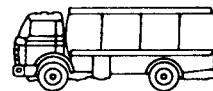


EUROPEAN COMMUNITIES

EUROPA TRANSPORT



OBSERVATION OF TRANSPORT MARKETS

ANNUAL REPORT 1982



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CORRIGENDUM

Page 65, table 4.4., should read as follows

Table 4.4. : Importance of NST-Categories for rail activity in
1982 (EC-9)

	share (%)
NST 0	7.7
NST 1	4.2
NST 2	13.4
NST 3	1.4
NST 4	21.9
NST 5	19.1
NST 6	7.0
NST 7	4.1
NST 8	6.0
NST 9	15.2
TOTAL	100.0

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PRESENTATION OF THE 1982 ANNUAL REPORT

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

- Analysis and Forecasts
- Annual Report
- Market Developments

The contents of this Annual Report are as follows:

Chapter 1: General Market Assessment and prospects

Chapter 2: Road

Chapter 3: Inland Waterways

Chapter 4: Rail

Chapter 5: Combined Transport

Chapter 6: Geographical structure of the traffic flows.

CHAPTER 1

GENERAL MARKET ASSESSMENT AND PROSPECTS

1.1. Figures for international transport within the Community in 1982 show a drop in total tonnage for the three modes for the third successive year, and this total is nearly 1.0% down on that recorded in 1978. Road was the only mode to record a positive figure in 1982 (up 1.2%), demonstrating its inherent flexibility, its capacity to respond more quickly to a changing market situation which is denied the other two modes by virtue of the nature of the goods that they carry. Rail has had another very bad year, more than 10% down on 1981, and has now shed 24% of its annual tonnage since 1979. Inland waterways, too, has suffered, losing 2.7% on the 1981 total. The net effect of all this was that the total tonnage moved between Member States (1) in 1982 was 2.5% down on 1981 with around 391 million tonnes carried.

Table 1.1.: Annual growth rates-EUR-7 tonnage flows (%)

Year/Year Mode	1979/1978	1980/1979	1981/1980	1982/1981
Road	+8.0	+2.5	-0.9	+1.2
Rail	+21.1	-9.0	-7.6	-10.4
I.W.	+1.0	-0.2	-3.7	-2.7
Total	+6.8	-0.9	-3.3	-2.5

(1) Germany, France, Italy, the Netherlands, Denmark and the Belgium/Luxembourg Economic Union.

1.2. The situation shows no signs of improving. As can be seen in table 1.2. The first quarter of 1982 excepted, each quarter was down on the corresponding quarter of the previous year and the overall trend was downwards.

Table 1.2.: 1982 growth rates by mode of transport (percentage change of particular quarter on the corresponding quarter of the previous year)

Mode	Quarter year on quarter year		Q2 Q2		Q3 Q3		Q4 Q4	
	Q1 1982/1981	Q1 1982/1981	1982/1981	1982/1981	1982/1981	Q3 1982/1981	Q4 1982/1981	Q4 1982/1981
Road	+2.9		+1.3		0.0		+0.4	
Rail	-2.7		-10.2		-21.9		-7.8	
I.W.	+0.1		-3.9		+0.1		-6.7	

1.3. Modal Developments

Road haulage was the only transport mode in 1982 to show an increase over 1981 in the amount of freight tonnage carried. German hauliers had a good year, especially with France and Italy, and Belgian and Luxembourg hauliers also seemed to have had a better year. Dutch hauliers, despite experiencing a mixed year, continued to dominate the markets with other Member States.

Rail freight dropped more than 10% in 1982, and a further fall is forecast for 1983. Germany seems to be the country worst affected.

Inland waterways also fell in 1982 with the important Netherlands to Germany relation falling heavily in the second half of the year.

1.4. Modal Split

Table 1.3. shows annual modal split development since 1978. Road continues to increase its share at the expense of the other two modes.

Table 1.3.: Modal Split evolution

Year	Road	Rail	I.W.	Total
1978	35.7	16.7	47.6	100
1979	36.1	18.9	45.0	100
1980	37.3	17.4	45.1	100
1981	38.3	16.6	45.1	100
1982	39.9	15.4	44.7	100

1.5. Forecasts for 1983

Forecasts for the three modes of transport for 1983 have been presented already in the report "Analysis and Forecasts" earlier this year.

To remind the reader of the main results published in the report "Analysis and Forecasts", a summary is given below.

Table 1.4.

Year Mode	1982	1983	Growth rate
Road	174.8	178.2	+2.0
Rail	62.8	60.7	-3.4
I.W.	177.2	175.0	-1.2
Total	414.8	413.9	-0.2

Of all three modes only road transport shows positive growth. In 1983 road transport is forecast to have the largest relative share of all these modes, pushing inland waterway transport into second place.

CHAPTER 2

ROAD

2.1. Market

2.1.1. Introduction

International road transport between Member States grew strongly in the first half of 1982, but petered out in the second half. For the whole of 1982, intra-Community tonnage is estimated to have grown by 1.5% as compared to 1981. The downturn affected other modes more severely, however, so that the share of road transport grew from 40.5% to 42.2%; this growth was exactly in line with preliminary estimates.

Road traffic within the central part of the Community (Germany, France, the Netherlands, Belgium and Luxembourg) which accounts for about 75% of intra-Community tonnage, was however virtually unchanged, rising less than 0.1%.

In the peripheral Member States, except Greece, there were however substantial increases especially with regard to inward traffic from the rest of the Community (Italy, 3%; Denmark, 8%; United Kingdom, 13%; and Ireland, 14%). In the case of Greece, there was an overall fall of 16%, and in the outward direction as much as 22%.

2.1.2 Analysis by country of haulier

German hauliers

1982 was a good year for German hauliers. Although the change in German traffic (+2.6% outwards, -1.1% inwards) was near the Community average, German hauliers managed to increase sharply their share of the market by over 2% in both directions so as to exceed 40%. Consequently the tonnages carried by German hauliers increased by 4% for inward traffic (17.6 to 18.3 mio t) and by 9% for outward traffic (15.9 to 17.3 mio t).

This strong performance by German hauliers was principally due to the important relations with France and Italy where the German share rose by 4-5%. While the change in the Italian market followed several years of stability in market share, the change in the French market continues recent trends which have raised the German share since 1979 from 49.0% to 57.9% in the case of imports and from 43.9% to 55.1% in the case of exports.

French hauliers

1982 was another bad year for French hauliers. Although inward French traffic rose by just above the Community average, outward flows actually fell. Further, the French share of these weak markets fell by 5% in the case of the German market and by 1% to 3% in almost all other markets.

The results of the Business Opinion Survey are consistent with the above, given that the French hauliers are always very pessimistic.

Italian hauliers

According to non-Italian sources, the Italian share of the French and Dutch markets rose by about 3%, the improvement being for traffic both to and from Italy. On the German market, however, the Italian share declined by nearly 4% in the case of traffic from Italy and by nearly 6% in the reverse direction. The results of the Business Opinion Survey show that the Italian hauliers continue to be amongst the most pessimistic in the Community.

Dutch hauliers

Although Dutch hauliers continued to dominate the markets with other Member States, there has been no major change in the Dutch share of these markets in 1982. At the detailed level, the exact picture is less clear and the results from the partner Member State are often inconsistent. It is, in fact, necessary to treat the Dutch results with some caution because of the high proportion of "nationality unknown" (over 50% in the case of outward Dutch traffic).

On the important German market, the Dutch share of traffic to Germany fell by around 1%; however in the reverse direction, the results are less consistent, with the Dutch and German results showing a "decline of nearly 2%" and increase of 0.5%" respectively in the Dutch share.

On the French market, the results are also difficult to interpret especially for traffic from France where the Dutch results show a fall of 2% in the Dutch share and the French results show a fall of 1% in the French share. For the traffic to France, the Dutch share has increased, 2% according to French results, but by 0.5% according to Dutch results; this discrepancy may be due to the 43% "unknown nationality" in the Dutch data.

On the Italian market the Dutch share fell around 2% in both directions, but on the Danish market the Dutch share increased sharply for traffic from Denmark but continued to fall in the case of traffic to Denmark.

Belgian and Luxembourg hauliers

Data for Belgian and Luxembourg hauliers is only available from German and French sources for the relations concerned; in the case of the French source it is not possible to treat Belgian and Luxembourg hauliers separately.

On the German market, which grew by about 3%, the Belgian hauliers saw their share fall by about 1.5%; the Luxembourg hauliers, however, managed to increase their share of the traffic to Germany by 2%, in the reverse direction there was little change in the share.

On the French market which rose strongly by about 6% Belgian and Luxembourg hauliers continued to increase their share of traffic to France by 2%, but in the reverse direction their share which had grown sharply the previous year fell back 1%.

From this limited information, it appears that 1982 was a better year for Belgian and Luxembourg hauliers; this is consistent with the results in the Business Opinion Survey.

United Kingdom hauliers

The number of United Kingdom registered powered vehicles on ro/ro ferries to Mainland Europe rose 4% in 1982 to 181,000, just exceeding the previous highest level of 179,000 recorded in 1979. However as the total market increased by 9% to 352,000, the share of United Kingdom hauliers fell from 54% to 51%. Unaccompanied trailers continued to show an even faster rate of expansion (up 18%), but the nationality of these hauliers is unknown; total movements terms increased by 13%. In 1982, the tonnage to and from the United Kingdom carried by the United Kingdom hauliers remained unchanged at 4.0 million tonnes, whereas carryings by other hauliers increased from 4.4 to 4.9 million tonnes.

Despite this somewhat mediocre performance on a rising market, United Kingdom hauliers were the most consistently optimistic in the Business Opinion Survey.

Irish hauliers

Information from Irish sources on outward ro-ro traffic (i.e. excluding traffic with Northern Ireland) and also excluding company owned trailer traffic shows an overall fall of 11% in 1982. The fall to UK destinations was however quite severe at 31% while traffic to continental destinations grew by 27%; the share of traffic with UK destinations thus fell from 66% to 50%, a remarkable switch in one year.

Among continental destinations, the French market is the most important, this grew by 34% and now accounts for about half of all continental destinations. While the Benelux market only grew 2% and the German market by 10%, the smaller Italian market had a spectacular growth of 65%.

Data from other sources suggests that the Irish share of the continental markets has been under pressure. This is consistent with the Business Opinion Survey which shows continued pessimism of Irish hauliers.

Danish hauliers

Information from non-Danish sources enables the share of Danish hauliers to be examined on the relations with Germany, France and the Netherlands, which account for about 80% of Danish intra-Community flows.

Although there was an improvement in the German market as far as Danish inward traffic was concerned (+7%), this was offset by a fall in the larger Danish outward traffic (-3%) so that the total German market was virtually unchanged. The Danish share of this market fell by 5% in each direction.

The much smaller French market improved by about 10% and the Danish hauliers increased their share by about 5%. On the Dutch market, Danish hauliers share was slightly reduced.

The Business Opinion Survey, however, shows that Danish hauliers continued to be among the most optimistic in the Community; the results from other sources discussed above suggest that the optimism may have been misplaced.

Greek hauliers

According to Greek sources, intra-Community traffic involving Greece fell by 16% in 1982, the fall of traffic outwards from Greece being more severe (-22%) taking traffic levels almost exactly back to the 1980 levels. In the case of inward traffic to Greece the fall was smaller (-9%); this compared with a growth of 30% the previous year. The 1982 flows both inward and outward were close to 0.5 mio tonnes.

The German market (which accounts for over 50% of Greek intra-Community traffic) fell by 11% according to Greek sources but rose by 9% according to German sources (a 20% difference).

Of the other main markets that of the Netherlands was, according to Greek sources, the only one to grow (+6%), while those with France and Italy fell by 29% and 19% respectively; the smaller markets with UK and Denmark were particularly weak with falls of over 50%.

Information from Greek sources is not to hand on the share of Greek hauliers, but from German sources the share of non-German hauliers rose on the Greek-German relation. However given the differences between the German and Greek sources on total flows, there is some uncertainty here.

The results of the Business Opinion Survey shows that the Greek hauliers were very pessimistic which is consistent with statistics from Greek sources.

2.2. Structural analysis of the road haulage market between different Member States

The previous section examined hauliers' activity levels in 1982 as compared to the previous year, but this does not answer the question as to the shares held by different Member States in the intra-Community market. Unfortunately, the data currently available for 1982 are taken from many different sources and do not permit a detailed structural analysis to be carried out. The most extensive comparable data currently available relate to that collected for the Road Statistical Directive for 1980, but as the structural data that will be examined only change slowly from year to year this is not a serious disadvantage.

2.2.1. Overall shares of market held by hauliers from different Member States

1980 data are available for Germany, France, the Netherlands, Belgium, Luxembourg, the United Kingdom, Ireland and Denmark, but not Italy or Greece (which was not a member of the EEC at that time). Note that bilateral traffic is covered by the Directive but that "multilateral" traffic (traffic by haulier from Member State A between Member State B and Member State C) is not.

The market shares, both in terms of tonnes and t-km, are shown in Table 2.1. The figures only relate to flows between the eight Member States concerned; there will be referred to as EUR-8 for convenience.

Table 2.1.: Shares of the market held by hauliers from EUR-8 on intra EUR-8 journeys.

Country of haulier	% Share of market	
	in tonnes	in t-km
D	22	21
F	17	23
NL	33	28
B	19	15
L	2	1
UK	3	5
IRL	1	1
DK	3	6
Total EUR-8	100	100

The dominance of NL hauliers (especially in tonnes) is clearly seen from Table 2.1. The share of F, UK and DK hauliers increases considerably if measured in t-km as opposed to tonnes, indicating that average trip length must be above average.

2.2.2. Shares of market on a relation basis (in tonnes)

The figures in Table 2.1. are evidently related to the size and geographical position within the Community of the Member State concerned. A more interesting table is Table 2.2. which gives the share of traffic (in tonnes) inwards and outwards from each Member State which are carried by hauliers from the Member State concerned.

Table 2.2. Percentage share of inward and outward traffic (in tonnes) held by hauliers from the Member State concerned.

Journeys to and from	Inward traffic	Outward traffic	Inward+Outward traffic
D	38	41	39
F	45	44	44
NL	66	75	70
B	39	49	44
L	49	31	38
UK	45	61	52
IRL	72	92	84
DK	63	81	74
Total EUR-8	47	53	50 (by definition)

The results clearly show the dominance of NL hauliers (on flows to and from NL) who carry 70% of the traffic and the dominance of the peripheral Member States (IRL and DK) with 84% and 74% respectively, UK hauliers also handle just over 50% of traffic with UK. Since, for the Community as a whole, 50% of traffic must be carried by "own hauliers", the remaining Member States D, F, B and L must necessarily carry less than 50%, the actual percentages vary from 38 to 44.

As one might expect, "own hauliers" tend to dominate outward traffic, but this dominance, 53% on average, is not as large as might have been expected. "Own hauliers" share in outwards traffic is much higher than inward traffic for the peripheral Member States (UK, IRL and DK) and considerably higher for NL and B; in the case of D and F there is little difference while L hauliers have a very poor share of their outward traffic.

The dominance of hauliers from particular countries can be further examined on a relation basis. Table 2.3. shows the percentages of the tonnage carried by hauliers from the origin country.

Table 2.3.: Percentage share of traffic (in tonnes) held by hauliers from "Origin" Member States.

TO FROM	D	F	NL	B	L	UK	IR	DK	TOTAL EUR-8
D	-	51	31	54	56	23	25	34	41
F	42	-	35	47	40	52	0	35	44
NL	76	67	-	78	64	35	27	62	75
B	57	57	36	-	50	18	18	23	49
L	23	17	56	60	-	0	-	-	31
UK	85	56	79	91	100	-	29	5	61
IR	90	100	100	100	-	92	-	0	92
DK	83	81	41	75	-	99	100	0	81
EUR-8	62	62	34	61	51	55	28	37	53

Since Table 2.3. only relates to "bilateral" traffic, the sum of the shares of traffic held by hauliers from the "origin" and "destination" country is necessarily 100%; hence the shares of traffic by hauliers from "the destination" country can be obtained by subtracting the share held by the "origin" country in Table 2.3. from 100%. Example D hauliers have 58% of the traffic from F to D and 38% of the EUR-8 traffic to D.

The following remarks can be made with regard to the cells of Table 2.3., the EUR-8 row and column totals have already been examined in Table 2.2. The dominance of NL hauliers on all relations (to and from NL) with important tonnages can clearly be seen. The shares of D, F and B hauliers on the relations between them are fairly close to 50% and it is the poor share that these hauliers have on the NL market which reduce their overall shares. Figures for L should be treated with some reserve, especially on the relation with F, because of sampling errors. The shares of UK, IRL and DK hauliers with the other Member States are all consistently high except for the UK with F and DK with NL. The figures for the flows between UK, IRL and DK are particularly sensitive to the problem of unaccompanied semi-trailers and should be treated with some reserve.

2.2.3. Shares of market on a relation basis (in tonne-kilometres)

The analysis carried out in the previous section can also be repeated in tonne-kilometres (t-km). Table 2.4. corresponds to Table 2.2. of the previous section.

Table 2.4. : Percentage share of inward and outward traffic (in tonnes) held by hauliers from Member State concerned.

Journeys to and from	Inward traffic	Outward traffic	Inward+Outward traffic
D	32	39	35
F	46	52	49
NL	66	75	71
B	38	50	45
L	42	42	42
UK	50	68	57
IRL	62	88	76
DK	67	84	76
Total EUR-8	45	55	50 (by definition)

The principal differences between the results of Tables 2.2. and 2.4. are as follows :

F, L and UK hauliers have a larger share of traffic from their respective countries when traffic is measured in t-km as opposed to tonnes; D and IRL hauliers have smaller shares when measured in t-km; NL, B and DK hauliers have similar shares on either criteria.

The differences in shares measured by tonnes and t-km are generally similar for both inward and outward traffic except in the case of F where there is a 8% greater share for t-km for outward traffic but only a 1% large share for inward traffic.

2.2.4. Shares of the road haulage market held by own account operators

The results from the Road Statistical Directive for 1980 also give a breakdown between "hire and reward" and "own-account" operators. Table 2.5. gives the share, in tonnes and t-km for own account hauliers. Once again the absence of data from Italy (and Greece) confines the analysis to journeys between the other eight Member States.

Table 2.5. : Share of market held by own-account operators from EUR-8 on intra-EUR-8 journeys

Country of haulier	% Share of market	
	in tonnes	in t-km
D	22	17
F	34	24
NL	19	14
B	36	35
L	21	14
UK	12	11
IRL	38	14
DK	12	15
Average	25	20

Table 2.5. shows that those Member States who have had, historically, a particularly restrictive attitude towards road haulage, at least domestically, have a much larger proportion of their international road haulage in the hands of own account operators. Thus, for tonnes, F, B and IRL have about 35% own-account, D, NL and L about 20% own-account and UK and DK 12% own-account.

If we consider t-km, we notice that only two Member States (France and Belgium) have rather high percentage of own-account (24% and 35% respectively). All other Member States show a much lower share of own-account when assessed in t-km varying from 11% (United Kingdom) and 17% (Germany). It can be seen that the Irish hauliers have only 14% of t-km done by own-account hauliers as compared with 38% of tonnes. This is due to the fact that the own-account market is almost entirely with the UK (which is relatively short distance) while the hire and reward market encompasses both UK and (longer distance) continental markets.

2.3. BUSINESS SURVEYS

2.3.1. Introduction

The main aim of the business surveys conducted among international road hauliers is to gain a quick impression of what they think about their firms' current level of activity. They also provide information on finance, investment and recruitment.

The questionnaires do not elicit information about the type of goods carried so as not to cause any additional demand for information which would jeopardize the efficiency of the survey procedure.

Since economic information is of special value in understanding how a firm is operating, this section will concentrate on economic trends.

For the first time this report includes the findings of the surveys conducted among Greek road hauliers and thus covers the whole of the ten-nation Community. Some of the final quarter figures for Germany are provisional.

2.3.2. Transport activity

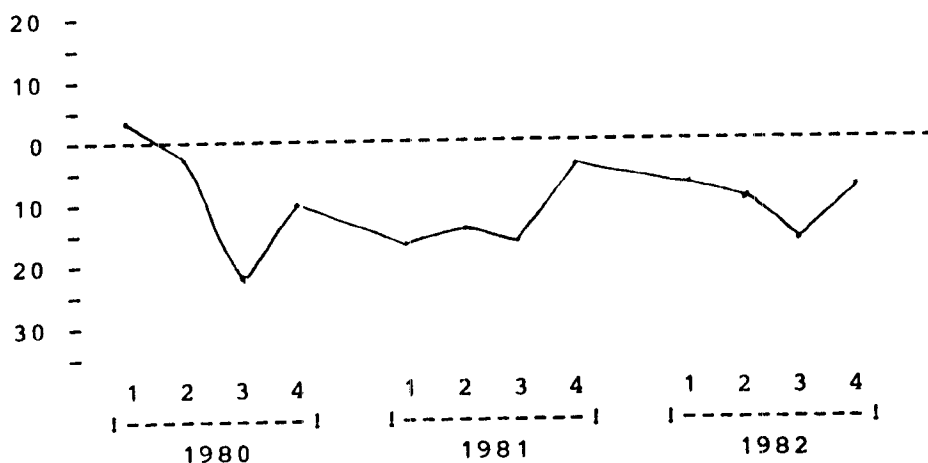
The road hauliers covered by the survey see the situation on the intra-Community road haulage market as follows: despite a favourable trend at the end of 1981, there was a decline in the first three quarters of 1982 and a slight recovery in the final quarter (see figure 2.1.).

Although the situation is far from satisfactory, more detailed examination of hauliers' opinions shows major differences from country to country. The level of activity is improving in countries such as Belgium, Denmark, the Netherlands, the United Kingdom and Ireland while it is declining in France, Italy, Germany and Greece. The improvement in the final quarter is general in all countries except France.

As regards the trend of activities according to the type of firm covered (small, medium or large), activity has picked up in large firms, stagnated in small firms and declined in medium sized firms.

In most countries large firms are far more sensitive to seasonal variations than small or medium-sized companies.

Figure 2.1. Activity Indicators : Global balance of opinion
(in percentage)



Despite the decline in the third quarter, vehicles were generally utilised more than in 1981. In 1982, some 35.5% of firms considered the utilization of their vehicles to be good or very good, compared with 34% in 1981. The proportion of firms which felt that the utilization of their vehicles was bad fell from 23.3% in 1981 to 21.5% in 1982. The overall balance of replies rose from +11% to +14% for 1982.

Broken down by type of firm, utilization was good or very good for 41.5% of large firms (37% in 1981), 35.5% of medium-sized firms (33.7% in 1981) and 35% of small firms (35% in 1981).

To conclude this examination of the findings concerning international transport activity, it should be mentioned that the forecasts for the first quarter of 1983 are a little pessimistic (a drop of six points compared with the final quarter of 1982) but this is more a seasonal drop and not a general trend.

2.3.3. Analysis of economic indicators

As well as being interrelated the economic indicators (recruitment of drivers, cash and investment difficulties) are also related to actual and proposed activity through a number of interdependent links.

Detailed analysis of these indicators can therefore provide very useful information concerning not only the economic viability of the firms but also the future utilization of production capacities and the general situation of transport activity.

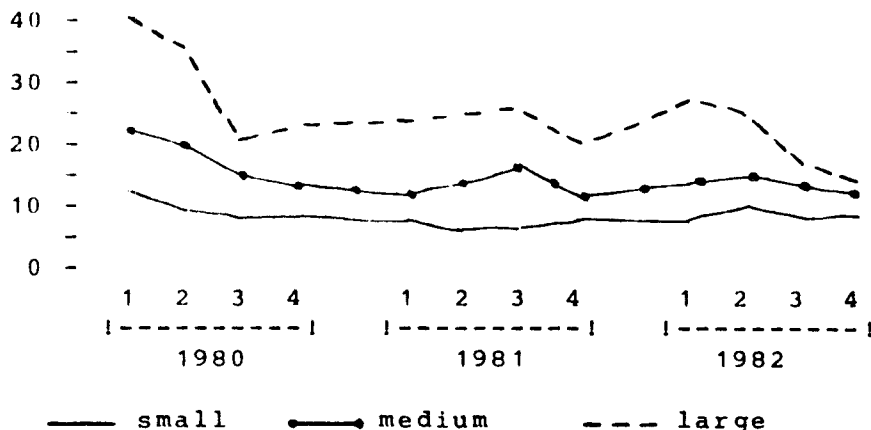
2.3.4. Recruitment

The decline in recruitment which started in early 1980 continued in 1982. The average proportion of firms stating that they had recruited drivers remained approximately the same as in 1981, which was well down on the 1980 figure (1980: 16%, 1981: 12%, 1982: 12.7%).

Recruiting figures also differ fairly considerably depending on the size of firms. Only 8% of small firms recruited drivers (6% in 1981), compared with 14.5% of medium-sized firms (13% in 1981) and 24.5% of large firms (24% in 1981).

This is partly due to the fact that large firms invest more but the main reason is that fluctuation of staff is greater in these firms.

Figure 2.2. Percentage of firms indicating having recruited drivers



More detailed examination leads to the following comments :

- (a) Despite a slight improvement, the average figure for firms recruiting staff remains very low (12.7%)
- (b) Contrary to the two previous years, the annual average figure for firms stating that they had recruited staff dropped in the case of large firms only (from 24% in 1981 22.5% in 1982) and increased in the case of small firms (from 6% to 8%) and medium-sized firms.

- (c) The differences in the annual recruitment rates according to size of firm do not completely coincide with the differences in the quarterly rates and for the first time these differences have narrowed (see figure 2.2.).

Examination of the quarterly figures and comparison with the findings for transport activity lead to the following comments:

- (a) Examination of the quarterly figures shows that recruitment picked up in the first two quarters and dropped in the third and final quarters.
- (b) This drop is particularly noticeable for large firms where the quarterly recruitment rate dropped from 29% in the first quarter to only 16% in the final quarter.
- (c) Comparison between the recruitment rate and level of activity reveals no short-term causal link between these two indicators. This is perhaps due to the fairly pessimistic forecast for the first quarter of 1983.

Analysis of the situation in the various countries shows that the differences remain. Firms in Germany and France have conducted little recruitment while firms in the United Kingdom, Italy, Belgium, Luxembourg and Greece have fairly high recruitment rates.

There are considerable size-related differences: in Belgium, Luxembourg, the Netherlands and Denmark it is mainly the large firms which recruit while in Italy and Greece it is the medium-sized firms and in the United Kingdom the small firms.

In view of the situation on the labour market, it is not surprising that a very high proportion of firms (65% in 1980, 77% in 1981 and 80% in 1982) consider that recruitment of drivers is easy or normal. However, recruitment is becoming increasingly difficult in two countries - Greece and Belgium.

The proportion of firms stating that they have recruited drivers is still very low. There is therefore some justification for thinking that they are replacements and not extra staff.

This low recruitment rate is due to a number of factors, principally the economic crisis and the size of welfare contributions.

2.3.5. Cash situation

Despite a slight improvement at the end of the year, the cash situation of road hauliers is far from satisfactory. The average annual percentage of firms stating that they have had cash difficulties was 41% in 1980, 51% in 1981 and 49% in 1982.

The improvement applies to all categories especially large and medium-sized firms (see figure 2.3.). The proportion of medium-sized firms stating that they had experienced difficulties rose from 45% in 1980 to 55% in 1981 and dropped to 51% in 1982.

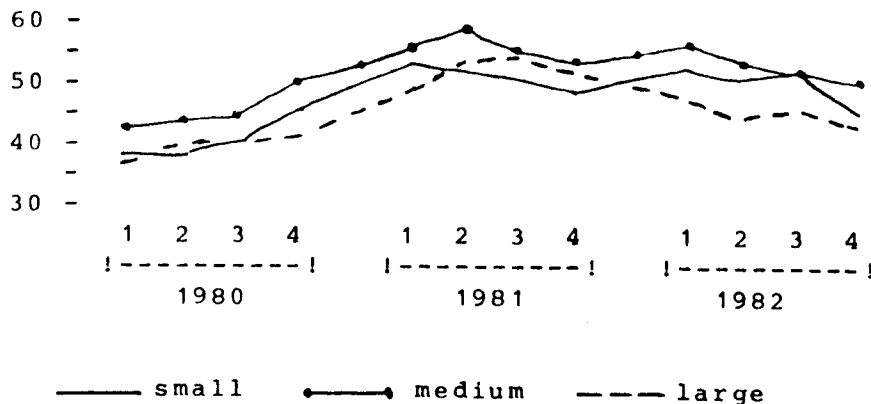
The situation of large firms which had felt their difficulties increase during the previous year appears to be improving. The average annual percentage was 39% in 1980, 51% in 1981 and 44.5% in 1982.

The drop in the case of small firms is only by one point (49.5% in 1981 and 48.5% in 1982) but there was improvement in the final quarter of 1982 (a nine-point drop compared with the third quarter).

Cash difficulties vary considerably according to country. Some countries had a fairly low average annual percentage of firms in difficulty (all sizes taken into consideration): the Netherlands: 13%, Denmark: 26%, Belgium: 29%, the Federal Republic of Germany: 39%. Other countries, however, had a high or very high average annual rate: Luxembourg: 44%, United Kingdom: 52%, Ireland: 56%, France: 66%, Greece: 69.5% and Italy: 72%.

Compared with the trend for 1981, the average rate of firms with cash problems increased in Luxembourg, Greece, France, and Italy and dropped in the other countries.

Figure 2.3.: Firms indicating that they have had cash difficulties



These specific national features may be due to the range of fiscal policies in force in each of the Member States as well as to the varying rates of inflation.

The road hauliers themselves consider that the reason for the worsening cash problem at Community level is attributable to the increase in costs and the failure to adjust prices to this increase.

2.3.6. Investment

Analysis of the results relating to investment in general and to investment in vehicles in particular provides the main indicator of road haulage activity. There is an inter-relationship between investment and business activity and between recruitment and the future utilization of transport capacity.

Investment was somewhat higher than in the previous year. The results of the surveys conducted in 1982 give an annual average percentage of 35% for firms which made investments compared with 32% in 1981 (but 38% in 1980).

Examination of investment as a function of company size shows that it is still the large firms which register a high percentage (58% in 1980, 51% in 1981 and 55% in 1982). They are followed by medium-sized firms (43% in 1980, 35% in 1981 and 40.25% in 1982) and by small firms (27% in 1980, 22% in 1981 and 23% in 1982).

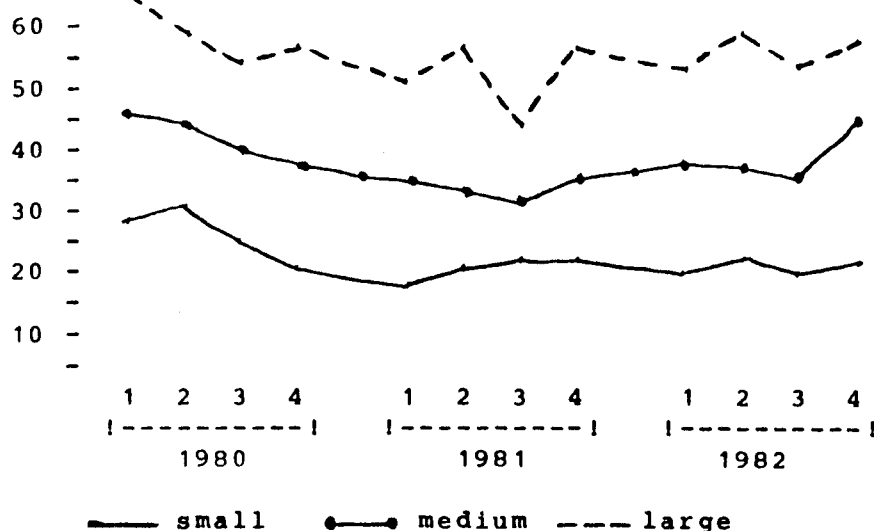
As we can see from figure 2.2. large and medium-sized firms are tending to converge. The percentage of firms which made investments is increasing in every category, especially medium-sized and large firms. In 1982 there was an increase of five points for medium-sized firms, four points for large firms and only 1 point for small firms.

Comparison of these findings with the other indicators shows that there is some connection with the cash situation, activity and utilization of capacity but not with recruitment.

The breakdown by type of investment is almost identical to that for 1981. Investments other than those in vehicles accounted for approximately 13% of total investment in 1982 (as in 1981 and 1980).

Of the investment in vehicles, the proportion spent on purchasing new vehicles (expansion investment) remains very low and is tending to drop a little. This drop has been gradual: from 30% in 1980 to 24% in 1981 and 23.9% in 1982 (20% in the final quarter of 1982).

Figure 2.4.: Percentage trend in the number of firms having invested



The size-related situation in 1982 is as follows:

- Small firms: 24.4% of investment on average goes towards the procurement of new vehicles (1981: 26%). The general trend is towards a slight drop except in the final quarter for which 26.5% of investment in vehicles is accounted for by the purchase of additional vehicles.
- Medium-sized firms: an average of 23% of investment went towards the procurement of new vehicles (1981: 20%). The general trend is towards a slight increase except in the final quarter (final quarter of 1982: 20%).
- Large firms: the average proportion spent on increasing the vehicle fleet is 25% (1982: 28%). The general trend for the four quarters is towards a slight drop.

As regards the situation by country, investment rates have increased everywhere except in Ireland, Italy and Greece. The proportion of firms investing is very low in Ireland and Italy, very high in the United Kingdom and in the Netherlands and the average in the other countries of the EEC.

To sum up, the trend towards increased investment which dates from the second quarter of 1981 seems to have been maintained, suggesting that, the business climate of the road haulage sector will become more favourable, as time goes on.

2.4. Prices

The analysis presented in the 1981 Annual Report has been used as a model for the subsequent Quarterly Reports (Nos 5 onwards) and there appears to be little merit in repeating what has already been published.

A deeper analysis of the road price data is in the course of development and it is planned to incorporate this as an ad-hoc section in a forthcoming Quarterly Report.

2.5. Costs

For 1982, the cost indices are harmonised. Detailed data are gathered now from 7 Member States Greece, Ireland and Italy not yet being included. Fuel cost has been examined separately in the quarterly report. Only some key cost categories are examined in 1982 annual report, such as wage, repairs, depreciation, taxes and interest.

The figures below (table 2.6.) give the cost evaluation only in 1982 while the graphics figures (2.5.-2.10.) give an evaluation of the same cost categories for a longer period.

Table 2.6.

	Wages		Repairs	Depreciation	Taxes	Interest
	NC	ECU	NC	NC	NC	NC
D	4.3	11.0	3.1	6.0	0.3	-3.7
NL	5.5	11.8	5.4	4.6	0.0	-25.4
B/L	7.9	-0.3	6.1	21.0	0.0	-11.7
F	15.3	10.0	14.2	9.3	3.6	5.4
UK	6.6	-1.3	7.4	5.9	21.7	-2.0
DK	10.3	9.0	12.7	10.3	3.9	3.3

Wages represent 4% of total cost. In national currency, we note an increase varying between 4.3% and 10.3% for Germany, the Netherlands, United Kingdom, Belgium and Denmark while in France the increase is much higher arriving at 15.3%. In terms of ECU, an increase of approximately 10% is noted for Germany, the Netherlands, Denmark and France. On the contrary, a decrease of 0.3% (Belgium) and 1.3% (United Kingdom) is noted due to the increases of exchange rates.

Repairs represents 7% of total cost. In national currency an increase varying between 3.1% and 14.2% is noted for all five Member States, the highest being in France and the lowest in Germany.

Depreciation represents 7% of total cost. In national currency we also note an increase in all Member States varying between 4.6% (the Netherlands) and 21% (Belgium).

Taxes represent only 1% total cost. In national currency, we note very small increases (less than 0.5%) in Germany, the Netherlands and Belgium; an increase of 3.6% in France and 3.9% in Denmark. In the United Kingdom, a high increase of 21.7% is noted.

Interest represents 4% of total cost. In terms of national currency a decrease varying between 20% (United Kingdom) and 25.4% (the Netherlands) is noted while we note an increase of 5.4% in France and 3.3% in Denmark.

FIGURE 2.5.

INTEREST IN NATIONAL CURRENCY

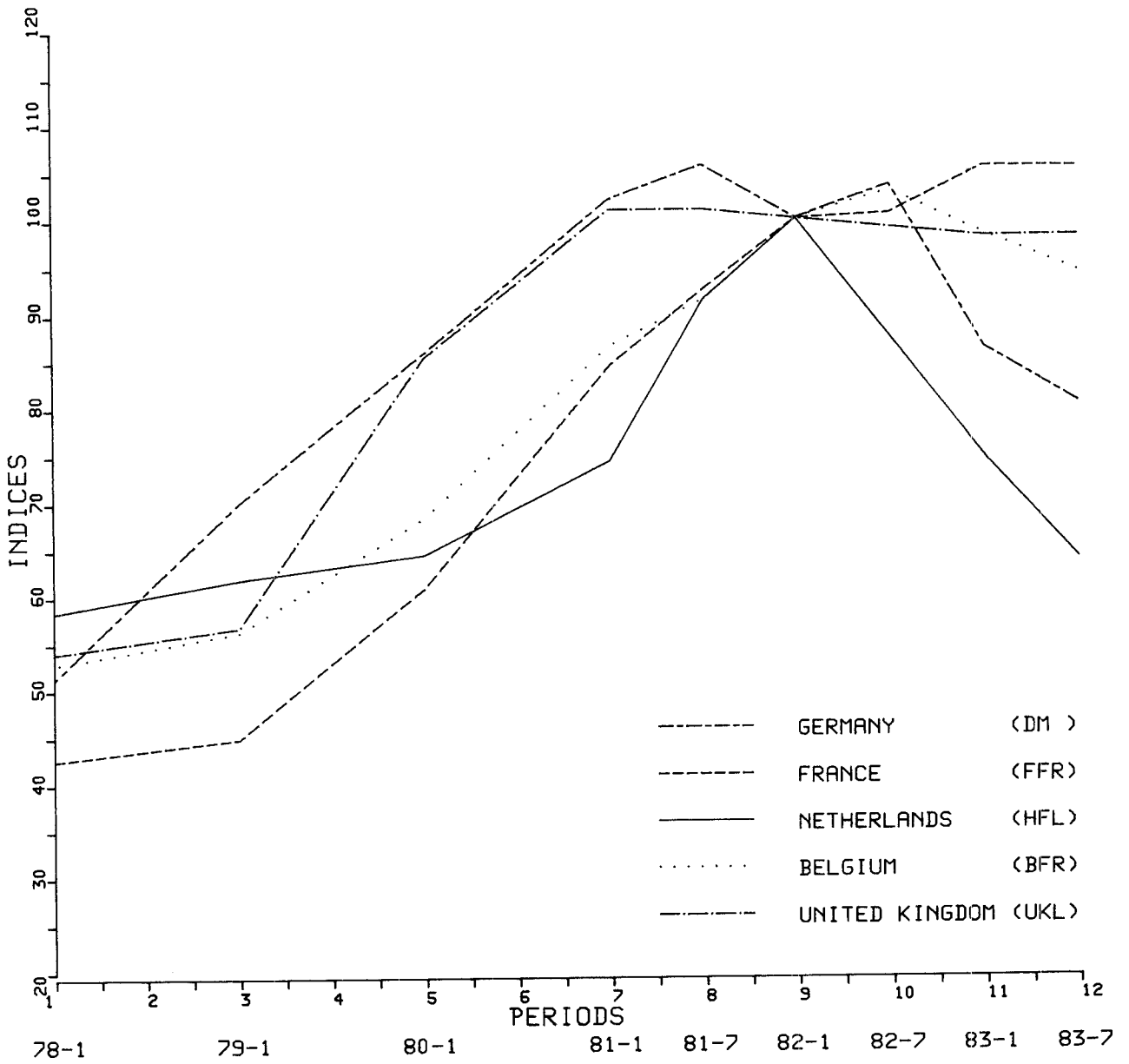


FIGURE 2.6.

WAGES IN NATIONAL CURRENCY

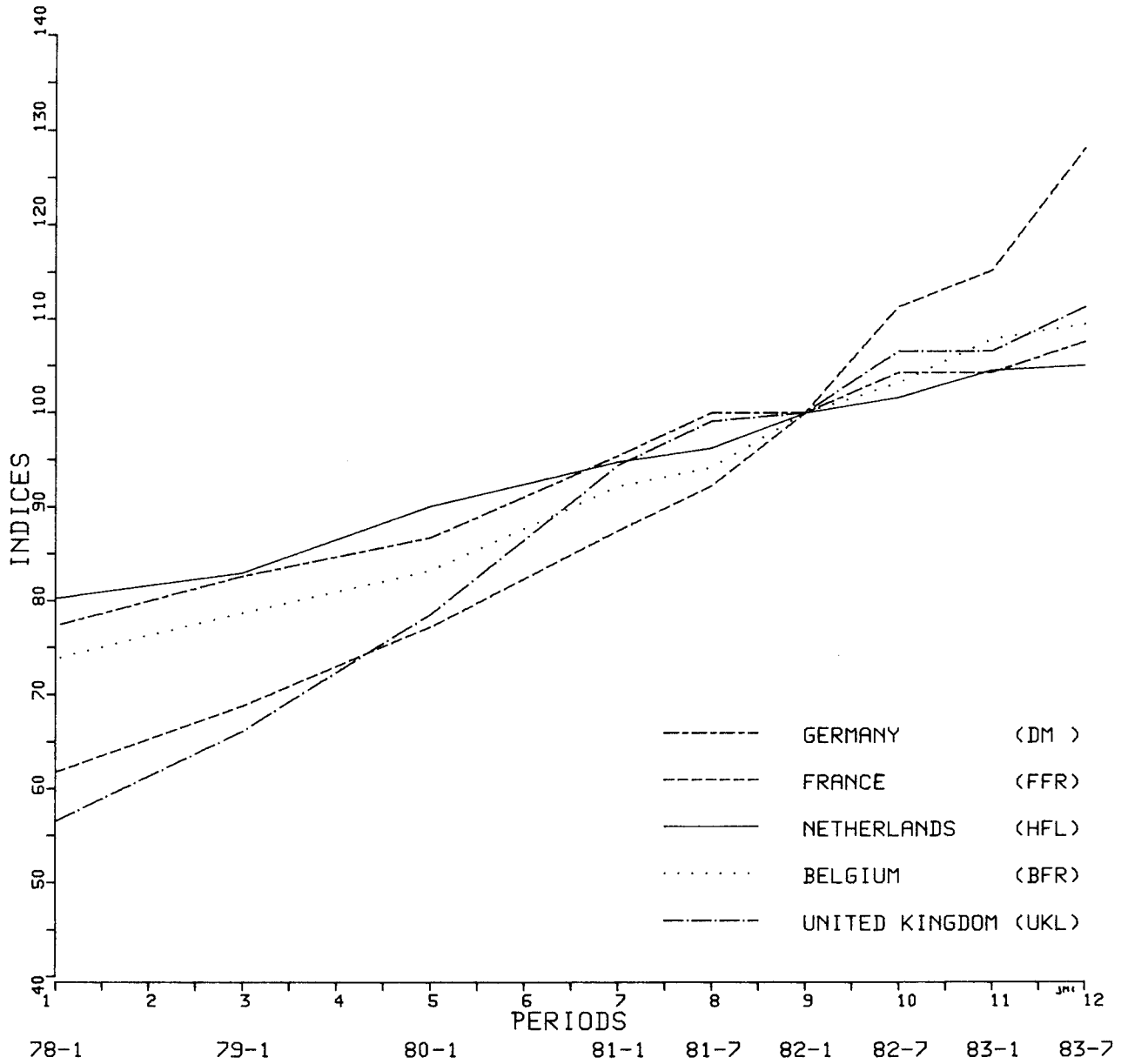


FIGURE 2.7.

TAXES AND CONTRIBUTIONS IN NATIONAL CURRENCY

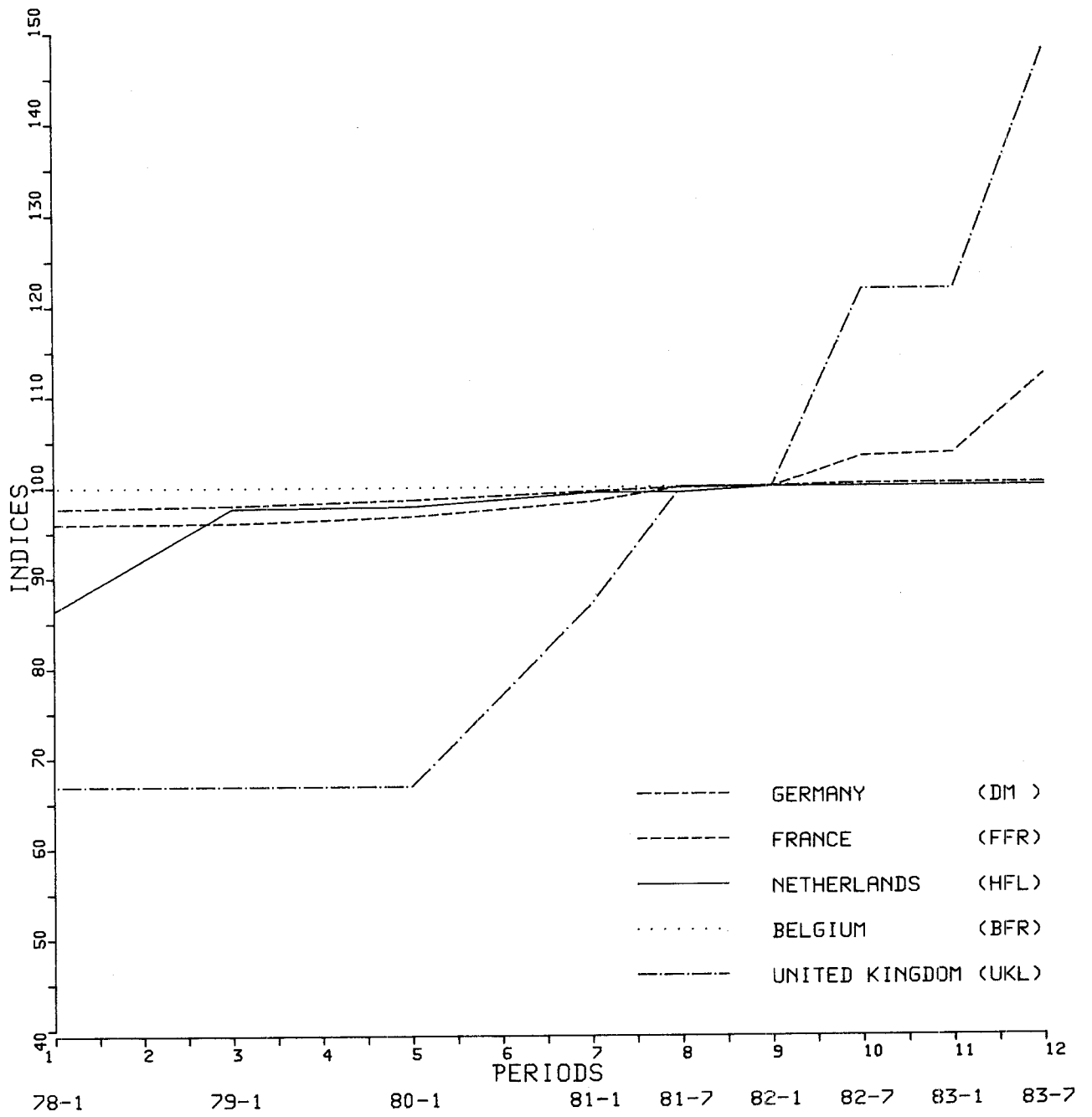


FIGURE 2.8.

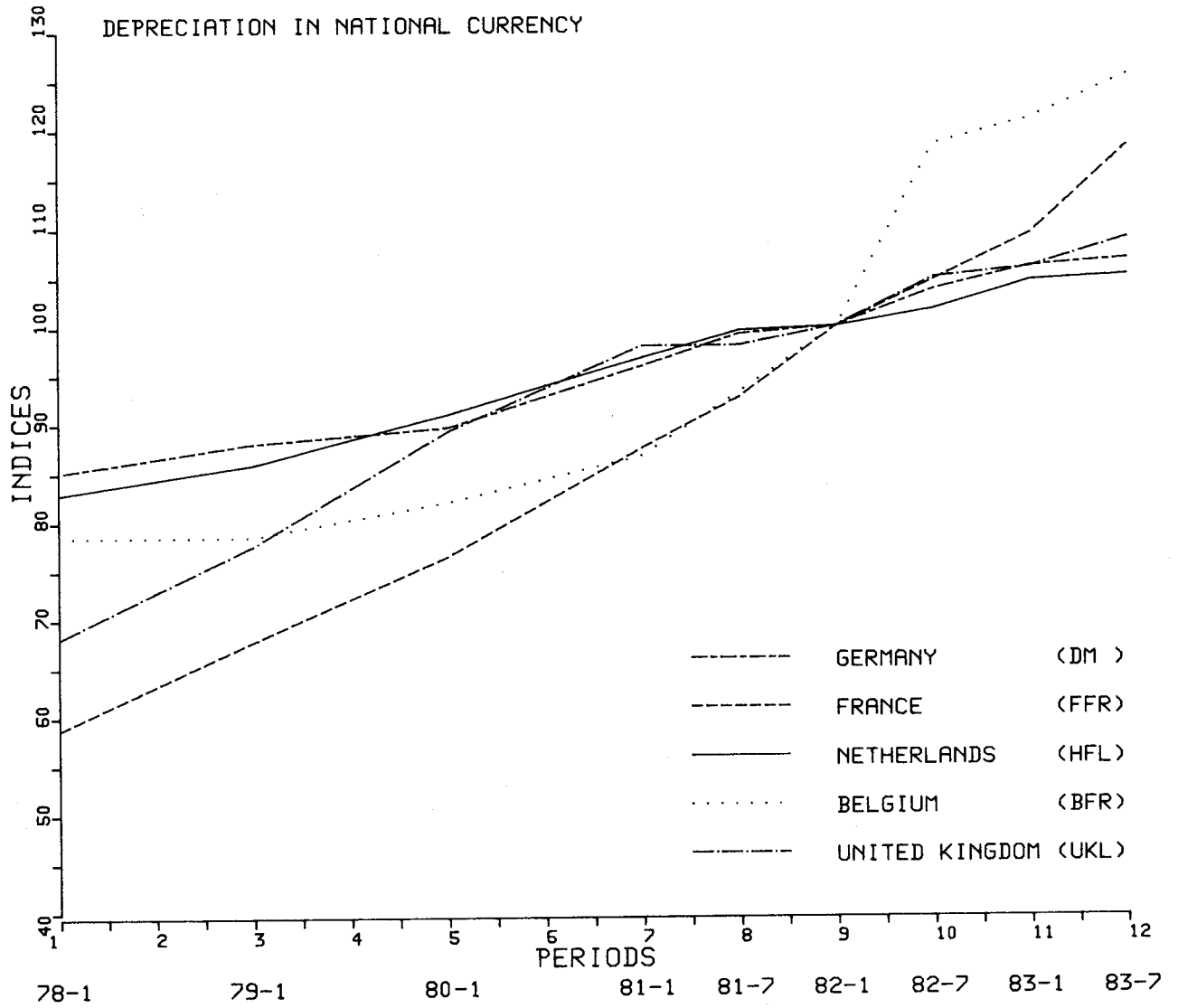


FIGURE 2.9.

REPAIRS AND RENEWALS IN NATIONAL CURRENCY

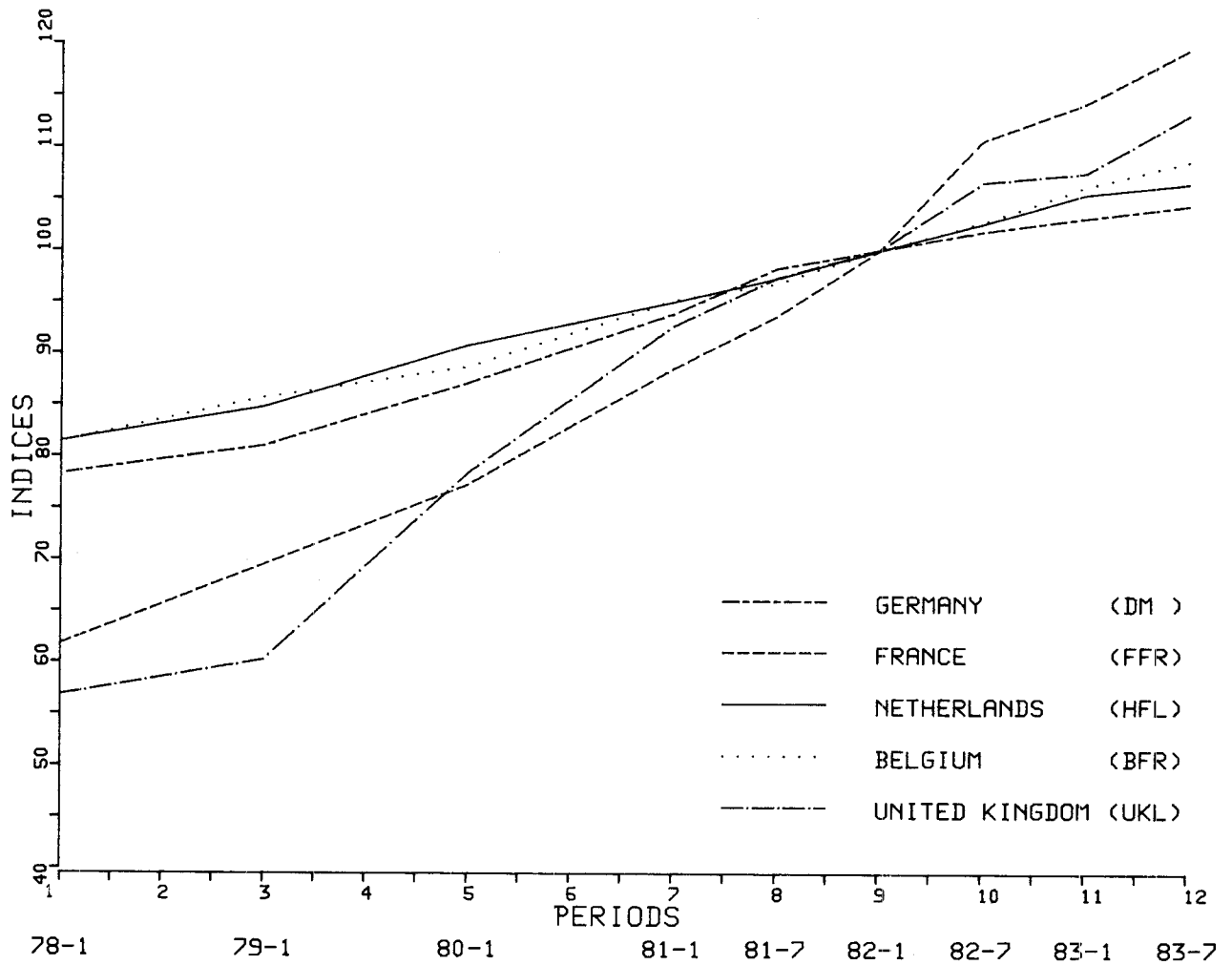
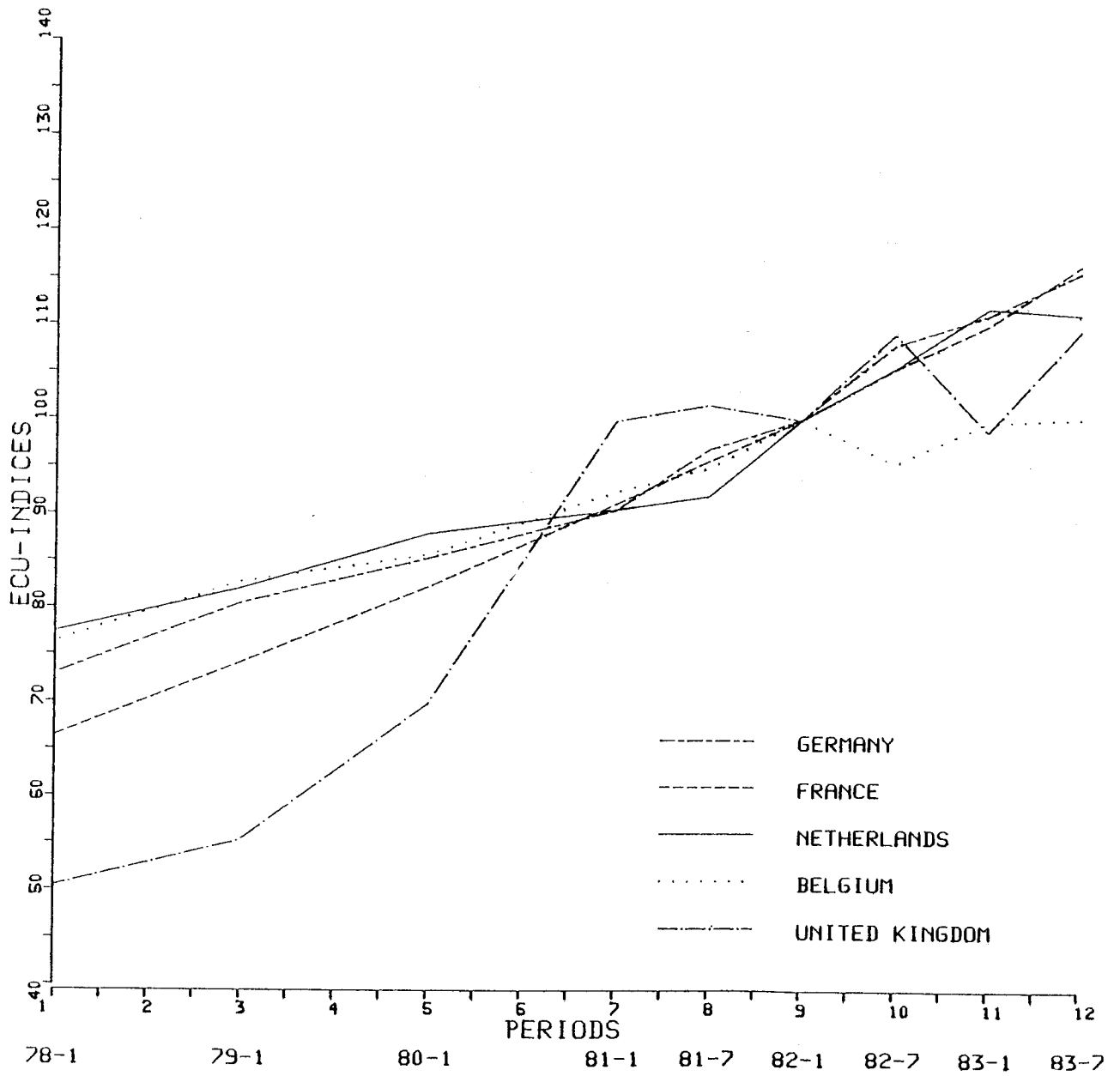


FIGURE 2.10.
WAGES IN ECU



CHAPTER 3

INLAND WATERWAYS

3.1. Introduction

3.1.1. The data

In the Annual Report 1981 a comparison was made between 1981 and 1980 on international transport activity by inland waterways. In this issue we will compare the results of 1982 with those of 1981 and those of 1979. The year 1979 was chosen because, in the discussion on the present overcapacity in the inland waterway sector, 1979 was found to be the last year in which supply and demand for inland waterway services were more or less balanced.

Data reproduced in the issue are statistical data obtained from the national statistical offices of Belgium, the Federal Republic of Germany and The Netherlands. For France, figures were provided by the Office Nationale de la Navigation. Figures on Rhine traffic and Rhine fleet were obtained from the Central Rhine Commission (CCR).

The data published on bilateral traffic are based on information provided by the exporting country. A comparison with these data in the 1981 issue of the Annual Report is not always possible since a number of sources were not in a position to provide the necessary data last year.

3.1.2. Overall developments

Following the continuing crisis in the steel industry and the building and construction sector, as well as the stagnation and structural changes in energy production and consumption, inland waterway transport suffered a considerable loss of tonnes transported in 1982 in comparison with 1981. National and international inland waterway transport taken together lost more than 15 million tonnes of traffic or 3.7%. Since 1979 the loss in tonnes carried amounts to more than 47 million tonnes or 10.8%.

Developments in tonnekilometres show a less dramatic decrease in transport activity. National and international transports taken together decreased by 2.4% or 2.364 mio.tkm in 1982 compared with 1981 and by 6.2% or 6.317 mio.tkm in 1982 compared with 1979. The developments by country in mio.tkm are shown in the following tables.

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

	B/L	D	F	NL	Total
1979	5,908	50,987	11,898	33,472	102,265
1980	5,853	51,435	12,151	33,478	102,917
1981	5,442	50,010	11,068	31,792	98,312
1982	4,958	49,401	10,226	31,363	95,948
1982-1979 growth	-950 -16.1%	-1,586 -3.1%	-1,672 -14.1%	-2,109 -6.3%	-6,317 -6.2%
1982-1981 growth rate	-484 -8.9%	-609 -1.2%	-842 -7.6%	-429 -1.3%	-2,364 -2.4%

By market, national transport and international transport, which again could be split up in international intra community Rhine traffic and international North/South traffic, the situation is as follows:

Table 3.2.: National and international transport by market ('000,000 tonnes)

	National	International	
		Rhine	North/South
part of total i.w. transport	55%	33%	12%
1982-1981 tonnes lost growth rate	-10.3 -4.6%	-1.7 -1.3%	-3.2 -6.1%
1982-1979 tonnes lost growth	-30.3 -12.5%	-14.1 -9.9%	-3.1% -6%

In general, international inland waterway traffic showed a better resistance to the economic crisis than national transports.

However, 1982 proved to be a year which was, relatively speaking, worse for North/South traffic than for the national transports of Belgium, Luxembourg, Germany, France and the Netherlands taken together.

On international transport markets, the Rhine lost considerably more of its tonnes carried during the period 1979-1982 than the North/South area.

However, 1982 proved to be worse for North/South than for Rhine.

- 3.1.3. A further analysis of the national and international developments in inland waterways in 1982 compared with 1981 and 1979 on a country-by-country basis, by important commodities and by market, Rhine and North/South, is given below.

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

- 3.2.1. Table 3.3. presents tonnage figures for 1979, 1981 and 1982 on each of the bilateral traffic relations and the growth rates for 1982 against 1981 and against 1979. These data are also given for national traffic.

Table 3.3. Inland Waterways: tonnes carried, national and international traffic ('000 tonnes)

TO		B/L	D	F	NL	Total Exports
FROM						
B/L	1979	21,080	9,523	5,819	13,813	29,155
	1981	18,655	9,357	5,632	13,870	28,859
	1982	21,908	10,694	4,262	10,923	25,879
	1982-1979	+828	+1,171	-1,557	-2,890	-3,276
	growth	+3.9%	+12.3%	-26.8%	-20.9%	-11.2%
	1982-1981	+3,243	+1,337	-1,370	-2,947	-2,980
growth rate	+17.4%	+14.3%	-24.3%	-21.2%	-10.3%	
D	1979	10,509	83,705	3,366	32,291	46,166
	1981	9,686	76,418	2,451	30,541	42,688
	1982	9,266	71,693	2,394	27,975	39,635
	1982-1979	-1,243	-12,012	-972	-4,316	-6,531
	growth	-11.8%	-14.4%	-28.9%	-13.4%	-14.1%
	1982-1981	-430	-4,725	-57	-2,566	-3,053
growth rate	-4.4%	-6.2%	-2.3%	-8.4	-7.2%	
F	1979	4,246	12,753	50,973	3,845	20,844
	1981	3,708	11,889	46,020	3,325	18,922
	1982	3,211	10,951	40,600	3,803	17,965
	1982-1979	-1,035	-1,802	-10,373	-42	-2,879
	growth	-24.4%	-14.1%	-20.3%	-1.1%	-13.8%
	1982-1981	-497	-938	-5,420	+478	-957
growth rate	-13.4%	-7.9%	-11.8%	-14.4%	-5.1%	
NL	1979	26,201	69,023	4,534	87,118	99,758
	1981	26,791	62,418	3,869	81,792	93,078
	1982	27,270	63,858	4,028	78,375	95,156
	1982-1979	+1,069	-5,165	-506	-8,743	-4,602
	growth	+4.1%	-7.5%	-11.2%	-10.0%	-4.6%
	1982-1981	+479	+1,440	+159	-3,417	+2,078
growth rate	+1.8%	+2.3%	+4.1%	-4.2%	+2.2%	
Total imports	1979	40,956	91,299	13,719	49,949	438,799
	1981	40,195	83,664	11,952	47,736	406,442
	1982	39,747	85,503	10,684	42,701	391,211
	1982-1979	-1,209	-5,796	-3,035	-7,248	-47,588
	growth	-3.0%	-6.3%	-22.1%	-14.5%	-10.8%
	1982-1981	-448	+1,839	-1,268	-5,035	-15,231
growth rate	-1.1%	+2.2%	-10.6%	-10.5%	-3.7%	
						Total nat.& intern.

3.2.2. As is shown in table 3.3, of 12 international relations 7 encountered losses in tonnages. The following bilateral relations were down more than 1 million tonnes in 1982 over 1981.

B/L	----	F	1.370 mio t
B/L	----	NL	2.947 mio t
D	----	NL	2.566 mio t

Of the five cases in which a rise in tonnes transported could be noted the following relations gained more than 1 mio t

B/L	----	D	1.337 mio t
NL	----	D	1.440 mio t

3.2.3. In looking at the figures for 1982 and 1981 from the point of view of the effect on each of the bilateral relations, i.e. in terms of percentage lost or gained, the following relations lost more than 5% of their traffic.

B/L	----	F	-24.3%
F	----	B/L	-13.4%
D	----	NL	-8.4%
F	----	D	-7.9%

On the other hand, the following relations gained more than 5% in traffic.

F	----	NL	+14.4%
B/L	----	D	+14.3%

3.2.4. Repeating this analysis, comparing 1982 and 1979, the picture is much more gloomy. Only two bilateral relations show a positive development, B/L -- D (+12.3%) and NL -- B/L (+4.1%). All the other relations encountered losses.

For three relations the loss amounted to more than 2 mio t :

NL	----	D	5.165 mio t
D	----	NL	4.316 mio t
B/L	----	NL	2.890 mio t

3.2.5. The following relations lost more than 20% of their market :

D	----	F	-28.9%
B/L	----	F	-26.8%
F	----	B/L	-24.4%
B/L	----	NL	-20.9%

3.2.6. An analysis from the point of view of the transport development by country in 1982 compared to 1981 results in the following table.

Table 3.4. : National, import and export traffic by country, 1982 over 1981. ('000 tonnes)

Country	tonnes lost or gained	as part of total traffic on that relation
B/L --- D, F, NL	-2,980)	-10.3%)
	(-3,428	(-5.0%
B/L --- D, F, NL	-448)	-1.1%)
B/L	+3,243	+17.4%
Total B/L	-185	-0.2%
D --- B/L, F, NL	-3,053)	-7.2%)
	(-1,214	(-1.0%
D --- B/L, F, NL	-1,839)	+2.2%)
D	-4,725	-6.2%
Total D	-5,939	-2.9%
F --- B/L, F, NL	-957)	-5.1%)
	(2,225	(-7.2%
F --- B/L, F, NL	-1,268)	-10.6%)
F	-5,420	-11.8%
Total F	-7,645	-9.9%
NL--- B/L, D, F	+2,078)	+2.2%)
	(-2,957	(-2.1%
NL--- B/L, F, NL	-5,035)	-10.5%)
NL	-3,417	-4.2%
Total NL	-6,374	-2.9%

Given an average decline of 2.7% for international transports and 4.6% for national transports, Belgian and French international traffic and the French and German national markets were affected more than average in 1982. As far as Belgium is concerned exports by inland waterways were down. However, with only a slight decline in imports and a growth of the domestic market of more than 3 mio t Belgian inland navigation appears to have resisted the economic recession very well.

On the other extreme, French imports, exports and national market experienced serious losses of traffic amounting to a total of 7.645 mio t or 9.9%.

3.2.7. The same analysis for 1982 compared to 1979 gives the following table :

Table 3.5. : National, export and import traffic by country, 1982 over 1979. ('000 tonnes)

Country	tonnes lost or gained	as part of total traffic on that relation
B/L --- D, F, NL	-3,276)	-11.2%)
	(-4,485	(-6.4%
B/L --- D, F, NL	-1,209)	+3.0%)
B/L	+828	+3.9%
Total B/L	-3,657	-4.0%
D --- B/L, F, NL	-6,531)	-14.1%)
	(-12,327	(-9.0%
D --- B/L, F, NL	-5,796)	-6.3%)
D	-12,012	-14.2%
Total D	-24,339	-11.0%
F --- B/L, F, NL	-2,879)	-13.8%)
	(-5,914	(-17.1%
F --- B/L, F, NL	-3,035)	-10.6%)
F	-10,373	-20.3%
Total F	-16,287	-19.0%
NL--- B/L, D, F	-4,602)	-4.6%)
	(-11,850	(-7.9%
NL--- B/L, F, NL	-7,248)	-14.5%)
NL	-8,743	-10.0%
Total NL	-20,593	-8.7%

Given an average decline of 8.8% for international traffic and 12.5% for national traffic, French and German international and national traffic were the most affected by the crisis. Again, the Belgian inland waterways came out with the least decline.

In terms of tonnes, Germany lost in international traffic more than any other Member State with The Netherlands closely following. In national traffic Germany, followed by France and The Netherlands lost important shares.

3.3. Inland waterway transport by commodities

3.3.1. The four commodities most relevant to international inland waterway sector are the following:

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

In 1982, 124.7 mio t of goods in these four NST groups were shipped between Member States, which is 69.8% of all shipments by inland waterways. The group "building materials" is by far the most important followed by ores and petroleum products.

The tonnes transported in international inland waterway traffic from 1979 to 1982 developed as follows :

Table 3.6. Inland Waterways : tonnes of NST 6, 4, 3 and 2 carried internationally ('000 tonnes)

	NST				Total	As % of overall total
	6	4	3	2		
1979	55,966	40,378	26,298	13,289	135,931	69.7%
1980	56,955	37,893	25,657	13,754	134,259	69.2%
1981	52,364	35,424	26,157	13,725	127,670	69.6%
1982	49,319	34,964	27,695	12,718	124,696	69.8%
1982-1979 growth	-6,647 -11.9%	-5,414 -13.4%	+1,397 +5.3%	-571 -4.3%	-11,235 -8.3%	
1982-1981 growth rate	-3,045 -5.8%	-460 -1.3%	+1,538 +5.9%	-1,007 -7.2%	-2,974 -2.3%	

The share of these four NST groups in total international inland waterway transport remained very stable, between 69% and 70%. However, between the groups, significant differences emerge. Transport of sand and gravel, and ores and metal waste decreased by more than 10% during the last 3 years while coal traffic went down with only 4.3% and oil transports increased by more than 5%. Also the developments during the period considered are different for these products. While transport of ores decreased gradually, transport of sand and gravel and coal peaked in 1980 and decreased during the following years. Transportation of oil products reached a lowest point in 1980 and increased afterwards.

In terms of tonnage, transport operations involving NST 6, 4, 3 and 2 of all international inland waterway operations within the Community accounted for the following shares in 1979 to 1982:

Table 3.7. : Share of NST 6, 4, 3 and 2 in total international inland waterway transport.

	NST			
	6	4	3	2
1979	28.7%	20.7%	13.5%	6.8%
1980	29.3%	19.5%	13.2%	7.1%
1981	28.5%	19.3%	14.3%	7.5%
1982	27.6%	19.6%	15.5%	7.1%

A more detailed analysis of the four main NST groups on a country by country basis is given below.

3.3.2. NST 6 : Building materials

The key industry for goods in this group is, as stated earlier, the building industry for housing, industry and public works. In 1982, high interest rates kept construction activity at a low level. Moreover, the budgetary problems of Member States forced governments to further limit their expenditure in the field of public works. And uncertain prospects in industry pushed investments in industrial construction further down.

The effects of these negative tendencies on transport flows of sand and gravel is shown in the following table.

Table 3.8. Inland waterways-tonnes of NST 6 carried on bilateral relations ('000 tonnes)

TO FROM		B/L	D	F	NL
B/L	1979		842	1,079	5,644
	1980		781	1,121	6,248
	1981		739	1,129	5,375
	1982		800	999	5,098
	1982-1979		-42	-80	-546
	growth		-5.0%	-7.4%	-9.7%
	1982-1981		+61	-130	-277
growth rate		+8.3%	-11.5%	-5.2%	
D	1979	1,646		263	19,735
	1980	1,509		258	19,814
	1981	1,501		323	18,434
	1982	1,851		270	17,443
	1982-1979	+205		+7	-2,292
	growth	+12.5%		+2.7%	-11.6%
	1982-1981	+350		-53	-991
growth rate	+23.3%		+16.4%	-5.4%	
F	1979	550	9,644		1,517
	1980	517	9,352		1,278
	1981	429	8,752		1,319
	1982	412	7,974		1,238
	1982-1979	-138	-1,670		279
	growth	-25.1%	-17.3%		-18.4%
	1982-1981	-17	-778		-81
growth rate	-4.0%	-8.9%		-6.1%	
NL	1979	12,127	2,641	278	
	1980	13,142	2,664	271	
	1981	11,853	2,251	259	
	1982	11,079	1,939	216	
	1982-1979	-1,048	-702	-62	
	growth	-8.6%	-26.6%	-22.3%	
	1982-1981	-774	-312	-312	
growth rate	-6.5%	-13.9%	-16.6%		

As a result, and after an appreciable growth of 1.8% in 1980, international traffic between Member States of sand and gravel fell by 8.1% or about 4.5 mio t in 1981, and by 5.8% or about 3.0 mio t in 1982.

Table 3.8. shows a broad geographical spread, with all relevant Member States taking a share. All important traffic relations with transports of 5 mio t or more encountered losses of more than 5% in transport activity in 1982 compared to 1981. 2.820 mio t or 92.5% of the total loss of tonnage was sustained on these four relations (B/L ---- NL, NL ---- B, D ---- NL, and F ---- D). Only two relations, both of limited importance, encountered positive growth rates.

The same four traffic relations lost about 5.5 mio t in the period 1979-1982. This explains more than 80% of the loss in transport activity in sand and gravel. Only one relation, B/L ---- D, shows a positive development.

3.3.3. NST 4 : Ores and metal waste

Because NST 4 goods are raw materials for the steel industry, the quantities carried are determined by the effects of the recession and the restructuring of the steel industry. Consequently, transport activity went down 13.4% in the period 1979-1982 or 5.414 mio t. The decline in activity reached 6.2% on 1981 and 1.3% in 1982. Given the European Communities capacity policy in the steel sector, a further reduction in transport activity in the years to come is to be expected.

As table 3.9. shows, only one traffic relation is of real importance: NL ---- D. However, this relation lost more than average and consequently its relative importance in international transport of ores and metal waste diminished. In 1979 87.5% of all international NST 4 transports was carried on that relation. In 1982 this percentage fell to 82.4. The decrease amounted to 7.3% in 1980, 8.9% in 1981, and 3.5% in 1982. The total loss on the specific relation during the period 1979-1982 of 6.535 mio t was not compensated by the gain of 1.121 mio t on all other relations taken together. One third of this gain could be noted on the relation B/L --- D (+361,000 t) and half of it on the relation NL --- B/L (+628,000 t)

Table 3.9. Inland waterways-tonnes of NST 4 carried on bilateral relations ('000 tonnes)

TO FROM		B/L	D	F	NL
B/L	1979		742	533	188
	1980		673	568	129
	1981		596	540	146
	1982		1,103	618	145
	1982-1979		+361	+85	-43
	growth		48.7%	+15.9%	-22.9%
	1982-1981		+507	+78	-1
growth rate		+85.1%	+14.4%	-0.7%	
D	1979	307		91	77
	1980	214		175	62
	1981	252		128	150
	1982	235		209	121
	1982-1979	-72		+118	+44
	growth	-23.5%		+129.7%	+57.1%
	1982-1981	-17		+81	-29
growth rate	-6.7%		+63.3%	-19.3%	
F	1979	37	2		0
	1980	33	46		0
	1981	6	9		0
	1982	9	21		0
	1982-1979	-28	+19		0
	growth	-75.7%	+950%		0
	1982-1981	+3	+12		0
growth rate	+50%	+133%			
NL	1979	1,809	35,342	1,250	
	1980	1,984	32,766	1,292	
	1981	2,660	29,853	1,084	
	1982	2,437	28,807	1,259	
	1982-1979	+628	-6,535	+9	
	growth	+34.7%	-18.5%	+0.7%	
	1982-1981	-223	-1,046	+175	
growth rate	-8.4%	-3.5%	+16.1%		

3.3.4. NST 3: Petroleum Products

Developments in this traffic depend in particular on the following factors:

- effects of policies to encourage energy savings;
- the general economic situation and the level of industrial activity;
- oil price and dollar fluctuations;
- government energy policies.

The overall deterioration of traffic of oil products as shown in table 3.10. came to a halt in 1981 (+1.9%) and improved considerably in 1982 (+5.9%) following the reduction in oil prices. As Table 3.10. shows, there is a rather broad geographical spread, with NL ---- D being by far the most important relation with about 45% of total international intra-community traffic of NST 3 by inland waterways.

In terms of traffic developments in 1982 the most important features to note are the positive developments in the relations NL --- D (+13.6% or about 1.5 mio t), B/L (+20.5% or about 1 mio t) and the decrease in the relation B/L --- NL (-35.6% or about 1.2 mio t).

Table 3.10. Inland waterways-tonnes of NST 3 carried on bilateral relations ('000 tonnes)

TO FROM		B/L	D	F	NL
B/L	1979		3,119	128	2,210
	1980		3,555	173	3,115
	1981		3,594	170	3,318
	1982		3,691	262	2,137
	1982-1979		+572	+134	-73
	growth		+18.3%	+104.7%	-3.3%
	1982-1981		97	+92	-1,181
growth rate		+2.7%	+54.1%	-35.6%	
D	1979	227		148	842
	1980	201		165	833
	1981	133		126	1,213
	1982	356		154	1,092
	1982-1979	-129		+6	+250
	growth	-56.8%		+4.1%	+29.7%
	1982-1981	+223		+28	-121
growth rate	+167.7%		+22.2%	-10.0%	
F	1979	9	1,175		22
	1980	1	966		25
	1981	4	1,149		10
	1982	6	865		32
	1982-1979	-3	-310		+10
	growth	-33.3%	-26.4%		+45.5%
	1982-1981	+2	-284		+22
growth rate	+50%	-24.7%		+220	
NL	1979	4,655	13,270	493	
	1980	4,819	11,448	356	
	1981	4,854	11,404	182	
	1982	5,850	12,951	299	
	1982-1979	+1,195	-319	-194	
	growth	+25.7%	-2.4%	-39.4%	
	1982-1981	+996	+1,547	+177	
growth rate	+20.5%	+13.6%	+97.1%		

3.3.5. NST 2 : Solid mineral fuels

Transport developments in this sector depend in particular on the economic situation in the steel industry and on the results of energy policy decisions. Therefore, a distinction has to be made between the markets for the carriage of coal for the steel industry, and the market for coal transports for power stations. Germany, France and Belgium are using their indigenous coal for steel production. Exports of this coal are decreasing. On the other hand, some countries, in particular Germany and the Netherlands, are using imported coal, originating in particular from the U.S., Austria and Poland, for energy production. However, this tendency, prominent in 1979 and 1980, is slackening because of the reduction and stabilisation of oil prices. France and Belgium depend to an increasing extent on nuclear power stations for energy production.

Table 3.11. shows the results of these developments. In 1980 the overall carriage of coal increased by 3.5%. After stabilisation in 1981 (-0.2%), 1982 shows a sharp reduction in transport activity (-7.3%). German exports fell during the period 1979-1982 by about 3 mio t or 35%, while German imports went up by 2.6 mio t or 114%. In 1982 exports fell with about 1 mio t or 15.5% and imports rose by 0.644 mio t or 15%.

Table 3.11. Inland waterways-tonnes of NST 2 carried on bilateral relations ('000 tonnes)

TO FROM		B/L	D	F	NL
B/L	1979		109	272	116
	1980		325	334	123
	1981		601	391	245
	1982		566	109	151
	1982-1979		+457	-163	-35
	growth		+419%	-59.9%	-30.2%
	1982-1981		-35	-282	-94
growth rate		-5.8%	-72%	-3.4%	
D	1979	1,784		2,174	4,392
	1980	1,121		1,624	4,393
	1981	1,074		1,362	3,974
	1982	819		1,232	3,366
	1982-1979	-965		-942	-1,026
	growth	-54.1%		-43.3%	-23.4%
	1982-1981	-255		-130	-608
growth rate	-23.7%		-9.5%	-15.3%	
F	1979	25	125		0
	1980	0	120		0
	1981	1	167		20
	1982	2	144		17
	1982-1979	-23	+19		+17
	growth	-92%	15.2%		-
	1982-1981	+1	-23		-3
growth rate	+100%	-13.8%		60%	
NL	1979	1,568	2,050	674	
	1980	1,935	2,221	1,558	
	1981	1,670	3,480	770	
	1982	1,418	4,182	712	
	1982-1979	-150	+2,132	+38	
	growth	-9.6%	+104%	+5.6%	
	1982-1981	-252	702	-58	
growth rate	-15.1%	+20.2%	-7.5%		

3.4. Inland waterway transport by transport market

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

3.4.2. Rhine

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

Table 3.12. : Traditional Rhine traffic ('000 tonnes).

1979	1980	1981	1982	1982- 1979	Growth	1982- 1981	Growth Rate
205,473	198,166	189,731	184,253	-21,220	-10.3%	-5,478	-2.9%

During the period 1979-1982 transport activity in tonnes decreased by 10.3% or about 21 mio t. After 1979, which was the best year for inland waterway Rhine transport since 1974, which was the best year ever, the downward trend on a yearly basis amounted to 3.6%, 4.3% and 2.9% in consecutive years.

In terms of tonnekilometres the negative development of the last few years is less dramatic but nevertheless important, as is shown in the following table.

Table 3.13. : Traditional and total Rhine traffic ('000,000 tkm)

	Traditional Rhine traffic	Dutch Rhine traffic	Total Rhine Traffic
1979	36,772	20,991	57,763
1980	36,326	20,547	56,873
1981	35,486	19,476	54,962
1982	35,143	19,250	54,393
1982-1979	-1,629	-1,741	-3,370
growth	-4.4%	-8.3%	-5.8%
1982-1981	343	-226	-569
growth rate	-1%	-1.2%	-1%

Another indicator for international Rhine traffic is the development in traffic registered passing the German/Dutch border at Emmerich/Lobith. Tables 3.14. and 3.15. give information on upstream and downstream traffic, also by NST groups.

Table 3.14. International Rhine traffic passing Emmerich/Lobith upstream ('000 t)

	1979	1980	1981	1982	1982-1979	Growth	1982-1981	Growth rate
Total	85,732	83,771	77,990	81,885	-3,847	-4.5%	+3,895	+5.0%
NST Chapters								
0	2,824	2,779	2,781	2,548	-276	-9.8%	-233	-8.4%
1	6,932	7,148	6,501	7,283	+351	+5.1%	+782	+12.0%
2	3,177	5,148	5,440	5,800	+2,623	+82.6%	+360	+6.6%
3	19,301	18,020	17,265	19,419	+118	+0.6%	+2,154	+12.5%
4	37,669	35,236	31,942	31,612	-6,057	-16.1%	-330	-1.0%
5	4,498	3,925	3,613	3,980	-518	-11.5%	+367	+10.2%
6	3,617	3,534	2,984	2,767	-850	-23.5%	-217	-7.3%
7	2,487	2,588	2,320	2,828	+341	+13.7%	+520	+22.4%
8	4,688	4,653	4,504	5,033	+345	+7.4%	+529	+11.8%
9	539	740	640	615	+76	+14.1%	-25	-3.9%

Table 3.15. International Rhine traffic passing Emmerich/Lobith downstream ('000 t)

	1979	1980	1981	1982	1982- 1979	Growth	1982- 1981	Growth rate
Total	47,577	45,256	44,642	41,837	5,740	-12;1%	-2,805	-6.3%
NST Chapters								
0	397	504	836	964	+567	+142.8%	+128	+15.3%
1	1,493	1,567	1,702	1,703	-210	-14.1%	+1	+0.1%
2	6,067	5,446	5,106	4,262	-1,805	-29.8%	-844	-16.5%
3	900	980	1,227	1,257	+357	+39.7%	+30	+2.4%
4	380	276	391	368	-12	-3.2%	-23	-5.9%
5	6,597	5,980	6,467	5,383	1,214	-18.4%	-1,084	-16.8%
6	23,883	23,545	22,004	21,342	-2,541	-10.6%	-662	-3.0%
7	2,306	1,978	1,706	1,757	-549	-23.8%	+51	+3.0%
8	3,319	2,733	2,861	2,736	-583	-17.6%	-125	-4.4%
9	2,235	2,227	2,342	2,065	-170	-7.6%	-227	-11.8%

During the period 1979-1980 total transport passing Emmerich/Lobith decreased by 7.2%, but in 1982 a small growth of 0.9% could be noted. In 1980 and 1982 downstream traffic turned out to be worse than upstream traffic, while in 1981 upstream traffic lost 6.9% and downstream traffic only 1.6%.

In upstream traffic two goods categories (NST 4 and 3) comprise two thirds of total traffic on that relation. Transport of ore and metal waste decreased with 6 mio t or 16.1% during the last three years reflecting the depressed steel market. The transportation of oil products remained rather stable over these years, but 1980 and 1981 showed a decrease while 1982 showed an increase of 12.5%.

Downstream traffic consists of about 50% of sand and gravel (NST 6). Tonnes transported decreased by 10.6% in the period 1979-1982. In particular 1981 and 1982 were years with important losses in demand for transport services of these goods.

3.4.3. North-South

About 25% of total international intra-Community traffic by inland waterways uses the North-South network between the Netherlands, Belgium and France. The picture of this market by NST-category is shown in the following table.

Table 3.16. North-South traffic ('000 tonnes)

	1979	1980	1981	1982	1982- 1979	Growth	1982- 1981	Growth rate
Total	52,465	55,670	52,529	49,318	-3,147	-6.0%	-3,211	-6.1%
NST Chapters								
0	7,360	7,513	6,631	5,722	-1,638	-22.3%	-909	-13.7%
1	5,614	5,485	4,887	4,329	-1,285	-22.9%	-558	-11.4%
2	1,790	2,162	2,116	1,610	-180	-10.1%	-506	-23.9%
3	6,858	7,991	8,226	8,225	+1,367	+19.9%	-1	0.0%
4	2,399	2,591	3,254	3,437	+1,038	+43.3%	+183	+5.6%
5	2,717	2,592	2,478	2,164	-553	-20.4%	-314	-12.7%
6	19,808	21,452	19,289	18,076	-1,732	-8.7%	-1,213	-6.3%
7	2,489	2,515	2,506	2,505	+16	+0.6%	+1	+0.0%
8	2,713	2,592	2,419	2,187	-526	-19.4%	-232	-9.6%
9	717	777	723	1,063	+346	+48.3%	+340	+47.0%

As in the case of the Rhine the trend over the years 1979-1982 is downward; a decrease in traffic of 6.0% could be noted. However, transport activity reached its highest level in 1980 while on the Rhine 1979 was the best year during the last few years.

Sand and gravel (NST 6) is by far the most important commodity shipped on this market, followed by agricultural products (NST 0) and oil products (NST 3). In terms of tonnes, transport of NST 6 and 0 decreased most over the last few years while agricultural products, foodstuffs (NST 1) and metal products (NST 3) lost most in percentage terms. On the other hand, transports of oil products (NST 3), ore and metal waste (NST 4), and machinery (NST 9) increased considerably.

About the same picture emerges if we compare 1982 with 1981.

3.5. Fleet developments

From the various indicators of the developments on the inland waterway transport markets, a clear downward trend in demand of about 10% in tonnes and 6% in tonnekilometres during the period 1979-1982 emerged. In this paragraph an analysis of the effects of the depression on the supply side, i.e. the development of the fleet, is given.

The analysis will be conducted at two levels : at the level of the total fleet and at the level of the Rhine fleet, which consists of those vessels having a Rhine certificate and an official ship's number. Finally a comparison of the results of the analysis with the development of overall transport activity (par. 3.1.2.) and transport activity on Rhine (par. 3.4.2.) is given in order to indicate the market situation in terms of overcapacity.

3.5.1. Total fleet

Table 3.17. shows the size of the fleet - in number of vessels and carrying capacity - at various dates. Figures are also given for the fleets of the relevant Member States.

Table 3.17. : Fleet developments : total fleet in number of vessels and carrying capacity ('000 tonnes)

	1.1. 1979	1.1. 1982	1.1. 1983	1983- 1979	Growth	1983- 1982	Growth rate
Total:vessels	19,397	18,128	17,707	-1,690	-8.7%	-421	-2.3%
carrying capacity	13,171	13,025	12,947	-224	-1.7%	-78	-0.6%
B :vessels	3,321	2,869	2,758	-563	-17.0%	-111	-3.9%
carrying capacity	1,955	1,818	1,785	-170	-8.7%	-33	-1.8%
L :vessels	20	17	16	-4	-25%	-1	-5.9%
carrying capacity	12	11	11	-1	-10.2%	0	-3.3%
D :vessels	4,230	3,609	3,496	-734	-17.4%	-113	-3.2%
carrying capacity	3,859	3,548	3,459	-400	-10.4%	-89	-2.5%
F :vessels	5,525	5,192	4,976	-549	-9.9%	-216	-4.2%
carrying capacity	2,618	2,553	2,464	-154	-6.9%	-89	-3.5%
NL :vessels	6,301	6441	6,461	+160	+2.5%	+20	+0.3%
carrying capacity	4,727	5095	5,228	+501	+10.6%	+133	+2.6%

During the last few years, the total fleet decreased by 1690 vessels (-8.7%) and 224,000 tonnes (-1.7%) carrying capacity. in 1982 alone the decrease in the number of vessels reached 421 (-2.3%) and 78,000 tonnes (-0.6%) in carrying capacity.

This trend is clearly demonstrable in all Member States except The Netherlands. A more than average decrease of the fleet from the point of view of carrying capacity could be noted in Belgium (-17.0%), Germany (-10.4%), Luxembourg (-10.2%) and France (-6.9%). However the Dutch fleet increased with 160 vessels (+2.5%) and 501,000 tonnes carrying capacity (+10.6%). One of the reasons behind the development of the Dutch fleet might be the existence in the Netherlands of a general investment program (W.I.R.) from which also the inland navigation sector could receive a 12% investment premium.

Consequently, the relative shares of the national fleets in the total fleet changed considerably from 1.1.1979 to 1.1.1983, as shown below.

Table 3.18. : National shares in total fleet capacity.

	1.1.1979	1.1.1983	difference
B	14.8%	13.8%	-1.0
L	0.1%	0.1%	0.0
D	29.3%	26.7%	-2.6
F	19.9%	19.0%	-0.9
NL	35.9%	40.4%	+4.5

With a few minor changes the same picture emerges if the figures for 1.1.1982 and 1.1.1983 are compared.

In all Member States the change in the number of vessels was more important than the change in tonnes carrying capacity. It follows that average carrying capacity increased and that smaller vessels disappeared from the market.

3.5.2. Rhine fleet

Table 3.19. shows the developments of the Rhine fleet - in number of vessels and carrying capacity - at various dates, overall and by flag.

Table 3.19. : Fleet developments : Rhine fleet in number of vessels and carrying capacity ('000 tonnes)

	1.1. 1979	1.1. 1982	1.1. 1983	1983- 1979	Growth	1983- 1982	Growth rate
Total* :vessels	11,672	11,720	11,727	+55	+0.5%	+7	+0.1%
carrying capacity	9,475	10,149	10,426	+951	+10.0%	+277	+2.7%
B :vessels	1,727	1,755	1,756	+29	+1.7%	+1	+0.1%
carrying capacity	1,304	1,381	1,430	+126	+9.7%	+49	+3.5%
D :vessels	3,156	3,017	2,924	-232	-7.4%	-93	-3.1%
carrying capacity	3,245	3,209	3,121	-124	-3.8%	-88	-2.7%
F :vessels	823	928	908	+85	+10.3%	-20	-2.2%
carrying capacity	480	552	521	+41	+8.5%	-31	-5.6%
NL :vessels	5,575	5,602	5,734	+159	+2.9%	+132	+2.4%
carrying capacity	3,879	4,364	4,724	+845	+21.8%	+360	+8.2%

*including the Swiss fleet

On some points the development of the total fleet and of the Rhine fleet shows important differences. While the total fleet faced a decline in number of vessels and carrying capacity, the Rhine fleet increased by 55 vessels (+0.5%) and 951,000 tonnes carrying capacity (+10.0%). With the exception of the German fleet, all flags take a share in this development.

However the relative shares of each Member State in the total Rhine fleet decreased, with the exception of the Netherlands, as will be shown in the following table :

Table 3.20. : National shares in total fleet capacity.

	1.1.1979	1.1.1983	difference
B	13.8%	13.7%	-0.1
D	34.2%	29.9%	-4.3
F	5.1%	5.0%	-0.1
NL	40.1%	45.3%	+5.2

Here, the trend goes in the same direction as in the case of the total fleet. The different developments of the total fleet and of the Rhine fleet can be explained to a large extent by the increasing share in the total fleet of carrying capacity having a Rhine certificate as the following figure shows.

Table 3.21. : Share in total fleet of carrying capacity having a Rhine certificate.

	1.1.1979	1.1.1983	difference
B	66.7%	80.1%	+13.4
L	84.1%	90.2%	+6.1
D	18.3%	21.1%	+2.8
F	82.1%	90.4%	+8.3
NL	67.7%	75.7%	+8.0

In particular the owners of Belgian flag vessels have requested and received Rhine certificates in the past few years. This development could be explained by the facilities to be given to those having a Rhine permit with the introduction in the near future of a European certificate following the adoption by the Council of Directive 82/714/EEC (O.J. L301 of 25.10.82, p.1) and of a Dutch certificate ("vaarbewijs").

3.5.3. Overcapacity

In the beginning of the second half year 1982 clear signs of overcapacity emerged. On the "bourses" the number of waiting days went up considerably. Rhine traffic and transport prices came under severe pressure. Given the increase in the Rhine fleet discussions started, in particular in the C.C.R., on this dramatic economic development and on measures to remedy the situation.

In estimating overcapacity, supply and demand, as well as a number of other factors should be taken into account. In the first place the demand development in different parts of the market (dry bulk, liquid cargo) should be analysed separately. Secondly the improvement in productivity following the modernization of existing vessels, construction of more efficient ones, better loading and unloading facilities and infrastructure improvements should be taken into account. Moreover the size of a certain capacity to answer peaks in demand and low water levels should be established, as well as the extent to which it was needed during the base year. Finally a representative base year should be selected.

In a sophisticated analysis the Economic Committee of the C.C.R. took all these factors into account and arrived at an estimated overcapacity of the Rhine market for dry bulk inland waterway transport services of 20.5% on 1.1.1983. In tanker tonnage supply and demand were in equilibrium. On this basis total overall overcapacity could be estimated to be about 17%.

The development of a rough estimate of overcapacity next to the more sophisticated one established by the C.C.R. is justified by the established difference in developments of the total fleet and the Rhine fleet, given the fact that the C.C.R. based its calculations only on Rhine fleet developments. This estimate will be less accurate since it will only take into account developments in supply, demand and productivity improvements (this latter element estimated by C.C.R. experts as being 1% per year). This need for a certain reserve capacity and the distinction between markets for dry and liquid cargo were not included in the calculation.

The following table 3.22. will present the estimated overcapacity for the total fleet and the Rhine fleet. As in the case of the C.C.R. 1979 has been selected as the base year which is considered in general as a year with a normal capacity situation.

Table 3.22. : Estimated overcapacity of the total fleet and the Rhine fleet (1979-1982).

	Total fleet	Rhine fleet
demand (tkm)	-6.2% (§3.1.2.)	-5.8% (§3.4.2.)
supply (t. carrying capacity)	-1.7% (table 3.14.)	+10.0% (table 3.15.)
productivity increase (1%/year)	-4.5%	-15.8%
	+4.0%	+4.0%
estimated overcapacity	-8.5%	-19.8%

As table 3.22. makes clear, the result of overcapacity calculations are quite different if starting points are different : total fleet and total demand or Rhine fleet and "Rhine" demand. While the Rhine seems to suffer from an overcapacity of about 20% or 1.9 mio t carrying capacity, the total fleet encounters "only" 8.5% overcapacity or 1.1 mio t. Moreover, the two calculations are not compatible. If both calculations were correct an important undercapacity on the international North/South markets and the national market should have emerged. However, clear signs of overcapacity have appeared on all markets: depressed prices on the Rhine and an increasing number of waiting days at the "bourses" in national Dutch, Belgian and French markets and on the international North/South relations.

The difference between the two calculations could be explained by the increase in the share in total carrying capacity of the carrying capacity having a Rhine certificate. Therefore, the figure of 19.8% overcapacity on the Rhine might well be an overestimation of the actual situation as a result of the growth by 9.5 percent points in the formal participation of the total fleet in the Rhine fleet, as was shown in table 3.21., which could have resulted in only a small, if any, growth of actual participation the Rhine market.

The same overestimation could have effected the calculations made by the C.C.R. for the dry bulk fleet.

3.6. Transport Inquiry Survey

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

On the Rhine, these surveys are conducted by the Central Rhine Commission in cooperation with the European Commission among about 25 shipowners.

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

3.6.1. Rhine

The development of Rhine traffic throughout the year evolved from a rather good first quarter to a very bad fourth quarter if the quarters in 1982 are compared with the same quarters of 1981. The aggregate balance of opinions on transport activity, utilisation of capacity and forecasts of activity and utilisation, which showed this tendency very clearly, is confirmed by the quarterly statistics given below.

Table 3.23. Traditional Rhine traffic

	'000 tonnes 1982	'000 tonnes 1981	Change	'000.000 tkm 1982	'000.000 tkm 1981	Change
<u>Quarter</u>						
1)	93,340	93,230	+0.1%	17,562	16,984	+3.4%
2)						
3	46,471	47,945	-3.1%	8,946	9,252	-3.3%
4	44,442	48,208	-7.8%	9,635	9,227	-6.4%

Freight rates were reported to remain stable, but at a very low level.

3.6.2. North/South

Waiting time is one of the best indicators of economic activity on the North/South market. The quarterly average number of waiting days for international traffic on the "bourse" in The Netherlands, Belgium and France in 1982 was considerably higher than in 1981, except in The Netherlands and Belgium in the first quarter and in France in the fourth quarter. The quarterly averages are shown in the following table.

Table 3.24. : Quarterly average of waiting days in international North/South traffic

Country	Year	Q1	Q2	Q3	Q4
B*	1981	7.0	6.0	8.0	4.5
	1982	5.2	7.5	8.5	7.5
F	1981	8.5	7.0	15.3	14.0
	1982	9.2	18.0	16.1	13.2
NL	1981	8.3	4.4	5.6	5.2
	1982	6.5	6.2	9.8	7.1

* domestic traffic included

The balance of opinion of Dutch and Belgian participants in the surveys were negative, and become more and more pessimistic throughout the year as far as transport activity and forecast of activity is concerned.

Transport prices were considered to be stable at a low level.

CHAPTER 4

RAIL

4.1. Downward trend continued in 1982

The downward trend in transport activity for the railway sector that has existed already for several years has not been halted in 1982 and resulted in a total decline of 10.8% at the level of the EC-9. Also for 1983 a further drop in activity of 5.1% is forecast. Table 4.1. gives the 1982 and 1983 absolute values and growth rates for 6 Member States' inward bound as well as outward bound traffic. It appears that in 1982 mainly Germany, the Netherlands and the B/L suffered from negative growth.

Table 4.1.: International transport of goods by rail

a. inward bound traffic
(in 1000 tonnes)

	1981		1982	
	level	Growth rate (%)	level	Growth rate (%)
Denmark	816.048	+13.9	1,038.533	+27.3
B/L	17,462.916	-10.1	15,475.842	-11.4
Netherlands	4,859.931	+0.6	4,342.144	-10.7
Italy	13,403.570	-6.6	12,554.395	-6.3
France	15,112.141	-15.2	13,782.588	-8.8
Germany	15,619.775	-10.9	12,888.766	-17.5
EC-9	68,132.071	-9.7	60,807.682	-10.8

b. outward bound traffic
(in 1000 tonnes)

	1981		1982	
	level	Growth rate (%)	level	Growth rate (%)
Denmark	380.919	-4.3	564.328	+48.2
B/L	11,752.438	-9.5	10,471.656	-10.9
Netherlands	7,390.648	-21.2	5,821.297	-21.2
Italy	5,336.097	+1.7	4,940.301	-7.4
France	22,122.813	-14.0	20,541.893	-7.2
Germany	20,732.265	-9.1	18,106.017	-12.7
EC-9	68,132.071	-9.7	60,807.682	-10.8

4.2. The relative importance of bilateral flows in 1982

The results for 1982 are summarized in table 4.2. Rail transport of goods into France (33.8%) and Germany (29.8%) count for over 60%. Rail transport from the B/L (25.5%), France (22.7%), Germany (21.2%) and Italy (20.7%) is of about equal importance and represents 90% of the total.

Table 4.2.: Relative importance of the in-and outward flows in 1982 (in %)

	inward	outward
Denmark	0.9	1.7
B/L	17.2	25.5
Netherlands	9.6	7.1
Italy	8.1	20.7
France	33.8	22.7
Germany	29.8	21.2

4.3. Modal Split : Rail is losing market share

The gloomy development of railway activity resulted in a further decrease in market share. (see table 4.3.)

Table 4.3.: Relative share of rail in total transport

	1981		1982	
	inward	outward	inward	outward
Denmark	19.4	8.0	22.2	11.2
B/L	19.2	15.5	17.3	13.9
Netherlands	5.9	5.4	5.6	4.3
Italy	51.5	32.1	49.1	30.4
France	25.6	31.1	23.9	30.2
Germany	10.7	19.8	9.1	18.1
EC-9	16.2	16.2	14.9	14.9

With the exception of Denmark, rail has suffered on all the relations.

4.4. Coke and metal products responsible for weak performance of rail transport.

Solid mineral fuels (33.0%) and metal products (41.6%) dominate the activity of the railway sector. Table 4 indicates that most of the other NST-categories are of minor importance.

Table 4.4.: Importance of NST-Categories for rail activity in 1982 (EC-9).

	share (%)
NST 0	0.3
NST 1	0.7
NST 2	33.3
NST 3	0.1
NST 4	7.9
NST 5	41.6
NST 6	0.8
NST 7	0.4
NST 8	11.8
NST 9	3.1
Total	100

CHAPTER 5

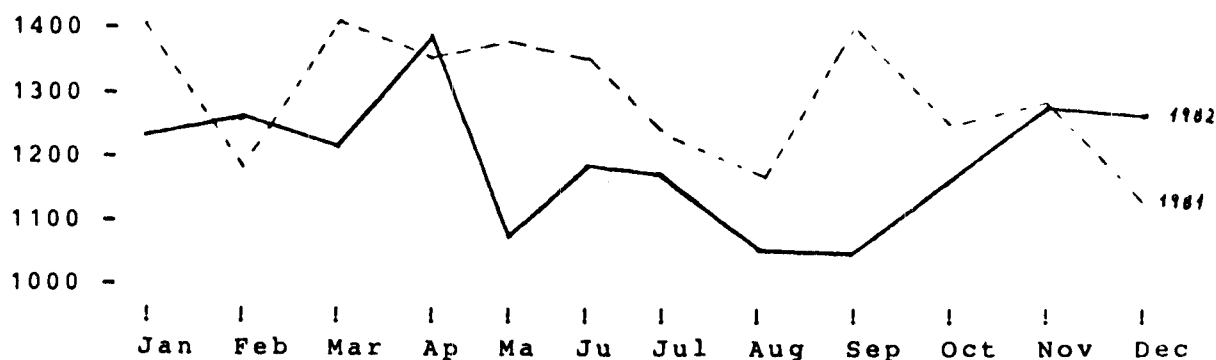
COMBINED TRANSPORT

The 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.

5.1. Container Transport

The continuing generally bad economic situation and considerable competition in the international transport market has reduced the container transport total in 1982 by 8.3% compared to 1981, with about 14,370,300 feet units being transported in 1982, against 15,675,100 feet in 1981.

Figure 5.1. Monthly traffic (comparison 1981-1982)



In 1982 traffic peaked in April (1,392,150 feet) and then declined sharply in May (22.6% down on the previous month). This low level continued until the last quarter, when it started to rise again.

Table 5.1.: Proportion on the total traffic (%)

	Maritime Container Traffic	Continental traffic	G.B. + EIRE	USSR	Total in feet
1981	59.6	32.0	5.3	3.1	15,675,100
1982	59.1	34.1	4.7	2.1	14,370,300

Maritime container traffic to and from the European container ports with 8,496,250 feet still represents the highest proportion of total traffic, but the percentage is dropping steadily.

The Continental or inner European traffic with 4,903,330 feet increased by 2.1% and is the only sector to show an improvement. The other two sectors, the direct traffic with GB+EIRE (667,570 feet) and the container traffic overland between the Community and USSR (for the transiberian route) (303,160 feet) share the lowest percentage and have dedined still further this year.

Table 5.2.: Proportion of loaded and empty containers (%)

	Maritime Container Traffic		Continental traffic		G.B. + EIRE		USSR		Total in feet	
	L	E	L	E	L	E	L	E	L	E
1981	70.0	30.0	59.2	40.8	93.6	6.4	73.6	26.4	67.9	32.1
1982	71.4	28.6	58.5	41.5	98.2	1.8	84.0	16.0	68.5	31.5

L= Loaded

E= Empty

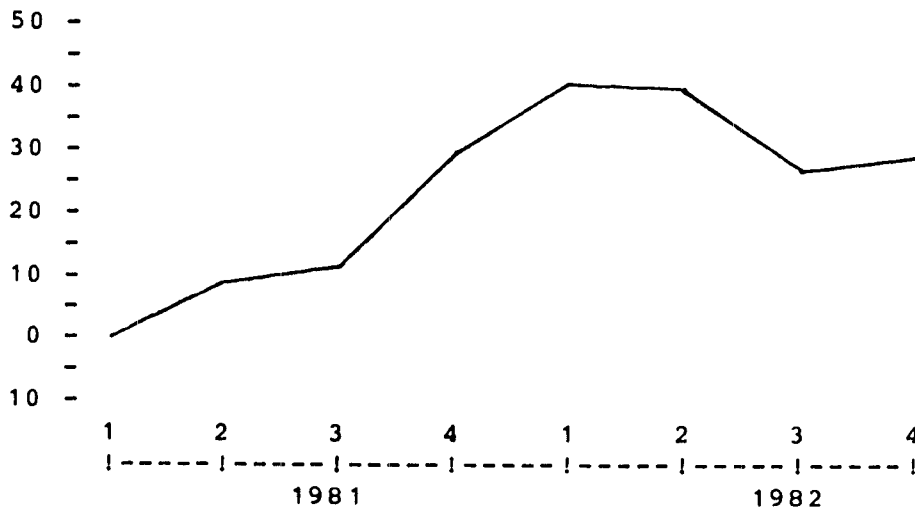
Compared to the previous year, the percentage of loaded containers has improved. The continental sector has the highest share of empty containers (41.5%) while GB+EIRE enjoys the highest percentage of loaded containers.

Average revenue levels in UIC francs increased by about 7% for container/kilometres following tariff adjustments in July 1982.

5.2. Piggy-back transport

The data are based on 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.

Figure 5.2.



Kombiverkehr D	Trailstar NL
Novatrans F	TRW B
I (except to D)	FERPAC I (to D)
UK	HUPAC S

Although 1982 shows an increase of 20.4% over the 1981 total, this was achieved principally by high figures in the first half of the year. Thus the first quarter of 1982 was 46% higher than the same quarter of 1981, but the last quarter was -3% on the previous year.

Experience varies considerably from one company to another. The company dealing with the largest number of countries is Kombiverkehr and in 1982 achieved a 41.2% share of the market, this represented a 25% increase over 1981, a figure bettered only by FERPAC (37%).

Novatrans, trading in France, Italy and the United Kingdom, despite steadily dropping figures from quarter to quarter, still managed to obtain a total satisfactorily superior to 1981.

Table 5.3.: International traffic 1982 (plus charge from previous year)

ORIGINE	DESTINATION	D	F	I	NL	B	UK	GR	EUR10	ESP	A	YUG	SUI	TOTAL
D	(Kombiverkehr)		4633 (35)	21679 (14)	892 (100)	210. (-19)		475 (-38)	27889 (16)	5327 (103)	2089 (68)	961 (-38)	13881 (28)	50147 (25)
F	(Novatrans)	3657 (45)		6764 (16)		585 (59)	103 (-42)		11109 (25)	27 (-95)				11136 (18)
I	(Novatrans)		6436 (8)			7096 (13)	6388 (17)		19920 (13)					19920 (13)
UK	(Novatrans)		86 (-47)	5387 (9)					5473 (7)					5473 (7)
NL	(Trailstar)	832 (80)	5 (25)	3804 (11)					4641 (20)		166 (-46)		216 (-31)	5023 (11)
B	(TRW via France)		621 (10)	8261 (18)					8882 (18)	1723 (25)				10605 (19)
B	(TRW via Germany)	210 (-4)		206 (36)					416 (12)		701 (-5)		40 (471)	1157 (4)
I	(FERPAC)	8429 (37)							8429 (37)					8429 (37)
S	(HUPAC)	9905 (24)							9905 (24)					9905 (24)

CHAPTER 6

REGIONAL DISTRIBUTION OF TRAFFIC FLOWS

6.1. The most important regional flows of goods transported by the three inland modes have been analysed, based on the geographical figures prepared by the IFO-Institute of Munich on behalf of the Commission.

Only the most important flows (from the point of view of the importing or exporting country) are analysed for 1982.

In the following a short comment is given for the most important regions.

Ireland

For outward and inward flows the UK is by far most important, with respectively 86.4% and 88.3%.

Denmark

Germany is the most important destination (71.6%) and origin (71.4%). The region "Norddeutsche Küstenländer" is very important (56.1% of all destinations and 42.2% of all origins).

B/L

Of about equal importance as destinations are the Netherlands (30.6%), France (32.6%) and Germany (29.8%).

The North-West of France counts for 19.6% and Nordrhein-Westfalen for 15.4%. The same regions are important as origins at respectively 44.8% (Netherlands), 25.4% (France) and 24.0% (Germany).

Netherlands

The most important destination is Germany with 61.7% (Nordrhein-Westfalen counts for 42.8%).

At the second place comes B/L with 28.7%.

The most important country of origin is also Germany (58.0%) followed by B/L (30.5%).

Italy

Germany (45%) is the most important country of destination (most important region is Bayern with 12.7%).

Second comes France (35.5%) and the South-East is the most important region with 14.5%.

From the point of view of origin France (43.9%) comes before Germany (38.5%).

France

- North-West : with 49.5% B/L is the most important destination, followed by Germany (20.6%). (Mainly Nordrhein-Westfalen (8.5%) and Rhein-Pfalz-Saar (5.4%).
B/L is also the most important country of origin of the transport flows with 72.6%.

- Paris-region : B/L (30.3%) is the most important destination, followed by Italy (28.6%) and Germany (22.1%).
From the origin point of view B/L (31.6%) comes first, followed by Germany (26.2%).
(Mainly Nordrhein-Westfalen 11%).

- South-West : Italy is the most important destination (34.9%) followed by Germany (23.5%).
B/L is the most important origin (30.7%), followed by Germany (27.1%) and Italy (21.5%).

- Center : Italy (42.4%), the B/L (23.2%), Germany (16.8%) and to a lesser extent the Netherlands (12.4%) are the most important destinations.
Germany (30.5%) with Nordrhein-Westfalen 11.8%), the B/L (29.8%), the Netherlands (20.3%) and Italy (15.7%) are important origins.

- South-East : The most important country of destination is Italy (49.0%), followed by Germany (24.4%) (mainly Nordrhein-Westfalen 8.1% and B/L 13.5%). Italy is also the most important country of origin (43.8%) followed by Germany (28.1%).

- North-East : Germany is the most important destination (53.2%) (mainly Rhein-Pfalz-Saar 17.4% and Baden-Württemberg 20.1%).
B/L represents 32.0% of all destinations.
Germany (53.3%) is also the most important origin (mainly Nordrhein-Westfalen 20.1% and Rhein-Pfalz-Saar 20.8%).
B/L and the Netherlands represent respectively 24.8% and 17.5%.

Germany

- Norddeutsche Küstenländer : The most important destinations are the Netherlands (44.0%), B/L (16.6%) and Denmark (15.5%).
The Netherlands (46.2%) are the most important origin.
- Nordrhein-Westfalen : The Netherlands (54.8%) and B/L (26.5%) are the most important destinations.
76.2% of inward flows come from the Netherlands (59.1% from Rotterdam).
- Hessen : B/L (30.4%) and the Netherlands (28.9%) are important destinations. In the other direction the Netherlands (40.7%) and France (31.7%) are the most important regions.
- Rhein-Pfalz-Saar : France (37.5%) is the most important destination (mainly the North-East region).
Also important are the Netherlands (34.1%) and B/L (20.0%).
France (41.1%) is also the most important origin (mainly the North-East region with 32.8%).
The Netherlands and B/L represent 34.1% and 21.0%.
- Baden-Württemberg : The Netherlands (36.9%), France (27.5%) and Italy (21.0%) are the most important destinations.
In France it is mainly the North-Eastern region that is important (18.4%).
In the other direction France (41.8%) is very important (mainly the North-West region with 36.1%).
Also important are the Netherlands (36.0%); and B/L (13.3%).
- Bayern : The most important destination is Italy (55.8%) followed by France (15.84%). The Netherlands (36.1%) is the most important country of origin.
France and B/L account respectively for 17.8% and 13.8%.
- West-Berlin : B/L (26.0%) and the Netherlands (26.3%) are of about equal importance as destinations.
Also important are Italy (20.9%), France (17.7%) and Denmark (10%).
Important origins are the Netherlands (46.2%), B/L (17.2%), Italy (15.9%) and France (14.0%).

Table 6.1.: Relative importance of different destinations

----	TO	Ireland	Denmark	B/L	Netherlands	Rotterdam	Rest	Italy	UK	France	North-West
	Ireland										
	Denmark										
	B/L			28.7	30.6			5.6	86.4	6.5	
	Netherlands			8.4	7.2			3.1	3.8	32.6	19.6
	Italy			35.5	23.1					6.1	
	UK			49.5	11.4					35.5	
	France: -North-West	8.8	6.8	30.3	14.6			13.5	4.2	14.4	
	-Paris region			20.3	9.3			28.6			
	-South-West			23.2	12.4			34.9	10.1		
	-Center							42.4	4.5		
	-South-East			32.0	6.3			7.5			
	-North-East										
	Germany: -Norddeutsche		15.5	16.6	44.0			8.7		12.8	
	-Küstenländer										
	-Nordrhein-										
	Westfalen			26.5	54.8					13.4	
	-Hessen			30.4	28.9			17.0		18.1	
	-Rhein-Pfalz-										
	Saar			20.0	34.1			6.6		37.5	
	-Baden-										
	Württemberg			12.1	36.5			21.0		27.5	
	-Bayern							55.8		15.8	
	-West-Berlin		10.0	26.0	26.3			20.9		17.7	

Table 6.1. (continued)

----- TO	Paris region	South East	North East	Germany	N.D. K�stenl�nder	Nordrhein Westfalen	Hessen	Rhein Pfalz Saar	Baden-W�rttember	Bayern
Ireland	4.0			4.3						
Denmark				71.6	56.1	6.6		5.2		
B/L			6.6	29.8		15.4		4.7		
Netherlands				61.7	4.4	42.8			5.2	
Italy	8.0	14.5	4.5	45.0	5.4	9.5	4.0		9.2	12.7
UK	6.7			8.7						
France: -North-West				20.6		8.5		5.4		
-Paris region				22.1		7.4		5.1		
-South-West				23.5						
-Center				16.8		4.4		4.4	4.2	
-South-East				24.2		8.1		4.2	4.1	
-North-East				53.2		5.3	5.8	17.4	20.1	
Germany: -Norddeutsche K�stenl�nder										
-Nordrhein-Westfalen			7.6							
-Hessen			5.9							
-Rhein-Pfalz-Saar			27.2							
-Baden-W�rttemberg			18.4							
-Bayern			4.9							
-West-Berlin			5.7							

Table 6.2.: Relative importance of different origins

FROM	Ireland	Denmark	B/L	Netherlands	Rotterdam	Rest	Italy	UK	France	North-West
Ireland								88.3	6.6	
Denmark								15.3	9.7	
B/L			30.5	44.8					25.4	8.5
Netherlands			9.3	6.5					7.4	
Italy	7.0	6.8	25.6	28.0			4.7		43.9	7.9
UK			72.6				10.5		17.6	5.7
France: -North-West			31.6	16.6			16.9			
-Paris region			30.7	14.8			21.5			
-South-West			29.8	20.3			15.7			
-Center			15.9	10.0			43.8			
-South-East			24.8	17.5						
-North-East										
Germany: -Norddeutsche		20.0	14.1	46.2	18.9	27.4	6.9		11.5	
-Küstenländer										
-Nordrhein-										
-Westfalen			15.2	76.2	59.1	17.2			5.7	
-Hessen			17.2	40.7	15.5	17.2	8.6		31.7	
-Rhein-Pfalz-										
-Saar			21.0	34.1	25.6	8.5			41.1	4.3
-Baden-										
-Württemberg			13.3	36.0	25.4	10.2	7.8		41.8	36.1
-Bayern			13.8	36.1	18.5	17.6	30.0	1.2	17.8	
-West-Berlin		5.7	17.2	46.2	9.2	37.0	15.9		14.0	

Table 6.2. (continued)

FROM	Paris region	South West	South East	North East	Germany	N.D. Küstenländer	Nordrhein Westfalen	Rhein Pfalz Saar	Baden-Württemberg	Bayern
Ireland					5.1					
Denmark					71.4					
B/L				13.0	24.8	42.2	17.1			
Netherlands					58.0		16.2	6.9	4.1	
Italy	4.6	6.0	11.5	10.3	38.5		38.4		6.9	15.1
UK		4.0			10.4		6.8			
France: -North-West					12.5		6.1			
-Paris region					26.2		11.0			
-South-West					27.1		9.6	6.2		
-Center					30.5		11.8	6.6	4.0	
-South-East					28.1		8.9	6.5	4.4	
-North-East					53.3		20.1	20.8	7.8	
Germany: -Norddeutsche Küstenländer				6.2						
-Ndrhein-Westfalen										
-Hessen				26.0						
-Rhein-Pfalz-Saar				32.8						
-Baden-Württemberg										
-Bayern				10.5						
-West-Berlin				4.7						

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