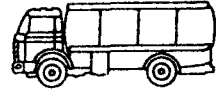


# EUROPA TRANSPORT



OBSERVATION OF THE TRANSPORT MARKETS

## MARKET DEVELOPMENTS



**6**

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# MARKET DEVELOPMENTS

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## PRESENTATION OF THE REPORT

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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

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- B Institut du Transport Routier
- DK Danmarks Statistik
- D IFD (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

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- B Institut du Transport Routier
- D BAG (Büdesanstalt 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

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- 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

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The steady improvement noted for all modes of inland transport during 1981 has not been sustained in the first half of 1982. Road transport has continued to grow at a moderate rate, but rail and waterway have shown a downturn in traffic in the second quarter 1982.

The essential factor underlying this decline in traffic is the continued recession in the coal and steel sector.

While there will be a seasonal upturn in traffic in the fourth quarter this is expected to be less buoyant than that for the same quarter of last year.

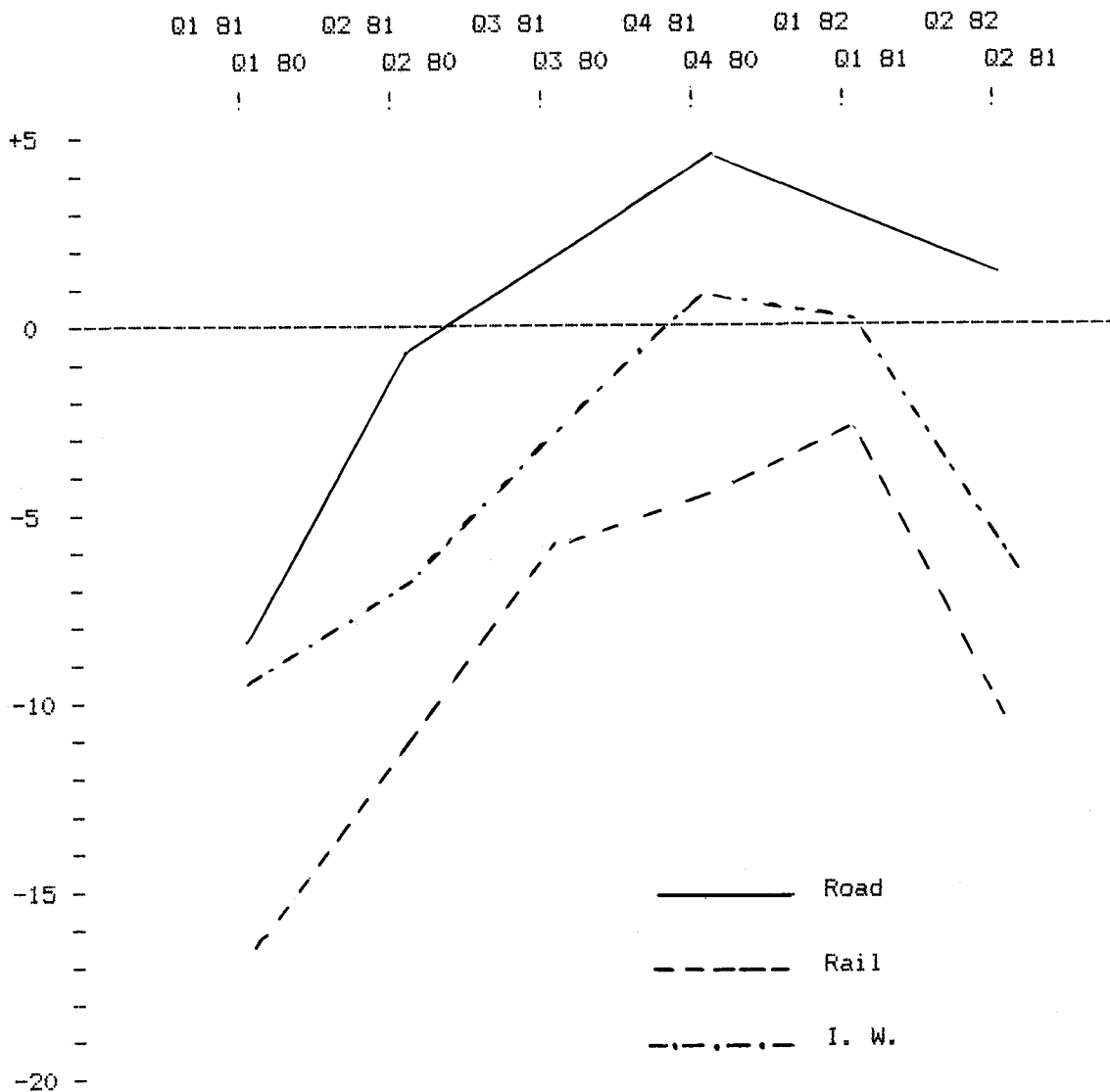
The low level of activity in the second quarter, and the indications that the third quarter has been particularly difficult, suggests that the out-turn for the year is likely to be a decline in total transport tonnage of 1.2%. The situation differs for each mode, with road expected to see a moderate growth of 2.7%, while rail and waterway will decline by 7.8% and 2.4% respectively in tonnage.

SECTION 2 : GENERAL MARKET ASSESSMENT

2.1. Recent Trends

The steady improvement noted for all modes throughout 1981 has not been sustained in the first half of 1982. (fig 2.1.)

Figure 2.1. Down turn in tonnage



2.1.1. The trends for individual modes are shown in table 2.1. The disappointing results for the second quarter of 1982, particularly inland waterways and railways, are due essentially to the reliance of these modes on the coal and steel sector. The road sector being less dependent on this bulk traffic, has continued growing, albeit at a modest rate (1.3% up on the second quarter of 1981).

Table 2.1. Growth rates by mode of transport (percentage change of a particular quarter on the corresponding quarter of the previous year)

MODE	YEAR	Q1 81	Q2 81	Q3 81	Q4 81	Q1 82	Q2 82
		Q1 80	Q2 80	Q3 80	Q4 80	Q1 81	Q2 81
Road		- 8.3	- 1.0	+ 2.0	+ 4.2	+ 2.9	+ 1.3
Rail		-16.3	-11.1	- 5.7	- 4.6	- 2.7	-10.2
I.W.		- 9.9	- 7.1	- 3.0	+ 0.8	+ 0.1	- 3.9
Total		-10.5	- 5.6	- 1.6	+ 1.2	+ 0.6	- 3.0

#### 2.1.2. Modal Split

In the second quarter of 1982, a traditionally strong quarter for this mode, road transport's share of the market in EUR-7 exceeded forty percent for the first time ever. The rail transport share was the lowest ever recorded while inland waterways remained stable.

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

Mode	Q2/82	Q2/81	% Change	Modal share
Road	41.3	40.8	+ 1.3	40.6
Rail	15.7	17.5	-10.2	15.5
I.W.	44.6	46.4	- 3.9	43.9
TOTAL	101.6	104.7	- 3.0	100.0

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

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

2.2. Modes

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2.2.1. The broad trends in bilateral relationships for Q2/82 are shown in table 2.3. for road, 2.4 for rail and 2.5 for inland waterways.

Table 2.3. Road

-----

	D	BL	NL	F	I	DK	UK	IRL	GR	OUT Total
D		++	-	++	++	+	++	++		+
BL	+		++	++	++	++	+	++		++
NL	+			+		-				
F	=	+	=		=	++	++	+		=
I	=	++		++		++				+
DK	--	++	++	++	++		++	--		-
UK	+	+		--	--		--			
IRL				++						
GR										
IN (Total)	=	--	=	++	+	+				

2.2.2. While in general table 2.3. indicates good growth on the majority of relations the average growth is lower because on the heavy density routes, Germany, Belgium and Netherlands, the growth rates were down, if not negative.

-----  
Legend for table 2.3.

Negative : over 7 percent      --  
              2 - 7 percent        -  
No change:                        =  
  
Positive : 2 - 7 percent        +  
              over 7 percent        ++



Table 2.4. Railways

	D	BL	NL	F	I	DK	OUT Total
D		--	++	--	--	++	--
BL	--		--	-	++	++	-
NL	--	++		++	--	=	=
F	--	--	--		--	++	--
I	--	--	--	=		--	--
DK	++	--		++	--		++
IN	--	-	--	+	--		
Total							

2.2.3. The decline in rail traffic was general on all high density routes.

Table 2.5. Inland Waterways

	D	BL	NL	F	OUT Total	
D		-	--	--	--	
BL	++		++	+	++	Legend for tables 2.4 and 2.5
NL	+	--		--	--	Negative:
F	--	--	--		--	Over 7% --
IN						2 - 7% -
TOTAL	+	--	-	--	--	No change: =
						Positive:
						2 - 7% +
						Over 7% ++

2.2.4. With the exception of Dutch traffic to Germany, Belgian traffic with Germany and to a lesser extent with France, all relations showed important declines.

### 2.3. Traffics (all modes)

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2.3.1. While it would be useful to analyse further the changes in bilateral traffics indicated in tables 2.3, 2.4 and 2.5, unfortunately data on goods categories are only fully available for France and, to some extent, Belgium. For the second quarter of 1982, table 2.6. shows some of the important changes in comparison with the second quarter of 1981.

Table 2.6.

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NST	F to B	F to D	B to F	B to D
Agricultural	- 7.7%	- 0.9%		
Coal + coke			-31.9%	-16.4%
Metal	-14.4%	-15.5%		
Sand + gravel	+ 9.5%	-26.3%	+ 9.5%	+ 7.7%

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### 2.4. Outlook for the second half of 1982

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2.4.1. The downturn in transport activity is due to

- lower general economic activity (Community GDP growth for 1982, originally put at 1.1%, is now expected to be only 0.3%);
- substantial drop in steel production (1982 expected to be 10% down on 1981) with consequent decline in ore and coke movements;
- drop in electricity demand and therefore reduced coal transportation.

This lower than expected level of economic activity implies a substantial downward revision of the original predictions of demand in the transport sector for 1982.

Table 2.7: Transport demand in 1982

	January forecast	Revised forecast
Road	+ 1.9%	+ 2.7%
Rail	- 1.0%	- 7.8%
I.W.	- 0.1%	- 2.4%
TOTAL	+ 0.5%	- 1.2%

## 2.5. United Kingdom, Ireland and Greece

### 2.5.1. United Kingdom

In comparison with the same quarter of 1981, the second quarter of 1982 showed an increase of 13% in powered vehicles from the United Kingdom to mainland Europe. UK registered vehicles accounted for 52% of the total of accompanied traffic for the second quarter, which was slightly down on the first quarter of 1982 and on the second quarter of 1981. 20% of foreign vehicles entering the UK were French, and the total of Community country vehicles was higher in the second quarter than ever before.

### 2.5.2. Ireland

The second quarter of 1982 showed a distinct growth over the first quarter, mainly due to a seasonal increase in meat and fish traffics. Meat traffic is declining as a percentage of total outwards traffic and in the second quarter of 1982 represented only about one third, but there appears to have been a significant rise in the market share of other food exports, mainly fish.

Short term developments are expected to include some continuing buoyancy in meat traffic, growth in some categories of dry goods, but a fall in imports of consumer goods early next year. There is currently some apprehension among hauliers about the impending effects of new VAT regulations.

### 2.5.3. Greece

Exports by road for quarter two 1982 were significantly down on the first quarter (-14%), most of this drop occurring in exports to Germany and, to a much lesser extent, the Netherlands. Second quarter figures were also down two percent on the same quarter of 1981.

Road import figures for the second quarter of 1982 were almost identical to the first quarter of 1982, but nearly 13% higher than the same quarter of 1981.

## SECTION 3 ROAD SURVEYS

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This section reports on two surveys;

- the road inquiry survey amongst hauliers noting their opinion on recent trends in international traffic and
- price indicators showing recent trends in rate movements.

### 3.1. Road Inquiry Survey

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#### 3.1.1. Summary of Activity Indicators (Figure 3.1. Tables 3.1. et 3.2.)

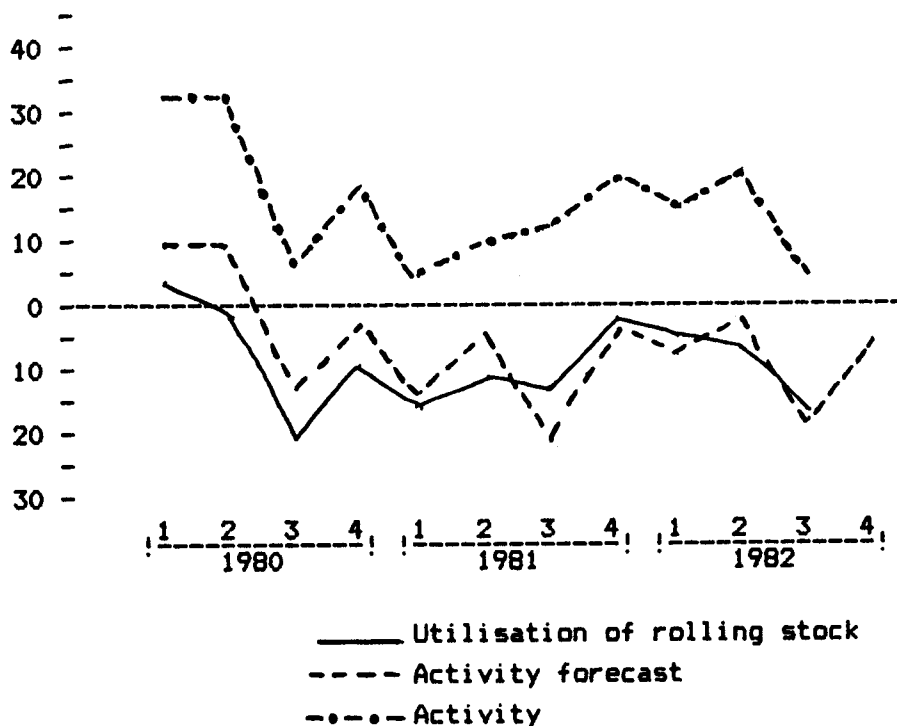
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Road transport continues in recession.

The inquiry for the third quarter indicates a net decline in the level of activity on the previous quarter and a small decline, with the exception of large firms, on the same quarter last year.

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

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#### 3.1.2. Activity : In decline

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While there were some exceptions in different Member States, In general all sizes of firms were equally affected by the drop in demand between the second and the third quarter.

3.1.3. Forecasts : Seasonal improvement

The improvement forecast for the fourth quarter is essentially seasonal. This improvement is weaker than that forecast for the same quarter last year.

However some transporters, particularly in Italy, expect a further decline.

3.1.4. Utilisation of fleet : Unsatisfactory

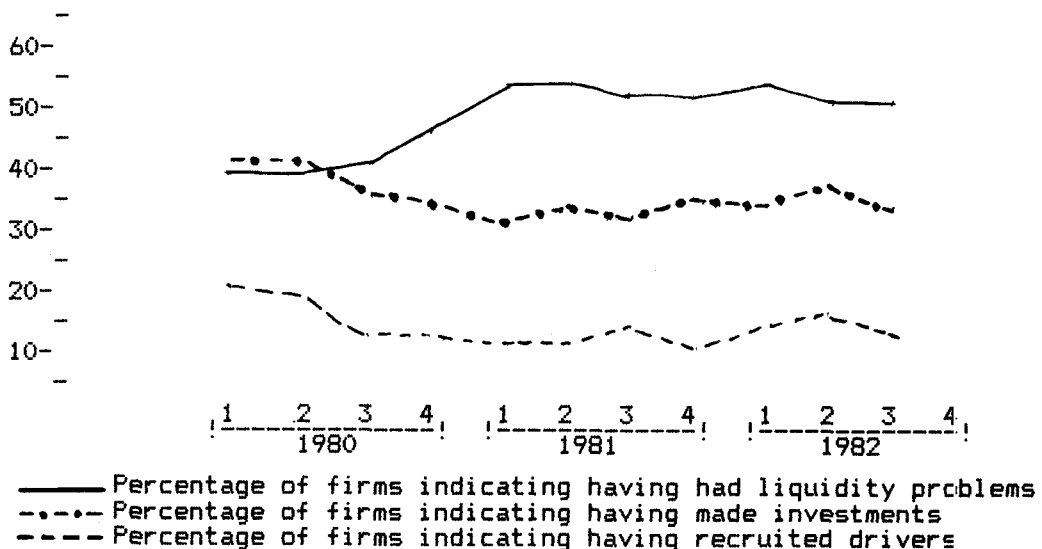
The overall opinion remains positive but there was a sharp drop of 15 points compared with the second quarter.

Large firms are less pessimistic than are either small or medium sized operators. Indeed small operators report the lowest level of satisfaction recorded to date.

3.1.5. Summary of Economic Indicators (Figure 3.2. Tables 3.3, 3.4 and 3.5)

Overall the results are weaker than those for the second quarter 1982. However, with the exception of recruitment, the position is somewhat better than at the same time last year.

Figure 3.2. Economic Indicators



Recruitment : In decline

There was a fall of 3 points on the preceding quarter in the number of firms having engaged drivers. This general decline was most noticeable for large operators (-7 points) than for both medium (-2 points) or small operators (-2). The percentage of firms having engaged drivers now stands at

Large	Medium	Small
19%	14%	7%

3.1.6. The overall percentage of firms who consider that in present employment conditions recruitment was easy or normal rose from 79% to 81%.

3.1.7. Cash Flow Problems : Unchanged  
-----

There was some improvement in Ireland and Italy. The situation in the United Kingdom, and particularly in Denmark, worsened. By size of firm 50% small and medium and 45% of large firms reported cash flow problems. The corresponding figures for the second quarter of this year were 50%, 51% and 44%.

3.1.8. Investment Undertaken : Falling  
-----

Compared with the preceding quarter the number of firms having invested fell by 3 points (22% as against 25%). By size of firm the situation reported is

Large	Medium	Small
down 6 points	down 3 points	down 3 points
to 52%	to 36%	to 22%

Investment in rolling stock increased its share of total investment from 82 to 86%. Of this 86% three quarters was for replacement and the remaining quarter for investment in additional capacity. Medium sized firms increased and smaller firms decreased their investment in new capacity.

3.1.9. Investment Intentions : Weakening  
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While larger operators report some slight increase small, and more particularly, medium size firms expect a decline in investment. Where investment is expected this will be for replacement of rolling stock rather than for new stock or for other activities.

3.2. Price Surveys  
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3.2.1. Coverage  
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Price surveys are now being carried out in Germany, France, Italy the Netherlands, Belgium and Luxembourg. The analysis relates to movements between these Member States up to the second quarter of 1982. Results for Belgium, prior to the fourth quarter of 1981, are from an investigation based on inspectors' records. Data for German hauliers is taken from BAG publications, as German data has not yet been fully integrated into the central analysis. Due to changes in survey methodology, it is not yet possible to incorporate the French results for the first and second quarter of 1982.

Figure 3.1

INDICATORS OF ACTIVITY  
Aggregate balance of opinions (inpercentage)

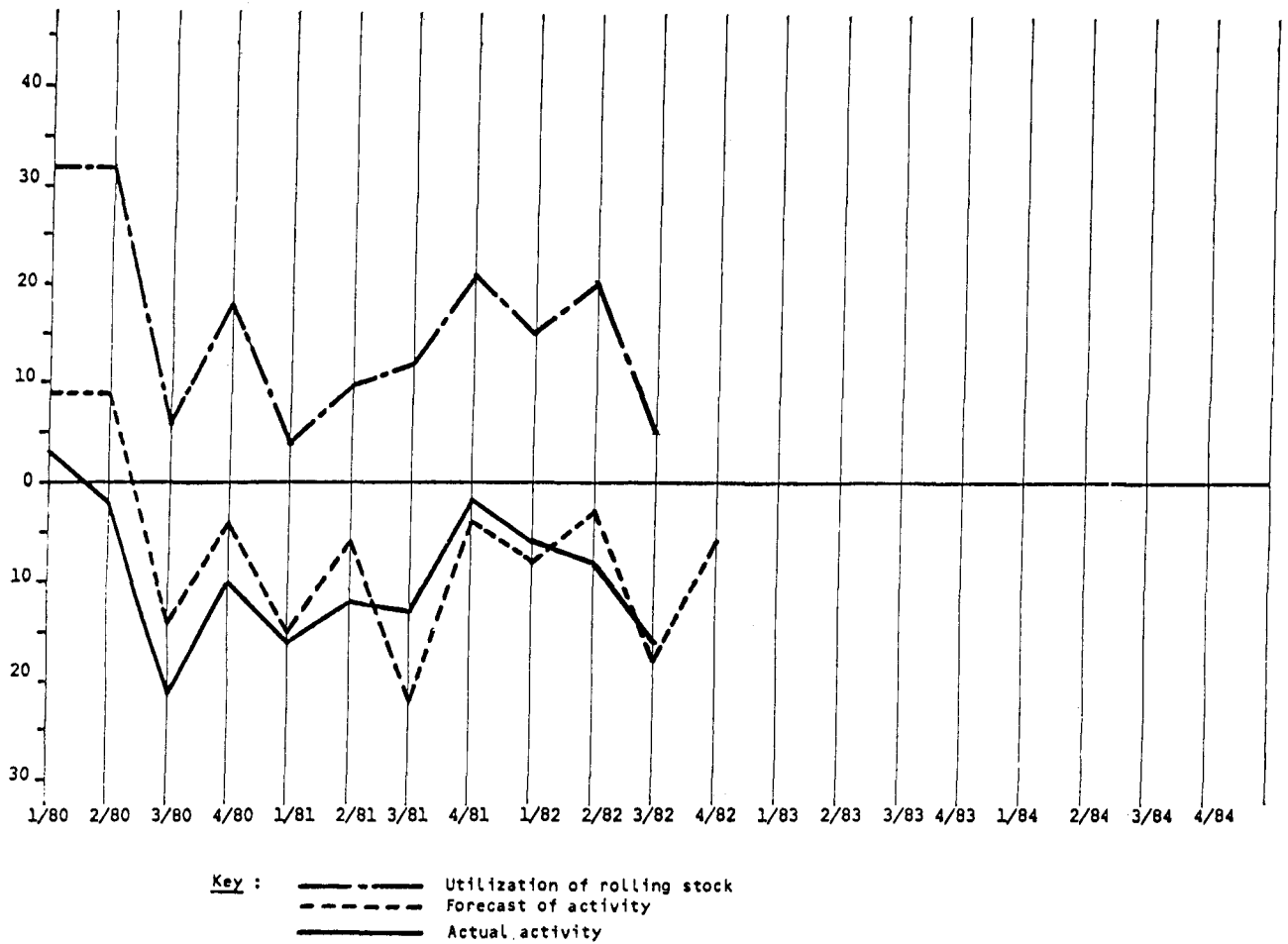


Figure 3.2

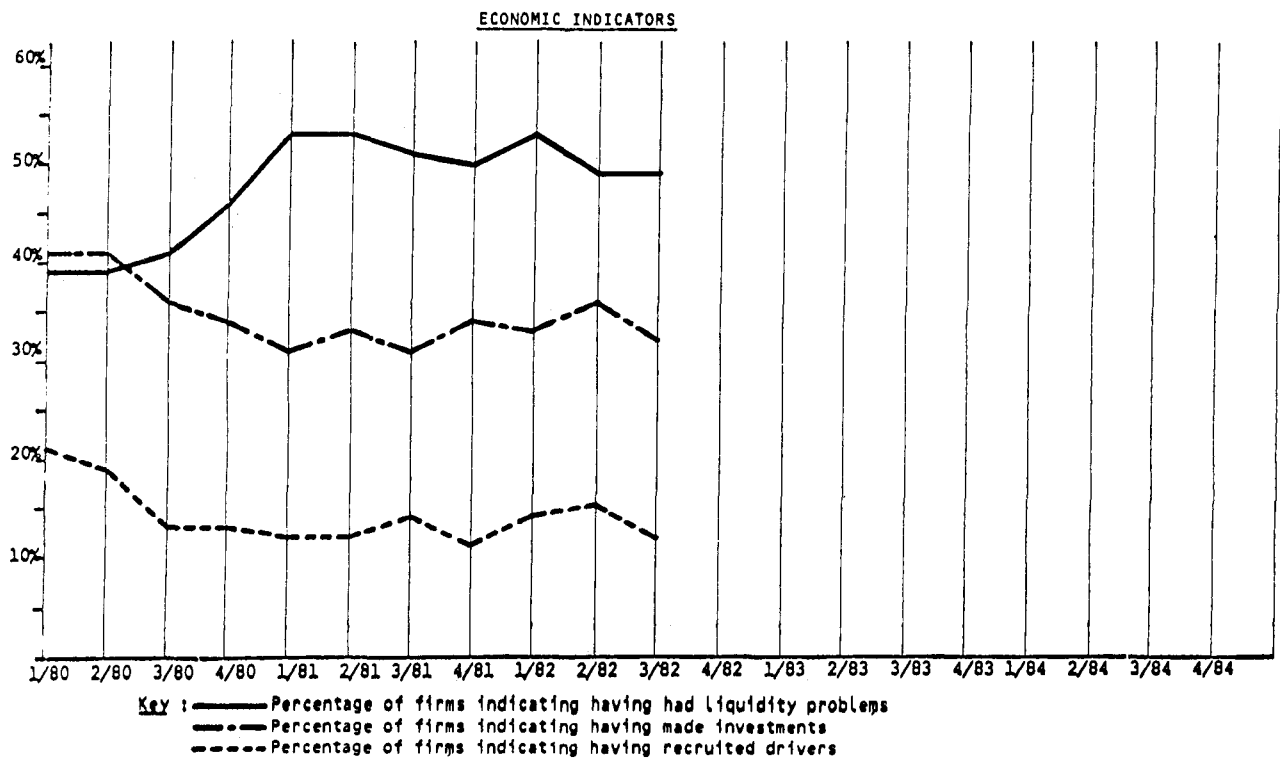


Table 3.1

## 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	23										
	=	48	50	39	47	46	41	43	44	48	51	43										
	-	23	23	42	28	29	31	35	25	24	18	34										
	S	+6	+4	-23	-3	-4	-3	-13	+6	+4	+13	-11										
DANMARK	+	34	27	19	26	24	20	21	24	26	26	17										
	=	58	57	53	57	57	65	61	60	64	64	61										
	-	8	16	28	17	19	15	18	16	10	10	22										
	S	+26	+11	-9	+9	+5	+5	+3	+8	+16	+16	-5										
DEUTSCHLAND	+	20	18	15	16	20	18	19	20	22	19	18										
	=	56	54	45	51	46	54	48	49	49	55	44										
	-	24	28	40	33	34	28	33	31	29	26	38										
	S	-4	-10	-25	-17	-14	-10	-14	-11	-7	-7	-20										
FRANCE	+	29	22	18	14	16	14	16	22	17	14	13										
	=	49	51	50	49	41	48	48	46	48	50	51										
	-	22	27	32	37	43	38	36	32	35	36	36										
	S	+7	-5	-14	-23	-27	-24	-20	-10	-18	-22	-23										
EMAAA	+								27	16	14	17										
	=								47	45	31	33										
	-								26	39	55	50										
	S								+1	-23	-41	-33										
IRELAND	+			42	25	18	24	21	25	21	27	21										
	=			34	47	29	47	40	40	48	39	37										
	-			24	28	53	29	39	35	31	34	42										
	S			+18	-3	-34	-5	-18	-10	-10	-7	-21										
ITALIA	+	20	25	16	14	15	15	17	18	15	16	14										
	=	53	45	44	41	41	44	43	53	49	47	41										
	-	27	30	40	45	44	41	40	29	36	37	45										
	S	-7	-5	-24	-31	-29	-26	-23	-11	-21	-21	-31										
LUXEMBOURG	+	23	21	13	26	25	26	12	25	28	26	21										
	=	61	66	44	44	46	51	51	62	48	50	50										
	-	16	13	43	30	29	23	37	13	24	24	28										
	S	+7	+8	-30	-4	-4	+3	-25	+12	+4	+2	-7										
NEDERLAND	+	31	23	13	34	30	20	25	26	34	32	26										
	=	39	55	44	45	41	65	49	52	43	45	41										
	-	30	22	43	21	29	15	26	22	23	23	33										
	S	+1	+1	-30	+13	+1	+5	-1	+4	+11	+9	-7										
UNITED KINGDOM	+				29	23	21	24	28	28	25	21										
	=				45	49	53	56	59	60	56	63										
	-				26	28	26	20	13	12	19	16										
	S				+3	-5	-5	+4	+15	+16	+6	+5										
EEC	+	26	23	17	21	20	19	20	24	22	21	19										
	=	51	52	45	48	44	50	47	50	50	50	46										
	-	23	25	38	31	36	31	33	26	28	29	35										
	S	+3	-2	-21	-10	-16	-12	-13	-2	-6	-8	-16										

↑ Forecast

## Key :

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



Table 3.2

## 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	39										
	=	36	37	41	47	48	46	51	46	43	35	43										
	-	13	11	28	21	24	21	18	14	16	10	18										
DANMARK	+	64	55	33	49	42	40	41	46	49	48	43										
	=	33	39	50	43	45	49	47	41	43	46	45										
	-	3	6	17	8	13	11	12	13	8	6	12										
DEUTSCHLAND	+	39	33	27	30	25	28	21	30	33	28	20										
	=	45	53	47	52	51	53	53	46	49	51	51										
	-	16	14	26	18	24	19	26	24	18	21	29										
FRANCE	+	28	49	35	43	36	37	44	46	29	43	27										
	=	54	29	34	23	20	26	25	25	34	23	40										
	-	18	22	31	34	44	37	31	29	37	34	33										
ΕΥΡΩΠΑ	+								23	18	15	8										
	=								56	53	28	31										
	-								21	29	57	61										
IRELAND	+			57	63	28	30	31	36	34	30	30										
	=			33	22	40	40	38	35	37	40	47										
	-			10	15	32	30	31	29	29	30	23										
ITALIA	+	27	27	22	20	14	14	18	17	15	14	17										
	=	55	52	56	47	48	55	59	62	64	63	51										
	-	18	21	22	33	38	31	23	21	21	23	32										
LUXEMBOURG	+	59	58	45	40	28	37	28	28	18	22	14										
	=	39	36	45	58	58	56	58	65	75	67	72										
	-	2	6	10	2	14	7	14	7	7	11	14										
NEDERLAND	+	59	57	30	44	49	46	47	52	51	60	38										
	=	34	38	39	37	32	42	36	38	37	35	40										
	-	7	5	31	19	19	12	17	10	12	5	22										
UNITED KINGDOM	+				49	43	44	48	68	65	62	58										
	=				28	32	35	37	25	26	22	23										
	-				23	25	21	15	7	9	16	19										
EEC	+	44	45	31	39	32	33	34	39	36	40	31										
	=	44	42	44	40	40	44	44	41	43	40	43										
	-	12	13	25	21	28	23	22	20	21	20	26										

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

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	26									
DANMARK	14	14	24	19	26	23	31	29	32	23	32									
DEUTSCHLAND	29	29	32	34	43	44	39	42	40	39	40									
FRANCE	52	54	53	61	67	66	64	61	64	60	60									
ΕΛΛΑΔΑ								63	54	76	79									
IRELAND			57	62	79	59	53	51	58	58	50									
ITALIA	49	57	53	64	65	72	70	70	72	76	69									
LUXEMBOURG	26	20	34	21	63	15	43	27	57	38	40									
NEDERLAND	20	16	23	17	19	16	18	15	18	12	11									
UNITED KINGDOM				58	64	57	57	51	56	49	53									
EEC	39	39	41	46	53	53	51	50	53	49	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	32									
DANMARK	57	49	43	32	35	39	44	40	43	45	35									
DEUTSCHLAND	42	45	35	34	32	28	32	30	27	35	30									
FRANCE	39	39	35	30	31	30	27	34	34	35	31									
ΕΛΛΑΔΑ								46	33	42	24									
IRELAND			38	46	28	27	30	29	25	22	27									
ITALIA	33	39	35	34	26	29	26	27	26	25	21									
LUXEMBOURG	50	42	32	26	17	22	21	33	26	29	28									
NEDERLAND	52	41	41	40	38	44	36	47	46	42	43									
UNITED KINGDOM				57	30	52	50	49	53	63	61									
EEC	41	41	36	34	31	33	31	34	33	36	32									

### 3.2.2. Overall results by nationality of haulier

Average prices (measured in national currency) improved in the second quarter of 1982, after a weak performance in the first quarter. Average prices received by Italian hauliers rose sharply in the second quarter (over 9 per cent) and those of Dutch and German hauliers by 1 per cent. Average prices received by Belgian hauliers rose by 8 per cent compared with the last quarter of 1981 (the first quarter figures are being revised).

The deflated prices (average prices adjusted for changes in retail price index of the Member State concerned) were better in the second quarter of 1982. The deflated Italian prices were restored to their third quarter 1981 level, the deflated Belgian prices were up over 2 per cent (on fourth quarter 1981) and the deflated Dutch and German prices showed falls of less than 1 per cent in the second quarter of 1982.

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

### 3.2.3. Effect of changes in exchange rates

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 ECU.

Table 3.6. Changes in Average Prices

Period	01/80-04/81		04/81-02/82	
Country of haulier	in national currency	in ECU	in national currency	in ECU
Germany	+ 4.8	+ 7.2	- 0.1	+ 2.4
France	+17.7	+11.9		
Netherlands	+ 1.8	+ 4.3	+ 1.7	+ 3.5
Belgium	+ 3.1	+ 1.5	+ 8.2	- 1.6
Italy			+12.4	+10.7
Range	15.9	10.4	12.5	12.3

The results shown above in Table 3.6 indicate developments before and after the fourth quarter of 1981 separately. Average prices up to the fourth quarter of 1981 when expressed in ECU moved more similarly (range 10.4) than when expressed in national currency (range 15.9). However, since the fourth quarter of 1981, average prices have varied similarly when expressed in ECU (range 12.3) and in national currency (range 10.7).

#### 3.2.4. Price developments by relation

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Figure 3.5 shows the development of the average prices (in ECU) 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.

Member States with results for the most recent quarter will be discussed first.

##### Dutch hauliers

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Average prices on all relations show similar trends with only marginal changes (in ECU) until the third quarter of 1981. More recently average prices have shown different trends; the sharp increases on the relations with France and Italy between the third and fourth quarter of 1981 have petered out while on the relations with Germany the increase has been more steady at about 2% per quarter. (Note that Dutch hauliers' data since the third quarter of 1981 on the relation with Belgium has not been analysed due to difficulties with the data; it will be incorporated later.)

##### Italian hauliers

---

Average prices (in ECU) on relations with Germany and the Netherlands (strong currency countries) have similar patterns, a fall in the fourth quarter of 1981, followed by stability in the first quarter of 1982 and a very strong upsurge in the second quarter (over 15 per cent with the Netherlands and almost 10 per cent with Germany). Average prices on relations with France and Belgium (weak currency countries) have some similarities, a fall in the fourth quarter (at least in ECU), followed by a sharp recovery in the first two quarters of 1982. It may be seen that whereas Italian haulier prices fell relative to their competitors from the third quarter of 1981 onwards, this situation was reversed by the second quarter of 1982 for the relations where data for the competitors is available.

#### Belgian hauliers

---

Average prices of Belgian hauliers are shown on a half-yearly basis because of the fluctuations in the quarterly figures based on inspectors' records due to relatively small samples) and the temporary absence of first quarter 1982 figures which are being revised. They have shown disappointing trends (when expressed in ECU) on all relations, the weighted average after rising 1.5 per cent during 1980 and 1981 fell 1.5 per cent in the first half of 1982. Expressed in FB, however, the results are more satisfactory, particularly in the first half of 1982, where the depreciation of the FB (about 10 per cent) was almost offset by a rise of over 8 per cent in prices expressed in Belgian francs.

#### German hauliers

---

Average prices on the relation with Italy have advanced steadily since the beginning of 1980, up 9 per cent (in ECU) by the fourth quarter of 1981 and a further 4 per cent in the first two quarters of 1982. Average prices on relations with France and the Netherlands show similar patterns, with negligible changes in 1980, a steady rise in 1981, falls of about 2 per cent in the first quarter of 1982 and a sharp recovery in the second quarter. Average prices on the relation with Belgium were unchanged in 1980 and 1981 (prices of Belgian hauliers were weak too), but advanced by over 4 per cent in the first two quarters of 1982.

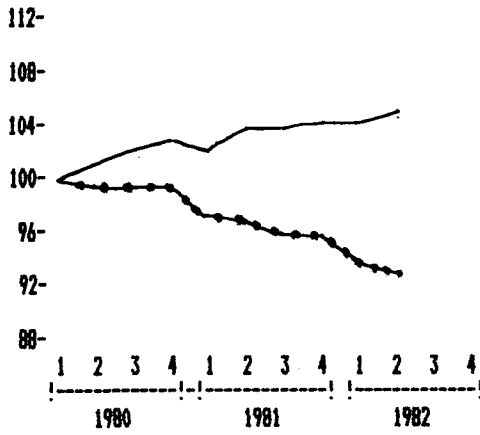
#### French hauliers

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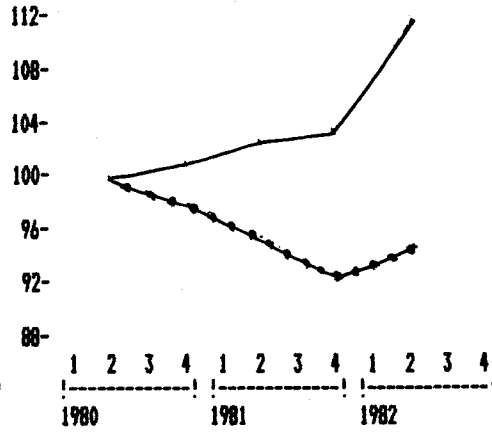
Average prices of French hauliers (in ECU) have risen very strongly, and more strongly than other hauliers on all relations; in french francs the rises are even more spectacular. The currency adjustment in the fourth quarter of 1981 did, however, restore French hauliers' competitiveness, especially in 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 per cent as compared to nearly 8 per cent in the previous quarter.

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

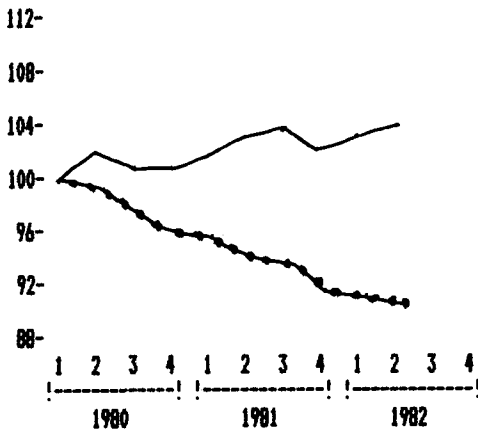
**D HAULIERS**



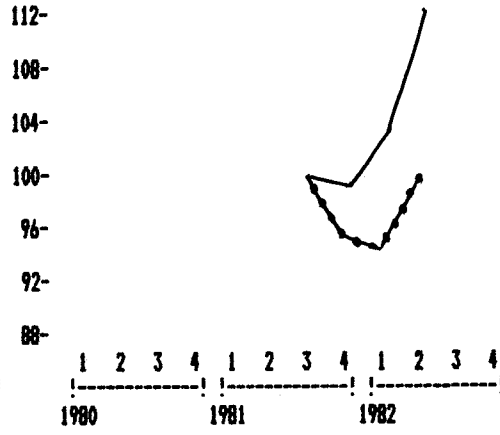
**B HAULIERS**



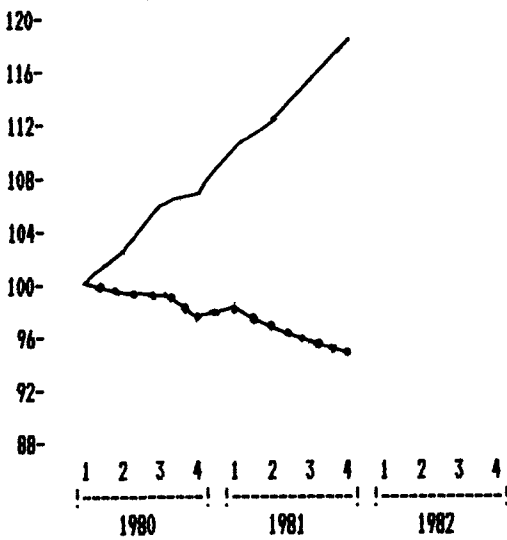
**NL HAULIERS**



**I HAULIERS**



**F 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

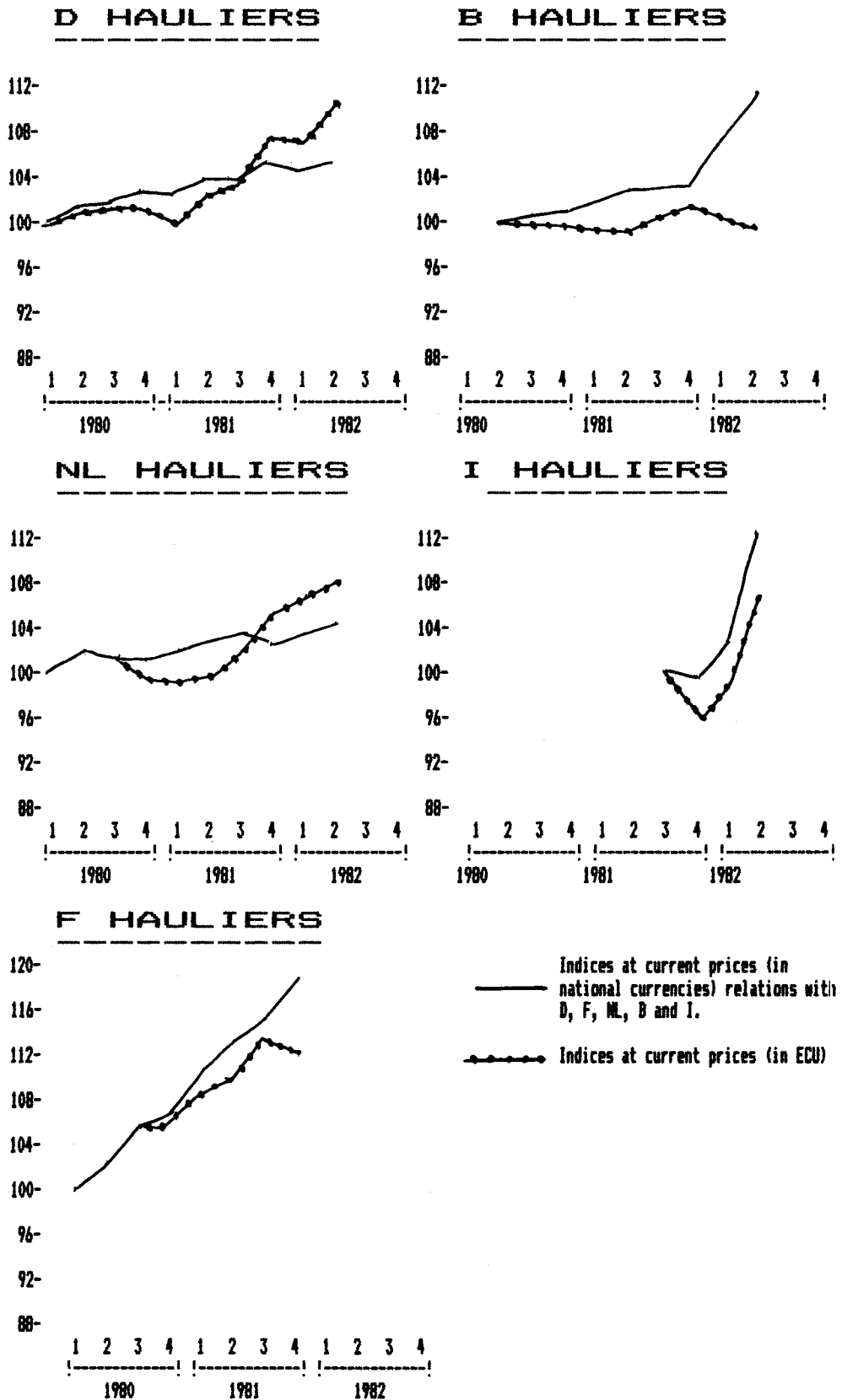


Figure 3.5: PRICE DEVELOPMENT IN RELATIONS BETWEEN D, F, NL AND B

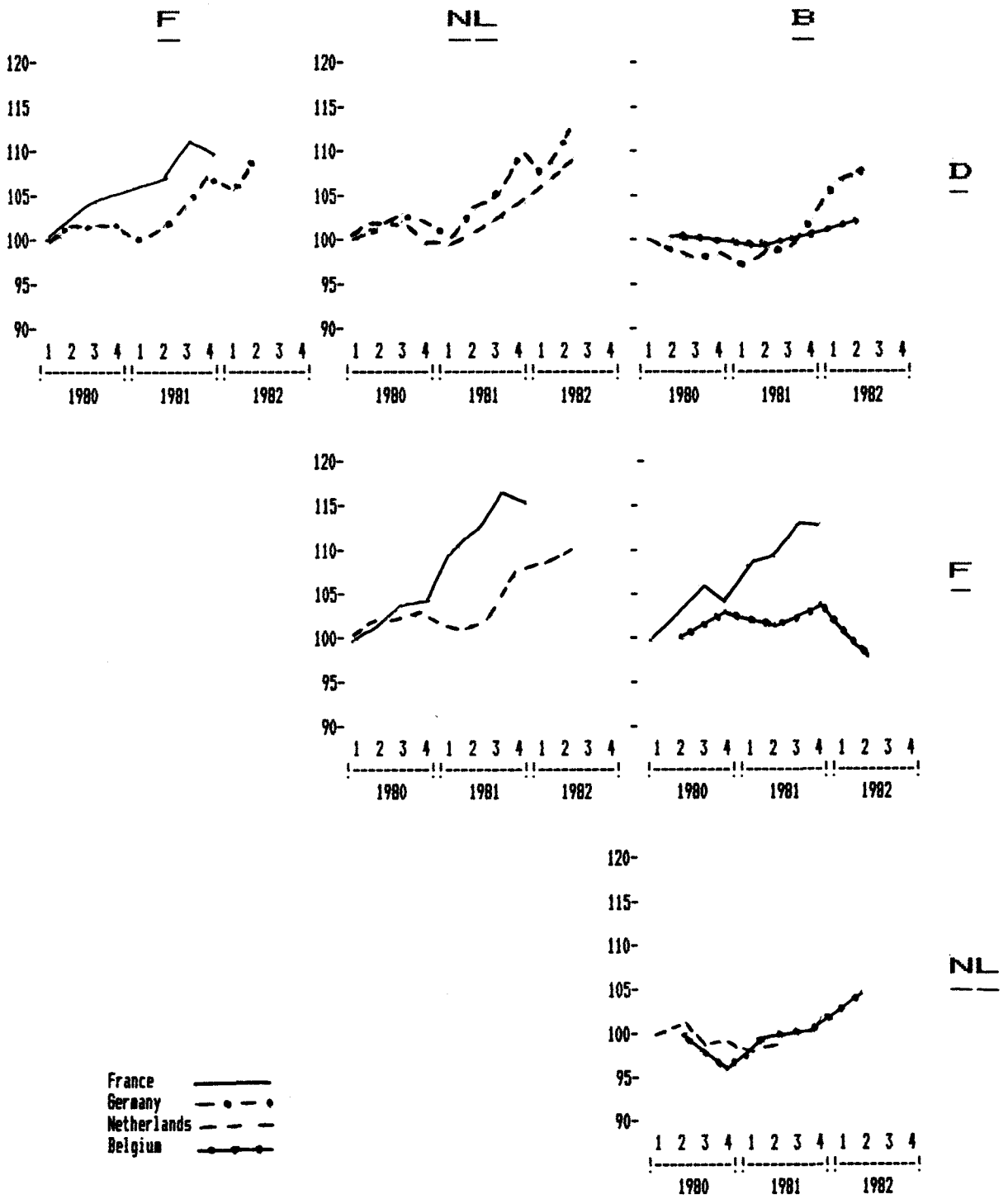
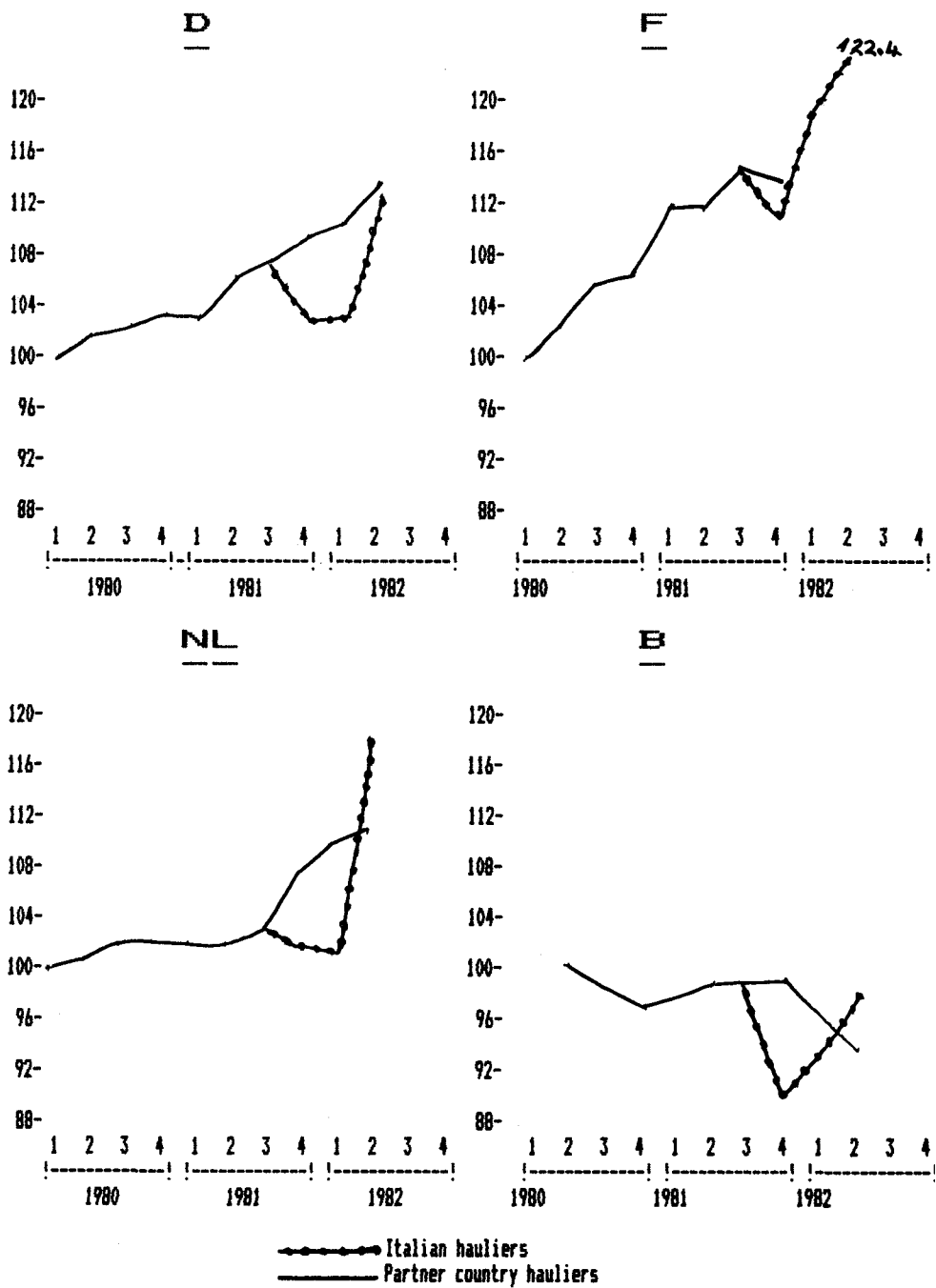




Figure 3.6: PRICE DEVELOPMENTS IN RELATIONS WITH ITALY



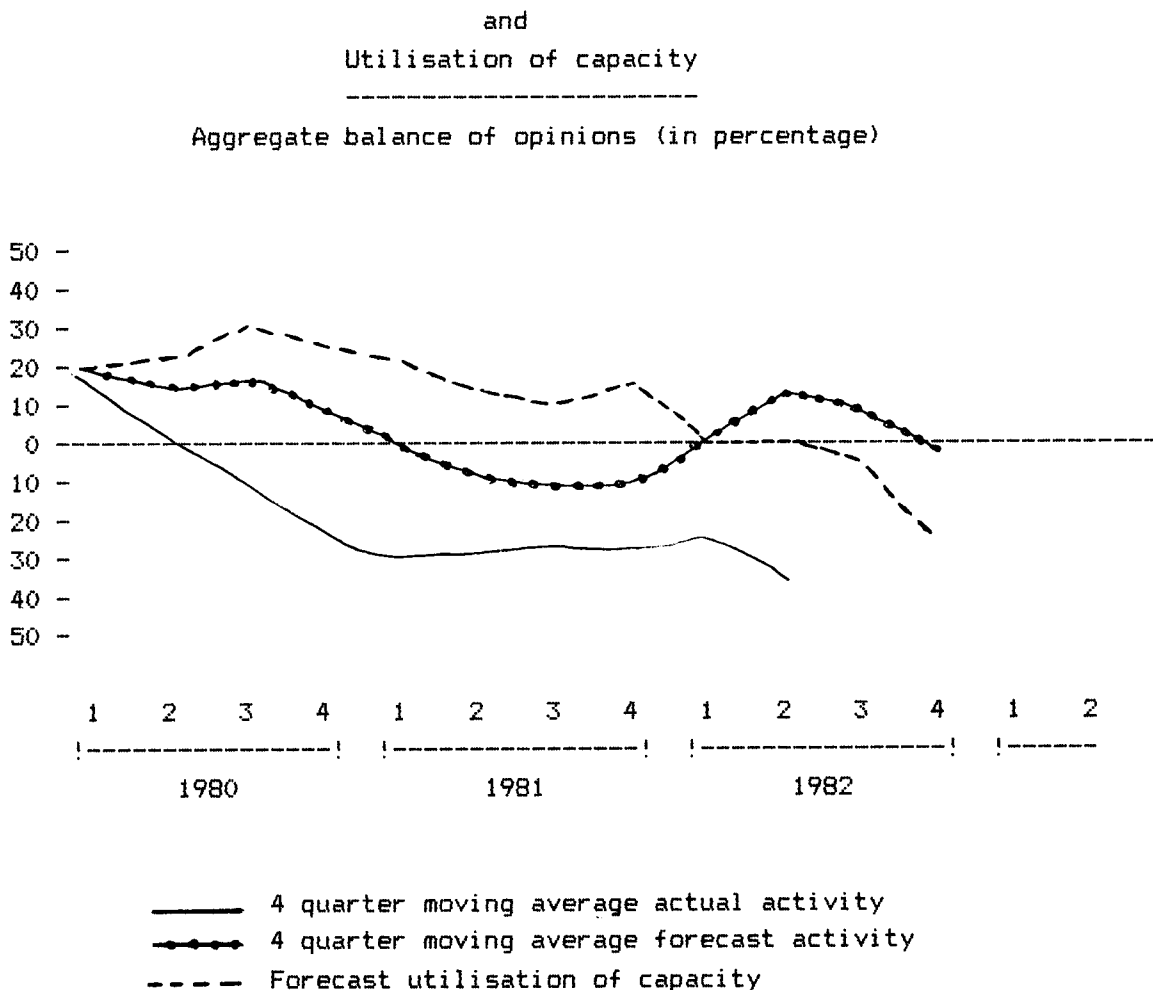
SECTION 4 : WATERWAY SURVEYS

4.1. Rhine traffic

4.1.1. Activity

In the opinion of shippers surveyed the level of activity for the second quarter 1982 is considerably worse than that of the second quarter 1981. Consequently, the moving average (calculated on the balance of opinion for the last four quarters, shows a regression in activity in comparison with the previous quarter. (fig 4.1.)

Figure 4.1. Rhine: Indicators of activity (moving averages)



Activity was seriously disrupted by the strike in the port of Rotterdam during May 1982, but recovered in June. The second quarter of 1982 showed the normal seasonal improvement over the first quarter. However, as indicated above, the tendency is downwards.

4.1.2. Forecasts

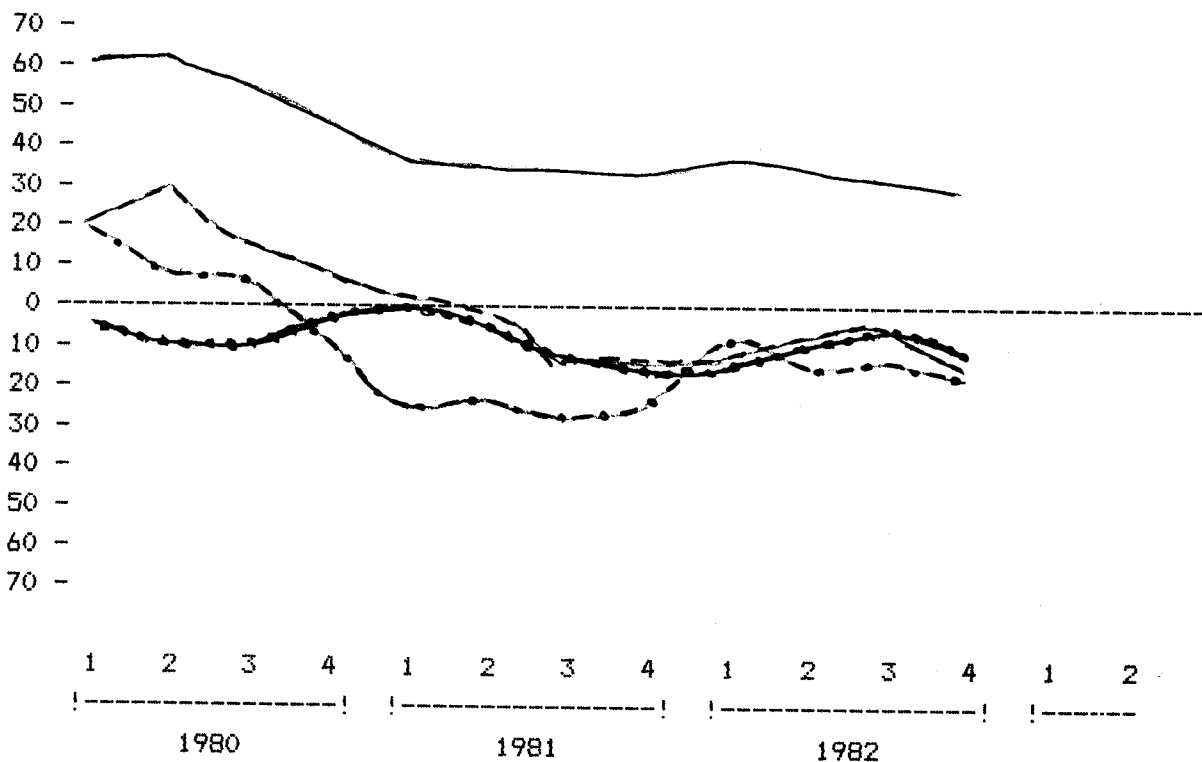
The expected fall in the level of activity in the third quarter of 1982 and continued fall in the fourth quarter (see Figure 4.1., moving average forecast) indicates a deepening recession.

Forecasts on the utilisation of total, capacity on the Rhine for the fourth quarter of 1982 shows a continuation of the drop which began in the second quarter. The forecasts of the utilisation of total capacity for the third and fourth quarters of 1982 are regressing when compared to the same quarter of 1981.

Figure 4.2. Rhine: Indicators of forecast for 4 important NST-groups

(moving averages)

Aggregate balance of opinions (in percentage)



4 quarter moving average forecast activity

- coal etc. (NST 2)
- sand/gravel etc. (NST 6)
- oil etc. (NST 3)
- ore etc. (NST 4)

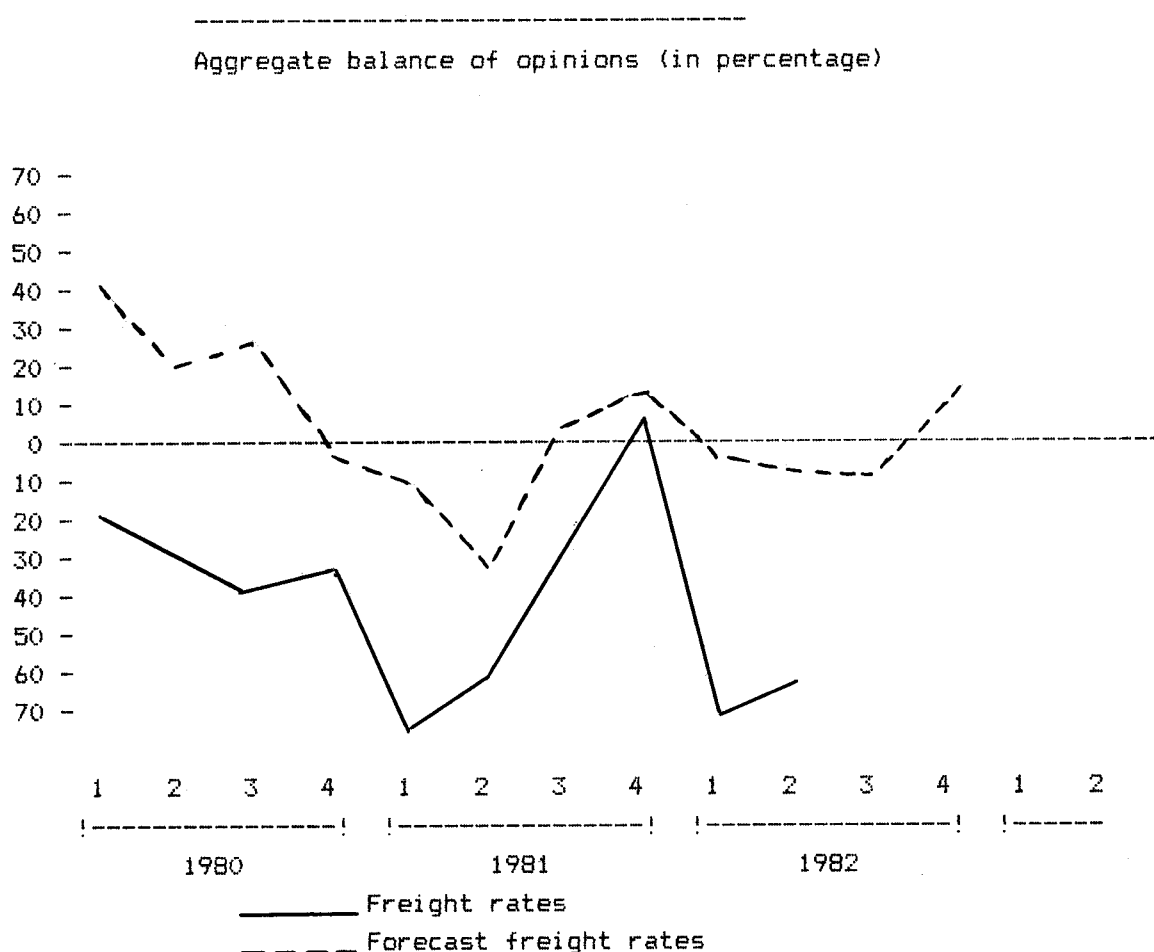
The moving average forecasts for the transport of different goods categories (Figure 4.2.) shows that, in the opinion of the shippers questioned, there is a downward tendency for solid mineral fuels for the third and fourth quarters of 1982. After an expected upturn in the third quarter of 1982 for ores, construction materials and petroleum products, the situation will deteriorate in the fourth quarter. According to the specialised press, no improvement can be expected in these sectors in the near future. Additionally there are few empty returns to Rotterdam, most shippers preferring to wait for a return load, causing lower utilisation.

#### 4.1.3. Freight rates

After a spectacular fall in rates in the first quarter of 1982, shippers feel that there has been an improvement in quarter two, where rates were higher than in the same quarter of 1981.

Although an important drop in traffic is forecast for the last two quarters of 1982, it is expected that rates will remain stable in quarter three, and improve in quarter four. This contrasts with specialised press reports of a drop in freight rates as a result of the existing overcapacity on the Rhine.

Figure 4.3. Rhine: developments in freight rates



#### 4.2. North-South traffic

4.2.1. The inquiry survey of activity for the third quarter of 1982 amongst Belgian and Dutch waterway transporters shows that activity is substantially down against the second quarter (this is a normal seasonal adjustment) and against the third quarter of 1981 which indicates a more than usual decline in activity in this quarter. The balance of opinion during 1982 is:

Q1	Q2	Q3
-57	-28	-67

Tables 4.1. and 4.2. show the changes between the second and third quarters for (a) the bilateral relations and (a) the different tonnage classes.

Table 4.1. : Changes in activity assessment Q3 over Q2 by bilateral relation.

-----				legend for tables 4.1. and 4.2.
To From	B	F	N	
B	--	++	--	negative: over 7% --- 2 - 7% -
F	--		++	no change: =
N	--	++	+	positive: 2 - 7% + over 7% ++

Table 4.2. : Changes in activity assessment Q3 over Q2 by tonnage class.

Tonnage class	Belgian shippers	Dutch shippers	Total
200-450	--	-	--
451-750	--	+	+
751-1150	--	++	--
1151-1500	-	++	++
1501	--	++	++

The positive signs shown in Tables 4.2. and 4.3. merely reflect a relative improvement in a continuing depressed market.

Waiting Time

In addition to these surveys the number of waiting days at the "bourse" is an important indicator of the development of activity in relation to capacity available.

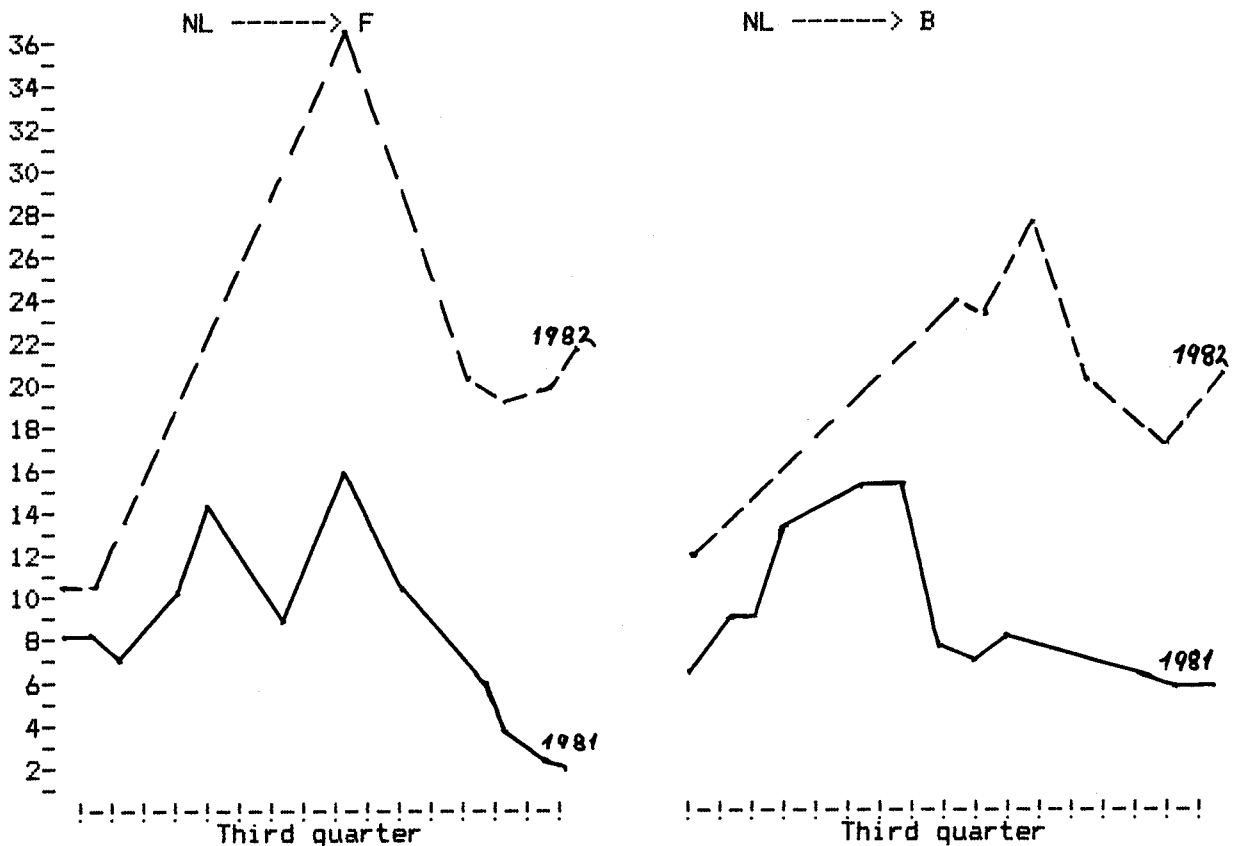
Table 4.3. and the subsequent figures illustrate the important seasonal and trend changes in this indicator.

Table 4.3. : Quarterly average of waiting days in international north-south traffic

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

\* Domestic traffic included

Figure 4.4 : Weekly average of waiting days in the relations from the Netherlands to Belgium and France.

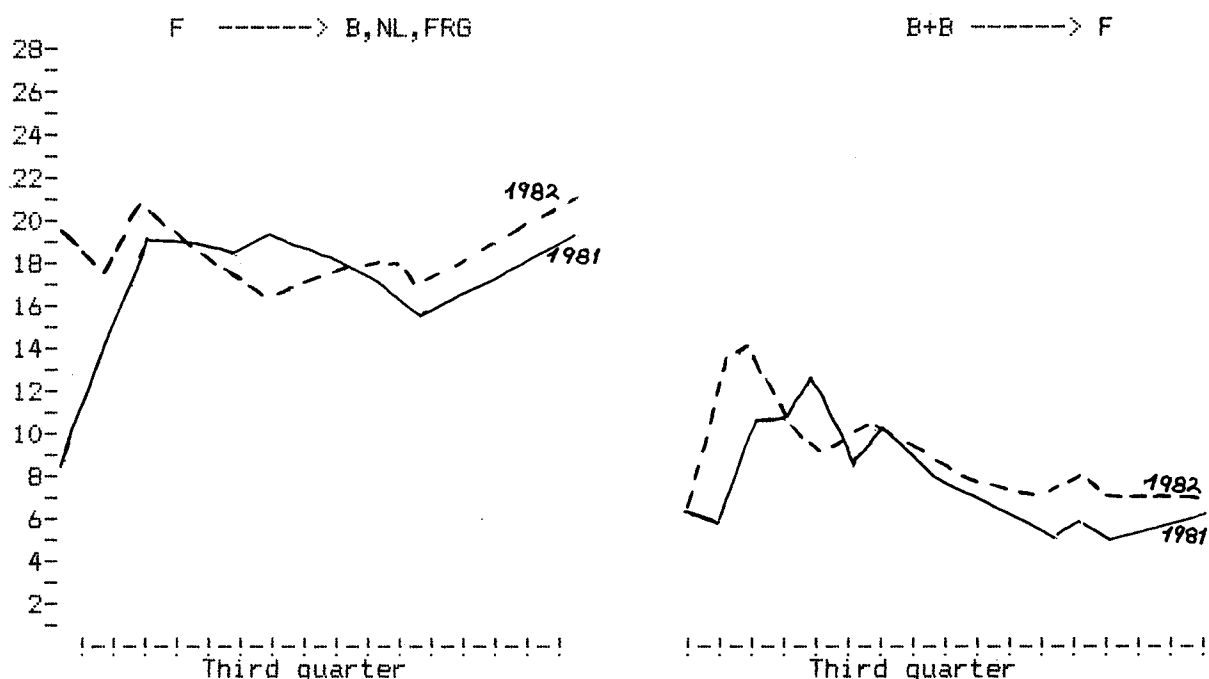


In the relations Netherlands to Belgium and France, there was a considerable increase in waiting time.

This was partly due to the fact that following

- (i) a sharp drop in ore traffic on the Rhine starting in July;
- (ii) a subsequent decline in freight rates; and
- (iii) depression on the sand and gravel market waterway transporters turned to the regulated North-South market. These factors were not compensated by the seasonal increase in transport of agricultural products.

Figure 4.5. Weekly average of waiting days in North-South traffic from France and in the relation Belgium to France, including Belgium domestic traffic.



#### 4.2.2. Border crossings

The considerable increase in the average number of border crossings by unladen ships, noted during the second quarter, flattened out at a rather high level. About 30 per cent of all border crossings are made by unladen ships. This phenomenon might be influenced by the differences in waiting time on the different markets.

#### 4.2.3. Prices

A majority of shippers were of the opinion that freight rates were further down compared to the previous quarter (-27 in quarter three as against +20 and -8 during the first and second quarters respectively).

#### 4.2.4. Forecasts : Uncertainty

Forecasts by inland waterway transporters of the demand for transport services for the fourth quarter 1982 are in general less pessimistic than those for the third quarter. However, there are differences in the opinions of Belgian and Dutch shippers as is shown in the following table.

Table 4.4. : Balance of opinion on forecasts of activity in the next quarter

Country	Year	Q1	Q2	Q3	Q4
B	1982	-10	-23	-33	-40
N	1982	-15	- 8	-48	- 6

Despite the positive seasonal influence to be expected during the fourth quarter Belgian shippers are more pessimistic for this quarter than they were for the third quarter.

Table 4.5 suggests that waterway transporters in Belgium and the Netherlands expect less negative developments on freight rates.

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

Country	Year	Q1	Q2	Q3	Q4
B	1982		-10	- 8	0
N	1982		-12	- 8	0



## SECTION 5 : COMBINED TRANSPORT

---

For the first time the quarterly report includes an analysis of combined transport. These following comments have been established with the assistance of INTERCONTAINER (Société internationale pour le Transport par Transcontainers) for the container traffic and of INTERUNIT (Société internationale pour le transport par ferroutage) for the piggy-back traffic. This includes rail and Piggy-Back Companies (\*).

### 5.1. Container traffic

---

5.1.1. These comments on international rail container traffic concern movements between and in transit through Community countries and also entering and leaving the Community by rail.

Movements of loaded containers by European railways fell again in the 3rd quarter to lie 13% below those of the corresponding period of 1981. The aggregate position for 1982 (9) months is for a volume of traffic below that of 1981.

5.1.2. International movements of containers by rail thus reflect the general state of the international transport market. The deterioration in the 3rd quarter reflects mainly a diminution of traffic to and from the container ports (15% below 1981). Inter European traffic has remained close to last year's level (-4%). Gains have been noted in traffic to and from Greece (new seasonal services) and between Italy and Belgium and the Netherlands in inter Community traffic.

Traffic between Community countries and Spain is increasing, though the total remains modest.

5.1.3. The flows of containers to and from Italian ports for shipment are also rising again strongly, although a slowdown of orders from the oil producing Arab countries may later affect these flows adversely. Container flows to and from German ports from Austria, Switzerland and Eastern Europe remain positive compared to 1981. There are indications that this may possibly be weakening towards the end of the year.

Rail container flows to and from Belgian and the Dutch ports are again falling in the 3rd quarter partly as a result of reduced demand and partly by transfer to inland waterway services. Flows between France and Germany, both in the Community container traffic and traffic to and from French mediterranean ports, have declined sharply.

5.1.4. The outlook at this moment (mid-November) is for stagnation in overall demand and of depressed transport prices in most areas as a reflection of overcapacity.

5.1.5. Rail container rates have increased by about 7,5% on average since mid-1981 (all European border crossing flows, but with wide variations by route).

## 5.2 Piggy-Back Transport (\*\*)

---

- 5.2.1. Piggy-Back transport has enjoyed a positive evolution for several years. Together, the first three quarters of 1982 in comparison with the same period of the previous year, showed a positive growth rate (more than 25%) but through 1982 one could observe a certain deceleration.

Table 5.1. Year-on-year comparison of quarterly growth rates

---

Q1 82	Q2 82	Q3 82
Q1 81	Q2 81	Q3 81
+42	+31.4	+10.5

- 5.2.2. The third quarter of 1982 showed a large drop over the previous quarter, much more than could be attributed to normal seasonal factors.

Table 5.2. Comparison of quarterly growth rates

---

Q3 81	Q3 82
Q2 81	Q2 82
- 2.5	-18

- 5.2.3. This slowing down in growth probably results from a number of factors including :
- decline in the level of economic activity
  - deterioration in the competitive position of piggy-back in relation to classical road transport
  - further decline in traffic is possible given to flexibility of road transport to adopt more quickly.
- 5.2.4. The heaviest piggy-back traffic is on the north/south axis. In 1982 traffic to Italy accounted for nearly 30% of the total and nearly 50% in the opposite direction. All the companies active on these routes recorded a higher-than-seasonal decline between the second and third quarter 1982. Additionally, the piggy-back companies themselves are expecting a worsening of the situation in the months to come.

(\*) International Union of Combined Rail-Route Transport Companies

Germany	: KOMBIVERKEHR	France	: NOVATRANS
Netherlands	: TRAILSTAR	Switzerland	: HUPAC
Belgium	: T.R.W.	Italy	: CEMAT and FEPAC
Spain	: TRANSNOVA		

(\*\*) Calculations have been made on the basis of present data, and are subject to change as further figures become available.

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