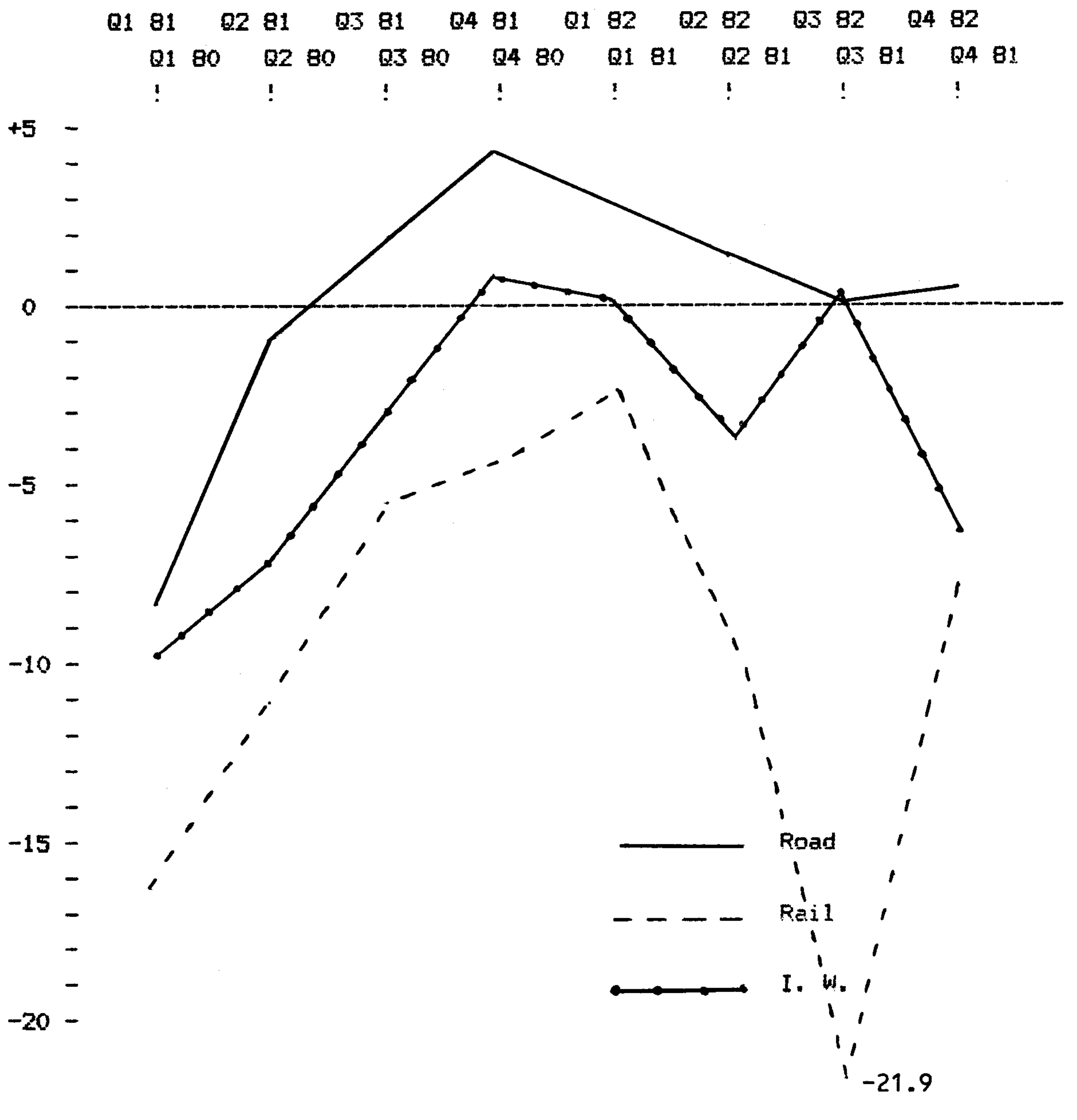
Preliminary indications for 1983 show continued weakness.

SECTION 2 : GENERAL MARKET ASSESSMENT

2.1. Recent trends

The overall situation in the fourth quarter showed a one percent drop on the third quarter to give a final figure for 1982 of -2.4 percent on 1981. Road improved slightly in this final quarter, while rail climbed back strongly from the all time low reached in the previous quarter. Inland waterways turned down sharply (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 / MODE	Q1/81 / Q1/80	Q2/81 / Q2/80	Q3/81 / Q3/80	Q4/81 / Q4/80	Q1/82 / Q1/81	Q2/82 / Q2/81	Q3/82 / Q3/81	Q4/82 / Q4/81
Road	-8.3	-1.0	+2.0	+4.2	+2.9	+1.3	0.0	+ 0.4
Rail	-16.3	-11.1	-5.7	-4.6	-2.7	-10.2	-21.9	-7.8
I.W.	-9.9	-7.1	-3.0	+0.8	+0.1	-3.9	+0.1	-6.7
Total	-10.5	-5.6	-1.6	+1.2	+0.6	-3.0	-3.1	-4.1

2.1.2. Modal Split

In the fourth quarter of 1982 road rose slightly, inland waterways share of the market declined quite sharply, while rail improved considerably on the all-time low reached in the third quarter.

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

Mode	Q4/82	Q4/81	% Change	Modal Share
Road	39.7	39.5	+ 0.4	40.7
Rail	14.9	16.1	-7.8	15.3
I.W.	42.9	46.0	-6.7	44.0
Total	97.5	101.6	-4.1	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 evoulution 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 final quarter of 1982 show a slight improvement on the fourth quarter of the previous year (+0.4%). There was quite a difference in the results of different Member States, with Germany showing a drop of 4.1% (traffic from Denmark being the only positive figure), while France showed an overall increase of 4.6% in the fourth quarter of 1981 (traffic from the Netherlands producing the only negative figure).

2.2.2. Rail

Rail has significantly improved in the fourth quarter on the all time low registered in the previous quarter. Germany showed the most decline when compared to the same quarter of 1981, down 23.2% and France was also negative, at -16.7%. By contrast, Belgium/Luxembourg was up by 4.9%.

2.2.3. Inland Waterways

Inland Waterways failed to maintain the improvement of the previous quarter mainly because of a 15.6% drop in the german figures. The largest relation, Netherlands to Germany, was down 16.7% but the second largest, Germany to the Netherlands, was up by 2.1% on the same quarter of the previous year.

2.3. United Kingdom, Ireland and Greece

2.3.1. United Kingdom

Compared with the final quarter of 1981, the fourth quarter of 1982 showed a 6% increase in powered vehicles in ro/ro ferries from the United Kingdom to mainland Europe.

For the first time since the fourth quarter of 1974, UK-registered powered vehicles were outnumbered by their competitors, their share dropping to 48%, down from 52% in the previous quarter. France's share increased to 20% - the peak reached in the second quarter of 1982.

2.3.2. Ireland

The international haulage sector in Ireland continues to be depressed, mainly because of increasing costs and a lack of revenue buoyancy.

2)

Refrigerated traffic volume in the fourth quarter of 1982 was lower than for the corresponding quarter of 1981, although the quarter showed some growth over the previous three months.
Dry goods traffic was lower than the fourth quarter of 1981, but higher than the third quarter of 1982.
Meat traffic, which normally hits its annual peak at the end of the year was, on the contrary, lower than the previous quarter.

2.3.3. Greece

Imports by road for the fourth quarter of 1982 continued to grow strongly being 35% higher than the corresponding period of the previous year. All relations shared in this growth. Exports were also up 19% on the previous year, the important relation with Germany showing a 27% growth.

SECTION 3 : ROAD SURVEYS

This section reports on three surveys:

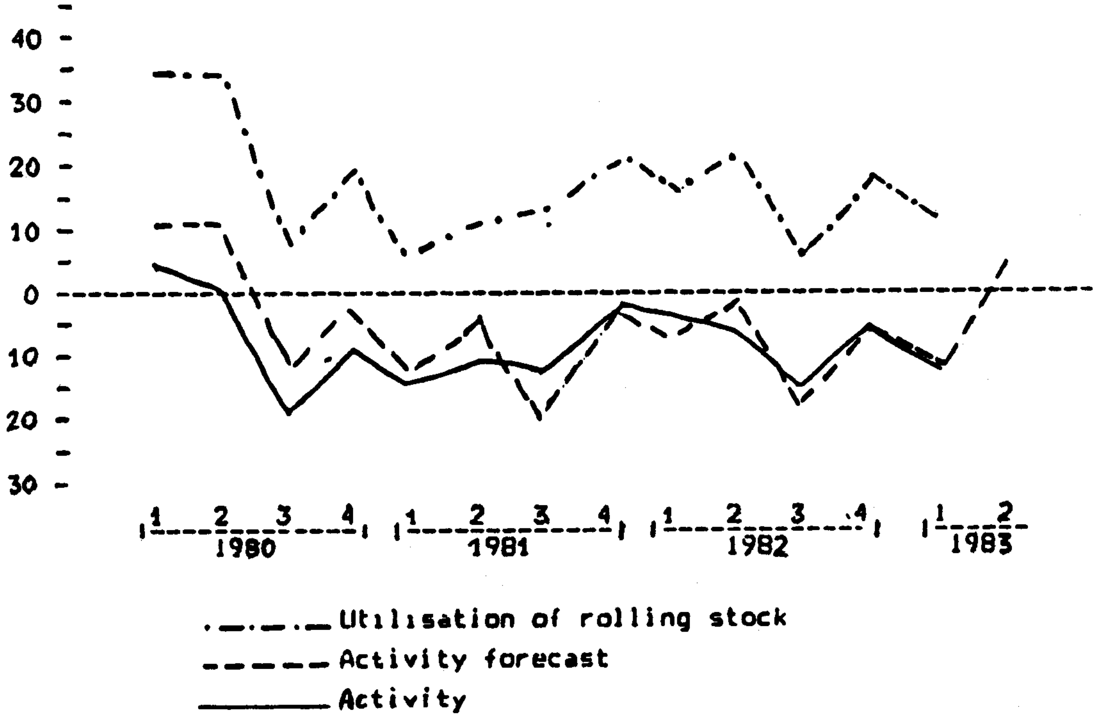
- the road inquiry survey amongst hauliers noting their opinion on recent trends in international traffic;
- cost indices survey;
- price indices survey.

3.1. Road Inquiry Survey

3.1.1. Summary of Activity Indicators (Figure 3.1, Tables 3.1 and 3.2)

Road transport weakens.
The inquiry for the first quarter of 1983 indicates the usual seasonal decline in the level of activity on the previous quarter; the level is however lower than the same quarter last year.

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



3.1.2. Activity: in decline

For the first quarter of 1983, the balance of opinion (percentage difference between positive and negative replies) fell by 5 points (from - 6% to - 11%) in comparison with the previous quarter. Italy and Greece had the biggest declines. Germany was the only country to show an improvement.

3.1.3. Forecasts: seasonal improvement

The improvement forecast for the 2nd quarter is essentially seasonal; however, it is the first time since the 2nd quarter of 1980 that the balance of opinion is positive. The rise of 17 points (from -12% to 5%) in comparison with the previous quarter is one of the largest improvements foreseen.

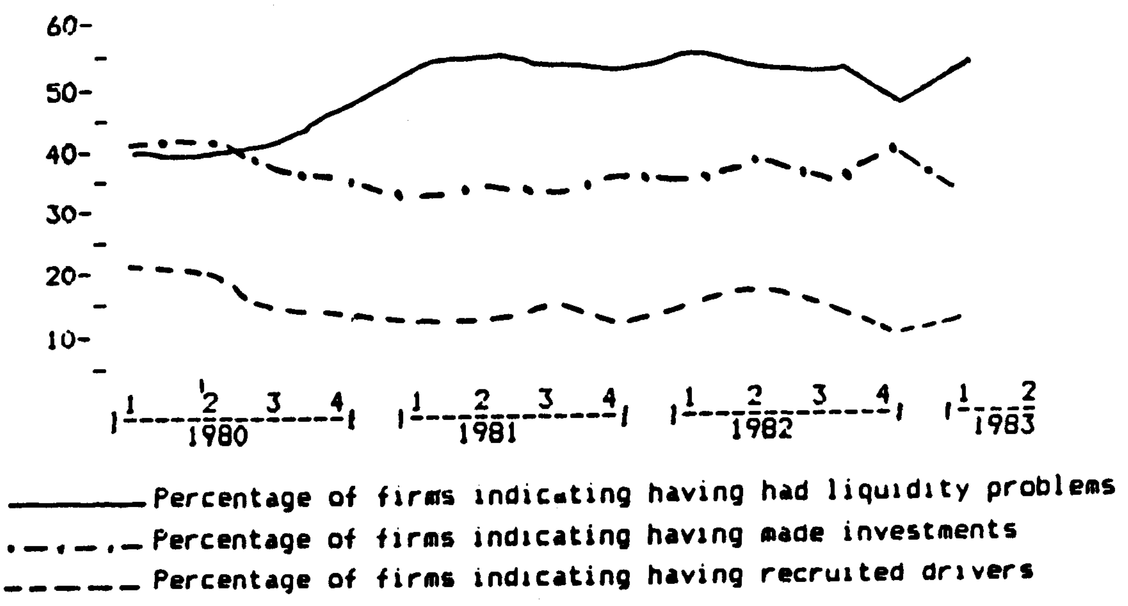
3.1.4. Utilisation of rolling stock

The overall opinion remains positive but there is a little drop of 6 points compared with the fourth quarter of 1982, the balance of replies falling from 17% to 11%.
There is a great variation between member states, the balance of opinions exceeding +30 in Netherlands, Belgium, United Kingdom and Denmark, while France, Italy and Greece have negative balances.

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

With the exception of recruitment, the results are weaker than those for the fourth quarter of 1982.

Figure 3.2. Economic Indicators



3.1.6. Recruitment: upturn

The percentage of firms having recruited drivers is three points higher than the previous quarter and now stands at 13%.
Even if the Luxemburg firms recorded the highest recruitment levels (42%), of any Member State since early 1980, hauliers were finding recruitment more difficult.

In Greece percentage difference rose by 9 points (from 20% to 29%), but the Greek hauliers are also finding recruitment more difficult.

3.1.7. Cash flow problems: deterioration

The improvement in the previous quarter was short-lived, and the percentage of firms having cash flow problems increased to 50%. Italian, Greek and French hauliers are still having many problems.

3.1.8. Investments: falling

Overall the proportion of firms investing fell from 38% to 33%. The decline in investment was particularly marked in France and the United Kingdom.

Table 3.1.

ECT-0310	INTERNATIONAL TRANSPORT BUSINESS ACTIVITY													1st quarter 1983 Forecast: 2nd quarter 1983			
		1980				1981				1982				1983			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEUTSCHLAND	+	20	18	15	16	20	18	19	20	22	19	18	23	23	16		
	=	56	54	45	51	46	54	48	49	49	55	44	44	48	69		
	-	24	28	40	33	34	28	33	31	29	26	38	33	29	15		
	S	-4	-10	-25	-17	-14	-10	-14	-11	-7	-7	-20	-10	-6	1		
FRANCE	+	30	22	18	14	16	14	16	21	18	15	14	15	14	9		
	=	48	51	50	49	41	47	47	47	47	49	50	43	43	55		
	-	22	27	32	37	43	39	37	32	35	36	36	42	43	36		
	S	8	-5	-14	-23	-27	-25	-21	-11	-17	-21	-22	-27	-29	-27		
ITALIA	+	20	25	16	14	15	15	17	18	15	16	14	15	14	27		
	=	53	45	44	41	41	44	42	53	49	47	41	51	45	58		
	-	27	30	40	45	44	41	41	29	36	37	45	34	41	15		
	S	-7	-5	-24	-31	-29	-26	-24	-11	-21	-21	-31	-19	-27	12		
NEDERLAND	+	31	23	13	34	30	20	25	26	34	32	26	31	31	27		
	=	39	55	44	45	41	65	49	52	43	45	41	50	44	64		
	-	30	22	43	21	29	15	26	22	23	23	33	19	25	9		
	S	1	1	-30	13	1	5	-1	4	11	9	-7	12	6	18		
BELGIQUE-BELGIE	+	29	27	19	25	25	28	22	31	28	31	23	30	27	24		
	=	48	49	39	47	46	41	43	44	48	51	43	47	46	63		
	-	23	24	42	28	29	31	35	25	24	18	34	23	27	13		
	S	6	3	-23	-3	-4	-3	-13	6	4	13	-11	7		11		
LUXEMBOURG	+	24	21	13	27	25	27	12	26	28	26	21	25	21	34		
	=	60	66	44	43	46	49	51	61	48	50	51	47	52	52		
	-	16	13	43	30	29	24	37	13	24	24	28	28	27	14		
	S	8	8	-30	-3	-4	3	-25	13	4	2	-7	-3	-5	20		
UNITED KINGDOM	+			16	28	23	21	24	28	28	25	21	24	23	23		
	=			42	46	49	53	56	59	59	56	63	64	61	66		
	-			42	26	28	26	20	13	13	19	16	12	16	11		
	S			-26	2	-5	-5	4	15	15	6	5	12	7	12		
IRELAND	+		26	41	26	18	24	21	25	21	27	20	28	21	31		
	=		29	35	46	30	47	39	40	48	39	38	37	47	60		
	-		45	24	28	52	29	40	35	31	34	42	35	32	9		
	S		-19	17	-2	-34	-5	-19	-10	-10	-7	-22	-7	-11	22		
DANMARK	+	34	27	19	26	24	20	21	24	26	26	17	27	26	20		
	=	58	57	53	57	57	65	61	60	64	64	61	63	65	72		
	-	8	16	28	17	19	15	18	16	10	10	22	10	8	8		
	S	26	11	-9	9	5	5	3	8	16	16	-5	17	18	12		
HELLAS	+								27	16	14	17	28	19	39		
	=								47	45	31	34	36	39	39		
	-								26	39	55	49	36	42	22		
	S								1	-23	-41	-32	-8	-23	17		
E.E.C.	+	26	23	17	21	20	19	20	24	22	21	19	23	21	22		
	=	51	52	45	48	44	50	47	50	50	50	46	48	47	61		
	-	23	25	38	31	36	31	33	26	28	29	35	29	32	17		
	S	3	-2	-21	-10	-16	-12	-13	-2	-6	-8	-16	-6	-11	5		

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

Table 3.2.

ECT-0320 UTILIZATION OF ROLLING STOCK 1st quarter 1983

		1980				1981				1982				1983			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEUTSCHLAND	+	39	33	27	30	26	28	21	29	33	28	20	19	27			
	=	45	53	47	52	50	53	52	47	49	51	51	54	51			
	-	16	14	26	18	24	19	27	24	18	21	29	27	22			
FRANCE	+	28	49	37	43	36	37	44	46	29	42	27	30	22			
	=	54	29	32	23	20	27	25	25	35	24	40	41	41			
	-	18	22	31	34	44	36	31	29	36	34	33	29	37			
ITALIA	+	27	27	22	20	14	14	18	17	15	14	17	12	11			
	=	55	52	56	47	48	55	59	62	64	62	52	64	54			
	-	18	21	22	33	38	31	23	21	21	24	31	24	35			
NEDERLAND	+	59	56	30	44	49	46	47	53	51	60	38	41	42			
	=	34	39	39	37	32	42	36	37	37	35	40	45	46			
	-	7	5	31	19	19	12	17	10	12	5	22	14	12			
BELGIQUE-BELGIE	+	51	52	31	32	28	33	31	41	41	56	39	45	48			
	=	36	37	41	47	48	46	51	45	43	34	42	41	40			
	-	13	11	28	21	24	21	18	14	16	10	19	14	12			
LUXEMBOURG	+	59	58	45	40	29	37	29	28	19	21	14	37	38			
	=	39	36	45	58	57	56	57	65	74	68	72	50	53			
	-	2	6	10	2	14	7	14	7	7	11	14	13	9			
UNITED KINGDOM	+			44	50	42	45	48	68	65	62	58	69	60			
	=			26	27	33	34	36	25	26	22	23	24	30			
	-			30	23	25	21	16	7	9	16	19	7	10			
IRELAND	+		38	57	63	28	30	31	36	34	30	30	46	37			
	=		47	33	22	40	40	38	36	37	40	47	41	39			
	-		15	10	15	32	30	31	28	29	30	23	13	24			
DANMARK	+	64	55	33	49	42	39	41	46	49	47	43	54	55			
	=	33	39	50	43	45	47	47	40	43	47	44	41	37			
	-	3	6	17	8	13	14	12	14	8	6	13	5	8			
HELLAS	+								23	17	14	8	27	17			
	=								56	54	29	31	39	41			
	-								21	29	57	61	34	42			
E.E.C.	+	44	45	32	39	33	33	34	39	35	41	30	36	34			
	=	44	42	43	40	39	43	44	41	44	39	44	45	43			
	-	12	13	25	21	28	24	22	20	21	20	26	19	23			

KEY:
+ : 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

Table 3.3.

ECT-0330

RECRUITMENT OF DRIVERS

1st quarter 1983

Percentage of firms indicating having recruited drivers

	1980				1981				1982				1983			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEUTSCHLAND	13	7	4	3	5	3	4	2	5	5	3	2	6			
FRANCE	8	6	4	3	4	3	4	4	5	3	4	4	6			
ITALIA	32	32	27	26	22	29	28	22	21	24	18	16	17			
NEDERLAND	36	32	16	19	15	19	14	11	18	19	19	8	15			
BELGIQUE-BELGIE	26	19	12	17	17	18	19	10	21	26	19	15	18			
LUXEMBOURG	50	42	34	21	35	30	14	27	21	31	28	27	42			
UNITED KINGDOM			4	17	12	10	19	25	21	19	20	21	18			
IRELAND		23	14	19	24	12	12	24	17	15	10	19	21			
DANMARK	21	19	14	13	12	8	17	7	14	20	6	11	10			
HELLAS								40	36	24	25	20	29			
E.E.C.	21	19	12	13	12	12	14	11	14	15	12	10	13			

Table 3.4.

ECT-0340

LIQUIDITY PROBLEMS

Percentage of firms indicating having had liquidity problems

	1980				1981				1982				1983			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEUTSCHLAND	29	29	32	34	43	44	39	42	40	39	40	38	31			
FRANCE	52	54	53	61	67	66	64	61	64	60	60	57	64			
ITALIA	49	57	53	64	65	72	70	70	72	76	69	70	76			
NEDERLAND	20	16	23	17	19	16	18	15	18	12	11	10	13			
BELGIQUE-BELGIE	26	25	27	29	27	39	28	32	32	27	26	31	27			
LUXEMBOURG	26	20	34	21	63	15	43	27	57	38	40	42	27			
UNITED KINGDOM			54	58	64	57	57	51	56	49	53	50	49			
IRELAND		85	57	62	79	59	53	51	58	58	50	59	59			
DANMARK	14	14	24	19	26	23	31	29	32	21	32	18	20			
HELLAS								63	54	76	79	69	72			
E.E.C.	39	40	41	46	53	53	51	50	53	49	49	45	50			

Table 3.5.

ECT-0350

INVESTMENT — 1st quarter 1983

Percentage of firms indicating having made investments

	1980				1981				1982				1983			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEUTSCHLAND	42	45	35	34	32	28	32	30	27	35	30	34	34			
FRANCE	39	39	35	30	31	30	27	34	34	35	31	42	29			
ITALIA	33	39	35	34	26	29	26	27	26	25	21	20	18			
NEDERLAND	52	41	41	40	38	44	36	47	46	42	43	46	41			
BELGIQUE-BELGIE	39	38	35	34	30	36	30	29	30	39	32	38	42			
LUXEMBOURG	50	42	32	26	17	22	21	33	26	29	28	47	38			
UNITED KINGDOM			48	57	30	52	50	49	53	63	61	67	49			
IRELAND		33	38	46	28	27	30	29	25	22	27	19	31			
DANMARK	57	70	43	32	35	39	44	40	43	45	35	42	43			
HELLAS								46	33	42	24	29	42			
E.E.C.	41	42	36	34	31	33	31	34	33	36	32	38	33			

3.2. Cost Indices

3.2.1. Coverage

Six-monthly surveys are now being conducted on costs in Germany, France, the Netherlands, Belgium/Luxembourg, 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 belgian 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. Total costs are given in Tables 3.8 and 3.9; and figure 3.4.

3.2.3. Overall costs developments : second half of 1982

For the second half of 1982, costs increased for hauliers in all Member States in both national currency and in ECU. In countries with low inflation, below 7%, Germany and the Netherlands, increases are small. In the Netherlands the increase is 1.4%, while for Germany, the increase is very small, 0.1%. Countries with inflation over 7%, France; Belgium Luxembourg and Denmark, the increases were 5.3%, 3.4% and 9.1% respectively. In terms of ECU the increases varied from 3.2% in Belgium/Luxembourg to 10.1% in Denmark.

The German and Dutch surveys give a breakdown of the total costs by geographical relations. In the German survey, in national currency, increases to Member States were very small, below 0.4%, except to the UK and Greece where the increases are 3.2% and 2.1% respectively.

In the Dutch survey, in national currency, increases to Member States are similar, around the 1.4% mark. The lowest increase being to Ireland 0.7%, and highest increase to Italy 2.2%.

Figure 3.3.

FUEL COSTS IN ECU

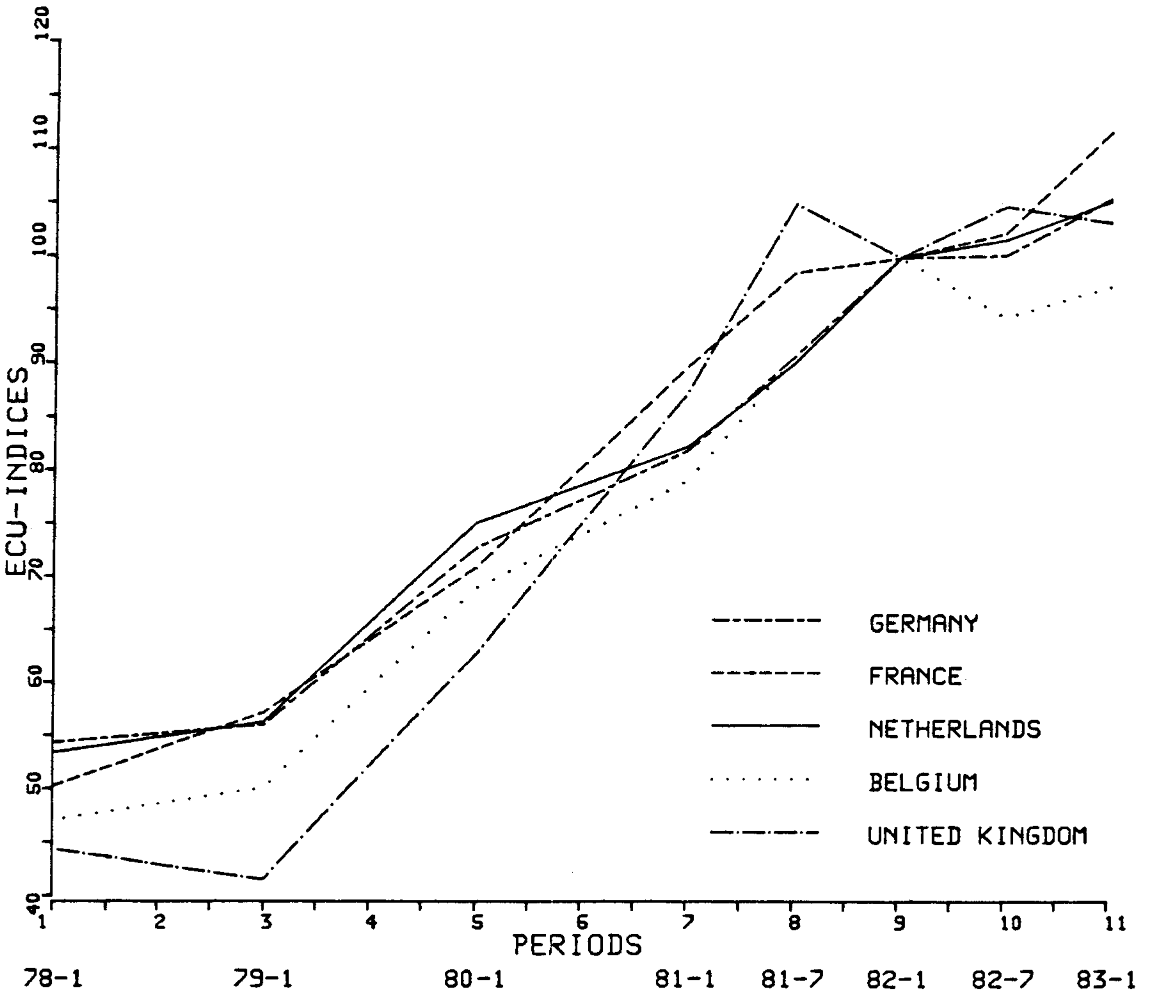


Figure 3.4.

TOTAL COSTS IN NATIONAL CURRENCY

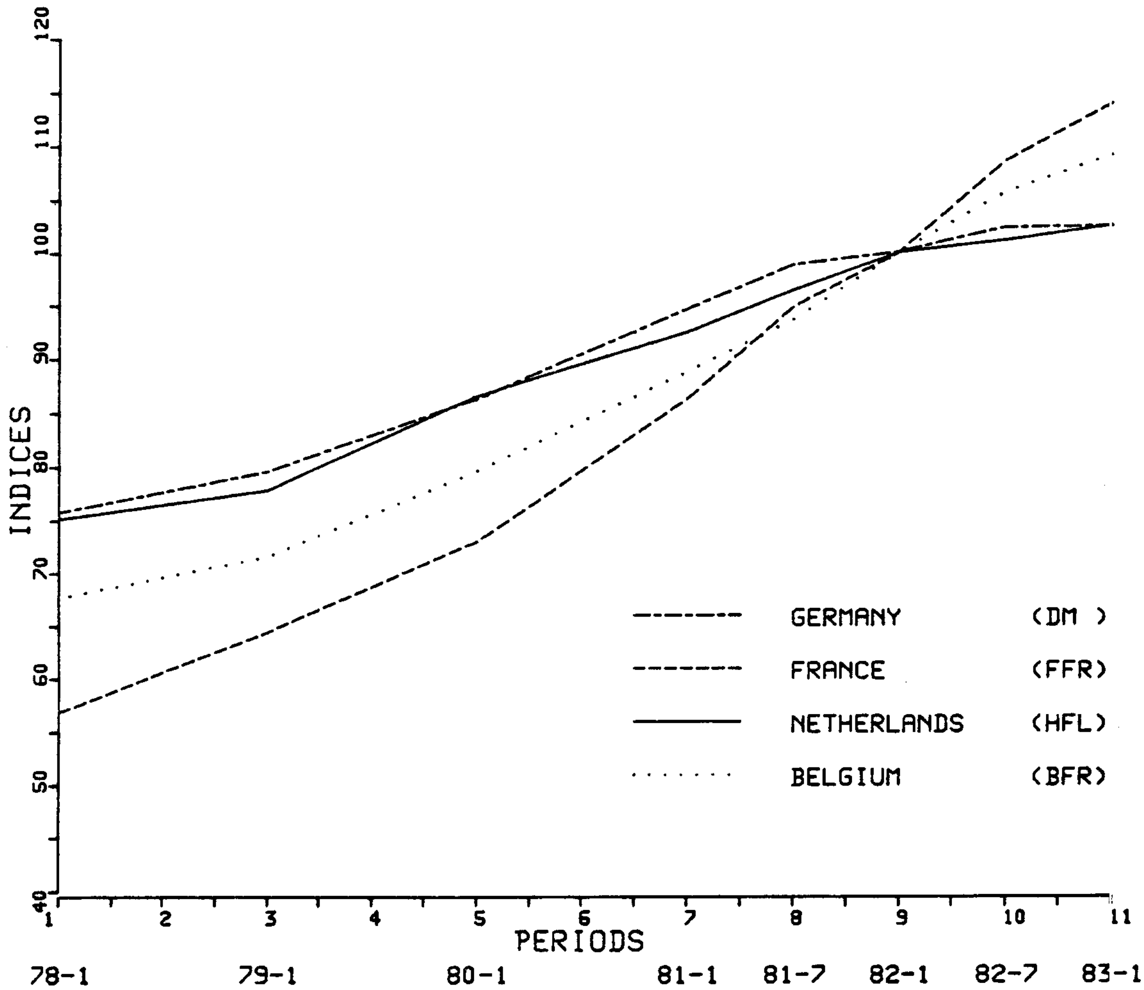


Table 3.6

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	1.1.83
Germany	(DM)	57,6	57,5	74,1	86,5	93,6	100,0	96,8	99,1
France	(FF)	46,9	53,1	66,5	86,2	95,1	100,0	108,2	117,2
Netherlands	(HFL)	55,4	57,0	77,0	86;2	94,4	100,0	99,0	99,4
Belgium } Luxemburg }	(BFR)	45,5	47,7	66,9	78,9	90,0	100,0	102,2	105,4
U.K.	(LUK)		49,8	70,7	82,6	102,4	100,0	102,4	111,5
Denmark	(DKR)				78,1	95,8	100,0	100,0	118,0

Table 3.7

FUEL COST IN ECU

	1.1.78	1.1.79	1.1.80	1.1.81	1.7.81	1.1.82	1.7.82	1.1.83
Germany	54,3	56,0	72,7	81,9	90,7	100,0	100,2	105,5
France	50,3	57,2	70,9	89,8	98,6	100,0	102,3	111,8
Netherlands	53,4	56,3	75,1	82,3	90,1	100,0	101,7	105,3
Belgium } Luxemburg }	47,1	50,1	68,9	79,1	90,7	100,0	94,4	97,3
U.K.	44,4	41,5	62,7	87,4	105,0	100,0	104,8	103,3
Denmark				78,5	98,6	100,0	97,7	116,6

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	1.1.83
Germany	75,8	79,6	86,3	94,6	98,8	100,0	102,3	102,4
France	56,9	64,5	73,0	86,3	94,8	100,0	108,5	113,8
Netherlands	75,2	77,9	86,6	92,5	96,4	100,0	101,1	102,5
Belgium / Luxemburg	67,7	71,6	79,6	88,8	93,6	100,0	105,6	109,0
U.K.								
Denmark				88,3	95,1	100,0	102,5	111,6

Table 3.9

COST INDICES IN ECU

	1.1.78	1.1.79	1.1.80	1.1.81	1.7.81	1.1.82	1.7.82	1.1.83
Germany	71,4	77,5	84,7	89,6	95,8	100,0	105,9	109,0
France	61,2	69,5	77,8	89,8	98,2	100,0	102,6	108,5
Netherlands	72,4	77,1	84,5	38,3	92,1	100,0	103,8	108,6
Belgium / Luxemburg	70,0	75,2	82,0	89,1	94,3	100,0	97,5	100,7
U.K.								
Denmark				88,8	96,1	100,0	100,1	110,2

3.2.4. Fuel costs developments : second half of 1982

For the second half of 1982, costs increased in all Member States in national currency. Those with strong currencies showed small increases, 2.3% in Germany; 0.4% in the Netherlands. The exception was Belgium/Luxembourg where the increase was 3.2%. In countries with weak currencies, the increase was 9.0% and above. When converted into ECU, the increases vary from 2.9% for Belgium/ Luxembourg; 3.6% the Netherlands; 5.2% in Germany and in France. In Denmark the increase was over 9%, but in the UK a decrease of 1.5% occurred.

3.3. Price Surveys

3.3.1. Coverage

Price surveys are now being carried out in Germany, France, Italy, the Netherlands, Belgium and Luxembourg. The analysis relates to movements between these Member States up to the fourth quarter of 1982. The relationships of Belgium/Luxembourg to all Member States are only up to the third quarter of 1982.

3.3.2. Methodology

The base point for the price indices results has 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 lates figures available from Eurostat "Community Survey on the carriage of goods by Road". Volume 3.

The analysis of german haulier data now takes specific account of traffic mix changes, whereas the data previously used, which were taken from BÄG publications, could not take traffic mix changes into account. The old belgian 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) showed a small drop in the fourth quarter of 1982 for German, Italian and Dutch hauliers, while with French hauliers the increase was almost 4%.

Average prices (in national currencies) for 1982, show increases of 8% for French hauliers, 6.9% for Italian hauliers, 0.4% for German hauliers and a drop of 0.3% for Dutch hauliers. Belgian/ Luxembourg hauliers show an increase fo 4% to the third quarter of 1982.

These average price indices (in national currencies) together with those in a common currency (in ECU) are shown in 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/Luxembourg hauliers on the relations between these Member States. While Figure 3.8. shows similar average prices of Italian hauliers and partner country.

3.3.5. German hauliers

Average prices (in ECU) on all relations have marginally increased since the third quarter of 1982. Over the period of 1982, increases in ECU have changed about 4.5% on all relations. In national currency, this increase is only 0.4% for the period of 1982, due to the strength of the Deutchmark.

3.3.6. French hauliers

Results for French hauliers are up to date, but caution should be used when comparing the results prior to first quarter of 1982. A new survey started at this time and therefore comparison between old and new series is difficult.

The average prices (in ECU) on all relations show very small changes for the period of 1982. In the second and third quarter of 1982 average prices dropped in most of the relations. In the fourth quarter, average prices increased overall by 3.8%; with Germany the increase was 3.6%; the Netherlands 2.9%; Italy 4.9% and Belgium/Luxembourg 3%.

Looking at the period for 1982 the increase is only 2%, reflecting the drop in average prices in the second and third quarters of 1982.

In national currency the increase for the period of 1982 is 8.2% and for the fourth quarter of 1982 about 4%, showing half the increase in average prices occurred in the fourth quarter of 1982.

3.3.7. Italian hauliers

Average prices (in ECU) on relations with Germany and the Netherlands have fallen in the fourth quarter of 1982 by 2.3% and 5.5% respectively. This is the second quarter in which a fall in average prices has occurred in these relations, while with France there is small increase of 1.3% and Belgium/Luxembourg a very small drop of 0.1%. Overall the drop in average prices is 1.5% and in national currency a drop 0.4%.

For the period of 1982 average prices in ECU have increased by 4.4%. In the relations with Germany, Belgium/Luxembourg and France average prices increased by 6.3%—6.7% while the relation with The Netherlands shows a drop of 1.3% in average prices.

3.3.8. Dutch hauliers

Dutch hauliers data on the relation with Belgium/Luxembourg have been received to the fourth quarter of 1982. This has meant an adjustment of the overall results for the last quarters of 1982.

Average prices (in ECU) to France, Germany and Italy have increased slightly (2.2%, 1.1% and .5% respecitvely) while to Belgium/ Luxembourg a small decrease of 0.3% was registered. Overall average prices have increased by 0.9% compared to the third quarter of 1982. In natioanl currency after adjusting the results with Belgium/ Luxembourg there was an overall increase of 1% for the second quarter, 0.7% for the third quarter and 0.6% for the fourth quarter.

For the period of 1982, overall average prices (in ECU) increased by 4.2%, and the relations with Germany, France and Italy showing increases of baout 5%, while with Belgium/ Luxembourg, the average price decreased by about 1.0%.

3.3.9. Belgium/Luxembourg

Data for the fourth quarter of 1982 were received late, due to technical computer problems. Analysis of results will be incorporated in the following report.

Figure 3.6: EFFECTS OF CHANGES IN EXCHANGE RATES

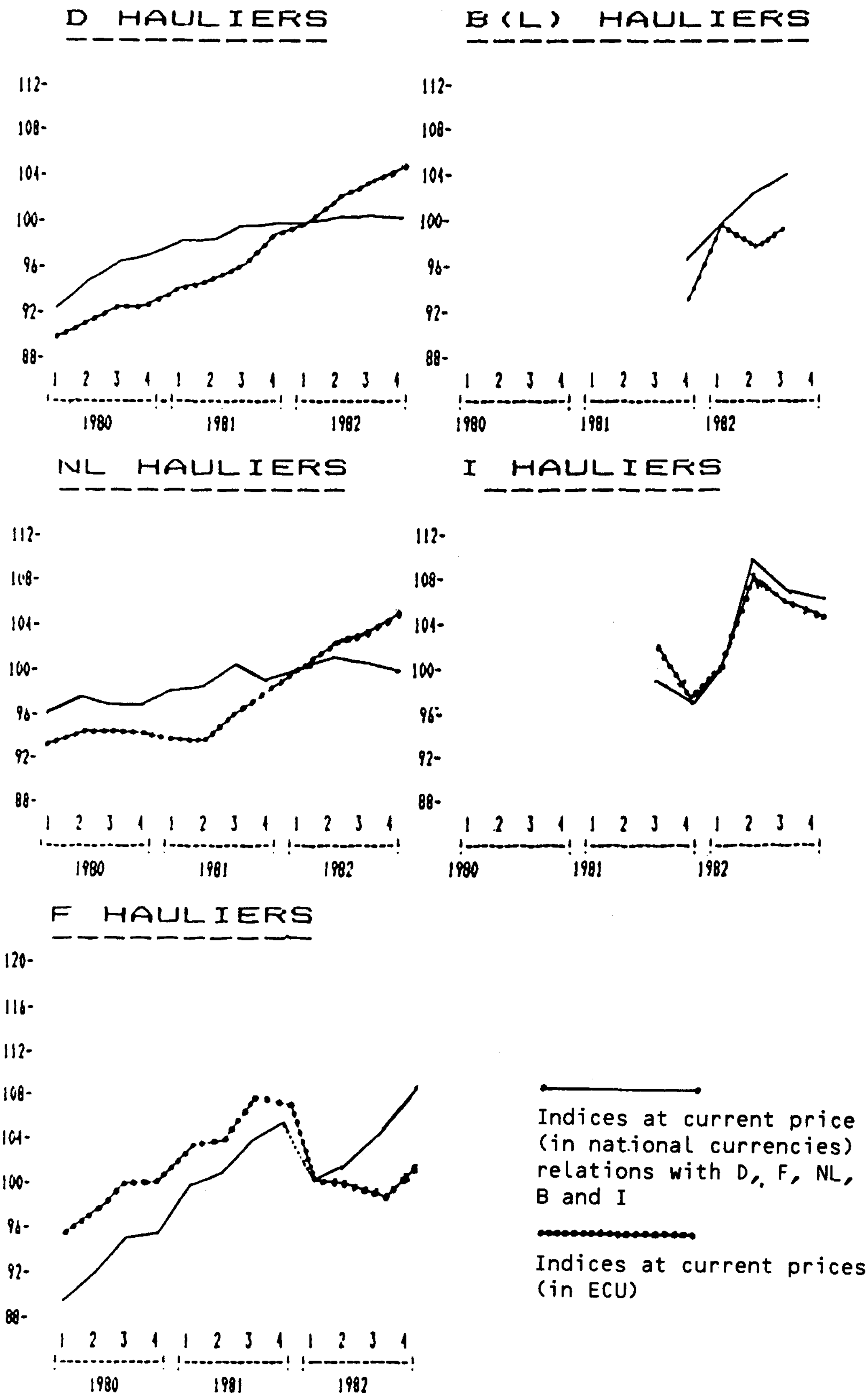


Figure 3.7: PRICE DEVELOPMENT IN RELATIONS BETWEEN D, F, NL AND B

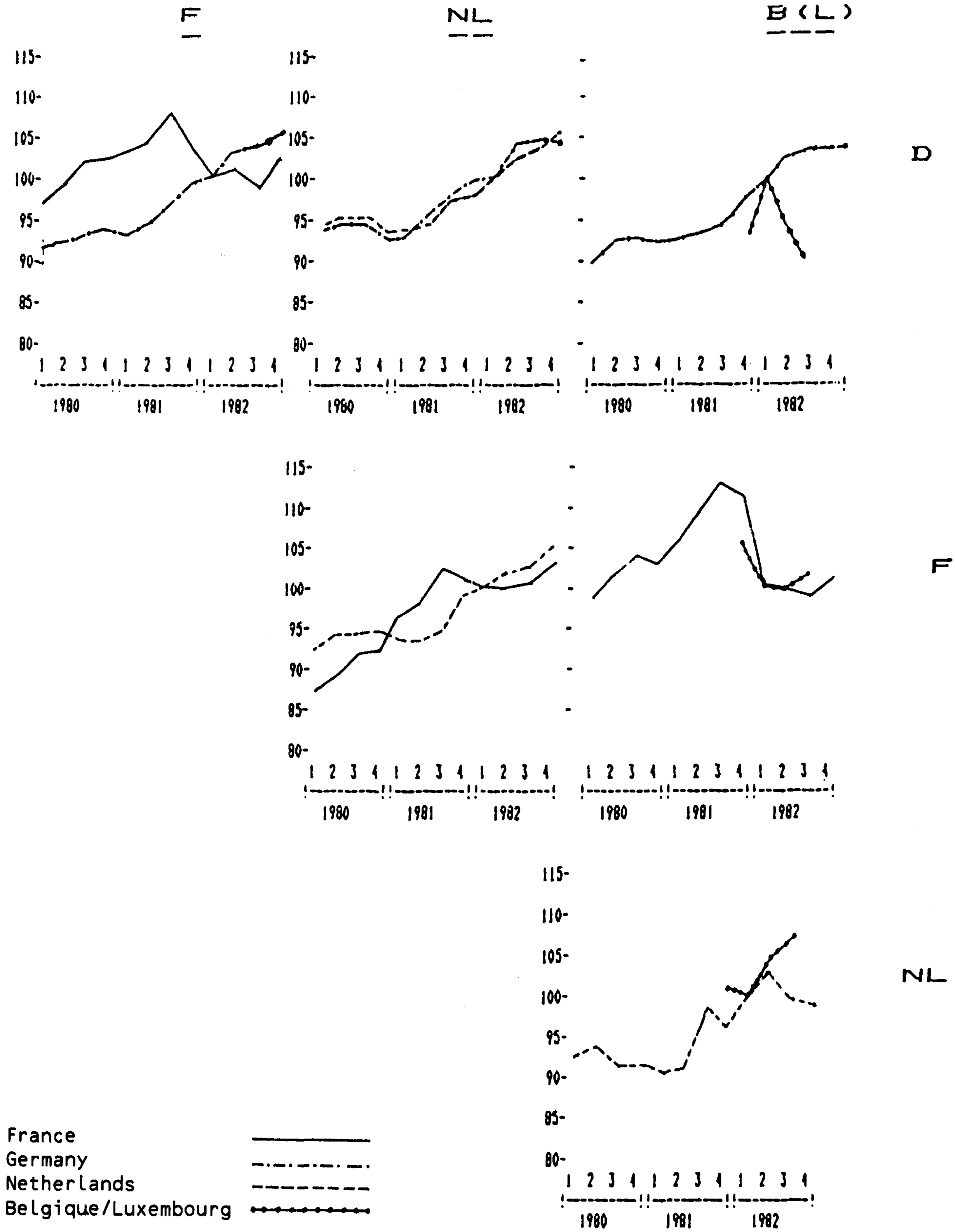
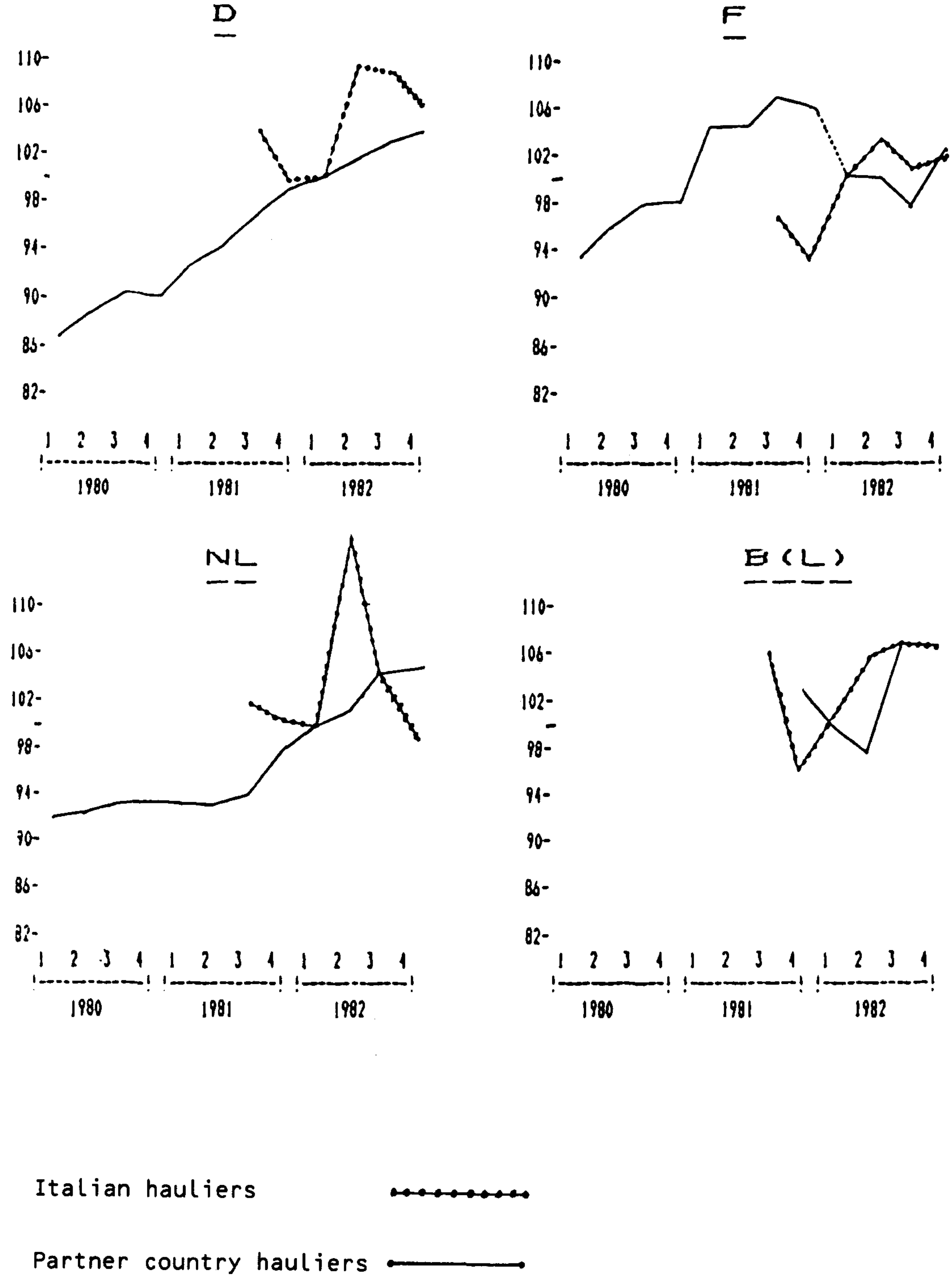


Figure 3.8: PRICE DEVELOPMENT IN RELATIONS WITH ITALY



SECTION 4 : WATERWAY SURVEYS

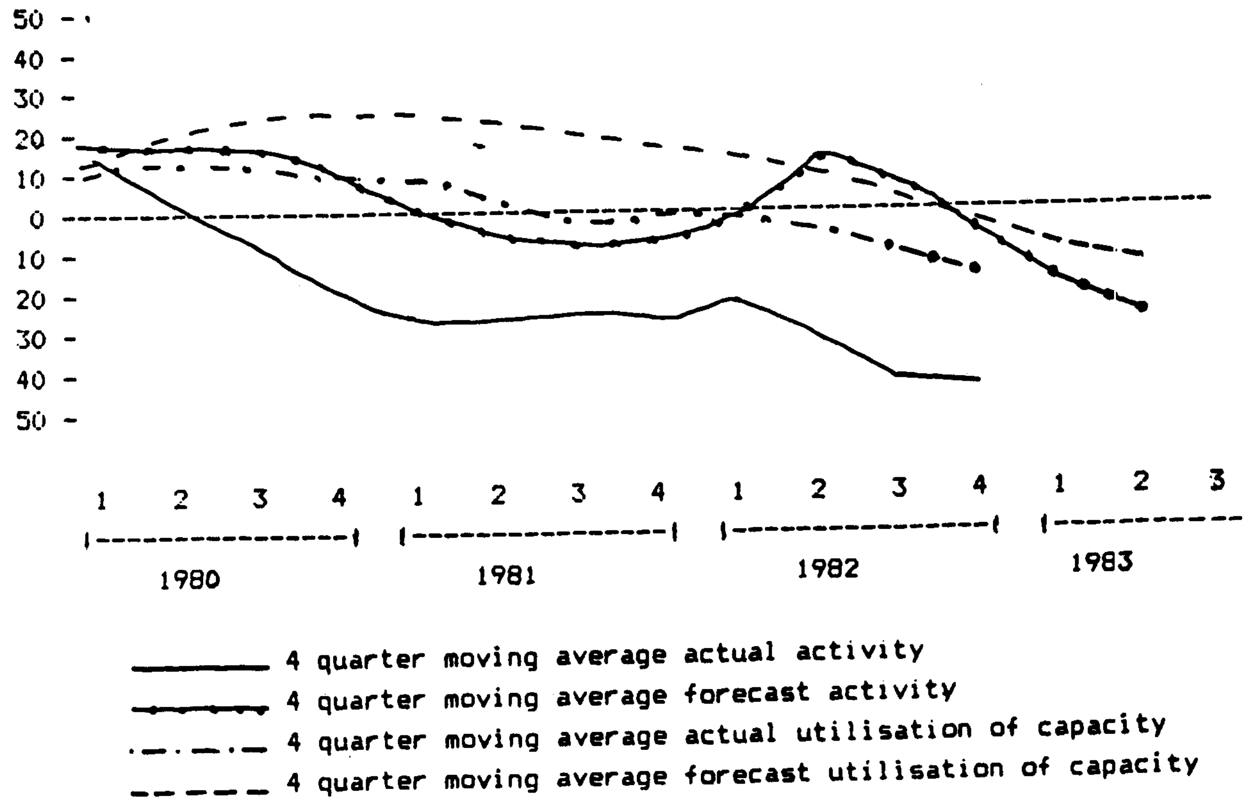
4.1. Rhine traffic

4.1.1. Activity

In the opinion of shippers surveyed the level of activity for the fourth quarter 1982 is considerably worse than that of the fourth quarter 1981 and is at its lowest point since surveys started in 1977. 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 (figure 4.1).

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

Aggregate balance of opinions (in percentage)



After a slight recovery in October, the tendency as indicated above continued to be downward resulting in a further decline in the fourth quarter of 1982. The decline in the upstream and downstream activity produced a further growth of overcapacity in the fourth quarter of 1982. The downward trend in the actual utilisation of capacity which began in the fourth quarter of 1981, continued.

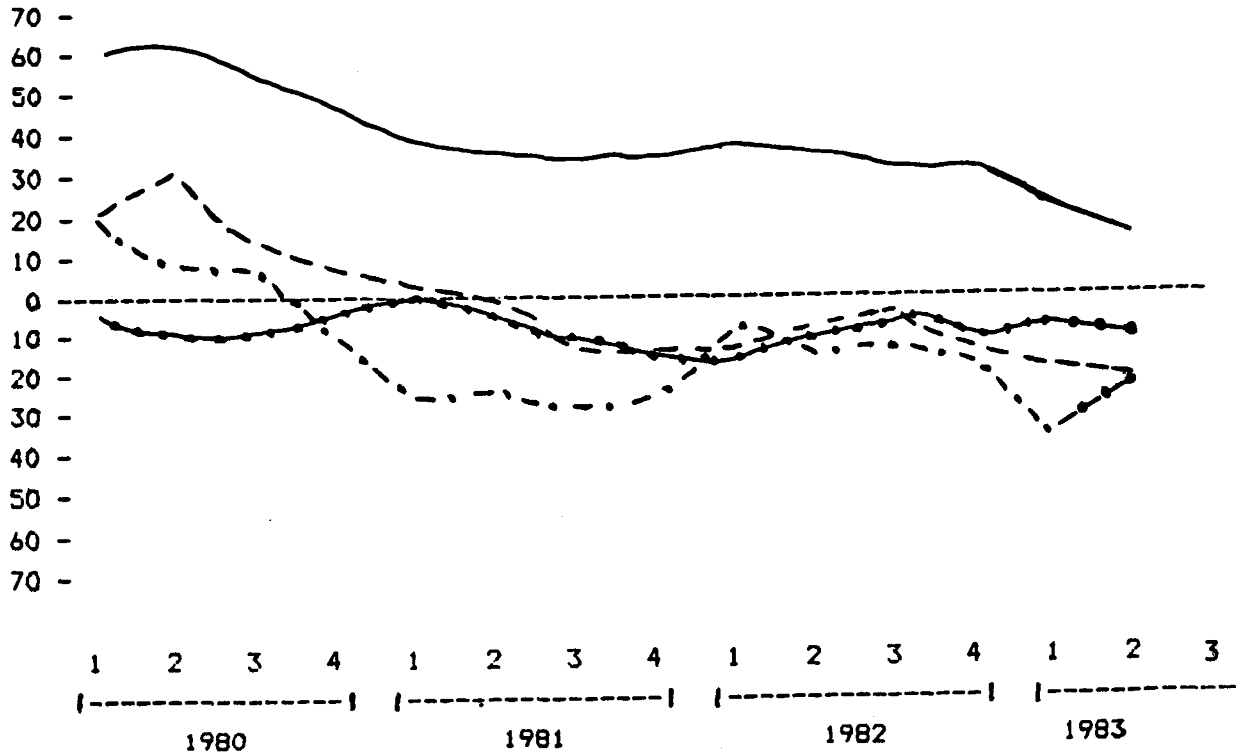
4.1.2. Forecasts

The expected fall in the level of activity in the first quarter of 1983 continued in the second quarter of 1983 (see figure 4.1., moving average forecast) and indicates a deepening recession.

Forecasts on the utilisation of total capacity on the Rhine for the second quarter of 1983 show a continuation of the drop. The forecasts of the utilisation of total capacity for the first and the second quarters 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 trend for coal and petroleum products for the first and second quarters of 1983.

On sand and gravel, shippers seem to be as pessimistic now as they were for the first quarter 1983. Indications from the specialised press seem to justify these expectations. On the other hand, the less pessimistic view for the transportation of ores for the second quarter 1983 compared with the first quarter 1983 seems not to find any basis in actual developments.

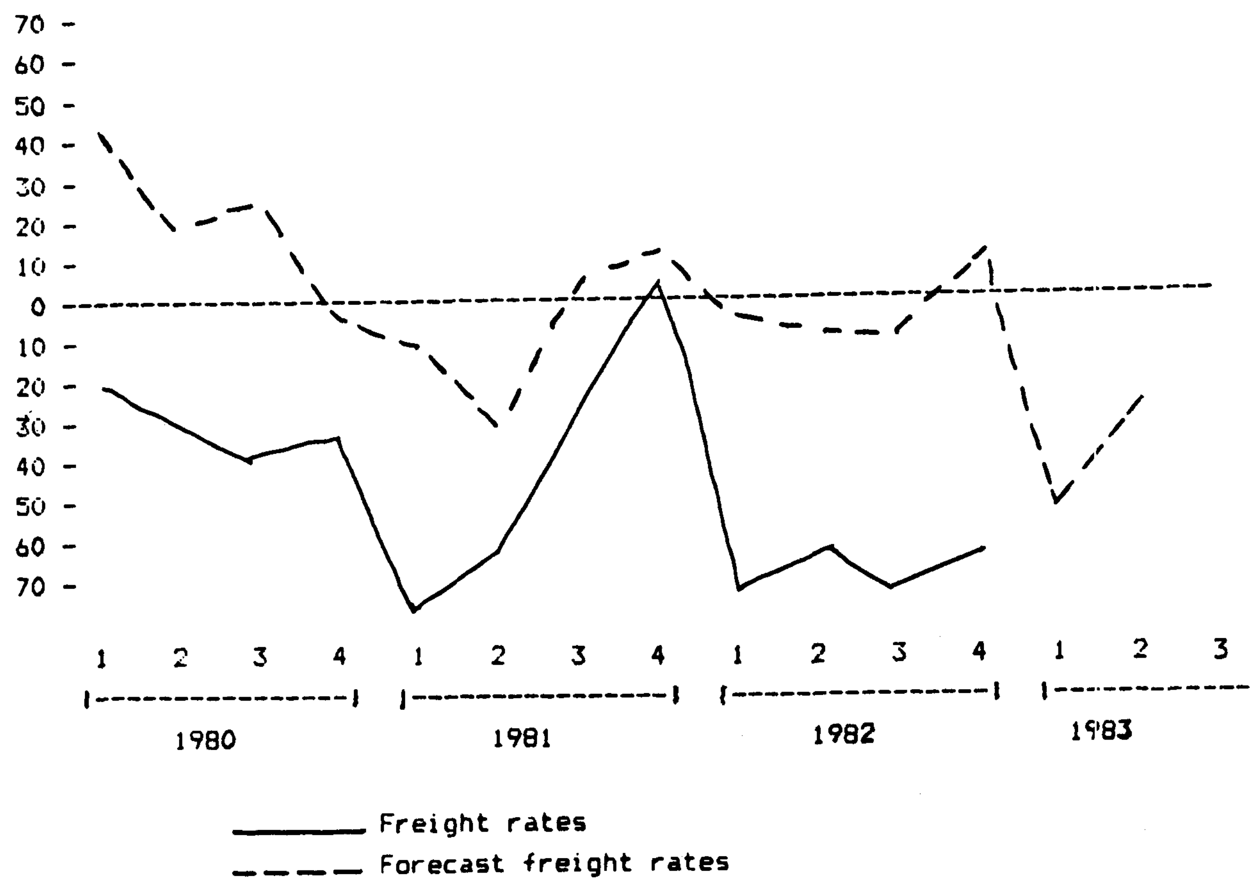
4.1.3. Freight rates

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

Although a continued drop in traffic is forecast for the first and second quarters 1983, it is expected that rates will go down in the first quarter 1983, and improve in quarter two.

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 first quarter of 1983 amongst Belgian and Dutch waterway transporters shows that activity is felt to be down against the fourth quarter 1982, and at about the same level as the first quarter 1982.

The balance of opinion during 1982 and Quarter 1, 1983, is:

1982				1983
Q1	Q2	Q3	Q4	Q1
-57	-28	-67	-43	-58

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 (difference in respective balances of opinion) by Dutch and Belgian shippers, Q1 over Q4 by bilateral relation.

From/To	B	F	NL
B	-12	-4	+2
F	+17		-18
NL	-8	-17	-4

Table 4.2. Changes in activity assessment by Dutch and Belgian shippers Q1 over Q4 by tonnage class.

Tonnage class	Belgian shippers	Dutch shippers	Total
200-450	-39	-36	-38
451-750	-5	+1	-1
751-1150	-20	-42	-28
1151-1500	+12	-4	+1
1501	=	-15	-7

The rare positive signs shown in Tables 4.1. and 4.2. merely reflect a relative improvement in a continuing depressed market.

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
	1983	13.0			
F	1981	8.5	7.0	15.3	14
	1982	9.2	18.0	16.1	13.2
	1983	20.9			
NL	1981	8.3	4.4	5.6	3
	1982	6.5	6.2	9.8	7.1
	1983	6.9			

* Domestic traffic included

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

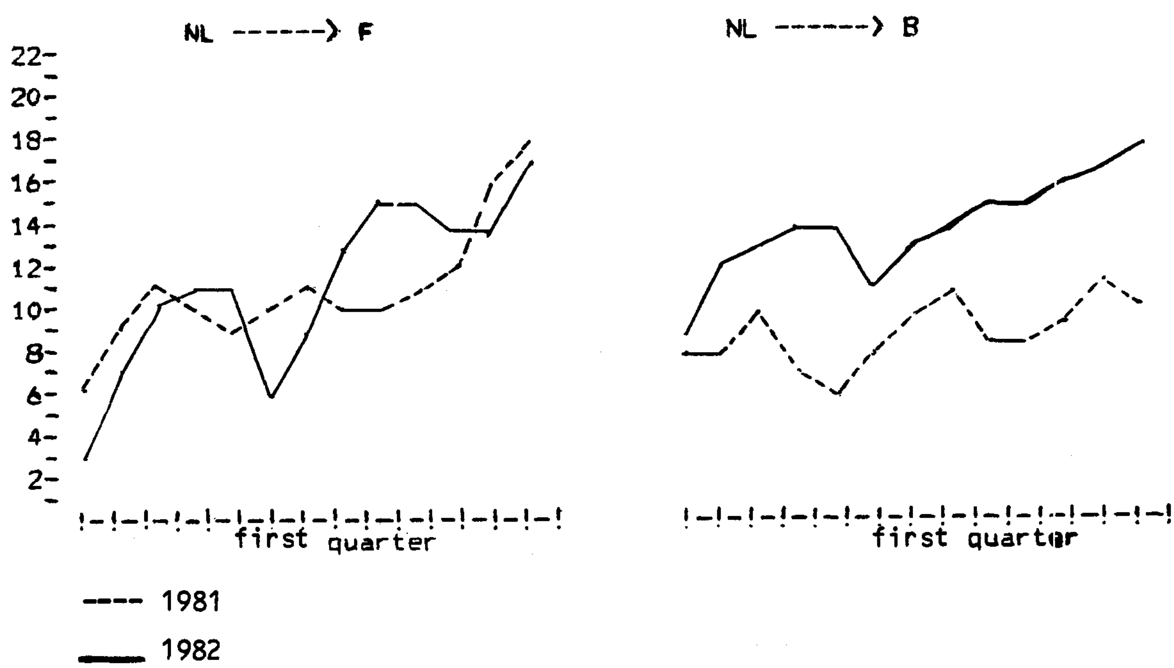


Figure 4.5. Weekly average of waiting days in North-South traffic, from Belgium to France, including Belgian domestic traffic, and from Belgium to the Netherland (bourse of Antwerp).

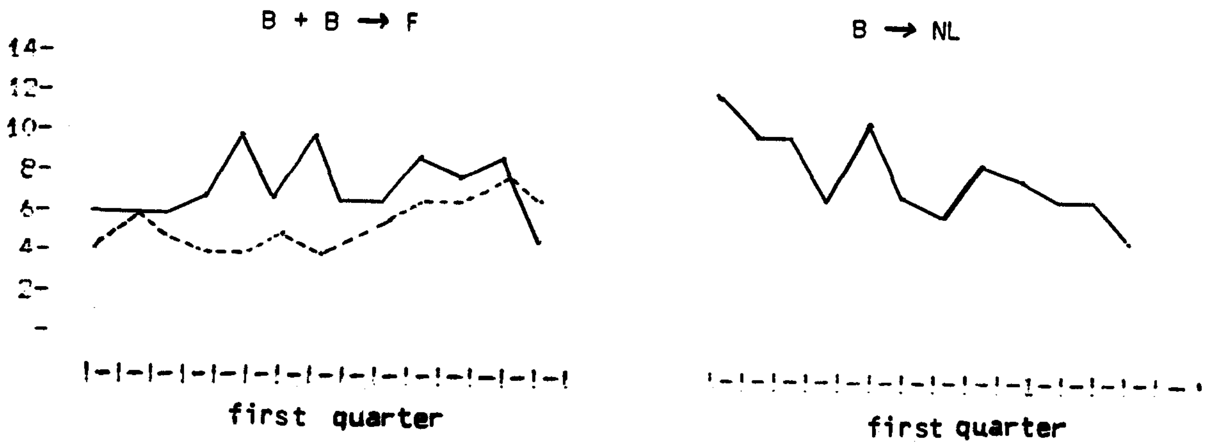
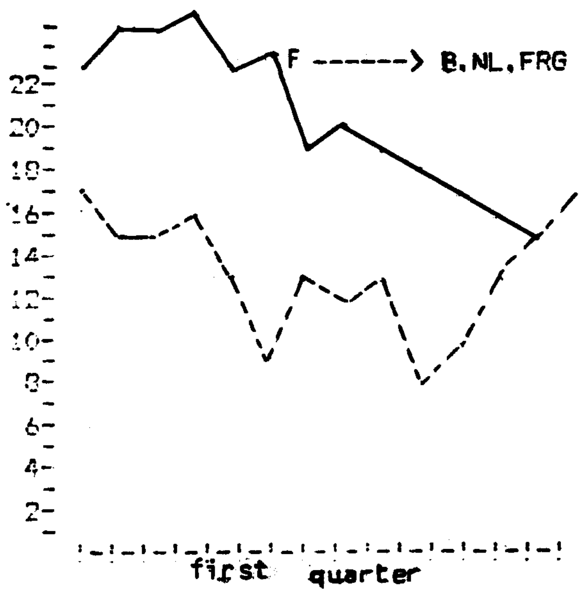


Figure 4.6. Weekly average of waiting days in North-South traffic from France.



In the relations Netherlands to France, and Belgium to France, the number of waiting days is only slightly up against the first quarter 1982. On the other hand, in the opposite direction, the number of waiting days has risen sharply. This reflects the present balance of trade situation of these countries.

Also in the relations Netherlands to Belgium, the number of waiting days has increased considerably.

Taken together, it could be stated that the number of waiting days is at the highest level in two years as far as The Netherlands and France are concerned. Only the Belgian market is maintaining itself rather well.

4.2.2. Border Crossings

The average number of border crossings by laden ships went down considerably for Dutch shippers and remained stable for Belgian shippers. This development, together with an increase of unladen border crossings for Dutch shippers and a decrease for Belgian shippers, confirms the earlier statement of the situation on these markets.

4.2.3. Prices

A stable two third 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 (-14 in quarter 1 as against -18 and -27 during the fourth and third quarters 1982 respectively).

4.2.4. Forecasts: continued depression

Forecasts by inland waterway transporters of the demand for transport services for the second quarter 1983 are in general much more pessimistic than those for the second quarter 1982 but less pessimistic than those for the previous quarter. The opinions of Belgian and Dutch shippers are showing the same tendency and are given in the following table.

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

	1982				1983	
Country / Quarter	Q1	Q2	Q3	Q4	Q1	Q2
B	-10	-23	-33	-40	-64	-52
N	-15	-8	-48	-6	-31	-24

Table 4.5. suggests that waterway transporters in Belgium and The Netherlands expect more negative developments on freight rates compared with the previous quarter and a small change in relation to the same quarter of 1982.

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

	1982			1983	
Country / Quarter	Q2	Q3	Q4	Q1	Q2
B	-10	-8	0	0	-6
NL	-12	-8	0	-10	-12

SECTION 5 : RAIL SURVEYS

5.1. Railway Price Indices

5.1.1. Coverage

Detailed studies have been carried out on price indices by three pilot networks (DB Germany, FS Italy and SNCF France) with the aim of constructing a method which is both reliable and, if possible, comparable with the methods used for the other two means of surface transport. The three railways agreed on the method described in section 5.1.2. The services of the Commission agreed to apply it on an experimental basis.

DB and SNCF have applied the method on the following links: Germany-France, France-Germany, France-Italy. FS will join the experiment in the near future. It is expected that SNCB (Belgium) and NS (Netherlands) will join for the last quarter of 1983.

5.1.2. Methodology

A "basket" of representative commodities was first defined for each directed relation from actual traffic data for the reference period (1981); the weight given to each commodity in the basket was determined from the corresponding revenue that would have arisen from the published tariffs in force on 31.12.1981.

In subsequent periods changes in the published tariffs for each commodity in the basket were noted and the revenue corresponding to the whole basket was recalculated; comparison of this revenue with the revenue in the base period gives the index.

In this report, receipts from the different railways have been converted into UIC francs at the rates in force on 31.12.81. As a result the evolution of the indices depends to a large extent on the relative weakness of the currencies concerned; this approach will be reviewed.

5.1.3. Price developments by relation

The evolution of price indices of rail transports carried out in complete loads was for:

France-Italy

31.12.81	31.3.82	30.6.82	30.9.82	31.12.82	31.3.83
100	100.16	107.49	110.36	118.08	124.18

Receipts on the French sector show an average increase of 21% since 31.12.81 (except wheat 14%), whereas those on the Italian sector show an increase of between 30-36%.

5.1.4. France-Germany

31.12.81	31.3.82	30.6.82	30.9.82	31.12.82	31.3.83
100	101.73	108.42	109.57	109.57	113.96

Except for maize and cars (tariff 9674) which show an 11-12% increase, the receipts on the German sector show an increase of 5-10%. The increase for the French sector of this relation is the same as for the France-Italy relation (21%). There was no change in the tariffs during the last quarter of 1982.

5.1.4. Germany-France

31.12.81	31.3.82	30.6.82	30.9.82	31.12.82	31.3.83
100	102.95	108.06	108.06	108.06	113.65

For the German sector there was an average increase of 5-9%, but 21-22% on the French sector. There was no change in the tariffs during the second half of 1982.

SECTION 6 : COMBINED TRANSPORT

These following comments 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. This includes rail and piggy-back companies (*).

6.1. Container Transport

The volume of border crossing rail container traffic in Europe noted by Intercontainer in the first quarter of 1983 was at the same level as in the fourth of 1982. The total number of units transported, 180.000 TEU, compares with 180.000 in the fourth quarter of 1982 and with 186.000 in the first quarter of 1982.

6.1.1. Maritime container traffic to and from the European container ports is 6% below the level of 12 months ago, but slightly above the fourth quarter 1982 result. Continental or inner European traffic with 65.700 TEU has increased by 11% compared to the previous year. Tank containers and swap-body traffics are both strong, and traffic with Greece and with Sweden has again increased. Container traffic overland between the Community and USSR (for the transsiberian route) has recovered after a poor 1982 thanks to train load movements of containers destined for the Peoples' Republic of China.

6.1.2. Intercontainer rail container rates being fixed for a one-year tariff period from July to June, there are no alterations to be reported at the moment. The price competition remains severe in all markets. The out-look for 1983 remains unchanged. Total international rail container traffic is expected to be as in 1982, the subdued level of maritime business being compensated by continued steady growth of intra-European continental traffic. A greater flexibility with rates is not expected during the year.

(*) International Union of Combined Rail-Route Transport Companies

Germany	:	KOMBIVERKEHR
Netherlands	:	TRAILSTAR
Belgium	:	T.R.W.
Spain	:	TRANSNOVA
France	:	NOVATRANS
Switzerland	:	HUPAC
Italy	:	CEMAT and FEPAX

6.2. Piggyback Transport

The more detailed information received since the last quarterly report confirms the trend towards a slowing down of the overall growth rate.
The information given is the number of units despatched by the "organising" company, i.e. the number of semi-trailers, swap bodies or road trains carried by rail wagons.

6.2.1. International traffic by companies based in the Community

Country of Despatch		Units despatched	% change from	
		Q4/82	Q3/82	Q4/81
Kombiverkehr	D	11.686	9	-9
Novatrans	F	1.963	-30	10
	I (except to D)	4.733	-6	-1
	UK	1.355	-14	-3
Ferpac	I (to D)	2.118	4	18
Trailstar	NL	1.246	18	5
TRW	B	3.004	13	1
	TOTAL	26.105	1	-2

While there has been a small increase in total traffic since the third quarter of 1982, experience varies considerably from one company to another. Novatrans has suffered serious losses on almost all relations while results for other companies continue positive.

Comparisons with the fourth quarter of 1981 are less satisfactory with an overall decline of 2%; there is considerable variation between companies.

6.2.2. Important intra-Community relations (over 1000 units in Q4/82)

Relation	Units despatched Q4/82	% change from Q3/82	% change from Q4/81
D → I	5.113	13	-5
F → I	1.671	7	8
I → F	1.543	6	-1
I → UK	1.522	-20	-2
I → B	1.668	-1	1
I → D	2.118	4	18
UK → I	1.321	-16	-2
NL → I	1.009	22	9
B → I via F	2.160	18	2
TOTAL	18.125		

The most evident recent trend is the sharp increase in traffic by all companies to Italy (except from the United Kingdom).

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	Εθνική Στατιστική Υπηρεσία
IRL	Central Statistical Office
I	Centro Studi sui Sistemi di Trasporto
L	Service central de la Statistique et des Etudes économiques
NL	Economisch Bureau voor het Weg- en Watervevoer
UK	Department of Transport

b) Road Cost 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 (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

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

e) Rail Price Indices

D	DB (Deutsche Bundesbahn)
F	SNCF (Société nationale des Chemins de fer)
I	FS (Azienda autonoma delle Ferrovie dello Stato)

f) Combined Transport

Intercontainer (container transport)
Interunit (piggyback transport)

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