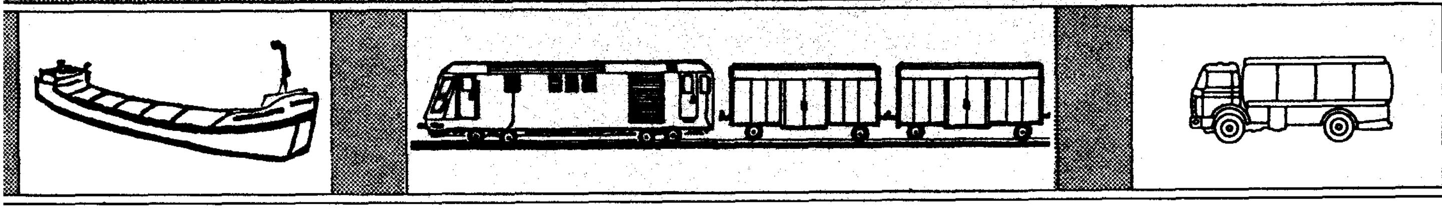
EUROPEAN COMMUNITIES

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, were restructured in 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, inland waterway and combined transport;
- the results of quarterly opinion surveys carried out among international road hauliers;
- the results of six-monthly cost 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 results of six-monthly cost surveys carried out among international inland waterway carriers;
- the results of quarterly price indices for international rail movements.

The surveys are undertaken by various organisations in the Member States; the list of these organisations is given in Annex 1.

SECTION 1

GENERAL MARKET ASSESSMENT - ALL MODES

The total tonnage for all three modes in the third quarter 1983 was up 4.2 % on the same quarter of the previous year.

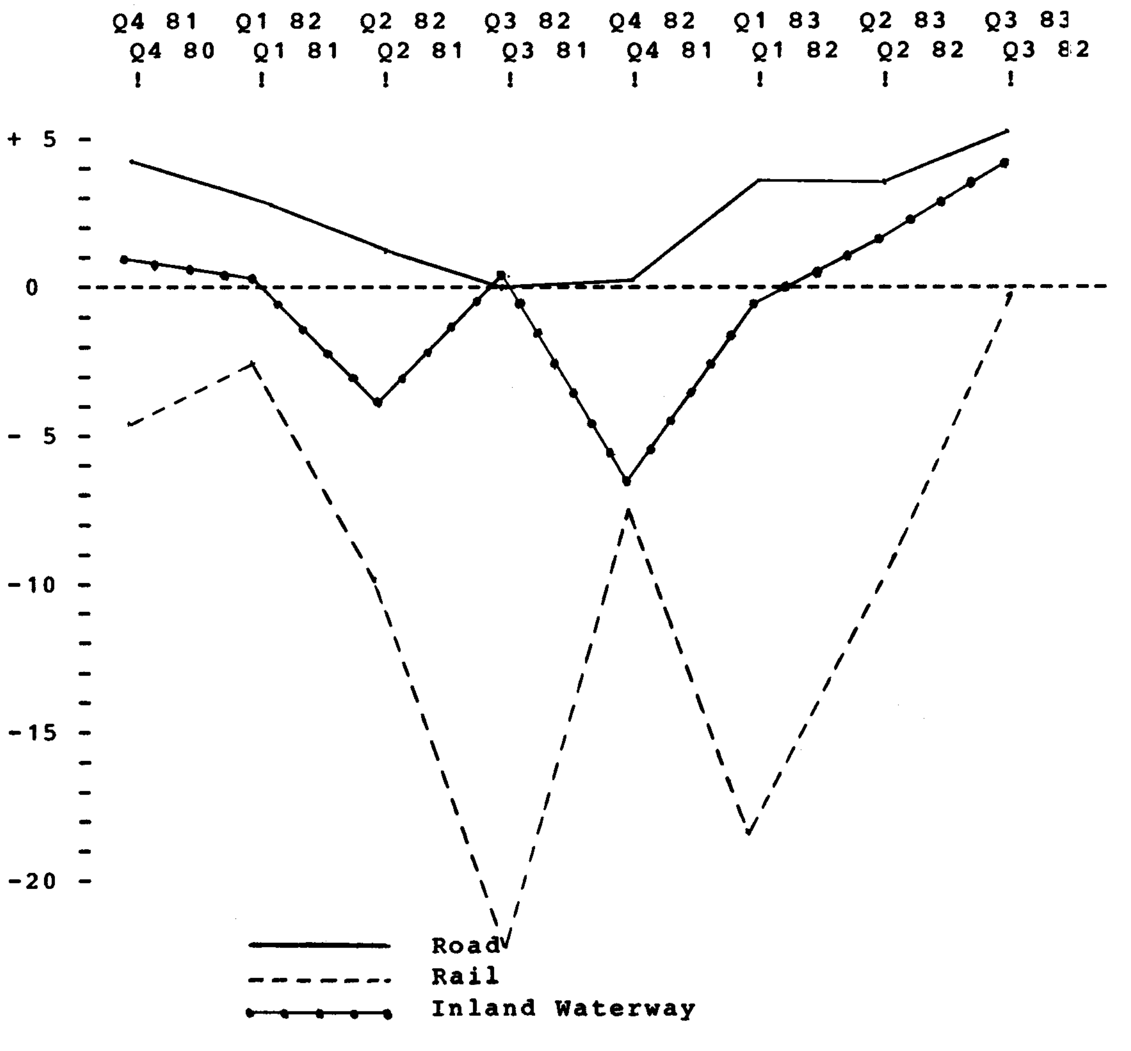
But as usual, each of the three modes registered different improvements.

1.1. Trends for individual modes

Table 1.1. : Growth rates by mode of transport (percentage of change of a particular quarter on the corresponding quarter of the previous year).

Year / Mode	Q4 81 / Q4 80	Q1 82 / Q1 81	Q2 82 / Q2 81	Q3 82 / Q3 81	Q4 82 / Q4 81	Q1 83 / Q1 82	Q2 83 / Q2 82	Q3 83 / Q3 82
Road	+4.2	+2.9	+1.3	0.0	+0.4	+3.6	+3.6	+5.9
Rail	-4.6	-2.7	-10.2	-21.9	-7.8	-18.3	-9.4	-0.1
I.W.	+0.8	+0.1	-3.9	+0.1	-6.7	-0.5	+1.6	+4.2
Total	+1.2	+0.6	-3.0	-3.1	-4.1	-1.7	+0.7	+4.2

Figure 1.1. : Graphic representation of growth rates by mode



1.2. Modal split

Table 1.2. International EUR-7 (1) in million tonnes (2)

Mode	Q3 83	Q3 82	% Change	% Modal share Q3, 83	% Modal Q3 Share 82
Road	39.8	37.6	+5.9	40.1	39.5
Rail	12.4	12.5	-0.1	12.5	13.1
I.W.	47.0	45.1	+4.2	47.4	47.4
Total	99.2	95.2	+4.2	100	100

Although rail has made the best improvement of the three modes, in comparison with quarter two 1983, it still remains slightly negative at roughly the same level as the third quarter of 1982, despite an increase in total tonnage of 4.2 % for the same period.

The drop in the market share suffered by rail was accounted for by a matching increase in the road share, inland waterways remaining constant.

1.3. Total transport activity Q1 + Q2 + Q3

In the first nine months of 1983, total transport activity measured in tonnes moved, increased by 1.0 % compared to the first three quarters of 1982.

By mode, the developments were as follows :

Table 1.3.

	Q3 83/Q3 82	(Q1+Q2+Q3)83/(Q1+Q2+Q3)82
Road	+ 5.9 %	+ 4.3 %
Rail	- 0.1 %	-10.0 %
I.W.	+ 4.2 %	+ 1.8 %
All modes	+ 4.2 %	+ 1.0 %

(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.

1.4. United Kingdom, Ireland and Greece

1.4.1. United Kingdom

In the third quarter of 1983 the number of vehicles carried from the UK to mainland Europe was 200,000. This represents an 8 percent increase over the second quarter but is 15 percent higher than for the third quarter of 1982.

Most of the increase was in powered vehicles. Their numbers were up by 14 percent over the previous quarter compared to a 2 percent increase for trailers.

Traffic to Belgian and Dutch ports increased more than average. It was up 18 percent and 10 percent, respectively, on the previous quarter.

1.4.2. Ireland

The refrigerated freight market recorded a significant increase due to :

- the increase of meat exports (seasonal effect)

- the increase of fruit imports

This led to a better cash flow position for most of Irish hauliers.

Rates appear to have increased slightly but at a lower rate than that of the Irish consumer price indices.

The general short-term economic outlook shows little change.

1.4.3. Greece

Total traffic by road in the third quarter of 1983 shows a slight increase on the third quarter of previous year.

Biggest increases can be noted for importations from the Netherlands and from Italy while exports to France decreased.

SECTION 2

ROAD

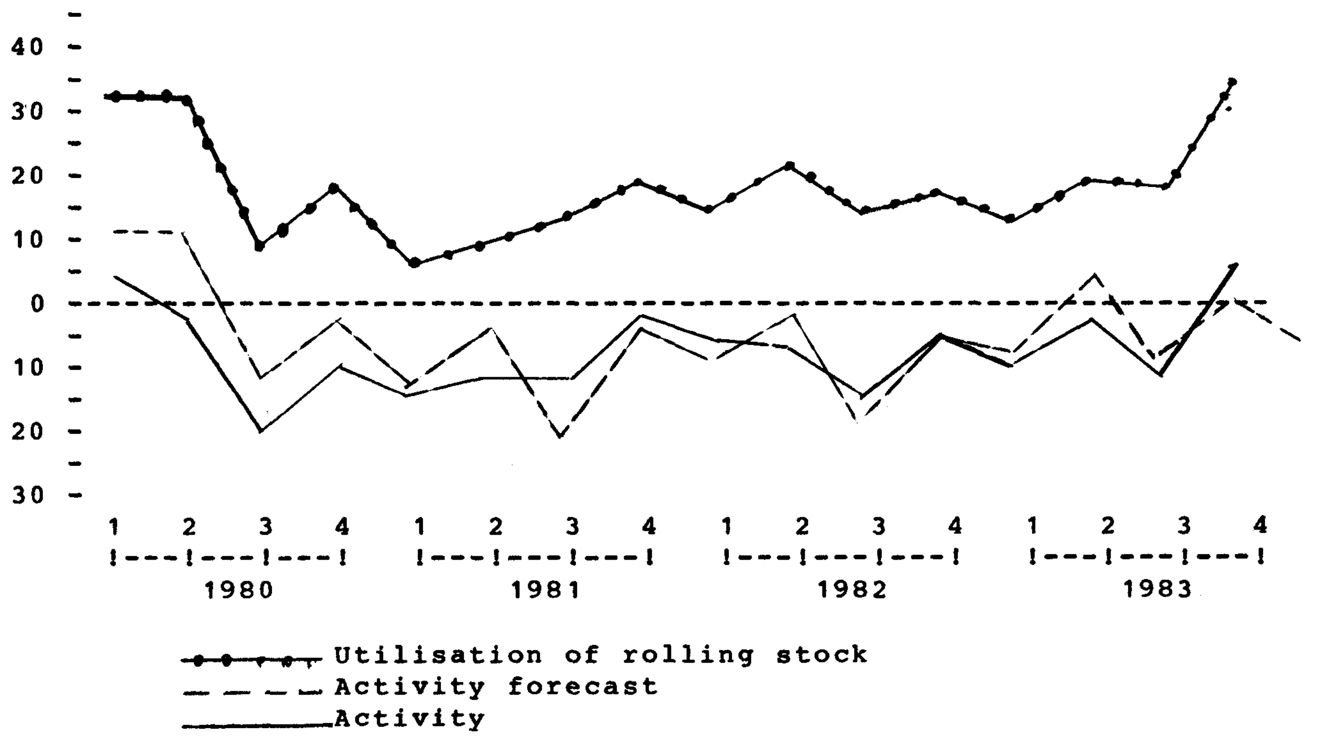
2.1. Road Inquiry Survey

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

Road transport improves

The inquiry for the last quarter of 1983 indicates an important improvement in the activity level of road transport. Although this appears to be a seasonal tendency it should be noted that it is much stronger than in the preious year. Compared to the corresponding quarter of 1982 there is a marked improvement.

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



(2)

2.1.2. Activity : Upwards swing

For the last quarter of 1983, the balance of opinion (% difference between positive and negative replies) improved by 17 points in comparison to the previous quarter.

2.1.3. Forecasts : Seasonal factors dominate

The expectations for the first quarter of 1984 show the typical seasonal change : a deterioration of 8%.

Since this deterioration is larger than it was last year, this could indicate that hauliers still do not have full confidence in the business climate. Exceptions are Germany and Luxembourg, where a further improvement of 8% resp. 7% is expected.

However, the level of activity expected for the first quarter of 1984 is 6% higher than the same quarter the year before.

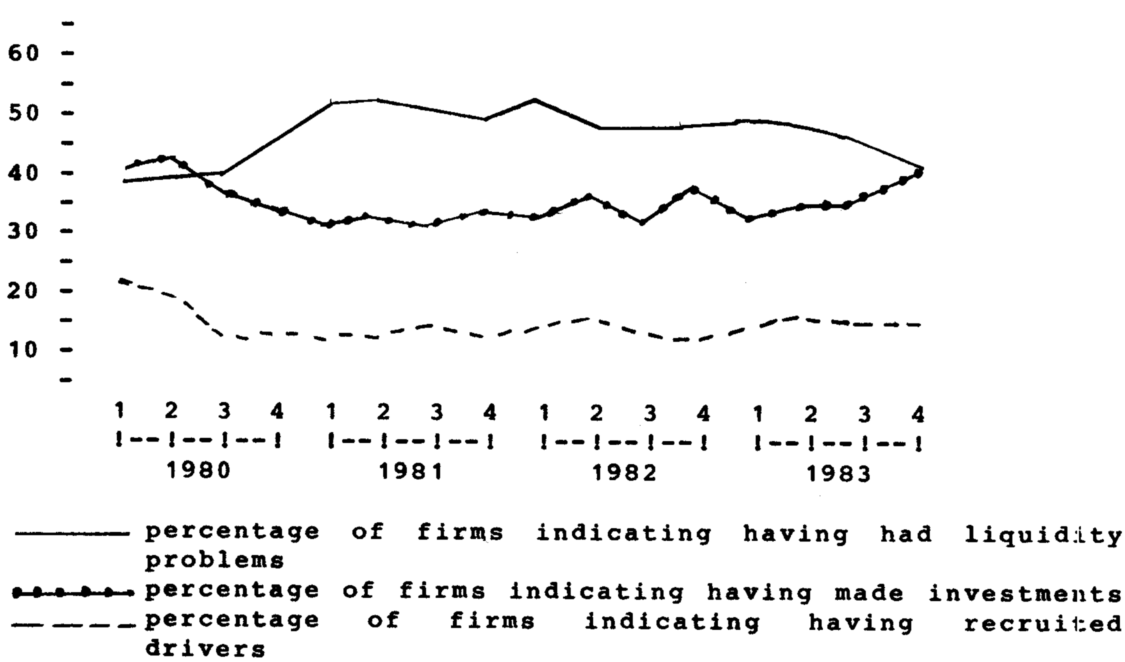
2.1.4. Utilisation of rolling stock

The use of the rolling stock has increased a lot during the fourth quarter of 1983, as could be expected given the upswing in the activity level (+ 15%, as measured by the balance between + and -). Compared to the same quarter in 1982 the balance has doubled.

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

The main phenomenon is the increase in investment (except for the UK and the Netherlands where a stabilisation seems to have taken place).

Figure 2.2.: Economic Indicators



2.1.6. Recruitment :

The percentage of firms having recruited drivers is 3 percentage points lower than the previous quarter. Compared to the same quarter the year before there is a 2% improvement.

2.1.7. Cash-flow problems : Further improvement

The percentage of firms facing cash-flow problems has declined in comparison to the third quarter by 5%. The number of firms having cash-flow problems is particularly low in the Netherlands and Denmark ((3% and 6% resp.).

In Greece (67%), Italy (63%), and France (59%) the majority of firms report cash-flow problems.

2.1.8. Investments : Significant improvement

At 41% the number of hauliers having made investments has risen by 6% compared to the third quarter. Compared to the same quarter in 1982, investment activity is 3% higher.

Tab. 2.1.

ROAD TRANSPORT SURVEY																	
ECT-0311													4. QUARTER 1983				
INTERNATIONAL TRANSPORT ACTIVITY													FORECAST : 1. QUARTER 1984				
COUNTRY		1981				1982				1983				1984			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEUTSCHLAND	+	20	18	19	20	22	19	18	23	23	24	21	23	17			
	=	46	54	48	49	49	55	44	44	48	45	48	53	73			
	-	34	28	33	31	29	26	38	33	29	31	31	24	10			
	S	-14	-10	-14	-11	-7	-7	-20	-10	-6	-7	-10	-1	7			
FRANCE	+	16	14	16	21	18	15	14	15	14	15	11	17	12			
	=	41	47	47	47	47	49	50	43	43	49	47	51	55			
	-	43	39	37	32	35	36	36	42	43	36	42	32	33			
	S	-27	-25	-21	-11	-17	-21	-22	-27	-29	-21	-31	-15	-21			
ITALIA	+	15	15	17	18	15	16	14	15	14	15	17	23	20			
	=	41	44	42	53	49	47	41	51	45	54	47	49	55			
	-	44	41	41	29	36	37	45	34	41	31	36	28	25			
	S	-29	-26	-24	-11	-21	-21	-31	-19	-27	-16	-19	-5	-5			
NEDERLAND	+	30	20	25	26	34	32	26	31	31	37	26	40	10			
	=	41	65	49	52	43	45	41	50	44	44	38	42	71			
	-	29	15	26	22	23	23	33	19	25	19	36	18	19			
	S	1	5	-1	4	11	9	-7	12	6	18	-10	22	-9			
BELGIQUE-BELGIE	+	25	28	22	31	28	31	23	30	27	28	21	35	21			
	=	46	41	43	44	48	51	43	47	46	51	44	47	62			
	-	29	31	35	25	24	18	34	23	27	21	35	18	17			
	S	-4	-3	-13	6	4	13	-11	7		7	-14	17	4			
LUXEMBOURG	+	25	27	12	26	28	26	21	25	21	35	26	21	23			
	=	46	49	51	61	48	50	51	47	52	49	52	61	64			
	-	29	24	37	13	24	24	28	28	27	16	22	18	13			
	S	-4	3	-25	13	4	2	-7	-3	-6	19	4	3	10			
UNITED KINGDOM	+	23	21	24	28	28	25	21	24	23	24	20	26	21			
	=	49	53	56	59	59	56	63	64	61	63	63	66	75			
	-	28	26	20	13	13	19	16	12	16	13	17	8	4			
	S	-5	-5	4	15	15	6	5	12	7	11	3	18	17			
IRELAND	+	18	24	21	25	21	27	20	28	21	23	23	21	15			
	=	30	47	39	40	48	39	38	37	47	50	60	60	60			
	-	52	29	40	35	31	34	42	35	32	27	17	19	25			
	S	-34	-5	-19	-10	-10	-7	-22	-7	-11	-4	6	2	-10			
DANMARK	+	24	20	21	24	25	26	17	27	26	19	19	29	15			
	=	57	65	61	61	65	64	61	62	66	65	64	64	72			
	-	19	15	18	15	10	10	22	11	8	16	17	7	13			
	S	5	5	3	9	15	16	-5	16	18	3	2	22	2			
HELLAS	+				27	16	14	17	28	19	32	24	29	16			
	=				47	45	31	34	36	39	39	43	43	53			
	-				26	39	55	49	36	42	29	33	28	31			
	S				1	-23	-41	-32	-8	-23	3	-9	1	-15			
E.E.C.	+	20	19	20	24	22	21	19	23	21	24	19	26	16			
	=	44	50	47	50	50	50	46	49	48	50	49	52	64			
	-	36	31	33	26	28	29	35	28	31	26	32	22	20			
	S	-16	-12	-13	-2	-6	-8	-16	-5	-10	-2	-13	4	-4			

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

Tab. 2.2.

ROAD TRANSPORT SURVEY

ECT-0321 4. QUARTER 1983

UTILISATION OF ROLLING STOCK

COUNTRY		1981				1982				1983				1984			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEUTSCHLAND	+	26	28	21	29	33	28	20	19	27	31	27	33				
	=	50	53	52	47	49	51	51	54	51	51	51	50				
	-	24	19	27	24	18	21	29	27	22	18	22	17				
FRANCE	+	36	37	44	46	29	42	27	30	22	29	27	30				
	=	20	27	25	25	35	24	40	41	41	37	43	44				
	-	44	36	31	29	36	34	33	29	37	34	30	26				
ITALIA	+	14	14	18	17	15	14	17	12	11	14	22	36				
	=	48	55	59	62	64	62	52	64	54	69	57	49				
	-	38	31	23	21	21	24	31	24	35	17	21	15				
NEDERLAND	+	49	46	47	53	51	60	38	41	42	63	51	69				
	=	32	42	36	37	37	35	40	45	46	30	40	30				
	-	19	12	17	10	12	5	22	14	12	7	9	1				
BELGIQUE-BELGIE	+	28	33	31	41	41	56	39	45	48	57	54	57				
	=	48	46	51	45	43	34	42	41	40	33	37	36				
	-	24	21	18	14	16	10	19	14	12	10	9	7				
LUXEMBOURG	+	29	37	29	28	19	21	14	37	38	39	38	42				
	=	57	56	57	65	74	68	72	50	53	58	49	55				
	-	14	7	14	7	7	11	14	13	9	3	13	3				
UNITED KINGDOM	+	42	45	48	68	65	62	58	69	60	69	61	69				
	=	33	34	36	25	26	22	23	24	30	20	27	24				
	-	25	21	16	7	9	16	19	7	10	11	12	7				
IRELAND	+	28	30	31	36	34	30	30	46	37	49	43	86				
	=	40	40	38	36	37	40	47	41	39	30	41	8				
	-	32	30	31	28	29	30	23	13	24	21	16	6				
DANMARK	+	42	39	41	46	49	47	43	54	55	44	46	57				
	=	45	47	47	40	43	47	44	41	37	43	43	39				
	-	13	14	12	14	8	6	13	5	8	13	11	4				
HELLAS	+				23	17	14	8	27	17	15	25	35				
	=				56	54	29	31	39	41	50	41	49				
	-				21	29	57	61	34	42	35	34	16				
E.E.C.	+	33	33	34	39	35	41	30	36	34	38	37	46				
	=	39	43	44	41	44	39	44	45	43	43	44	41				
	-	28	24	22	20	21	20	26	19	23	19	19	13				

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

Tab. 2.3.

ROAD TRANSPORT SURVEY

ECT-0331 4. QUARTER 1983

PERCENTAGE OF FIRMS INDICATING HAVING RECRUITED DRIVERS

COUNTRY	1981				1982				1983				1984			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEUTSCHLAND	5	3	4	2	5	5	3	2	6	5	8	5				
FRANCE	4	3	4	4	5	3	4	4	6	3	3	3				
ITALIA	22	29	28	22	21	24	18	16	17	25	19	20				
NEDERLAND	15	19	14	11	18	19	19	8	15	25	18	16				
BELGIQUE-BELGIE	17	18	19	10	21	26	19	15	18	22	21	15				
LUXEMBOURG	35	30	14	27	21	31	28	27	42	35	44	28				
UNITED KINGDOM	12	10	19	25	21	19	20	21	18	26	25	22				
IRELAND	24	12	12	24	17	15	10	19	21	15	27	24				
DANMARK	12	8	17	7	14	20	6	11	10	13	15	12				
HELLAS				40	36	24	25	20	29	28	25	19				
E.E.C.	12	12	14	11	14	15	12	10	13	15	15	12				

Tab. 2.4.

ROAD TRANSPORT SURVEY

ECT-0341 4. QUARTER 1983

PERCENTAGE OF FIRMS INDICATING HAVING LIQUIDITY PROBLEMS

COUNTRY	1981				1982				1983				1984			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEUTSCHLAND	43	44	39	42	40	39	40	62	31	26	29	20				
FRANCE	67	66	64	61	64	60	60	57	64	65	59	59				
ITALIA	65	72	70	70	72	76	69	70	76	76	68	63				
NEDERLAND	19	16	18	15	18	12	11	10	13	6	7	3				
BELGIQUE-BELGIE	27	39	28	32	32	27	26	31	27	26	21	21				
LUXEMBOURG	63	15	43	27	57	38	40	42	27	16	19	15				
UNITED KINGDOM	64	57	57	51	56	49	53	50	49	44	42	41				
IRELAND	79	59	53	51	58	58	50	59	59	55	42	43				
DANMARK	26	23	31	29	32	21	32	18	20	19	17	6				
HELLAS				63	54	76	79	69	72	68	76	67				
E.E.C.	53	53	51	50	53	49	49	49	50	49	46	41				

Tab. 2.5.

ECT-0351

ROAD TRANSPORT SURVEY

PERCENTAGE OF FIRMS INDICATING HAVING MADE INVESTMENTS

4. QUARTER 1983

COUNTRY	1981				1982				1983				1984			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEUTSCHLAND	32	28	32	30	27	35	30	34	34	44	39	52				
FRANCE	31	30	27	34	34	35	31	42	29	29	29	34				
ITALIA	26	29	26	27	26	25	21	20	18	24	25	34				
NEDERLAND	38	44	36	47	46	42	43	46	41	47	44	44				
BELGIQUE-BELGIE	30	36	30	29	30	39	32	38	42	40	42	46				
LUXEMBOURG	17	22	21	33	26	29	28	47	38	20	47	39				
UNITED KINGDOM	30	52	50	49	53	63	61	67	49	67	68	65				
IRELAND	28	27	30	29	25	22	27	19	31	24	44	46				
DANMARK	35	39	44	40	43	45	35	42	43	51	51	55				
HELLAS				46	33	42	24	29	42	34	34	37				
E.E.C.	31	33	31	34	33	36	32	38	33	35	35	41				

2.2. Cost Indices

2.2.1. Coverage

Six-monthly surveys are now being conducted on costs in Germany, France the Netherlands, Belgium /Luxembourg, UK and Denmark. Results have not yet been received from Italy, Ireland and Greece. Cost structures have been received from UK. They cover the second half of 1983. The German and the Dutch surveys give a breakdown of the cost factors by geographical relations.

For this survey, no data have been received from Belgium and Denmark.

2.2.2. Methodology

Indices for fuel are shown separately (tables 2.6. and 2.7.; and figure 2.3.), as allowance is made for the differences in cost of fuel estimated to be bought in each Member State. The indices for the other cost factors are based on the costs in the country of the hauliers. 1st January 1982 is used as the base point, and the indices are expressed in national currency and in ECU. Total costs are given in Tables 2.8. and 2.9. as well as in figures 2.4. and 2.5.

2.2.3. Overall costs developments : Second half of 1983

In national currency, total costs increased slightly for UK (0,3%) and Germany (1%).
An increase of 2.6% and 2.4% is noted respectively for France and the Netherlands.

In ECU, we noted a small increase for UK (0.3%) and for France (1.3%). A more important increase is noted for Germany (2%) and the Netherlands (3%).

The German and Dutch surveys give a breakdown of the total costs by geographical relations. For the Netherlands, there is an increase for all Member States varying between 2.5% (Greece) and 3.7% (Belgium).

For Germany, there is an increase for all Member States between 1.3% (Greece) and 2.5% (France).

2.2.4. Fuel cost developments : Second half of 1983

In national currency fuel costs increased for all the Member States. Just for UK there is no change.
We noticed an important increase for the Netherlands (5.8%), and lower increases for Germany (3.3%) and France (0.9%).

In ECU, fuel costs increased very much for Netherlands (6.5%) and for Germany (4.3%). We also notice a slight decrease for France (0.2%) and a slight increase for UK (0.5%).

Table 2.6. : Fuel cost in national currency

		1.1.79	1.1.80	1.1.81	1.7.81	1.1.82	1.7.82	1.1.83	1.7.83	1.1.84
Germany	(DM)	57,5	74,1	86,5	93,6	100,0	96,8	99,1	91,4	94,7
France	(FF)	53,1	66,5	86,2	95,1	100,0	108,2	117,2	117,6	118,5
Netherland	(HFL)	57,0	77,0	86,0	94,4	100,0	99,0	99,4	91,9	97,7
B/L	(BFR)	47,7	66,9	78,9	90,0	100,0	102,2	105,4	106,7	
U.K.	(UKL)	49,8	70,7	82,6	102,4	100,0	102,4	111,5	110,7	110,7
Denmark	(DKR)			78,1	95,8	100,0	100,0	118,0	108,2	

Table 2.7. : Fuel cost in ECU

	1.1.79	1.1.80	1.1.81	1.7.81	1.1.82	1.7.82	1.1.83	1.7.83	1.1.84
Germany	56,0	72,7	81,9	90,7	100,0	100,2	105,5	98,3	102,6
France	57,2	70,9	89,8	98,6	100,0	102,3	111,8	106,8	106,6
Netherland	56,3	75,1	82,3	90,1	100,0	101,7	105,3	96,7	103,2
B/L	50,1	68,9	79,1	90,7	100,0	94,4	97,3	97,5	
U.K.	41,5	62,7	87,4	105,0	100,0	104,8	103,3	108,8	109,3
Denmark			78,5	98,6	100,0	97,7	116,6	105,7	

Table 2.8. : Total cost indices in national currency

		1.1.79	1.1.80	1.1.81	1.7.81	1.1.82	1.7.82	1.1.83	1.7.83	1.1.84
Germany	(DM)	79,6	86,3	94,6	98,8	100,0	102,3	102,4	102,5	103,5
France	(FF)	63,3	73,0	86,3	94,8	100,0	108,5	113,8	121,1	123,7
Netherland	(HFL)	77,9	86,6	92,5	96,4	100,0	101,1	102,5	100,8	103,2
B/L	(BFR)	71,6	79,6	88,8	93,6	100,0	105,6	109,0	111,2	
U.K.	(UKL)	63,0	77,3	91,5	99,2	100,0	106,0	108,4	112,8	113,1
Denmark	(DKR)			88,3	95,1	100,0	102,5	111,6	110,3	

Table 2.9.: Total cost indices in ECU

	1.1.79	1.1.80	1.1.81	1.7.81	1.1.82	1.7.82	1.1.83	1.7.83	1.1.84
Germany	77,5	84,7	89,6	95,8	100,0	105,9	109,0	110,2	112,2
France	68,3	77,8	89,8	98,2	100,0	102,6	108,5	110,0	111,3
Netherland	77,1	84,5	88,3	92,1	100,0	103,8	108,6	106,1	109,1
B/L	75,2	82,0	89,1	94,3	100,0	97,5	100,7	101,6	
U.K.	72,2	79,4	92,1	100,2	100,0	103,6	107,1	110,3	110,6
Denmark			88,8	96,1	100,0	100,1	110,2	107,8	

FUEL COSTS IN ECU

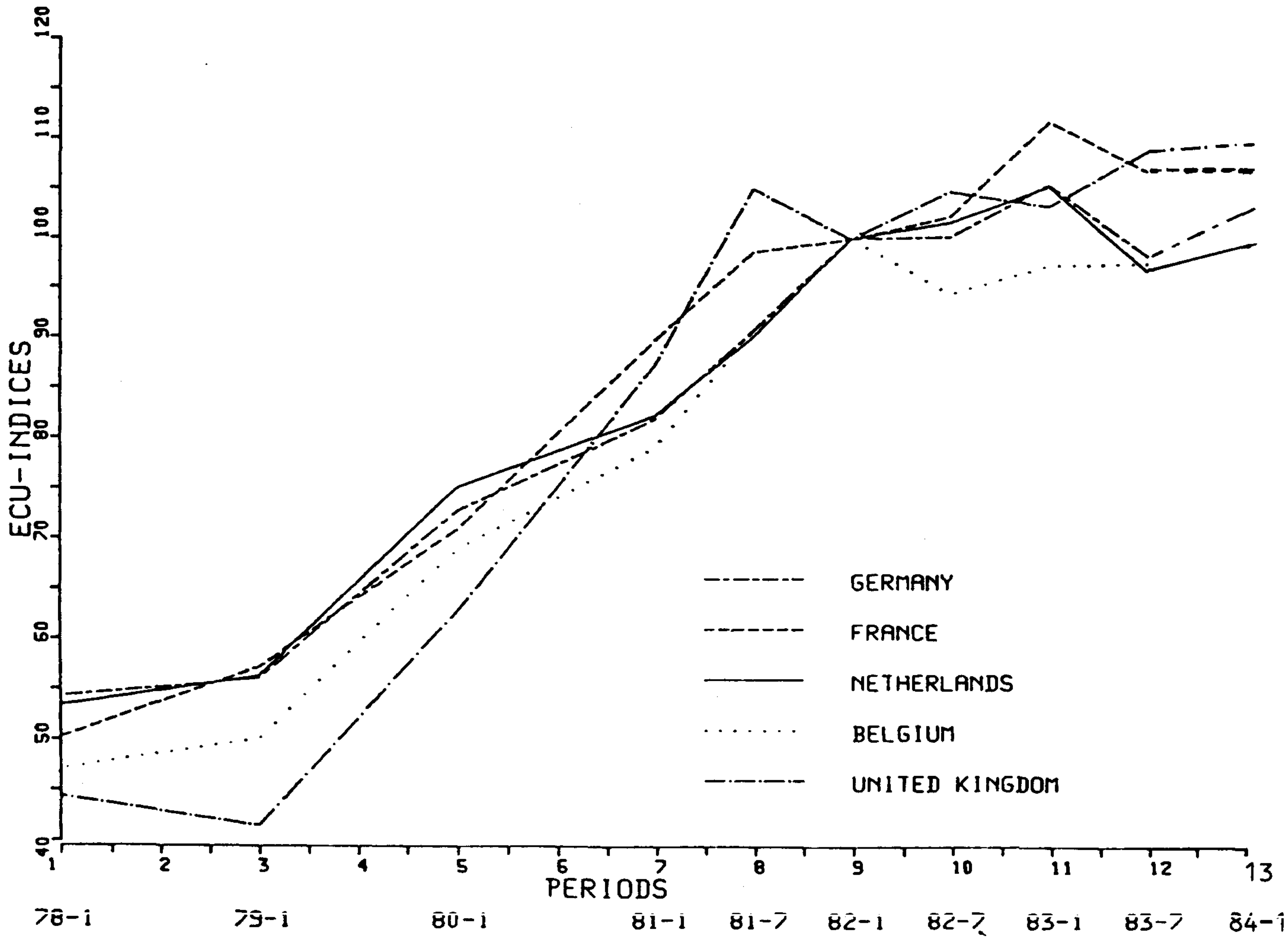


figure 2.4.

TOTAL COSTS IN ECU

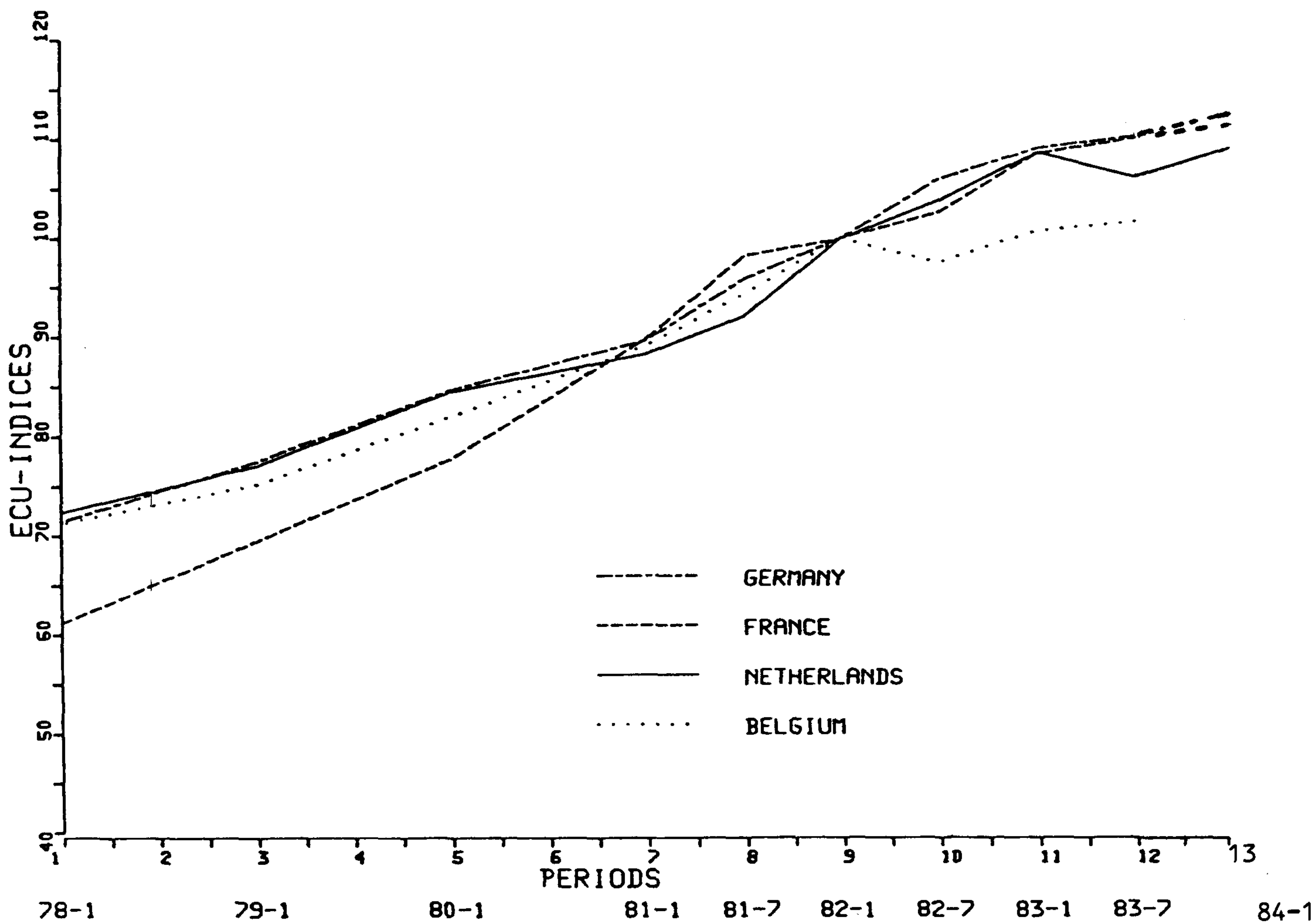
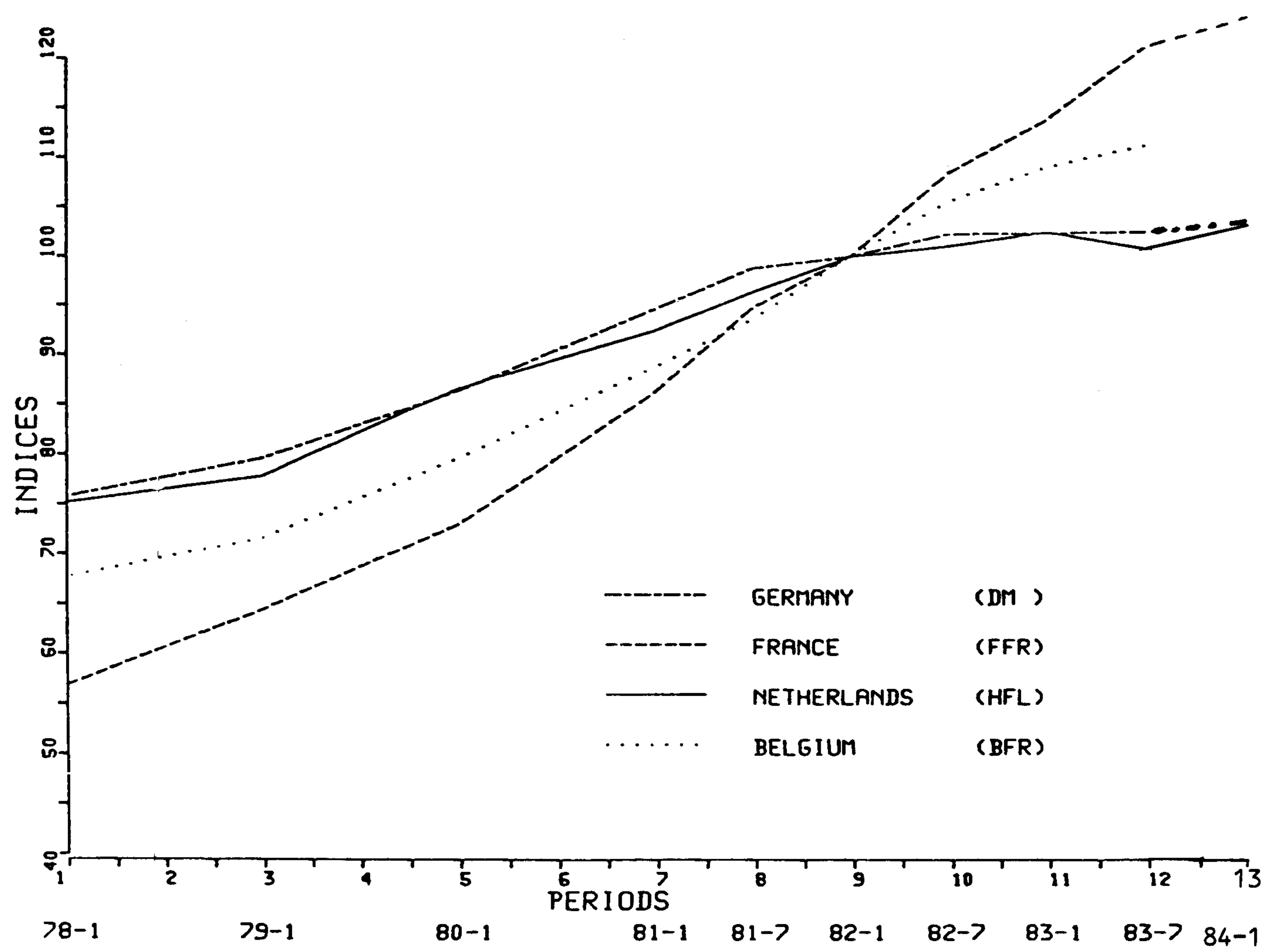


figure 2.5.

TOTAL COSTS IN NATIONAL CURRENCY



2.3. Price Surveys

2.3.1. Coverage

Price surveys are now being carried out in Germany, France, Italy, the Netherlands, Greece, Belgium/Luxembourg. The analysis relates to movements between these Member States up to the third quarter of 1983. For the first time Greek data are available but not yet analysed.

2.3.2. Methodology

The base point for the price indices results has been chosen as the first quarter of 1982; this facilitates the analysis as certain series either started or changed methodology late 1981 or beginning of 1982. In the calculations, the weighting factors used are tonne-kilometres relating to 1980.
Care must be taken in comparing the French results before the end of 1981, because of the change of series.

2.3.3. Overall results by nationality of haulier

Average prices (measured in national currencies) for Dutch hauliers rose by 0.92%. For the German hauliers, the average prices rose very slightly. Compared to the first quarter 1983, price average rose by 1.24% for French hauliers and by 1.53% for Italian hauliers.

2.3.4. Price developments by relation

Figure 2.7. shows the development of the average prices (in ECU) of German, French, Dutch and Belgium/Luxembourg hauliers on the relations between these Member States while Figure 2.8. shows similar average prices of Italian hauliers and partner country.

German hauliers

Average prices (in ECU) in the relation with Italy show a decrease of 0.4%. In the other relations the increase was about 1% since the second quarter of 1983.

In national currency there was a small increase of 0.7%.

French hauliers

In ECU, average prices, compared with the first quarter of 1983, decreased for all the relations. We notice a small decrease in relation with Germany 0.2% but a more important decrease for Belgium/Luxembourg 2.6%, Italy 3.94% and the Netherlands 4.7%.

Overall, average prices in ECU show a decrease of 2.46%. In national currency, average prices have increased by 1.24%.

Italian hauliers

Compared to the first quarter of 1983, we notice in ECU an important increase in relation with the Netherlands (6.72%) and Belgium/Luxembourg (5.39%). We notice an increase of 3.4% in relation with Germany and a decrease of 3.21% with France.

Overall, average prices in ECU show an increase of 2.3%. In national currency, average prices have increased by 4.47%.

Dutch hauliers

Average prices (in ECU) in relation with Italy increased by 4%, while there was small increase with Germany 1.1% and with France 1.6%. Data for the relation with Belgium/Luxembourg have not yet been received.

Overall, average prices in ECU increased by 1%. In national currency, average prices increased by 0.92%.

Belgium/Luxembourg hauliers

Average prices in ECU are not yet available in relation with France and the Netherlands. In relation with Germany and Italy, average prices in ECU decreased respectively by 1.88% and 3.11%.

Overall, average prices are not available.

Figure 2.6: EFFECTS OF CHANGES IN EXCHANGE RATES

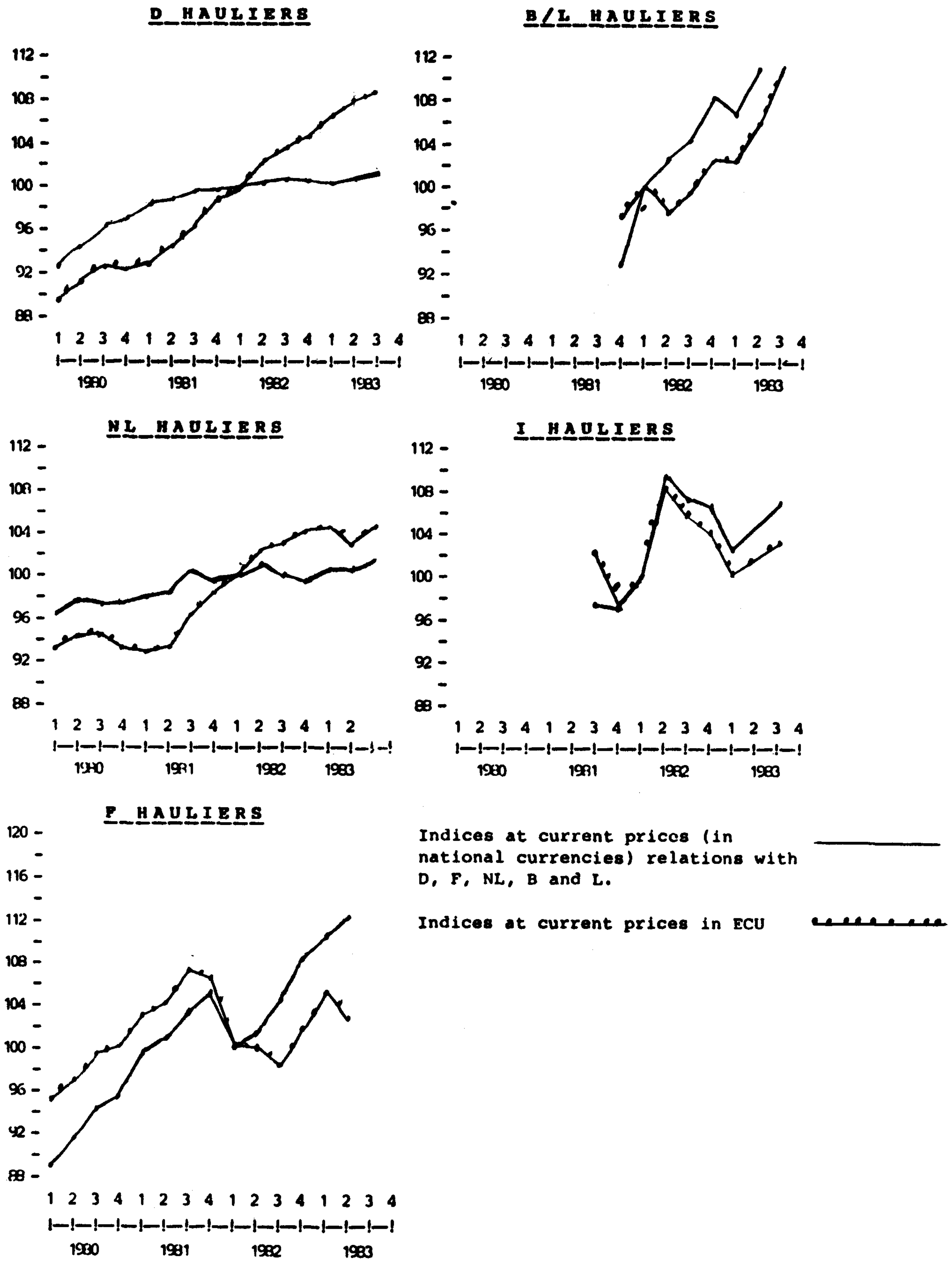


Figure 2.7: PRICE DEVELOPMENT IN RELATIONS BETWEEN D, F, NL, B(L)

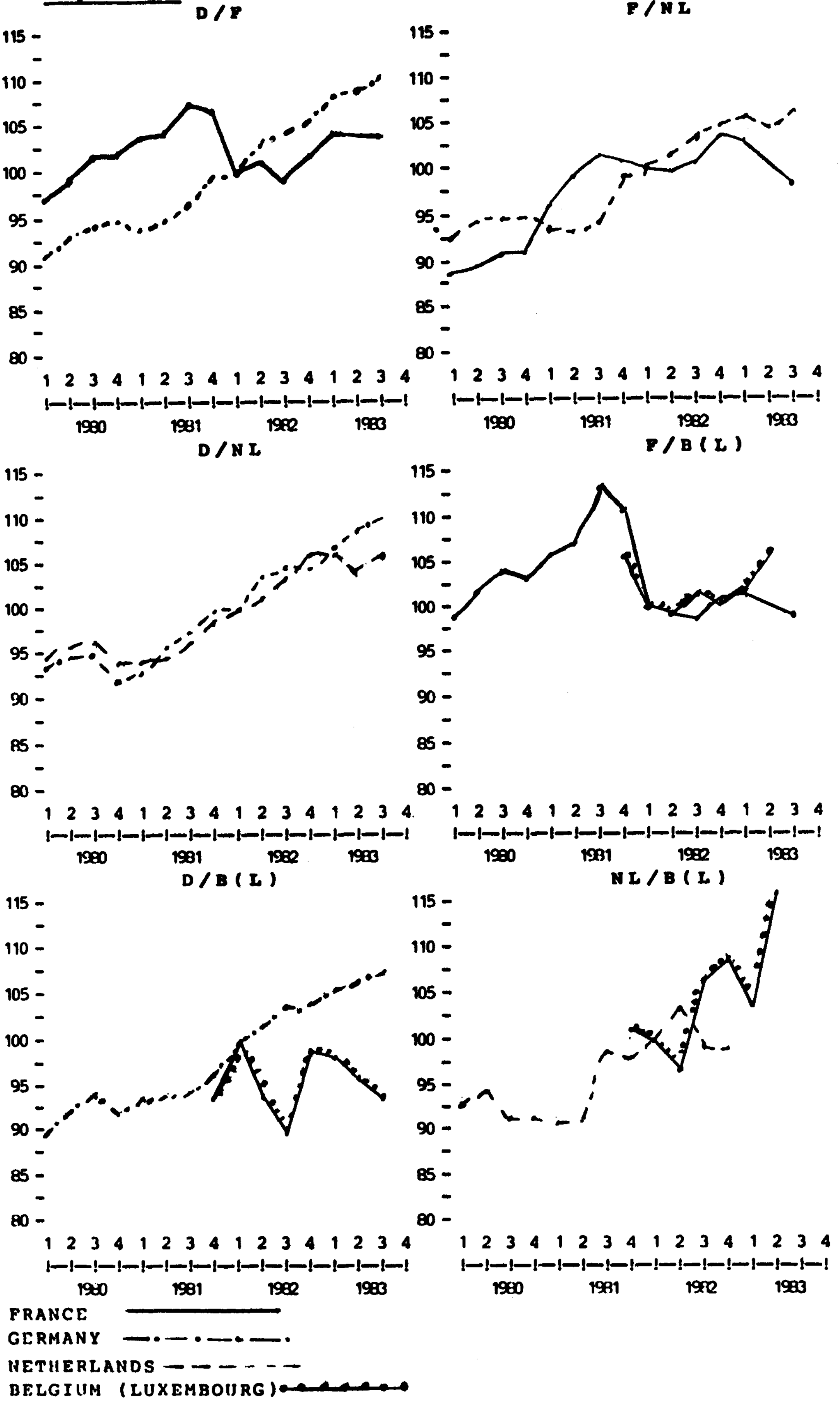
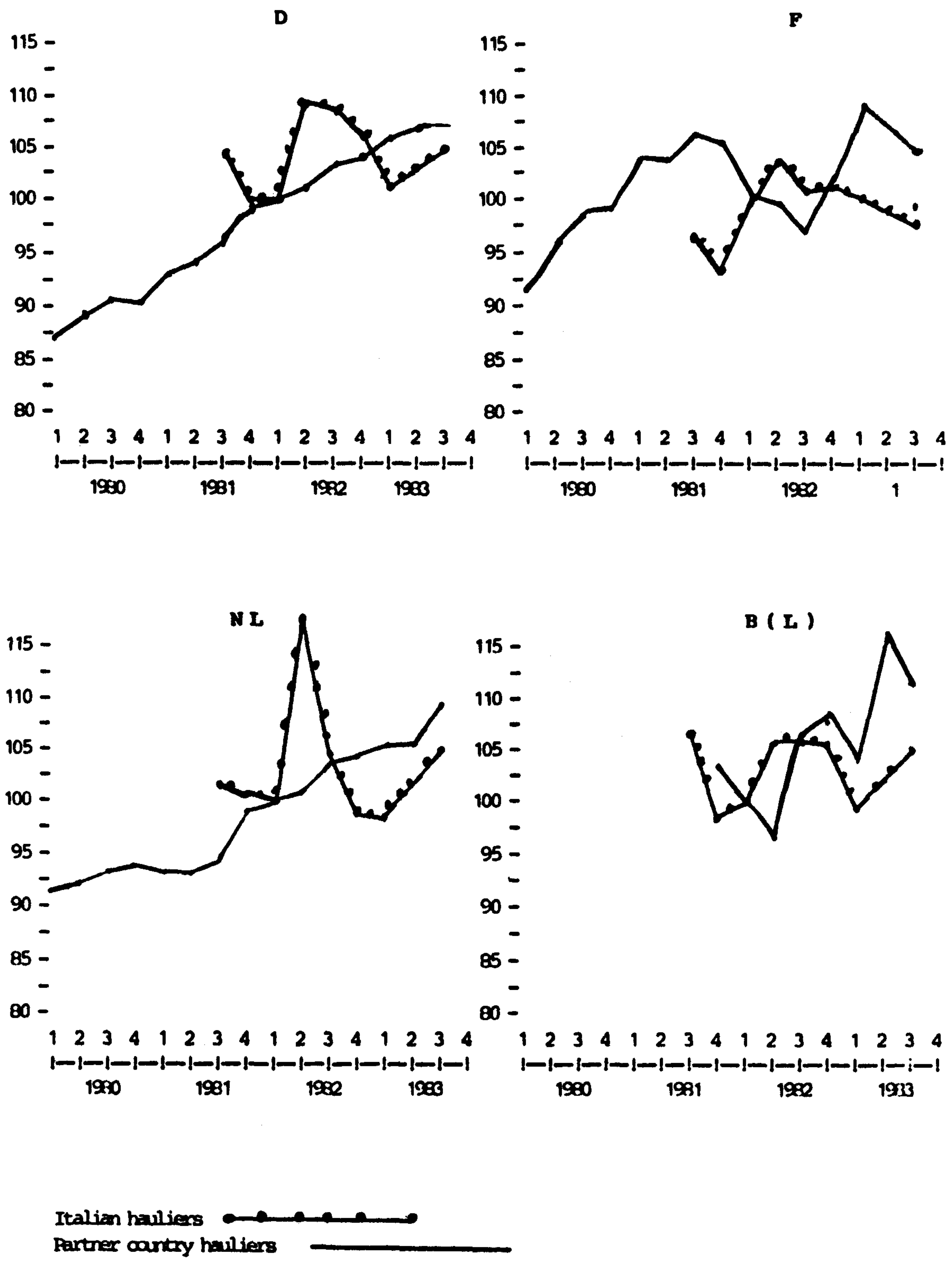


Figure 2.8: PRICE DEVELOPMENT IN RELATIONS WITH ITALY



SECTION 3

WATERWAY SURVEYS

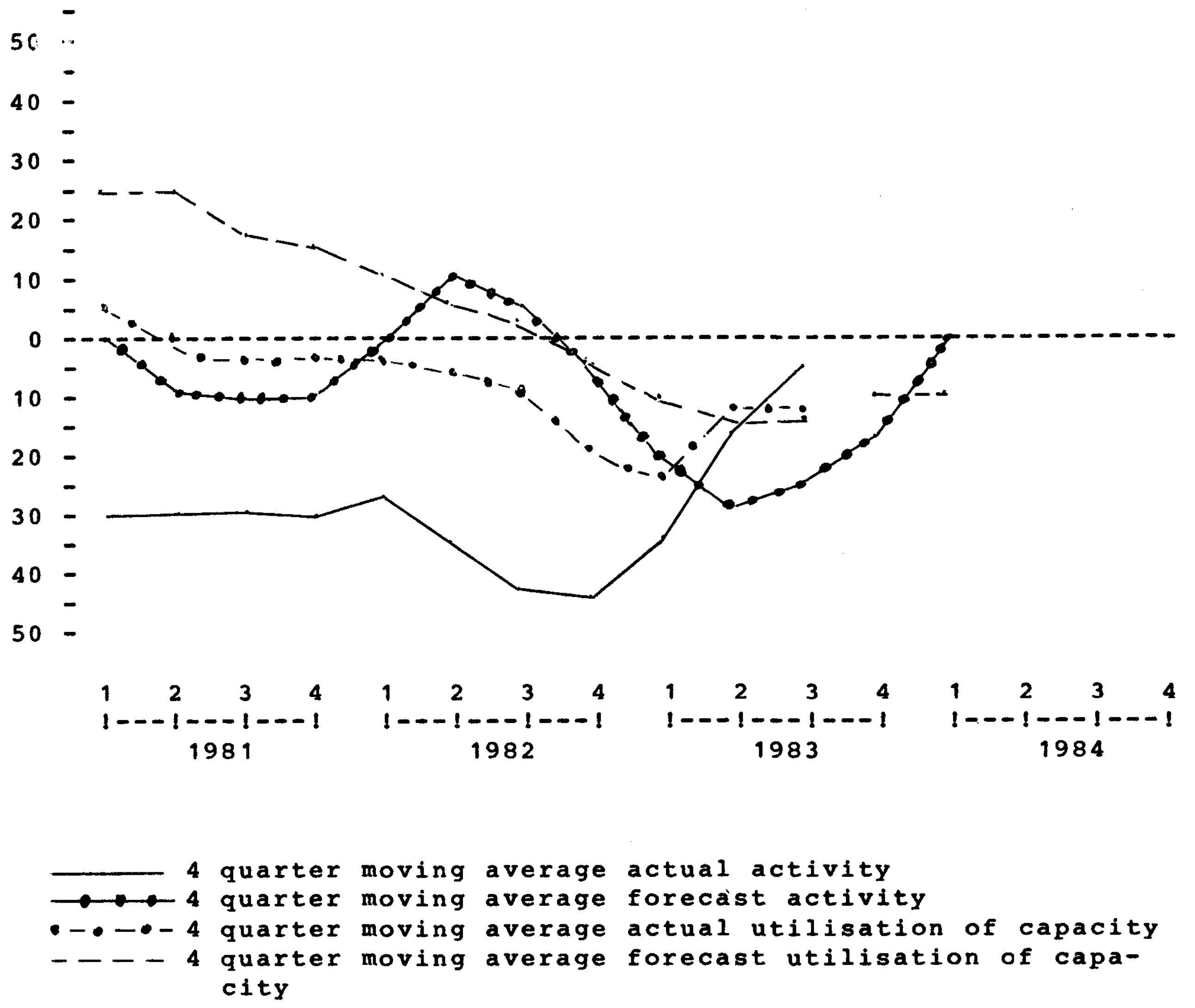
3.1. Rhine traffic

3.1.1. Activity

In the opinion of shippers surveyed, the level of activity for the third quarter 1983 is much better than that of the third quarter 1982. Consequently, the moving average (calculated on the balance of opinion for the last four quarters) shows an increase in comparison with the previous quarter (figure 3.1.).

Figure 3.1. : Rhine : Indicators of activity and Utilisation of Capacity (moving averages)

Aggregate balance of opinions (in percentate)



The upward tendency in the level of activity since the fourth quarter 1982 carried on in the third quarter 1983, but the level of activity is still felt to be unsatisfactory.

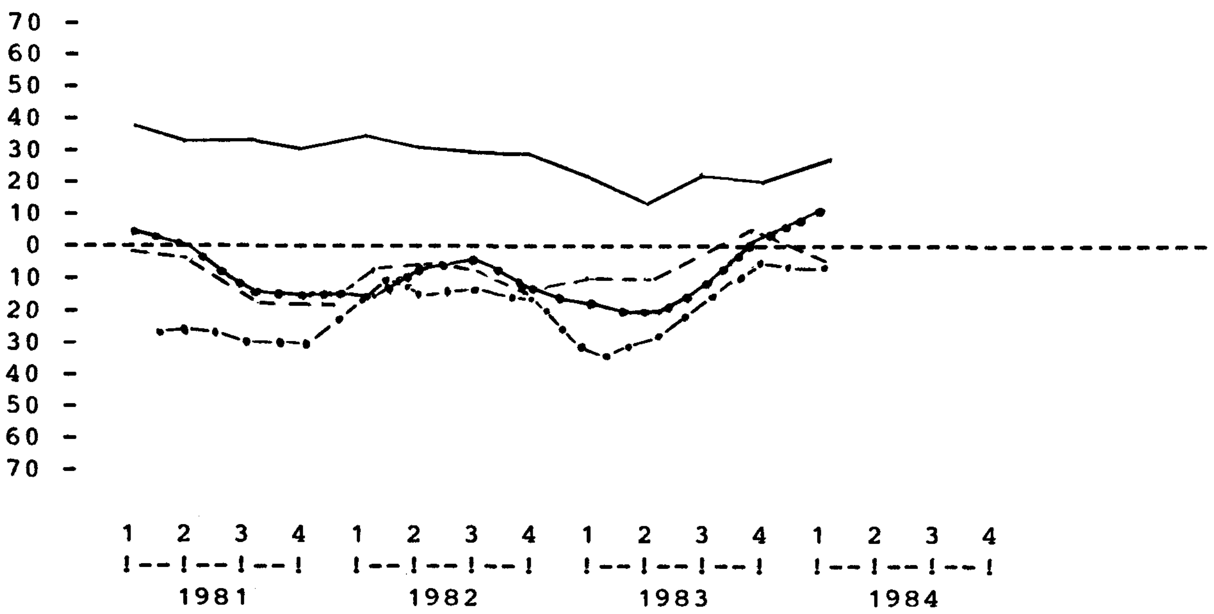
This slightly positive trend is confirmed by statistical evidence concerning France and Belgium. Rhine traffic to and from Belgium went up by 0.8% and 3.3% respectively, while French outgoing traffic increased by 7.6% and ingoing traffic by 17.3%. On the other hand, traffic from the Netherlands to Germany is still depressed. Consequently, overcapacity still exists.

3.1.2. Forecasts

The expected upturn in the level of activity in the third and fourth quarter of 1983 is expected to continue in the first quarter of 1984 (see figure 3.1., moving average forecast). The activity indicates a continued, but slow recovery.

Utilisation of total capacity on the Rhine for the first quarter of 1984 is expected to be stable at a low level. Due to the low water level on the Rhine in the fourth quarter, the overcapacity did in fact dissapear, but the utilization of capacity stayed at a low level.

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



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 3.2.) show that, in the opinion of the shippers questioned, the upward trend of the third and fourth quarter 1983 is continuing in the first quarter of 1984 for coal and oil. For sand and gravel and transport of ore, shippers seem to be more pessimistic than they were for the fourth quarter 1983.

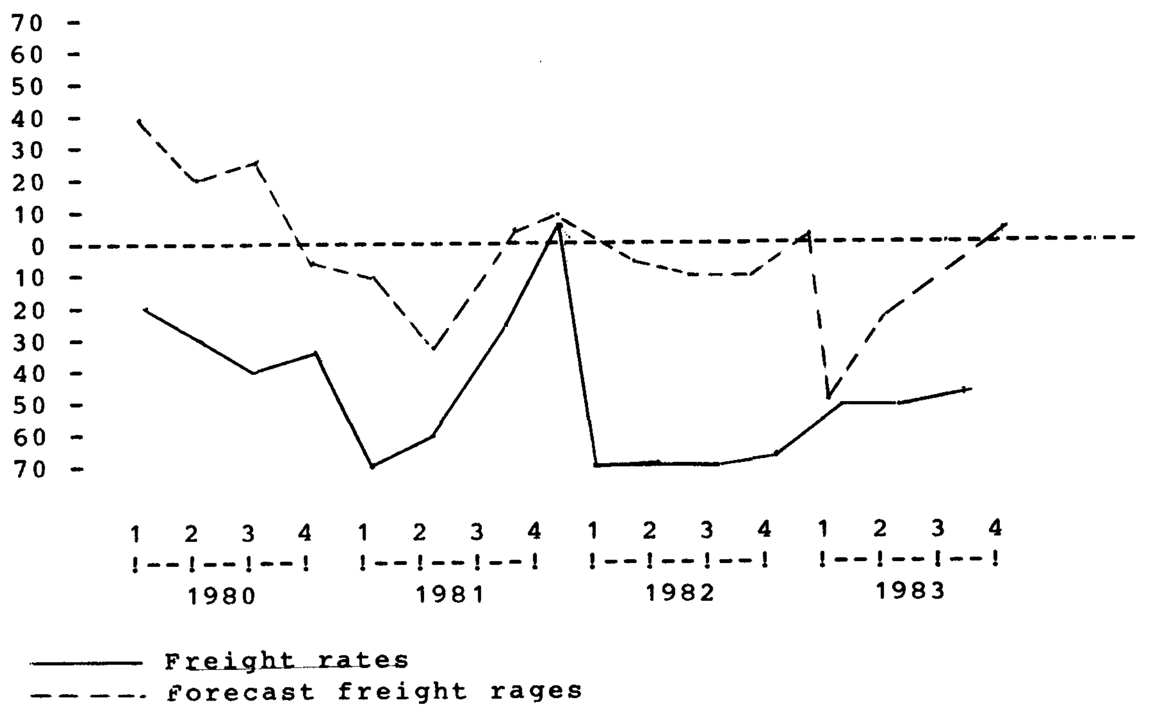
3.1.3. Freight rates

After a slight increase in rates in the fourth quarter 1982 and the first quarter 1983, shippers feel that the upward trend continued in the third quarter 1983, where rates were higher than in the same quarter of 1982 but still considered highly unsatisfactory.

The expected slow recovery of freight rates which started in the second quarter 1983 is continuing in the first quarter 1984. In spite of the optimistic forecasts and the low water level during the fourth quarter 1983, the full employment of the Rhine-fleet has not brought high freight rates, according to the specialised press.

Figure 3.3. : Rhine : developments in freight rates

Aggregate balance of opinions (in percentage)



3.2. North-South traffic

3.2.1. The results for the fourth quarter 1983 on the North-South were influenced by the low waterlevels on the Rhine. The capacity available on the market decreased, following the need for more vessels on the Rhine.

Next to that, the normal seasonal upturn could be noted and on transport to and from France through North-South links, an increase in tonnes transported compared to the same quarter last year emerged.

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

1982				1983			
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
-57	-28	-67	-43	-58	-45	-49	-3

Although no survey is carried out in France, the statistical data availalable indicate that transport activity through Norht-South links, measured in tonnes, increased by 4.3% for French exports, and 9.4% for imports compared with the same quarter of last year.

Nevertheless, 1983 was a bad year for North-South transports to and from France : -3.7% on French exports and -1.8% on French imports.

The positive picture on the fourth quarter is confirmed by the change in the balance of opinions in quarter 4 compared with quarter 3 as is shown in the following table.

Table 3.1. : Changes in activity assessment (difference in respective balance of opinion) by Dutch and Belgian shippers, Q4 over Q3 by bilateral relation.

From/To	B	F	NL
B	-6	+28	+25
F	+21		+27
NL	+33	+23	+29

The only exception is a more negative assessment on Belgian domestic transport during the fourth quarter by Belgian transporters. According to French statistics, on French domestic traffic a 2.7% decrease was noted.

The positive assessment is also confirmed by the opinions on activity by tonnage class, as shown in the following table.

Table 3.2.: Changes in activity assessment by Dutch and Belgian shippers Q4 over Q3 by tonnage class.

Tonnage class	Belgian shippers	Dutch shippers	Total
200-450	+37	+27	+28
451-750	0	+58	+49
751-1150	0	+27	+26
1151-1550	+11	+83	+63
1551	+8	+76	+41

3.2.2. Waiting Time

In addition to these surveys the number of waiting days at the "bourse" is an important indicator of the development of activity in relation to capacity available. Table 4.3. and the subsequent figures illustrate the important seasonal and trend changes in this indicator.

Table 3.3. Quarterly average of waiting days in international North-South traffic.

Country of origin	Year	Q1	Q2	Q3	Q4
B*	1981	7.0	6.0	8.0	4.5
	1982	5.2	7.5	8.5	7.5
	1983	8.2	8.8	8.5	7.5
F	1981	8.5	7.0	15.3	14
	1982	9.2	18.0	16.1	12.5
	1983	20.9	17.0	21.0	16.2
NL	1981	8.3	4.4	5.6	3
	1982	6.5	6.2	9.8	7.1
	1983	6.9	6.9	8.5	4.9

*Domestic traffic included

The average number of waiting days during the fourth quarter compared with the third quarter went down in Belgium, France and the Netherlands which could be explained by the seasonal influences, and the low waterlevel on the Rhine. These influences were felt in particular in the Netherlands, and to a lesser extent in Belgium.

The following figure shows the development of waiting time on the various bilateral relations during the fourth quarter 1983 in comparison with the fourth quarter 1982.

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

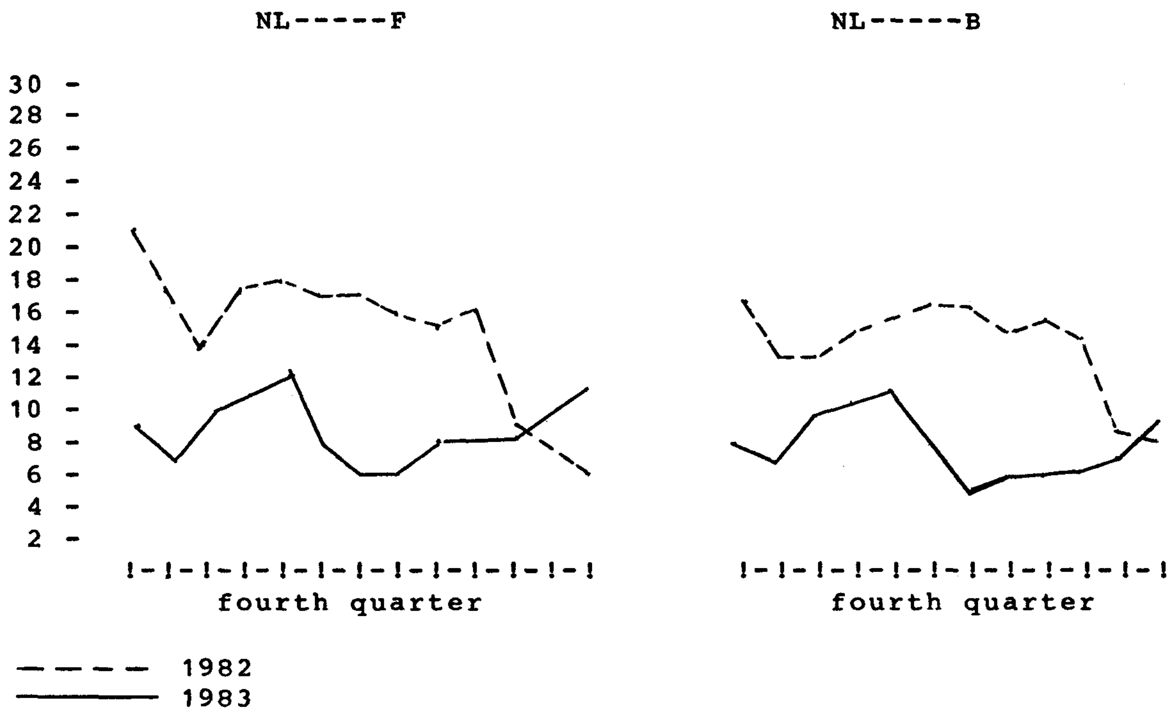


Figure 3.5.: Weekly average of waiting days in North-South traffic, from Belgium to France, including Belgian domestic traffic, and from Belgium to The Netherlands (bourse of Antwerp).

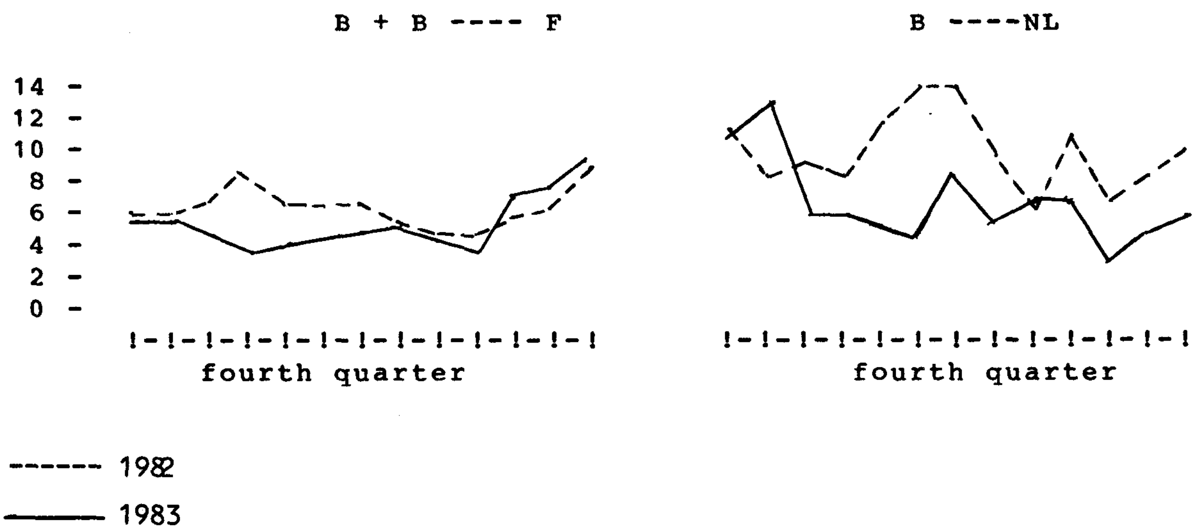
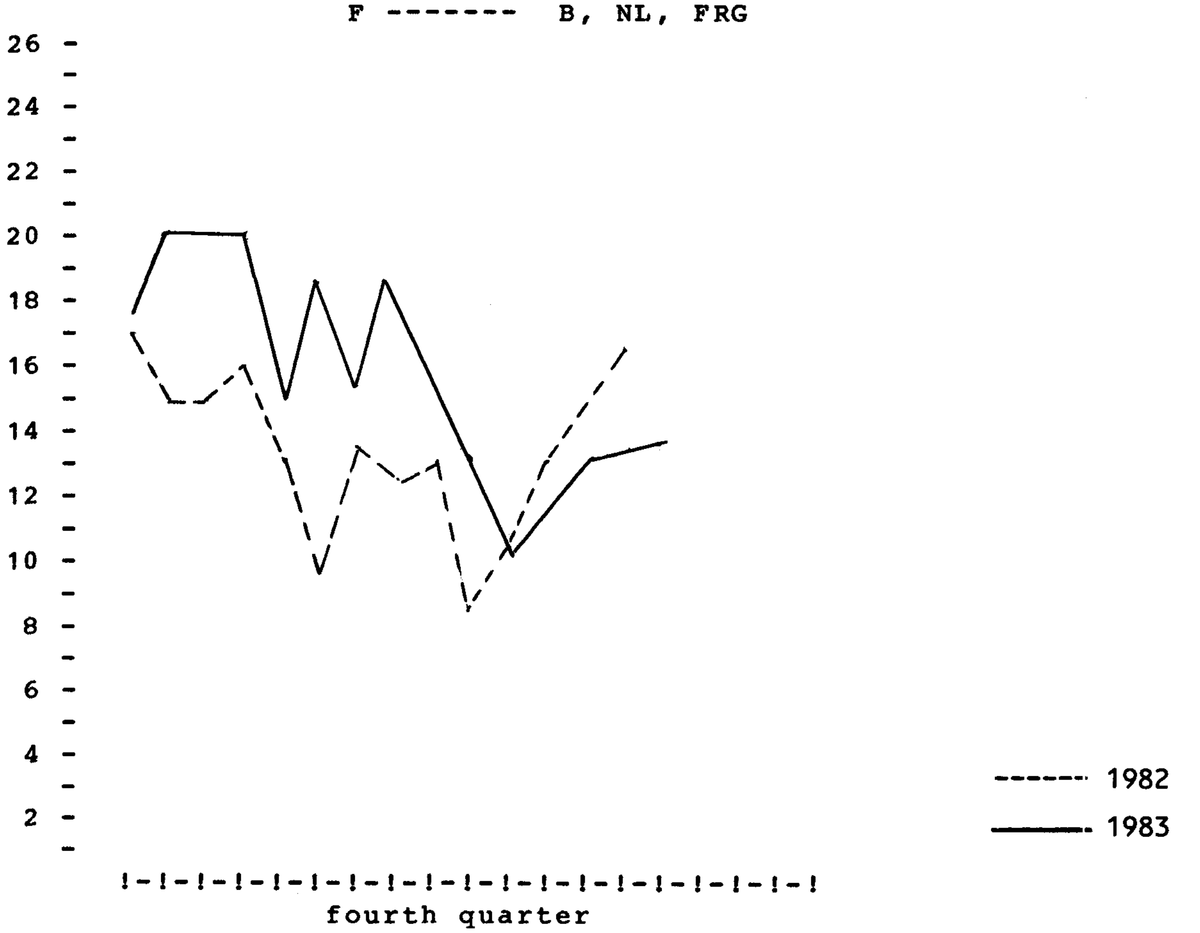


Figure 3.6. Weekly average of waiting days in North-South traffic from France.



The general picture from these figures is the following:

- On all international relations the number of waiting days was lower during the fourth quarter 1983 than during the same period of 1982, with the exception of relations from France;

- As far as France is concerned, it could be noted that the improvement of French outgoing traffic (+42.136 tonnes) was clearly offset by the decrease of demand for inland waterway transport services on the domestic market (-297.755 tonnes).

3.2.3. Prices

More than 60% of the Dutch and Belgian shippers were of the opinion that freight rates were stable during the fourth quarter compared to the previous quarter. The balance of opinion of Dutch transporters changed to positive, indicating an average freight level higher than the previous quarter, for the first time since the first quarter 1982. However, the balance of opinion of Belgian shippers was negative again after a positive outcome during the third quarter. The negative assessment on the Belgian domestic market could be related to this opinion.

3.2.4. Forecasts : Again pessimistic.

Forecasts by inland waterway transporters of the demand for transport services for the first quarter 1984 are pessimistic. Clearly the structural overcapacity still exists, but on balance the views are less pessimistic than during the first quarter 1983.

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

Country/Quarter	1982				1983				1984
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
B	-10	-23	-33	-40	-64	-52	-49	+32	-50
NL	-15	-8	-48	-6	-31	-24	-18	+21	-20
Total	-13	-13	-43	-17	-42	-33	-28	+28	-32

Consequently, waterway transporters in Belgium and the Netherlands expect also negative developments on freight rates compared with the previous quarter as is shown in the following table.

Country/Quarter	1982			1983				1984
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
B	-10	-8	0	0	-6	-6	+21	-3
NL	-12	-8	0	-10	-12	-13	+35	-35
Total	-13	-43	-17	-42	-33	-28	+28	-32

SECTION 4

RAIL SURVEYS

4.1. Railway Price Indices

4.1.1. Coverage

Price surveys are now being carried out in Germany, France, Italy and Belgium. The four railways agreed on the method of a "basket" of representative commodities defined for each directed relation from actual traffic data for the reference period (1981).
SNCF have applied the method on the France-Germany, France-Italy, France-Belgium and latest in France-Netherlands links. DB and FS on Germany-France and Italy-France respectively.
NS will join the experiment from the beginning of 1984.

4.1.2. Price developments by relation

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

France-Italy

31.12.81	30.9.82	31.12.82	31.3.82	30.6.83	30.9.83	31.12.83
100	110.38	118.12	124.22	131.51	132.26	134.12

In the fourth quarter of 1983 the evolution of price indices on the French sector show an average increase of 21-25% since 31.12.81 (except rail-road 31%). Compared to the third quarter of 1983 there was a change in the tariffs of almost all the representative commodities. Thus the figures show an increase of 3%. On the Italian sector the price index increased to 59-60% since 31.12.81 (except sand 68%) and there was no change from the previous quarter.

France-Germany

31.12.81	30.9.82	31.12.82	31.3.83	30.6.83	30.9.83	31.12.83
100	108.98	108.98	113.75	113.84	114.13	115.71

Except for maize and cars (tariff 9674) in the German sector, there was no change in the tariffs since the second quarter of 1983. Thus the price indices continue to show an increase of 5-8% since 31.12.81. Compared to the third quarter of 1983 in the French sector there was a change of 3% in the tariffs of almost all the representative commodities. Thus the increase is 25% since 31.12.81 (except maize 18% and cars tariff 9674 15%).

France-Belgium

31.12.81	30.9.82	31.12.82	31.3.83	30.6.83	30.9.83	31.12.83
100	106.10	114.29	115.33	115.33	117.71	125.21

For the 9 representative commodities of this relation, the evolution of price indices varies considerably for both carriers. For SNCF it is between 23-25% and for SNCB it is between 20 and 33% (since the 31.12.81).
Except for wheat and cereals in both sectors the tariffs are changed in this quarter showing an increase of 7-12% from the third quarter of 1983.

France Netherlands

31.12.81	30.9.82	31.12.82	31.3.83	30.6.83	30.9.83	31.12.83
100	108.32	111.67	111.67	113.56	119.90	121.64

For five of the seven representative commodities in the Netherlands sector the price index has been below the base established on 31.12.81 (8% during the third quarter of 1982 and about 5% during the second quarter of 1983). In the fourth quarter of 1983 figures for these commodities show an average decrease of 1-2% since 31.12.81.
In the fourth quarter of 1983 tariffs of the French sector show an average increase of 17% since 31.12.81 (except Maize 35%).

Italy-France

31.12.81	30.9.82	31.12.82	31.3.83	30.6.83	30.9.83	31.12.83
100	112.19	115.31	120.77	127.33	127.33	

Analysis of results for the fourth quarter will be incorporated in the following report.

Germany-France

31.12.81	30.9.82	31.12.82	31.3.83	30.6.83	30.9.83	31.12.83
100	108.06	108.06	113.65	113.98	113.98	115.68

There was no change in the tariffs for both sectors during the third quarter of 1983.
Compared the fourth to the third quarter of 1983 there was a change of 4% in the tariffs for the French sector, thus the increase for this sector rose by 26% since 31.12.81.

Belgium-Netherlands

31.12.81	31.9.82	31.12.82	31.3.83	31.6.83	31.9.83	31.12.83
100	108.67	108.67	113.93	113.93	116.29	116.29

Except for containers the evolution of price indices was the same for the two sectors. Thus in the fourth quarter of 1983 the price index has been 15-16% above the base established on 31.12.81 for the two sectors.

SECTION 5

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.

5.1. Container traffic

Results for the last quarter of 1983 show a continuing favourable trend for border crossing European rail container traffic. Traffic for Intercontainer in TEU was 10% and in TEU/km 12% above the last quarter of 1982. The positive trend meant that the total traffic in the last quarter reached a new record level. The gross results for both maritime and continental traffic were good. 1983 was a record year for continental traffic which reached 265,000 TEU. The 4th quarter was exceptionally strong with 77,500 TEU. The principal traffic flows were between Italy and the Federal Republic of Germany, France and Italy, Belgium and Italy, Germany and Spain and Belgium and Sweden. The container pool which Intercontainer manages at the moment in five countries is also generating new traffic. Competitive conditions in continental traffic remain severe. Average revenues per TEU/km in UIC francs have increased by between 4 and 5% since the first half of 1983 following the general rate revision on 1st July 1983. Trading conditiions on some routes have led to falling trucking prices with corresponding losses in market shares for rail container services. But there are now more signs of a general increase of trading volume trhoughout Europe.

Maritime traffic has been encouraged by the better trading conditions on some overseas trade routes. In the fourth quarter 112,000 TEU were carried, 10% more than the year before. The growth of exports to the USA has increased demand. There has been an increasing tendency to concentrate US West-bound cargoes for shipment in Netherlands, Belgian and French Atlantic ports, especially from Italy.

Competition between rail and coastal feeder shipping for containers continues to be very fierce with feeders profiting from the currently low bunker prices.

Traffic between Great Britain and the European Continent has been declining or stagnating for some time, but traffic for Italy increased by 19% in 1983.

Traffic to and from the USSR continues at a high level following the growth cargo via the Trans-siberian route.

5.2. Piggy-back transport

The information given is the number of units despatched by the "organising company", i.e. the number of semi-trailers, swap bodies or road trains carried by rail wagons.
Analysis of results for TRW will be incorporated in the following report.
The third quarter of 1983, compared to the second quarter of 1983, shows a marked decrease in the overall growth rate.

5.2.1. International traffic by companies based in the Community

Country of despatch		Units despatched	% change from	
		Q3/83	Q2/83	Q3/82
Kombiverkehr	D	12805	-9	19
Novatrans	F	3148	29	4
	I(except D)	2178	-24	-22
	UK	1333	47	-15
FERPAC	I (to D)	2132	-9	5
Trailstar	NL	1134	-29	7
Total		22730	-6	7

While there were some exceptions in different companies, figures were little more pessimistic in the third quarter of 1983 than those in the second quarter of 1983.

Kombiverkehr in this quarter achieved a 56% share of the market but she has suffered serious losses on almost all relations with an overall decline of 9% from the previous quarter. In this company since 1.1.83 border crossing traffics SP/F were considered in the D --- SP relation, and the total number of units despatched for this relation is 2118 (-17% from Q2/83). Novatrans, trading in France and in the United Kingdom in total traffic has a considerable increase of 29% and 47% respectively but trading in Italy results show serious losses.

In the previous quarter, Ferpac had the most positive figures, but in the third quarter of 1983 results show a decline of 9%.

5.2.2. Important intra-Community relations (over 900 units in Q3/83)

Relation	Units despatched Q3/83	% change from Q2/83	Q3/82
D ------ I	5595	-10	23
F ------ I	2257	60	44
I ------ F	931	-45	6
I ------ UK	1247	6	-34
I ------ D	2132	-9	5
H ------ I	906	-30	10
Total	13068		

Annex

ORGANISATIONS UNDERTAKING SURVEYS

(a) **Road Opinion Survey**

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

(b) **Road Cost Survey**

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

(c) **Road Price Survey**

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

(d) **Inland Waterway Opinion Survey**

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

(e) Inland Waterway Cost Survey

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

(f) Rail Price Indices

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

(g) Combined Transport

Intercontainer (container transport)
Interunit (piggyback transport)

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