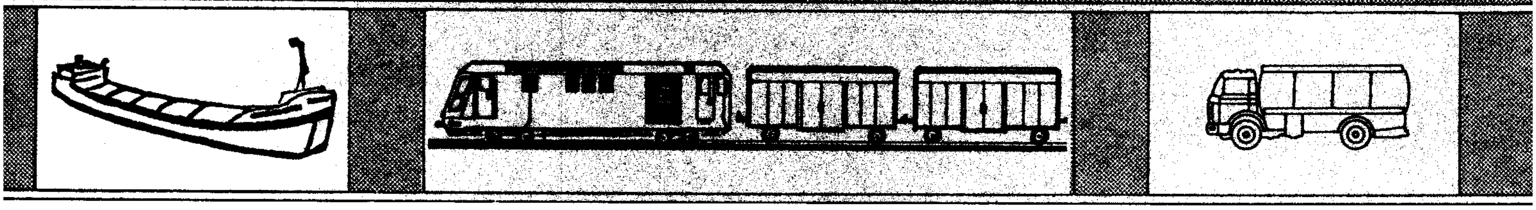
EUROPEAN COMMUNITIES

EUROPA TRANSPORT



OBSERVATION OF THE TRANSPORT MARKETS

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 overall situation in international inland transport in the first quarter of 1983 is not much improved on the previous two quarters. Rail dropped heavily again, but did not quite reach the all time low recorded in the third quarter of 1982. Inland waterways improved significantly, only a half percent down on the corresponding quarter of 1982. Road, still performing much better in relation to the other two modes, continued the improvement begun in the previous quarter and returned a figure of +3.6% in the first quarter of 1982. Indications are that road will sustain or even improve on this figure in the second quarter of 1983.

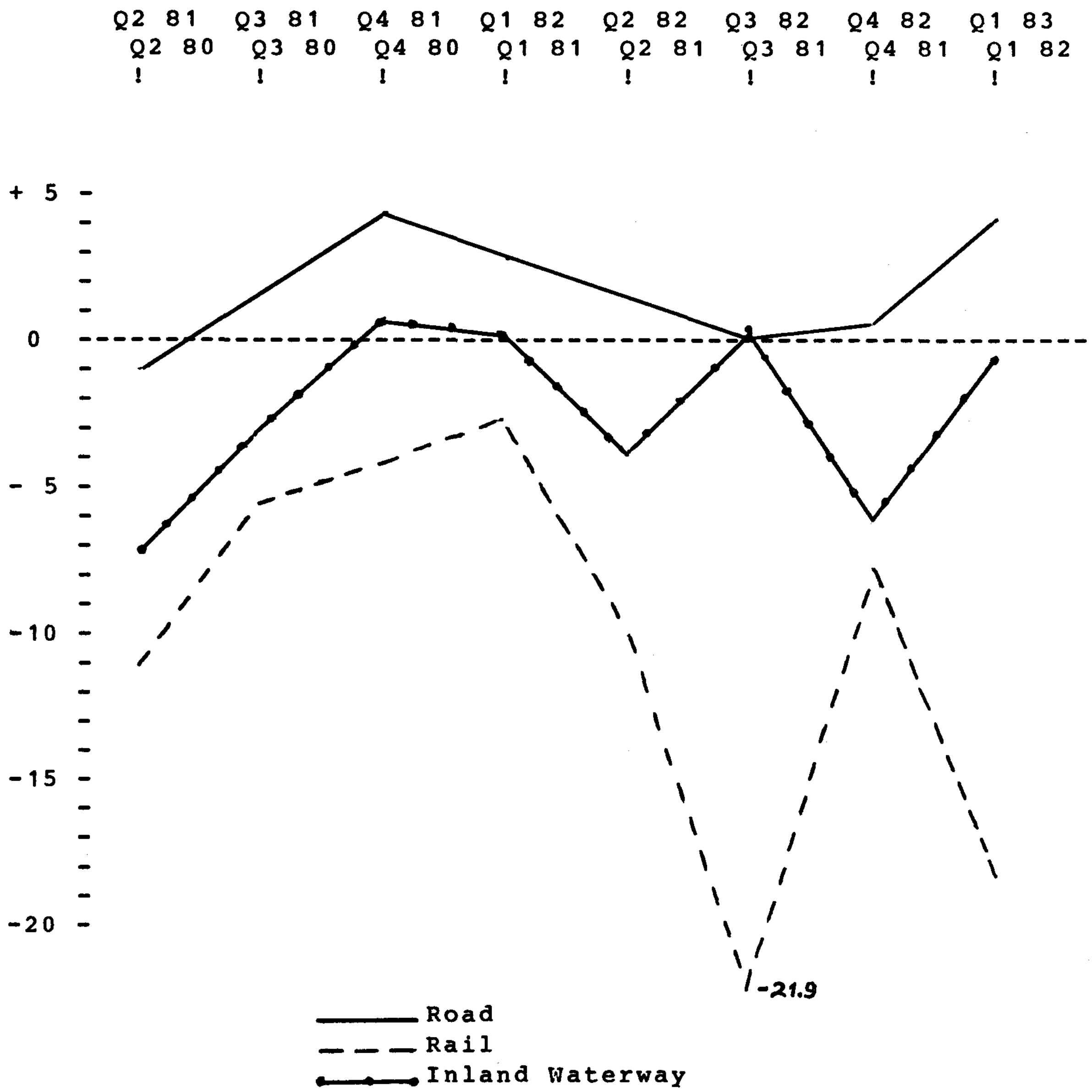
SECTION 2

GENERAL MARKET ASSESSMENT

2.1. Recent trends

The total tonnage moved for all three modes in the first quarter of 1983 was down 1.7% on the same quarter of the previous year. Road was positive, inland waterways just negative and rail suffered very badly.

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	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	Q1 83 / Q1 82
Road	-1.0	+2.0	+4.2	+2.9	+1.3	0.0	+0.4	+3.6
Rail	-11.1	-5.7	-4.6	-2.7	-10.2	-21.9	-7.8	-18.3
I.W.	-7.1	-3.0	+0.8	+0.1	-3.9	+0.1	-6.7	-0.5
Total	-5.6	-1.6	+1.2	+0.6	-3.0	-3.1	-4.1	-1.7

2.1.2. Modal split

In the first quarter of 1983, road and inland waterways increased their respective shares at the expense of rail.

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

Mode	Q1 83	Q1 82	% Change	Modal share
Road	38.3	36.9	+3.6	40.8
Rail	13.5	16.3	-18.3	14.4
I.W.	42.0	42.2	-0.5	44.8
Total	93.8	95.4	-1.7	100

2.2. Modes

2.2.1. Road

Another good quarter for road transport, 3.6% up on quarter one 1982. France, in particular, returned very good figures, only the traffic to Germany showing a drop.

(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.

2.2.2. Rail

Yet another bad quarter's figures for this mode, which has failed to maintain the relative improvement noted in the last quarter of 1982. Germany was again down more than 20% on the corresponding quarter of the previous year, with Italy returning even worse figures. Belgium/Luxembourg is also nearly 10% down on the first quarter of 1982, in contrast to the positive figure achieved in the fourth quarter of last year.

2.2.3. Inland Waterways

This mode made a significant recovery in relation to the previous quarter, just half a percent down on the first quarter of 1982, mainly because of bad figures from Germany. The relation with the highest volume of traffic, Netherlands to Germany, showed a drop of 11%.

2.3. United Kingdom, Ireland and Greece

2.3.1. United Kingdom

Road goods vehicle units carried on Ro/Ro ferries to mainland Europe during the first quarter of 1983 amounted to 185,600, some 8.2% up on the first quarter of 1982 and over 4% higher than the preceding quarter. Powered vehicles accounted for 51% of the total, a slight increase in both the the previous quarter (50%) and the first quarter of 1982 (49%). Nearly 51% of the powered vehicles were UK registered.

2.3.2. Ireland

The Irish freight market continues to be depressed. For the first quarter of 1983, in both the refrigerated and dry goods sections, traffic was down on the previous quarter and on the corresponding quarter of 1982. The United Kingdom's share of Ro/Ro (exports and imports) continues at around one third of the total, while France appears to have increased its share of the market on both imports and exports. Low market rates and a surplus of haulage capacity are likely to ensure that there will be no improvement in market conditions in the short term.

2.3.3. Greece

Road figures dropped by over 14% in the first quarter of 1983, in comparison to the first quarter of 1982. This was chiefly due to a drop of over 20% in the traffic from Germany, which is the most important relation for Greece. French figures were also down considerably.

2)

SECTION 3

ROAD

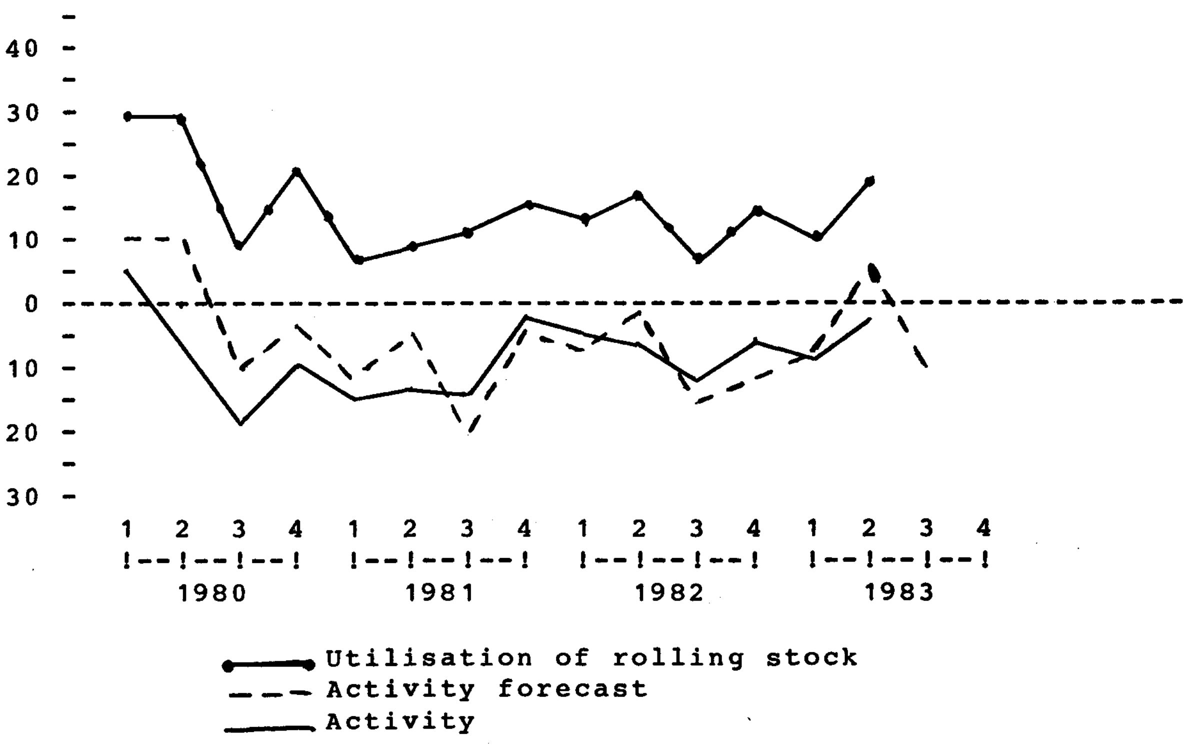
3.1. Road Inquiry Survey

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

Road transport improves

The inquiry for the second quarter of 1983 indicates an improvement in the level of activity on the previous quarter. The improvement seems to more than cancel out the seasonal decline of the first quarter the year before.

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



3.1.2. Activity : Increase

For the second quarter of 1983, the balance of opinion (percentage difference between positive and negative replies) increased by 9 points (from -11% to -2%) in comparison with the previous quarter.

3.1.3. Forecasts : Negative expectation

The forecast for the third quarter results from downward expectations on activity by -8 point (from -2 to -10), but the level is still 4 points higher than in the same quarter of last year.

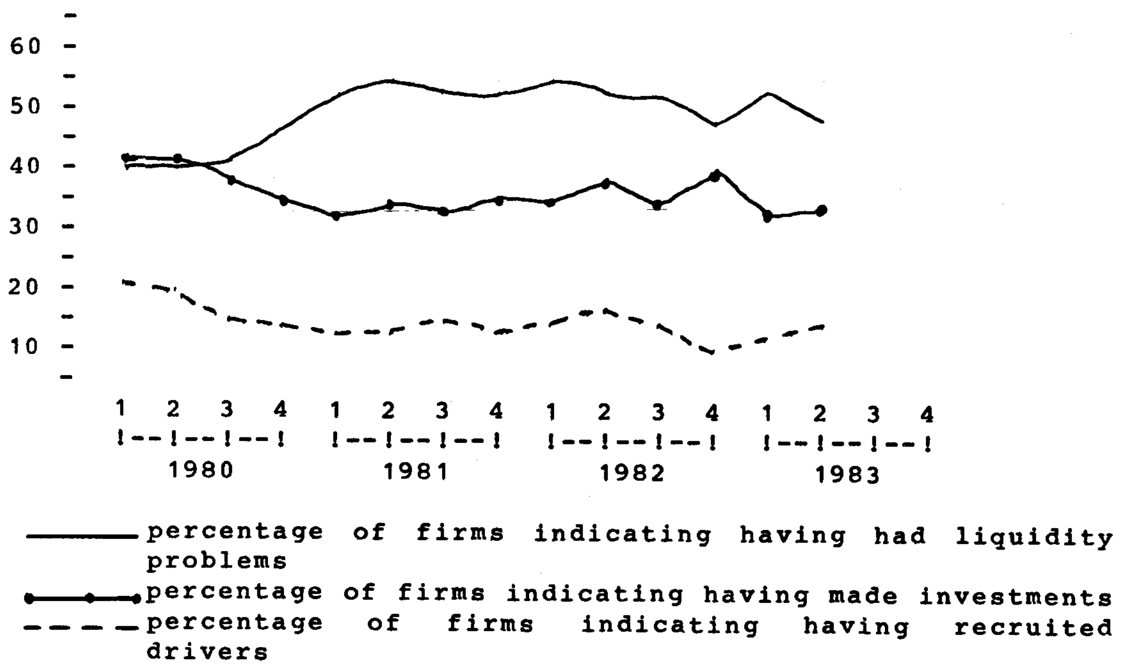
3.1.4. Utilisation of rolling stock

The overall opinion is positive with an increase of 8 points (from 11% to 19%). The balance of opinion is strongly positive in the UK (58%), the Netherlands (56%) and Belgium (47%). It is negative in Italy (-3%), France (-5%) and Greece (-20%).

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

For all three economic indicators there appears to have been an improvement in comparison to the first quarter.

Figure 3.2.: Economic Indicators



3.1.6. Recruitment : Upswing goes on

The percentage of firms having recruited drivers is 2 points higher than the previous quarter and now stands at 15%. The highest recruitment levels are noted for Luxembourg (35%), the UK (26%), Italy (25%) and the Netherlands (25%).

3.1.7. Cash-flow problems : Status quo

At 51% the percentage of firms having cash-flow problems remained practically unchanged compared to the previous quarter. French (65%), Italian (76%), Irish (55%) and Greek (68%) hauliers are facing severe problems.

3.1.8. Investments : Marginal improvement

The proportion of firms investing has increased from 33% to 35%. In the UK (67%) and Denmark (51%) the majority of hauliers has invested.

Table 3.1.

ECT-0310		INTERNATIONAL TRANSPORT BUSINESS ACTIVITY												2nd quarter 1983 Forecast: 3rd 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	24	10	
	=	56	54	45	51	46	54	48	49	49	55	44	44	48	45	64	
	-	24	28	40	33	34	28	33	31	29	26	38	33	29	31	26	
	S	-4	-10	-25	-17	-14	-10	-14	-11	-7	-7	-20	-10	-6	-7	-16	
FRANCE	+	30	22	18	14	16	14	16	21	18	15	14	15	14	15	9	
	=	48	51	50	49	41	47	47	47	47	49	50	43	43	49	52	
	-	22	27	32	37	43	39	37	32	35	36	36	42	43	36	39	
	S	8	-5	-14	-23	-27	-25	-21	-11	-17	-21	-22	-27	-29	-21	-30	
ITALIA	+	20	25	16	14	15	15	17	18	15	16	14	15	14	15	17	
	=	53	45	44	41	41	44	42	53	49	47	41	51	45	54	60	
	-	27	30	40	45	44	41	41	29	36	37	45	34	41	31	23	
	S	-7	-5	-24	-31	-29	-26	-24	-11	-21	-21	-31	-19	-27	-16	-6	
NEDERLAND	+	31	23	13	34	30	20	25	26	34	32	26	31	31	37	13	
	=	39	55	44	45	41	65	49	52	43	45	41	50	44	44	58	
	-	30	22	43	21	29	15	26	22	23	23	33	19	25	19	29	
	S	1	1	-30	13	1	5	-1	4	11	9	-7	12	6	18	-16	
BELGIQUE-BELGIE	+	29	27	19	25	25	28	22	31	28	31	23	30	27	28	15	
	=	48	49	39	47	46	41	43	44	48	51	43	47	46	51	58	
	-	23	24	42	28	29	31	35	25	24	18	34	23	27	21	27	
	S	6	3	-23	-3	-4	-3	-13	6	4	13	-11	7		7	-12	
LUXEMBOURG	+	24	21	13	27	25	27	12	26	28	26	21	25	21	35	21	
	=	60	66	44	43	46	49	51	61	48	50	51	47	52	49	45	
	-	16	13	43	30	29	24	37	13	24	24	28	28	27	16	34	
	S	8	8	-30	-3	-4	3	-25	13	4	2	-7	-3	-6	19	-13	
UNITED KINGDOM	+			16	28	23	21	24	28	28	25	21	24	23	24	20	
	=			42	46	49	53	56	59	59	56	63	64	61	63	69	
	-			42	26	28	26	20	13	13	19	16	12	16	13	11	
	S			-26	2	-5	-5	4	15	15	6	5	12	7	11	9	
IRELAND	+		26	41	26	18	24	21	25	21	27	20	28	21	23	34	
	=		29	35	46	30	47	39	40	48	39	38	37	47	50	60	
	-		45	24	28	52	29	40	35	31	34	42	35	32	27	6	
	S		-19	17	-2	-34	-5	-19	-10	-10	-7	-22	-7	-11	-4	28	
DANMARK	+	34	27	19	26	24	20	21	24	25	26	17	27	26	19	13	
	=	58	57	54	57	57	65	61	61	65	64	61	62	66	65	75	
	-	8	16	27	17	19	15	18	15	10	10	22	11	8	16	12	
	S	26	11	-8	9	5	5	3	9	15	16	-5	16	18	3	1	
HELLAS	+								27	16	14	17	28	19	32	25	
	=								47	45	31	34	36	39	39	43	
	-								26	39	55	49	36	42	29	32	
	S								1	-23	-41	-32	-8	-23	3	-7	
E.E.C.	+	26	23	17	21	20	19	20	24	22	21	19	23	21	24	15	
	=	51	51	45	48	44	50	47	50	50	50	46	49	48	50	60	
	-	23	26	38	31	36	31	33	26	28	29	35	28	31	26	25	
	S	3	-3	-21	-10	-16	-12	-13	-2	-6	-8	-16	-5	-10	-2	-10	

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

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

Table 3.4.

ECT-0340	LIQUIDITY PROBLEMS — Percentage of firms indicating having had liquidity problems														2nd quarter 1983	
	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	62	31	26		
FRANCE	52	54	53	61	67	66	64	61	64	60	60	57	64	65		
ITALIA	49	57	53	64	65	72	70	70	72	76	69	70	76	76		
NEDERLAND	20	16	23	17	19	16	18	15	18	12	11	10	13	6		
BELGIQUE-BELGIE	26	25	27	29	27	39	28	32	32	27	26	31	27	26		
LUXEMBOURG	26	20	34	21	63	15	43	27	57	38	40	42	27	16		
UNITED KINGDOM			54	58	64	57	57	51	56	49	53	50	49	44		
IRELAND		85	57	62	79	59	53	51	58	58	50	59	59	55		
DANMARK	14	14	24	19	26	23	31	29	32	21	32	18	20	19		
HELLAS								63	54	76	79	69	72	68		
E.E.C.	39	40	41	46	53	53	51	50	53	49	49	49	50	49		

Table 3.5.

ECT-0350	INVESTMENT — Percentage of firms indicating having made investments												2nd quarter 1983			
PAYS	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	44		
FRANCE	39	39	35	30	31	30	27	34	34	35	31	42	29	29		
ITALIA	33	39	35	34	26	29	26	27	26	25	21	20	18	24		
NEDERLAND	52	41	41	40	38	44	36	47	46	42	43	46	41	47		
BELGIQUE-BELGIE	39	38	35	34	30	36	30	29	30	39	32	38	42	40		
LUXEMBOURG	50	42	32	26	17	22	21	33	26	29	28	47	38	20		
UNITED KINGDOM			48	57	30	52	50	49	53	63	61	67	49	67		
IRELAND		33	38	46	28	27	30	29	25	22	27	19	31	24		
DANMARK	57	70	43	32	35	39	44	40	43	45	35	42	43	51		
HELLAS								46	33	42	24	29	42	34		
E.E.C.	41	42	36	34	31	33	31	34	33	36	32	38	33	35		

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 and Greece. UK results have been received, but as yet, not the cost structures. The German and the Dutch surveys give a breadkdown of the cost factors by geographical relations. In the near future, it is expected that belgian and french surveys will also give this breakdown.

The figures for the first half year 1983 given below are provisional and they do not include Denmark.

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. as well as in figures 3.4. and 3.5.

3.2.3. Overall costs developments : First half of 1983

Total cost continued increasing remarkably in national currency for France (7,3%) and slightly for Germany (0,1%) and Belgium (0,2%) while a decrease of 1,6% is noted for the Netherlands.
In ECU an increase varying between 0,9% and 1,5% for Belgium/Luxembourg, Germany and France while a decrease of 2,5% is noted in the Netherlands.
The German and Dutch surveys give a breakdown of the total costs by geographical relations. In the German survey, in national currency, a decrease between 0,1% and 0,7% is noted except for Italy where there is an increase of 0,8%.
In the Dutch survey, in national currency, we remmark a decrease for all Member States varying between 1,0% (France) and 2,3% (Italy).

3.2.4. Fuel cost developments : First half of 1983

For the first half of 1983, fuel costs in national currency decreased in Germany, the Netherlands and United Kingdom. They increased by 1,3% in Belgium while in France we noted a small increase of 0,4%.
In ECU, we noted a decrease for Germany, France and the Netherlands, a slight increase of 0,2% for Belgium/Luxembourg and a rather remarkable one of 5,5% for United Kingdom.

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	1.7.83
Germany	(DM)	57,6	57,5	74,1	86,5	93,6	100,0	96,8	99,1	91,4
France	(FF)	46,9	53,1	66,5	86,2	95,1	100,0	108,2	117,2	117,6
Netherland	(HFL)	55,4	57,0	77,0	86,0	94,4	100,0	99,4	99,0	91,9
B/L	(BFR)	45,5	47,7	66,9	78,9	90,0	100,0	102,2	105,4	106,7
U.K.	(UKL)		49,8	70,7	82,6	102,4	100,0	102,4	111,5	110,7
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	1.7.83
Germany	54,3	56,0	72,7	81,9	90,7	100,0	100,2	105,5	98,3
France	50,3	57,2	70,9	89,8	98,6	100,0	102,3	111,8	106,8
Netherland	53,4	56,3	75,1	82,3	90,1	100,0	101,7	105,3	96,7
B/L	47,1	50,1	68,9	79,1	90,7	100,0	94,4	97,3	97,5
U.K.	44,4	41,5	62,7	87,4	105,0	100,0	104,8	103,3	108,8
Denmark				78,5	98,6	100,0	97,7	116,6	

Table 3.8. : Total 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	1.7.83
Germany	(DM)	75,8	79,6	86,3	94,6	98,8	100,0	102,3	102,4	102,5
France	(FF)	56,9	64,5	73,0	86,3	94,8	100,0	108,5	113,8	121,1
Netherland	(HFL)	75,2	77,9	86,6	92,5	96,4	100,0	101,1	102,5	100,8
B/L	(BFR)	67,7	71,6	79,6	88,8	93,6	100,0	105,6	109,0	111,2
U.K.	(UKL)									
Denmark	(DKR)				88,3	95,1	100,0	102,5	111,6	

Table 3.9.: Total 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	1.7.83
Germany	71,4	77,5	84,7	89,6	95,8	100,0	105,9	109,0	110,2
France	61,2	69,5	77,8	89,8	98,2	100,0	102,6	108,5	110,0
Netherland	72,4	77,1	84,5	88,3	92,1	100,0	103,8	108,6	106,1
B/L	70,0	75,2	82,0	89,1	94,3	100,0	97,5	100,7	101,6
U.K.									
Denmark				88,8	96,1	100,0	100,1	110,2	

Figure 3.3.

FUEL COSTS IN ECU

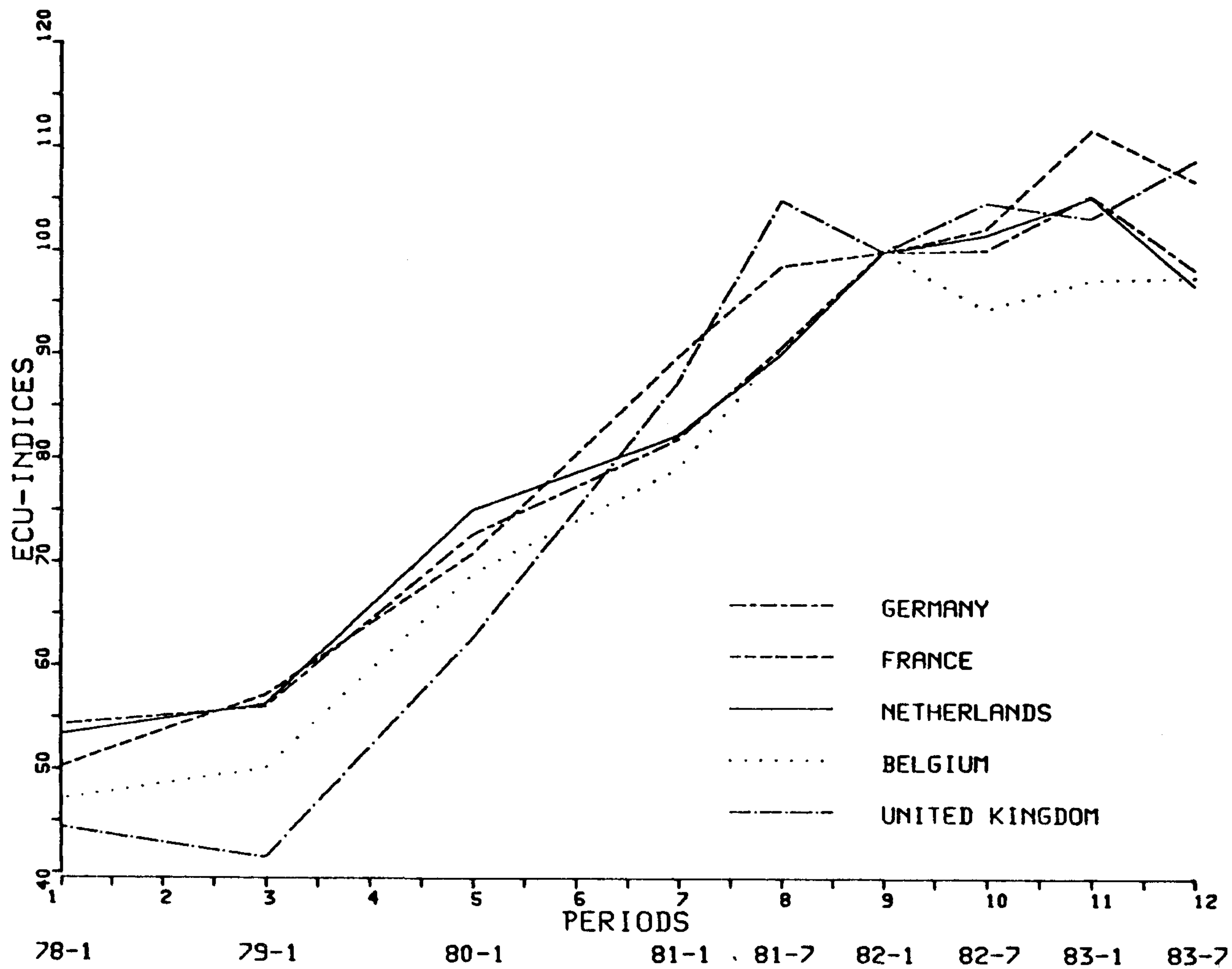


Figure 3.4.

TOTAL COSTS IN ECU

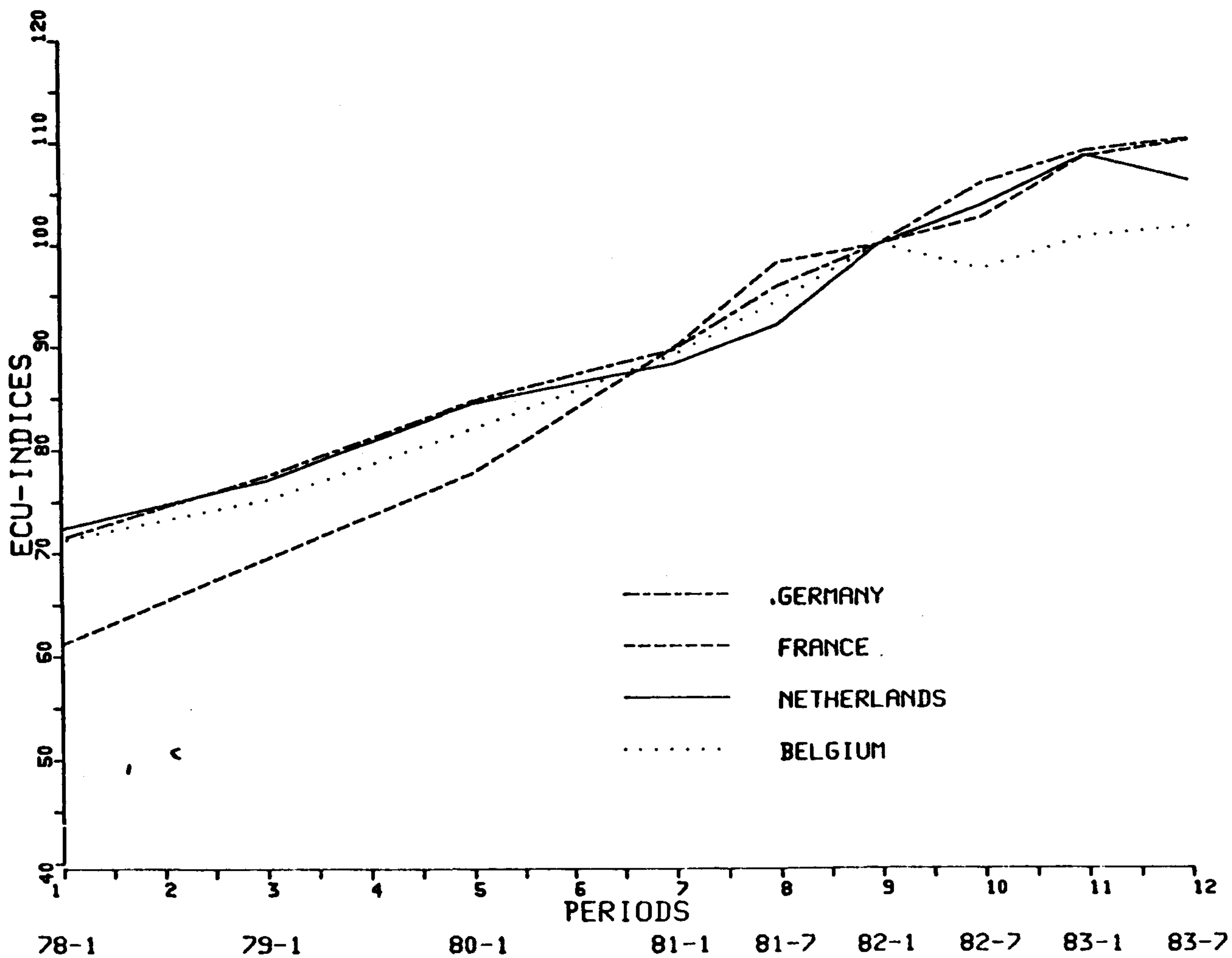
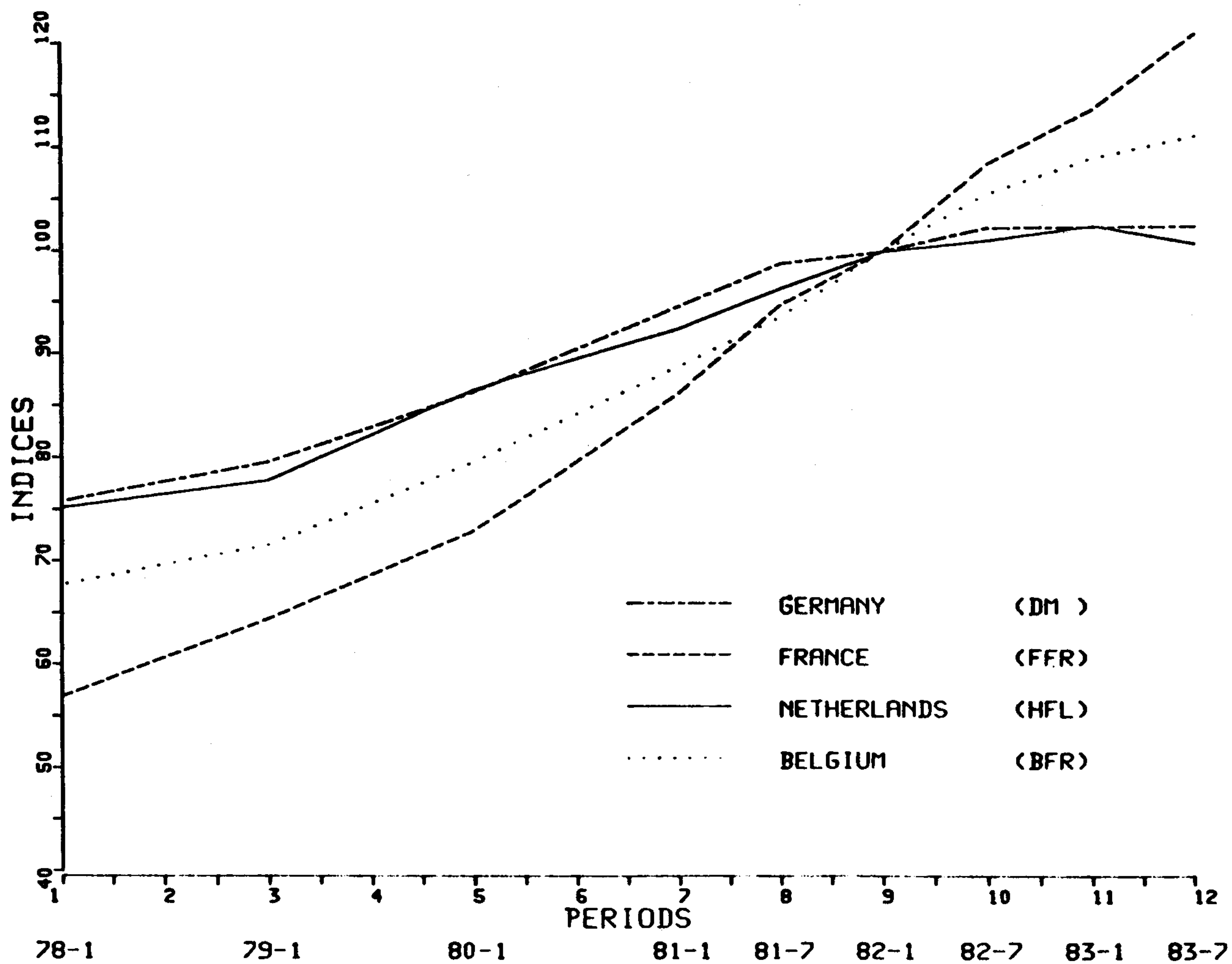


Figure 3.5.

TOTAL COSTS IN NATIONAL CURRENCY



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 first quarter of 1983. The relationships of Italian hauliers to all Member States are only up to the fourth 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) rose by 2.5% for French hauliers but showed small falls (less than 1%) for German and Dutch hauliers. In the case of Belgium hauliers average prices fell nearly 3% following a 5% rise in the previous quarter.
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.

German hauliers

Average prices (in ECU) on every relations have increased by just over 2% since the fourth quarter of 1982, but in national currency there was a small drop of 0.2% .

French hauliers

In the first quarter of 1983, the average prices (in ECU) varied between the different relations. To Germany they increased 2.3%, while to Italy there was a considerably increase of 7%. For relations with Belgium/Luxembourg and the Netherlands the change was less than 0.5%. Average prices in ECU increased overall by 3.4% but in national currency only 2.5%.

Italian hauliers

Data for the first quarter of 1983 have not yet been received. Analysis of results will be incorporated in the following report.

Dutch hauliers

Average prices (in ECU) on all relations show very small increases; 0.3% with Germany, 0.5% with France and 0.4% to Italy.
Overall average prices have increased by 0.4% but in national currency there was a decrease of 0.8%. Data for the relation with Belgium/Luxembourg has not yet been received.

Belgium/Luxembourg hauliers

Data for the previous quarter were received late so that the analysis in this report will cover the fourth quarter of 1982 and first quarter of 1983. Average prices (in ECU) with Germany and the Italy increased sharply from the third to the fourth quarter of 1982 9.1% and 1.6% respectively. However, in the relations with France and the Netherlands the changes were marginal.
Overall prices (in ECU) rose 3.3% (4.1% in national currency).
On the contrary, in the first quarter of 1983 the average prices (in ECU) to Germany and Italy decreased by 1.0%, and 4.6% respectively while to France and the Netherlands they increased by 0.8% and 6.7% respectively.
Overall prices (in ECU) fell by 0.2% (1.7% in national currency).

Figure 3.6: EFFECTS OF CHANGES IN EXCHANGE RATES

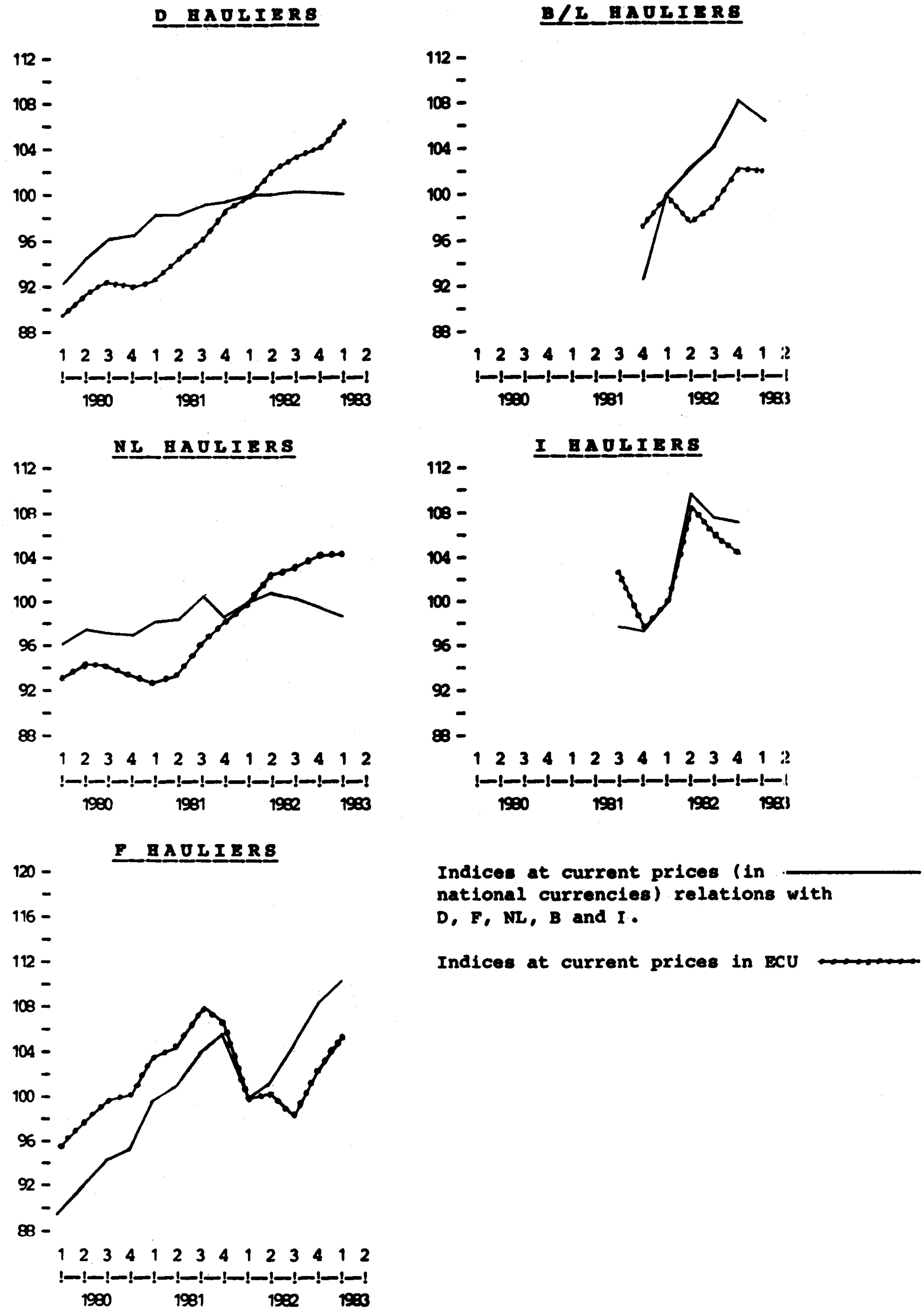


Figure 3.7: PRICE DEVELOPMENT IN RELATIONS BETWEEN D, F, NL, B(L)

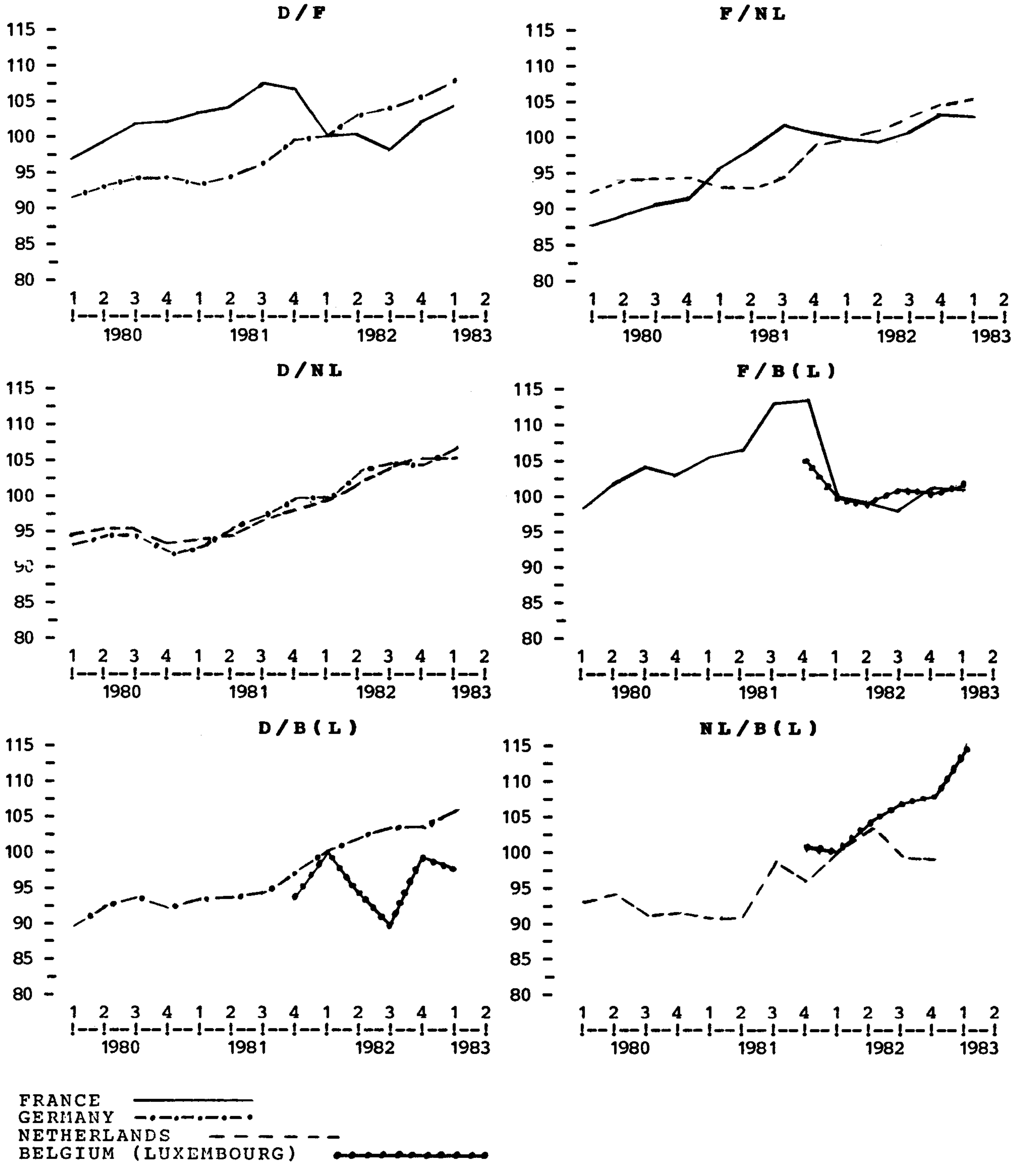
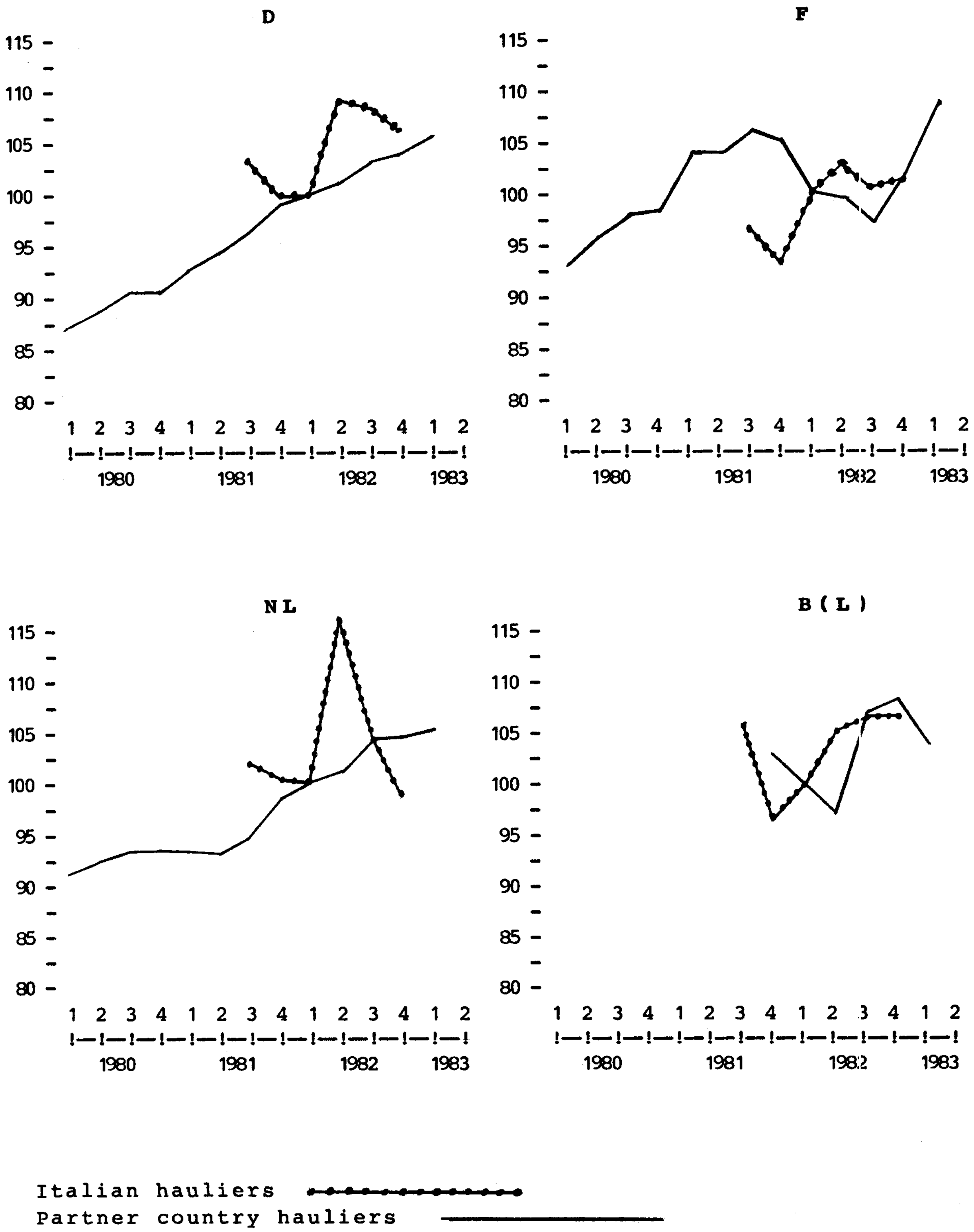


Figure 3.8: PRICE DEVELOPMENT IN RELATIONS WITH ITALY



SECTION 4

WATERWAY SURVEYS

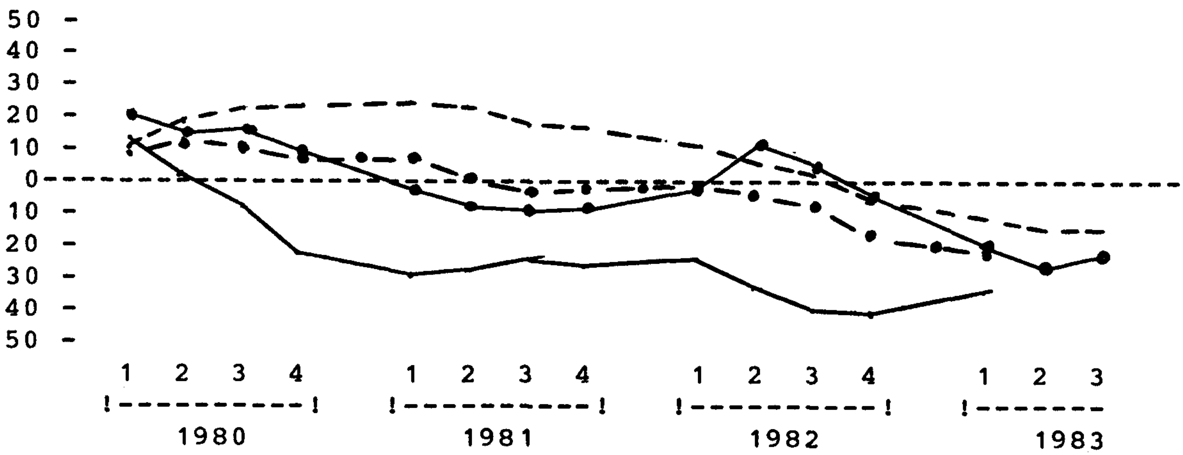
4.1. Rhine traffic

4.1.1. Activity

In the opinion of shippers surveyed the level of activity for the first quarter 1983 will be worse than that of the first quarter 1982. However, the regression seems to have come to a stop now. Consequently, the moving average (calculated on the balance of opinion for the last four quarters) shows an increase 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)



—— 4 quarter moving average actual activity
—— 4 quarter moving average forecast activity
·—·— 4 quarter moving average actual utilisation of capacity
– – – 4 quarter moving average forecast utilisation of capacity

The downward tendency in the fourth quarter 1982 turned into a more optimistic view about the level of activity in the first quarter 1983. The specialised press indicates a continued overcapacity with the exception of the tanker sector where at certain moments the fleet was utilised at its maximum. The moving average of the actual utilisation of capacity shows a further down-turn in the first quarter 1983.

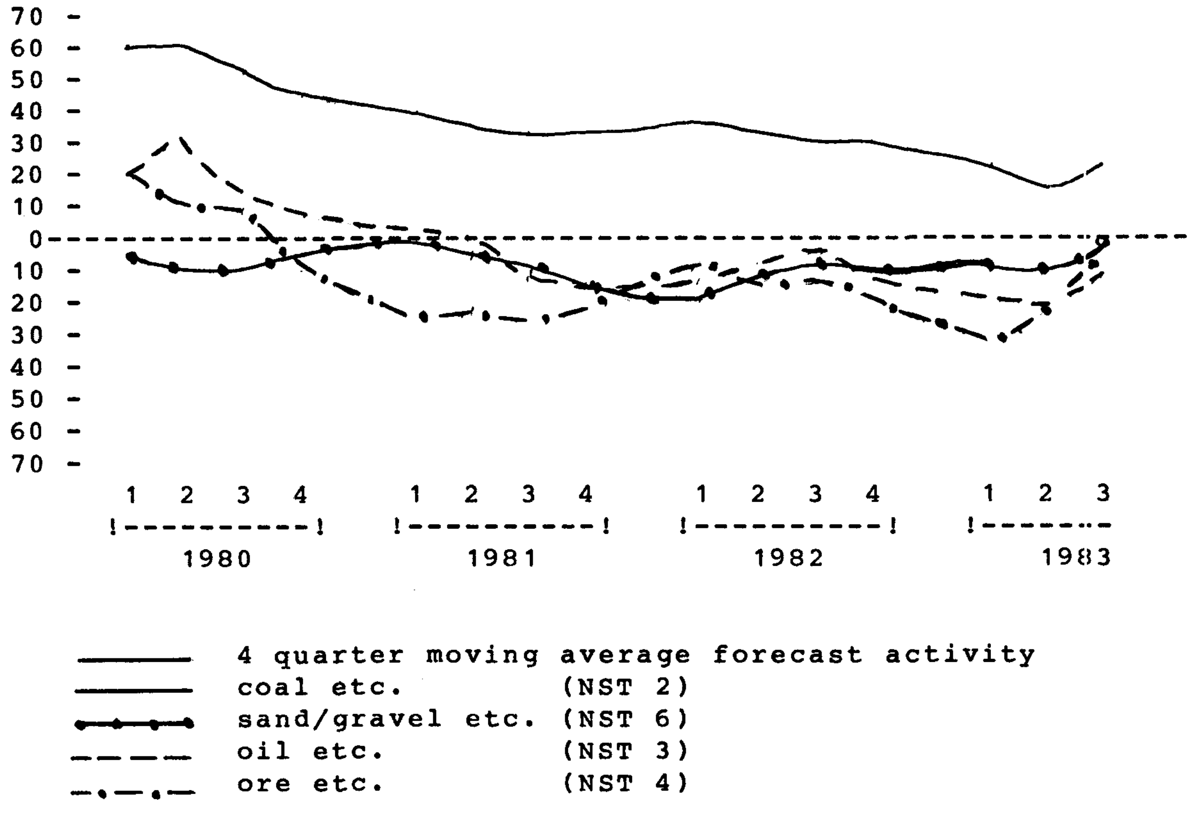
4.1.2. Forecasts

The expected fall in the level of activity in the second quarter of 1983 is not expected to continue in the third quarter of 1983 (see figure 4.1., moving average forecast). The activity indicates a slight recovery.

Forecasts on the utilisation of total capacity on the Rhine for the third quarter of 1983 show an upward trend. The forecasts of the utilisation of total capacity for the second and third 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)



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 an upward trend for the third quarter of 1983. Shippers seem to be less pessimistic than they were for the second quarter 1983.

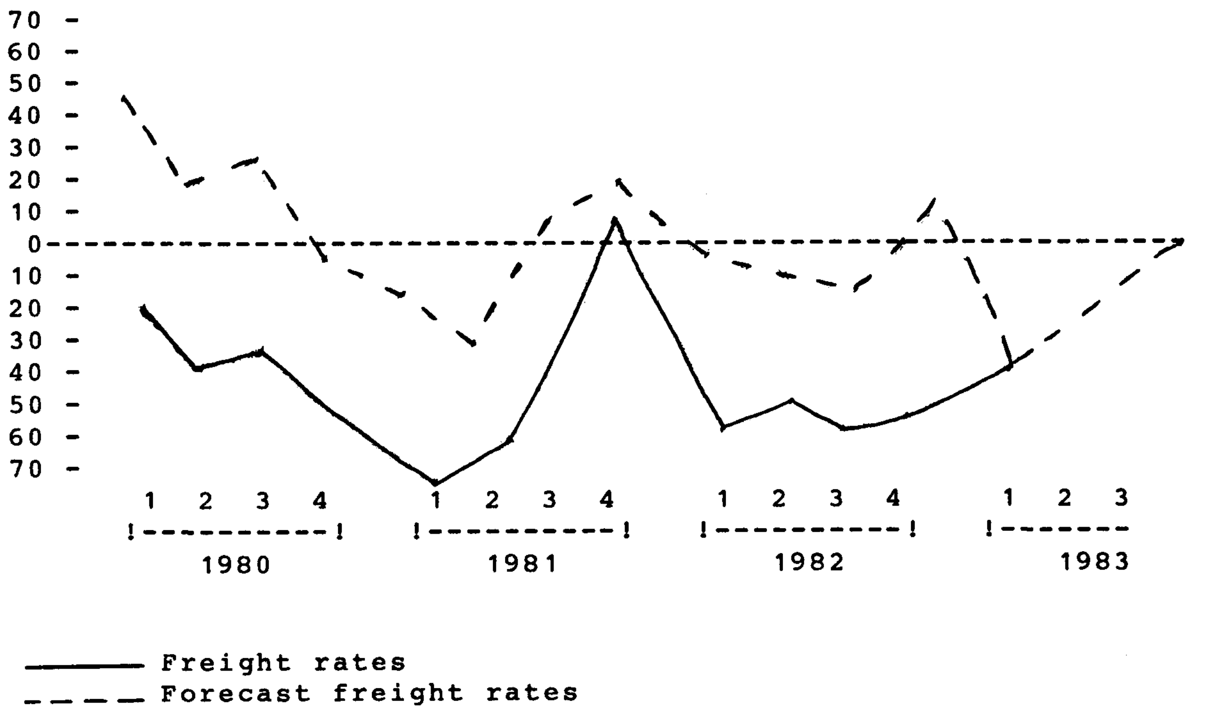
4.1.3. <u>Freight rates</u>

After an increase in rates in the fourth quarter 1982, shippers feel that the upward trend will continue in the first quarter 1983, where rates were considerably higher than in the same quarter of 1981.

Although a drop in traffic is expected for the second quarter 1983, it is anticipated that freight rates will improve. This is expected to continue in the third quarter with traffic improving as well.

<u>Figure 4.3.</u> 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 second quarter of 1983 amongst Belgian and Dutch waterway transporters shows that activity is felt to be up against the first quarter 1983, but considerably down against the second quarter 1982. The expected seasonal upturn during the second quarter emerged but was considerably lower than last year and indicates that the market is still depressed.

The balance of opinion during 1982 and quarters 1 and 2, 1983, is :

1982				1983	
Q1	Q2	Q3	Q4	Q1	Q2
-57	-28	-67	-43	-58	-45

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

Table 4.1.: Changes in activity assessment (difference in respective balance of opinion) by Dutch and Belgian shippers, Q2 over Q1 by bilateral relation.

From/To	B	F	NL
B	-5	-6	-4
F	-2		+19
NL	+6	-20	+26

Although no survey is carried out in France, the statistical data available indicate transport activity measured in tonnes dropped by 2% for French exports, 5,5% for imports and by 11% on the French national market, compared with the same quarter of last year.

Table 4.2.: Changes in activity assessment by Dutch and Belgian shippers Q2 over Q1 by tonnage class.

Tonnage class	Belgian shippers	Dutch shippers	Total
200-450	+9	+11	+7
451-750	+24	0	+20
751-1150	+27	+24	+16
1151-1550	-32	+37	+4
1551	=	+53	+3

The positive signs shown in Tables 4.1. and 4.2. merely reflect relative improvements 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.

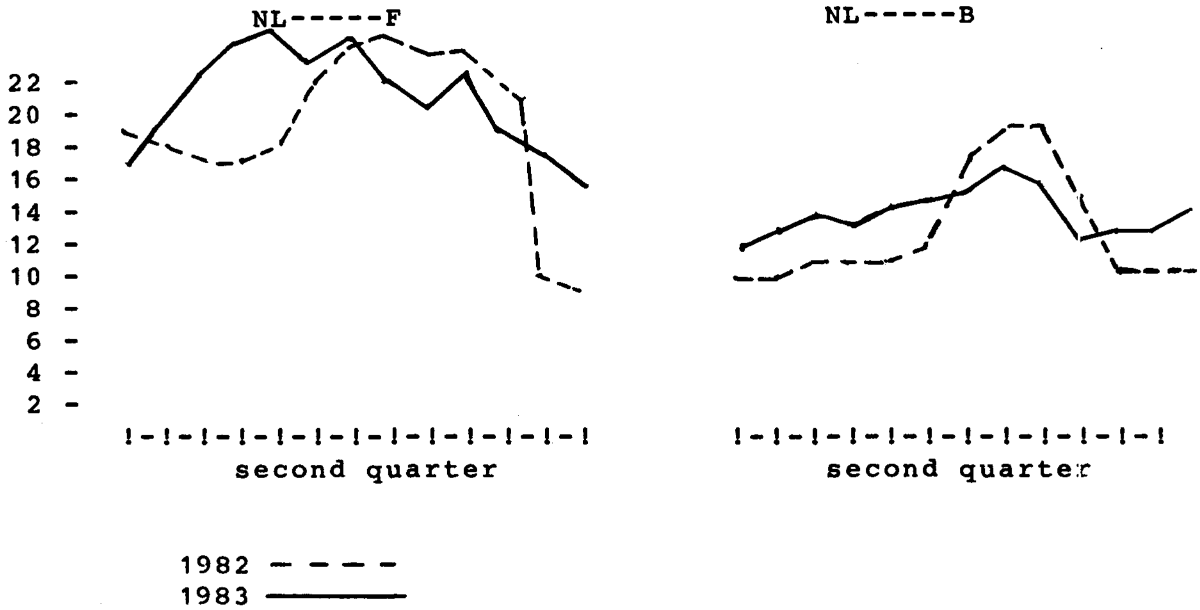
Country of origin	Year	Q1	Q2	Q3	Q4
B*	1981	7.0	6.0	8.0	4.5
	1982	5.2	7.5	8.5	7.5
	1983	8.2	8.8		
F	1981	8.5	7.0	15.3	14
	1982	9.2	18.0	16.1	13.2
	1983	20.9	17.0		
NL	1981	8.3	4.4	5.6	3
	1982	6.5	6.2	9.8	7.1
	1983	6.9	6.9		

*Domestic traffic included

After a sharp increase in the number of waiting days during the second quarter 1982 in France and Belgium and in the third quarter 1982 in the Netherlands, waiting days stabilized at a high level. Given the seasonal trend, the second quarter, in general being better than the first quarter, the conjunctural picture looks rather bad. Only in France did the expect seasonal drop in the number of waiting days materialize.

The following figure shows the development of waiting time on the various bilateral relations during the second quarter 1983 in comparison with the second quarter 1982.

<u>Figure 4.4.</u>: Weekly average of waiting days in the relation from the Netherlands to Belgium and France.



<u>Figure 4.5.</u>: 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).

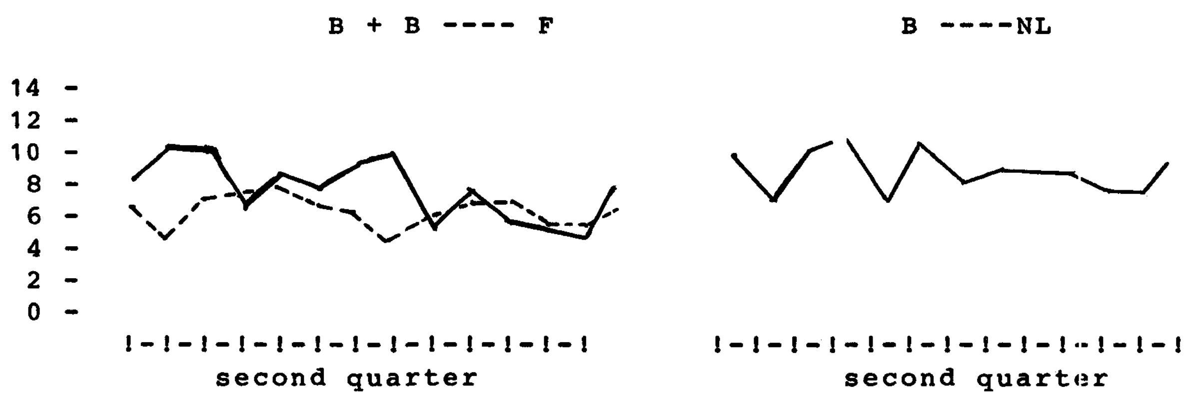
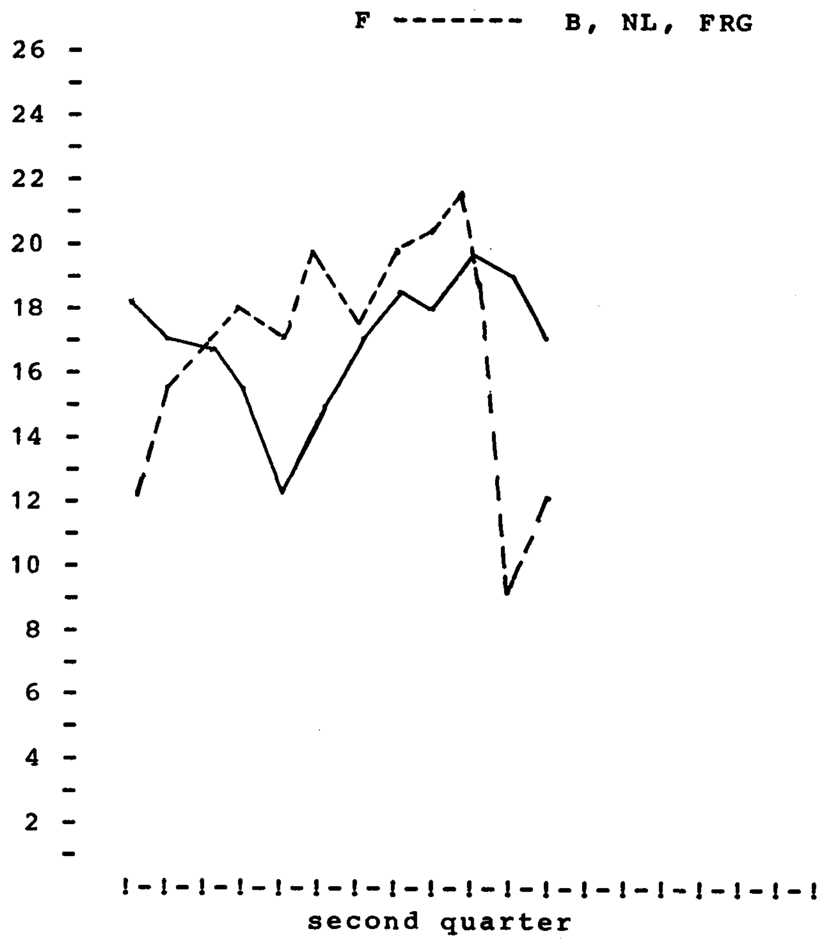


Figure 4.6. Weekly average of waiting days in North-South traffic from France.



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.

4.2.3. 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 2 as against -4 and -18 during the first and fourth quarter 1982 respectively).

4.2.4. Forecasts : Some optimism

Forecasts by inland waterway transporters of the demand for transport services for the third quarter 1983 are in general much less pessimistic than those for the third quarter 1982 and less pessimistic than those for the previous quarter. The opinions of Belgian and Dutch shippers are showing different tendencies as is demonstrated 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	Q3	Q4
B	-10	-23	-33	-40	-64	-52	-49
NL	-15	-8	-48	-6	-31	-24	-18
Total	-13	-13	-43	-17	-42	-33	-28

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

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

Country/Quarter	1982			1983		
	Q2	Q3	Q4	Q1	Q2	Q3
B	-10	-8	0	0	-6	-6
NL	-12	-8	0	-10	-12	-13
Total	-11	-8	0	-7	-10	-11

Although the third quarter is, in general, worse than the second quarter following the holiday season, the less pessimistic view on activity could become a fact as a result of low waterlevels on the Rhine. However the capacity situation will remain structurally unbalanced for some time in the future.

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, SNCF and FS have applied the method on the following links : Germany-France, France-Germany, France-Italy, Italy-France.
SNCB and NS will join the experimental from the beginning of 1984.

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 the 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 the whole basket was recalculated; comparison of this 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

Some figures of the previous quarters concerning DB and FS were modified by those networks, consequently these new figures have been introduced in the present report.
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	30.6.83
100	100.16	107.51	110.38	118.12	124.22	131.51

In the first quarter of 1983 receipts of the French sector show an average increase of 21-22% since 31.12.81 (except wheat 14% and rail-road 28%). This situation remained the same during the second quarter of 1983. On the Italian sector receipts increased in the first quarter of 1983 by 33% (except sand 40%); in the second quarter receipts increased to 59-60% (except sand 68%). Compared to the first quarter of 1983 there was a change in the tariffs of 7.3% due to the Italian sector.

France-Germany

31.12.81	31.3.82	30.6.82	30.9.82	31.12.82	31.3.83	30.6.83
100	102.00	107.89	108.98	108.98	113.75	113.84

Except for cars (other taxings) in both sectors there was no change since the first quarter of 1983. Thus the receipts on the German sector show an increase of 5-8% (since 31.12.81). The increase for the French sector is the same as for the France-Italy relation 21-22% (except maize and car tariff 9674).

Germany-France

31.12.81	31.3.82	30.6.82	30.9.8	31.12.82	31.3.83	30.6.83
100	102.95	108.06	108.06	108.06	113.65	113.98

While in the French sector there was no change in the prices indices during the second quarter of 1983 (the average increase is still 21-22% since 31.12.81), in the German sector the increase went up to 8-9% (5-9% in the last quarter).

Italy-France

31.12.81	31.3.82	30.6.82	30.9.82	31.12.82	31.3.83	30.6.83
100	100.63	108.82	112.19	115.31	120.77	127.33

While the France-Italy relation shows an increase of 32% since 31.12.81 in the Italy-France relation the increase rose by 27%.

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 traffic

Border crossing rail container traffic has been recovering a strongly during the summer of 1983 and up to the end of August of 1983 was some 7% above the early year level. Conditions of price competition remain, however, very difficult and many country to country transport markets remain under the influence a subdued trading climate. Continental business levelled off during the second quarter being 3% above the second quarter of 1982. Traffic to and from the container ports, after a difficult 1982, has again increased strongly, with some important new business especially in connection with the North-Atlantic trade route.

Loaded deep sea containers in the second quarter reached 62.000 TEU and were thus 20% above the second quarter of 1982 and 5% above the first quarter of 1983.

The overall effect in July 1983 will be to increase rail container net rates in the 83/84 period by up to 3% but the net yield has yet to be confirmed.
Current traffic developments, if present trends are maintained, will mean that a second weekly train to and from Greece, will be a permanent feature this winter. Traffic between the Federal Republic of Germany and Italy declined in the early summer, but is now rising again and up to 16 special trains weekly of tank containers are bringing fresh milk from Italy.
Benelux/Italy traffic also increased during the summer and traffic by the Trans-Siberian route is again 20% up on last year due to European cargoes for the Chinese Republice.

6.2. Piggy-back transport

The information given in 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.
The first quarter of 1983 compared to the fourth quarter of 1982 shows that the trend towards a very slight down of the overall growth rate.

International traffic by companies based in the Community

Country of despatch		Units despatched Q1/83	% change from Q4/82	% change from Q1/82
Kombiverkehr	D	12463	7	-11
Novatrans	F	2092	7	-34
	I (except D)	4198	-11	-17
	UK	1078	-20	-19
FERPAC	I (to D)	1835	-13	-14
Trailstar	NL	1397	12	13
TRW	B	2777	- 8	-13
Total		25840	-1	-14

While there were some exceptions in different companies, figures were little pessimistic in the first quarter of 1983 than those in the fourth quarter of 1982.

The companies with the more positive figures are Trailstar and Kombiverkehr which in this quarter achieved a 52% share of the market. In this company since 1.1.83 border crossing traffics SP/F were considered in the D --- SP relation, so the total number of units despatched for this relation is 2.227 (4% from Q4/82). Novatrans, trading in France in total traffic has a small increase of 7% but trading in Italy and UK results show serious losses on almost all relations.
For Ferpac too, there is a diminuation on the number of the units despatched to Germany.
Overall the results are weaker than those of the first quarter 1982 with a decline of -14%.

Important intra-Community relation (over 1000 units in Q1/83)

Relation	Units despatched Q1/83	% change from Q4/82	Q1/82
D ------ I	5131		-20
F ------ I	1571	-6	-5
I ------ F	1539		-12
I ------ UK	1284	-16	-15
I ------ D	1835	-13	-14
I ------ B	1375	-18	-22
UK ------ I	1050	-21	-20
B ------ I (via F)	1792	-17	-15
H ------ I	1107	10	36
Total	16683		

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 Ethniki Statistiki Ypiresia (National Statistical Office
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 Watervervoer
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 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

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

(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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