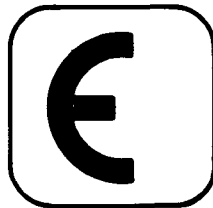


EUROPA TRANSPORT



OBSERVATION OF THE TRANSPORT MARKETS

MARKET DEVELOPMENTS



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MARKET DEVELOPMENTS

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PRESENTATION OF THE REPORT

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

- Analysis and Forecasts
- Annual Report
- Market Developments.

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

- recent developments in the goods transport market between Member States by road, rail and inland waterway;
- the results of quarterly opinion surveys carried out among international road hauliers;
- the results of quarterly price surveys carried out among international road hauliers;
- the results of quarterly opinion surveys among inland waterway operators on two international networks, i.e. the Rhine and the North/South (North/South being inland waterway flows between the Netherlands, Belgium, and France but excluding traffic via the Rhine).

The surveys are undertaken by:

(a) Road Opinion Survey

- B Institut du Transport Routier
- DK Danmarks Statistik
- D IFO (Institut für Wirtschaftsforschung)
- F Centre de Productivité des Transports
- GR 'Εθνική Στατιστική 'Υπηρεσία
- IRL Central Statistical Office
- I Centro Studi sui Sistemi di Trasporto
- L Service central de la Statistique et des Etudes Economiques
- NL Economisch Bureau voor het Weg- en Watervervoer
- UK Department of Transport.

(b) Road Price Survey

- B Institut du Transport Routier
- D BAG (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).

(c) 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.

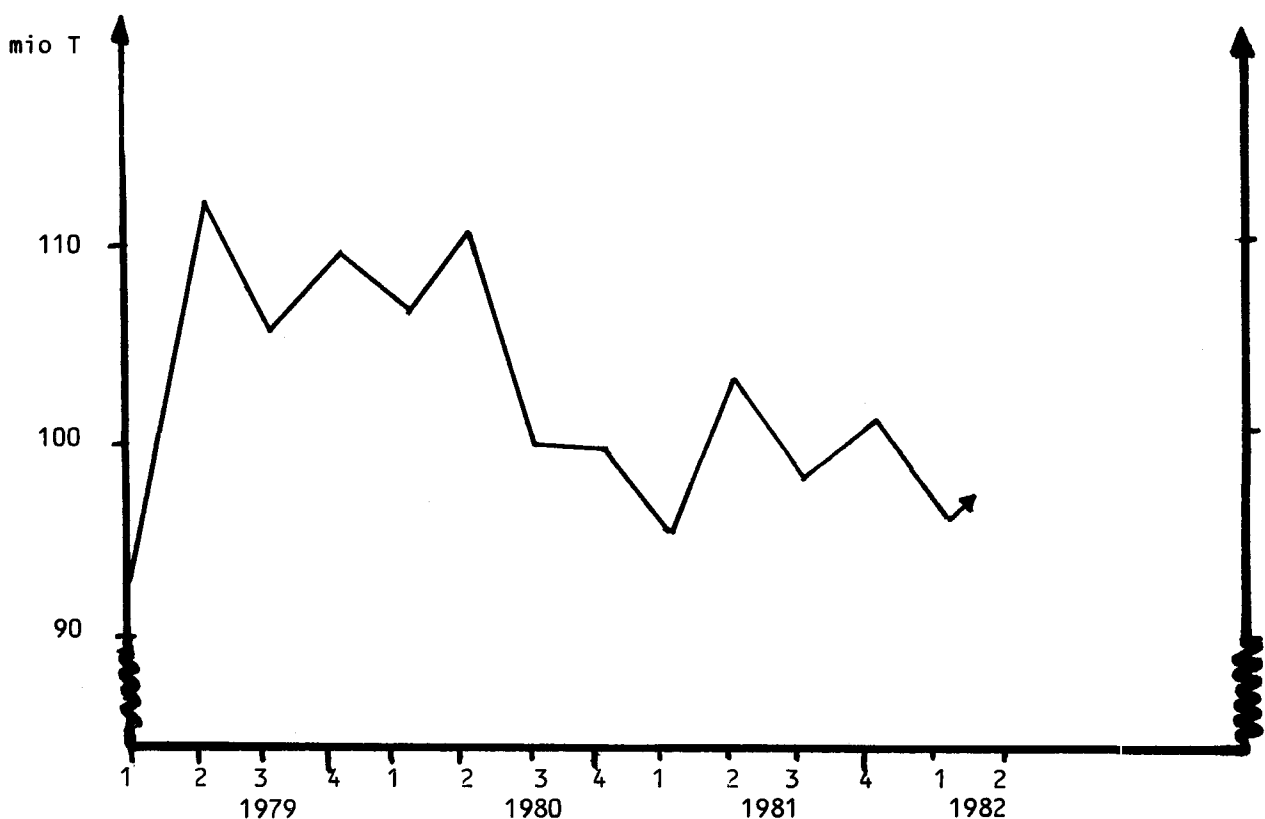
SECTION 1: GENERAL SUMMARY

The general recession in international freight transport between Member States in the third quarter 1980 and continued into the third quarter 1981. The recovery noted in the fourth quarter 1981 slowed down in the first quarter 1982. Road transport continued to grow at a very moderate rate, while waterway traffic was stagnant. Rail traffic continued to fall, but the fall was the smallest for some time.

The Road Transporter Inquiry Surveys indicate that the expected upturn of activity has not materialized and prices remain depressed. Waterway operators on both the Rhine and the North/South report that the market remains at a stable but rather low level with weak prices.

There seems little prospect of an early upturn of the market and a traditionally weak third quarter is expected.

Figure 1.1: Total international inland tonnage between Member States: 3 modes.
(United Kingdom, Ireland and Greece not included)



SECTION 2: GENERAL MARKET ASSESSMENT

2.1. The slow, painful, but gradual recovery in international transport movements between Member States hiccupped during the first quarter of 1982. Throughout 1981 the quarterly growth rates for each of the three modes of transport steadily improved, but during the first quarter 1982 that improvement for road and inland waterways turned downwards again. Table 2.1. shows the basic statistics relating to the first quarter.

Table 2.1.: International EUR-7 (1) in million tonnes (2)

	Q1 1982	Q1 1981	% change	Modal share Q1 1982
Road	37.11	36.05	+ 2.9	38.4
Rail	17.22	17.69	- 2.7	17.8
I.W.	42.24	42.21	+ 0.1	43.8
Total	96.57	95.95	+ 0.6	100.0

2.1.1. The question now to be answered is whether this hiccup in the recovery, and it must be remembered that the total growth was still very slightly positive, was perhaps no more than the effect of a harder than average winter on international transport movements. Indicators and results that are available for the second quarter, however, are not very encouraging. With regard to road, the overall balance of opinion resulting from the surveys carried out among road hauliers in each of the Member States (see section 3.1) shows a decrease of 2 percentage points in comparison with the first quarter.

(1) EUR-7 refers to Germany, France, Italy, the Netherlands, Denmark and the Belgian/Luxembourg Economic Unit.

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

One would usually expect an increase during the second quarter of between 5 and 10 points due to seasonality. Their forecasts for the third quarter are equally pessimistic. Inland waterway Opinion Survey results on the Rhine and North/South (see Section 4) are also not very optimistic about developments in their market during the first nine months of this year. Partial railway statistics that are available for the second quarter indicate at best no more than a seasonal increase on the first quarter. Economic indicators of developments in key industrial sectors requiring large tonnage movements, i.e. steel production, coal deliveries, petroleum consumption and electric energy production, all show a stagnation in demand. However, it is believed to be the stagnation in these heavy industries which is causing difficulties to international transport operators. On relations which are not dominated by these industries, normally long distance small volume flows, some substantial growth rates have been recorded.

Finally, as mentioned above, the winter of 1981-82 was harder than the previous year, and this will have had some effect on transport volumes, in particular NST 6 (1) by road and inland waterway. As in previous hard winters (i.e. 1978-79), rail market share has benefitted substantially.

2.1.2. As shown in table 2.1, the modal share of EUR-7 traffic flows was 38.4, 17.8 and 43.8 for road, rail and inland waterways respectively. This means that rail, traditionally strongest during the first quarter, improved its modal share by 1.9 from 15.9 in the last quarter of 1981. Compared to the first quarter of 1981, however, road market share has increased by 0.8 from 37.6 mainly at the expense of rail, whose market share has fallen by 0.6 from 18.4.

2.2. Road

2.2.1. Rather surprisingly, international EUR-7 road tonnage only grew by 2.9% during Q1 1982. During the last quarter of 1981 it grew by 4.2% and seemed out of recession, and, further, Q1 1981 (with which it is being compared) was bad, at - 8.3%. Q1 1982 road haulage was still 5.6% down on Q1 1980.

(1) NST goods classifications are given on p. 12.

- 2.2.2. Most EUR-7 unilateral flows recorded positive growth rates, the only exceptions being $F \rightarrow D$, $D \rightarrow NL$, $UEBL \rightarrow NL$ and $B+L \rightarrow I$. What is noticeable is that, in general, it is the relations with heavy traffic volumes that are slowest to recover and grow. The four flows mentioned above that remained negative account for 25% of the total intra-Community road tonnage. On the other hand, all bilateral flows with Denmark were positive. The average growth rate for these flows, which in tonnage terms are not very important at 4% of the total Community international road traffic, was + 9%.
- 2.2.3. Besides the Danish traffic already mentioned, other generalizations on the positive side were: all flows out of the Netherlands (+ 4%) and Italy (+ 9%) and all into Belgium/Luxembourg (+ 5%) and France (+ 6%). The Dutch outward flows appear mainly to be general market improvement, but with a large increase in fertilizers to France. The Italian outward flows are mainly due to agricultural products. The Belgian and French inward flows were, in general, just more healthy.
- 2.2.4. Reasons for the negative results on the four relations were, in summary, as follows: $F \rightarrow D$, NST 0, 3, 6, 8 and 9 all showed downward trends. $D \rightarrow NL$ was hit by a particularly large fall in NST 2, shipments of which were down 36%; NST 6 was also significantly down, and increases in NST 0, 1, 8 and 9 were not enough to compensate. $B+L \rightarrow NL$ recorded a large fall in the dominant market goods category, NST 6; significant growth in NST 3 and 7 stopped the result from being worse.

2.3. Rail

- 2.3.1. International EUR-7 rail goods traffic during the first quarter 1982 recorded its least negative growth rate (-2.7%) since the second quarter 1980. We have to go back two years to the first quarter of 1980 to find a positive growth rate.
- 2.3.2. General patterns that are easily identifiable during the first quarter 1982 were not easy to find. The only identifiable common denominator being all flows into Denmark positive, with an average increase of 14%.

It can also be stated that international rail flows with Germany were bad, down nearly 10%. All flows out of Germany, except with Denmark, were negative. The best overall results were recorded for flows with Belgium/Luxembourg, where both total outward and inward tonnage were up 4%. Total traffic flows involving France balanced out, with inwards up about 1.2% and the more important outwards traffic, in tonnage terms, down 0.5%.

2.3.3. Due to lack of data of rail flows between Member States broken down by NST chapters, analysis of developments is only possible in relations involving France. On $F \rightarrow B+L$, rail traffic increased by 8.2% due to large increases in NST 0 and 4. Traffic from the Netherlands to France, a small tonnage relation, increased 20% due to NST 2 shipments, almost trebling. On the other hand, it was NST 2 shipments from Germany to France falling at 20% that caused the 9% decrease on this flow, NST 2 accounting for nearly 60% of the total tonnage on $D \rightarrow F$. In the other direction, $F \rightarrow D$, there was a 10% fall in total tonnage on a basically weak market, but particularly due to NST 0 and 4. Finally, traffic from Italy to France increased 46%, mostly due to an 84% increase in NST 5, which now accounts for over 50% of the tonnage on this flow.

2.3.4. Developments since the end of the first quarter indicate that rail traffic is stable. Belgium/Luxembourg traffic looks positive, whilst German rail traffic appears still negative. French rail flows are showing some positive growth, in particular with the Netherlands, whilst Franco-German flows remain very depressed.

2.4. Inland Waterways

2.4.1. The total tonnage shipped by inland waterways during the first quarter 1982 was at the same low level as the corresponding period of 1981. At the individual relations level, however, the situation was highly volatile, and no consistent patterns to or from individual Member States could be discerned. It can be said that a bad total result for inland waterway traffic was only averted by large positive growth on the most important traffic flow in tonnage terms, i.e. the Netherlands to Germany relation, which increased by around 12%.

2.4.2. Looking at inland waterway bilateral flows, the following three relations emerge in terms of being clearly positive or negative:

Franco-German traffic down (- 11%)

Belgo/Luxembourg-Dutch traffic down (- 19%)

Franco-Dutch traffic up (+ 17%).

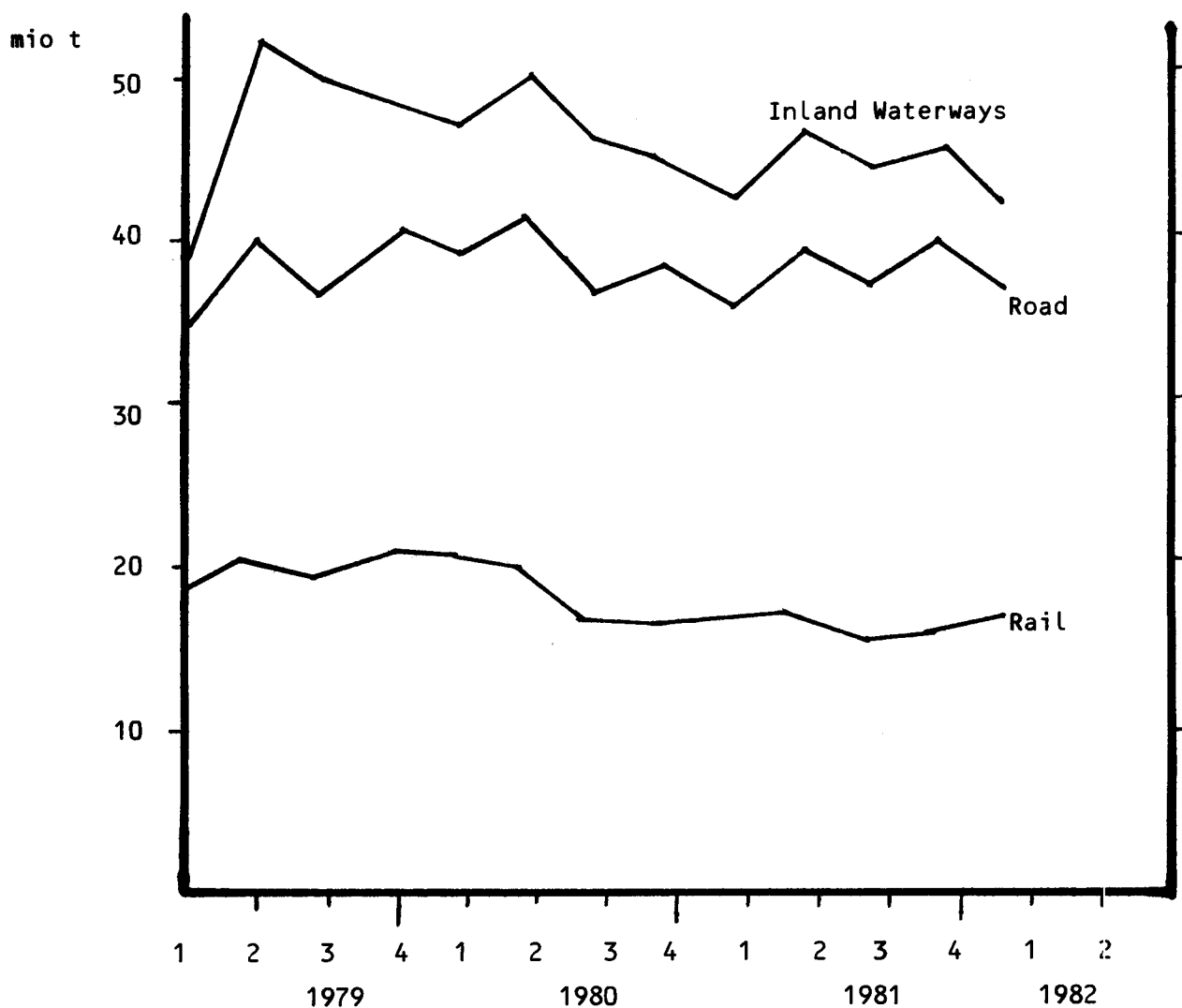
In the direction D → F there was only a fall of 2% and the market situation was stable. In the other direction, F → D, which carries four times the tonnage of D → F, the recorded fall in traffic of 13% was due to large decreases in NST 1 (down 60%) and 3 (down 40%); NST 6 also fell (5%), but increased its share of the total market to 64%.

Traffic falls on B+L → NL were due to decreases in NST 0, 3 and 6 and in the other direction NST 3 and 6 fell significantly.

Despite falls in the transport of NST 0 and 1 from the Netherlands to France, increases in the important waterways goods categories of NST 2, 4 and 5 saw the tonnage on this flow rise by 16%. In the other direction, F → NL, it was significant increases in NST 0 and 1 which were responsible for a 19% rise in this traffic.

2.4.3. As already mentioned, traffic on the Rhine from the Netherlands to Germany was up about 12% compared with Q1 1981. In the other direction the traffic was down about 11%. The increase in traffic from the Netherlands to Germany was a continuation of the market revival that had occurred during the last quarter of 1981. This revival is most marked in the traditionally important inland waterway goods categories, namely NST 2, 3, 4 and 5, which all rose in tonnage significantly. In the other direction, despite an increase in agricultural products, all other categories of goods recorded a lower tonnage movement, in particular, NST 2 and the very important NST 6.

Figure 2.1: Traffic between Member States by mode in million tonnes.
(United Kingdom, Ireland and Greece excluded)



2.5. Traffic involving the United Kingdom, Ireland and Greece

2.5.1. United Kingdom

The first quarter of 1982 was remarkable in terms of the large increase in ro-ro traffic. Driver-accompanied vehicles through UK ports were 13% up on the corresponding period of 1981. Furthermore, the 84.000 driver-accompanied vehicles were only 3.5% lower than the fourth quarter 1981. Normal seasonality would usually double this and so it can be stated that there was a high level of activity. There is, however, certain evidence that empty running was significantly higher and that although rates had improved, they were not satisfactory.

The recent trend towards greater penetration of the UK market by non-UK hauliers continued, with French registered vehicles up from 11.900 in Q1 1981 to 15.200 in Q1 1982. French vehicles now account for 18% of the total UK ro-ro market, whilst the UK share is down from 57 to 53%. (This total includes third country flows; about 6% of the road traffic out of the UK).

From the statistics that are available, it appears that the positive trend in volume movements has continued through the second quarter of 1982. Road haulage units through Dover are up 27%, with ro-ro tonnage up 18%. Again this indicates a further increase in empty running. French Channel ro-ro ports are reporting good figures, although Calais was significantly down in June.

Despite several disruptions of the railways in the United Kingdom by railway workers industrial action, train-ferry traffic has held up remarkably well. At the end of the first quarter 1982, the total inward and outward traffic at 237.000 tonnes was at a similar level to that of the corresponding period in 1981 and on schedule to reach 1 million tonnes for the year. The most important points of Community origin and destination are France, Germany and especially Italy.

2.5.2. Ireland

Compared with the first quarter of 1981 Irish international road hauliers registered some growth in dry goods haulage during the first quarter of this year. The meat market, however, continued its decline such that it is now estimated to constitute about 40% of the total; this compares with about 70% in Q4 1980.

Because of this change in the basic structure of the market, a large number of Irish hauliers, who were solely dependent on the meat trade, have diversified into other goods categories. As a consequence, the number of refrigerated units has more than halved since 1979, down from 700 to around 300, despite an increase in the transport of frozen fish.

There is also evidence that ro-ro market share expansion has ceased for the present. In fact, a slight increase in lo-lo (1) movements has been detected. At the same time, ro-ro capacity on the direct link from Ireland to mainland Europe has been increased. A combination of these two factors, plus a certain amount of disruption on the Irish Sea routes has led to a large fall in the number of Irish hauliers transitting the United Kingdom, down from 2.100 vehicles in Q1 1981 to 1.300 in Q1 1982.

2.5.3. Greece

First quarter 1982 Greek statistics show a continuing development of the market following its accession to the Community.

International road haulage between Greece and the rest of the Community reached 317.000 tonnes. Traffic to and from Germany, which accounts for over half the market, grew strongly, particularly exports which advanced by over 30%. Greek hauliers have done particularly well in increasing their share of the German market. The boost in exports is due, at least in part, to a bumper crop of oranges.

Rail traffic at 54.000 tonnes showed a marginal fall from the same quarter of 1981, but whereas imports advanced from 37.600 to 42.500 tonnes, exports slumped from 18.300 tonnes to 11.600 tonnes, principally due to a fall in exports to Germany from 15.600 to 9.200 tonnes.

NST CLASSIFICATION

- NST 0 - Agricultural products and live animals.
- NST 1 - Foodstuffs and animal fodder.
- NST 2 - Solid mineral fuels.
- NST 3 - Petroleum products.
- NST 4 - Ores and metal waste.
- NST 5 - Metal products.
- NST 6 - Crude and manufactured minerals, building materials.
- NST 7 - Fertilizers.
- NST 8 - Chemicals.
- NST 9 - Machinery, transport equipment, manufactured articles and miscellaneous articles.

(1) lo-lo = lift on - lift off.

SECTION 3: ROAD HAULIER SURVEYS

The extension of the work on price indices to six Member States permits its inclusion in the Quarterly Report for the first time, although a more detailed analysis of price trends during 1980 and 1981 is given in the Annual Report for 1981.

The analysis of the opinion surveys presented in earlier editions of this Quarterly Report is continued.

3.1. Opinion Surveys

The general market situation for international road hauliers can be considered satisfactory even if the activity level has not developed as foreseen.

3.1.2. Activity indicators (Figure 3.1)

With regard to the results of transport activity, the survey on the second quarter 1982 gives, for all hauliers interviewed, an overall balance of opinion (percentage difference between the replies increase (+) and decrease (-)) of - 8%, or a drop of 2 points in comparison to the first quarter 1982.

The activity level has been deemed lower by the small and medium-size firms and stable by the large firms. By Member State, in the United Kingdom, and, in particular, in Greece this decrease in activity has been the most marked. On the other hand, in Belgium there has been an upswing in transport activity.

A more detailed analysis shows that this slight fall-back in total activity is due to the bad results recorded by the Greek hauliers and that if these results are excluded, the activity level for the rest of the Community hauliers is at the same level as that for the previous quarter.

This situation, which had not been foreseen, should be considered as an extension of the pause noted during the first quarter 1982 and not as the beginning of a new recession.

Looking at the results recorded during the last four quarters with regard to activity, it appears that the opinions for the fourth quarter 1981 were rather optimistic, which has overstated the upturn and that those for the second quarter 1982 seem pessimistic in comparison with the other indicators, due to the fact that the effects of the upswing have been late in coming to fruition.

This feeling of pessimism could equally have led the hauliers interviewed to forecast for the third quarter 1982 a more severe decrease in activity than that which should normally be expected for the period.

The percentage of firms who have stated having had a bad utilization of their rolling stock stayed the same as that for the previous quarter (20%). It is then noted that 40% of firms (against 36% during the first quarter 1982) or + 4 points have had a very good and/or good utilization of their plant.

Expressed as an overall balance of opinion (percentage difference between replies of opposite opinions), it can be noted that during more than one year the utilization of rolling stock has progressively improved.

3.1.3. Economic indicators (Figure 3.2)

The total percentage of firms who have recruited drivers has increased by 1 point, reaching 15%. The upturn in recruitment has been specifically in medium-size firms (+ 1 point) and in particular in small firms (+ 2 points), whilst the recruitment in large firms has fallen back to 26% from 29%.

The conditions on the labour market are such that 79% of firms interviewed believe that recruitment is easy and/or normal. This percentage has decreased in comparison with the first quarter 1982, but remains slightly higher than the average of the previous quarters.

The total percentage of firms having had liquidity problems has decreased by 2 points from 53% to 51%. This result only reflects the average situation in the Community. In fact, with the exception of Italy (76% or + 4 points), and in particular Greece (76% or + 22 points), in all other Member States the percentage of firms having liquidity problems has decreased by a non-negligible amount from 4 to 9 points

It is in the medium-size firms that liquidity problems are the most pronounced (54%). The improvement noted this quarter is in large firms, where the percentage has decreased by 4 points in comparison with the first quarter 1982.

Given the present economic situation, the increase in investments made during the second quarter 1982 deserves to be mentioned. The total percentage of firms having made investments has, in fact, increased by 3 points, reaching 36%, which is the highest percentage recorded since the third quarter 1980.

Only Irish and Dutch hauliers have made less investments than during the previous quarter in percentage terms. Although the situation has remained unchanged in medium-size firms, small firms having made investments have increased by 3 points and large firms by 6 points.

The share in investments allocated to freight expansion and the share in replacement of rolling stock has decreased by 2 and 7 points respectively for the benefit of other investments for which the share is not 18%.

Forecasts for the third quarter 1982 indicate a status quo with the present situation.

National details are given in tables 3.3, 3.4 and 3.5.

Figure 3.1

INDICATORS OF ACTIVITY
Aggregate balance of opinions (inpercentage)

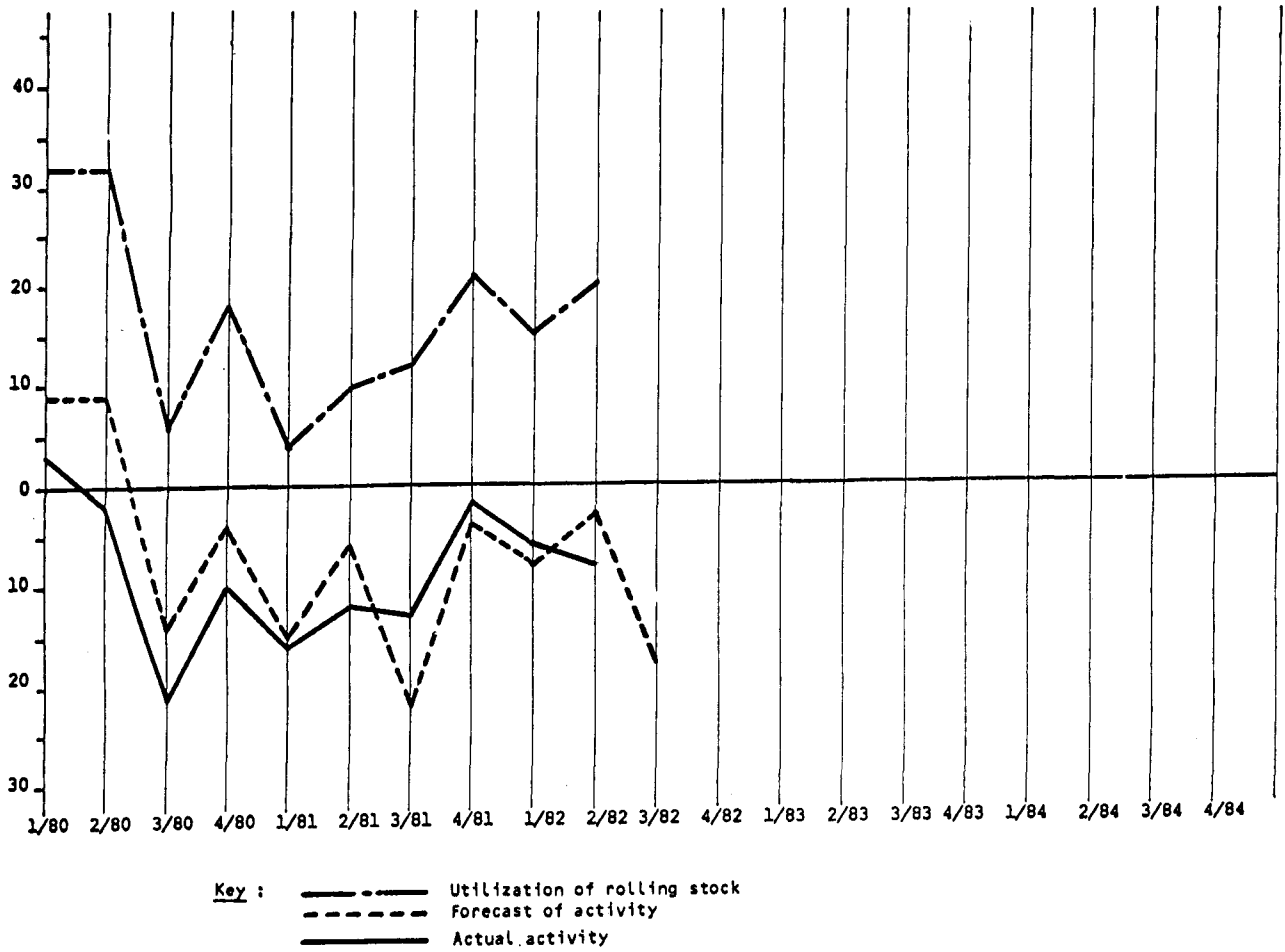


Figure 3.2

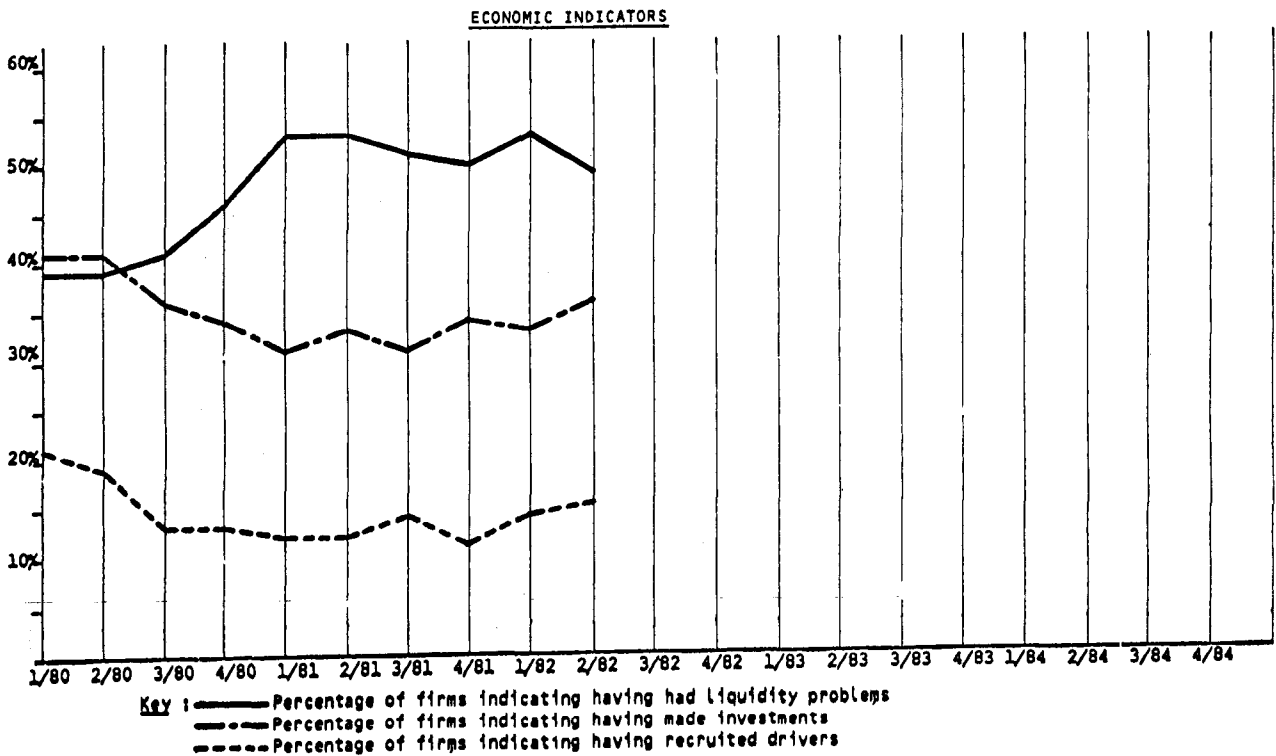


Table 3.1

INTERNATIONAL TRANSPORT BUSINESS ACTIVITY

		1980				1981				1982				1983				1984			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
BELGIQUE-BELGIE	+	29	27	19	25	25	28	22	31	28	31										
	=	48	50	39	47	46	41	43	44	48	51										
	-	23	23	42	28	29	31	35	25	24	18										
	\$	+6	+4	-23	-3	-4	-3	-13	+6	+4	+13	-20									
DANMARK	+	34	27	19	26	24	20	21	24	26	26										
	=	58	57	53	57	57	65	61	60	64	64	67									
	-	8	16	28	17	19	15	18	16	10	10										
	\$	+26	+11	-9	+9	+5	+5	+3	+8	+16	+16	-3									
DEUTSCHLAND	+	20	18	15	16	20	18	19	20	22	19										
	=	56	54	45	51	46	54	48	49	49	55	67									
	-	24	28	40	33	34	28	33	31	29	26	-15									
	\$	-4	-10	-25	-17	-14	-10	-14	-11	-7	-7										
FRANCE	+	29	22	18	14	16	14	16	22	17	14										
	=	49	51	50	49	41	48	48	46	48	50	55									
	-	22	27	32	37	43	38	36	32	35	36										
	\$	+7	-5	-14	-23	-27	-24	-20	-10	-18	-22	-29									
ΕΛΛΑΔΑ	+									27	16	14									
	=									47	45	31	31								
	-									26	39	55									
	\$								+1	-23	-41	-17									
IRELAND	+			42	25	18	24	21	25	21	27										
	=			34	47	29	47	40	40	48	39	55									
	-			24	28	53	29	39	35	31	34										
	\$			+18	-3	-34	-5	-18	-10	-10	-7	+7									
ITALIA	+	20	25	16	14	15	15	17	18	15	16										
	=	53	45	44	41	41	44	43	53	49	47	49									
	-	27	30	40	45	44	41	40	29	36	37										
	\$	-7	-5	-24	-31	-29	-26	-23	-11	-21	-21	-11									
LUXEMBOURG	+	23	21	13	26	25	26	12	25	28	26										
	=	61	66	44	44	46	51	51	62	48	50	54									
	-	16	13	43	30	29	23	37	13	24	24										
	\$	+7	+8	-30	-4	-4	+3	-25	+12	+4	+2	-12									
NEDERLAND	+	31	23	13	34	30	20	25	24	34	32										
	=	39	55	44	45	41	65	49	52	43	45	49									
	-	30	22	43	21	29	15	26	22	23	23										
	\$	+1	+1	-30	+13	+1	+5	-1	+4	+11	+9	-35									
UNITED KINGDOM	+				29	23	21	24	28	28	25										
	=				45	49	53	56	59	60	56	65									
	-				26	28	26	20	13	12	19										
	\$				+3	-5	-5	+4	+15	+6	+6	+11									
EEC	+	26	23	17	21	20	19	20	24	22	21										
	=	51	52	45	48	44	50	47	50	50	50	56									
	-	23	25	38	31	36	31	33	26	28	29										
	\$	+3	-2	-21	-10	-16	-12	-13	-2	-6	-8	-18									

Forecast ↑

Key :

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

Table 3.2

UTILIZATION OF ROLLING STOCK

- + : Percentage of firms indicating a very good and/or good utilization
 = : Percentage of firms indicating a normal utilization
 - : Percentage of firms indicating a bad utilization

		1980				1981				1982				1983				1984			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
BELGIQUE-BELGIE	+	51	52	31	32	28	33	31	40	41	55										
	=	36	37	41	47	48	46	51	46	43	35										
	-	13	11	28	21	24	21	18	14	16	10										
DANMARK	+	64	55	33	49	42	40	41	46	49	48										
	=	33	39	50	43	45	49	47	41	43	46										
	-	3	6	17	8	13	11	12	13	8	6										
DEUTSCHLAND	+	39	33	27	30	25	28	21	30	33	28										
	=	45	53	47	52	51	53	53	46	49	51										
	-	16	14	26	18	24	19	26	24	18	21										
FRANCE	+	28	49	35	43	36	37	44	46	29	43										
	=	54	29	34	23	20	26	25	25	34	23										
	-	18	22	31	34	44	37	31	29	37	34										
EMAAA	+								23	18	15										
	=								56	53	28										
	-								21	29	57										
IRELAND	+			57	63	28	30	31	36	34	30										
	=			33	22	40	40	38	35	37	40										
	-			10	15	32	30	31	29	29	30										
ITALIA	+	27	27	22	20	14	14	18	17	15	14										
	=	55	52	56	47	48	55	59	62	64	63										
	-	18	21	22	33	38	31	23	21	21	23										
LUXEMBOURG	+	59	58	45	40	28	37	28	28	18	22										
	=	39	36	45	58	58	56	58	65	75	67										
	-	2	6	10	2	14	7	14	7	7	11										
NEDERLAND	+	59	57	30	44	49	46	47	52	51	60										
	=	34	38	39	37	32	42	36	38	37	35										
	-	7	5	31	19	19	12	17	10	12	5										
UNITED KINGDOM	+				49	43	44	48	68	65	62										
	=				28	32	35	37	25	26	22										
	-				23	25	21	15	7	9	16										
EEC	+	44	45	31	39	32	33	34	39	36	40										
	=	44	42	44	40	40	44	44	41	43	40										
	-	12	13	25	21	28	23	22	20	21	20										

Table 3.3

RECRUITMENT OF DRIVERS

Percentage of firms indicating having recruited drivers

	1980				1981				1982				1983				1984			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
BELGIQUE-BELGIE	26	19	12	17	17	18	19	10	21	26										
DANMARK	21	19	14	13	12	8	17	7	14	20										
DEUTSCHLAND	13	7	5	3	5	3	4	2	5	5										
FRANCE	8	6	4	3	4	3	4	4	5	3										
EMAAA								40	36	24										
IRELAND			14	19	24	12	12	24	17	15										
ITALIA	32	32	27	26	22	29	28	22	21	24										
LUXEMBOURG	50	42	34	21	35	30	14	27	21	31										
NEDERLAND	36	32	16	19	15	19	14	11	18	19										
UNITED KINGDOM				17	12	10	19	25	21	19										
EEC	21	19	13	13	12	12	14	11	14	15										

Table 3.4

LIQUIDITY PROBLEMS

Percentage of firms indicating having had liquidity problems

	1980				1981				1982				1983				1984			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
BELGIQUE-BELGIE	26	25	27	29	27	39	28	32	32	27										
DANMARK	14	14	24	19	26	23	31	29	32	23										
DEUTSCHLAND	29	29	32	34	43	44	39	42	40	39										
FRANCE	52	54	53	61	67	66	64	61	64	60										
ΕΛΛΑΔΑ								63	54	76										
IRELAND			57	62	79	59	53	51	58	58										
ITALIA	49	57	53	64	65	72	70	70	72	76										
LUXEMBOURG	26	20	34	21	63	15	43	27	57	38										
NEDERLAND	20	16	23	17	19	16	18	15	18	12										
UNITED KINGDOM				58	64	57	57	51	56	49										
EEC	39	39	41	46	53	53	51	50	53	49										

Table 3.5

INVESTMENTS

Percentage of firms indicating having made investments

	1980				1981				1982				1983				1984			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
BELGIQUE-BELGIE	39	38	35	34	30	36	30	29	30	39										
DANMARK	57	49	43	32	35	39	44	40	43	45										
DEUTSCHLAND	42	45	35	34	32	28	32	30	27	35										
FRANCE	39	39	35	30	31	30	27	34	34	35										
ΕΛΛΑΔΑ								46	33	42										
IRELAND			38	46	28	27	30	29	25	22										
ITALIA	33	39	35	34	26	29	26	27	26	25										
LUXEMBOURG	50	42	32	26	17	22	21	33	26	29										
NEDERLAND	52	41	41	40	38	44	36	47	46	42										
UNITED KINGDOM				57	30	52	50	49	53	63										
EEC	41	41	36	34	31	33	31	34	33	36										

3.2. Price Surveys

3.2.1. Coverage

Surveys are now being carried out on prices in Germany, France, Italy, the Netherlands, Belgium and Luxembourg. The analysis relates to movements between these Member States; results for Belgium are from an earlier investigation based on inspectors' records. Data for German hauliers is taken from BAG publications, as German data has not yet been integrated into the central analysis. Due to changes in survey methodology, it is not yet possible to incorporate the French, Belgian and Luxembourg results for the first quarter of 1982.

3.2.2. Overall results by nationality of haulier

In 1981 average prices rose for hauliers in all Member States, but the rise was less than the inflation rate as measured by the retail price index in the Member State concerned. The deflated prices (average prices adjusted for changes in the retail price index) fell by about 5% in 1981 for hauliers from Germany, France, the Netherlands and Belgium, the four Member States for which data for the whole of 1981 is available.

Average prices continued to be weak in the first quarter of 1982. While average prices received by Italian and Dutch hauliers rose marginally (+ 2.8% and + 1.6% respectively) those of German hauliers apparently fell by 0.8%, but the decline in German prices may be due to seasonal change in traffic mix. The deflated prices, however, continue to be weak in the first quarter of 1982, with only Dutch hauliers recording a minor improvement (+ 0.4%), while Italian and German hauliers had falls of 1.2% and 2.3% respectively (although the latter figure may be exaggerated by the traffic mix changes as mentioned above).

The results are shown where possible from the beginning of 1980, in Figure 3.3.

3.2.3. Effect of changes in exchange rates

As one of the principal objectives of the analysis is to consider the development of prices by relation, it is evident, particularly from the user's point of view, that changes in exchange rates must be taken into account. This has been done by converting the average prices received by hauliers to EUA (European Unit of Account), using the average exchange rate for the period concerned - commercial (or official) rate in the case of Belgium/Luxembourg.

Figure 3.4, which again reproduces the development of prices by hauliers from each Member State, also shows the average prices received in terms of EUA. The results show that the development of prices in EUA (like the deflated prices in Figure 3.3) are much more comparable between Member States than the prices in national currencies.

The information in Figure 3.4 can also be used to adjust the results on the developments in prices by relation shown in Figures 3.5 and 3.6 (and described below) into currency units which are more familiar to a specific reader. Thus, for example

Germany/France, Fourth Quarter 1981

	Average prices (relative to Q1 1980 = 100)	
	German hauliers	French hauliers
in EUA	107.1	109.7
in DM	104.7	107.2
in FF	112.7	115.4

3.2.4. Developments in price by relation

Figure 3.5 shows the development of the average prices (in EUA) of German, French, Dutch and Belgian hauliers on the relations between these four Member States, while Figure 3.6 shows similar prices of Italian and partner country hauliers on the relations with Italy.

Due to the fact that data for hauliers from different Member States is available for different periods, it is most convenient at this stage to consider the results in terms of country of haulier. The Member States with results for the first quarter of 1982 will be discussed first.

German hauliers

Average prices on the relation with Italy have advanced steadily since the beginning of 1980, up 8.9% (in EUA) by the fourth quarter of 1981 and a further 1.1% in the first quarter of 1982. Average prices on relations with France and the Netherlands show similar patterns, with negligible changes in 1980 followed by a steady rise in 1981 and a fall of about 2.5% in the first quarter of 1982. Average prices on the relation with Belgium were unchanged in 1980 and 1981 (prices of Belgian hauliers were weak too), but advanced strongly by 3.5% in the first quarter of 1982.

Dutch hauliers

Average prices on all relations show similar trends when measured in EUAs. There were only marginal changes until the third quarter of 1981, followed by a sharp increase in the fourth quarter and a smaller increase in the first quarter of 1982. If, however, the results are expressed in Guilders, then prices on each relation show a slow but steady unspectacular growth. (Note that Dutch hauliers' data since the third quarter of 1981 on the relation with Belgium has not been analysed due to the late arrival of the data; it will be incorporated later).

Italian hauliers

Average prices on relations with Germany and the Netherlands (strong currency countries) have similar patterns, a fall in the fourth quarter of 1981 (when expressed in EUA - virtually unchanged if expressed in LIT), followed by stability in the first quarter of 1982.

Average prices on relations with France and Belgium (weak currency countries) have some similarities, a fall in the fourth quarter (at least in EUA) followed by a sharp recovery in the first quarter of 1982. However, the relative size of the falls and the recoveries are different, leaving average prices 3.3% up in the case of the relation with France, but 5.6% down in the case of the relation with Belgium.

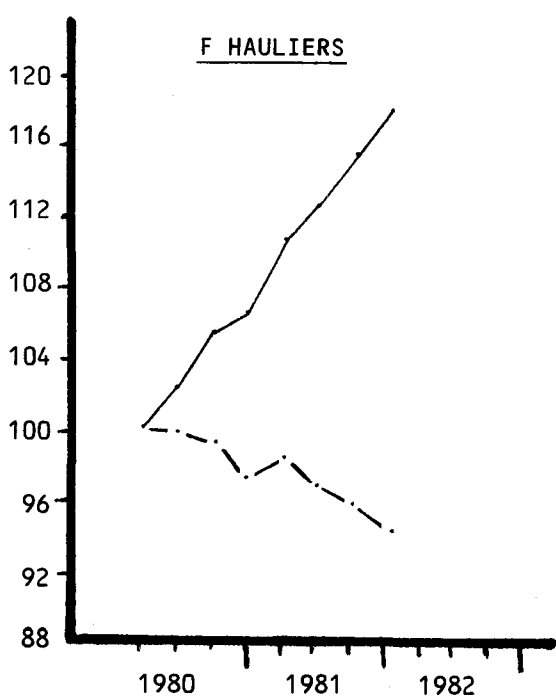
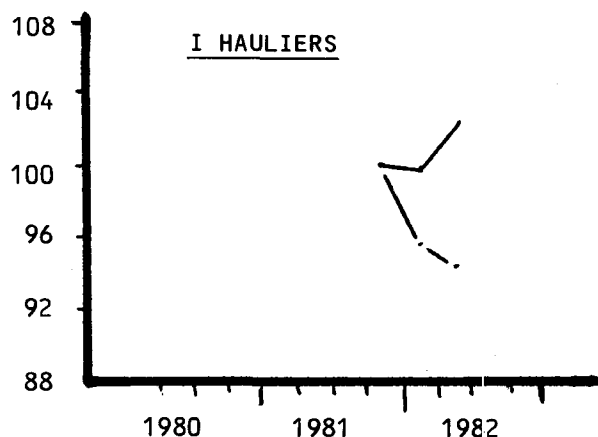
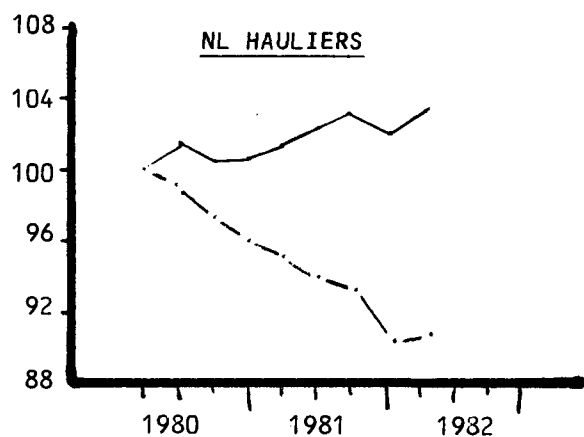
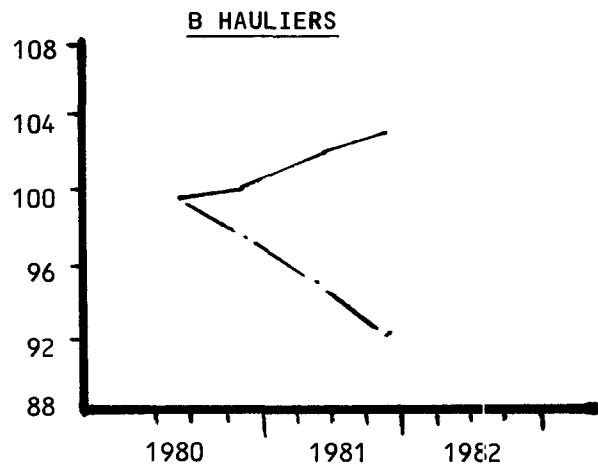
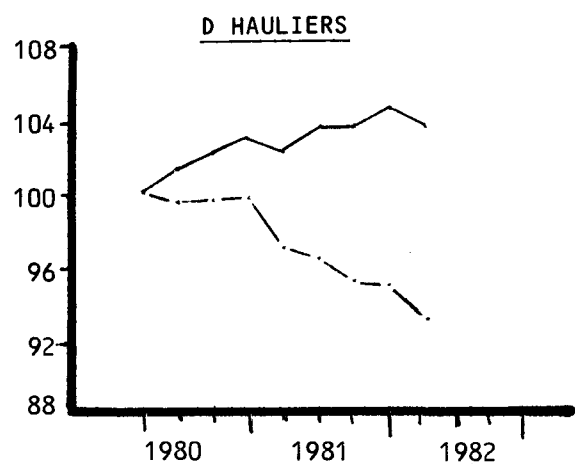
French hauliers

Average prices of French hauliers have risen very strongly, and more strongly than other hauliers on all relations (even when measured in EUA, in FF the rises are even more spectacular). The currency re-adjustment in the fourth quarter of 1981 did, however, restore French hauliers' competitiveness, especially in the case of the relation with Germany where the difference in relative prices (both taken relative to first quarter 1980 = 100) narrowed to under 3% as compared to nearly 8% in the previous quarter.

Belgian hauliers

Average prices of Belgian hauliers (which are shown on a half-yearly basis because of the fluctuations in the quarterly figures due to relatively small samples) have shown disappointing trends on all relations, the only improvement (in EUA) being a 3% rise in the relation with France. Expressed in FB, the results are slightly more satisfactory.

FIGURE 3.3: OVERALL RESULTS FOR D, F, NL, B AND I HAULIERS



— INDICES AT CURRENT PRICES
(IN NATIONAL CURRENCIES)
RELATIONS WITH D, F, NL, B
AND I.

- - - INDICES AT CONSTANT PRICES
(Q1 1980 = 100, EXCEPT B,
H 1/80 = 100 AND I Q3/81 =
100) USING RETAIL PRICE
INDEX AS DEFLATORS).

FIGURE 3.4: EFFECTS OF CHANGES IN EXCHANGE RATES

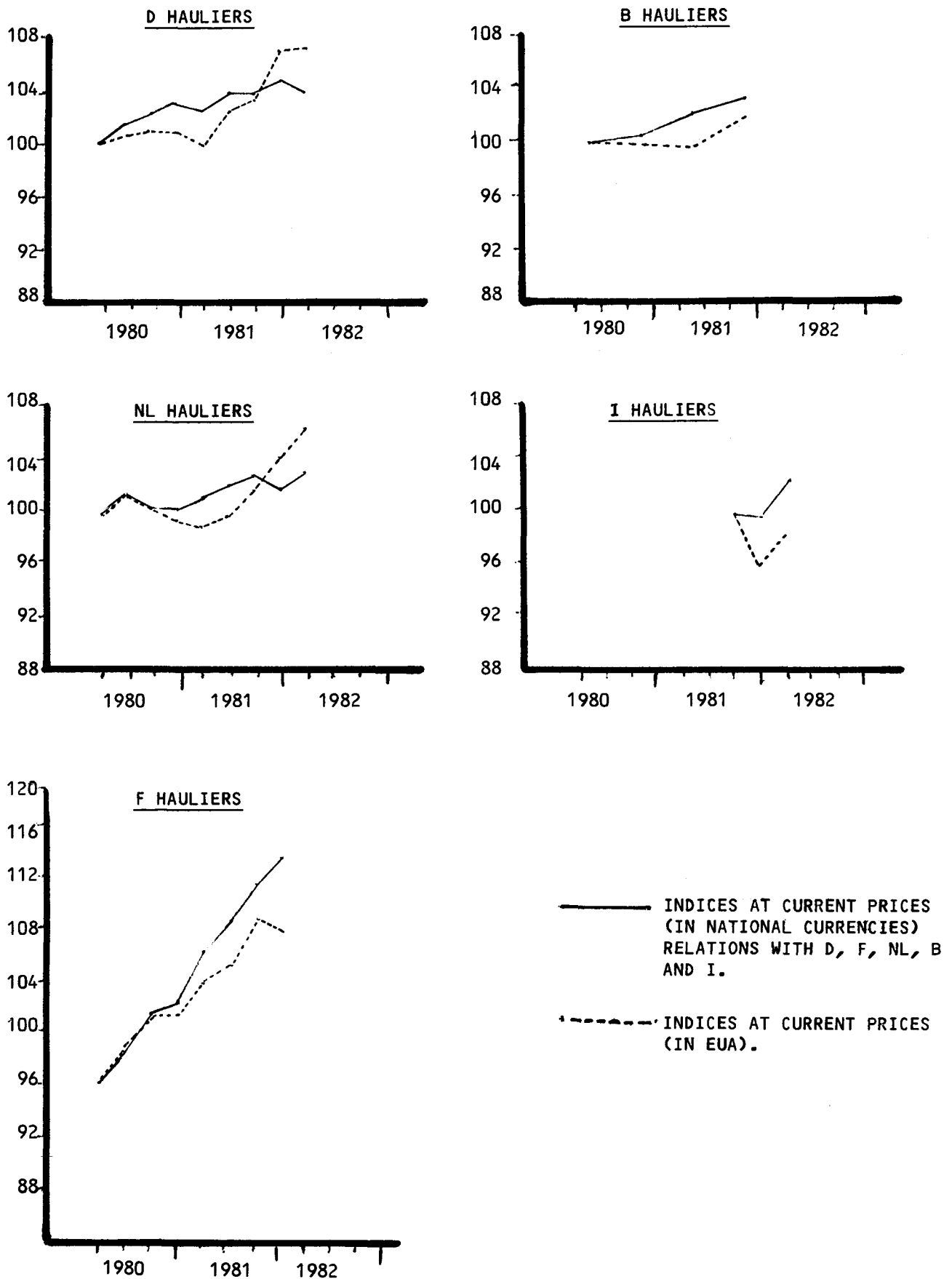


Figure 3.5. PRICE DEVELOPMENT IN RELATIONS BETWEEN D, F, NL AND B

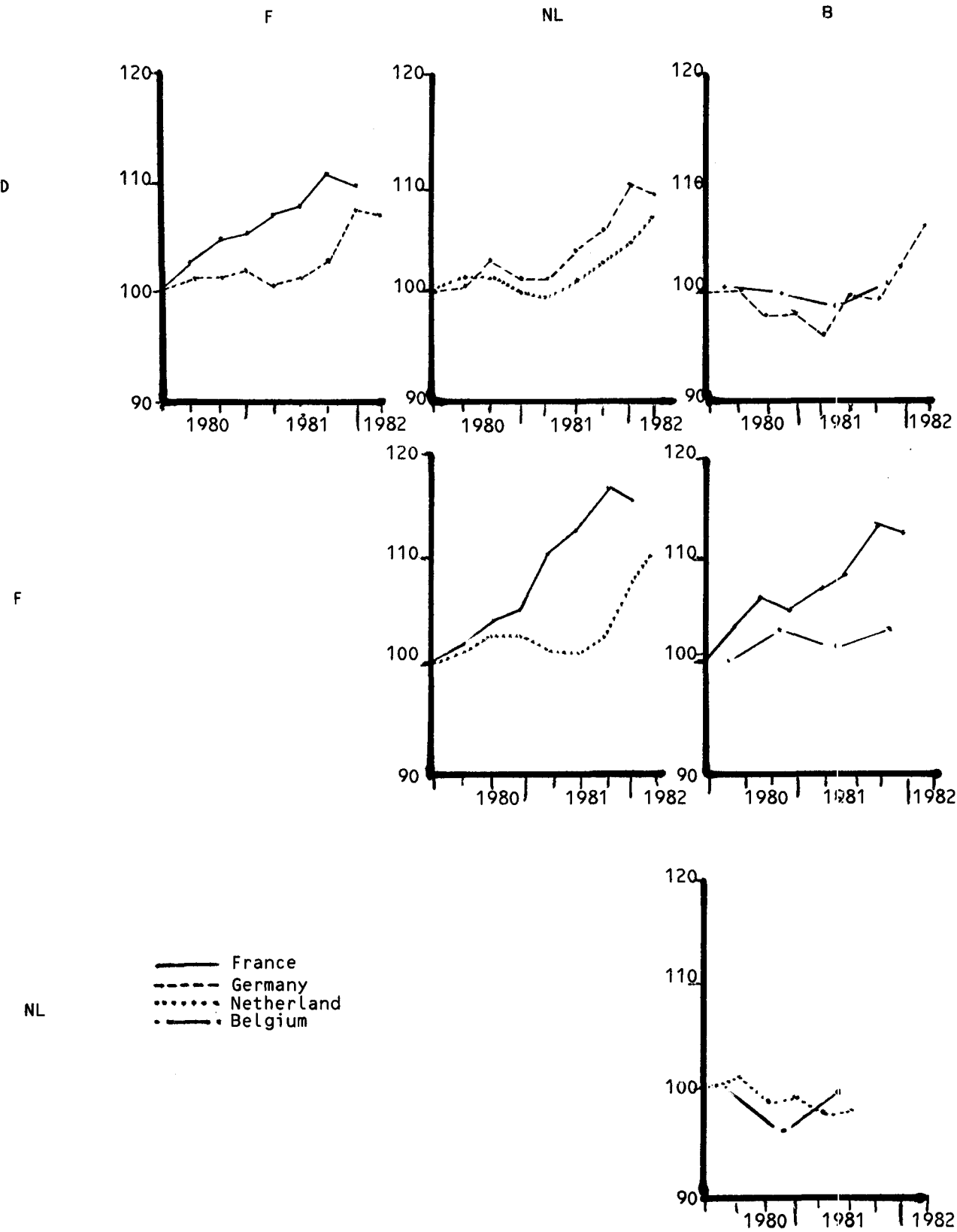
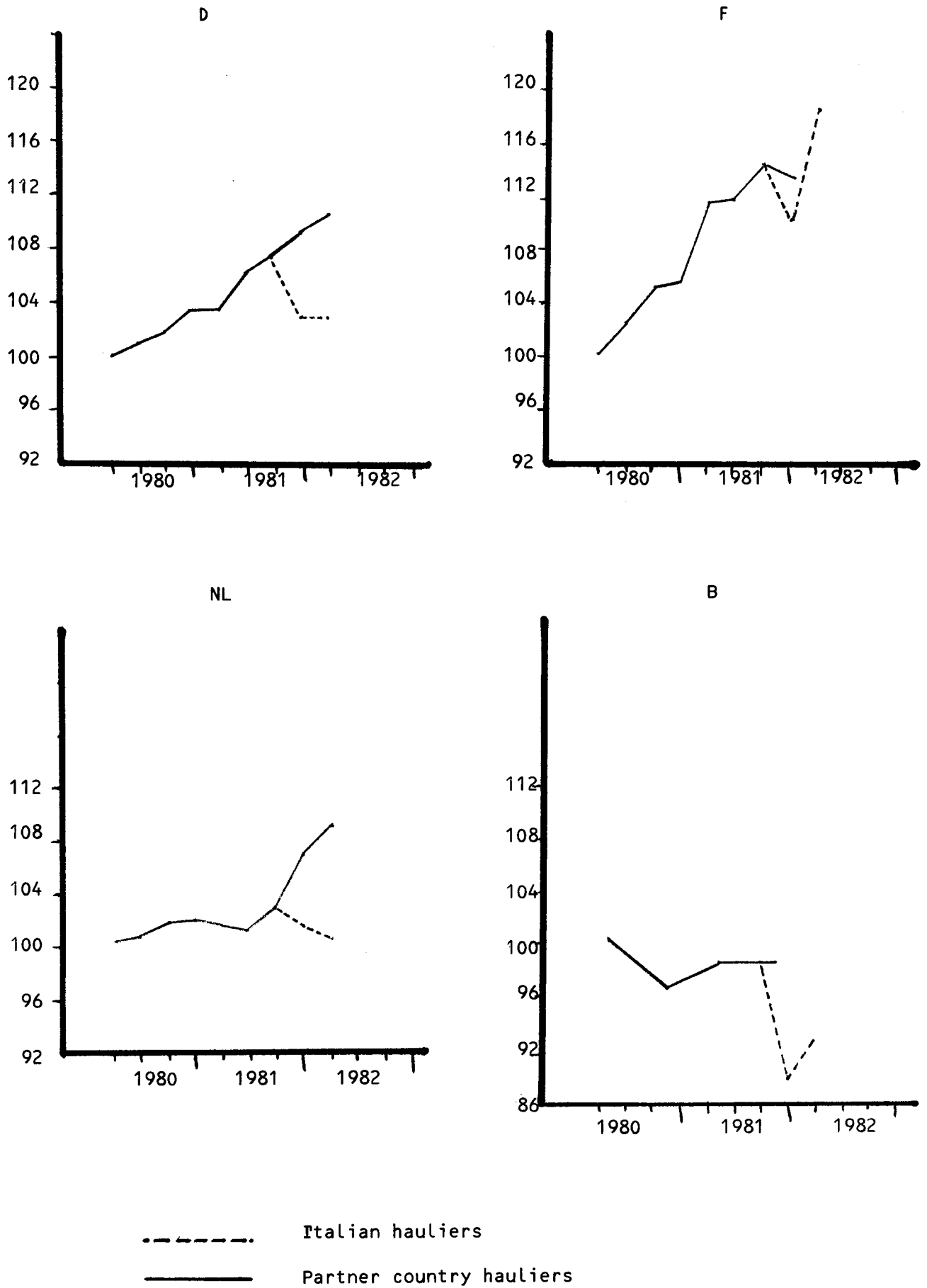


FIGURE 3.6. PRICE DEVELOPMENT IN RELATIONS WITH ITALY



SECTION 4: WATERWAY SURVEYS

4.1. Rhine traffic

The Opinion Surveys concerning Rhine traffic are carried out by the Central Rhine Commission in cooperation with the Rhine Shipping Consortium and the Commission of the European Communities among a sample of about 25 shipping companies (which account for approximately 50% of traditional Rhine traffic).

4.1.1. Activity

The results of the survey on the first quarter 1982 show that the activity level is, at best, not very good.

Looking at Figure 4.1, the moving average calculation emphasizes that there is a slight improvement in the activity in comparison with the previous quarter. The opinion of the operators interviewed, which is shown in Figure 4.4, indicates that the activity level during the first quarter 1982 has risen compared with that of the first quarter 1981. However, the activity level during the first quarter 1982 remains unsatisfactory.

4.1.2. Forecasts

The improvement in the activity level expected for the second quarter 1982 is not expected to continue during the third quarter (Figure 4.5) and the downwards trend resulting from the moving average calculation of the forecasts (Figure 4.1) does not give much hope of an upswing.

The forecasts show that after a recovery in total capacity utilization on the Rhine during the fourth quarter 1981, the trend was again downwards during the first quarter 1982 (Figure 4.1). In the opinion of the operators interviewed, this trend will continue during the third quarter, after a levelling out during the second quarter 1982. The forecast of total capacity utilization for the first quarter 1982 was down compared with the same quarter 1981 (Figure 4.5).

In spite of a slight recovery in coal traffic at the beginning of the first quarter 1982, the transport activity of solid mineral fuels has remained moderate. The operators interviewed expect a decrease in arrivals during the second and third quarters 1982 in comparison with the previous quarter. The transport forecasts for the Rhine for the first quarter were slightly lower compared to those for the first quarter 1981.(Figure 4.2).

The level of ore traffic continued to be worrying during the first quarter 1982. According to the specialized press, there is a considerable overcapacity on the Rhine. The operators interviewed who had foreseen a recovery in ore traffic during the first quarter 1982 were expecting a downward swing during the second quarter, and a slight improvement during the third quarter 1982.

The operators were of the opinion that construction material transports continued to be disappointing during the first quarter 1982. However, according to the specialized press, the number of ships running empty towards Rotterdam were less numerous. They were expecting an improvement during the second and third quarters 1982. In comparison with the first quarter 1981, the forecasts were much more pessimistic during the first quarter 1982 (Figure 4.2).

With regard to the transportation of petroleum products, the operators interviewed were expecting a gradual improvement during the second and third quarters 1982, compared with the previous quarter (Figure 4.2). During the first quarter 1982, the activity level was indifferent, as during the fourth quarter 1981. The specialized press indicated that this disappointing activity level was due to the early arrival of winter, the rather low number of arrivals of gasoil and petrol and the doubts which existed concerning the price developments of petroleum products on the free market.

4.1.3. Freight rates

In the opinion of the operators interviewed, the rise in freight rates which has been occurring since the second quarter 1981 did not continue during the first quarter 1982 (Figure 4.3). However, the freight rates during the first quarter 1982 were slightly higher than those of the first quarter 1981.

If the forecasts with regard to traffic indicate a marked rise during the second quarter 1982 and a more marked decrease during the third quarter 1982, they also indicate that for freight rates during the second quarter 1982 the continued decrease which began during a previous quarter and a stabilization during the third quarter (Figure 4.5).

4.2. North/South traffic

The Opinion Surveys for North/South traffic are carried out by the "Economisch Bureau voor het Weg- en Watervervoer" (EBW) and by the "Institut pour le Transport par Batellerie" (ITB), in cooperation with the Commission of the European Communities.

4.2.1. Activity

The Belgian operators estimate that as with the previous quarter their activity level was stable during the second quarter 1982. The traffic on the relation F → B is lower than during the first quarter 1982. However, a slight increase is shown in the activity of ships between 1.551 and 2.550 t.

The Dutch operators interviewed deem that the decrease in activity continued during the second quarter 1982. Nevertheless, activity on the B → NL relation (and vice versa) remains stable compared with the previous quarter.

The balance of opinion of both Belgian and Dutch shippers indicates that the offers have slightly improved compared with the first quarter 1982.

4.2.2. Waiting time

The average waiting time for Belgian shippers was 7,5 days during the second quarter 1982, against 6,5 days during the previous quarter. An increase has occurred in the ships of between 200 and 450 t and those between 751 and 1.551 t, where the average waiting time is 11 and 5,5 days respectively. On the other hand, according to Belgian shippers, the average waiting time has decreased for the tonnage classes of between 450 and 750 t and for those of more than 1.551 t. These waiting times are respectively 7, 5,5 days (1.551 to 2.550 t) and 4 days (more than 2.550 t).

The Dutch shippers interviewed estimate that the average waiting time was 6,2 days during the second quarter 1982 against 5,2 days during the previous quarter. These increases can be put down to ships in the categories 751 to 2.550 t. The waiting times are 5,1 days for ships of 751 to 1.150 t, 1,3 days for ships of 1.151 to 1.550 t and 2,5 days for ships of 1.551 to 2.550 t, in place of 3,6, 0,5 and 0,9 days respectively during the first quarter 1982. The waiting times for ships from 200 to 450 t and from 451 to 750 t have decreased in comparison with the previous quarter. They are now 10,4 and 6 days respectively, against 12,1 and 6,5 during the first quarter 1982.

The specialised press, following a short-lived improvement in April of waiting times in the relation NL → F, recorded a considerable increase climaxing during the month of May. Since then, these waiting times have strongly decreased through to the end of the second quarter 1982.

In the traffic relation NL → B, the increase in waiting times started at the beginning of the second quarter 1982 and gradually increased until June. After a slight downwards trend, the waiting times have again increased.

4.2.3. Border crossings

During the second quarter 1982, the number of border crossings made by Dutch shippers was on average 6,5 against 7,3 during the first quarter 1982. In comparison with the first quarter 1982 the number of border crossings has increased for ships in the tonnage range 751 to 2.550 t, but has decreased for ships in the range 200 to 750.

The average of 6,5 border crossings during the second quarter 1982 made by Dutch shippers is broken down into 4,6 crossings by laden ships and 1,9 crossings by unladen ships, against 6,3 and 1,0 respectively during the first quarter of this year.

In spite of the decrease in the average number of border crossings by Dutch operators, the number of crossings by unladen ships has practically doubled.

The Belgian shippers made an average six border crossings as against four during the first quarter 1982. In comparison with the first quarter 1982, the number of border crossings increased for ships in the tonnage range of 451 to 1.150 t, but decreased for ships in the range of 1.151 to 1.550 t.

The average of six border crossings during the second quarter 1982 made by Belgian shippers is broken down into 3,5 crossings by laden ships and 2,5 crossings by unladen ships, against 3 and 1 respectively during the first quarter of this year.

Although it is true that the average number of border crossings made by Belgian shippers has increased, 75% of this increase is made up of unladen ships. The considerable increase in the average number of border crossings by unladen ships is a significant indication of the negative development of the inland waterway sector and in particular of North/South traffic.

4.2.4. Forecasts

The Belgian and Dutch shippers interviewed expect a decrease in the number of trips on offer during the third quarter 1982. With regard to price levels for inland waterway transport on the North/South, both the Belgian and Dutch shippers believe that this level was lower during the second quarter than for the first quarter 1982. However, they expect an improvement during the third quarter 1982.

4.2.5. Investments

As in the previous quarter, the large majority of both Belgian and Dutch shippers continue to have no investment intentions.

FIGURE 4.1 RHINE : INDICATORS OF ACTIVITY (MOVING AVERAGES) AND FORECAST UTILIZATION OF CAPACITY

Aggregate balance of opinions (in percentage)

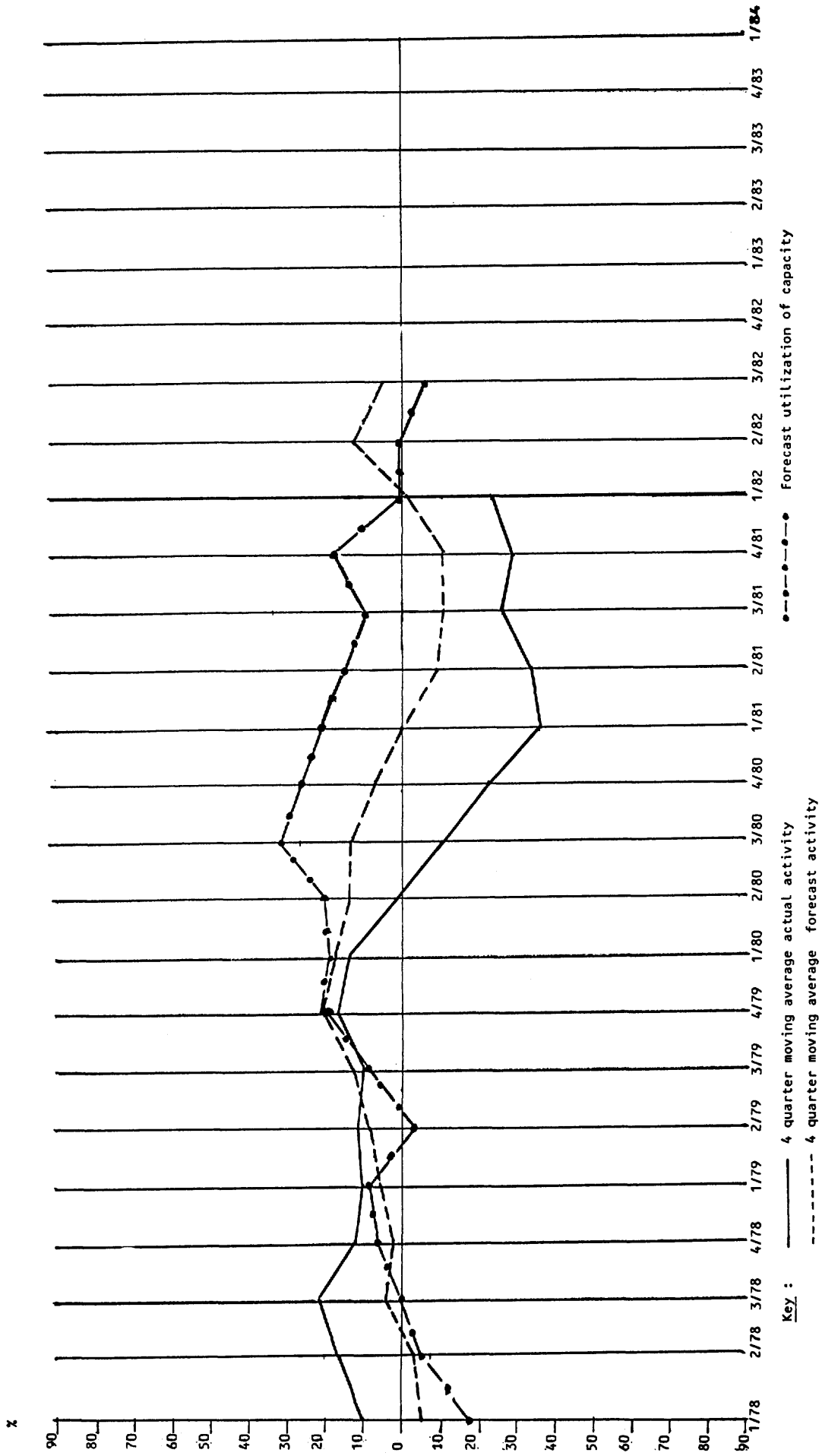


FIGURE 4.2 RHINE : INDICATORS OF FORECAST FOR 4 IMPORTANT NST-GROUPS (MOVING AVERAGES)

Aggregate balance of opinions (in percentage)

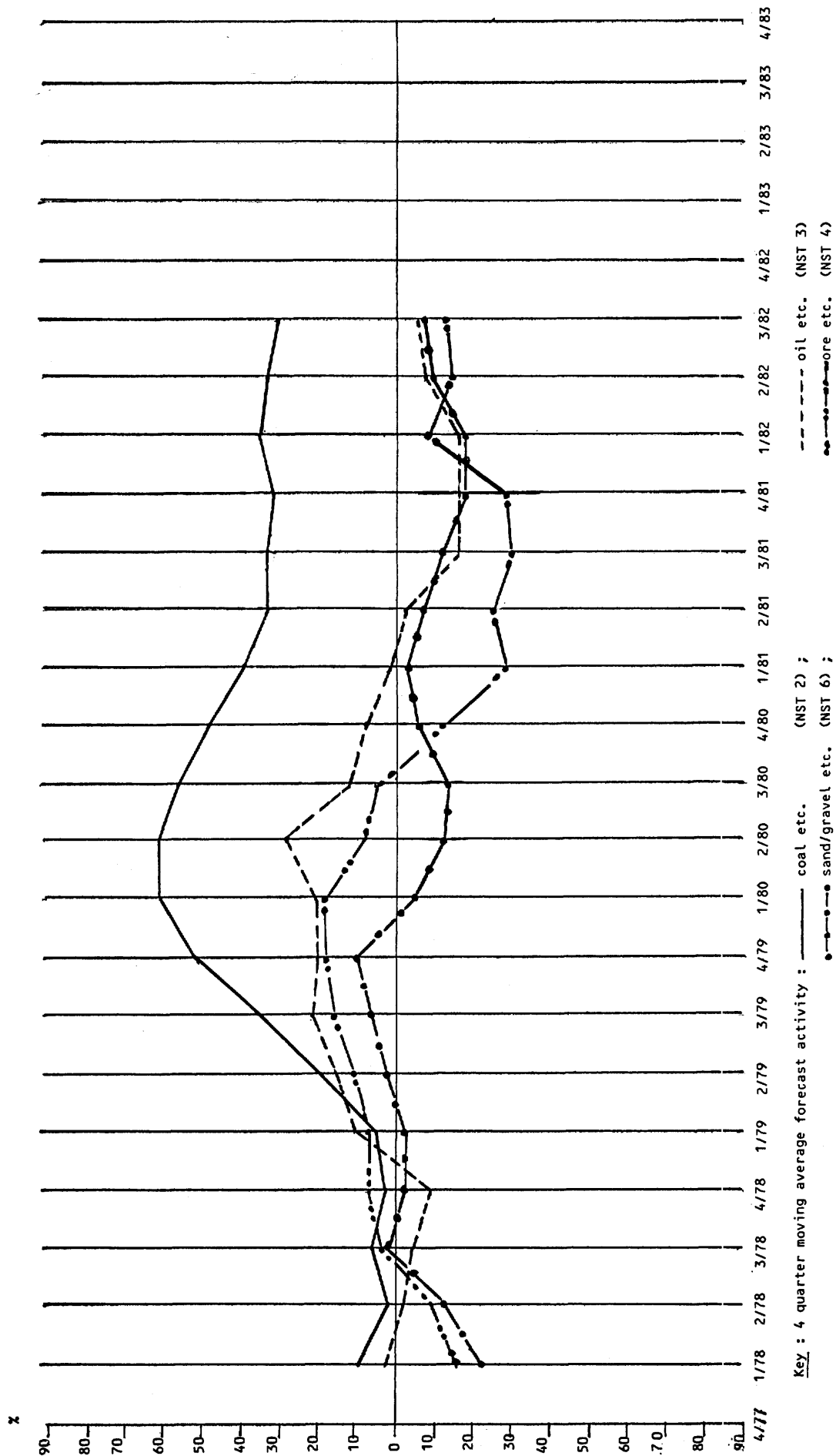


FIGURE 4.3 RHINE : DEVELOPMENTS IN FREIGHT RATES
Aggregate balance of opinions (in percentage)

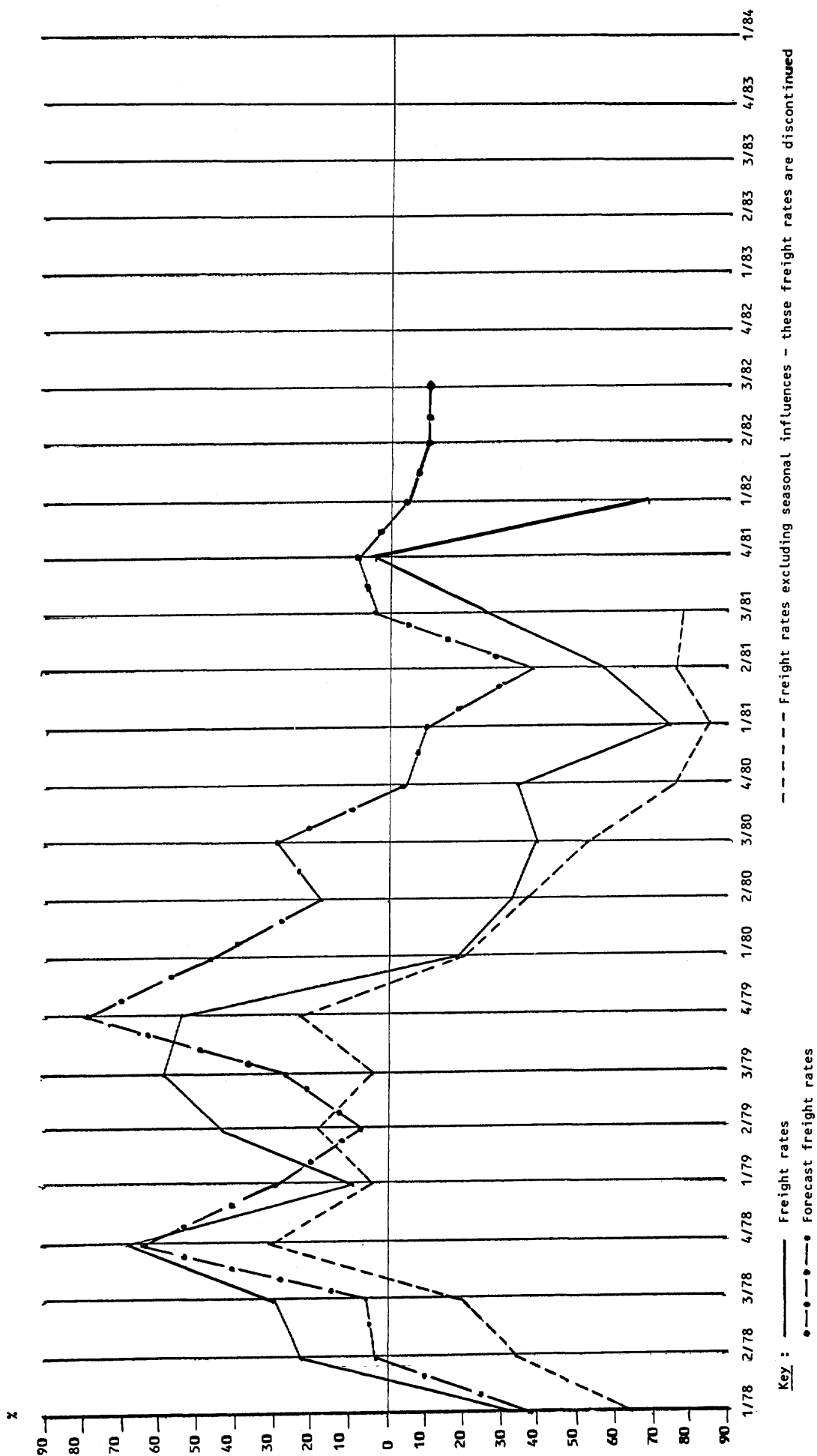


Figure 4.4 RHINE : INDICATORS OF ACTIVITY AND FREIGHT RATES

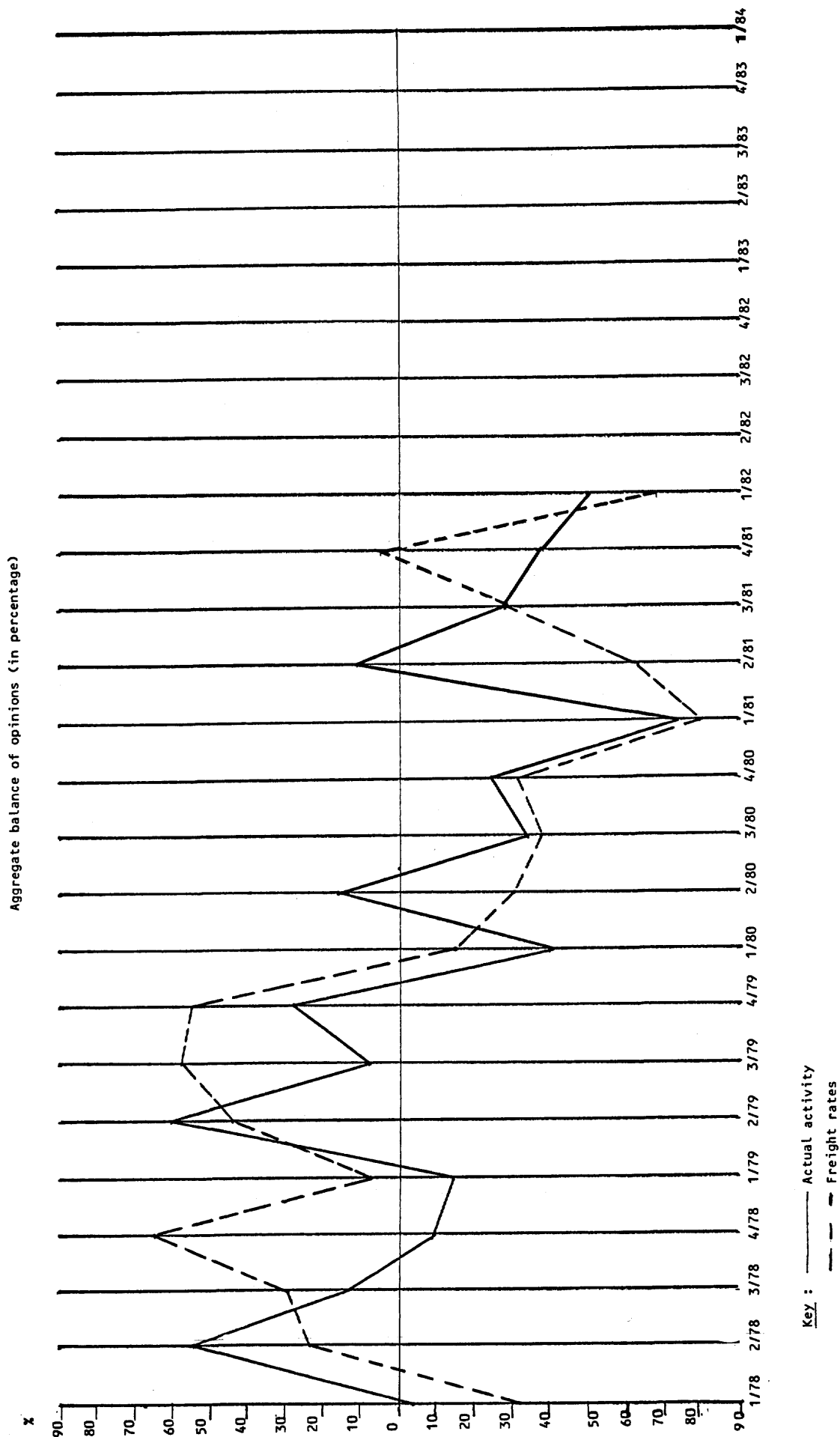
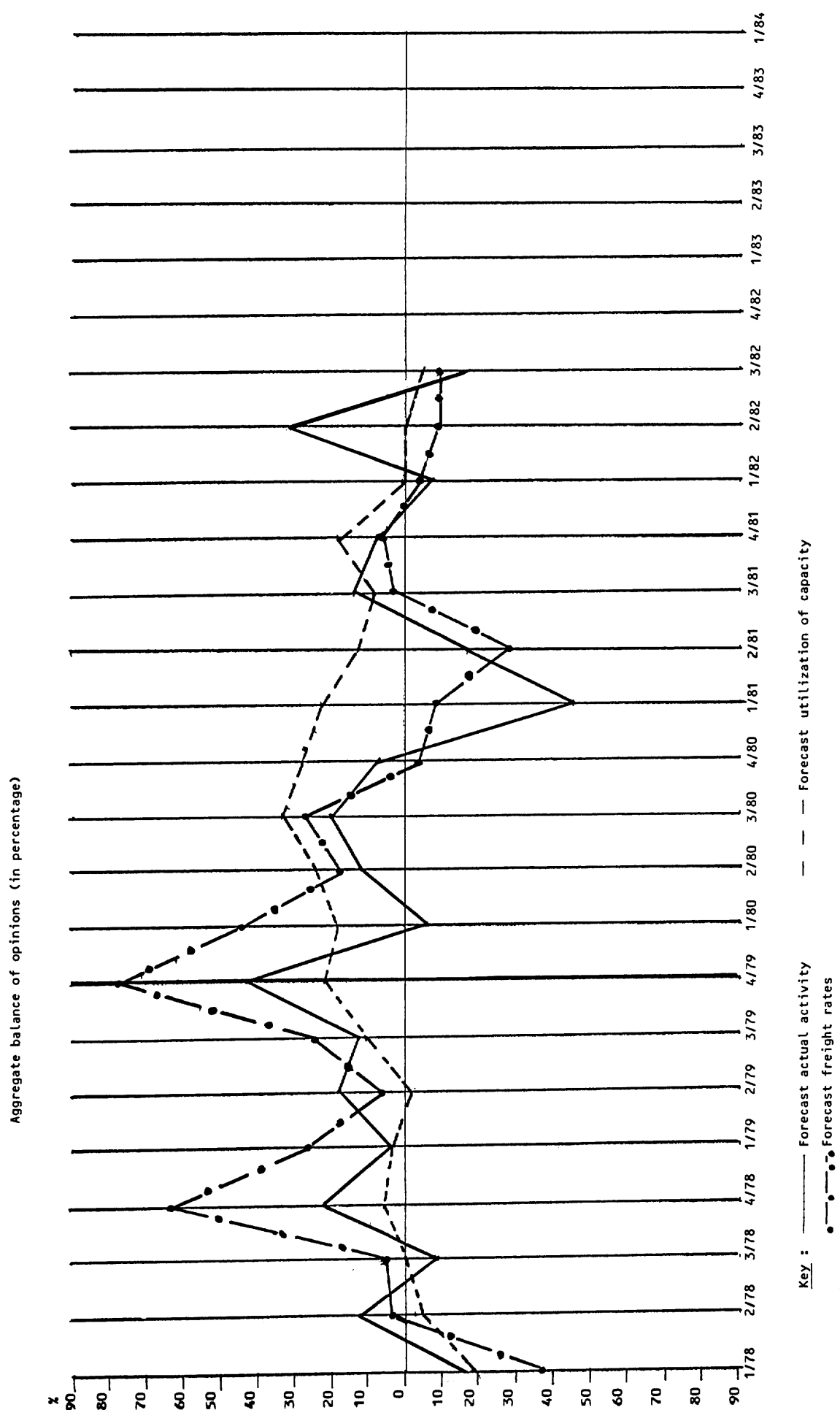


Figure 4.5 RHINE : FORECASTS : ACTUAL ACTIVITY, UTILIZATION OF CAPACITY AND FREIGHT RATES



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