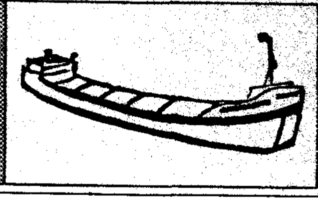
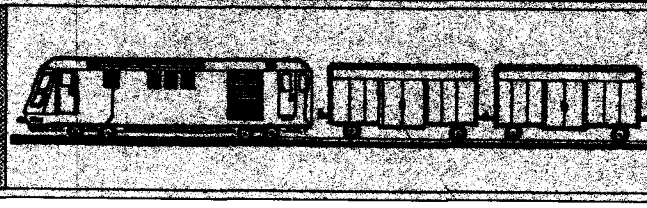
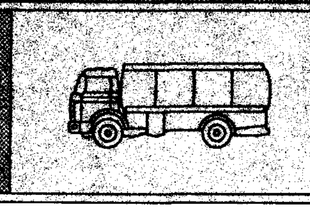
EUROPEAN COMMUNITIES

EUROPA TRANSPORT

OBSERVATION OF THE TRANSPORT MARKETS

MARKET DEVELOPMENTS

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TO THE SPECIAL ATTENTION OF THE USERS OF TRANSPORT STATISTICS

The results of the three Statistical Directives* have been widely used in this Report and in the Annual publications of EUROPA TRANSPORT.

Readers may care to note that the Statistical Office are now publishing the full results of these Directives.

The 1981 publications (for road and inland waterways) are now available.

The 1982 publications (for all three modes) will be available during the course of 1985.

For further details please contact :

Statistical Office of the European Communities
Division C-2,
L - 2920 LUXEMBOURG.

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* Council Directive N° 80/1119/EEC of 17.11.1980
Council Directive N° 78/546/EEC of 12.06.1978
Council Directive N° 80/1177/EEC of 04.12.1980

PRESENTATION OF THE REPORT

The EUROPA TRANSPORT publications report results of the Observation of the Transport Market System.
The following three reports are published:

- Analysis and Forecasts
- Annual Report
- Market Developments

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

- recent developments in the goods transport market between Member States by road, rail, inland waterway (Q3 84) and combined transport (Q3 84 or Q4 84)
- the results of quarterly opinion surveys carried out among international road hauliers (Q4 84)
- the results of six-monthly cost surveys carried out among international road hauliers (1.1.85)
- the results of quarterly price surveys carried out among international road hauliers (Q3 84)
- the results of quarterly opinion surveys among inland waterway operators on two international networks, i.e. the Rhine (Q3 84) and the North/South (Q4 84) (North/South being inland waterway flows between the Netherlands, Belgium and France, West of the Rhine)
- the result of six-monthly cost surveys among inland waterway operators, as published in Quarterly Report N° 14, but with a changed base year : 1.1.1979 instead of 1.1.1982
- the results of quarterly price indices for international rail movements (Q4 84).

In this report the following new item will appear:

- the results of quarterly price surveys among inland waterway operators for the North/South network and for the Rhine, as collected by the CCR.

The surveys are undertaken by various organisations in the Member States; the list of these organisations is annexed.

SUMMARY

	ITEM	EVOLUTION		CHAPTER
3 MODES	EUR-10 tot. tonnage	↗	+ 6.2 % Q3 84/Q3 83	table 1.1
ROAD	EUR-10 tonnage	↗	+ 2.1 % Q3 84/Q3 83	table 1.1
	Modal share	↘	- 1.6 % Q3 84/Q3 83	" 1.2
	Costs nat. currency	↗		chap.2.2.3
	Prices nat. curr.	↗	Max.= + 8.8 % (IT)	chap.2.3.3
		↘	Min.= - 0.9 % (NL)	" 2.3.3
	EUR-10 traf. matrix		Q3 84/Q3 83 by relat.	table 2.0
INLAND WATER-WAYS	EUR-5 tonnage	↗	+ 5.5 % Q3 84/Q3 83	table 1.1
	Modal share	→	- 0.2 % Q3 84/Q3 83	table 1.2
	Total costs (ECU)	↗	+ 4.7 % Q3 84/Q3 83	table 3.6
	Prices (ECU)	↗	+ 4.2 % Q3 84/Q383	table 3.9
RAIL	EUR-10 tonnage	↗	+22.0 % Q3 84/Q3 83	table 1.1
	Modal share	↗	+ 1.8 % Q3 84/Q3 83	" 1.2
	EUR-10 traf. matrix		Q3 84/Q3 83 by relat.	" 4.1
COMBINED TRANS-PORT	Rail container traffic	↗	+ 7 % Q4 84/Q4 83	chap. 5.1
	Piggy-back traffic	↗	+ 17 % Q3 84/Q3 83	" 5.2.1

N.B. : Q3 84/Q3 83 represents the evolution of the third quarter of 1984 compared to the third quarter of 1983.

SECTION 1

GENERAL MARKET ASSESSMENT - ALL MODES

Road - Rail - Inland Waterways

Third quarter 1984

The total tonnage for all three modes in the third quarter 1984 (Q3 84) was up + 6.2 % on the same quarter of the previous year (Q3 83) and was the highest tonnage registered by each of the three modes for this period of the year for a considerable time. However, the growth rate of total tonnage slowed down for the third consecutive quarter.

Table 1.1. : International EUR-10 traffic in million tonnes(1)

Mode	Mio Tonnes Q3 84	Mio Tonnes Q3 83	% change Q3 84/Q3 83
Road	42.7	41.9	+ 2.1
Rail	15.6	12.7	+ 22.0
I.W.	49.6	47.0	+ 5.5
Total EUR-10	107.9	101.6	+ 6.2 %

As shown in figure 1.1., the growth rate of Inland Waterways tonnage (+ 5.5%) and of road tonnage (+ 2.1%) slowed down in contrast to the spectacular rail tonnage increase (+ 22%). This can be explained partially by the fact that in the same period of last year (Q3 83/Q3 82), I.W. and road had already shown significant increases while rail was still declining (see table 1.3.).

As a result of its 22% boom in tonnage in the third quarter 1984, rail continued to recover market share, mainly at the expense of road as illustrated in table 1.2.

Table 1.2. : Modal split (EUR-10)

Mode	Mio Tonnes Q3 84	Modal Split in % Q3 84	Q3 83	Evolution Q3 84/Q3 83
Road	42.7	39.6	41.2	- 1.6 %
Rail	15.6	14.4	12.6	+ 1.8 %
I.W.	49.6	46.0	46.2	- 0.2 %
Total EUR-10	107.9	100 %	100 %	-

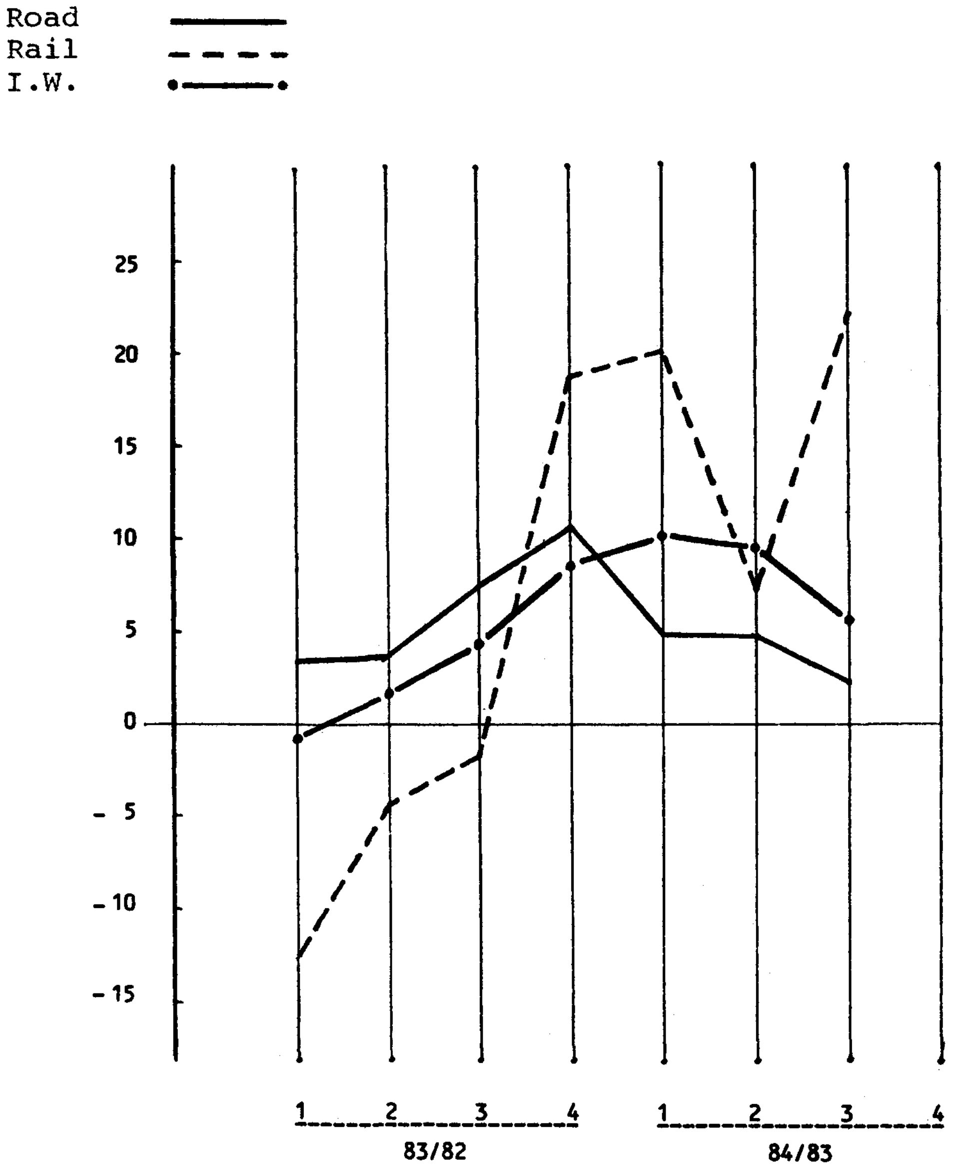
(1) Because of the strong seasonality of traffic, its evolution is monitored by comparing the results of a quarter with the corresponding quarter of the previous year.

Table 1.3.: Traffic Evolution by mode
(% difference between one quarter and the corresponding quarter of the previous year).

Mode	Q3 83/82	Q4 83/82	Q1 84/83	Q2 84/83	Q3 84/83
Road	+ 7.2	+ 10.4	+ 4.7	+ 4.7	+ 2.1
Rail	- 2.0	+ 18.7 R	+ 20.0	+ 7.2	+22.0
I.W.	+ 4.2	+ 8.4	+ 10.0	+ 9.4	+ 5.5
3 Modes	+ 4.6	+ 10.7	+ 9.3	+ 7.1	+ 6.2

R = revised.

Figure 1.1. : Graphic representation of growth rates by mode.



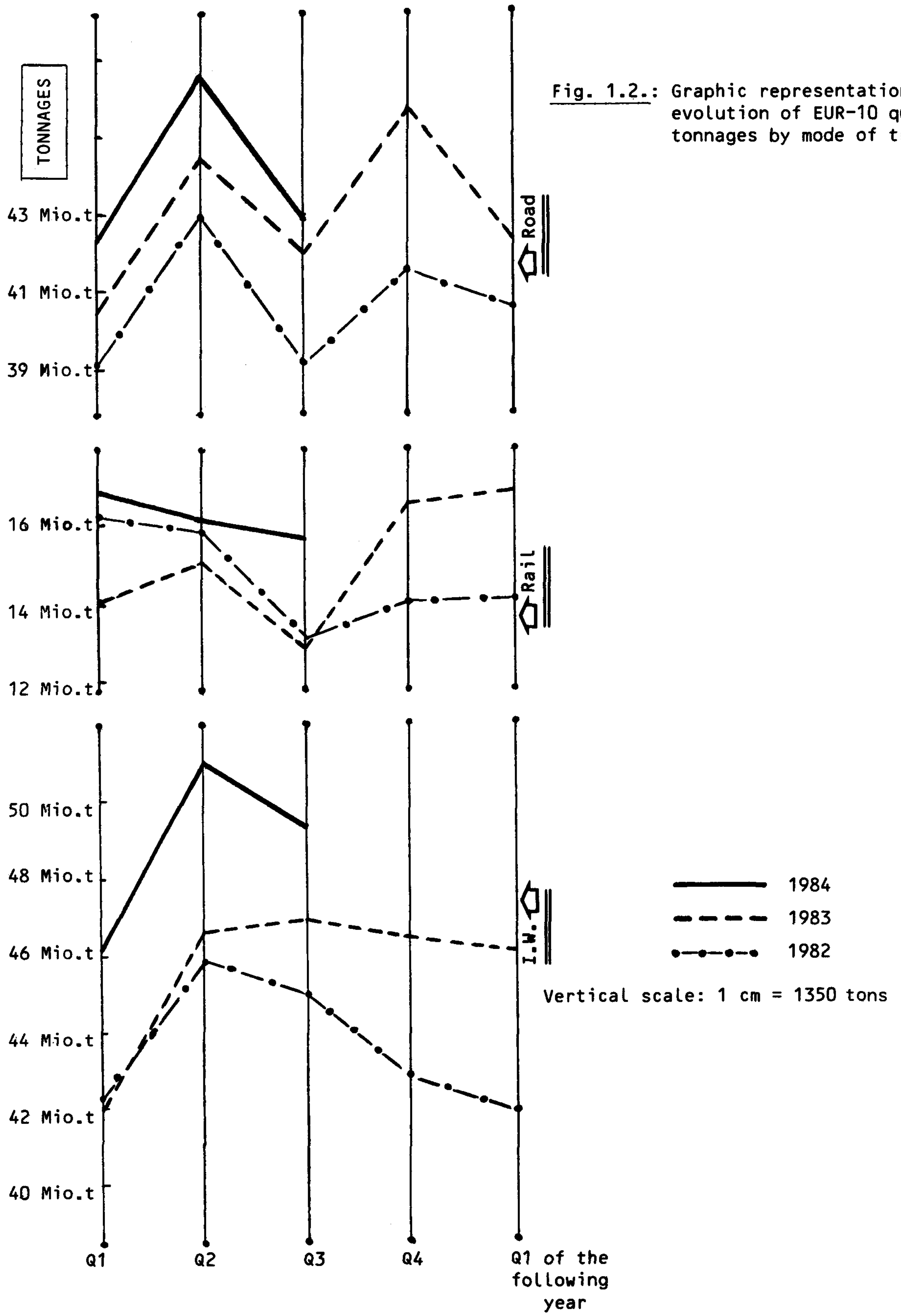


Fig. 1.2.: Graphic representation of the evolution of EUR-10 quarterly tonnages by mode of transport

SECTION 2

ROAD

Table 2.0.: EUR-10 tonnage evolution (in percentage) Q3 84/Q3 83 by transport relation (1).

To / From	D	F	I	NL	B+L	UK	IRL	DK	GR	EUR 10
D	x	+ 8	- 6	- 3	+ 2	+15	0	+13	0	+ 0.8
F	0	x	+17	+11	- 2	+18	+10	+ 1	+21	+ 3.7
I	-10	+12	x	+ 1	- 6	N.A.	N.A.	+13	+29	- 2.0
NL	+ 5	+ 5	+ 4	x	+ 5	N.A.	N.A.	+ 9	+28	+ 5.1
B+L	+ 2	- 2	+14	+ 1	x	+13	+16	+ 2	+20	+ 0.8
UK	+ 2	+18	N.A.	N.A.	+12	x	N.A.	+15	+29	+12.0
IRL	0	- 4	N.A.	N.A.	N.A.	N.A.	x	0	0	- 2.9
DK	- 5	+22	+ 6	+15	+15	- 8	+190	x	-56	- 1.8
GR	+14	-14	+72	-14	-14	+40	0	+ 7.	x	+11.8
EUR 10	+0.4	+3.8	+ 5.6	-0.7	+2.0	+13.1	+16.7	+10.3	+11.2	+2.1

N.A.=not available

(1) Excludes B-L and L-B.

Road traffic evolution Q3 84/Q3 83

The increase of the intra EUR-10 international road traffic (average = + 2.1%) was the lowest registered since 1.1.1983. Traffic flows to and from Germany suffered from the drop in traffic with Italy.
Total inward and outward traffic with France were on balance as opposed with Italy where outward traffic decreased by 2% while inward traffic increased well above average (+ 5.6%).

Road tonnage evolution (in percentage) first nine months 1984 compared to first nine months 1983.

Member State	Inward traffic from EUR-10 % change $\frac{(Q1+Q2+Q3)84}{(Q1+Q2+Q3)83}$	Outward traffic to EUR-10 % change $\frac{(Q1+Q2+Q3)84}{(Q1+Q2+Q3)83}$	Total Inward and Outward % change
D	+ 1.7	+ 5.4	+ 3.4
F	+ 1.8	+ 5.0	+ 3.3
I	+ 7.5	- 2.8	+ 2.4
NL	+ 4.8	+ 4.8	+ 4.8
B+L	+ 4.6	+ 3.0	+ 3.8
UK	+ 15.9	+ 10.4	+ 13.9
IRL	+ 3.5	+ 24.7	+ 11.6
DK	+ 10.7	- 3.7	+ 2.1
GR	+ 13.2	+ 16.0	+ 14.6
EUR-10			+ 3.9

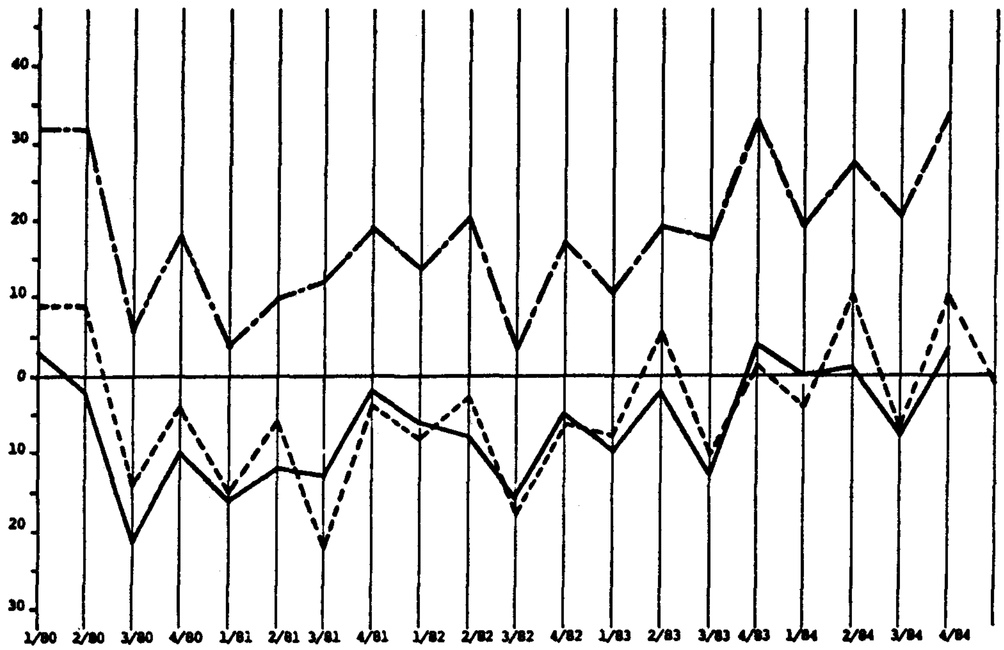
2.1. Road Inquiry Survey

2.1.1. Summary of Activity Indicators
(Figure 2.1, Tables 2.1. and 2.2.)

Road Transport continues towards higher activity levels

The results of the inquiry for the fourth quarter of 1984 point towards an increase in transport activity (balance of opinions: +11 percentage points compared to the third quarter).

Figure 2.1: Activity indicator = global balance of opinion (in percentage)



Utilisation of rolling stock
Activity forecast
Activity

2.1.2. Activity: the activity level went up in the last quarter, but to a large extent this has to be attributed to the usual weakness of the third quarter.

Compared to the fourth quarter 1983, based on the balance of opinions, the level of activity has not changed much.

2.1.3. Forecasts

The forecast for the first quarter of 1985 indicates a slightly negative trend, particularly if compared to the first quarter of 1984 (- 1 percentage point) as if compared to the last quarter of 1984 (- 4 percentage points).

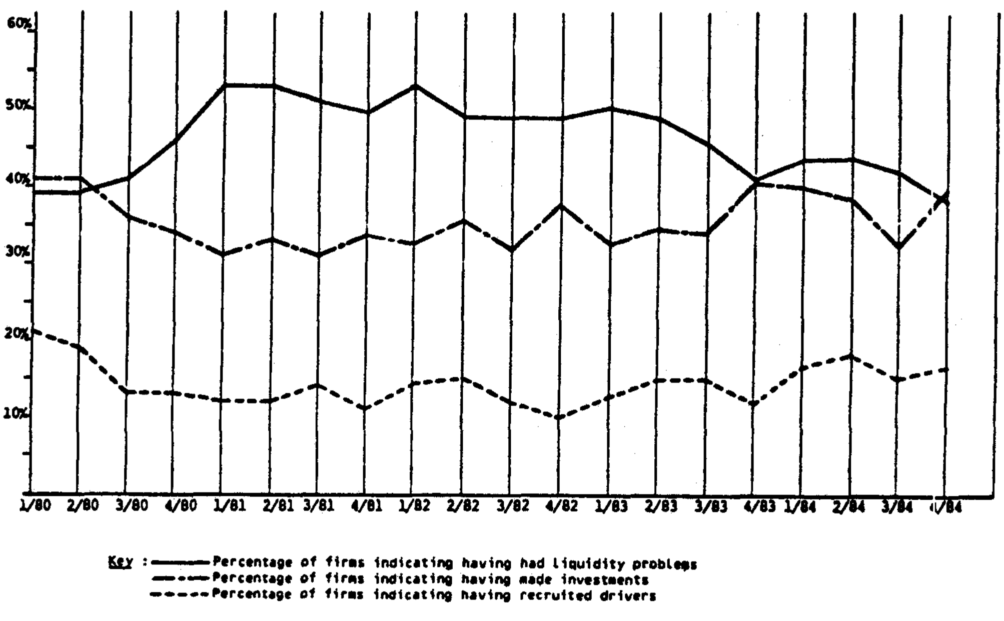
2.1.4. Utilisation of rolling stock

In comparison to the previous quarter the use of the rolling stock has increased (balance of opinions moves from 21 to 34%). Compared to the same quarter one year earlier there is an increase of 1 percentage point.

2.1.5. Summary of economic indicators (Figure 2.2, Tables 2.3., 2.4. and 2.5.)

From the three following indicators it appears that there is moderate optimism among the hauliers.

Figure 2.2: Economic indicators



2.1.6. Recruitment

The number of firms having recruited drivers has increased by 1% if compared to the third quarter of 1984; it is 4% higher than in the same quarter of 1983.

2.1.7. Cash-flow

Cash-flow problems have been reduced as the number of firms declaring to have cash-flow problems, has decreased by 4% if compared to the third quarter of 1984 and by 3% if compared to the same quarter of 1983. This result is the best one obtained since four consecutive years.

2.1.8. Investment

The number of firms declaring having invested in the fourth quarter has increased by 6% compared to the previous quarter, but has fallen by 2% if compared to the same quarter last year.

It should be noticed that there is a strong seasonal factor in the fourth quarter of each year.

Tab. 2.1.

ROAD TRANSPORT SURVEY

ECT-0311 — 4. QUARTER 1984

INTERNATIONAL TRANSPORT ACTIVITY — FORECAST : 1. QUARTER 1985

COUNTRY		1982 Q1	1982 Q2	1982 Q3	1982 Q4	1983 Q1	1983 Q2	1983 Q3	1983 Q4	1984 Q1	1984 Q2	1984 Q3	1984 Q4	1985 Q1	1985 Q2	1985 Q3	1985 Q4
DEUTSCHLAND	+	22	19	18	23	23	24	21	23	22	20	21	21	12			
	=	49	55	44	44	48	45	48	53	56	54	52	55	73			
	−	29	26	38	33	29	31	31	24	22	26	27	24	15			
	S	-7	-7	-20	-10	-6	-7	-10	-1		-6	-6	-3	-3			
FRANCE	+	18	15	14	15	14	15	11	17	18	18	17	17	12			
	=	47	49	50	43	43	49	47	51	53	55	51	57	67			
	−	35	36	36	42	43	36	42	32	29	27	32	26	21			
	S	-17	-21	-22	-27	-29	-21	-31	-15	-11	-9	-15	-9	-9			
ITALIA	+	15	16	14	15	14	15	17	23	16	19	16	16	18			
	=	49	47	41	51	45	54	47	49	53	48	47	55	58			
	−	36	37	45	34	41	31	36	28	31	33	37	29	24			
	S	-21	-21	-31	-19	-27	-16	-19	-5	-15	-14	-21	-13	-6			
NEDERLAND	+	34	32	26	31	31	37	26	40	31	34	22	35	14			
	=	43	45	41	50	44	44	38	42	49	48	38	32	72			
	−	23	23	33	19	25	19	36	18	20	18	40	33	14			
	S	11	9	-7	12	6	18	-10	22	11	16	-18	2				
BELGIQUE-BELGIE	+	28	31	23	30	27	28	21	35	30	31	19	32	24			
	=	48	51	43	47	46	51	44	47	47	55	47	50	60			
	−	24	18	34	23	27	21	35	18	23	14	34	18	16			
	S	4	13	-11	7		7	-14	17	7	17	-15	14	8			
LUXEMBOURG	+	28	26	21	25	21	35	26	21	33	29	24	25	14			
	=	48	50	51	47	52	49	52	61	44	47	51	47	77			
	−	24	24	28	28	27	16	22	18	23	24	25	28	9			
	S	4	2	-7	-3	-6	19	4	3	10	5	-1	-3	5			
UNITED KINGDOM	+	28	25	21	24	23	24	20	26	21	24	20	29	19			
	=	59	56	63	64	61	63	63	66	66	65	72	64	76			
	−	13	19	16	12	16	13	17	8	13	11	8	7	5			
	S	15	6	5	12	7	11	3	18	8	13	12	22	14			
IRELAND	+	21	27	20	28	21	23	23	21	13	16	21	33	15			
	=	48	39	38	37	47	50	60	60	68	67	67	53	61			
	−	31	34	42	35	32	27	17	19	19	17	12	14	24			
	S	-10	-7	-22	-7	-11	-4	6	2	-6	-1	9	19	-9			
DANMARK	+	25	26	17	27	26	19	19	29	21	24	22	26	18			
	=	65	64	61	62	66	65	64	64	62	65	65	68	72			
	−	10	10	22	11	8	16	17	7	17	11	13	6	10			
	S	15	16	-5	16	18	3	2	22	4	13	9	20	8			
HELLAS	+	16	14	17	28	19	32	24	29	27	23	22	23	17			
	=	45	31	34	36	39	39	43	43	45	49	48	54	53			
	−	39	55	49	36	42	29	33	28	28	28	30	23	30			
	S	-23	-41	-32	-8	-23	3	-9	1	-1	-5	-8		-13			
E.E.C.	+	22	21	19	23	21	24	19	26	23	23	20	25	16			
	=	50	50	46	49	48	50	49	52	54	55	52	53	67			
	−	28	29	35	28	31	26	32	22	23	22	28	22	17			
	S	-6	-8	-16	-5	-10	-2	-13	4		1	-8	3	-1			

KEY : % ENTERPRISES : + : INCREASE = : STABLE
- : DECREASE S : (+) - (-)

Tab. 2.2.

ROAD TRANSPORT SURVEY

ECT-0321 — 4. QUARTER 1984

UTILISATION OF ROLLING STOCK

COUNTRY		1982				1983				1984				1985			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEUTSCHLAND	+	33	28	20	19	27	31	27	33	34	35	29	36				
	=	49	51	51	54	51	51	51	50	50	48	51	47				
	−	18	21	29	27	22	18	22	17	16	17	20	17				
FRANCE	+	29	42	27	30	22	29	27	30	23	24	21	27				
	=	35	24	40	41	41	37	43	44	45	50	52	50				
	−	36	34	33	29	37	34	30	26	32	26	27	23				
ITALIA	+	15	14	17	12	11	14	22	36	21	18	19	20				
	=	64	62	52	64	54	69	57	49	44	56	63	64				
	−	21	24	31	24	35	17	21	15	35	26	18	16				
NEDERLAND	+	51	60	38	41	42	63	51	69	65	80	66	78				
	=	37	35	40	45	46	30	40	30	27	19	30	21				
	−	12	5	22	14	12	7	9	1	8	1	4	1				
BELGIQUE-BELGIE	+	41	56	39	45	48	57	54	57	60	59	48	59				
	=	43	34	42	41	40	33	37	36	33	34	43	36				
	−	16	10	19	14	12	10	9	7	7	7	9	5				
LUXEMBOURG	+	19	21	14	37	38	39	38	42	48	46	39	32				
	=	74	68	72	50	53	58	49	55	48	54	58	55				
	−	7	11	14	13	9	3	13	3	4		3	13				
UNITED KINGDOM	+	65	62	58	69	60	69	61	69	66	68	74	84				
	=	26	22	23	24	30	20	27	24	16	28	22	14				
	−	9	16	19	7	10	11	12	7	18	4	4	2				
IRELAND	+	34	30	30	46	37	49	43	86	41	35	52	78				
	=	37	40	47	41	39	30	41	8	21	42	30	19				
	−	29	30	23	13	24	21	16	6	38	23	18	3				
DANMARK	+	49	47	43	54	55	44	46	57	44	52	50	56				
	=	43	47	44	41	37	43	43	39	47	43	42	40				
	−	8	6	13	5	8	13	11	4	9	5	8	4				
HELLAS	+	17	14	8	27	17	15	25	35	32	31	34	37				
	=	54	29	31	39	41	50	41	49	36	51	34	40				
	−	29	57	61	34	42	35	34	16	32	18	32	23				
E.E.C.	+	35	41	30	36	34	38	37	46	39	42	37	46				
	=	44	39	44	45	43	43	44	41	41	43	47	42				
	−	21	20	26	19	23	19	19	13	20	15	16	12				

KEY : % ENTERPRISES : + : INCREASE = : STABLE
− : DECREASE

Tab. 2.3.

ECT-0331

ROAD TRANSPORT SURVEY

4. QUARTER 1984

PERCENTAGE OF FIRMS INDICATING HAVING RECRUITED DRIVERS

COUNTRY	1982				1983				1984				1985			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEUTSCHLAND	5	5	3	2	6	5	8	5	4	8	5	5				
FRANCE	5	3	4	4	6	3	3	3	5	9	5	3				
ITALIA	21	24	18	16	17	25	19	20	15	19	17	17				
NEDERLAND	18	19	19	8	15	25	18	16	32	28	26	27				
BELGIQUE-BELGIE	21	26	19	15	18	22	21	15	23	28	21	18				
LUXEMBOURG	21	31	28	27	42	35	44	28	38	38	24	16				
UNITED KINGDOM	21	19	20	21	18	26	25	22	20	28	20	33				
IRELAND	17	15	10	19	21	15	27	24	26	20	43	35				
DANMARK	14	20	6	11	10	13	15	12	25	20	16	16				
HELLAS	36	24	25	20	29	28	25	19	22	22	22	20				
E.E.C.	14	15	12	10	13	15	15	12	16	18	15	16				

Tab. 2.4.

ECT-0341

ROAD TRANSPORT SURVEY

4. QUARTER 1984

PERCENTAGE OF FIRMS INDICATING HAVING LIQUIDITY PROBLEMS

COUNTRY	1982				1983				1984				1985			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEUTSCHLAND	40	39	40	62	31	26	29	20	18	23	22	17				
FRANCE	64	60	60	57	64	65	59	59	59	57	53	50				
ITALIA	72	76	69	70	76	76	68	63	72	66	63	64				
NEDERLAND	18	12	11	10	13	6	7	3	6	3	3	2				
BELGIQUE-BELGIE	32	27	26	31	27	26	21	21	21	14	20	15				
LUXEMBOURG	57	38	40	42	27	16	19	15	23	17	43	45				
UNITED KINGDOM	56	49	53	50	49	44	42	41	46	47	33	38				
IRELAND	58	58	50	59	59	55	42	43	40	45	44	32				
DANMARK	32	21	32	18	20	19	17	6	16	8	9	6				
HELLAS	54	76	79	69	72	68	76	67	60	57	59	61				
E.E.C.	53	49	49	49	50	49	46	41	43	43	42	38				

Tab. 2.5.

ROAD TRANSPORT SURVEY

ECT-0351 — 4. QUARTER 1984

PERCENTAGE OF FIRMS INDICATING HAVING MADE INVESTMENTS

COUNTRY	1982				1983				1984				1985			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEUTSCHLAND	27	35	30	34	34	44	39	52	42	42	34	40				
FRANCE	34	35	31	42	29	29	29	34	35	32	28	31				
ITALIA	26	25	21	20	18	24	25	34	24	33	23	31				
NEDERLAND	46	42	43	46	41	47	44	44	58	66	55	52				
BELGIQUE-BELGIE	30	39	32	38	42	40	42	46	41	42	36	44				
LUXEMBOURG	26	29	28	47	38	20	47	39	33	31	46	45				
UNITED KINGDOM	53	63	61	67	49	67	68	65	71	74	62	75				
IRELAND	25	22	27	19	31	24	44	46	55	36	49	44				
DANMARK	43	45	35	42	43	51	51	55	53	52	52	57				
HELLAS	33	42	24	29	42	34	34	37	42	22	37	36				
E.E.C.	33	36	32	38	33	35	35	41	40	38	33	39				

2.2. Cost Indices

2.2.1. Coverage

Cost indices surveys are conducted in seven countries : Germany, France, the Netherlands, Belgium /Luxembourg, United-Kingdom and Denmark. Results have not yet been received from Italy, Ireland and Greece. The German, Dutch and Belgian surveys have given a breakdown of the cost factors by geographical relation. This report relates to the cost indices at 1.1.1985. The analysis of the surveys for Germany, Belgium/Luxembourg and Denmark have not yet been received.
The indices relate to the transport of goods by road between Member States.

2.2.2. Methodology

Indices for fuel are shown separately (tables 2.6. and 2.7.; and figures 2.3. and 2.5.), 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 2.8. and 2.9. as well as in figures 2.4. and 2.6.

2.2.3. Overall cost developments : second half of 1984

In national currency, cost indices increased for France (+ 4.0%), the U.K. (+ 2.2%) and the Netherlands (+ 1.9%).
In ECU, the changes were as follows: France (+ 4.0%), the Netherlands (+ 2.3%), the U.K. (+ 0.1%).

2.2.4. Fuel cost developments : second half of 1984

For the three countries for which information is available, dramatic increases have been noted, mainly due to th e strength of the US-dollar.

In national currency, increases were as follows: the U.K. (+ 9.1%), France (+ 7.1%), the Netherlands (+ 3.7%).
In ECU, increases were as follows:
France (+ 7.0%), the U.K. (+ 6.5%), the Netherlands (+ 4.2%).

Table 2.6. : Fuel cost in national currency

		1.1.79	1.1.80	1.1.81	1.7.81	1.1.82	1.7.82	1.1.83	1.7.83	1.1.84	1.7.84	1.1.85
Germany	(DM)	57,5	74,1	86,5	93,6	100,0	96,8	99,1	91,4	94,7	90.7	
France	(FF)	53,1	66,5	86,2	95,1	100,0	108,2	117,2	117,6	118,5	123.5	130.6
Netherland	(HFL)	57,0	77,0	86,2	94,4	100,0	99,0	99,4	91,9	97,8	89.8	93.5
B/L	(BFR)					100,0	106,1	113.3	108,6	113,9	108.8	
U.K.	(UKL)	49,8	70,7	82,6	102,4	100,0	102,4	111,5	110,7	110,7	114.0	123.1
Denmark	(DKR)			78,1	95,8	100,0	100,0	118,0	108,2	106,6	111.2	

Table 2.7. : Fuel cost in ECU

	1.1.79	1.1.80	1.1.81	1.7.81	1.1.82	1.7.82	1.1.83	1.7.83	1.1.84	1.7.84	1.1.85
Germany	56,0	72,7	81,9	90,7	100,0	100,2	105,5	98,3	102,6	99.1	
France	57,2	70,9	89,8	98,6	100,0	102,3	111,8	106,8	106,6	111.7	118.7
Netherland	56,3	75,1	82,3	90,1	100,0	101,7	105,3	96,7	103,3	95.3	99.5
B/L					100,0	98,0	104.6	99,2	101,2	99.8	
U.K.	41,5	62,7	87,4	105,0	100,0	104,8	103,3	108,8	109,3	108.3	114.8
Denmark			78,5	98,6	100,0	97,7	116,6	105,7	104,2	108.6	

Table 2.8. : Total cost indices in national currency

		1.1.79	1.1.80	1.1.81	1.7.81	1.1.82	1.7.82	1.1.83	1.7.83	1.1.84	1.7.84	1.1.85
Germany	(DM)	79,6	86,3	94,6	98,8	100,0	102,3	102,4	102,5	103,5	104.2	
France	(FF)	64,5	73,0	86,3	94,8	100,0	108,5	113,8	121,1	123,7	128.3	132.3
Netherland	(HFL)	77,9	86,6	92,5	96,4	100,0	101,1	102,5	100,8	103,0	102.4	104.3
B/L	(BFR)					100,0	105,6	110.2	110,4	114,6	115.3	
U.K.	(UKL)	63,0	77,3	91,5	99,2	100,0	106,0	108,4	112,8	113,1	117.7	119.9
Denmark	(DKR)			88,3	95,1	100,0	102,5	111,6	110,3	110,7	114.8	

Table 2.9.: Total cost indices in ECU

	1.1.79	1.1.80	1.1.81	1.7.81	1.1.82	1.7.82	1.1.83	1.7.83	1.1.84	1.7.84	1.1.85
Germany	77,5	84,7	89,6	95,8	100,0	105,9	109,0	110,2	112,2	113.9	
France	69,5	77,8	89,8	98,2	100,0	102,6	108,5	110,0	111,3	116.1	120.1
Netherland	77,1	84,5	88,3	92,1	100,0	103,8	108,6	106,1	108,8	108.7	111.0
B/L					100,0	97,6	101.8	100,9	101.8	105.9	
U.K. (Revised)	52.5	68.5	96.8	101.7	100.0	108.5	100.4	110.9	111,7	111.8	111.9
Denmark			88,8	96,1	100,0	100,1	110,2	107,8	108,2	112.2	

Figure 2.3.

FUEL COSTS IN ECU

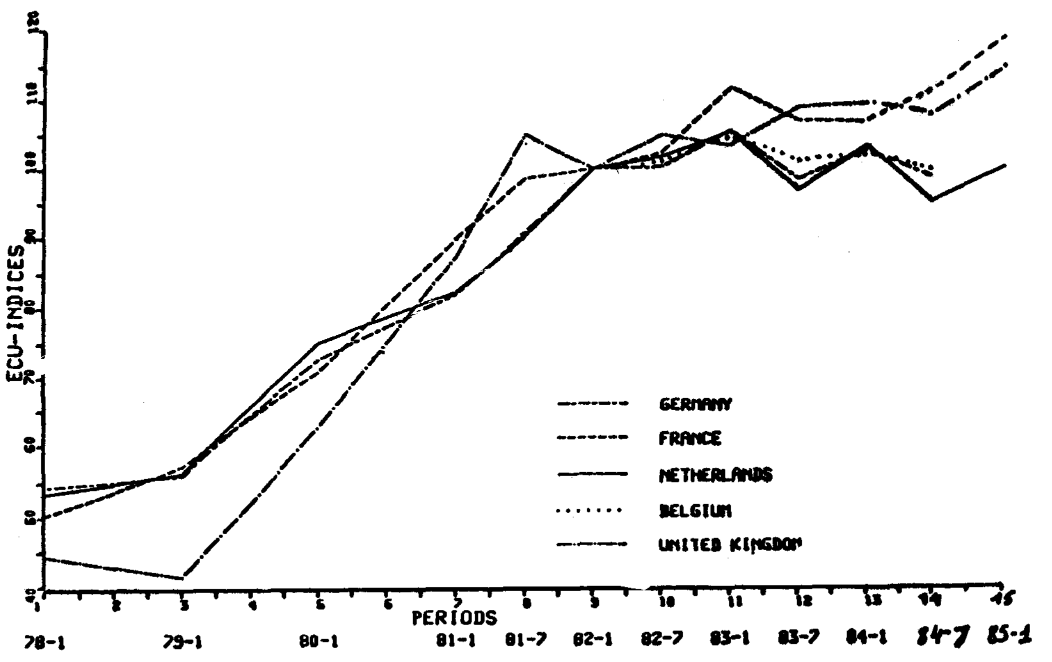


Figure 2.4.

TOTAL COSTS IN ECU

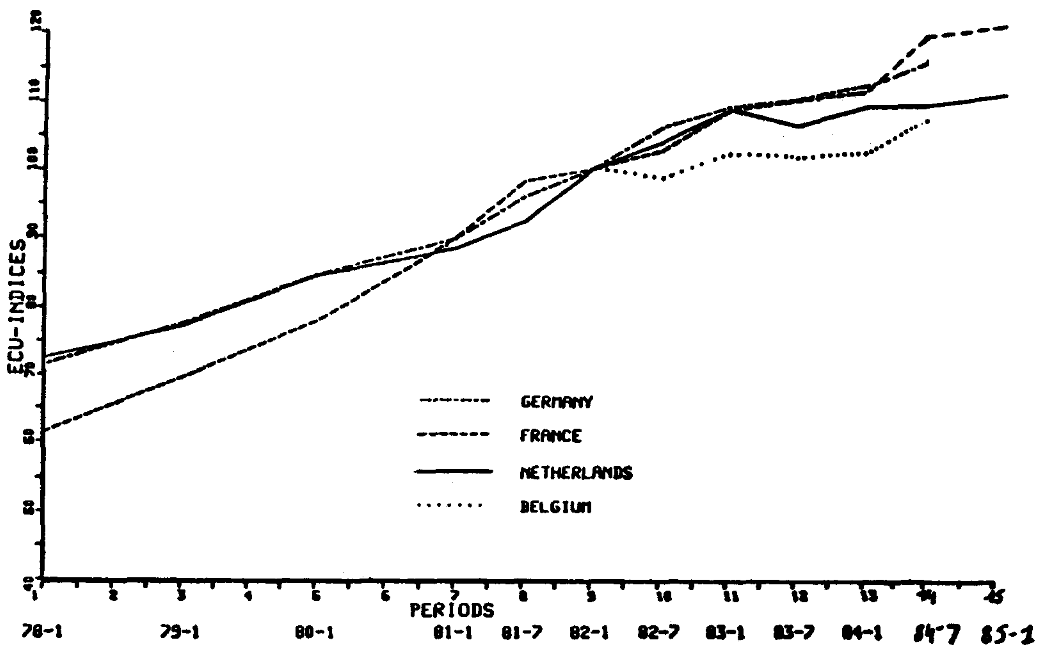


Figure 2.5.

FUEL COSTS IN NATIONAL CURRENCY

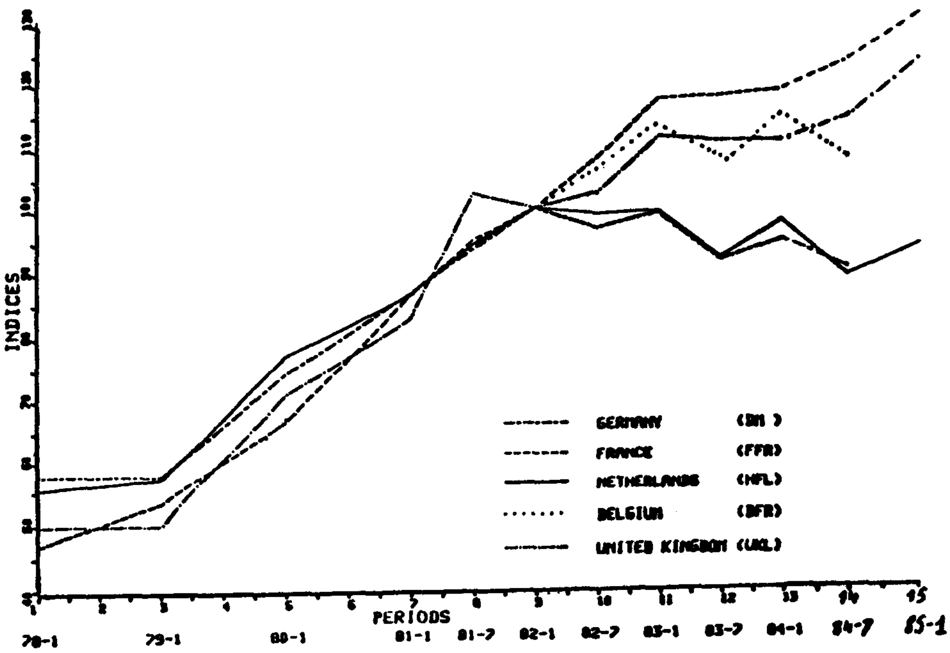
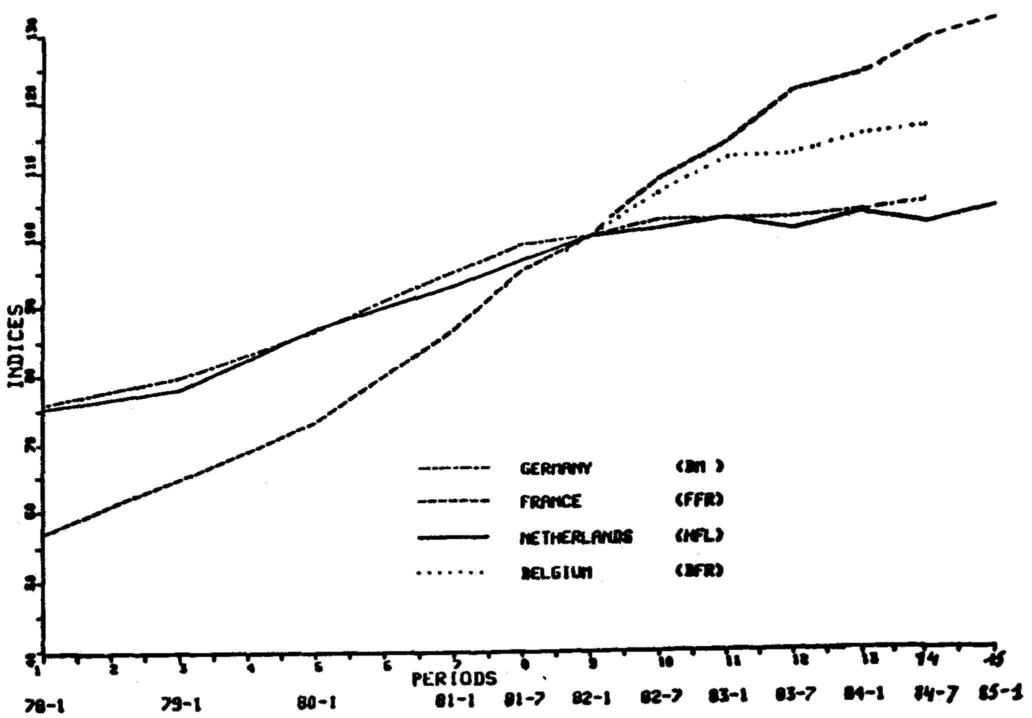


Figure 2.6.

TOTAL COSTS IN NATIONAL CURRENCY



(4)

2.3. Price Surveys

2.3.1. Coverage

Price surveys are being carried out in Germany, France, Italy, the Netherlands Belgium/Luxembourg and Greece. The analysis relates to movements between these Member States up to the third quarter of 1984.

2.3.2. Methodology

The base point for the price indices results has been chosen as the third quarter of 1983, which was the first quarter available for Greece. In the calculations, the weighting factors used are tonne-kilometres relating to 1980. The evolution is monitored by comparing the results of a quarter with the previous quarter.

2.3.3. Overall results by nationality of haulier

Figure 2.7. shows the evolution of the overall results by nationality of hauliers in ECU and in national currency.
Compared with the previous quarter, overall average prices (measured in national currencies) have increased significantly for Italian hauliers (+8.8%) and with Greece (+7.1%). Overall average prices decreased slightly for German hauliers (-0.1%) and Dutch hauliers (-0.9%).

In Ecu, compared with the previous quarter, overall average prices also decreased for German hauliers (-0.3%) and Dutch hauliers (-1.2%).

2.3.4. Price developments in relation by nationality of haulier

Figure 2.8. 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 2.9. shows average prices of Italian hauliers and partner country. Figure 2.10 shows the development of the average prices in Ecus of Greek hauliers in relation with their partner countries. No data are available from the Member States for the relations with Greece.

German hauliers

Compared with the previous quarter, average prices in ECU increased slightly in relation with Italy (+1.0%). In relation with the other Member States average prices decreased slightly.

French hauliers

Compared with the previous quarter, average prices in ECU decreased slightly in relation with Germany (-1.7%). In relation with the other Member States, average prices increased slightly.

Italian hauliers

Compared with the previous quarter, average prices in ECU increased quite significantly in relation with the other Member States especially with France (+12.4%). In relation with Italy, average prices in ECU have increased for all the Member States.

Dutch hauliers

Compared with the previous quarter, average prices in ECU only increased in relation with Italy (+0.7%). In relation with Germany and France average prices in ECU decreased slightly (1.6 and 1.2% respectively). Data for the relation with Belgium/Luxembourg have not yet been received for this quarter.

Belgium/Luxembourg hauliers

In ECU, compared with the previous quarter, average prices decreased very much in relation with the Netherlands (-10.2%). In relation with France (+7.4%) and Italy (+4.5%), average prices increased significantly.

Greek hauliers

In ECU, average prices increased in relation with all the Member States, especially in relation with the Netherlands (+8.7%) and with Italy (+5.7%).

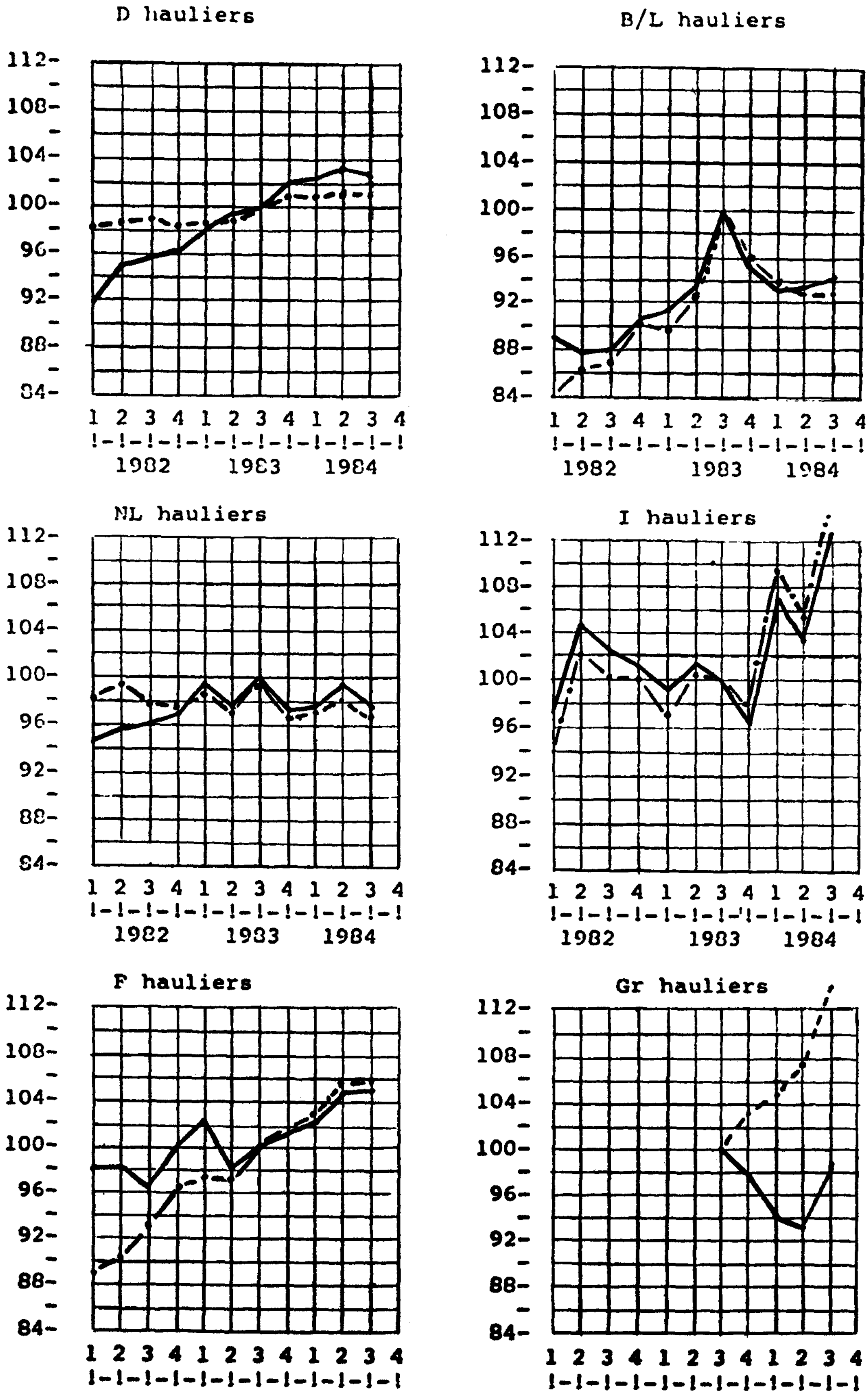
Table 2.10.

Comparison Q3 84 - Q2 84

Relation with / Nation. of hauliers	IN ECU						WEIGHTED AVERAGES	
	D	F	I	NL	B/L	GR	In ECU	In nat. curr.
D	-	- 0.2	+ 1.0	- 0.7	- 0.7	N.A.	- 0.3	- 0.1
F	- 1.7	-	+ 0.9	+ 2.1	+ 1.0	N.A.	+ 0.1	+ 0.1
I	+ 8.8	+12.4	-	+ 5.6	+ 5.9	N.A.	+ 9.3	+ 8.8
NL	- 1.6	- 1.2	+ 0.7	-	N.A.	N.A.	- 1.2	- 0.9
B/L	- 0.3	+ 7.4	+ 4.5	-10.2	-	N.A.	+ 0.7	N.C.
GR	+ 3.8	+ 4.4	+ 5.7	+ 8.7	+ 3.9	-	+ 5.4	+ 7.1

1) N.A. = not available.
2) N.C. = no change

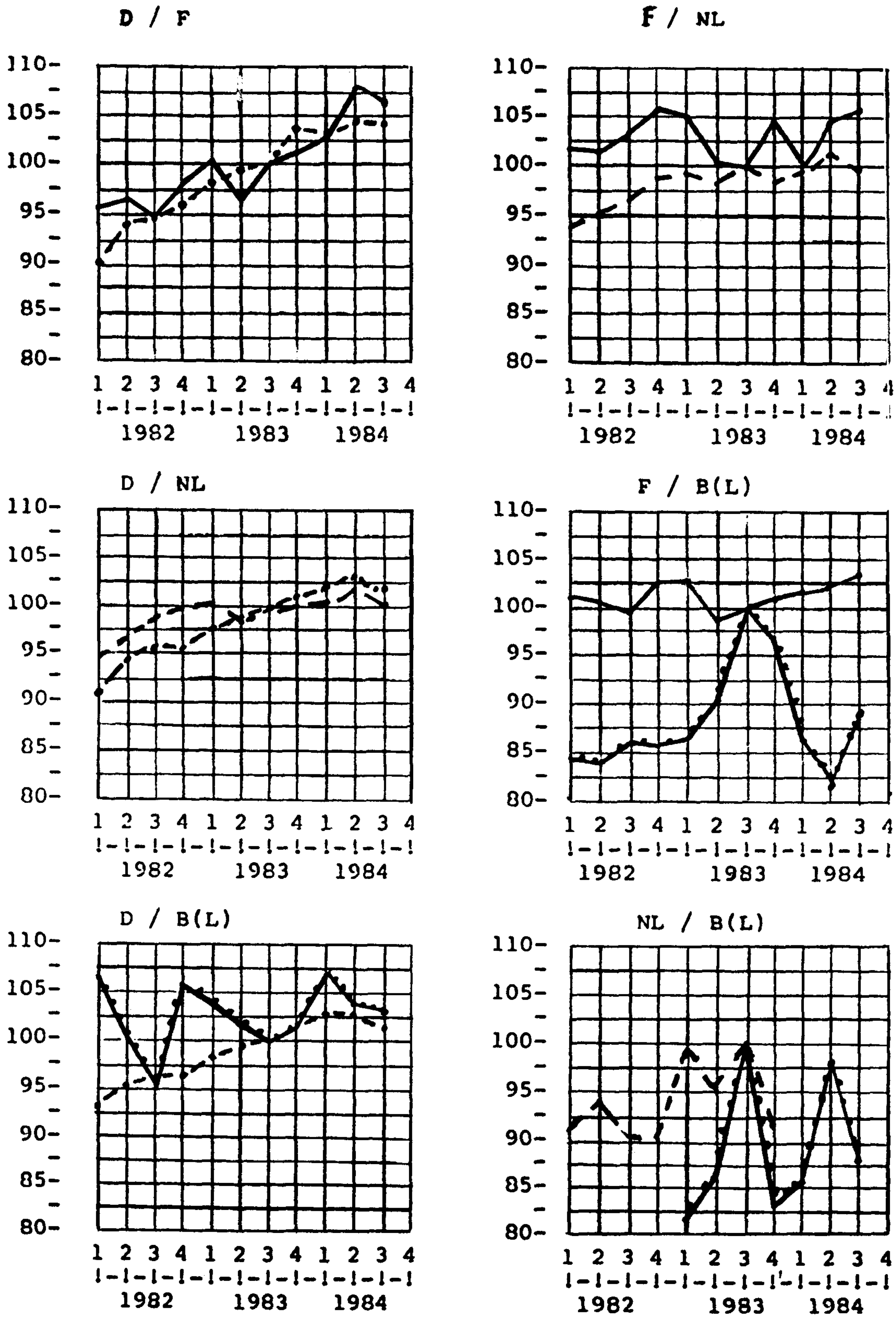
Figure 2.7.: Effects of changes in exchange rates



Indices at current prices (in national currencies) relations with D, F, NL, B and L. —·—·—·

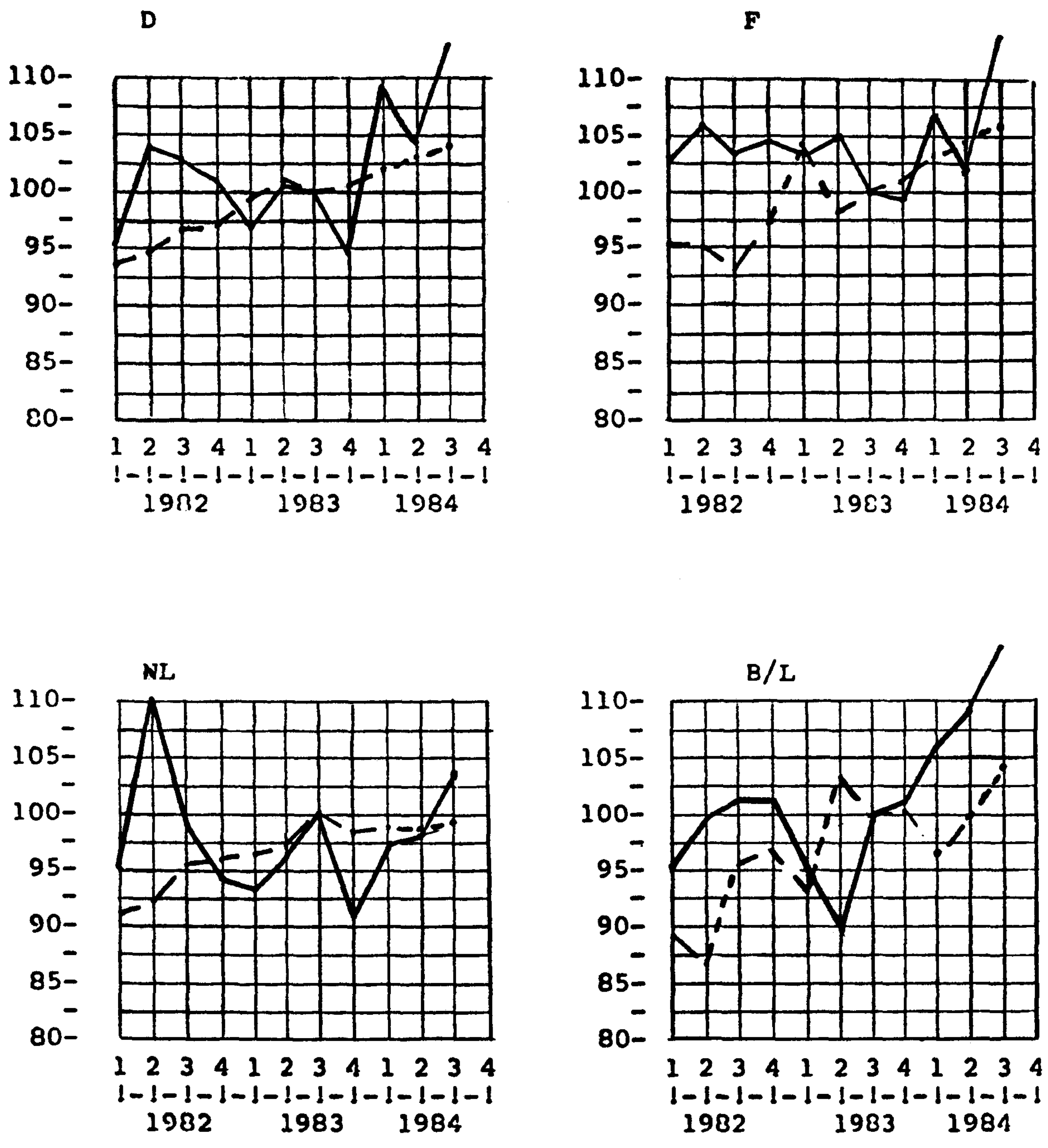
Indices at current prices in ECU. ————

Figure 2.8.: Price Development in relations between D,F,NL,B(L)



France
Germany
Netherlands
Belgium/Luxembourg

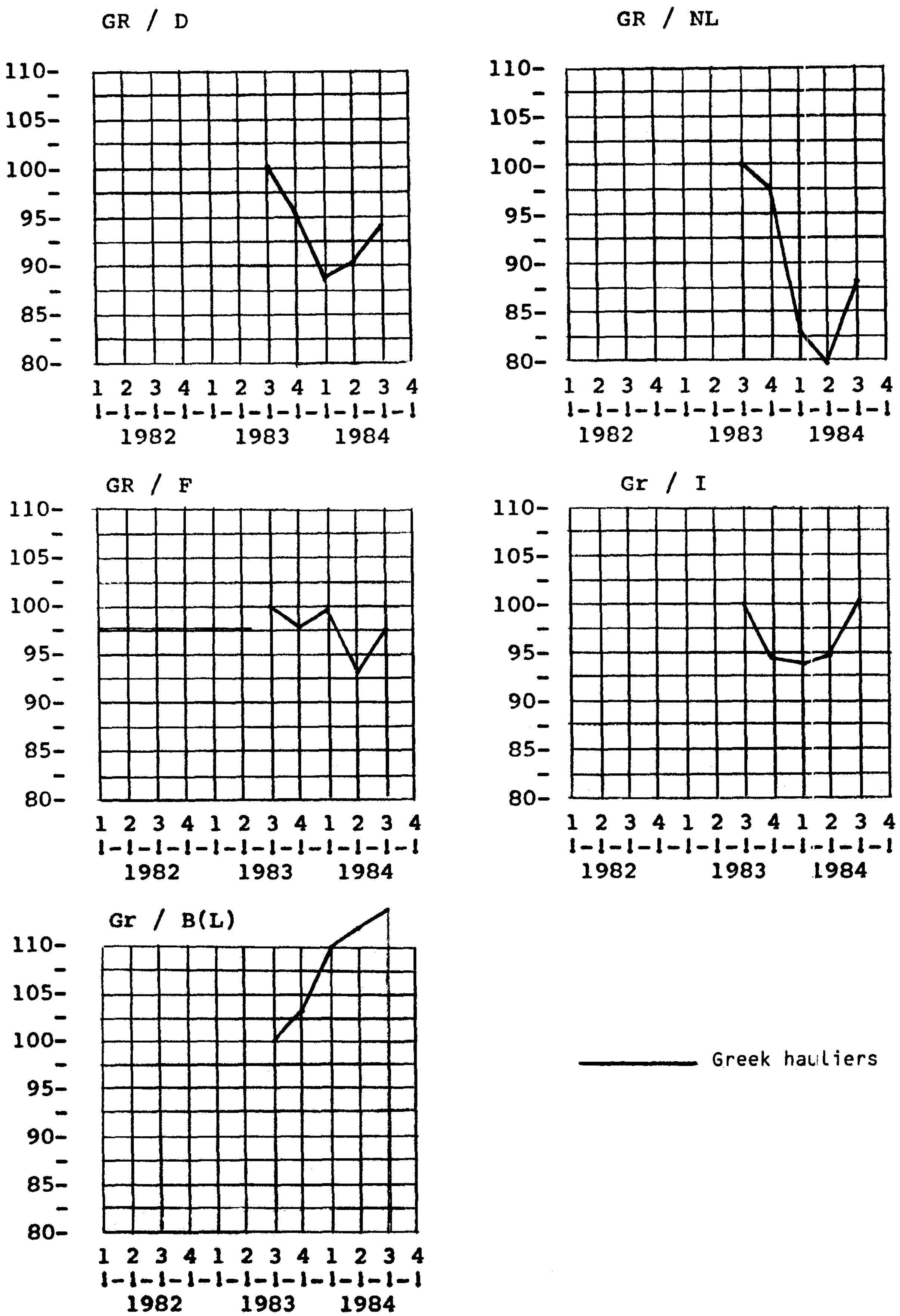
Figure 2.9.: Price Development in relations with Italy



Italian hauliers

Partner country hauliers.

Figure 2.10 : Price Development in relations between GR and D, F,NL,I,B/L



SECTION 3

WATERWAY SURVEYS

3.1. Rhine traffic

3.1.1. Activity

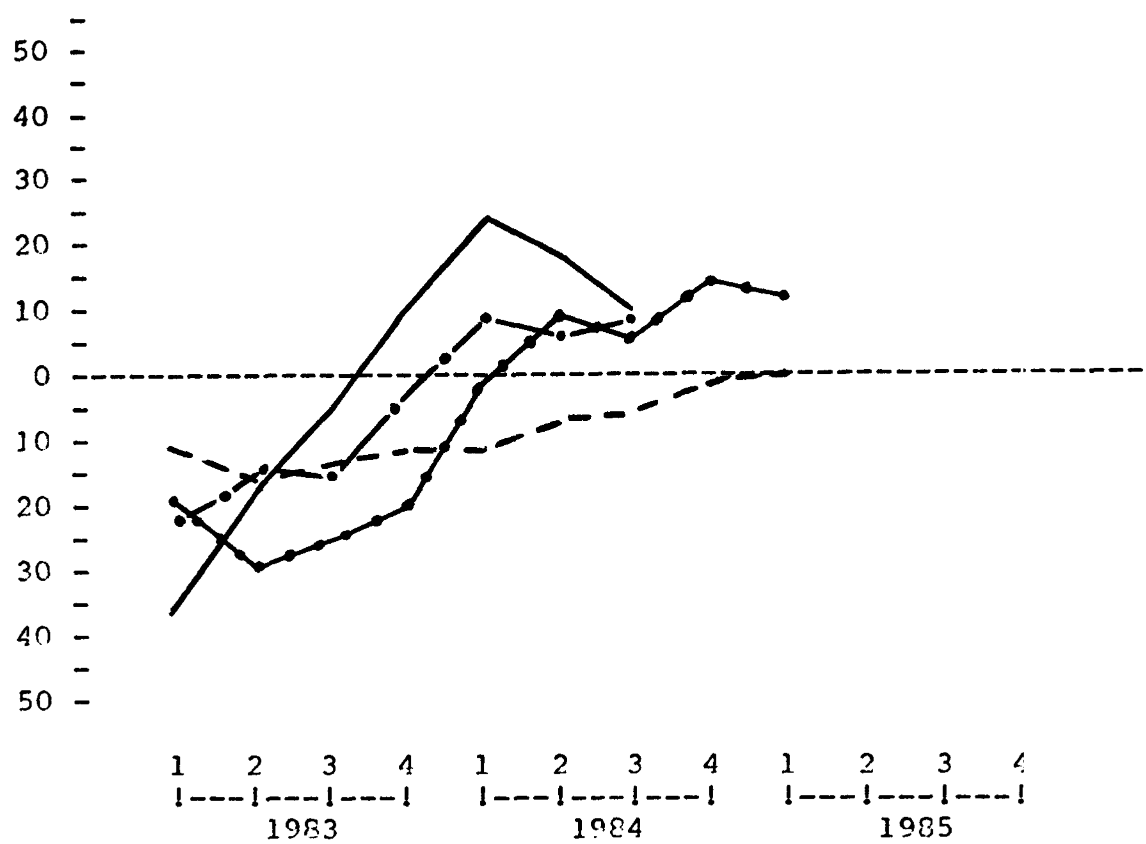
In the opinion of shippers participating in the survey a big decrease in the level of activity was noted during the third quarter 1984. Consequently, the moving average (calculated on the balance of opinion for the last four quarters) decreased also, but is still positive (figure 3.1.). Since 1979, first year of the survey, the third quarter of each year has always shown an important decrease compared with the previous quarter of the same year.

However, international Rhine traffic monitored at the Dutch-German border increased by 5.7% compared with the same quarter of last year.

32.8 mio tonnes passed Emmerich/Lobith which means an increase of 7.0% compared with the second quarter 1984. During the first nine months an increase of 9.9% has been noted; 104.7 mio. tonnes were transported in both directions which is well above the level of activity during the first nine months of 1979 (100.8 mio. tonnes).

Figure 3.1. : Rhine : Indicators of activity and utilisation of capacity (moving averages)

Aggregate balance of opinions (in percentage)



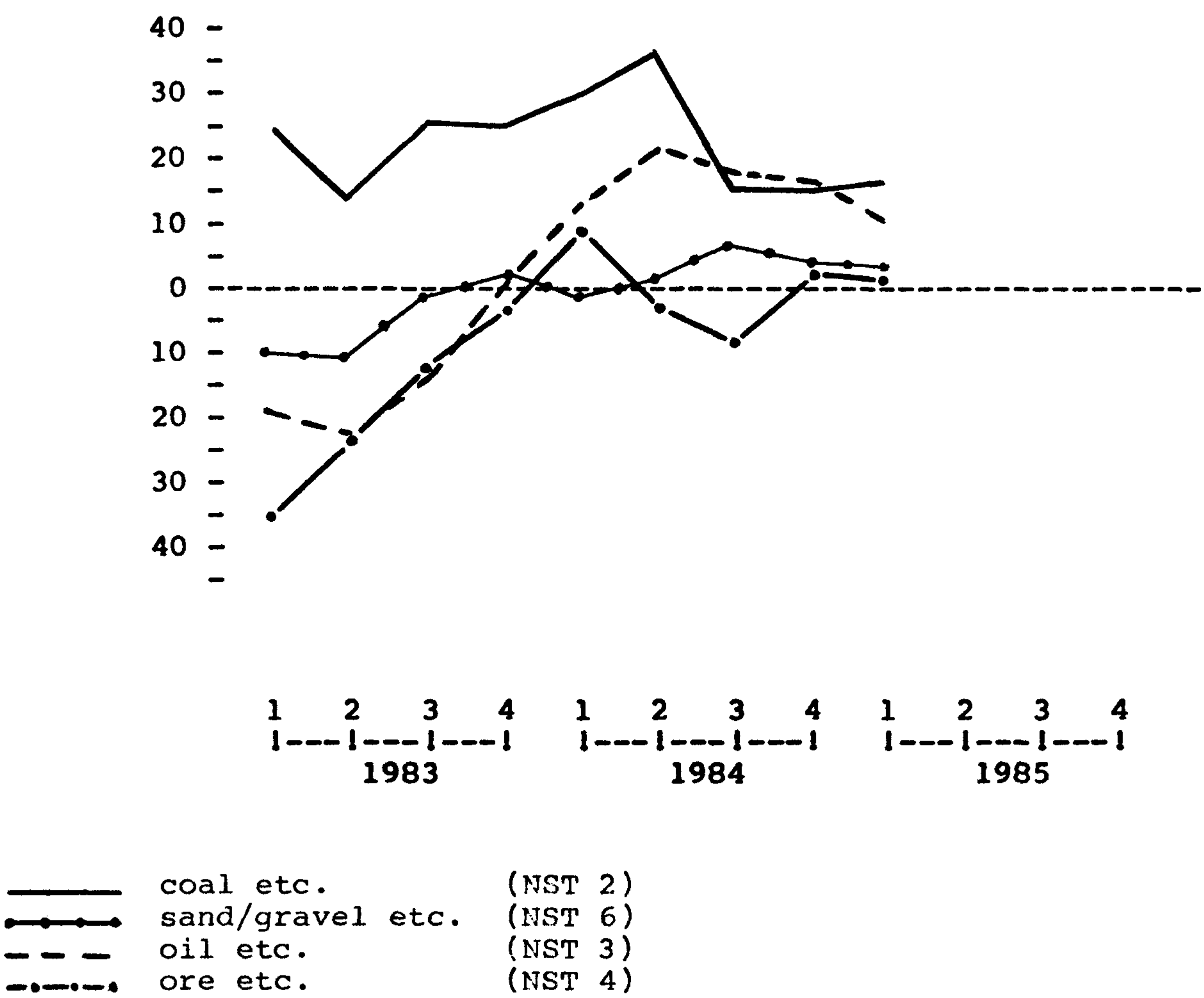
4 quarter moving average actual activity
4 quarter moving average forecast activity
4 quarter moving average actual utilisation of capacity
4 quarter moving average forecast utilisation of capacity

3.1.2. Forecasts

Activity is expected to rise during the first quarter of 1985. Forecast of utilisation of capacity is rising slightly, but is still considered to be at too low a level. Overcapacity is therefore expected to remain.

By important commodity group, forecasts are shown in figure 3.2.

Figure 3.2. : Rhine : Indicators of forecast for 4 important NST-groups (moving averages)



In the opinion of the shippers questioned transport activity will increase only for NST2 (coal). Important decreases are foreseen for NST6 (sand/gravel) and for NST4 (ore). Oil transports are expected to remain stable.

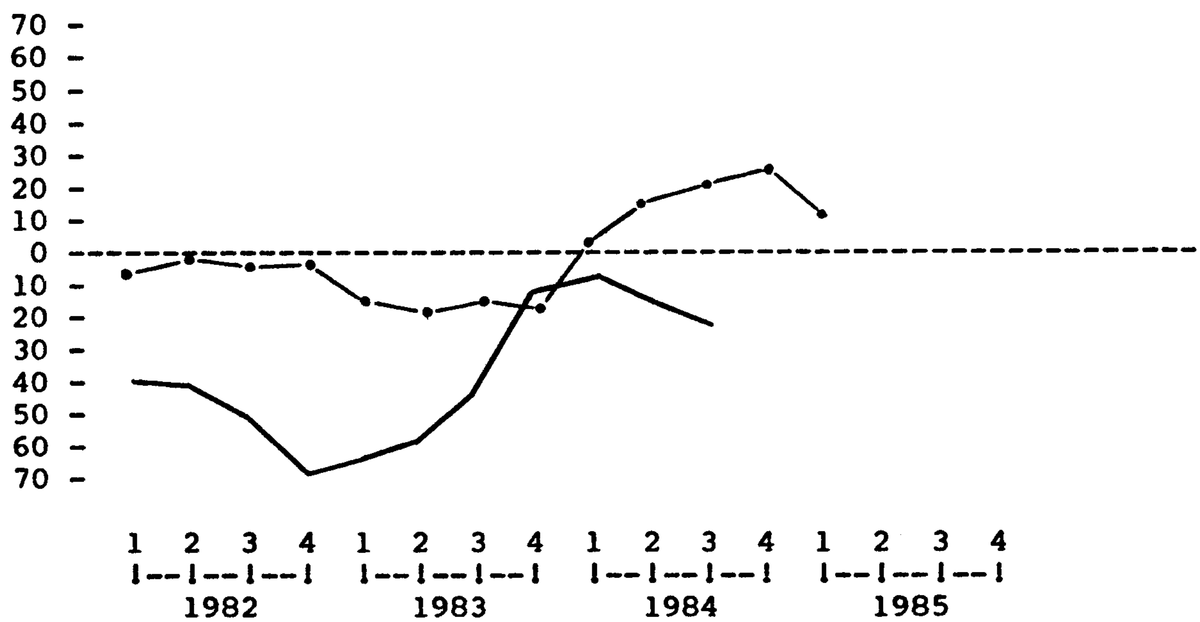
During the first nine months traditional Rhine traffic went up by 6.4%. In particular ores and oil products went up considerably: 22% and 14% respectively. Also traffic of steel products went up by 10%, as well as traffic of NST9 (+21%), coal (+14%) and agricultural products (+9%).

3.1.3. Freight rates

Shippers report that rates decreased strongly during the third quarter 1984. Forecasts for freight rates are also pessimistic. Since 1979 productivity and capacity have increased to the extend that overcapacity still dominated the market in the dry bulk sector.

Figure 3.3 : Rhine : Developments in freight rates (moving average)

Aggregate balance of opinions (in percentage)



Freight rates ————
Forecast freight rates •——•——•

3.2. North-South traffic

3.2.1. The results for the fourth quarter 1984 on the North-South links show an increase compared to the third quarter 1984.

The balance of opinion on demand during 1982, 1983 and 1984 is as follows:

1982				1983				1984			
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
-57	-28	-67	-43	-58	-45	-49	- 3	-39	-24	-43	-25

The time series above clearly show the annual cyclical developments in which the second and fourth quarter show more transport activity than the first and third quarter.
On the other hand the trend becomes clear by comparing the same quarter of different years. As was stated in quarterly report N° 13, the third quarter 1983 was the first quarter during which an upward movement was noted. This positive trend has now stopped in the opinion of the owner/operators.

Although no survey is carried out in France, the statistical data available indicate that transport activity through North-South links, measured in tonnes, decreased by 1.8% for French exports, and decreased by 13.6% for imports compared to the same quarter of last year. In the overall situation, a decrease of 8.7% was noted.

The change in the trend is largely confirmed by the change in the balance of opinions on the various bilateral relations, the fourth quarter 1984 compared with the same quarter of last year as shown in the following table.

Table 3.1. : Changes in activity assessment (difference in respective balance of opinion) by Dutch and Belgian shippers, Q4 1984 over Q4 1983 by bilateral relation.

From \ To	B	F	NL
B	+ 1	-15	-31
F	-13	-	-18
NL	-41	-20	-30

However, French statistics indicate that traffic between France and Belgium decreased (-0.1% for French exports and -1.1% for imports) while traffic between France and the Netherlands increased quite a bit (+21.0% for exports and 7.1% for imports).

Table 3.2.: Changes in activity assessment by Dutch and Belgian shippers Q4 84 over Q4 83 by tonnage class.

Tonnage class	Belgian shippers	Dutch shippers	Total
200- 450	- 12	- 22	- 17
451- 750	- 22	- 21	- 22
751-1150	- 26	- 14	- 21
1151-1550	0	- 65	- 48
1551	0	- 35	- 18

In general, the feeling of the Dutch owner/operators about the situation on the market was more negative than the feeling of the Belgian owner/operators. Both Belgian and Dutch owner/operators are of the opinion that the market situation is still very unsatisfactory.

3.2.2. 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 3.3. and the subsequent figures illustrate the important seasonal and trend changes in this indicator.

Table 3.3. 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	8.5	7.5
	1984	10.5	11.0	9.5	11.5
F	1981	8.5	7.0	15.3	14.0
	1982	9.2	18.0	16.1	12.5
	1983	20.9	17.0	21.0	16.2
	1984	19.0	19.6	22.8	18.6
NL	1981	8.3	4.4	5.6	3.0
	1982	6.5	6.2	9.8	7.1
	1983	6.9	6.9	8.5	4.9
	1984	6.2	6.8	8.5	6.6

The number of waiting days for the Netherlands and France decreased compared to the previous quarter, but for Belgium an important increase is shown. For all countries the number of waiting days was well above the level of the same quarter last year. This confirms the results of the opinion surveys.

The following figures show the development of waiting time on the various bilateral relations during the fourth quarter 1984 in comparison with the fourth quarter 1983.

Figure 3.4.: Weekly average of waiting days in the relation from the Netherlands to Belgium and France, fourth quarter.

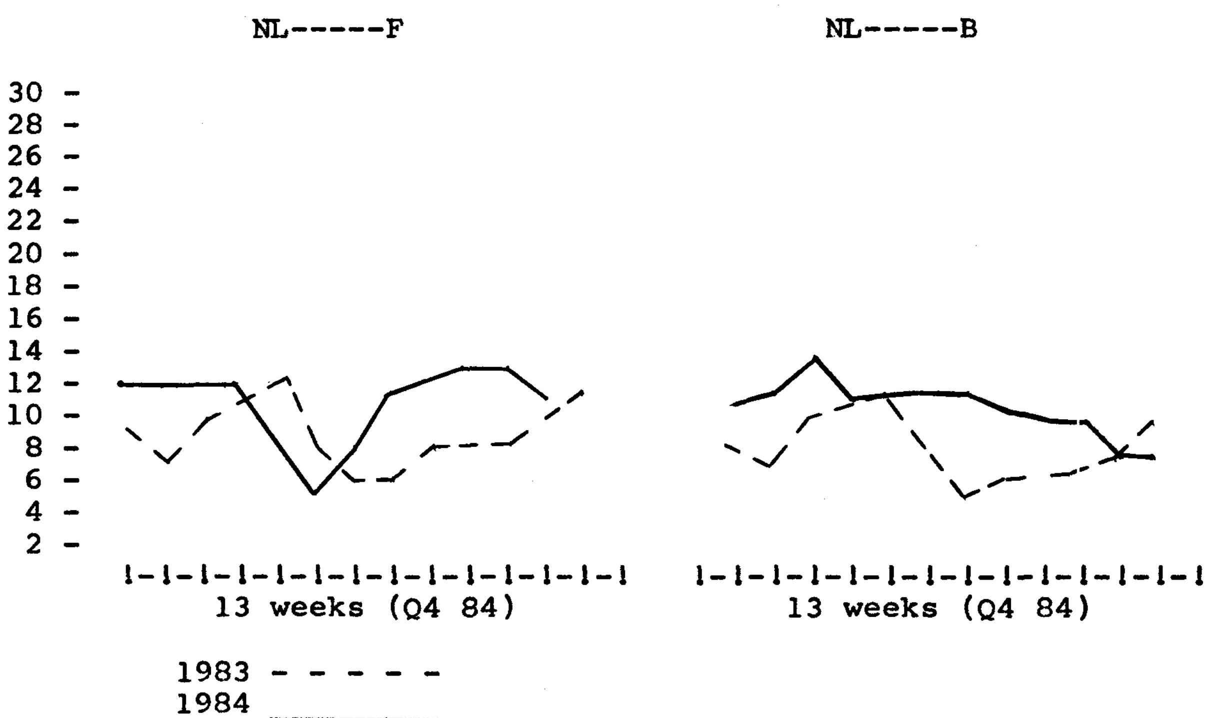


Figure 3.5.: Weekly average of waiting days in North-South traffic, from Belgium to France, including Belgian domestic traffic, and from Belgium to The Netherlands (bourse of Antwerp), fourth quarter.

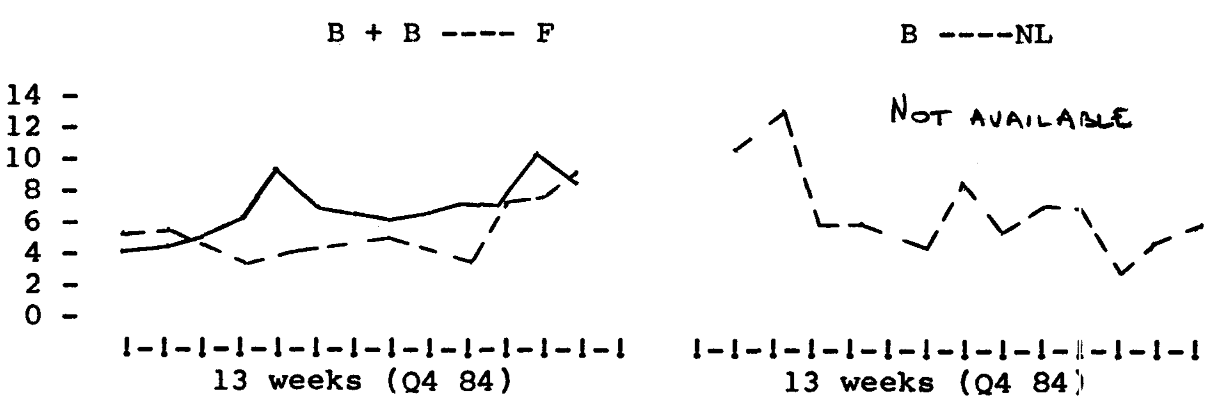
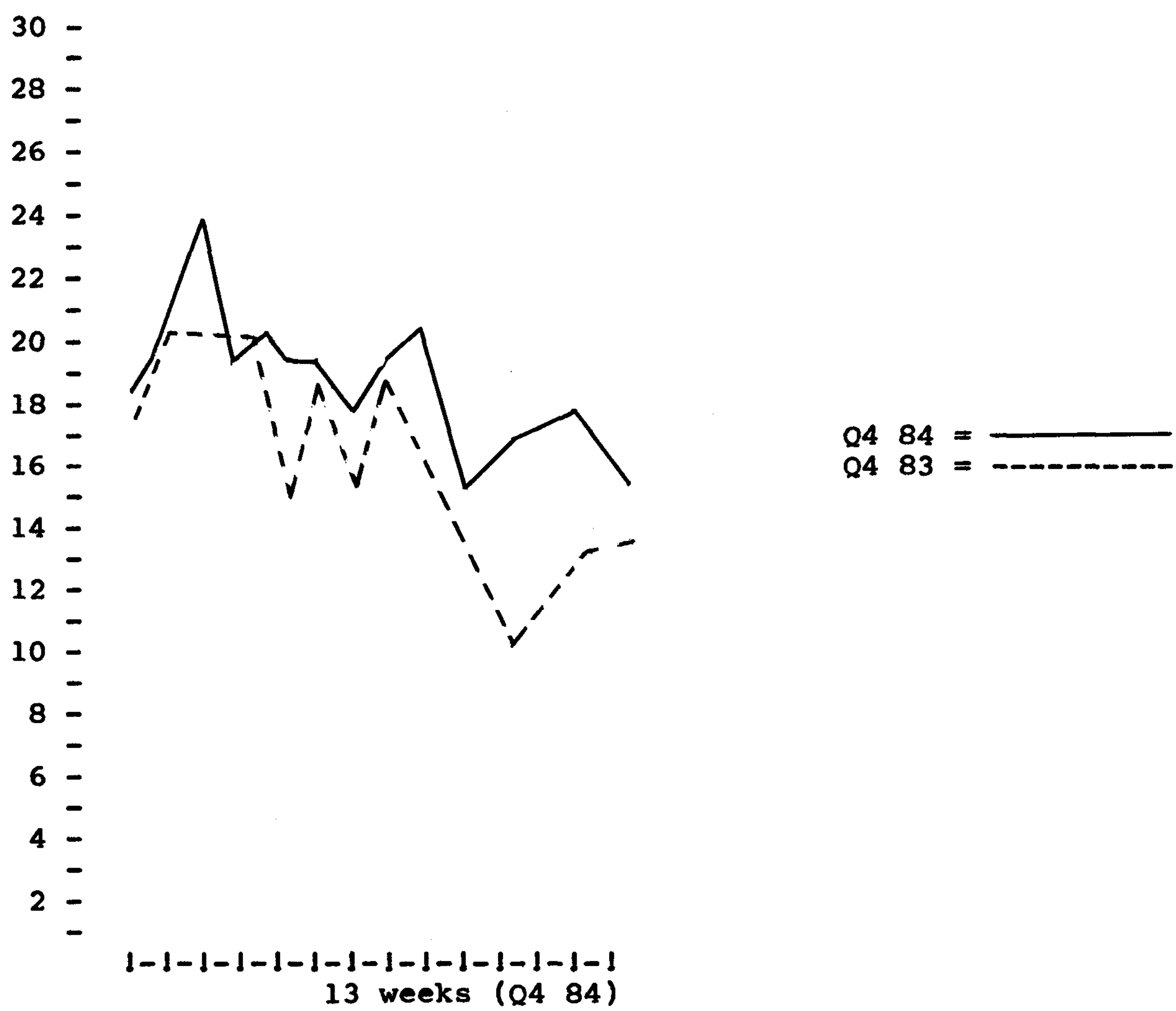


Figure 3.6. Weekly average of waiting days in North-South traffic from France, fourth quarter.

F ------- B, NL



3.2.3. Prices

Freight rates were considered to remain stable during the fourth quarter compared to the previous quarter.

3.2.4. Forecasts : Some improvements compared to Q4 last year.

Forecasts by Belgian and Dutch inland waterway transporters for the first quarter 1985 compared with the fourth quarter last year are less pessimistic. Belgian transporters in particular are less pessimistic. Related to the last quarter 1984 the normal seasonal downturn is expected.

Table 3.4.: Balance of opinion on forecasts of activity in the next quarter.

Quarter/ Country	1983				1984				1985		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
B	-64	-52	-49	+32	-50	-47	-32	+ 4	-28		
NL	-31	-24	-18	+21	-20	+23	-68	- 1	-20		
Total	-42	-33	-28	+28	-32	-6	-24	+ 2	-23		

The same counts for freight rates: up against the same quarter last year; down against the fourth quarter 1984.

Table 3.5. : Balance of opinion on forecasts of freight rates level in the next quarter.

Quarter/ Country	1983				1984				1985		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
B	0	-6	-6	+21	-3	-11	-16	+29	+4		
NL	-10	-12	-13	+35	-35	+19	-6	+20	+12		
Total	-42	-33	-28	+28	-32	+6	-10	+25	+9		

3.3. Cost Indices

The indices published up till now were based on the costs as they were on 1.1.1982. In order to obtain conformity with the figures and indices published by the Central Rhine Commission, this publication will from now on base its indices on costs as they were on 1.1.1979. Also price indices, on which will be reported in the next paragraph, will be based on the price level on that date. This will allow comparisons between cost developments, overall and by market, and price developments, by market and for dry and liquid cargo. By comparing the two, an indication is given on the development of profitability.

In the following tables the same cost indices are published as in Report N° 14, but based on 1.1.1979. For comments as far as the comparison between 1.1.1984 and 1.7.1984 is concerned, reference is made to Report N° 14.

3.3.1. Overall cost developments

Table 3.6. : Overall cost indices and cost indices by market on 1.1.1984 and 1.7.1984 in ECU (1.1.1979=100)

	Overall		Rhine		N-S	
	1.1.84	1.7.84	1.1.84	1.7.84	1.1.84	1.7.84
Wages	142.3	147.2	144.5	140.0	139.1	144.6
Capital	120.9	124.8	124.4	128.5	115.4	119.0
Fuel	257.2	253.2	259.1	258.4	264.3	247.7
Other costs	133.8	136.2	136.6	139.0	129.4	132.0
Total costs	142.6	146.1	146.6	149.9	136.5	140.3

In the last four and a half years, total costs in ECU went up by 46.1%; in Rhine shipping costs went up with 50% while in North/South shipping a cost increase of 40% could be noted. Of the cost elements fuel costs increased 2.5 times. Labour costs increased as much as total costs, while capital and other costs inreased less than average.

Figure 3.7.: Cost indices: overall, Rhine, North/South in ECU (1.1.1979=100)

Overall cost indices ▬▬▬▬
Cost indices Rhine - - - - - -
Cost indices North/South •——•——•

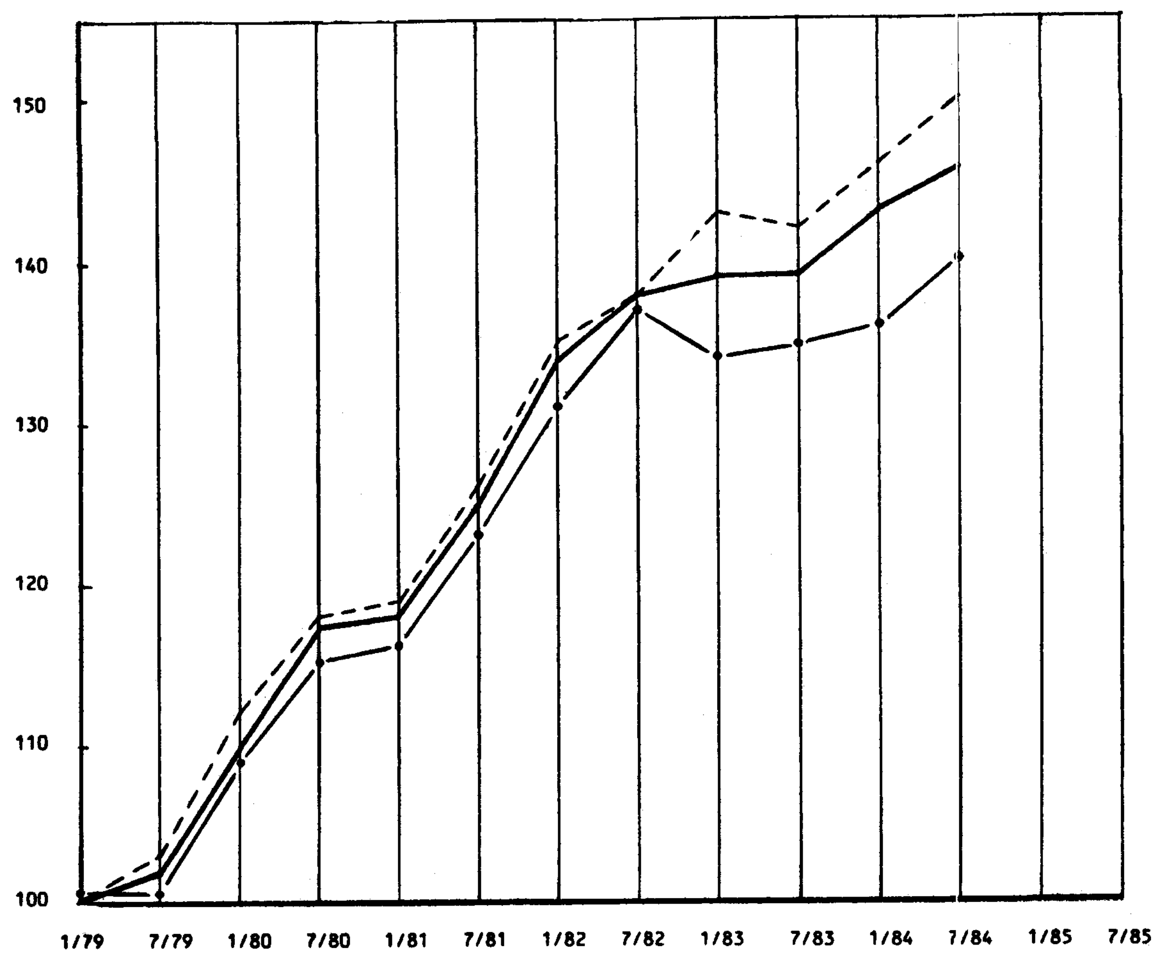


Figure 3.8.: Cost indices by elements (1.1.1979=100)

labour cost
capital cost
fuel costs
other costs

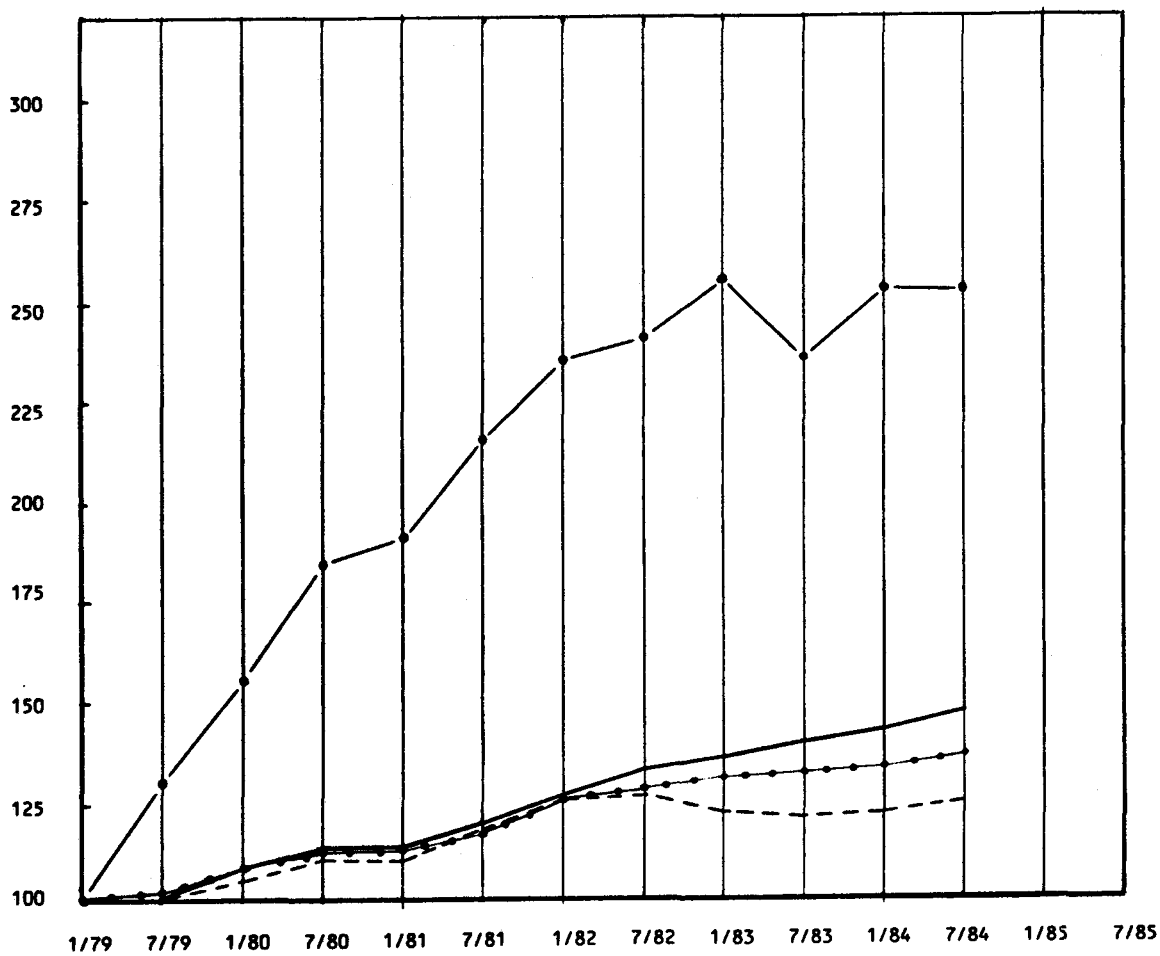


Figure 3.9.: Total costs by nationality of the vessel in national currency (1979=100)

D •——•——
F - - - - - -
NL ————
B •-•-•-•-•

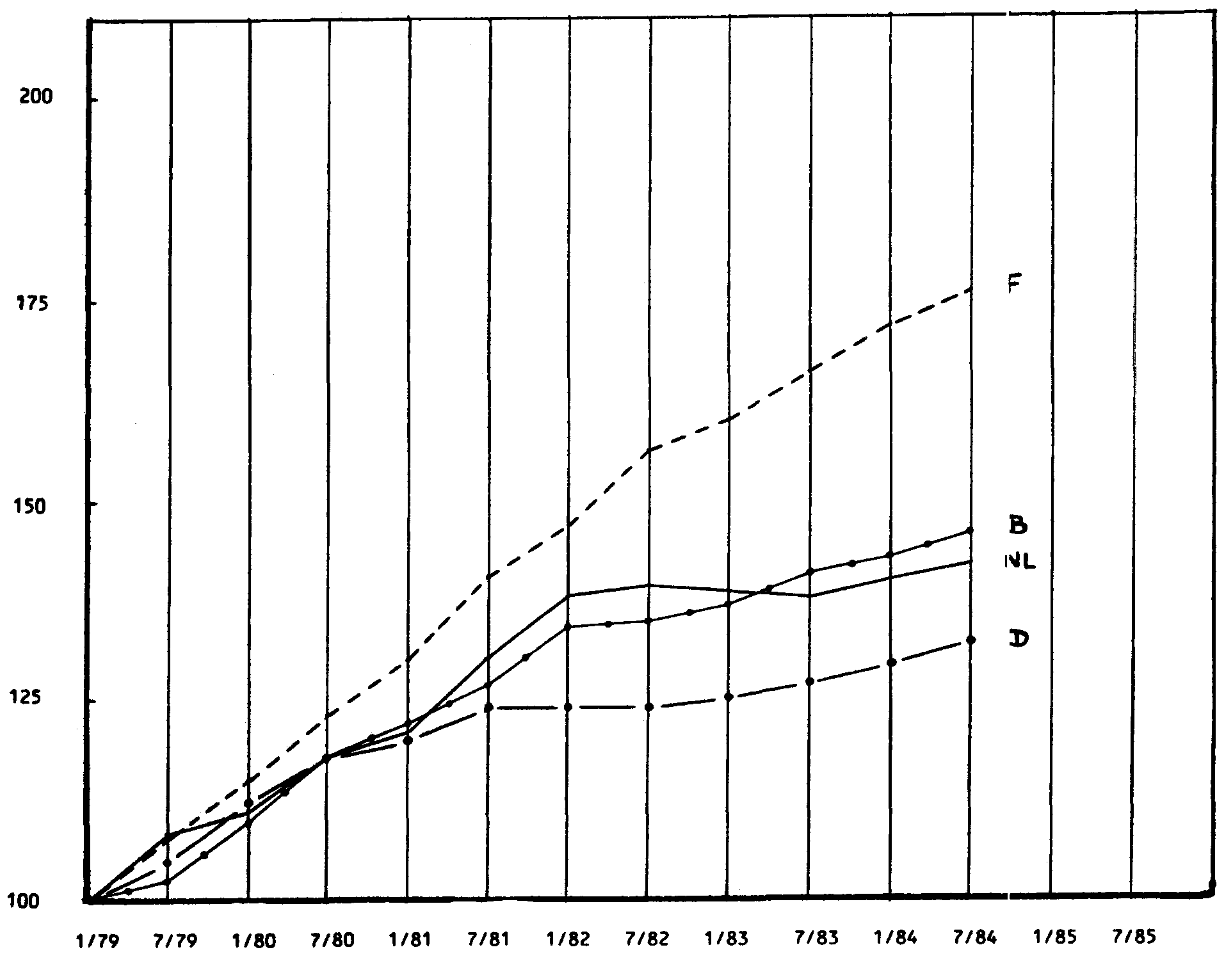
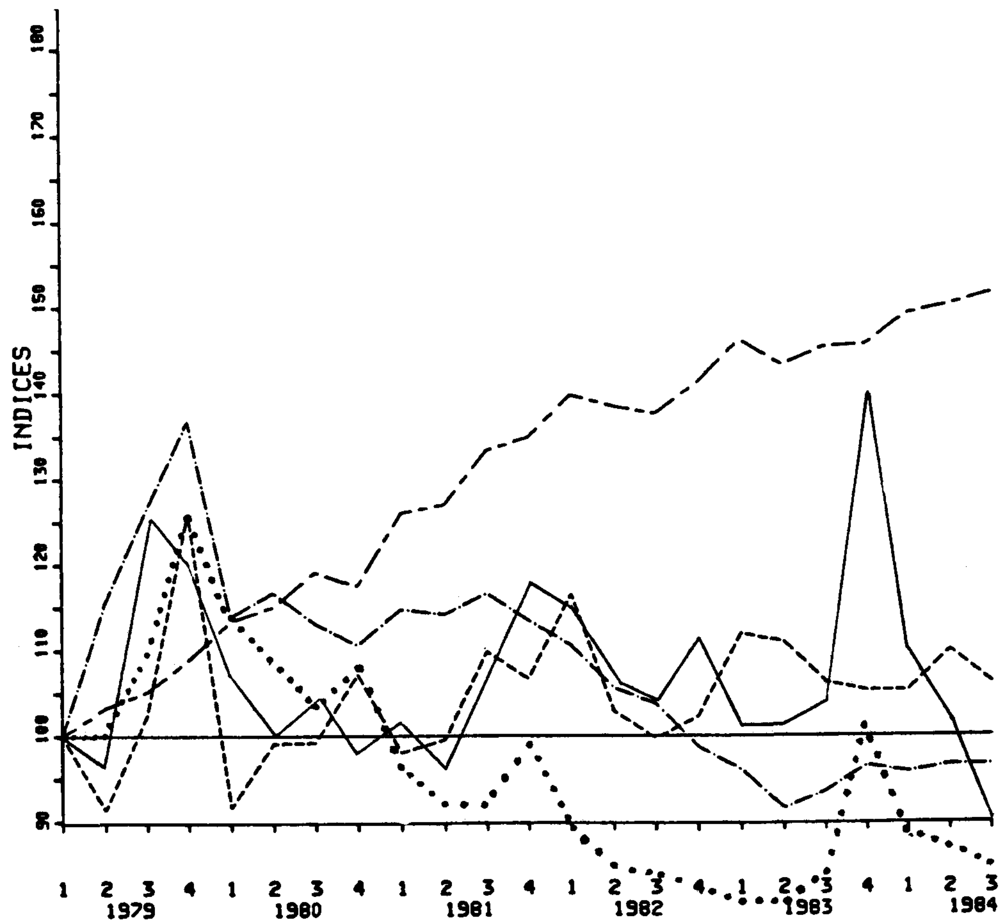


Fig. 3.10. Price indices for dry and liquid cargo on the North/South and Rhine market



sand and gravel North/South —·—·—·—
dry cargo North/South — — — —
haulier cargo North/South - - - - - - -
dry cargo Rhine (upstream) ··········
liquid cargo Rhine (upstream) ————

3.3.2. Cost developments by shiptype

Table 3.7. : Cost indices by ship type on 1.1.1984 and 1.7.1984 in ECU (1.1.1979=100)

	350 t.		600 t.		1200 t.		pusher units	
	1.1.84	1.7.84	1.1.84	1.7.84	1.1.84	1.7.84	1.1.84	1.7.84
Wages	143.5	149.8	132.5	137.5	142.4	147.0	142.7	146.1
Capital	109.5	112.8	120.0	123.6	123.3	127.2	131.8	137.2
Fuel	250.7	247.7	257.4	246.8	259.3	256.3	258.4	258.0
Other costs	128.9	131.9	129.8	132.1	135.3	137.6	136.4	138.4
Total costs	137.4	142.0	133.2	136.8	144.5	147.7	145.3	148.5

In the period considered costs increased less for 600+ ships and most for pusher units. For the bigger shiptypes the incidence of the fuel cost increase was most stongly felt.

3.3.3. Cost developments by flag

Table 3.8. : Total cost indices by nationality of the vessel on 1.1.1984 and 1.7.1984 in national currency (1.1.1979=100).

	B (FB)		D (DM)		F (FF)		NL (HFL)	
	1.1.84	1.7.84	1.1.84	1.7.84	1.1.84	1.7.84	1.1.84	1.7.84
Overall	142.8	146.5	130.0	132.7	172.0	177.5	140.5	141.7
Rhine	144.4	146.-	130.0	132.7	165.2	169.6	142.5	143.9
N-S	142.5	146.5			178.0	182.5	136.6	137.4

By flag there are big differences in cost developments since 1979, due to differences in inflation rates.

The three following figures will show the development over the period 1.1.1979-1.7.1984 of
- overall, Rhine and North/South cost indices,
- the cost elements,
- cost indices by flag.

3.4. Price indices

In this report price indices are published for the first time. The indices published here are limited to the North/South market. However, price indices for the Rhine market are collected by the CCR and are published regularly in the form of figures in their conjunctural surveys. In the table which is reproduced at the end of this paragraph these graphs will be partly reproduced.

As for the costs indices, 1.1.1979 is the base year.

The methodology for the calculation of price indices is comparable to the calculation of cost indices. The calculation is based on actual price developments on 17 international traffic relations representing total international North/South waterway transport. By weighting the various relations, price indices are found for commodity groups and by flag.

3.4.1. Price development by commodity

A first table shows the development of the indices for a number of good categories.

Table 3.9.: Price indices by commodity group in international North/South traffic in ECU (1.1.1979=100)

	1.10.1983	1.07.1984	1.10.1984
liquid cargo	106.3	110.1	106.3
sand and gravel	93.5	96.6	96.6
other dry cargo	145.4	150.4	151.8

The table shows clearly the different developments in the various markets. For liquid cargo, which is a free market, prices went only slightly up since 1979. As far as dry cargo is concerned a clear difference is shown between the mainly free market for sand and gravel - market still depressed because of the depressed building and construction sector - and, on the other hand, the regulated markets with "tour de rôle" systems for other dry cargo commodities: prices for the transport of sand and gravel are 3.4% lower than in 1979; those for other dry cargo commodities are 51.8% higher.

In the following figure price, indices for dry and liquid cargo are presented for the Rhine and the North/South markets. The inluence of the regulated market on the dry cargo indices for the North/South area is clearly shown: while the North/South dry cargo index rose to over 150 in the second quarter 1984, the indices for liquid cargo on the Rhine and North/South and for dry cargo on the Rhine and sand and gravel in both markets, are in the area between 90 and 110.

3.4.2. Price Developments by flag

The following table shows the development of price indices by flag in national currency.

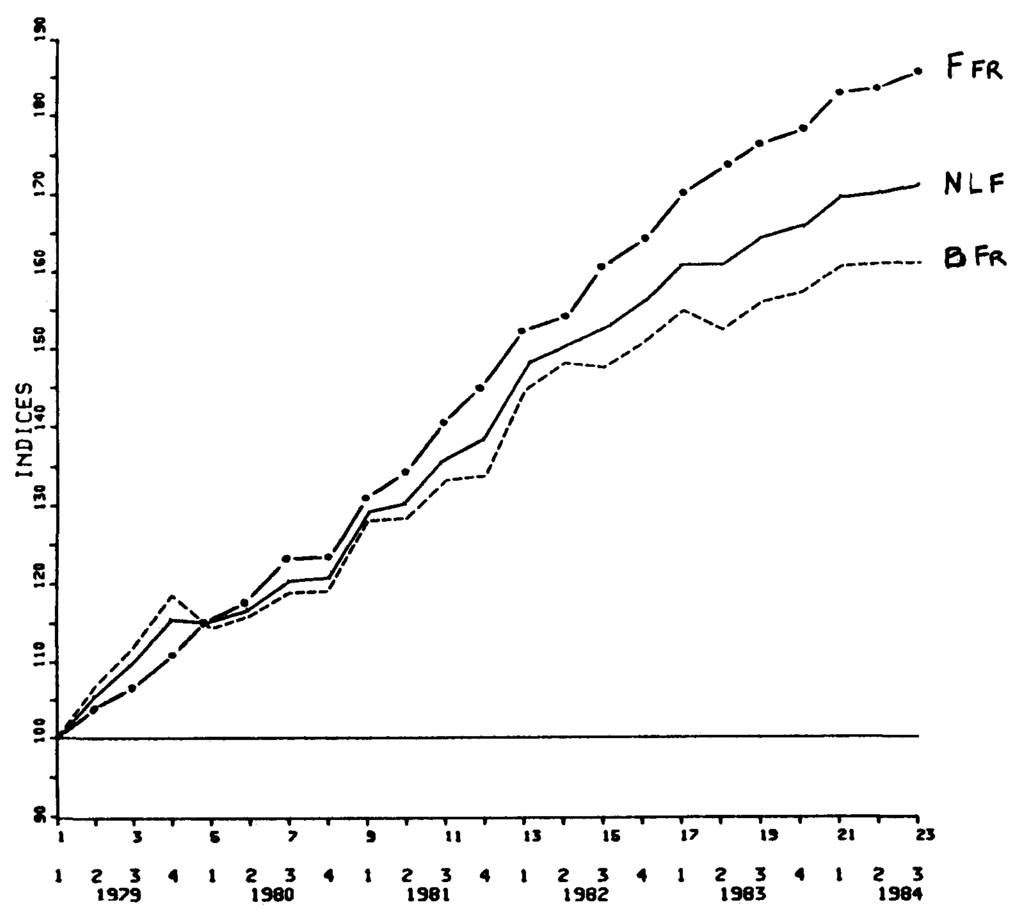
Table 3.10.: Overall price indices by nationality of the vessel in national currency (1.1.1979=100)

	1.10.1983	1.07.1984	1.10.1984
Belgium (BF)	155.8	160.7	160.8
France (FF)	176.2	183.5	185.4
the Netherlands (HFL)	164.1	170.1	171.0

By flag, big differences emerge because of different inflation rates and changes in the relative value of currencies in the ECU, but also because of the different incidence of regulated markets in the total figure.

The next figure shows the development over the years of price indices by flag.

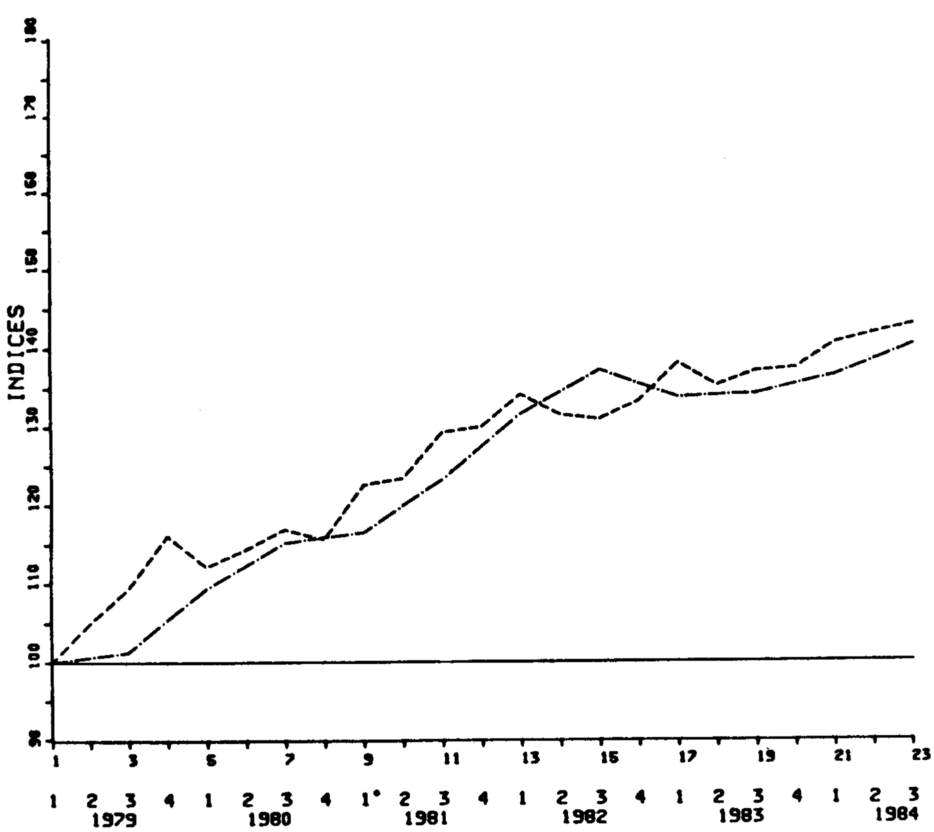
Figure 3.11. Overall price indices in national currency by nationality of the vessel 1979-1984 (1.1.1979=100)



3.5. Price- and Cost indices : profitability

In comparing the cost- and price indices an indication of the development of profitability will emerge. Of course, this does not say anything in absolute terms on the profitability of the sector in real terms, because we do not have any firm statement on the situation at the beginning of 1979. However, on the developments since then something could be said by comparing the two indices. The following figures show the development in the North/South and the Rhine market respectively.

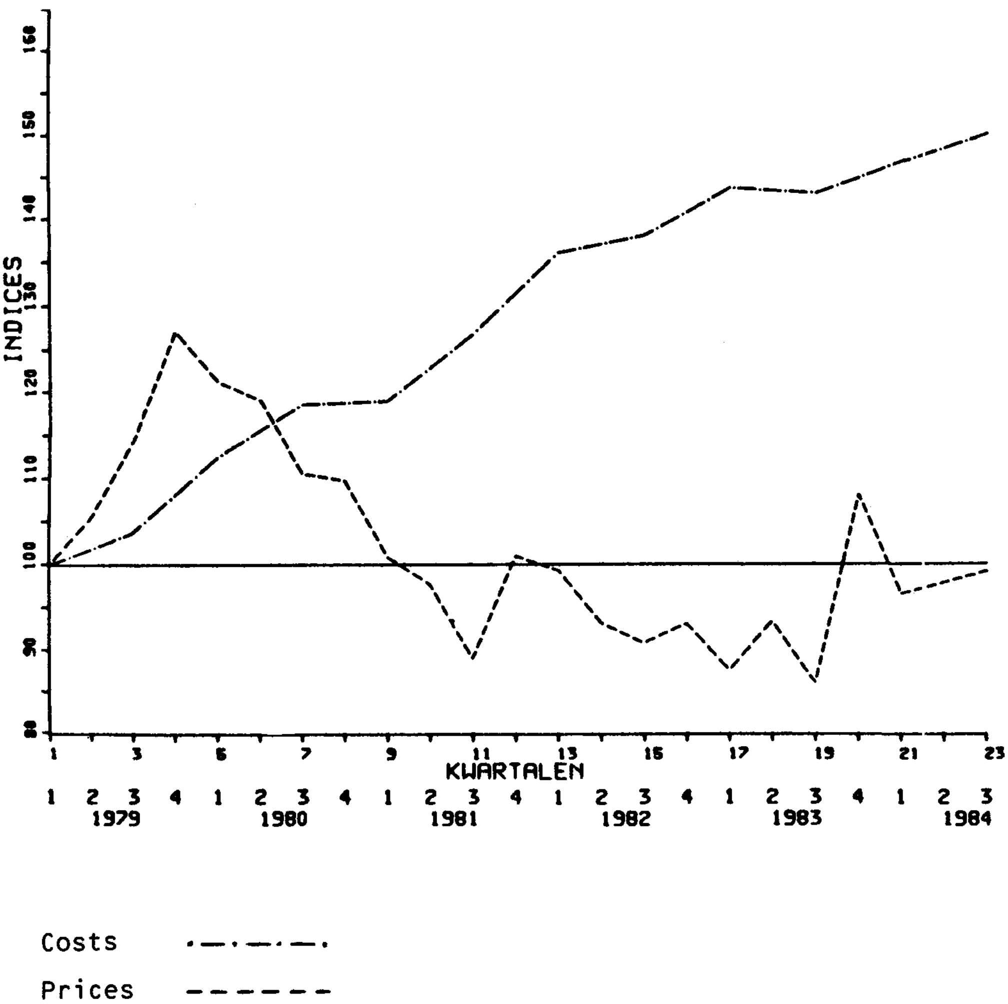
Figure 3.12. Cost and price developments on the North/South market, 1979-1984.



Costs -·-·-·

Prices -------

Figure 3.13. Cost and price developments on the Rhine, 1979-1984



As the two figures show, the price increases were in line with cost increases during the period considered, as far as the North/South is concerned. However, for the Rhine, the overall pricelevel decreased or remained at about the same level over the year, but cost increased. Even with an increase in activity the price situation remained stable. This clearly shows the effects of the overcapacity on that market.

SECTION 4

RAIL SURVEYS

4.1. Rail activity

Table 4.1.: EUR-10 tonnage evolution (in percentages) Q3 84/Q3 83 by transport relation (1)

From \ To	D	F	I	NL	B+L	UK	IRL	DK	GR	EUR 10
D	-	+ 27	+ 26	+ 2	+ 8	- 6	-	+ 3	+ 1	+17.2
F	+ 9	-	+ 31	+ 2	+ 43	+ 5	-	- 10	+ 74	+28.5
I	- 12	- 11	-	- 22	+ 54	- 8	-	- 8	+ 39	- 4.7
NL	+ 23	+ 30	- 2	-	+ 10	+289	-	0	+ 8	+21.4
B+L	+ 18	+ 54	+ 38	+ 33	-	- 2	-	+ 51	+ 23	+37.3
UK	+ 54	+ 39	+ 58	+ 46	+ 25	-	-	N.A.	N.A.	+50.9
IRL	-	-	-	-	-	-	-	-	-	-
DK	- 15	- 18	+232	+ 96	- 6	0	-	-	- 33	- 6.5
GR	+ 93	- 12	+ 32	- 27	0	N.A.	-	N.A.	-	+58.8
EUR 10	+ 9.6	+30.7	+29.6	+11.3	+26.9	+ 0.9	-	+ 4.3	+28.0	+22.0

N.A. = not available

International intra EUR-10 rail transport of goods increased by 22% in the third quarter of 1984 compared to the same quarter of the previous year.
It was the highest increase recorded for rail for several years. On one hand it has to be underlined that the tonnage in the third quarter of 1983 was particularly low, which explains part of this 22% boom-figure.
On the other hand, as shown in Figure 1.2 of section 1, intra-EUR-10 international rail traffic of goods did not suffer from the usual seasonal drop in the third quarter of the year what tends to prove that Q3 84 was exceptionally high anyway. For the first nine months of the year 1984, the total tonnage increase was 16% on the same period of 1983.

(1) Excluding B-L and L-B.

4.2. Railway Price Indices

4.2.1. Coverage

Price surveys are now being carried out in Germany, France, Italy, Belgium and Netherlands. The five railways agreed on the method of a "basket" of representative commodities defined for each directed relation from actual traffic data for the reference period (1981).
Fot this report, the Dutch and Italian contributions were not available.

4.2.2. Price developments by relation

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

A) SNCF's Elaboration

France-Belgium

31.12.81	30.9.83	31.12.83	31.3.84	30.6.84	30.9.84	31.12.84
100	117.71	125.21	126.56	126.56	129.04	133.57

For the 9 representative commodities of this relation, the evolution of price indices varies considerably for both carriers. For SNCF it is between 27-42% and for SNCB it is between 32-35% (since the 31.12.81). For wheat and cereals there was no change in the tariffs from the previous quarter for the two sectors. For the other representative commodities in the Belgian sector there is change of about 6% in the tariffs from the previous quarter and in the French sector the change is between 4-9%.

France-Netherlands

31.12.81	30.9.83	31.12.83	31.3.84	30.6.84	30.9.84	31.12.84
100	119.90	121.64	122.16	122.16	125.63	127.51

Except for maize and animal fodder which show for the both sectors an average increase of 41% since 31.12.1981, for the other five of the seven representative commodities in the Netherlands sector, the price index has been about 1-2% and in the French sector about 24% from the base established on 31.12.81.

France-Germany

31.12.81	30.9.83	31.12.83	31.3.84	30.6.84	30.9.84	31.12.84
100	114.13	115.71	117.61	117.61	118.08	121.10

For all the representative commodities in the German sector, there was no change in the tariffs since the second quarter of 1983. Thus the price indices continue to show an increase of 5-12% since 31.12.81. Compared to the third quarter of 1984 in the French sector, there was a change of about 4% in the tariffs of almost all the representative commodities. Thus the increase is between 25-32% since 31.12.81. (except cars: 69%).

France-Italy

31.12.81	30.9.83	31.12.83	31.3.84	30.6.84	30.9.84	31.12.84
100	132.26	134.12	135.97	135.97	137.19	144.00

In the fourth quarter of 1984 the evolution of price indices on the French sector shows an average increase of 30-32% since 31.12.1981 (except rail-road 48%). Compared to the third quarter of 1984 there was a change in the tariffs for most of the representative commoditites, so that figures show an increase of about 4%. On the Italian sector the price index increased up to 76% since 31.12.1981 (except sand 85%); there was a change of about 15% on the previous quarter.

B) DB's Elaboration

Except for the Germany-France relation, there was no change from the previous quarter.

Germany-France

31.12.81	30.9.83	31.12.83	31.3.84	30.6.84	30.9.84	31.12.84
100	113.98	115.68	118.96	118.96	118.96	120.65

Germany-Belgium

31.12.81	30.9.83	31.12.83	31.3.84	30.6.84	30.9.84	31.12.84
100	112.24	112.24	114.06	115.84	116.99	116.99

Germany-Netherlands

31.12.81	30.9.83	30.12.83	31.3.83	30.6.84	30.9.84	31.12.84
100	111.16	111.16	114.21	114.21	114.21	114.21

Germany-Luxembourg

31.12.81	31.12.83	31.3.84	30.6.84	30.9.84	31.12.84
100	109.02	111.44	111.44	111.44	111.44

C) SNCB's Elaboration

Belgium-France

31.12.81	31.12.83	31.3.84	30.6.84	30.9.84	31.12.84
100	125.05	125.84	125.84	127.95	132.59

Belgium-Netherlands

31.12.81	30.9.83	31.12.83	31.3.84	30.6.84	30.9.84	31.12.84
100	116.29	116.29	119.50	119.50	123.58	123.58

Belgium-Germany

31.12.81	31.12.83	31.03.84	30.06.84	30.9.84	31.12.84
100	120.83	121.58	121.95	121.95	121.95

Belgium-Italy

31.12.81	30.9.83	31.12.83	31.3.84	30.6.84	30.9.84	31.12.84
100	124.92	129.28	130.98	130.98	132.60	136.16

For the 13 representative commodities of this relation, the evolution of price indices varies considerably for both carriers. For SNCB it is between 19-45% and for FS it is between 54-80% (since the 31.12.1981). Following SNCB there was no change in the tariffs for this quarter. For FS there was an increase of about 15% on the previous quarter for all the representative commodities.

SECTION 5

COMBINED TRANSPORT

5.1. Container traffic Q4 84

The fourth quarter of 1984 maintained the strong trend of the year. Intercontainer's traffic in 20' units (TEU) being with 219 500 TEU 11% higher than in 3/84 and 7% above 4/83. This resulted in a record year with 824 800 TEU, 8.7% higher than 1983. The year's growth was carried principally by traffic to and from container ports, up by 7.6% and continental (inner-European) traffic, up by 10.6%

Recent trends and developments include the handling of land transport requirements for round-the-world shipping services, which have required numerous special trains. The sustained high level of Europe-US trade, and rationalisation projects of certain container shipping lines, have also led to rail traffic increases.

Continental traffic has increased on routes to and from Scandinavia, Italy (especially tank container traffic from France and the Federal Republic of Germany), Spain and on the trunk routes between Belgium and Italy and between the Netherlands and Italy.
Movements of swap bodies have also increased by some 20%.

Anglo-Italian traffic has also, after a prolonged decline, increased by 2.9%, the first net increase for five years.
Container traffic by rail to and from the USSR-frontiers, in connection with Transsiberian and other USSR-routes, increased by 15%, new traffic between Europe and the Chinese Peoples' Republic compensating the lower level of Far-East/European movements.

Projection for 1985, based on present traffics and known developments during the year, suggest that border crossing rail container traffic with Intercontainer in 1985 could reach around 875 000 TEU, with an increase trend towards regular complete trainload operations.

5.2. Piggy-back transport

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.
The third quarter of 1984, compared to the second quarter of 1984, shows a severe decrease of -10% in the overall growth rate.

5.2.1. International traffic by companies based in the Community

Country of despatch		Units despatched Q3/84	% change from Q2/84	% change from Q3/83
Kombiverkehr	D	15913	- 9	27
Novatrans	F	2057	- 1	-35
	I(except to D)	4718	- 9	-12*
	UK	1498	- 1	12
FERPAC	I (to D)	2368	-20	11
Trailstar	NL	1172	2	3
TRW	B	3501	- 4	22
Total		37381	-10	17*

While there were some exceptions in different relations, total traffic figures for all the companies were negative in the third quarter of 1984 compared to the second quarter of 1984.

Kombiverkehr in this quarter achieved a 43% share of the market. In this company, since 1.1.83, border crossing traffics SP/F were considered in the D/SP relation, and the total number of units despatched for this relation was 2552. Novatrans, trading in Italy, has a considerable decrease of -9% in total traffic due mostly to the I/F relation.

For Trailstar, after a bad second quarter, the level of units despatched in the third quarter of 1984 shows again positive figures but for Ferpac and TRW the figures are still negative.

* In Q3/83 we do not have the units of the Italy/Belgium relation.

5.2.2. Important intra-Community relations (over 850 units in Q3/84)

Relation	Units despatched Q3/84	% change from Q2/84	Q3/83
D ------ I	7171	-16	28
F ------ I	1054	-14	-53
I ------ F	1019	-20	-39
I ------ UK	1540	- 8	24
I ------ D	2368	-20	11
UK ------ I	1453	- 1	10
I ------ B	2159	- 4	*
N ------ I	897	1	- 1
B ------ I	2272	- 3	24
Total	19933		

* In Q3/83 we do not have the units of the Italy/Belgium relation.

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(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 University College, Dublin
I Centro Studi sui Sistemi di Trasporto
L Service central de la Statistique et des Etudes économiques
NL Economisch Bureau voor het Weg- en Watervervoer
UK Department of Transport

(b) Road Cost Survey

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) Inland Waterway Cost Survey

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

(f) Rail Price Indices

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

(g) Combined Transport

Intercontainer (container transport)
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