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OBSERVATION OF TRANSPORT MARKETS

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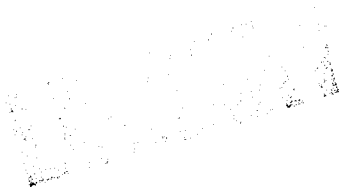


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PRESENTATION OF THE 1983 ANNUAL REPORT

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.

They all relate to the intra-community international transport of goods between Member States.

* * *

The contents of this Annual Report are as follows :

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CHAPTER 1

GENERAL MARKET ASSESSMENT AND PROSPECTS - ALL MODES

1.1. General market assessment

The continuous decline of total tonnage since 1979 was finally halted in 1983 when the general increase in economic activity led to a sharp rebound in tonnage moved internationally within the Community, especially in the second half of the year. Earlier estimates for 1983 have had to be revised upwards, and the total tonnage is now considered to have been 426 million tonnes, an increase of 3.6% (on 1982), although this figure must still be regarded as provisional.

All modes benefited from the improved economic situation especially rail and inland waterways which were worst hit during the economic downturn.

Road recorded the largest growth (+ 5.7%) but the smallest differential growth with total transport since 1979 (only + 2.1%).

Inland waterways recorded the first positive growth for four years (+ 3.4%) with traffic returning to 1981 levels.

Provisional rail figures show that the rapid decline since 1979 was almost halted.

Table 1.1. Annual EUR-10 tonnage flows by mode of transport
(Mio. T.)

Year Mode	1980	1981	1982	1983 (provisional)
Road	168.1	169.7	174.7	184.7
Rail	78.6	70.2	61.3	60.4
I.W.	190.5	183.6	176.9	182.9
Total	437.2	423.5	412.9	428.0

Table 1.2. Annual growth rates - EUR-10 tonnage flows (%)

Year Mode	1980/1979	1981/1980	1982/1981	1983/1982 (provisional)
Road	+ 3.3	+ 0.9	+ 2.9	+ 5.7
Rail	- 5.7	-10.7	-12.7	- 1.4
I.W.	- 2.0	- 3.6	- 3.6	+ 3.4
Total	- 0.7	- 3.1	- 2.5	+ 3.5

Table 1.3. Differential growth rates
(Modal growth rate - Total growth rate)

Year Mode	1980/1979	1981/1980	1982/1981	1983/1982 (provisional)
Road	+ 4.0	+ 4.0	+ 5.4	+ 2.2
Rail	- 5.0	- 7.6	-10.2	- 4.9
I.W.	- 1.3	- 0.5	- 1.1	- 0.1

Note:the figures in the above tables for the earlier years are slightly different from those published in earlier Annual Reports due to the extension of coverage from "EUR-7" to "EUR-10" and minor amendments in the data sources used.

1.2. Modal split

Table 1.4., which gives the annual modal split development since 1979, shows the increasing market share of road, mostly at the expense of rail.

Table 1.4. Modal split evolution (EUR-10)

Year	Road	Rail	I.W.	Total
1980	38.4	18.0	43.6	100
1981	40.1	16.6	43.3	100
1982	42.3	14.9	42.8	100
1983 (provi- sional)	43.2	14.1	42.7	100

1.3. Forecasts for 1984 (EUR-10)

Forecasts for the three modes of transport for 1984 have been presented already in the report "Analysis and Forecasts 1984" earlier this year. Since no revision of the growth rates have taken place, a summary of the key-figures is given below.

Year Mode	Tonnage (Mio T.)		grow rate in %
	1983	1984	
Road	184.7	196.8	+ 6.5
Rail	60.4	60.5	+ 0.1
I.W.	182.9	187.8	+ 2.6
Total	428.0	444.9	+ 4.0

CHAPTER 2

ROAD

2.1. Market

2.1.1. Introduction

International road transport between the Member States grew strongly in 1983 especially in the second half. For 1983 as a whole the increase is provisionally estimated to have been 5.7%; this was easily the best performance since 1979. The proportion of intra-Community traffic carried by road continued to increase, but by a rather smaller amount (0.8%) than had been observed in recent years (1.6%, 81/80; 2.3%, 82/81) due to an even greater resurgence of rail and inland waterways which are more tied to heavy industry.

The more rapid growth in road traffic to and from the peripheral Member States has been maintained in 1983, but the difference has not been so marked.

2.1.2. Analysis by country of haulier

German hauliers

1983 was a slightly disappointing year for German hauliers. Despite the growth in German traffic (+ 6.5% inwards, + 3.5% outwards), German hauliers only recorded a small increase (+ 2.8% inwards, + 1.5% outwards) and thus saw their share fall by around 1% in both directions; this was a reversal of the trend of recent years.

This rather weak performance was observed on virtually all traffic relations and in both directions.

The cause of this weak performance on the international market may well have been due to the strength of the more profitable German domestic market for long distance road transport which grew by 6% in 1983 after having fallen marginally for the previous two years.

French hauliers

1983 was a better year for French hauliers. Inward French traffic grew by 5% and outward French traffic by 10% which was above the Community average. Further the French hauliers maintained their share of these rapidly increasing markets in contrast to their poor performance the previous year. Combining these results together, the tonnage moved by French hauliers returned to the 1981 levels.

French hauliers did particularly well in traffic to Germany where in a rapidly expanding market (up 16%), the tonnage moved by French hauliers rose by 24%. Tonnage moved by French hauliers also increased by 18% both for traffic to the Netherlands and from Italy.

Italian hauliers

According to provisional Italian foreign trade data, Italian exports by road to the rest of the EEC grew by 10% while imports grew by 19%. In the case of imports, Italian hauliers increased their share slightly so that tonnage was up 22%. In the case of exports, Italian hauliers share fell from 60% to 56% so that the tonnage carried actually only rose by 4%.

On the import side, Italian hauliers tonnages increased by the more than 25% in traffic from France, the Netherlands and the U.K.; however, in the case of Germany and Belgium/Luxembourg the increase was only 5%. In the German market, which is the most important, other hauliers increased their tonnage by 10%, so that the Italian share actually fell.

On the export side, tonnages moved by Italian hauliers rose to Germany (+ 10%) and Belgium/Luxembourg (+ 5%) but fell to France (- 5%) and the Netherlands (- 8%). On the important German market, other hauliers increased their tonnages by 23%, so again the Italian share fell.

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 1983. NIWO(1) reports an increase of 4.9% for professional Dutch hauliers on bilateral relations (excluding Belgium/Luxembourg) which is close to the Community increase of 5.7%. Data covering all Dutch hauliers from the Centraal Bureau de Statistiek (CBS) has to be treated with some caution because of the high proportion "nationality unknown" (over 50% in the case of outward Dutch traffic) and the fact that only the first 9 months data of 1983 is available.

On the important German market, the Dutch, who already hold almost three quarters of the market, increased their share by a further 0.5% according to German results and the actual tonnage by about 6%. This agrees closely with the NIWO figure of + 4.8% for professional hauliers.

On the French market, the Dutch and French results are inconsistent. The French results show no appreciable change in share in a market increasing by 7% while the NIWO results show no change in the Dutch tonnage.

On the Italian market, the NIWO results show an increase for Dutch professional hauliers of 13% in both directions.

(1) NIWO : Nederlandsche Internationale Wegvervoer Organisatie, Annual Report 1983.

Belgian and Luxembourg hauliers

Data for Belgian and Luxembourg hauliers is only available from German, French and Italian sources for the relations concerned; only in the case of the German source is it possible to treat Belgian and Luxembourg hauliers separately.

On the German market, which grew by about 8%, Belgian hauliers increased their share by about 1.3% and Luxembourg hauliers managed to increase their share by about 6%.

On the French market, which rose by about 4%, Belgian and Luxembourg hauliers maintained their share of traffic to France but increased their share in the reverse direction by 3%;

On the Italian market, Belgian and Luxembourg hauliers increased their tonnage by 12% whereas the overall market only grew by 9%.

From this information, it appears that 1983 was a better year than 1982 for Belgian and Luxembourg hauliers.

United Kingdom hauliers

According to the provisional results from the 1983 Statistical Directive, tonnages moved by UK hauliers rose sharply, 10% inwards and as high as 13.5% outwards. Exceptionally large increases were noted in UK haulier traffic to Germany (+ 18%), Italy (+ 39%) and Ireland (+ 20%) and from Germany (+ 15%), Italy (+ 37%) and Ireland (+ 15%).

It is not yet possible to check the UK share of the tonnages with partner Member States because of a lack of comparable sources. However the Roads Goods Vehicle survey on Ro-Ro ferries does provide complementary information on vehicle movements. The total number of vehicle movements rose by 7.5% in 1983 and this was split into:

UK registered powered vehicles:	+ 3%
Foreign registered powered vehicles:	+ 15%
Unaccompanied semi-trailers:	+ 6%
(nationality unknown)	

From these results it appears that the UK hauliers share of tonnage actually fell despite the large absolute increases in tonnage noted above.

Irish hauliers

Information from Irish sources on total outward Ro-Ro traffic (i.e. excluding traffic with Northern Ireland) and also excluding company owned trailer traffic, shows an overall improvement of about 10%.

On the main relation with the UK, a decrease of 3% was offset by increases in continental traffic, mainly exports to France (+ 28%), Benelux (+ 25%), Italy (+ 32%) and Germany (+ 13%). Among continental destinations, only the traffic of minor tonnage to Denmark decreased (- 24%).

As a result, the importance of UK as a destination for Irish traffic declined from 51% to 45% of the total for all destinations.

The above comments relate to all hauliers, but as the Irish hauliers have about 80% of the market, the trends for Irish hauliers must be similar.

DK hauliers

Information from Danish foreign trade sources shows an overall increase of road traffic of 11% in 1983.

Except for the main relation with Germany (which represented about 60% of total intra-community Danish transport), imports increased more than exports.

It appeared that Danish hauliers lost 1% market share on inward traffic from Germany and slightly increased their share (+ 0.3%) on the other directions.

They increased their share by about 8% on inward traffic from France while they maintained their share at the same level in the other direction where total tonnage carried decreased marginally.

Greek hauliers

In 1983, according to Greek sources, intra-community traffic involving Greece rose by 7% compared with 1982.

Inward traffic went up by 9%, with an above average increase for the traffic from NL, B/L and I (respectively + 25%, + 19% and + 12%).

Outward traffic was also up but to a lower extent (+ 5%).

The main increases were noted in the traffic to I and B/L (+ 21% and + 18%). This compensated the drop in the tonnages carried to France (- 8%).

The German market, which accounts for about 54% of Greek intra-community traffic, increased by about 4%.

From German sources, it may be deduced that the Greek share went up by about 2% in both directions.

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

2.2.1. The data currently available for 1983 are taken from many different sources and do not permit a detailed structural analysis to be carried out with sufficient consistency and reliability.

The most extensive comparable data currently available relate to those collected for the Road Statistical Directive for 1981 and 1982.

Note that: a) bilateral traffic is covered by the Directive but that cross-trade traffic is not (= traffic by haulier from Member State A between Member State B and Member State C)

b) tonnages for Italian hauliers relate to foreign trade statistics; the tonne-kilometres have been estimated assuming that the average distance to each Member State is the same as that of the hauliers from the partner country.

Table 2.1. Shares of the market held by hauliers from EUR-10 on intra EUR-10 journeys.

Country of haulier	Market share (in %) of total EUR-10 tonnage		Tonnage change in %
	1981	1982	1982/1981
D	21.8	22.6	+6.6
F	16.9	15.1	-8.3
I	8.7	8.4	-0.5
NL	26.4	27.4	+7.1
B	18.3	18.5	+4.3
L	1.4	1.4	+2.4
UK	2.3	2.3	+1.6
IRL	0.6	0.7	+16.8
DK	3.1	3.0	+0.6
GR	0.5	0.6	+31.3
Total EUR-10	100	100	+3.0%

Table 2.1. shows the increasing dominance of Dutch hauliers, positive trends for German and Belgian hauliers and the decrease of the French hauliers share.

On relations of minor tonnage, the table indicates an important increase for Greek and Irish hauliers.

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.

Table 2.2. 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		Inw. + Outw. traffic	
	1981	1982	1981	1982	1981	1982
D	39	42	43	44	41	43
F	42	40	45	39	44	39
I	43	42	57	56	51	50
NL	66	68	73	73	69	71
B	43	44	51	50	47	48
L	53	49	39	36	45	42
UK	42	41	60	54	49	46
IRL	69	80	84	88	76	83
DK	63	60	80	75	73	68
GR	55	66	79	79	66	72
Total EUR-10	47	48	53	52	50	50 by definition

The results clearly confirm 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, GR and DK) with 83%, 72% and 68% respectively (in 1982). UK hauliers also handle just under 50% of traffic whith UK (1)
The drop of the French hauliers market share was very significant.

(1) The figures for the UK are particularly sensitive to the problem of unaccompanied semi-trailers which are not recorded in the road Directive statistics and should consequently be treated with some reserve.

Table 2.3 Percentage share of traffic (in tonnes) held by hauliers from "origin" Member States (1) (2).

To	Year	D	F	I	NL	B	L	UK	IRL	DK	GR	Total
From												EUR-10 (81-82)
D	80	-	51	-	31	54	56	23	25	34	-	43
	81	-	54	50	32	52	46	26	55	36	18	
	82	-	61	55	29	54	52	34	50	41	14	
F	80	42	-	-	35	47	40	52	0	35	-	45
	81	44	-	60	33	42	42	55	0	21	64	
	82	37	-	58	25	35	52	58	6	25	53	
I	80	-	-	-	-	-	-	-	-	-	-	57
	81	60	54	-	48	49	49	71	44	74	17	
	82	56	57	-	47	49	49	73	47	44	63	
NL	80	76	67	-	-	78	64	35	27	62	-	73
	81	75	70	58	-	75	71	41	4	60	30	
	82	74	68	62	-	78	78	43	8	61	17	
B	80	57	57	-	36	-	50	18	18	23	-	51
	81	59	60	66	36	-	46	15	0	17	0	
	82	57	62	65	34	-	47	7	0	21	0	
L	80	23	17	-	56	60	-	0	0	-	-	39
	81	26	36	-	66	57	-	0	0	-	-	
	82	28	23	-	59	62	-	0	0	-	-	
UK	80	85	56	-	79	91	100	-	29	5	-	60
	81	83	61	56	76	91	100	-	29	7	57	
	82	79	58	56	65	94	100	-	17	4	44	
IRL	80	90	100	-	100	100	-	92	-	0	-	84
	81	85	85	44	88	100	-	86	-	0	-	
	82	71	94	57	100	100	-	89	-	0	-	
DK	80	83	81	-	41	75	75	99	100	-	-	80
	81	81	79	69	41	77	77	99	100	-	77	
	82	75	82	73	33	77	77	99	100	-	70	
GR	80	-	-	-	-	-	-	-	-	-	-	79
	81	84	69	73	77	100	100	81	-	33	-	
	82	89	62	60	85	100	100	87	-	38	-	
EUR-10	80	-	-	-	-	-	-	-	-	-	-	53
	81	61	58	57	34	57	47	58	31	37	45	
EUR-10	82	58	61	58	32	56	51	59	20	40	34	52

(1) Italian, Danish and Greek data give no breakdown between Belgium and Luxembourg; in compiling the marginal EUR-10 totals, the traffic for these three Member States is assumed to be with Belgium.

(2) For UK data - see note (1) on previous page.

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 63% of the traffic from F to D and 42% of the EUR-10 traffic to D (in 1982).

The main variations are the drops registered by F- and UK-hauliers. The market shares of other hauliers on the large flows remained quite unchanged.

2.2.3. Outward/Inward tonnage ratios by country of haulier

Table 2.4.

Nationality of haulier	Ratios Outward/Inward	
	1981	1982
D	0.90	0.95
F	1.05	0.90
I	1.62	1.66
NL	1.10	1.00
B	1.49	1.48
L	0.97	0.91
UK	0.90	0.88
IRL	1.03	0.76
DK	1.72	1.58
GR	1.16	1.01
EUR-10	1.15	1.10

In 1982, the Outw./Inw. ratios for the following countries were in balance: NL, GR, D, L and F.

A significant excess of the exports could be noted for I, DK and B.

Compared with 1981, the main changes of the Outw./Inw. ratios were as follows :

Country	Change 82-81	Explanation
IRL	-27	increase of inwards
F	-15	decrease of outwards
GR	-15	increase of inwards
DK	-14	increase of inwards
NL	-10	increase of inwards

2.2.4. Tonnes-kilometres achieved by country of haulier

Table 2.5.

Country of haulier	1981 EUR-10		1982 EUR-10	
	T-km	%	T-km	%
D	14 077	19.7	15 628	21.0
F	14 065	19.7	12 761	17.1
I	14 000	19.6	14 037	18.9
NL	12 651	17.7	14 205	19.1
B	7 906	11.0	8 649	11.6
L	667	0.9	899	1.2
UK	2 679	3.7	2 517	3.4
IRL	373	0.5	417	0.6
DK	3 410	4.8	3 021	4.0
GR	1 741	2.4	2 307	3.1
Total	71 569	100	74 441	100

The changes 1982 on 1981 in market shares expressed in t-km are mostly similar to those expressed in tonnes (table 2.1.). The dominance of NL and B hauliers, evident when expressed in tonnes, decreases when t-km are considered. The share of F, UK and DK hauliers and even more of I and GR-hauliers increases significantly if measured in t-km as opposed to tonnes.

2.2.5. Shares of market on a relation basis (in tonnes-kilometres)

The analysis carried out in section 2.2.2. can also be repeated in tonnes-kilometres. Table 2.6. corresponds to table 2.2.

Table 2.6. Percentage share of inward and outward traffic (in t-km) held by hauliers from Member State concerned (Year 1982).

Journeys to and from	Inward traffic 1982	Outward traffic 1982	Inw. + Outw. traffic 1982
D	39	45	42
F	39	48	43
I	42	56	50
NL	67	72	70
B	45	53	50
L	61	64	63
UK	34	58	42
IRL	62	80	69
DK	58	67	62
GR	69	80	74
Total EUR-10	45	55	50 by definition

French and Luxemburger hauliers have a larger share of traffic from their respective countries when traffic is measured in t-km as opposed to tonnes; DK and IRL hauliers have smaller shares when measured in t-km.

2.2.6 Shares of the road haulage market held by own account operators

The results from the Road Statistical Directive for 1981 and 1982 also give a breakdown between "hire and reward" and "own-account" operators.

Table 2.7. gives the share, in tonnes, for own-account hauliers.

The Italian foreign trade data does not contain a breakdown by hire and reward/own-account so that traffic to and from Italy has been totally excluded from Table 2.7.

Table 2.7. Share of market held by own-account operators on intra-community journeys.

Country of haulier	% Share of market in tonnes	
	1981	1982
D	20.8	20.5
F	23.6	23.6
NL	21.2	20.7
B	26.9	27.3
L	35.2	31.5
UK	18.2	16.7
IRL	36.3	32.8
DK	13.0	11.8
GR	negl.	negl.
Average	22.9	22.6

While the EUR-10 average decreased marginally, larger falls in the proportion of own account can be noted for L, UK, IRL and DK-hauliers.

2.2.7. Spain and Portugal

Statistics on bilateral intra-community transport analysed in the former sections, relate to EUR-10 hauliers, excluding "third countries". It can be interesting to give an overview about the tonnages carried bilaterally by EUR-10 hauliers to and from Spain and Portugal; data on tonnages transported by Spanish and Portuguese hauliers to and from the EEC are not yet available.

Table 2.8. Year 1982: tonnages carried by EUR-10 hauliers to and from Spain and Portugal (000' tonnes).

Country of haulier	SPAIN			
	To Spain	From Spain	Total	%
D	277	327	604	21
F	769	522	1,291	45
I	210	121	331	12
NL	63	57	120	4
B	172	169	341	12
L	-	-	-	-
UK	50	54	104	4
IRL	-	-	-	-
DK	24	24	48	2
GR	1	0	1	0
EUR-10	1,566	1,274	2,840	100

Country of haulier	PORTUGAL			
	To Port.	From Port.	Total	%
D	38	16	54	17
F	140	86	226	70
I	-	-	-	-
NL	16	11	27	8
B	0	0	0	0
L	-	-	-	-
UK	5	5	10	3
IRL	-	-	-	-
DK	3	2	5	2
GR	0	0	0	0
EUR-10	202	120	322	100

2.3. Cross-Trades

2.3.1. As was mentioned in section 2.2.1. the data collected in the Road Statistical Directive does not cover cross-trades, that is traffic by haulier from Member State A between Member State B and Member State C. Partial information is however available and this will be examined below.

2.3.2. Cross-trades across the German border

The German authorities publish annually (1) details of the movements of hauliers of all nationalities crossing the German border, this is derived from the tally-card completed at the frontier (the "Zahlkarte"). Table 2.9. shows the principal EEC Cross-Traders for outbound traffic from Germany to each other Member State for 1982 and 1983. The German source gives, German hauliers, partner Member State hauliers and the 3 largest Cross-Traders and "others", which may include non-EEC hauliers, so it is not possible to extract the total of EEC Cross-Traders. However it is only on the relations D - I and D - GR where non-EEC hauliers have a substantial share of the market; in the former case the Austrians and Swiss hauliers and in the latter case the Austrians and Yugoslavians have substantial shares due to their geographical situation as a transit country for the traffic concerned.

Table 2.10. is similar to 2.9. except that it concerns inbound traffic to Germany.

(1) KBA/BAG Statistische Mitteilungen, May 1983 and May 1984, Table G.-j 14.

Table 2.9.

Outward Cross-Traders across the German Border '000's tonnes

Relation	Year	D	Partn Member State	Hauliers from			Others (incl. non-EEC)	All Cross- Traders	Total	% cr. tr.
				Principal EEC Cross- Traders						
D → F	1982	5020	3751	B	NL	L	10	345	9116	3.8
	1983	4850	3697	195	118	22				
D → I	1982	2522	2073	NL			818	832	5427	15.3
	1983	2546	2266	14						
D → NL	1982	4688	11177	B	F	DK	6	84	15949	0.5
	1983	4856	11713	66	10	2				
D → B	1982	3644	3609	NL	L	F	7	689	7942	8.7
	1983	3817	3852	652	23	7				
D → L	1982	423	431	B	NL	F	1	14	868	1.6
	1983	371	527	4	5	4				
D → UK	1982	187	380	NL	B	DK	15	459	1026	44.7
	1983	223	339	382	55	7				
D → IRL	1982	10	17	NL	UK	B	0	14	41	34
	1983	11	18	12	1	1				
D → DK	1982	753	1147	NL	F		2	14	1914	0.7
	1983	825	1201	11	1					
D → GR	1982	43	233				29	29	305	9.5
	1983	39	239							
D → EUR-10	1982	17290	22818	NL*	B*	L*	920	2480	42588	5.8
	1983	17538	23852	1194	321	45				
				1285	358	58	987	2688	44078	6.1

NL*,B*,L*: Only those relations where Member State concerned was one of the three largest cross-traders in given year.

Table 2.10.

Inward Cross-Traders across the German Border '000's tonnes

Relation	Year	D	Partn Member State	Hauliers from			Others (incl. non-EEC)	All Cross- Traders	Total	‰ cr. tr.		
				Principal EEC Cross- Traders								
F → D	1982	6902	4694	B	NL	L	17	309	11905	2.6		
	1983	6708	4856	172	119	19	16	412	11976	3.4		
I → D	1982	2679	1693	NL			1052	1119	5491	20.4		
	1983	2952	1986	67			1117	1200	6138	19.6		
NL → D	1982	3857	10514	B	F	DK	UK	L	10	74	14445	0.5
	1983	3922	11303	60			2	2	16	87	15312	0.6
B → D	1982	3166	3730	NL	L	F			8	824	7720	10.7
	1983	3400	4261	795	11	10			10	860	8521	10.1
L → D	1982	949	477	B	NL	I			2	12	1438	0.8
	1983	972	558	8	1	1			2	21	1551	1.4
UK → D	1982	95	303	NL	B	DK			5	224	622	36.0
	1983	134	313	187	29	3			6	274	721	38.0
IRL → D	1982	6	26	NL	UK	B			0	8	40	20
	1983	7	27	2	5	1			0	9	43	21
DK → D	1982	600	2137	NL	UK				3	32	2769	1.2
	1983	684	2486	28	1				5	31	3201	1.0
GR → D	1982	38	274						48	48	360	13.3
	1983	32	297						50	50	379	13.2
EUR-10 → D	1982	18292	23848	NL*	B*	L*			1149	2650	44790	5.9
	1983	18811	26087	1199	270	32			1260	2944	47842	6.2

NL*,B*,L*: Only those relations where Member State concerned was one of the three largest cross-traders in given year.

The results show that some 6% of the traffic crossing the German border is in the hands of cross-traders and that this rose by 0.3% in 1983.

If the data for the relations with Italy and Greece is excluded (since these are dominated by non-EEC cross-traders) the results relate almost entirely to EEC cross-traders; these are shown in Table 2.11 below.

Table 2.11

Relations	Year	Percentage of cross-traders from			
		NL*	B*	L*	Other (incl. non-EEC)
D → EUR 10 (except I and GR)	1982	73%	20%	3%	4%
	1983	72%	20%	3%	5%
EUR-10 → D (except I and GR)	1982	76%	18%	2%	4%
	1983	72%	20%	3%	5%

Again the footnote to table 2.9 should be noted, the shares of NL, B and L are only when that Member State is among the three principal cross-traders for any specific relation; however the small proportion of "others" indicates that the percentages for NL, B and L must be almost correct.

The results clearly show that the Benelux countries completely dominate the "cross-trading" across the German border, with Dutch hauliers having around 75% of the cross-trading market.

2.3.3. Cross-trades using Community Quota authorisations

Several years ago the use of Community Quota authorisations in cross-trades was a criteria in the allocation of licences. Although this criterion has since been abandoned, it is interesting to examine which Member States use their authorisations for cross-trades as opposed to bilateral movements. It should be noted that in this analysis each leg of the journey is considered separately - this contrasts with the (statistically speaking) very complex analysis that used to be carried out where multilateral journeys were identified which comprised the bilateral and cross-trade legs.

Table 2.12. shows the total tonnages and tonnages moved under Community Quota authorisations in 1982 (the 1983 data is not yet available).

Table 2.12

Use of Community Quota authorisations, 1982 (000's tonnes)

Member State of haulier	Tonnages moved			% of all cross- trade tonnages
	Total	cross-trades	%cross-trades	
D	1.846	62	3	4
F	931	130	14	7
I	884	4	0.5	0
NL	1.565	838	54	48
B	964	483	50	28
L	281	108	38	6
UK	469	56	12	3
IRL	81	18	21	1
DK	933	61	6	3
GR	18	0	0	0
ALL	7.972	1.759	22	100

The results, which are complementary to those in 2.3.2. above, show that about 50% of the tonnage carried by Dutch, Belgian and Luxemburg hauliers are on cross-trade movements while for the German, Italian and Greek hauliers the proportions are 3%, 0.5 and 0% respectively. Of the total tonnage moved in cross trades under Community Quota authorisations, the Dutch hauliers account for 48% and the Belgian hauliers (28%) for more than half of the remainder.

2.3.4. Cross-Trades by Dutch hauliers

NIWO (1) reports an increase of 8.9% in cross-trading tonnages by professional Dutch hauliers (excluding bilateral movements to Belgium/Luxembourg which are not collected by NIWO, but including movements with non-EEC countries).

(1) Stichting Nederlandsche Internationale Wegvervoer Organisatie:
1983 Yearbook, Table XIII.

2.4. Transport surveys

2.4.1. Introduction

The main purpose of transport surveys consists in finding out as rapidly as possible how road hauliers have seen the level of their intra-Community border-crossing freight transport during a particular quarter.

The survey provides also a set of economic indicators which reflect how a firm's situation is affected.

For the purposes of an annual report the available statistical information is more suitable than the qualitative opinion results of the surveys; this section will concentrate on the trends that appear from the 1983 quarterly surveys.

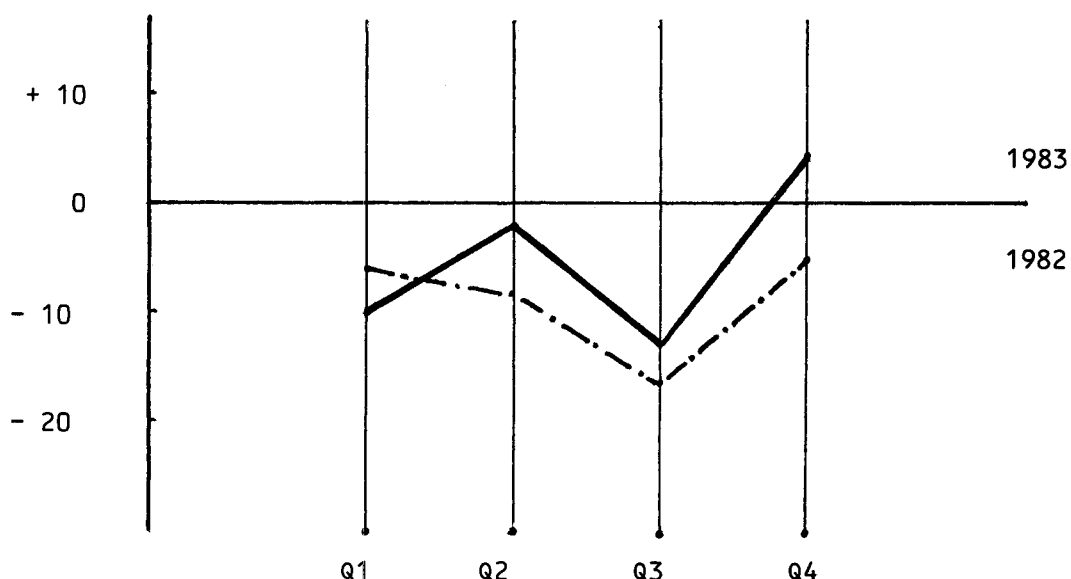
2.4.2. Transport activity

The situation on the market for the carriage of goods by road between Member States as seen by the hauliers replying to the questionnaire, developed more favourably in 1983, from the second quarter onwards (see figure 2.1.). During the first quarter of 1983 the market remained hesitant.

It should not be forgotten that the subjective nature of the basic data causes the results for international transport activity to be suitable for indicating, but certainly not for measuring the trend accurately.

For some countries the situation still remains rather weak, e.g. in France and to a smaller extent in Italy and Germany. In these countries the balance between expecting an improvement and those expecting a worsening of the situation remained negative.

Graph 2.1. Change in the level of firms' activity, expressed as an aggregate balance of opinion (percentage difference between numbers expressing opposite view).



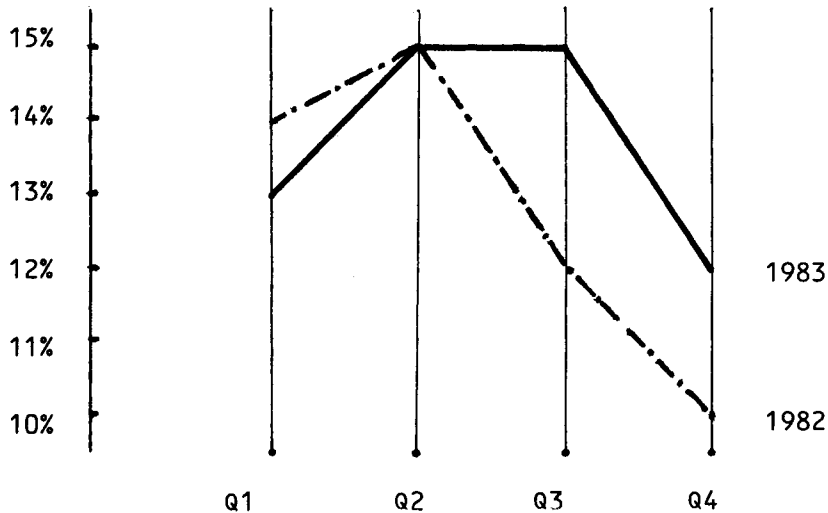
2.4.3. Analysis of economic indicators

At this point, a detailed analysis of the indicators which are more specifically economic in nature - recruitment of drivers, liquidity difficulties and investment is warranted.

2.4.4. Recruitment

The average percentage of firms declaring they had recruited drivers increased from 12.8% to 13.8% in 1983.

Graph 2.2. Percentage change in number of firms stating they had recruited drivers



A review of the quarterly data and comparison of these with the results for transport activity lead to the following conclusions :

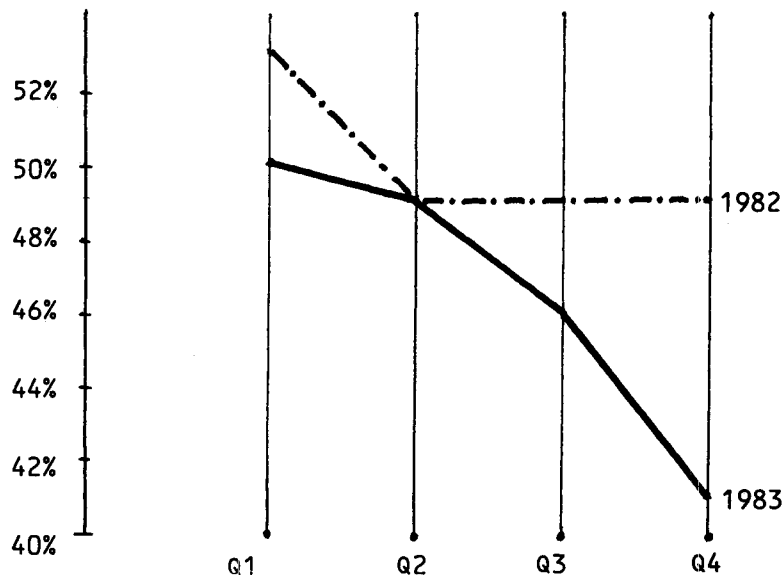
- i) in the third and fourth quarter of 1983, the recruitment level lies resp. 3% and 2% higher than the year before; since during those months activity has risen, one can assume that the recruitment of drivers took place with the intention of increasing the number of personnel and only to a smaller extent to replace drivers.
- ii) the figure announced for the first quarter of 1984 is 10% higher than the figure of the same quarter in the previous year and 8% higher than that of the last quarter 1983. This seems to express the belief of road hauliers in an economic upswing in the transport sector.

2.4.5. Liquidity

The number of firms indicating that they have to cope with liquidity problems remains stable at a high level.

As it can be seen, the average annual percentage of firms stating that they had liquidity problems was 47% in 1983 compared to 50% in 1982.

Graph 2.3. Percentage change in the number of firms stating they had liquidity problems



Liquidity problems are different from one Member State to another. Expressed as an average annual percentage, liquidity problems were encountered in 1983 by Italy and Greece (71%), France (62%), Ireland (50%) and the UK (44%).

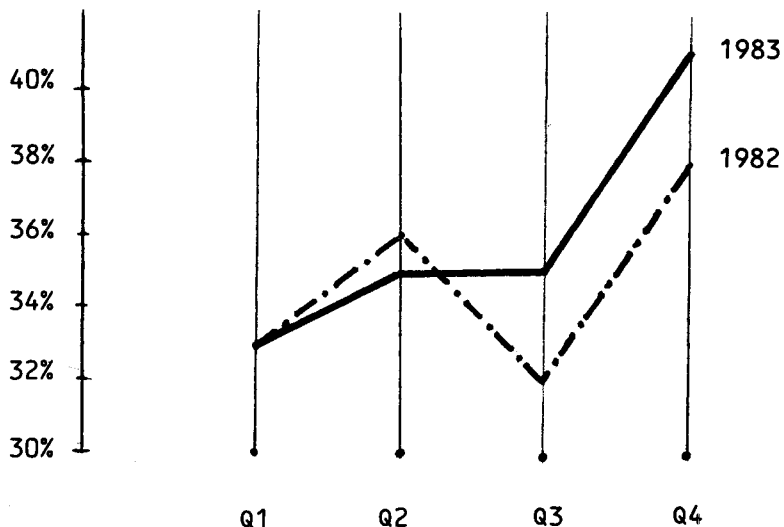
Liquidity problems were remarkably low in the Netherlands (7%). An intermediate position is taken by Germany (27%), Belgium (42%), Luxemburg (19%) and Denmark (16%).

2.4.6. Investment

Investment is an important indicator of the economic climate since it reflects the expectations of the hauliers concerning future capacity needs.

As such it is important to note that an improvement has taken place during the two last quarters of 1983 and the first quarter of 1984 (see graph 2.4.).

Graph 2.4. Percentage change in the number of firms stating they had invested.



However, it appears that in the case of France no improvement in investment has taken place during the year 1983. For the first quarter of 1984 there is a marginal increase.

A remarkable increase has taken place in Germany, Italy and Denmark.

2.5. Costs

In 1983, detailed data were gathered from 7 Member States, Greece, Ireland and Italy not yet being included. Fuel cost and total cost have been examined separately in the quarterly reports. Some more key cost categories are examined in 1983 annual report, such as wage, repairs, depreciation, taxes and interest.

The table below (table 2.13.) gives the percentage cost changes for the last years while the graphics figures (2.14. - 2.21) give the development of the same cost categories for a longer period.

Table 2.13.

	Inflation in NC	Wages in NC	Re- pairs in NC	Depre- ciation in NC	Taxes in NC	Inte- rests in NC	Fuel in NC	Total costs in NC	Total costs in ECU
D 1981	6.3	4.8	6.6	4.3	0.5	- 2.1	+15.6	5.7	11.6
1982	4.6	5.3	3.1	6.0	0.3	-13.7	- 0.9	2.4	9.0
1983	2.5	3.2	2.9	2.2	0.0	- 6.7	- 4.4	1.1	2.9
NL 1981	7.4	5.5	5.3	3.3	0.6	34.4	16.0	8.1	13.3
1982	4.2	5.5	5.4	4.6	0.0	-25.4	- 0.6	2.5	8.6
1983	2.9	0.6	3.0	2.1	0.8	- 4.0	- 1.7	0.7	0.5
B/ L 1981	8.2	8.5	5.1	15.3	0.0	15.5	26.7	12.6	12.2
1982	8.1	7.9	6.1	21.0	0.0	- 1.7	5.4	9.0	0.7
1983	7.1	4.7	4.3	9.3	0.5	- 1.7	8.6	6.1	1.9
F 1981	13.9	14.3	13.0	14.3	1.6	18.3	16.0	15.9	11.4
1982	9.7	15.3	14.2	9.3	3.6	5.4	17.2	13.8	8.5
1983	9.2	11.8	6.7	11.4	8.4	- 1.3	1.1	8.7	2.6
UK 1981	12.0	5.9	8.0	2.0	15.0	- 1.0	21.1	9.3	8.6
1982	5.4	6.6	7.4	5.9	21.7	- 2.0	11.5	8.4	7.1
1983	5.3	4.5	5.2	2.7	22.9	0.0	- 0.7	4.3	3.3
DK 1981	12.2	6.3	10.5	10.6	0.1	10.6	28.0	13.3	12.6
1982	9.0	10.3	12.7	10.3	3.9	3.3	18.0	11.6	10.2
1983	6.0	0.0	5.9	6.3	0.7	- 6.9	- 9.7	-0.8	-1.8

NC = National currency

2.5.1. Development of the different costs in national currency in 1983 by Member State

Germany

In 1983, interest costs, fuel costs, taxes, and depreciation were below the level of inflation. Wages and repairs costs were very close to the inflation increase. The increase in 1983 of the total cost was below the level of inflation.

Netherlands

Only the repair costs were higher than the increase of inflation. Total costs in national currencies have increased slightly and below the increase of inflation.

Belgium/Luxemburg

Depreciation costs and fuel costs were higher than the inflation rate in 1983. Total cost in national currency increased a little but less than inflation.

France

The increase of costs of wages and depreciation was higher than the inflation, while the costs of taxes and repairs were close to the inflation increase. Total costs in national currency have increased less than inflation.

United Kingdom

Taxes costs have increased very much in 1983 (22,9%). Repair and wages costs were very close to inflation. Total costs in national currency have increased less than inflation.

Denmark

The evolution in 1983 of each different cost was less than the inflation rate. Total costs in national currency actually decreased in 1983.

2.5.2. Development of total costs in ECU in 1983

Total costs in ECU in 1983 only decreased in Denmark. The biggest increase occurred in United Kingdom, but was only 3.3%. Compared with the previous years, 1983 was the year with the lowest increase in total costs since 1981 for all the Member States, except Belgium/Luxemburg.

Table 2.14

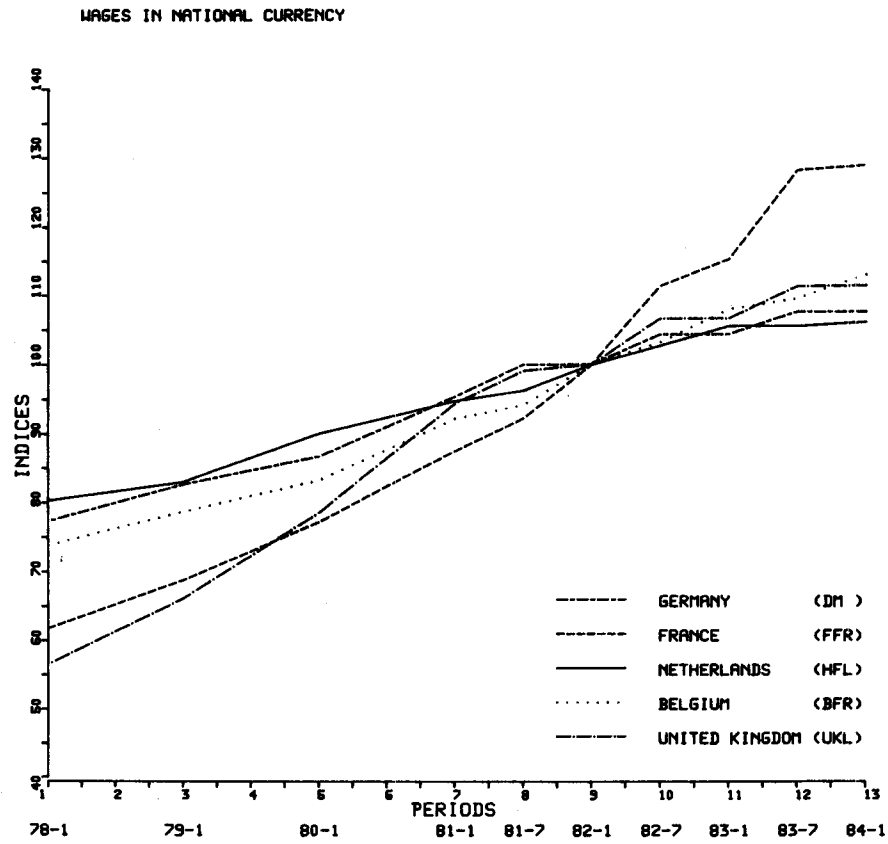


Table 2.15

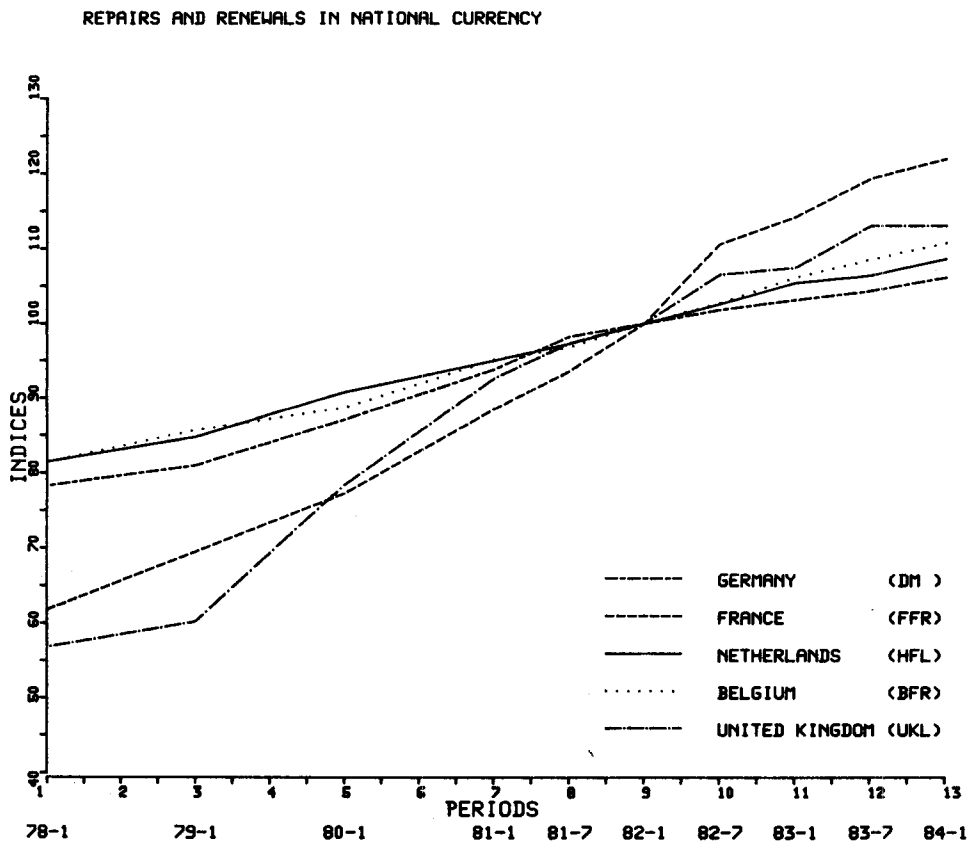


Table 2.16

DEPRECIATION IN NATIONAL CURRENCY

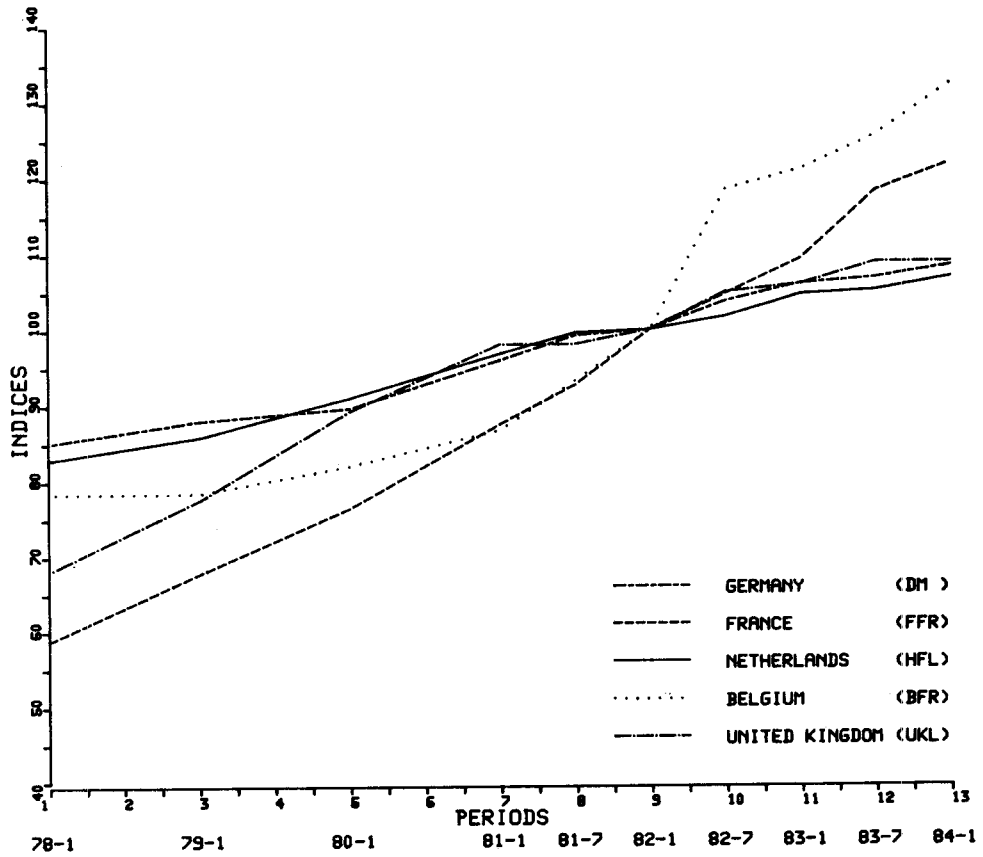


Table 2.17

TAXES AND CONTRIBUTIONS IN NATIONAL CURRENCY

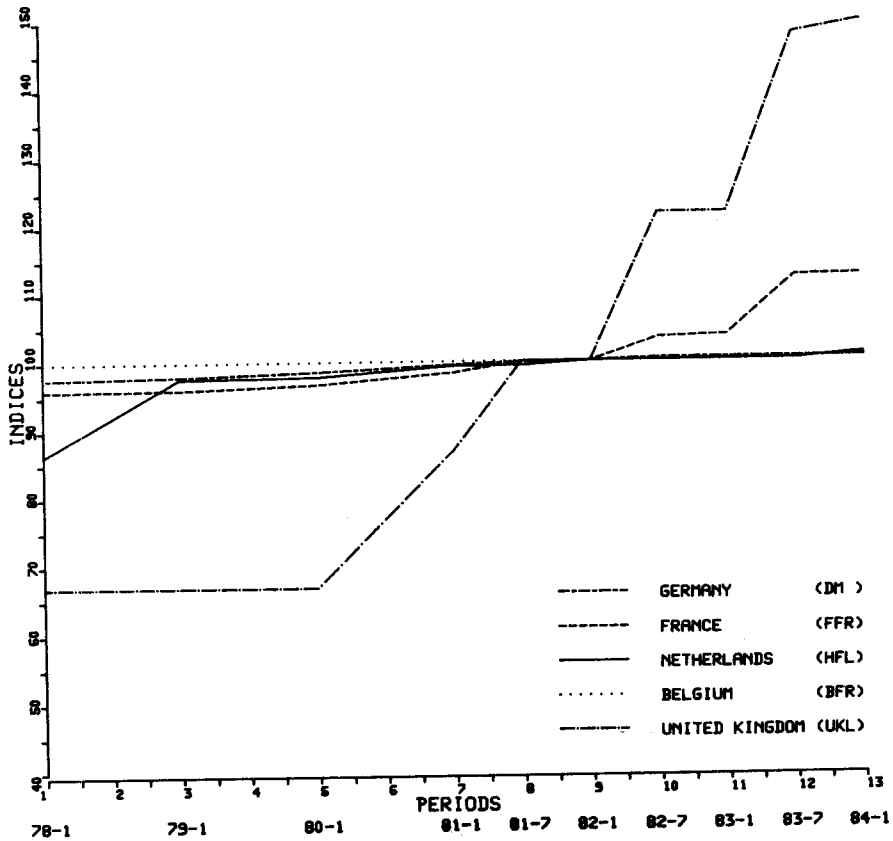


Table 2.18

INTEREST IN NATIONAL CURRENCY

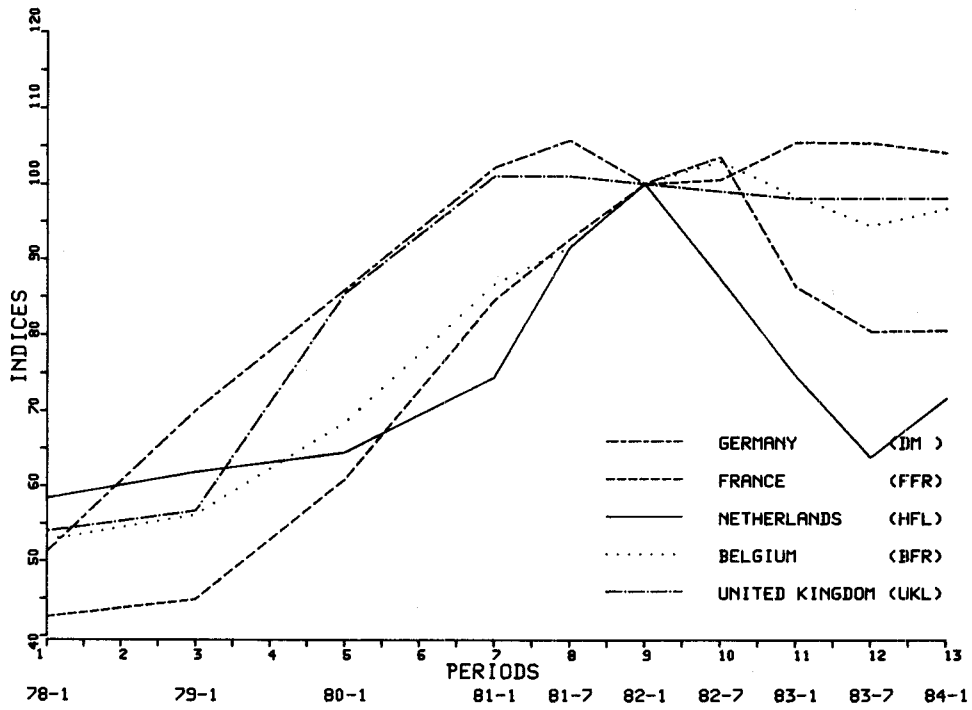


Table 2.19

FUEL COSTS IN NATIONAL CURRENCY

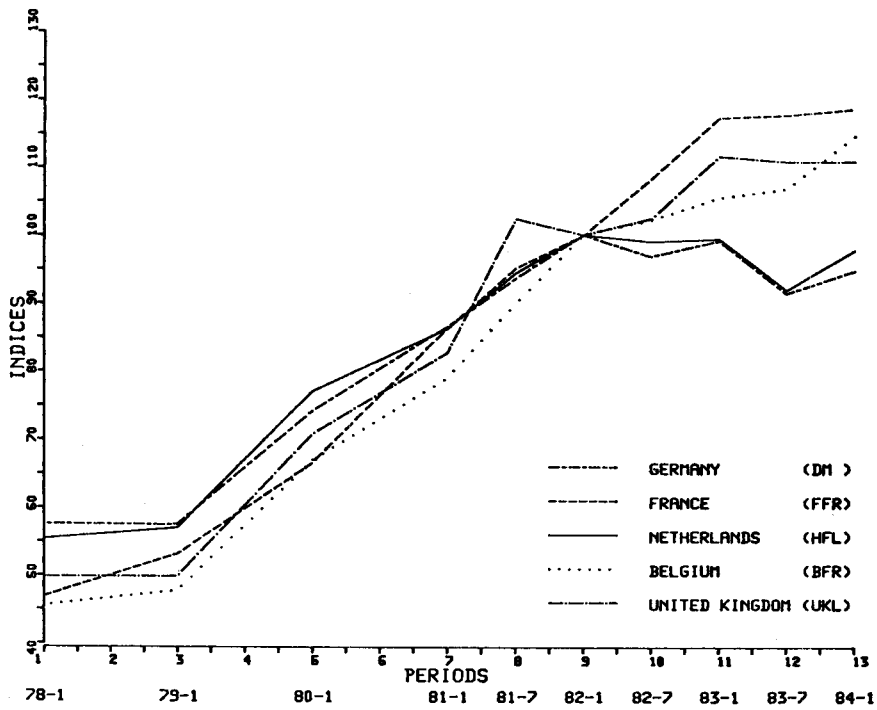


Table 2.20

TOTAL COSTS IN NATIONAL CURRENCY

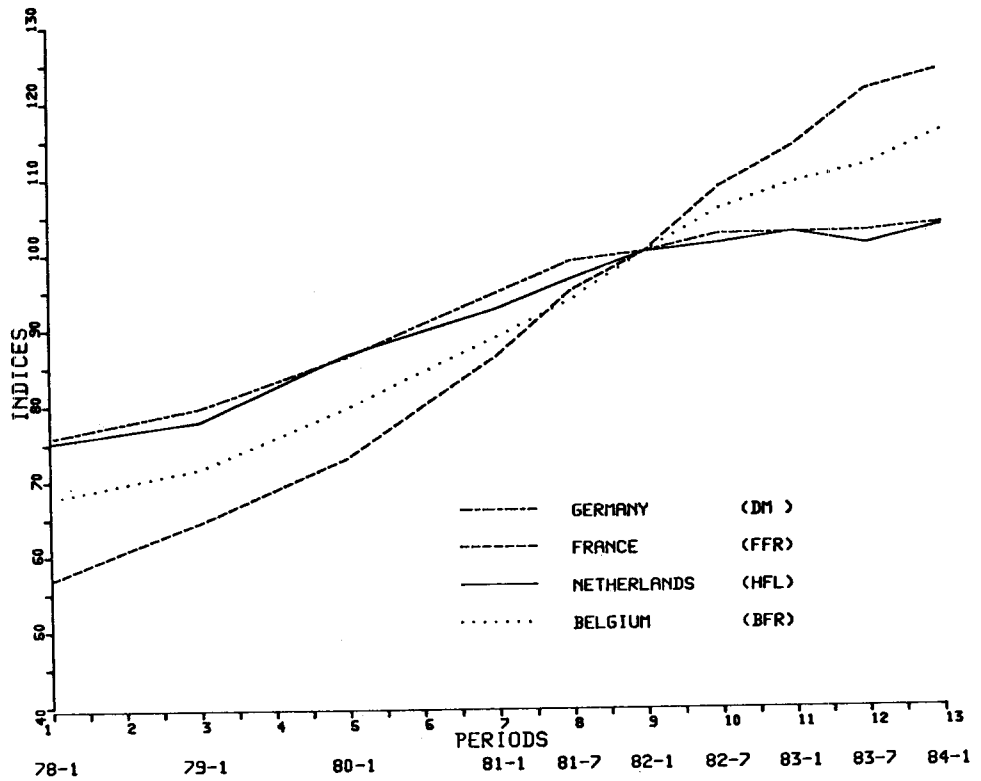
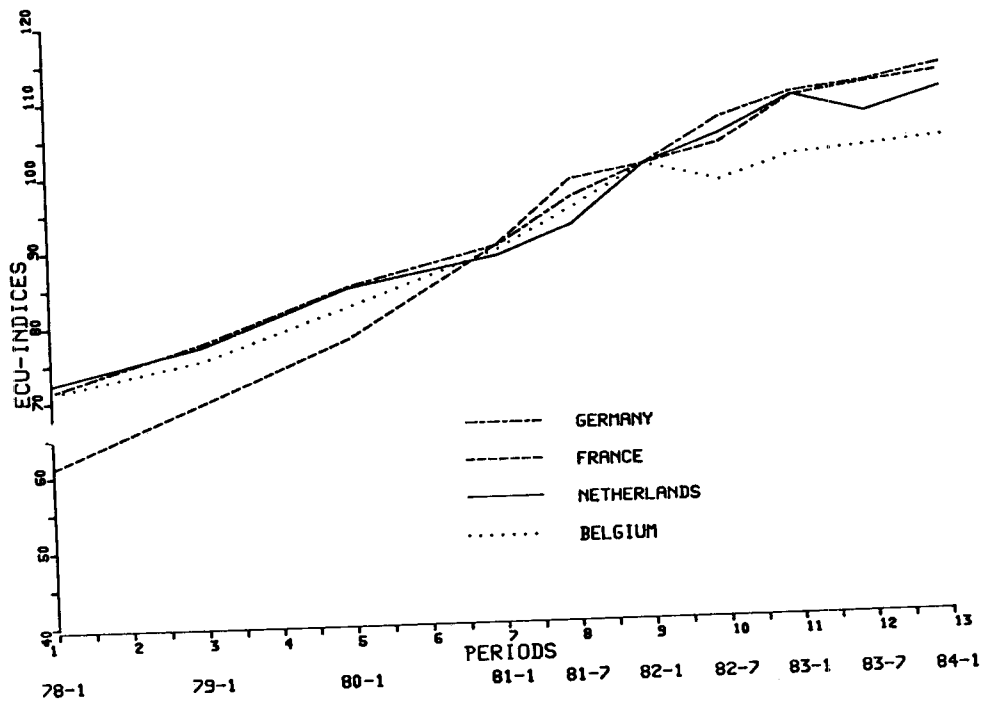


Table 2.21

TOTAL COSTS IN ECU



2.6. Price indices Road

The analysis of the quarterly indices is done each quarter in the Europa Transport report. The figure 2.22. gives the evolution by quarter of the price indices by relation from first quarter 1982.

Table 2.22. Quarterly evolution of the price indices

Haul.	1982				1983				1982				1983			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
	Backhaul															
	Outward															
IIF	100	102.4	103.4	105.1	107.2	108.3	108.2	111.1	100	103.5	104.4	106.3	108.7	109.7	111.3	116.5
IDX	100	101.7	102.9	104.3	106.4	106.9	105.5	107.3	100	101.1	103.6	103.7	105.7	107.5	107.9	107.9
IDL	100	104.-	105.2	104.6	107.6	109.-	110.3	111.8	100	103.1	104.6	105.-	106.6	108.1	109.4	111.3
IDH	100	101.9	104.2	103.1	106.9	107.7	107.-	108.8	100	102.2	103.-	104.3	104.8	105.7	107.2	108.7
IED	100	99.8	93.2	100.3	103.6	97.7	102.9	104.9	100	108.1	99.-	105.1	105.8	105.2	106.2	106.9
EFI	100	99.7	97.4	104.4	110.1	105.-	106.1	106.3	100	100.-	97.4	99.8	108.4	100.8	103.7	105.5
EFNL	100	102.2	102.5	104.9	101.8	101.7	101.3	104.-	100	98.5	99.8	102.1	103.5	95.7	95.6	101.5
EFEL	100	101.4	100.9	101.-	100.9	96.9	99.-	97.5	100	98.-	96.6	101.8	101.7	93.5	93.8	101.6
IID	100	113.4	116.5	108.6	101.9	108.1	113.3	102.3	100	106.2	102.3	104.6	102.1	104.4	99.1	97.4
IIF	100	105.-	103.2	105.1	101.1	103.9	92.9	99.2	100	101.9	97.8	93.4	100.7	101.-	102.4	95.-
IINL	100	100.3	112.5	99.4	93.5	99.5	100.1	68.9	100	121.7	101.4	93.4	100.2	102.7	106.9	103.8
IHEL	100	106.5	121.8	108.3	99.9	94.1	105.2	102.7	100	103.9	95.4	105.5	113.-	110.1	105.2	109.3
NIND	100	102.4	103.6	103.9	104.9	104.7	104.9	104.6	100	101.9	105.2	107.5	106.6	104.1	106.-	106.4
NINF	100	101.4	103.4	105.5	106.-	105.5	107.1	106.3	100	100.9	101.3	103.7	104.1	103.8	105.3	102.5
NNNI	100	100.1	101.4	103.6	105.7	104.-	105.2	105.5	100	103.3	109.1	106.6	105.4	107.1	115.6	110.-
NNHL	100	106.7	102.2	98.-	103.4	101.3	104.-	102.3	100	106.7	102.2	98.-	103.4	101.3	104.-	102.3
HHD	100	94.6	88.9	97.5	95.5	94.7	94.9	91.4	100	94.-	91.6	100.6	101.6	96.6	92.6	99.9
HBF	100	96.4	97.6	99.9	101.5	99.6	103.4	103.-	100	104.7	107.8	103.-	102.-	117.6	144.8	134.8
HBI	100	96.1	95.2	105.5	105.2	110.5	104.1	105.1	100	93.9	125.5	110.7	102.5	122.2	122.9	122.-
HIANL	100	102.4	108.1	107.5	116.-	118.9	129.6	105.5	100	109.9	105.6	113.4	110.9	124.3	160.8	137.9
HBIH	100	99.6	99.6	97.-	97.7	102.5	105.4	101.3								

Table 2.23 Annual increase of price indices in ECU in 1983.

price indice 1983 price indice 1982 haulier/relation	by relation	by direction		average for haulier from Member State	
		outward	backhaul		
DDF (1)	+ 6.9%	+ 5.8%	+ 7.7%	+ 5.6%	D
DDI	+ 4.7%	+ 4.2%	+ 5.0%		
DDNL	+ 5.8%	+ 6.1%	+ 5.4%		
DDBL	+ 4.6%	+ 5.2%	+ 4.1%		
FFD	+ 3.3%	+ 2.6%	+ 4.1%	+ 2.2%	F
FFI	+ 6.0%	+ 6.6%	+ 5.3%		
FFNL	- 0.8%	0.0%	- 1.1%		
FFBL	- 0.5%	- 2.2%	+ 1.0%		
IID	- 2.9%	- 3.0%	- 2.5%	- 3.1%	I
IIF	- 3.0%	- 4.0%	+ 0.2%		
IINL	- 4.2%	- 13.0%	- 0.4%		
IIBL	- 3.2%	- 7.8%	+ 8.2%		
NLND	+ 2.1%	+ 2.2%	+ 2.1%	+ 3.4%	NL
NLNLF	+ 3.0%	+ 3.5%	+ 2.4%		
NLNLI	+ 4.1%	+ 3.8%	+ 4.6%		
NLNLBL	+ 2.3%	+ 2.3%	+ 2.3%		
BLBLD	0.0%	- 1.2%	+ 1.1%	+ 2.7%	BL
BLBLF	+ 10.2%	+ 3.5%	+ 19.2%		
BLBLI	+ 7.8%	+ 7.4%	+ 8.1%		
BLBLNL	+ 15.7%	+ 12.3%	+ 23.4%		
BLBLBL	+ 2.7%	+ 2.7%	-		

*
Average for Belgium/Luxemburg hauliers only includes relations with D and I (see Analysis by Member State).

(1) DDF means a German haulier on the relation Germany-France and France-Germany.

2.6.1. Analysis of the increase of price in ECU in 1983 by Member State

Germany

The price indices increased very much in 1983 on all the relations and on each direction. Germany is the Member State where the general increase was the largest. The increase was very stable in each relation and in each direction.

France

France is the only Member State where the indices did not evolve in the same way for all the relations. Indeed, in relations with Germany and Italy, price indices increased and in relations with the Netherlands and Belgium/Luxemburg, decreased slightly.

Italy

The price indices for Italian hauliers fell in 1983 on all relations. However backhaul prices were stronger and actually rose on the relation IBL and IF by 8.2% and 0.2% respectively.

Netherlands

The price indices increased on all the relations, but less than the German price indices. The increase is very stable on each relation and each direction.

Belgium/Luxemburg

The price indices for the relations BLBLF and BLBLNL do not seem very realistic. Prices in relation with Germany haven't changed, but with Italy there has been a substantial rise.

2.6.2. Evolution in 1983 of cost and price indices in ECU in D, F, NL and B/L

The figure below gives, by Member State, the comparison of the average levels for 1983 with 1982 of both cost and price indices in ECU.

Table 2.23.

	D	F	NL	B/L
price	+ 5.6%	+ 2.2%	+ 3.4%	+ 2.7%
cost (1)	+ 4.9%	+ 6.4%	+ 3.3%	+ 2.7%
difference (P - C)	+ 0.7%	- 4.2%	+ 0.1%	+ 0%

France was the only Member State where the increase in costs in ECU was higher than the increase in prices in ECU, and it was also the Member State where the increase in prices in 1983 compared with 1982 was the lowest.

The difference of increase of prices and costs for Germany and the Netherlands were quite similar, but the increase in costs and in prices was higher in Germany than in the Netherlands.

Belgian/Luxembourg hauliers had the lowest increase of costs. The increase in price and cost indices in 1983 was 2.7% for both indices.

(1) The calculation of the annual increase of the cost indices was done by geometrical averaging of the six-monthly indices of 1982 and 1983.

Table 2.24. Comparison between the level of the backhaul price and the tonnages transported.

Relation	Haulier	Price backh.82 Price outw. 82		Tonnages by haulier from origin country in M ^o .TONNES in 1982		backhaul/ outward	Share of total market
				outward	backhaul		
DF	D F	86,7		5.020	6.902	1,37	62,3%
		94,6		3.981	3.229	0,81	37,7%
DI	D I	94,9		2.523	2.679	1,06	48,9%
		88,4		3.356	2.072	0,62	51,1%
DNL	D NL	98,6		4.687	3.856	0,82	27,6%
		87,1		11.132	11.269	1,01	72,4%
DBL	D BL	98,2		4.071	4.115	1,01	50,4%
		91,6		4.519	3.521	0,78	49,6%
FI	F I	94,4		2.504	2.225	0,89	50,2%
		85,7		2.893	1.803	0,62	49,8%
FNL	F NL	107,7		597	1.053	1,76	28,9%
		72,3		2.228	1.836	0,82	71,1%
FBL	F BL	94,1		3.303	5.592	1,69	38,5%
		93,4		8.274	5.936	0,72	61,5%
INL	I NL	100,6		473	396	0,84	42,3%
		81,5		644	542	0,84	57,7%
IBL	I BL	84,2		534	387	0,72	41,9%
		88		712	566	0,79	58,1%
NLBL	NL BL	99,2		7.162	7.582	1,06	70,8%
		86,9		4.012	2.070	0,52	29,2%

The hauliers with the relatively higher tonnages in the backhaul direction have the higher relative prices in the backhaul direction for 7 out of the 10 relations considered and only lower for 2 out of the 10 relations (DF and DNL) - in the remaining relation (INL) the hauliers from both Member States have similar backhaul tonnage ratios.

Chapter 3

Inland Waterways

3.1. Introduction

3.1.1. The data

Data reproduced in this issue are statistical data from the national statistical offices of Belgium, the Federal Republic of Germany and The Netherlands. For France, figures were provided by the Office National de la Navigation. Figures on Rhine traffic and fleet were provided by the Central Rhine Commission. Data on cost developments are submitted by the Economic Bureau for Road and Waterway transport (E.B.W. - Rijswijk, The Netherlands).

The data published on bilateral traffic are based on information provided by the exporting country.

In the 1982 issue of the Annual Report a comparison was made between 1982 and 1981 and between 1982 and 1979. This was done in order to provide an insight in the developments since the start of the present crisis and overcapacity in the inland waterway sector.

The comparison made in this issue is limited to the one between 1983 and 1982. Since the data provided here are in general comparable to those presented in the 1982 issue, there was no need for a renewed comparison with 1979, the last year in which supply and demand for inland waterway services were balanced. However, where it proved to be useful to put the 1983 developments into perspective, a comparison with 1979 and intermediate years was made.

3.1.2. Overall developments

After three years of increasing decline in transport activity measured in tonnes, 1983 proved to be a year of stabilisation in which a slight increase of about 700.000 tonnes or 0.2% was noted. With the exception of France (-6.2%) all Member States contributed to this positive result, in particular The Netherlands (+ 2.7%) and Belgium (+ 2.7%), as shown in table 3.1.

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

	B/L	D	F	NL	Total	Growth rate
1979	91,191	221,170	85,536	236,825	438,799	
1980	90,943	212,900	84,864	237,599	433,899	-1.1%
1981	87,705	202,770	76,894	222,606	406,442	-6.3%
1982	85,837	196,831	69,249	204,548	379,518	-6.6%
1983	88,148	199,568	64,941	210,062	380,177	+0.2%
1979-1983 difference	-3,043	-21,602	-20,595	-26,763	-58,622	
growth rate	-3.3%	-9.8%	-24.1%	-11.3%	-13.4%	
1982-1983 difference	+2,311	+ 2,737	- 4,308	+ 5,514	+ 659	
growth rate	+ 2.7%	+ 1.4%	- 6.2%	+ 2.7%	+ 0.2%	

In the course of the analysis it will be shown that this result could only be obtained by a strong increase of about 20% in the transports of oil products. Therefore, what has been said in earlier reports of the effects of the crisis in the steel industry on inland waterway transport of ore and coal and of the stagnation in the construction sector on transports of sand and gravel, is still valid.

Since 1979 the inland waterway sector has been subject to important losses of tonnage carried : about 59 million tonnes or more than 13%. While Belgium did extremely well (-3.3% or 3 million tonnes), the situation of France is not far from dramatic (more than 20 million tonnes or 24%), taking into account the ongoing decline in 1983.

Developments in tonnekilometres show a less dramatic picture on the long run (1979-1982 : -6.4%), but in 1983 compared to 1982 transport activity was down by 0.2%. The overall developments and those by country in mio. tkm are shown in the following table.

Table 3.2. National and international activity by country ('000,000 tkm)

	B/L	D	F	NL	Total	Growth rate
1979	5,908	50,987	11,898	33,472	102,265	
1980	5,853	51,435	12,151	33,478	102,917	+0.6%
1981	5,442	50,010	11,068	31,792	98,312	-4.5%
1982	4,958	49,401	10,226	31,363	95,948	-2.4%
1983	4,934	49,100	9,447	32,281	95,762	-0.2%
1979-1983 difference	-974	-1,887	-2,451	-1,191	-6,503	
growth rate	-16.5%	-3.7%	-20.6%	-3.6%	-6.4%	
1982-1983 difference	-24	-301	-779	+918	+186	
growth rate	-0.5%	-0.6%	-7.6%	+2.9%	-0.2%	

By market, national transport and international transport, which is split up in international Rhine traffic and North/South traffic, the developments could be summarized as in table 3.3.

Table 3.3. National and international transport by market ('000 tonnes)

	National	International	
		Rhine * (Emmerich/ Lobith)	North/ South
part of total i.w. transport	55%	33%	12%
1983-1982 tonnes gaines or lost	-4,934	+2,565	+2,597
growth rate	-2.4%	+2.1%	+5.7%
1983-1979 tonnes lost	-45,234	-7,022	-3,347
growth rate	-18.6%	-5.3%	-6.5%

* which includes transport to and from Switzerland and excludes transport between France and Germany.

In general, international inland waterway traffic showed an upturn, while national traffic continued to decrease. Of the international market, North/South traffic showed an important improvement of 5.7%. However, over the past few years North/South lost a bigger share of its transports than Rhine traffic. National traffic decreased considerably : more than 45 mio. tonnes or -18.6%.

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

3.2.1. Table 3.4. presents tonnage figures for 1982 and 1983, the tonnage gained or lost and growth rates for each bilateral relations and for national traffic.

Table 3.4. Inland waterways : tonnes carried, national and international traffic ('000 tonnes)

TO FROM		B/L	D	F	NL	Total outgoing	Total outg.& nation.
B/L	1982	21,899	10,694	4,262	10,923	25,875	47,778
	1983	20,071	10,968	4,085	13,362	28,415	48,486
	difference	-1,828	+274	-177	+2,439	+2,540	708
	growth rate	-8.3%	+2.6%	-4.3%	+22.3%	+9.8%	+1.5%
D	1982	9,266	71,693	2,394	27,975	39,635	111,328
	1983	10,547	70,900	2,648	28,600	41,795	112,695
	difference	+1,281	-793	+254	+625	+2,160	+1,367
	growth rate	+13.8%	-1.1%	+10.6%	+2.2%	+5.4%	+1.2%
F	1982	3,211	10,951	40,600	3,803	17,965	58,565
	1983	3,283	10,910	36,701	3,670	17,863	54,564
	difference	+72	-41	-3,899	-133	-102	-4,001
	growth rate	+2.2%	-0.4%	-9.6%	-3.9%	-0.6%	-6.8%
NL	1982	25,586	63,858	4,028	68,375	93,472	161,847
	1983	25,832	64,995	3,642	69,961	94,469	164,430
	difference	+246	+1,137	-386	+1,586	+997	+2,583
	growth rate	+1.0%	+1.8%	-9.6%	+2.3%	+1.1%	+1.6%
Total ingoing	1982	38,063	85,503	10,684	42,701	176,947	
	1983	39,662	86,873	10,375	45,632	182,942	
	difference	+1,599	+1,370	-309	+2,931	+5,995	
Total ingoing & na- tional	1982	59,962	157,196	51,284	111,076		379,518
	1983	59,733	157,773	47,078	115,593		380,177
	difference	-229	+577	-4,208	+4,517		+659
	growth rate	-0.4%	+0.4%	-8.2%	+4.1%		+0.2%

3.2.2. As far as national inland waterway transport markets are concerned only The Netherlands showed a slight improvement. In all other countries a loss in tonnage could be noted, in particular in France (-9.6%) and Belgium/Luxemburg (-8.3%). In France, the situation is getting dramatic after a loss of tonnage on national transports in the years 1981 and 1982 of 9.7% and 11.8% respectively.

3.2.3. Ingoing and outgoing traffic of the Member States showed in 1983, compared to 1982, positive developments, with the exception of France. In international inland waterway transport about 6 mio. tonnes more were carried in 1983 than in 1982.

To these positive results, the main contributors were :

- outgoing traffic of Belgium/Luxemburg and Germany
- ingoing traffic of The Netherlands and Belgium/Luxemburg

France lost more than 4 mio. tonnes (-6.8%) in outgoing and 0.3 mio. tonnes (-2.9%) in ingoing traffic. This stresses the point made in the previous paragraph concerning the very serious situation in the French inland waterway sector.

3.2.4. On all bilateral relations of France with the exception of D --F a decrease could be noted. All other bilateral relations showed increases, some of them very important, like on

B/L → NL	+2,439 mio. tonnes	+22.3%
D → B/L	+1,281 mio. tonnes	+13.8%
NL → D	+1,137 mio. tonnes	+ 1.8%

3.3. Inland waterway transport by commodities

3.3.1. The four commodities most relevant to international inland waterway sector in the order of their importance are the following :

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

In 1983, 274.5 mio. t of goods in these four NST groups were shipped in and between Member States, which is 72.4% 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 national and international inland waterway traffic from 1979 to 1982 developed as follows :

Table 3.5. Inland Waterways : tonnes of NST 6, 4, 3 and 2 carried international and national traffic ('000 tonnes)

	NST				
	6	4	3	2	Total
1979	166,758	45,928	81,836	32,379	326,901
1980	165,406	43,105	76,923	37,064	322,498
1981	149,488	40,308	69,960	37,905	297,661
1982	131,967	39,809	68,735	38,307	278,818
1983	130,496	37,834	71,205	34,940	274,475
1979-1983 difference	-36,262	-8,094	-10,631	+2,561	-52,426
growth rate	-21.7%	-17.6%	-13.0%	+7.9%	-16%
1982-1983 difference	- 1,471	-1,975	+2,470	-3,367	-4,343
growth rate	- 1.1%	-5.0%	+ 3.6%	-8.8%	- 1.6%

As already implied in paragraph 3.1.2., of the four main commodity groups only the shipment of petroleum product showed a positive development. This growth (+3.6%) was not sufficient to off-set the decrease noted for the other NST-groups which are very important for inland navigation sector. In particular the transports of coal (-8.8%) and ore (-5.0%) were considerable influenced by the steel crisis and, as far as coal is concerned, the change in energy and environment policies.

Since 1979, transports of sand and gravel (-21.7%) and ore (-17.6%) encountered serious losses, while coal shipments are still of more importance than before the second energy crisis.

3.3.2. The share of these four NST-groups in total national and international inland waterway transports decreased gradually from 74.5% in 1979 to 72.4% in 1983. The development of the shares of the individual groups is shown in the following table.

Table 3.6. Share of NST 6, 4, 3 and 2 in total national and international inland waterway transport.

	NST				
	6	4	3	2	Total
1979	38.0%	10.5%	18.6%	7.5%	74.5%
1980	38.1%	9.9%	17.7%	8.5%	74.3%
1981	36.8%	9.9%	17.2%	9.3%	73.2%
1982	34.6%	10.4%	18.0%	10.0%	73.1%
1983	34.4%	10.0%	18.8%	9.2%	72.4%

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

3.3.3. NST 6 : Building materials

The key industry for goods in this group is the building and construction industry. In 1983, as in 1982, the sector suffered because of high interest rates and gloomy perspective on the development of personal income which kept construction activity at a low level. Moreover, the budgetary problems of governments forced Member States to limit their expenditure in the field of investments in public works. An uncertain economic outlook for the industry in general pushed investments in industrial construction further down.

As was shown in table 3.5., national and international transport of NST 6 decreased by 1.1%. In table 3.7. a more detailed picture on developments is given.

Table 3.7. : Inland waterways; tonnes of NST 6 carried in national traffic and on bilateral relations ('000 tonnes)

FROM \ TO		B/L	D	F	NL	Tot. outgoing
B/L	1982	4,371	800	999	5,098	6,897
	1983	3,863	877	918	6,539	8,344
	difference	- 508	+77	-71	+1,441	+1,447
	growth rate	-11.6%	+9.6%	-7%	+28.3%	+21.0%
D	1982	1,851	20,216	270	17,443	19,564
	1983	1,753	20,701	304	16,919	18,976
	difference	- 98	+485	+34	-524	-588
	growth rate	-5.3%	+2.4%	+12.6%	-3.0%	-3%
F	1982	412	7,974	18,908	1,238	9,624
	1983	192	7,548	17,263	1,253	8,993
	difference	- 220	-426	-1,645	+15	-631
	growth rate	-53.4%	-5.3%	-8.7%	+1.2%	-6.6%
NL	1982	11,079	1,939	216	39,153	13,234
	1983	9,728	2,191	188	40,501	12,107
	difference	-1,351	+252	-28	+1,348	-1,127
	growth rate	-12.2%	+13.0%	-13.0%	+3.4%	-8.5%
Total ingoing	1982	13,342	10,713	1,485	23,779	49,319
	1983	11,673	10,364	1,420	24,711	48,168
	difference	-1,669	-349	-65	+932	-1,151
	growth rate	-12.5%	-3.3%	-4.4%	+3.9%	-2.3%

In international transport of NST 6 the loss of tonnes transported was relatively of greater importance than in national traffic (- 2.3% against - 0.4%). In 1981 and 1982 international traffic of sand and gravel decreased by 8.1% and 5.8% respectively. Since 1979 these transports decreased by 7.8 mio.tonnes or 14%.

Belgium and France were severely hit by the crisis in the construction sector. Taking into account national and ingoing traffic Belgium lost more than 2.0 mio.tonnes and France more than 1.7 mio.tonnes. The German imports and national transports by inland waterway remained stable (+ 0.5%), while Dutch ingoing and national traffic increased by about 2.3 mio.tonnes (+ 3.5%).

Consequently, outgoing traffic of Member States decreased, except for Belgium which noted a 1.4 mio.tonnes increase for transports to the Netherlands following a rate reduction for these transports.

3.3.4. NST 4 : Ores and metal waste

Because NST 4 goods are raw materials for the steele industry, the quantities carried are influenced by the recession and the restructuring of the steele industry. Consequently, transport activity decreased further by 5% in 1983 after having seen a decrease of 5.4. mio.tonnes or 13.4% between 1979 and 1983.

Table 3.8 shows that only one traffic relation is of real importance : NL - D. On this relation 7.1 mio.tonnes of traffic has been lost since 1979 or 19.8%.

Table 3.8 Inland waterways; tonnes of NST 4 carried in national traffic and on bilateral relations ('000 tonnes)

FROM \ TO		B/L	D	F	NL	Tot. outgoing
B/L	1982	1,322	1,103	618	145	1,868
	1983	1,578	453	657	278	1,388
	difference	+ 256	- 650	+39	+133	- 480
	growth rate	+19.4%	-58.9%	+6.3%	+91.7%	-25.7%
D	1982	235	2,493	209	121	565
	1983	223	2,198	404	493	1,120
	difference	- 12	-295	+195	+372	+555
	growth rate	-5.1%	-11.8%	+93.3%	+307.4%	+98.2%
F	1982	9	21	148	0	30
	1983	11	2	101	0	13
	difference	+ 2	- 19	+ 47	0	- 17
	growth rate	+22.2%	-90.5%	+31.8%	0	-56.7%
NL	1982	2,437	28,807	1,259	882	32,503
	1983	1,423	28,230	872	911	30,525
	difference	-1,014	-577	- 387	+ 29	-1,978
	growth rate	-41.6%	-2.0%	-30.7%	+3.3%	- 6.1%
Total ingoing	1982	2,681	29,931	2,086	266	34,964
	1983	1,657	28,685	1,933	711	33,046
	difference	-1,024	-1,246	- 153	+505	-1,918
	growth rate	-38.2%	-4.2%	-7.3%	+189.8%	-5.5%

3.3.5 NST 3 : Petroleum Products

Contrary to other goods categories which are important to inland waterway transport, traffic of petroleum products has been increasing during the last few years following the stabilisation and - later on - the reduction of oil prices. In 1982 international transports increased by 5.2% and in 1983 a 19% increase could be noted.

Of the international relations Dutch outgoing traffic covers about 2/3 of all international relation. The increase of these relations was about the same as the overall increase.

As far as national traffic is concerned only the Netherlands noted a slight improvement.

Table 3.9 Inland waterways; tonnes of NST 3 carried in national traffic and on bilateral relations ('000 tonnes)

FROM \ TO		B/L	D	F	NL	Tot. outgoing
B/L	1982	6,357	3,691	262	2,137	6,090
	1983	5,664	4,558	271	2,705	7,534
	difference	-693	+867	+9	+568	+1,444
	growth rate	-10.9%	+23.5%	+3.4%	+26.6%	+23.7%
D	1982	356	19,175	154	1,092	1,602
	1983	319	17,983	308	817	1,144
	difference	-37	-1,192	+154	-275	-458
	growth rate	-10.4%	-6.2%	+100%	+25.4%	-28.6%
F	1982	6	865		32	903
	1983	1	1,237	7,874	51	1,289
	difference	-5	+372	-1,143	+19	+386
	growth rate	-83.3%	+43%	-12.7%	+59.4%	+42.9%
NL	1982	5,850	12,951	299	6,495	19,100
	1983	7,654	14,592	442	6,729	22,688
	difference	+1,804	+1,641	+143	+234	+3,588
	growth rate	+30.8%	+12.7%	+47.7%	+3.6%	+18.8%
Total ingoing	1982	6,212	17,507	715	3,261	27,695
	1983	7,974	20,387	1,021	3,573	32,955
	difference	+1,762	+2,880	+306	+312	+5,260
	growth rate	+28.3%	+16.5%	+42.8%	+9.6%	+19.0%

3.3.6. 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 on 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 in general 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 reversed in 1983 because of the reduction and stabilisation of oil prices. France and Belgium depend to an increasing extent on nuclear power stations for energy production and play a minor role in the international coal transport by inland waterway scene.

Table 3.10 shows the results of these developments. In 1980 the overall carriage of coal increased by 3.5%. After stabilisation in 1981 (-0.2%), 1982 and 1983 show a sharp reduction in transport activity (-7.3% and -16.1%) respectively. German exports fell during the period 1979-1983 by about 3 mio.tonnes or 35%. German imports went down by 24% in 1983 after 100% increase between 1979 and 1983. Consequently, Dutch exports decreased in 1983.

In France and Belgium the national transport market for coal contracted, the one in Germany remained stable, while in the Netherlands an improvement could be noted.

Table 3.10. Inland waterways; tonnes of NST 2 carried in national traffic and on bilateral relations ('000 tonnes)

FROM \ TO		B/L	D	F	NL	Tot. outgoing
B/L	1982	3,344	566	109	151	826
	1983	2,701	433	60	110	603
	difference	-643	-133	-49	-41	-223
	growth rate	-19.2%	-23.5%	-45.0%	-27.2%	-27.0%
D	1982	819	11,212	1,232	3,366	5,417
	1983	1,057	11,303	1,088	3,244	5,389
	difference	+238	+91	-144	-122	-28
	growth rate	-29.1%	+0.8%	-11.7%	-3.6%	-0.5%
F	1982	2	144	6,815	17	163
	1983	7	148	5,795	59	214
	difference	+5	+4	-1,020	+42	+51
	growth rate	+250%	+2.8%	-15.0%	+247%	+31.3%
NL	1982	1,418	4,182	712	4,218	6,312
	1983	703	3,139	616	4,477	4,458
	difference	-715	-1,043	-96	+259	-1,854
	growth rate	+50.4%	-24.9%	-13.5%	+6.1%	-29.4%
Total ingoing	1982	2,239	4,892	2,053	3,534	12,718
	1983	1,767	3,720	1,764	3,413	10,664
	difference	-472	-1,172	-289	-121	-2,054
	growth rate	-21.1%	+24.0%	-14.1%	-3.4%	-16.1%

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 tonnes and tonnekilometers traditional Rhine traffic (i.e. international Rhine traffic plus German and French national traffic touching the Rhine, and including traffic to and from Switzerland) is shown below :

Table 3.11. Traditional Rhine traffic ('000 tonnes and '000.000 tkm)

	'000 tonnes	difference	growth rate	'000.000 tkm	difference	growth rate
1979	205,473			36,772		
1980	198,166	- 7,307	- 3.4%	36,326	- 446	-1.2%
1981	189,731	- 8,435	- 4.3%	35,486	- 840	-2.3%
1982	184,253	- 5,478	- 2.9%	35,143	- 343	-1.0%
1983	187,691	+ 3,438	+ 1.9%	35,095	- 48	-0.1%
1979-1983		-17,782	- 8.7%		-1,677	-4.6%

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 3.4%, 4.3% and 2.9% in consecutive years.

In 1983 this trend reversed and a slight increase of 3.4 mio. tonnes or 19% could be noted.

In terms of tonnekilometres the negative development of the last few years has been less dramatic, but still important. In 1983 the situation became stable (-0.1%).

Another indicator for international Rhine traffic is the development in traffic registered at the German/Dutch border at Emmerich/Lobith. Tables 3.12. and 3.13. show the developments of upstream and downstream traffic by commodity group.

Table 3.12. : International Rhine traffic passing Emmerich/Lobith upstream ('000 t)

	1982	1983	difference	growth rate
Total	81,885	83,238	+1,353	+ 1.7%
NST Chapters				
0	2,548	2,318	- 230	- 9.0%
1	7,283	7,105	- 178	- 2.4%
2	5,800	4,480	-1,320	-22.8%
3	19,419	22,816	+3,397	+17.5%
4	31,612	29,914	-1,698	- 5.4%
5	3,980	4,209	+ 229	+ 5.8%
6	2,767	2,895	+ 128	+ 4.6%
7	2,828	3,139	+ 311	+11.0%
8	5,033	5,543	+ 510	+10.1%
9	615	819	+ 204	+33.2%

In upstream traffic, about 65% of all traffic passing this point, an increase of 1.7% was registered. NST 4 and 3 are the most important commodity groups on this link.

For reasons explained earlier in this section of the report traffic of ore and metal waste decreased by about 1.7 mio.tonnes (5.4%). This decrease amounted to 7.7 mio.tonnes or 21% since 1979. Traffic of petroleum products went up by 17.5% or 3.4 mio.tonnes in 1983 after an increase of 12.5% or 2.2 mio.tonnes in 1982.

Table 3.13. Internatinal Rhine traffic passing Emmerich/Lobith downstream ('000 t)

	1982	1983	difference	growth rate
Total	41,837	43,049	+1,212	+ 2.9%
NST Chapters				
0	964	1,332	+ 368	+38.2%
1	1,703	1,256	- 447	-26.3%
2	4,262	5,015	+ 753	+17.7%
3	1,257	1,077	- 180	-14.4%
4	368	671	+ 303	+82.3%
5	5,383	5,140	- 243	- 4.5%
6	21,342	20,650	- 692	- 3.2%
7	1,757	2,116	+ 359	+20.4%
8	2,736	3,410	+ 674	+24.6%
9	2,065	2,382	+ 317	+15.4%

In downstream traffic, an increase of 2.9% was noted. Transport of sand and gravel (NST 6) has a share of over 50% on this link. Traffic decreased in 1983 by 0.7 mio. tonnes or 3.2%. Since 1979 NST 2 transports decreased 3.2. mio. tonnes or 14%.

3.4.3. North-South

North-South consistis of the network of rivers and canals west of the Rhine between the Netherlands, Belgium and France. By commodity group the market situation changed between 1982 and 1983 as follows :

Table 3.14. : North-South traffic ('000 tonnes)

	1982	1983	difference	growth rate
Total	45,201	47,798	+2,597	+ 5.7%
NST Chapters				
0	5,370	5,411	+41	+0.8%
1	4,160	3,947	-213	-5.1%
2	1,457	944	-513	-35.2%
3	7,877	10,525	+2,648	+33.6%
4	2,387	2,183	-204	-8.5%
5	1,975	1,918	-57	-2.9%
6	17,000	17,297	+297	+1.7%
7	2,096	1,901	-195	-9.3%
8	2,030	2,499	+469	+23.1%
9	841	1,170	+329	+39.1%

The trend in North/South traffic has been downward since 1980. In 1981 and 1982 taken together a decrease of 10.5 mio. tonnes or 19% could be noted.

In 1983 a strong recovery of the market emerged : + 2.6 mio. tonnes or 5.7%.

NST 6 is by far the most important commodity shipped on this market. After two years of important losses in tonnes, 1983 shows a slight improvement of a 0.3 mio. tonnes or 1.7%. As in the case of the Rhine the shipment of petroleum products contributed to a very large extend to the general improvement of the market.

3.5. Fleet developments

Notwithstanding a slight recovery of the inland waterway transport market in 1983, a clear downward trend in demand since 1979 of 13.4% in tonnes and of 6.4% in tonnekilometers remains. In this paragraph the development of the supply side, i.e. 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) is given in order to indicate the market situation in terms of overcapacity.

3.5.1. Total fleet

Table 3.15. 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 3.15. : Fleet developments : total fleet in number of vessels and carrying capacity ('000 tonnes)

	1.1. 1979	1.1. 1983	1.1. 1984	1982- 1979	Growth	1984- 1983	Growth rate
Total: vessels	19,397	17,707	17,238	-2,159	-11.2%	-469	-2.6%
carrying capacity	13,171	12,947	12,779	-168	-3.0%	-168	-1.3%
B : vessels	3,321	2,758	2,675	-646	-19.5%	-83	-3.0%
carrying capacity	1,955	1,785	1,759	-196	-10.0%	-26	-1.5%
L : vessels	20	16	15	-5	-25.0%	-1	-6.3%
carrying capacity	12	11	11	-1	-8.3%	0	0.0%
D : vessels	4,230	3,496	3,411	-819	-19.4%	-85	-2.4%
carrying capacity	3,859	3,459	3,422	-437	-11.3%	-37	-1.1%
F : vessels	5,525	4,976	4,831	-694	-12.6%	-145	-2.9%
carrying capacity	2,618	2,464	2,374	-244	-9.3%	-90	-3.7%
NL : vessels	6,301	6,461	6,306	+5	+0.1%	-155	-2.4%
carrying capacity	4,727	5,228	5,213	+486	+10.3%	-15	-0.3%

In 1983 the fleet of the Member States decreased by 469 vessels (-2.6%) and 168.000 tonnes carrying capacity. Since 1979 the number of vessels has diminished considerably by 11.2%. On the other hand capacity decreased only to a relatively small extent : -3.0%. This figure is the result of two opposite tendencies : on the one hand the fleets of Belgium, Luxembourg, Germany and France decreased by 10.4%; on the other hand the capacity of the Dutch fleet increased by 10.3%.

Consequently, the relative shares of the national fleets in the total fleet changed considerably over the years, as is shown in table 3.15.

Table 3.16. National shares in total fleet capacity

	1.1.1979	1.1.1984	difference
B	14.8%	13.7%	-1.1%p
L	0.1%	0.1%	0.0%p
D	29.3%	27.3%	-2.0%p
F	19.9%	18.5%	-1.4%p
NL	35.9%	40.5%	+4.6%p

3.5.2. Overcapacity

In last year's issue of the Annual Report an estimate was made of the overcapacity in the inland navigation sector. The calculation was based on the assumption that 1979 was a year in which a reasonable equivalent between supply and demand existed. The extent to which developments in 1983 have effected the overcapacity situation is shown in the following table.

Table 3.17. Estimated overcapacity of the total fleet

	1.1.1984	1.1.1983
demand (tkm)	-6.4%	-6.2%
supply (t. carrying capacity)	-3.0%	-1.7%
balance	-3.4%	-4.5%
prod. incr. (1%/year)	+5.0%	+4.0%
estimated overcapacity	8.4%	8.5%

Overcapacity stabilized in 1983. In terms of tonnes overcapacity could be estimated at a level of about 100 mio. tonnes.

In the "Analysis and Forecast" report of the market observation system issued in the series "Europa Transport", a 2.6% increase in tonnes is forecast for international transport by inland waterway. Assuming a 2.6% increase for inland waterway transport - national and international - in tonnekilometres and a further increase of 1% in productivity, no further reduction in carrying capacity will keep overcapacity at the level of about 7% or 900.000 tonnes. A real effort to reduce capacity by policies which stimulate scrapping remains necessary to obtain a real improvement of the situation in the inland navigation market.

3.6. Inland waterway transport by flag

Not all the 1983 data on the share of the fleet of each of the Member States in inland waterway transport is as yet available. Therefore, data from 1981, based on tonnes carried are presented here in order to give an insight in traffic on each of the inland waterway transport markets.

3.6.1. Flagshares on national and international markets

In table 3.18. flag shares are given for national transport, international transports, ingoing and outgoing traffic and total transport, including transit traffic of Belgium/Luxembourg, Germany, France and The Netherlands. Next to the traffic shares of each country the share is given for other carriers ("O"). Under this heading vessels of Swiss (71.3%) and East bloc (20.8%) nationalities are the most important.

Table 3.18. : Inland waterways; national and international traffic in tonnes; share by nationality of the vessel, 1981 (%)

	nationality of the vessel	national traffic	international traffic	outgoing traffic	ingoing traffic	total traffic (incl. transit)
B/L	B/L	91.8	36.2	35.4	36.8	50.0
	D	1.1	7.8	11.6	5.1	5.9
	F	0.5	6.4	6.2	6.6	6.1
	NL	5.9	44.2	38.1	48.5	34.0
	O	0.7	5.4	8.7	3.0	4.0
D	B/L	0.8	6.0	8.0	4.8	4.4
	D	89.4	34.2	21.5	41.4	51.5
	F	0.2	2.4	3.0	2.0	2.3
	NL	6.3	44.7	50.8	41.2	31.2
	O	3.3	12.7	16.7	10.6	10.6
F	B/L	0.2	19.7	13.3	32.0	6.7
	D	0.2	37.8	47.4	19.3	16.2
	F	99.1	20.4	15.7	29.6	62.5
	NL	0.1	12.8	11.4	15.5	7.2
	O	0.4	9.3	12.2	3.6	7.4
NL	B/L	1.5	13.6	13.4	14.1	11.8
	D	0.1	22.1	26.1	14.0	14.9
	F	0.0	3.3	3.2	3.6	2.3
	NL	97.8	54.5	50.7	62.0	66.0
	O	0.6	6.5	6.6	6.3	5.0

As becomes clear from the table, national traffic is in the hands of transporters of that same country. Flagshares tend to be about 90% and well above. Only Dutch carriers have a small share of about 6% in Belgian and German national traffic.

In international traffic, the very strong position of the Dutch fleet is the most interesting feature. Not only do Dutch vessels carry 54.5% of Dutch international traffic, they also are the main transporter of German (49.3%) and Belgian (44.7%) international traffic. This important marketshare is hold in ingoing as well as in outgoing traffic.

In German and Belgian international traffic, national carriers hold important market shares of more than one third of the tonnage transported. As far as Belgium is concerned the share is about the same in ingoing as in outgoing traffic. For German flag vessels the share is twice as big in ingoing as in outgoing traffic.

On the French international inland waterway transport market German carriers hold the biggest share (37.8%), in particular in ingoing traffic. Belgian and French vessels carry about one fifth on that market.

Figures on market shares in total international traffic, based on tonnes carried and tonnekilometres, as well as in international Rhine shipping, based on tonnes carried, are presented in table 3.19. Market shares in North/South transport could be estimated on the bases of the other two figures.

Table 3.19. : Flag shares in total international transport and international transport by market, 1981 (%)

Flag	Total international traffic		Rhine traffic (tonnes)	North/South traffic (tonnes)*
	(tkm)	(tonnes)		
B/L	11.1	15.2	7.6	39.9
D	33.1	25.3	29.6	12.6
F	4.9	4.9	2.7	11.2
NL	41.8	45.7	51.7	36.3
O	9.1	8.9	8.4	0.0

* estimated

As is shown in the table, the strong position of the Dutch flag in international inland waterway is based in particular on a 51.7% share in international Rhine shipping.

In international North/South shipping the Belgian transporters have the main share (39.9%), followed by the Dutch (36.3%).

3.6.2 Flagshares in total inland waterway transport and fleetutili- sation.

On the total inland waterway transport market, national and international, the share of each nationality, based on transport activity in tonnekilometres is given in table 3.20. In column (2) the flagshares are given by excluding third flags; in column (3) the part of each flag in the total fleet measured in tonnes carrying capacity in 1981 is given.

Table 3.20. : Flagshares in total international transport and in the total fleet, 1981 (%)

Flag	Total traffic		Total fleet (3)	Fleetutilisa- tionratio (4) $=\frac{(2)}{(3)} \times 100$
	(1)	(2)		
B/L	9.9	10.8	14.0	77.1
D	35.0	38.1	27.3	139.6
F	10.5	11.4	19.6	58.2
NL	35.7	38.7	39.1	99.0
O	8.9	-	-	-

If we compare flag shares and fleetshares, as is done in column (4), we have a measure for the extent to which the fleets are utilized on the inland waterway market. We will call this measure the fleet utilisation ratio. The change of these coefficients over the years could be an interesting indicator which can also be related to cost- and price indices.

As the table shows the fleet of the German has a high fleet utilisation ratio (139.6), while the French fleet shows a very low utilisation ratio (58.2).

3.7. 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.

3.7.1. Rhine

The development in tonnes of Rhine traffic throughout the year evolved from a bad first and second quarter (-0.7% and -1.0%) to a fairly good third and fourth quarter. The aggregate balance of opinions on activity and utilisation of capacity published in the quarterly reports "Market developments" show this development clearly. Quarterly statistics confirm this picture, as shown below.

Table 3.21. Traditional Rhine traffic ('000 tonnes and '000,000 tkm)

	'000 tonnes 1983	'000 tonnes 1982	Change	'000.000 tkm 1983	'000.000 tkm 1982	Change
<u>Quarter</u>						
1	43.969	44.280	-0.7%	8.524	8.341	+2.2%
2	48.023	48.500	-1.0%	9.162	9.219	-0.6%
3	48.936	46.471	+5.3%	9.213	8.946	+3.0%
4	46.763	44.442	+5.2%	8.196	8.635	-5.1%

In tonnekilometres the picture is more varied. The decrease during the fourth quarter could be explained by the extreme low waterlevels during that particular period, which effect in particular the long distance shipments to and from the Upper-Rhine.

Freightrates were reported to remain very low even during the low waterlevel period.

3.7.2. North/South

Waiting time is one of the best indicators of economic activity on the North/South markets, in particular in the dry bulk sector. Transport of oil products (the main factor to the positive developments on important parts of these market) is in general free from "bourse" - intervention.

The following table published earlier in "Market developments" shows these development in the last three years.

Table 3.22. Quarterly average of waiting days in international North-South traffic.

Country of origin	Year	Q1	Q2	Q3	Q4	Average
B*	1981	7.0	6.0	8.0	4.5	6.4
	1982	5.2	7.5	8.5	7.5	7.2
	1983	8.2	8.8	8.5	7.5	8.3
F	1981	8.5	7.0	15.3	14.0	11.2
	1982	9.2	18.0	16.1	12.5	14.0
	1983	20.9	17.0	21.0	16.2	22.3
NL	1981	8.3	4.4	5.6	3.0	5.3
	1982	6.5	6.2	9.8	7.1	7.4
	1983	6.9	6.9	8.5	4.9	6.8

* Belgian domestic and Belgium to France

The very negative developments in France -16.1% in 1982 and -8.9% in 1983 on national plus outgoing traffic excluding traffic to Germany (Rhine traffic) - become very clear from the table. On average the number of waiting days went up from 11 to 14 and 22.

In Belgium the average number of waiting days went up from 7 to 8 in 1983 because of a 7.3% drop in national transport and a 7.7% drop in outgoing transport, oil products shipments and transport to Germany (Rhine shipping) excluded.

In the Netherlands the average number of waiting days decreased from 7.4 to 6.8 in 1983, although national and outgoing transport to Belgium and France decreased by about 0.7 mio tonnes (-1.3%) excluding transport of oil products and sand and gravel (outside the "bourse" procedure). The low water levels on the Rhine during the last quarter of 1983 influenced the average number of waiting days on the North/South markets to a considerable extent because more capacity was needed to ship the goods on the Rhine. In the case of the other Member States the reduction of the number of waiting days during the last quarter of 1983 could not avoid the average to go up.

3.8. Cost Indices

Cost indices for international inland waterway transport were published for the first time in the quaterly report "Market developments" no. 10. In this Annual Report the cost developments in 1983 will be summarized.

3.8.1. Methodoly

Cost indices are calculated for four shiptypes :

- ships having a carrying capacity of 350 tonnes;
- ships having a carrying capacity of 600 tonnes;
- ships having a carrying capacity of 1200 tonnes;
- pusher units.

Since the information on pusher units is not yet available these calculations are based on the costs of 4 motorvessels of 2200 tonnes.

The cost indices are calculated following a given cost structure in the base year (1.1.1982). The following cost elements are taken into account :

- wages
- capital
- fuel
- other costs

On waiting days the following assumptions were made :

Rhine : 1 day
N/S : 10 days.

The calculations are based on the actual cost developments on 47 international traffic relations representing total international waterway transport in the Community. By weighting the various relations cost indices and cost elements, indices are found for each of the bilateral traffic relations between Member States and for the North-South and Rhine inland waterway transport markets.

The information is collected twice a year, on 1 January and 1 July.

3.8.2. Overall cost development and by market

Table 3.23. Overall cost indices and cost indices by market 1.1.1983, 1.7.1983 and 1.1.1984 in ECU (1.1.1982 = 100).

		1.1.1983	1.7.1983	1.1.1984
Overall	wages	107.4	110.0	112.5
	capital	95.9	95.2	95.5
	fuel	106.6	99.5	108.2
	other costs	103.9	105.2	106.9
	total costs	103.7	104.0	106.2
Rhine	wages	109.2	111.6	114.7
	capital	97.4	97.5	97.6
	fuel	108.4	100.0	108.3
	other costs	105.6	107.8	109.5
	total costs	105.3	105.5	107.9
N/S	wages	104.7	107.6	108.9
	capital	93.5	91.6	92.1
	fuel	103.8	98.9	107.9
	other costs	101.3	101.1	102.8
	total costs	101.1	101.9	103.6

After a slight increase of 3.7% in 1982, costs increased by 2.4% in 1983. Capital costs decreased following a reduction of interest rates. Fuel costs decreased in the first half of 1983, but went up to above the 1.1.1983 - level during the second half. Other cost elements increased gradually.

In Rhine shipping costs increased more in 1982 than on the North-South market (105.3 against 101.1); all costs elements showed the same pattern. In 1983, cost development by market showed hardly any difference between Rhine and North-South (both: +2.5%), be it that in the first half year costs rose faster on the North-South and during the second half year on the Rhine.

For cost development by shiptype and by flag reference is made to the quarterly reports "Market developments" no. 10 and 12.

3.8.3. Total cost development by nationality of the carrier and by relation

In the following table cost increases in 1982 are broken down by nationality of the carrier.

Table 3.24. : Total cost indices by nationality of the carrier in national currency (1.1.1982 = 100).

	B(BF)	D(DM)	F(FF)	NL(HFL)
1.1.1983	101.9	100.7	106.9	100.7
1.7.1983	105.3	102.7	111.7	100.3
1.1.1984	106.7	104.5	115.9	102.1

After rather limited total cost increases in 1982, with the exception of France, costs increased considerably in 1983 for French carriers (+8.4%) and German (4.8%) and Belgian (+4.7%) carriers. For Dutch vessels costs increased only by 1.4% in 1983.

By bilateral relation, cost increases did not show very much difference among each other because vessels of different nationality are participating in each relation. Table 3.22. present cost increases by relation in 1983.

Table 3.25. Cost increases 1983 by relation

	B	D	F	NL	outgoing
B	-	+2.5%	+3.2%	+1.7%	+2.4%
D	+2.0%	-	+3.5%	+1.4%	+2.0%
F	+3.2%	+5.5%	-	+2.7%	+3.8%
NL	+2.1%	+2.4%	+2.6%	-	+2.2%
ingoing	+2.3%	+2.8%	+3.1%	+1.7%	+2.5%

In general the differences between relations were not very important : on 6 of the 12 relations cost increases were between 2% and 3%; on 2 relations between 1% and 2%; on 3 between 3% and 4%. Only in the case of F → D costs increased by more than 4% : 5.5%.

3.8.4. Comparison between cost and price developments on the Rhine

The cost developments on the Rhine could be compared to price developments on that same inland waterway network since the C.C.R. is publishing price indices. A distinction is made between dry cargo and liquid cargo.

Table 3.26. Cost and price developments in Rhine traffic
(1 quarter 1982 = 100)

quarter	Total cost indices	price indices	
		liquid cargo	dry cargo
1/82	100.0	100.0	100.0
2/82		97.3	95.6
3/82	102.4	95.5	92.3
4/82		100.0	90.1
1/83	105.3	93.6	89.0
2/83		93.6	89.0
3/83	105.5	93.6	90.1
4/83		122.7	104.4
1/84	107.9	109.1	98.9

As is shown in the table, the prices for inland waterway transport services on the Rhine decreased considerably in 1982 and stayed at a low level in 1983 following the overcapacity situation, in particular in the dry bulk sector.

If the first quarter 1979 is considered as 100, tariffs were 20% lower in 1982 and 1983 than in 1979 for dry bulk and about 6% in 1983 for liquid bulk.

Only in the last quarter of 1983 during which low water levels occurred prices reached a level above the one from the first quarter 1982, in particular as far as the tanker sector is concerned.

On the other hand, total costs increased by about 8% in two years time. Given the capacity situation in the dry bulk sector, profitability of the firms is under high pressure. In the liquid bulk sector, where no structural overcapacity exists, the increased number of tonnes carried tended to compensate for the difference between rising costs and stagnating prices.

CHAPTER 4

RAIL

4.1. Introduction

The continuous drop since 1979 of international rail transport was slowed down in 1983.

Total tonnage decreased only by about -1.4% compared with 1982 which has been the best result for many years.

4.2. Intra EUR-10 international rail activity in 1983

4.2.1. Table 4.1. below gives the whole EUR-10 matrix of tonnages moved by rail:

- in 1983 (above figure in each cell)
- in 1982 (second figure in each cell)

The third figure of each cell represents the percentage change of 1983 on 1982.

Ingoing data have been retained for all countries except for the UK where exporting figures of the partner country have been used (due to a lack of split of the UK ingoing data).

Table 4.1. : Intra EUR-10 rail traffic

'000 TONNES

	D	F	I	NL	B	L	UK	IRL	DK	GR	TOTAL
D	--	6071 6675 -9	4506 4571 -1	1580 1818 -13	2888 2387 +21	1612 1844 -13	135 136 -1	--	714 821 -13	78 103 -24	
F	3589 4195 -14	--	6155 6317 -3	447 606 -26	5645 4480 +26	198 161 +23	214 155 +38	--	70 77 -9	20 21 -5	
I	2190 2088 +5	1896 1970 -4	--	433 482 -10	739 780 -5	3 5 -40	382 378 +1	--	60 54 +11	25 24 +4	
NL	3420 3198 +7	1133 927 +22	489 439 +11	--	731 1350 -46	9 4 +225	NA	--	13 16 -19	4 4 -	
B	2125 1974 +8	4798 4628 +4	1025 1126 -9	1728 1411 +22	--	2184 2699 -19	59 49 +20	--	34 39 -13	8 7 +14	
L	943 906 +4	340 434	45 61 -26	71 63 +13	703 839 -16	--	9 1 +900	--	0 0 -	0 0 -	
UK	58 62 -6	32 38 -22	179 155 +15	NA	29 22 +32	0 0 -	--	--	0 0 -	0 0 -	
IRL	--	--	--	--	--	--	--	--	--	--	
DK	410 466 -12	25 27 -7	28 29 -3	5 5 -	39 35 -29	0 0 -	2 0 +200	--	--	0 0 -	
GR	45 88 -49	3 0 +300	5 8 -37	9 8 +13	0 0 -	0 0 -	0 0 -	--	0 0 -	--	
TOTAL	12780 12977 -1.5	14298 14699 -2.7	12432 12706 -2.2	4273 4393 -2.7	10774 9893 +8.9	4006 4713 -15.0	801 719 +11.4	--	891 1007 -11.5	135 159 -15.1	60390 61266 -1.4

4.2.2. The relative importance of bilateral flows in 1983
(ingoing, except UK)

The results for 1983 are summarized in table 4.2.

Table 4.2

Member State	Tonnage	Share in %	Tonnage change in % 1983/1982
D	12 780	21.2	- 1.5
F	14 298	23.7	- 2.7
I	12 432	20.6	- 2.2
NL	4 273	7.1	- 2.7
B	10 774	17.8	+ 8.9
L	4 006	6.6	- 15.0
UK	801	1.3	+ 11.4
IRL	-	-	-
DK	891	1.5	- 11.5
GR	135	0.2	- 15.1
EUR-10	60 390	100.0	- 1.4

On the three main traffic flows (F,D,I), the drop of tonnage was slightly above average. This was offset by the boom of the Belgian figure, which was mainly due to a significant increase of traffic with France and Germany.

4.3. Share of rail transport in total transport of goods between Member States

For a number of years rail transport of goods has suffered from a tendency to lose market share, mainly to the benefit of road transport.

Notwithstanding an improvement in the economic climate taking place since the second semester of 1983, this tendency has not been halted.

<u>Year</u>	<u>Share of rail</u>
1980	18.0%
1981	16.6%
1982	14.9%
1983	14.1%

4.4. NST Categories

The breakdown by NST chapters is not yet available from the Statistical Directive; so in order to get an idea of the variations within NST chapters, other sources have been used. Data for 1983 is partially estimated.

Analysis of the data per NST-category indicates that the turnover of rail transport is based on a restricted number of NST-categories, which have suffered more than proportionally from the recession and are coping with structural difficulties (See Table 4.2.).

Table 4.3. Breakdown by main N.S.T. Chapter (mio tonnes)

	NST 2	NST 4	NST 5	NST 9	Re- mainder	Total
1980	12.9	15.4	15.6	12.3	22.3	78.6
1981	11.1	12.6	14.2	12.2	20.3	70.2
1982	8.8	9.5	12.2	12.0	18.8	61.3
1983	7.8	9.2	11.7	13.0	18.7	60.4
1983 on 1980 changes						
mio tonnes	- 5	- 6	- 4	+ 1	- 4	- 18.2
%	- 40	-40	-25	+ 6	-16	- 23.2
1983 on 1982 changes						
mio tonnes	- 1	0	- 1	+ 1	0	- 1
%	- 11	- 3	- 4	+ 8	- 1	- 1.4

Table 4.3. shows the large decline in the volume of goods transported (except in NST 9) between 1980 and 1983. NST 2 and 4 declined by about the same percentage, well above the average, and were major components of the total fall in traffic while NST 5 declined by just above the average. NST 9 on the other hand, while declining marginally in each of the first three years, showed a substantial rise in 1983. The other NST groups covered by "Remainder" showed a below average decline over the four years although the change in individual NST chapters included in this group varied considerably.

NST 2 = coal

NST 4 = ores and metal waste

NST 5 = metal products

NST 9 = machinery, transport equipment, manufactured products and miscellaneous articles).

Table 4.3. Relative importance of NST-categories in total rail transport (%)

	NST 2	NST 4	NST 5	NST 9	Remainder
1980	16.4	19.6	20.0	15.7	28.3
1981	15.6	18.0	20.3	17.4	28.7
1982	14.1	15.6	20.0	19.6	30.7
1983	12.8	15.3	18.4	23.4	30.1

SPAIN AND PORTUGAL

4.5 In the context of the negotiations with Spain and Portugal for accession to the Community, the following table shows the volume of rail traffic from EUR-10 to these two countries.

Table 4.9. Tonnages transported by EUR-10 to and from Spain and Portugal - 1982 - (in Mio tonnes)

Member State	Spain				Portugal			
	to S	from S	Total	%	to P	from P	Total	%
D	207	303	510	42	30	6	36	29
F	95	291	386	32	49	12	61	49
I	33	19	52	4	22	2	24	19
NL	9	61	70	6	2	0	2	2
B	57	118	175	15	1	0	1	1
L	1	1	2	0	1	0	1	1
UK	-	-	-	-	-	-	-	-
IRL	-	-	-	-	-	-	-	-
DK	0	13	13	1	0	0	0	0
GR	0	1	1	0	0	0	0	0
EUR-10	402	807	1209	100	105	20	125	101

Although the volumes are small, over 70% of the traffic to and from both countries is accounted for by Germany and France.

4.6. Railway Price Indices

4.6.1. Coverage

Price surveys are now being carried out in Germany, France, Italy and Belgium. The four railways agreed on the method of a "basket" of representative commodities defined for each directed relation from actual traffic data for the reference period (1981).

S.N.C.F. have applied the method on the France-Germany, France-Italy, France-Belgium and recently on France-Netherlands links. DB have applied the method on Germany-Belgium and Germany-Netherlands links. FS on Italy-France and SNCB on Belgium-Netherlands links. NS will join the experiment during 1984.

4.6.2. Price Developments by Relation

The quarterly data are now being published in the Market Development reports (for the first time in Report N° 8), taking 31 December 1981 as 100. Using quarterly data a geometric average has been calculated for the year 1983 and the results for the various relations are as follows:

	F/I	F/D	F/B	F/NL	I/F	D/F	D/B	D/NL	B/NL
31.12.81	100	100	100	100	100	100	100	100	100
Index for 1983	128	114	117	115	124	113	110	110	114

The largest increases were on the links F/I and I/F while the lowest was on D/B and D/NL.

The first quarter of 1983 saw substantial increases (in excess of 4%) over the previous quarter on all relations except F/B, F/NL and D/B but the single largest increase from one quarter to another was in the fourth quarter on the link F/B. As the data builds up and is extended it will provide an even more valuable guide to price movements.

CHAPTER 5

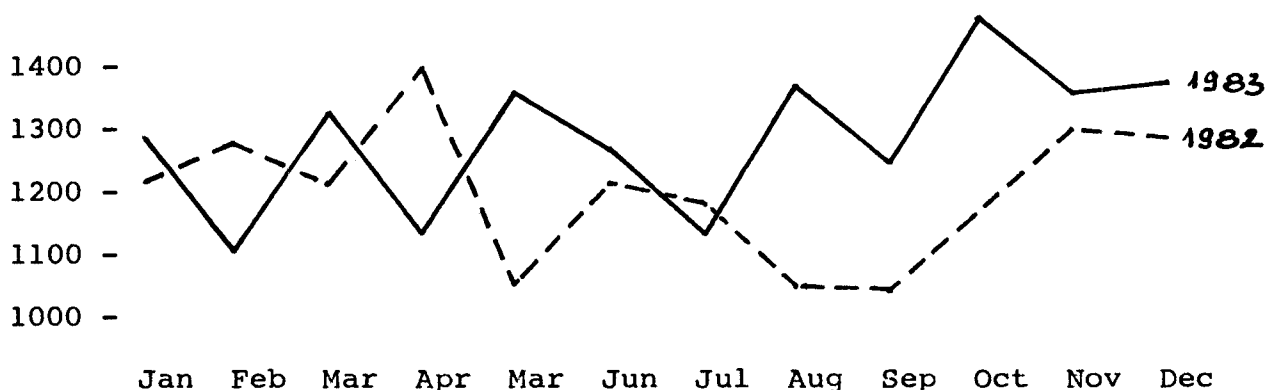
COMBINED TRANSPORT

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 ferrou-tage) for the piggy-back traffic.

5.1. Container Transport

After dropping for two years, results for 1983 showed an increase of 5.9% compared to the total for 1982, with 760,685 TEU*) being transported in 1983, against 718,515 TEU in 1982, but still below the 1981 figure.

Figure 5.1. Monthly traffic (comparison 1982-1983)



In the last quarter of 1983 traffic peaked at 203,017 TEU (9,7% higher than the same period of 1982, with 71,950 TEU in October which was the best figure of the year).

Table 5.1. Proportion of the total traffic (%)

Year	Maritime Container Traffic	Continental Traffic	U.K. +IRE-LAND	USSR	Total in TEU
1981	59.6	32.0	5.3	3.1	783,755
1982	59.1	34.1	4.7	2.1	718,515
1983	58.4	34.8	4.2	2.6	760,685

*) TEU = twenty foot equivalent unit.

Maritime container traffic to and from the European container ports with 444,444 TEU still represents the highest proportion of total traffic, but the percentage is dropping steadily as shown in table 5.1.

The Continental or inner European traffic (with 264,738 TEU) increased by 0.6% and, with the USSR sector, is the only one to show an improvement. The direct traffic with UK + IRELAND (31,479 TEU) and the container traffic overland between the Community and USSR for the transsiberian route (20,024 TEU) share the lowest percentage.

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

Year	Maritime Container Traffic		Conti- nental Traffic		U.K. + IRELAND		USSR		Total	
	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
1983	76.5	23.5	58.8	41.2	98.6	1.4	87.9	12.1	71.6	28.4

L = Loaded
E = Empty

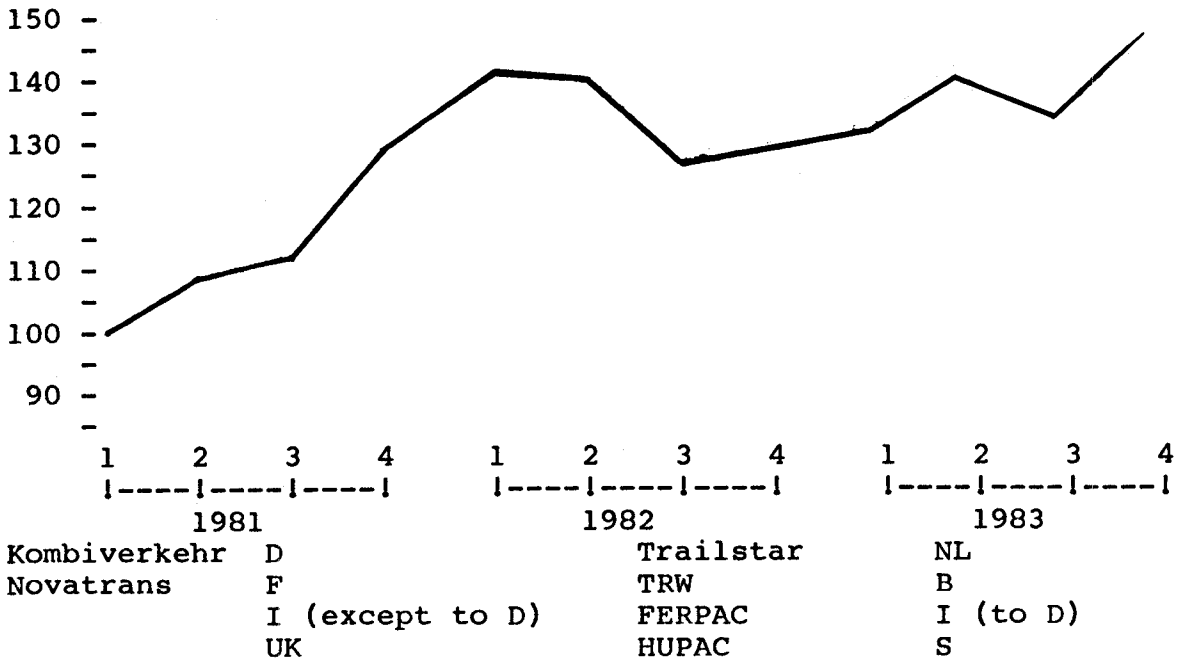
Compared to the previous year, the overall percentage of loaded containers has improved. The continental sector has the highest share of empty containers (41.2%) while UK + IRELAND enjoy the highest percentage of loaded containers.

One of the major problems in analysing "piggy back" transport is the lack of detailed data, showing for example the true origin and destination of traffic, the breakdown by type of unit - full lorry, trailer, swap body etc., weight and type of goods. For this reason the analysis of the variations on the different links and the reason for them is difficult to make.

5.2. Piggy-back Transport

The data are based on the number of units despatched by the "organizing" company, i.e. the number of semi-trailers, swap bodies or road trains etc. carried by rail wagons.

Figure 5.2.



Although 1983 shows an increase of 4% over the 1982 total, this was achieved principally by high figures in the second and the last quarter of the year. Thus the first quarter of 1983 was 10% lower than the same quarter of 1982, but the last quarter was 21% higher than the fourth quarter of 1982.

Experience varies considerably from one company to another. The company dealing with the largest number of countries is Kombiverkehr and in 1983 achieved a 40% share of the total number of units shipped, this represented an 8% increase over 1982.

Novatrans, trading in France, Italy and the United Kingdom, due to steadily dropping figures from quarter to quarter, registered a 9% decrease from 1982. TRW (traffic via Germany) has the most positive figures showing an increase of 93% over the 1982 total.

Table 5.3.: International Piggy-back Traffic 1983
(% change from previous year in brackets)

ORIGIN	DESTINATION	D	F	I	NL	B	UK	GR	EUR 10	ESP	A	YUG	SUI	TOTAL
D (Kombiverkehr)			255 (59)	24429 (13)	734 (-18)	884 (321)			26302 (12)	9033 (-8)	3822 (83)	819 (-15)	13991 (1)	53967 (8)
F (Novatrans)		2256 (-38)		6765 —	4 (-87)	810 (-17)	52 (-50)		9887 (-14)	312 (1056)				10199 (-12)
I (Novatrans)			6099 (-5)			6937 (-2)	5244 (-18)		18280 (-8)					18280 (-8)
UK (Novatrans)			62 (-28)	4579 (-15)					4641 (-15)					4641 (-15)
NL (Trailstar)		716 (-14)	2 (-60)	4394 (16)					5112 (10)		123 (-26)		216 —	5451 (-9)
B (TRW via France)			469 (-24)	8151 (-1)					8620 (-3)	2013 (17)				10633 —
B (TRW via Germany)		1084 (416)		280 (36)					1364 (228)		851 (21)		13 (-68)	2228 (-93)
I (FERPAC)		8936 (6)							8936 (6)					8936 (6)
S ex ITALY (HUPAC)		19097 (27)							19097 (27)					19097 (27)
S ex Suisse (HUPAC)		8618 (-13)							8618 (-13)					8618 (-13)
1983		40707	6887	48598	738	8631	5296	--	110857	11358	4796	819	14220	142050
1982*		38141	11811	46101	892	7891	6491	475	111802	7077	2956	961	14137	136933

* revised figures.

ORGANISATIONS UNDERTAKING SURVEYS

(a) Road Opinion Survey

B Institut du Transport routier
DK Danmarks Statistik
D IFO (Institut für Wirtschaftsforschung)
F Centre de Productivité des Transports
GR Ethniki Statistiki Ypiresia (National Statistical Office)
IRL University College, Dublin
I Centro Studi sui Sistemi di Trasporto
L Service central de la Statistique et des Etudes économiques
NL Economisch Bureau voor het Weg- en Watervervoer
UK Department of Transport

(b) Road Cost Survey

D Bundesverband des Deutschen Güterfernverkehrs (BDF) e.V.
F Comité national routier
NL Economisch Bureau voor het Weg- en Watervervoer
B Instituut voor Wegtransport
L Fédération des Commerçants du Grand-Duché
UK Road Haulage Association Ltd.
DK Landsforeningerne Danske Vongmaend

(c) Road Price Survey

B Institut du Transport routier
D BÄG (Bundesanstalt für den Güterfernverkehr)
F Ministère des Transports
I Centro Studi sui Sistemi di Trasporto
L Ministère des Transports
NL NIWO (Nederlandsche Internationale Wegvervoer Organisatie)
CBS (Centraal Bureau voor de Statistiek)

(d) Inland Waterway Opinion Survey

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

(e) Inland Waterway Cost Survey

NL Economisch Bureau voor het Weg- en Watervervoer
in collaboration with
F Office National de la Navigation
B Institut pour le Transport par Batellerie
D Bundesverband der deutschen Binnenschiffahrt

(f) Rail Price Indices

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

(g) Combined Transport

Intercontainer (container transport)
Interunit (piggyback transport)

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