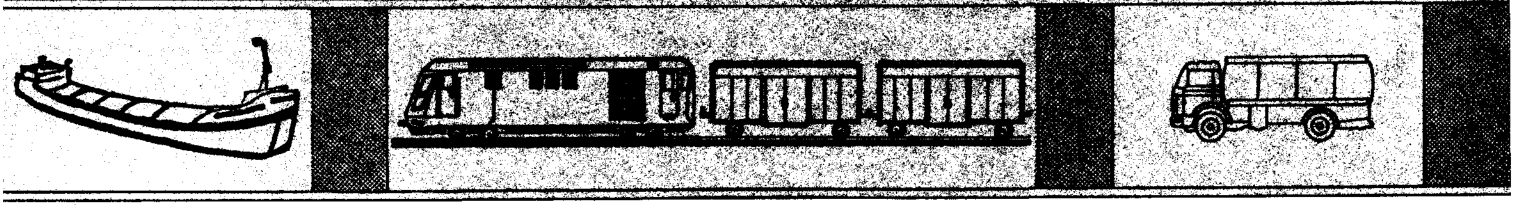
EUROPEAN COMMUNITIES

EUROPA TRANSPORT



OBSERVATION OF THE TRANSPORT MARKETS

MARKET DEVELOPMENTS

13

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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 (Q1 84) and combined transport (Q1 84 or Q2 84)
- the results of quarterly opinion surveys carried out among international road hauliers (Q2 84)
- the results of six-monthly cost surveys carried out among international road hauliers (1.7.84)
- the results of quarterly price surveys carried out among international road hauliers (Q1 84)
- the results of quarterly opinion surveys among inland waterway operators on two international networks, i.e. the Rhine (Q1 84) and the North/South (Q2 84) (North/South being inland waterway flows between the Netherlands, Belgium and France, but excluding traffic via the Rhine)
- the results of quarterly price indices for international rail movements (Q2 84).

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

* Readers should please note that the figures in this report, especially in Section 1, are now on an EUR-10 basis and not EUR-7 as in previous reports.

SUMMARY

	ITEM	EVOLUTION		CHAPTER
3 MODES	EUR-10 tot. tonnage	↗	+ 9.3 % Q1 84/Q1 83	table 1.1
ROAD	EUR-10 tonnage	↗	+ 4.7 % Q1 84/Q1 83	table 1.1
	Modal share	↘	- 1.8 % Q1 84/Q1 83	" 1.2
	Costs nat. currency	→	+ 0%(UK) -0.6%(NL)	chap.2.2.3
		↗	+ 4.1%(DK) +4.6%(F)	" 2.2.3
	Prices nat. curr.	↗	Max.= + 11.7 % (I)	chap.2.3.3
		↘	= - 2.3 % (B)	" 2.3.3
	EUR-10 traf. matrix		Q1 84/Q1 83 by relat.	table 2.0
INLAND WATER-WAYS	EUR-5 tonnage	↗	+10.0 % Q1 84/Q1 83	table 1.1
	Modal share	↗	+ 0.4 % Q1 84/Q1 83	" 1.2
RAIL	EUR-10 tonnage	↗	+20.0 % Q1 84/Q1 83	table 1.1
	Modal share	↗	+ 1.4 % Q1 84/Q1 83	" 1.2
	EUR-10 traf. matrix		Q1 84/Q1 83 by relat.	" 4.1

N.B. : Q1 84/Q1 83 represents the evolution of the first quarter of 1984 compared to the first quarter of 1983.

SECTION 1

GENERAL MARKET ASSESSMENT - ALL MODES

Road - Rail - Inland Waterways

First quarter 1984

The total tonnage for all three modes in the first quarter 1984 (Q1 84) was up 9.3 % on the same quarter of the previous year (Q1 83).

Table 1.1. : International EUR-10 traffic in million tonnes(1)

Mode	Mio Tonnes Q1 84	Mio Tonnes Q1 83	% change Q1 84/Q1 83
Road	42.2	40.3	+ 4.7
Rail	16.9	14.1	+ 20.0
I.W.	46.2	42.0	+ 10.0
Total EUR-10	105.3	96.4	+ 9.3%

Following the trend established in the fourth quarter 1983, all three modes registered a significant improvement in the first quarter of 1984 compared to the same quarter of the previous year.

Particularly noticeable is the marked recovery of Rail transport, which has recorded the best result for tonnage moved in a quarter since the second quarter of 1981.
Inland Waterways continued to follow the positive trend initiated in the second quarter of 1983 while Road transport was still improving, but at a lower rate. The reduced rate of increase for Road transport is due, at least partially, to the difficulties on the Italian frontiers.
This can be illustrated by the change in modal split (table 1.2) where Road lost 1.8% market share, mainly to the profit of Rail whose share recovered its level of Q1 82.

Table 1.2. : Modal split

Mode	Mio Tonnes Q1 84	Modal Split in % Q1 84	Q1 83	Evolution Q1 84/Q1 83
Road	42.2	40.1	41.9	- 1.8 %
Rail	16.9	16.0	14.6	+ 1.4 %
I.W.	46.2	43.9	43.5	+ 0.4 %
Total EUR-10	105.3	100 %	100 %	-

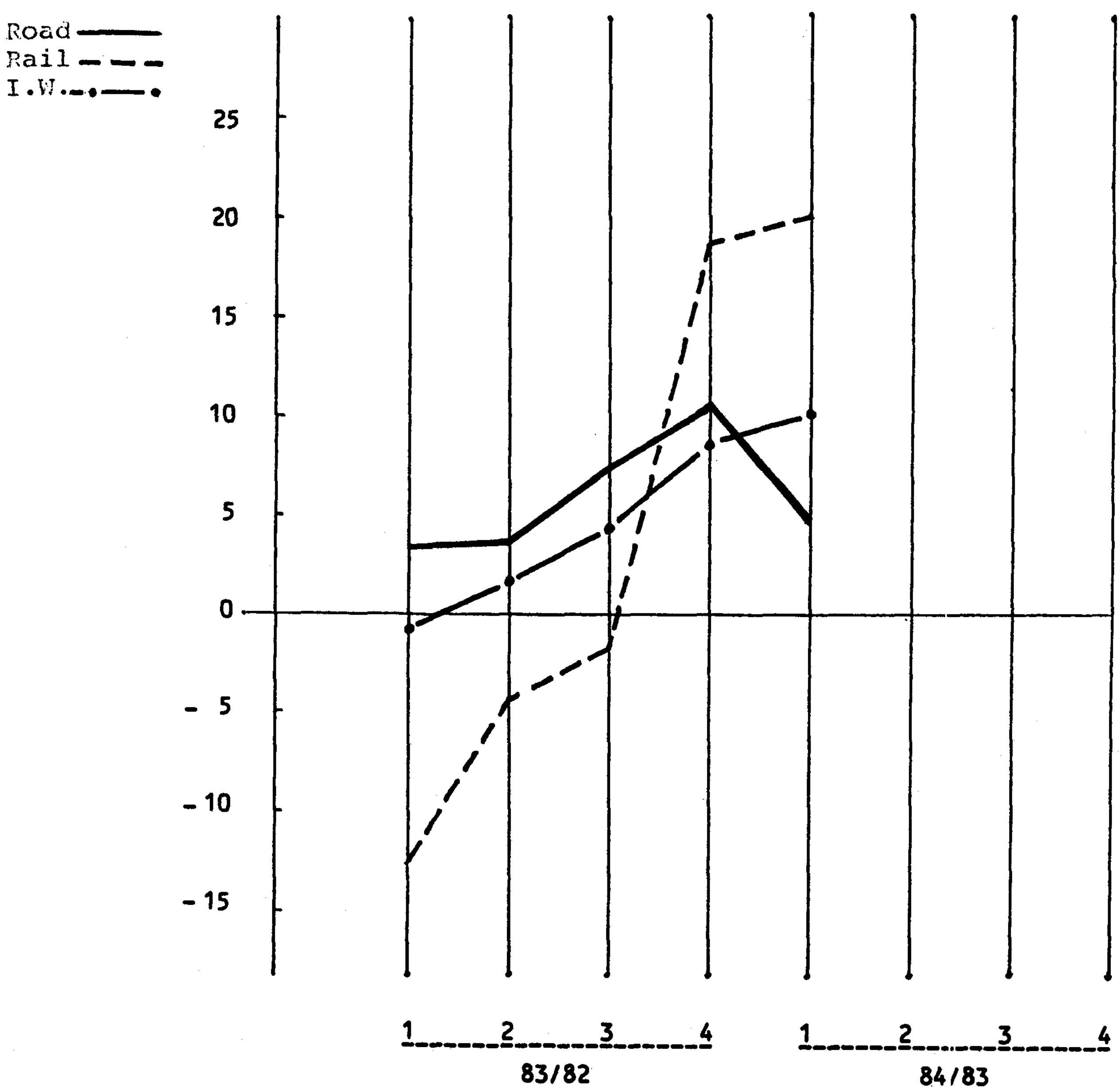
(1) Because of the strong seasonality of traffic, its evolution is monitored by comparing the results of a quarter with the corresponding quarter of the previous year.

Table 1.3.: Traffic Evolution by mode
(% difference between one quarter and the corresponding quarter of the previous year).

Mode	Q1 83/82	Q2 83/82	Q3 83/82	Q4 83/82	Q1 84/83
Road	+ 3.3	+ 3.5	+ 7.2	+ 10.4	+ 4.7
Rail	- 12.8	- 4.6	- 2.0	+ 18.7 R	+ 20.0
I.W.	- 0.7	+ 1.6	+ 4.2	+ 8.4	+ 10.0
3 Modes	- 1.1	+ 1.5	+ 4.6	+ 10.7	+ 9.3

R = revised.

Figure 1.1. : Graphic representation of growth rates by mode.



SECTION 2

ROAD

Table 2.0.: EUR-10 tonnage evolution (in percentage) Q1 84/Q1 83 by transport relation.

To / From	D	F	I	NL	B+L	UK	IRL	DK	GR	EUR 10
D	x	+5	+1	+11	+13	+20	+31	+2	+25	+8.5
F	+5	x	+7	+16	+4	+21	-41	+11	N.C.	+6.8
I	+3	-24	x	+12	-11	N.A.	N.A.	+12	+44	-9.5
NL	+3	+3	+4	x	+4	N.A.	N.A.	+19	+1	+3.6
B+L	+8	-2	+4	+12	x	+18	-11	+12	+2	+5.2
UK	+32	+5	N.A.	N.A.	+6	x	N.A.	-4	+40	+11.1
IRL	+63	+208	N.A.	N.A.	N.A.	N.A.	x	-40	N.C.	+81.8
DK	-13	-17	-7	+4	+15	+6	+22	x	-24	-8.6
GR	+5	+20	+80	+61	+27	+41	N.C.	N.C.	x	+22.6
EUR 10	+4.2	-2.8	+4.2	+11.8	+6.3	+18.4	-12.5	+5.9	+14.5	+4.7

N.A.=not available N.C.=no change

Road traffic evolution Q1 84/Q1 83

The increase of the EUR-10 road traffic (average = + 4.7%) was affected by the big drop of traffic from Italy to France (it is difficult to assess the impact of the lorry drivers' dispute in February) and by the drop of the traffic from Belgium/Luxembourg to France.

Outgoing traffic from Denmark was also down compared to Q1 83; this was possibly caused by a general fall in exports since rail figures were affected in the same way (see Chapter 4.1.).

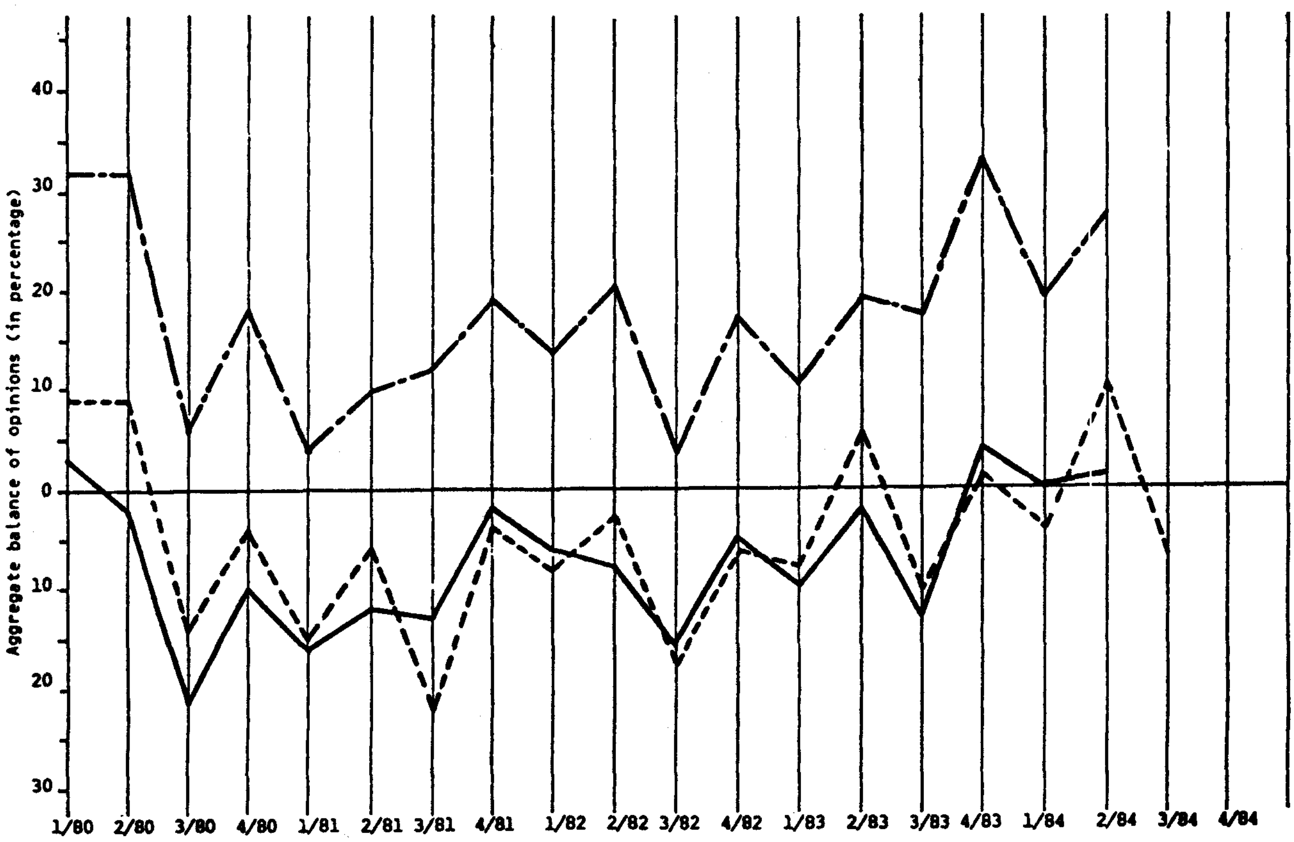
2.1. Road Inquiry Survey

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

Road Transport: slight improvement in second quarter

The inquiry for the second quarter of 1984 indicates a small improvement in comparison with the first quarter of 1984. Also, compared to the corresponding quarter of the previous year it appears that there has been an upswing in activity. This indicates that the upswing was not due to seasonal factors.
As far as the forecast for the third quarter of 1984 is concerned, compared with the third quarter of 1983, the balance of opinion is 6 percent points higher.

Figure 2.1: Activity indicator = global balance of opinion (in percentage)



Utilisation of rolling stock
Activity forecast
Activity

2.1.2. Activity

The activity level in the second quarter of 1984 has improved by 1 percentage point (balance of opinion). Compared to the second quarter of 1983 activity is 3 percentage points higher.

2.1.3. Forecasts

The expectations for the third quarter of 1984 show an decrease of 8 percentage points compared to the second quarter but an improvement of 6 percentage points if compared to the corresponding quarter of the year before.

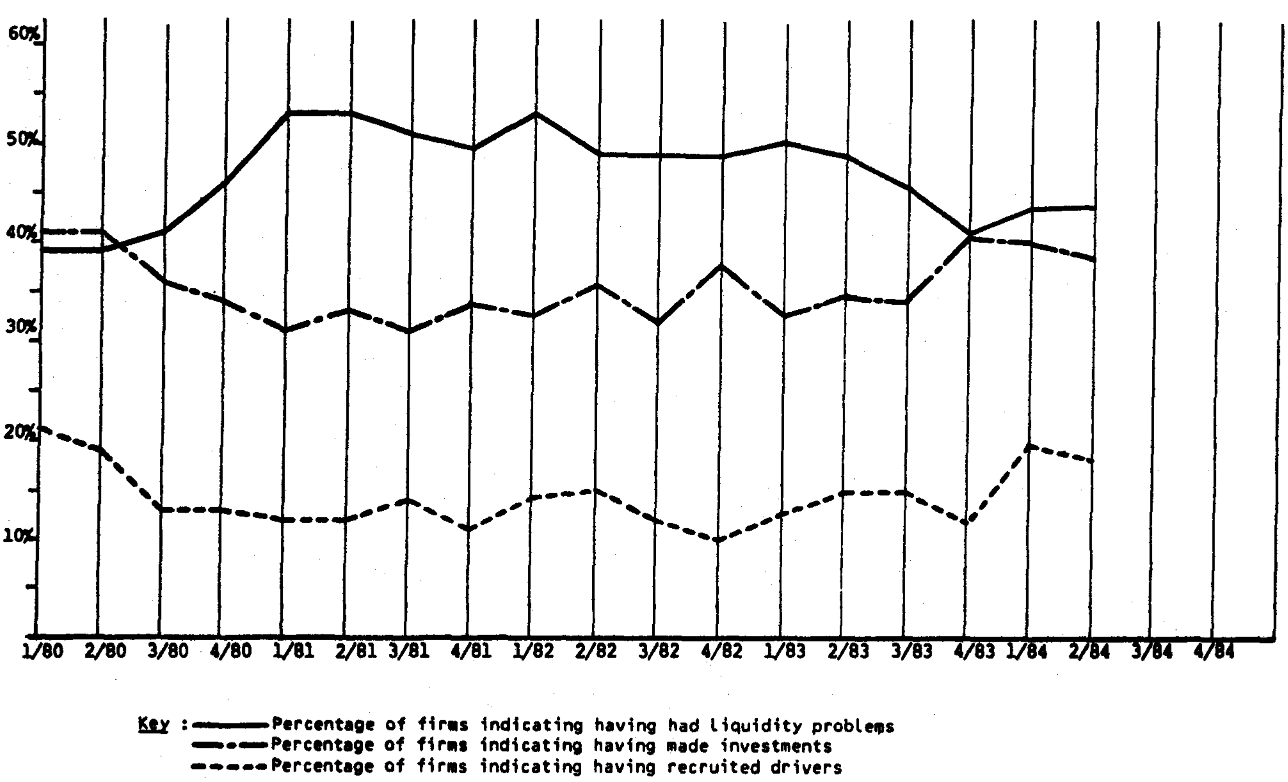
2.1.4. Utilisation of rolling stock

Compared to the previous quarter the use of rolling stock (balance of opinions) has increased (8 percentage points). In comparison to the corresponding quarter of the previous year the same increase appears.

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

It appears that no big changes are taking place in either direction. As investment tends to stabilize at a somewhat higher level than during previous years, one could conclude that hauliers remain moderately confident about the future.

Figure 2.2: Economic indicators



2.1.6. Recruitment

The number of firms having recruited drivers has decreased by 2 percentage points in comparison to the previous quarter, but it is 3 percentage points higher than during the corresponding quarter of the previous year.

2.1.7. Cash-flow problems.

The percentage of firms facing cash-flow problems remains stable at 43%; this is 6% less than during the second quarter of 1983.
Although there is some improvement, cash-flow problems remain very serious in Italy (decrease from 72% to 66%).

2.1.8. Investment

At 38% the number of hauliers having invested is slightly under the level of the previous quarter (2 percentage points lower), but still 3 percentage points above the level of the second quarter of 1983.

Tab. 2.1.
ECT-0311

ROAD TRANSPORT SURVEY

INTERNATIONAL TRANSPORT ACTIVITY

2. QUARTER 1984
FORECAST : 3. 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	22	20	8	
	=	46	54	48	49	49	55	44	44	48	45	48	53	56	54	72	
	-	34	28	33	31	29	26	38	33	29	31	31	24	22	26	20	
	S	-14	-10	-14	-11	-7	-7	-20	-10	-6	-7	-10	-1		-6	-12	
FRANCE	+	16	14	16	21	18	15	14	15	14	15	11	17	18	18	11	
	=	41	47	47	47	47	49	50	43	43	49	47	51	53	55	64	
	-	43	39	37	32	35	36	36	42	43	36	42	32	29	27	25	
	S	-27	-25	-21	-11	-17	-21	-22	-27	-29	-21	-31	-15	-11	-9	-14	
ITALIA	+	15	15	17	18	15	16	14	15	14	15	17	23	16	19	28	
	=	41	44	42	53	49	47	41	51	45	54	47	49	53	48	45	
	-	44	41	41	29	36	37	45	34	41	31	36	28	31	33	27	
	S	-29	-26	-24	-11	-21	-21	-31	-19	-27	-16	-19	-5	-15	-14	1	
NEDERLAND	+	30	20	25	26	34	32	26	31	31	37	26	40	31	34	6	
	=	41	65	49	52	43	45	41	50	44	44	38	42	49	48	64	
	-	29	15	26	22	23	23	33	19	25	19	36	18	20	18	30	
	S	1	5	-1	4	11	9	-7	12	6	18	-10	22	11	16	-24	
BELGIQUE-BELGIE	+	25	28	22	31	28	31	23	30	27	28	21	35	30	31	16	
	=	46	41	43	44	48	51	43	47	46	51	44	47	47	55	61	
	-	29	31	35	25	24	18	34	23	27	21	35	18	23	14	23	
	S	-4	-3	-13	6	4	13	-11	7		7	-14	17	7	17	-7	
LUXEMBOURG	+	25	27	12	26	28	26	21	25	21	35	26	21	33	29	13	
	=	46	49	51	61	48	50	51	47	52	49	52	61	44	47	67	
	-	29	24	37	13	24	24	28	28	27	16	22	18	23	24	20	
	S	-4	3	-25	13	4	2	-7	-3	-6	19	4	3	10	5	-7	
UNITED KINGDOM	+	23	21	24	28	28	25	21	24	23	24	20	26	21	24	21	
	=	49	53	56	59	59	56	63	64	61	63	63	66	66	65	71	
	-	28	26	20	13	13	19	16	12	16	13	17	8	13	11	8	
	S	-5	-5	4	15	15	6	5	12	7	11	3	18	8	13	13	
IRELAND	+	18	24	21	25	21	27	20	28	21	23	23	21	13	16	20	
	=	30	47	39	40	48	39	38	37	47	50	60	60	68	67	76	
	-	52	29	40	35	31	34	42	35	32	27	17	19	19	17	4	
	S	-34	-5	-19	-10	-10	-7	-22	-7	-11	-4	6	2	-6	-1	16	
DANMARK	+	24	20	21	24	25	26	17	27	26	19	19	29	21	24	15	
	=	57	65	61	61	65	64	61	62	66	65	64	64	62	65	71	
	-	19	15	18	15	10	10	22	11	8	16	17	7	17	11	14	
	S	5	5	3	9	15	16	-5	16	18	3	2	22	4	13	1	
HELLAS	+				27	16	14	17	28	19	32	24	29	27	23	23	
	=				47	45	31	34	36	39	39	43	43	45	49	44	
	-				26	39	55	49	36	42	29	33	28	28	28	33	
	S				1	-23	-41	-32	-8	-23	3	-9	1	-1	-5	-10	
E.E.C.	+	20	19	20	24	22	21	19	23	21	24	19	26	23	23	14	
	=	44	50	47	50	50	50	46	49	48	50	49	52	54	55	65	
	-	36	31	33	26	28	29	35	28	31	26	32	22	23	22	21	
	S	-16	-12	-13	-2	-6	-8	-16	-5	-10	-2	-13	4		1	-7	

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

Tab. 2.2.

ECT-0321

ROAD TRANSPORT SURVEY

2. QUARTER 1984

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	34	35		
	=	50	53	52	47	49	51	51	54	51	51	51	50	50	48		
	-	24	19	27	24	18	21	29	27	22	18	22	17	16	17		
FRANCE	+	36	37	44	46	29	42	27	30	22	29	27	30	23	24		
	=	20	27	25	25	35	24	40	41	41	37	43	44	45	50		
	-	44	36	31	29	36	34	33	29	37	34	30	26	32	26		
ITALIA	+	14	14	18	17	15	14	17	12	11	14	22	36	21	18		
	=	48	55	59	62	64	62	52	64	54	69	57	49	44	56		
	-	38	31	23	21	21	24	31	24	35	17	21	15	35	26		
NEDERLAND	+	49	46	47	53	51	60	38	41	42	63	51	69	65	80		
	=	32	42	36	37	37	35	40	45	46	30	40	30	27	19		
	-	19	12	17	10	12	5	22	14	12	7	9	1	8	1		
BELGIQUE-BELGIE	+	28	33	31	41	41	56	39	45	48	57	54	57	60	59		
	=	48	46	51	45	43	34	42	41	40	33	37	36	33	34		
	-	24	21	18	14	16	10	19	14	12	10	9	7	7	7		
LUXEMBOURG	+	29	37	29	28	19	21	14	37	38	39	38	42	48	46		
	=	57	56	57	65	74	68	72	50	53	58	49	55	48	54		
	-	14	7	14	7	7	11	14	13	9	3	13	3	4			
UNITED KINGDOM	+	42	45	48	68	65	62	58	69	60	69	61	69	66	68		
	=	33	34	36	25	26	22	23	24	30	20	27	24	16	28		
	-	25	21	16	7	9	16	19	7	10	11	12	7	18	4		
IRELAND	+	28	30	31	36	34	30	30	46	37	49	43	86	41	35		
	=	40	40	38	36	37	40	47	41	39	30	41	8	21	42		
	-	32	30	31	28	29	30	23	13	24	21	16	6	38	23		
DANMARK	+	42	39	41	46	49	47	43	54	55	44	46	57	44	52		
	=	45	47	47	40	43	47	44	41	37	43	43	39	47	43		
	-	13	14	12	14	8	6	13	5	8	13	11	4	9	5		
HELLAS	+				23	17	14	8	27	17	15	25	35	32	31		
	=				56	54	29	31	39	41	50	41	49	36	51		
	-				21	29	57	61	34	42	35	34	16	32	18		
E.E.C.	+	33	33	34	39	35	41	30	36	34	38	37	46	39	42		
	=	39	43	44	41	44	39	44	45	43	43	44	41	41	43		
	-	28	24	22	20	21	20	26	19	23	19	19	13	20	15		

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

Tab. 2.3.
ECT-0331

ROAD TRANSPORT SURVEY

2. QUARTER 1984

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	9	8		
FRANCE	4	3	4	4	5	3	4	4	6	3	3	3	5	9		
ITALIA	22	29	28	22	21	24	18	16	17	25	19	20	15	19		
NEDERLAND	15	19	14	11	18	19	19	8	15	25	18	16	32	28		
BELGIQUE-BELGIE	17	18	19	10	21	26	19	15	18	22	21	15	23	28		
LUXEMBOURG	35	30	14	27	21	31	28	27	42	35	44	28	38	38		
UNITED KINGDOM	12	10	19	25	21	19	20	21	18	26	25	22	20	28		
IRELAND	24	12	12	24	17	15	10	19	21	15	27	24	26	20		
DANMARK	12	8	17	7	14	20	6	11	10	13	15	12	25	20		
HELLAS				40	36	24	25	20	29	28	25	19	22	22		
E.E.C.	12	12	14	11	14	15	12	10	13	15	15	12	20	18		

Tab. 2.4.
ECT-0341

ROAD TRANSPORT SURVEY

2. QUARTER 1984

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	18	23		
FRANCE	67	66	64	61	64	60	60	57	64	65	59	59	59	57		
ITALIA	65	72	70	70	72	76	69	70	76	76	68	63	72	66		
NEDERLAND	19	16	18	15	18	12	11	10	13	6	7	3	6	3		
BELGIQUE-BELGIE	27	39	28	32	32	27	26	31	27	26	21	21	21	14		
LUXEMBOURG	63	15	43	27	57	38	40	42	27	16	19	15	23	17		
UNITED KINGDOM	64	57	57	51	56	49	53	50	49	44	42	41	46	47		
IRELAND	79	59	53	51	58	58	50	59	59	55	42	43	40	45		
DANMARK	26	23	31	29	32	21	32	18	20	19	17	6	16	8		
HELLAS				63	54	76	79	69	72	68	76	67	60	57		
E.E.C.	53	53	51	50	53	49	49	49	50	49	46	41	43	43		

Tab. 2.5.

ROAD TRANSPORT SURVEY

ECT-0351 2. QUARTER 1984

PERCENTAGE OF FIRMS INDICATING HAVING MADE INVESTMENTS

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	42	42		
FRANCE	31	30	27	34	34	35	31	42	29	29	29	34	35	32		
ITALIA	26	29	26	27	26	25	21	20	18	24	25	34	24	33		
NEDERLAND	38	44	36	47	46	42	43	46	41	47	44	44	58	66		
BELGIQUE-BELGIE	30	36	30	29	30	39	32	38	42	40	42	46	41	42		
LUXEMBOURG	17	22	21	33	26	29	28	47	38	20	47	39	33	31		
UNITED KINGDOM	30	52	50	49	53	63	61	67	49	67	68	65	71	74		
IRELAND	28	27	30	29	25	22	27	19	31	24	44	46	55	36		
DANMARK	35	39	44	40	43	45	35	42	43	51	51	55	53	52		
HELLAS				46	33	42	24	29	42	34	34	37	42	22		
E.E.C.	31	33	31	34	33	36	32	38	33	35	35	41	40	38		

2.2. Cost Indices

2.2.1. Coverage

Cost indices surveys are conducted in six countries : 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 U.K. They cover the first half of 1984. The German, Dutch and Belgium/Luxembourg surveys give a breakdown of the cost factors by geographical relations.

For this report, no data have yet been received from Germany and Belgium/Luxembourg.

2.2.2. Methodology

Indices for fuel are shown separately (tables 2.6. and 2.7.; and figures 2.3. and 2.5.), 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 2.6.

2.2.3. Overall cost developments : First half of 1984

In national currency, total costs remained stable for the UK and decreased slightly (-0.6%) for the Netherlands. Significant increases were registered for Denmark (+4.1%) and for France (+4.6%).

In ECU, total costs remained stable for the Netherlands (-0.1%) and decreased by about -3.1% for the U.K. The increases registered in ECU were similar to those in national currency for Denmark (+4.0%) and for France (+4.8%).

2.2.4. Fuel cost developments : First half of 1984

In national currency, fuel costs increased significantly for France (+5.0%), Denmark (+4.6%) and the U.K. (+3.3%) while a drop of -8% was announced for the Netherlands.

In ECU, fuel costs increased by +5.1% for France and decreased marginally for the U.K. (-1.0%). Significant decreases were registered for Denmark (-4.4%) and for the Netherlands (-8.0%).

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	1.7.84
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	123.5
Netherland	(HFL)	57,0	77,0	86,2	94,4	100,0	99,0	99,4	91,9	97,8	89.8
B/L	(BFR)	47,7	66,9	78,9	90,0	100,0	102,2	105,4	106,7	114,5	–
U.K.	(UKL)	49,8	70,7	82,6	102,4	100,0	102,4	111,5	110,7	110,7	114.0
Denmark	(DKR)			78,1	95,8	100,0	100,0	118,0	108,2	106,6	111.2

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	1.7.84
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	111.7
Netherland	56,3	75,1	82,3	90,1	100,0	101,7	105,3	96,7	103,3	95.3
B/L	50,1	68,9	79,1	90,7	100,0	94,4	97,3	97,5	101,7	–
U.K.	41,5	62,7	87,4	105,0	100,0	104,8	103,3	108,8	109,3	108.3
Denmark			78,5	98,6	100,0	97,7	116,6	105,7	104,2	108.6

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	1.7.84
Germany	(DM)	79,6	86,3	94,6	98,8	100,0	102,3	102,4	102,5	103,5	–
France	(FF)	64,5	73,0	86,3	94,8	100,0	108,5	113,8	121,1	123,7	128.3
Netherland	(HFL)	77,9	86,6	92,5	96,4	100,0	101,1	102,5	100,8	103,0	102.4
B/L	(BFR)	71,6	79,6	88,8	93,6	100,0	105,6	109,0	111,2	115,6	–
U.K.	(UKL)	63,0	77,3	91,5	99,2	100,0	106,0	108,4	112,8	113,1	113.1
Denmark	(DKR)			88,3	95,1	100,0	102,5	111,6	110,3	110,7	114.8

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	1.7.84
Germany	77,5	84,7	89,6	95,8	100,0	105,9	109,0	110,2	112,2	–
France	69,5	77,8	89,8	98,2	100,0	102,6	108,5	110,0	111,3	116.1
Netherland	77,1	84,5	88,3	92,1	100,0	103,8	108,6	106,1	108,8	108.7
B/L	75,2	82,0	89,1	94,3	100,0	97,5	100,7	101,6	102,6	–
U.K.	72,2	79,4	92,1	100,2	100,0	103,6	107,1	110,3	110,6	107.5
Denmark			88,8	96,1	100,0	100,1	110,2	107,8	108,2	112.2

Figure 2.3.

FUEL COSTS IN ECU

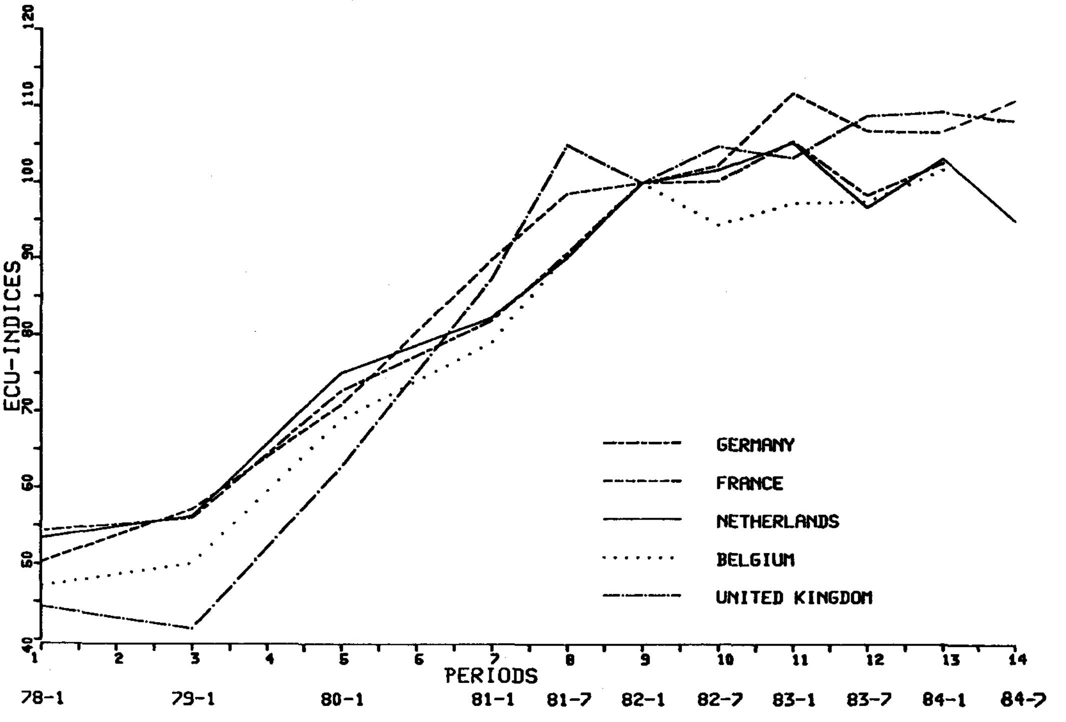


Figure 2.4.

TOTAL COSTS IN ECU

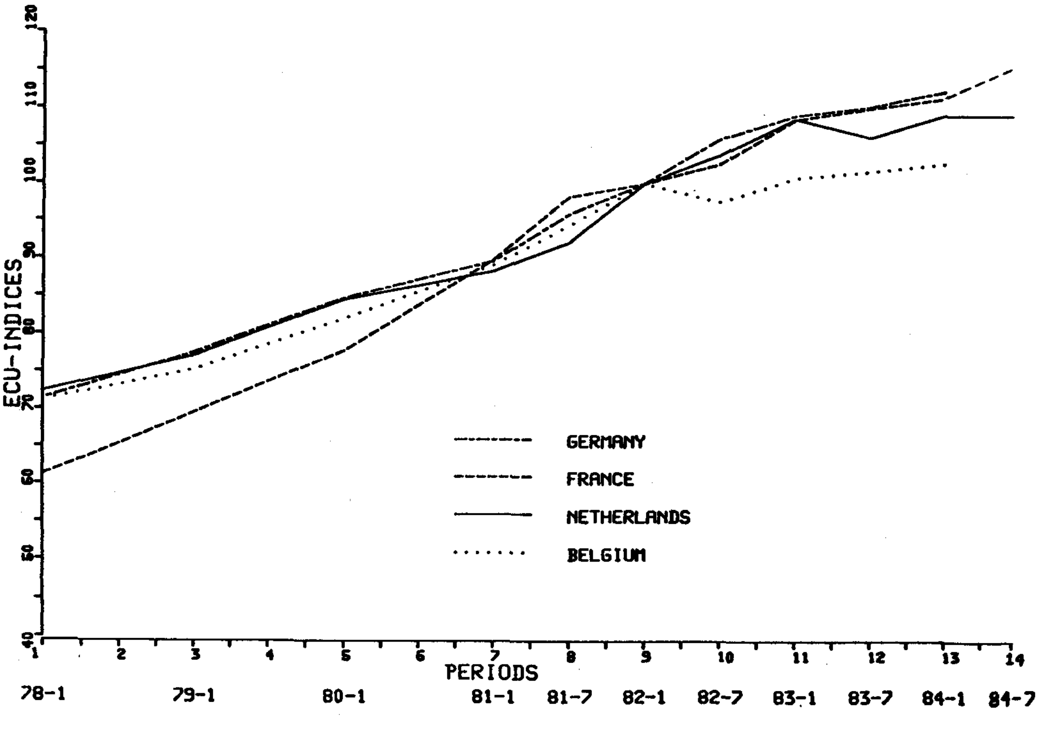


Figure 2.5.

FUEL COSTS IN NATIONAL CURRENCY

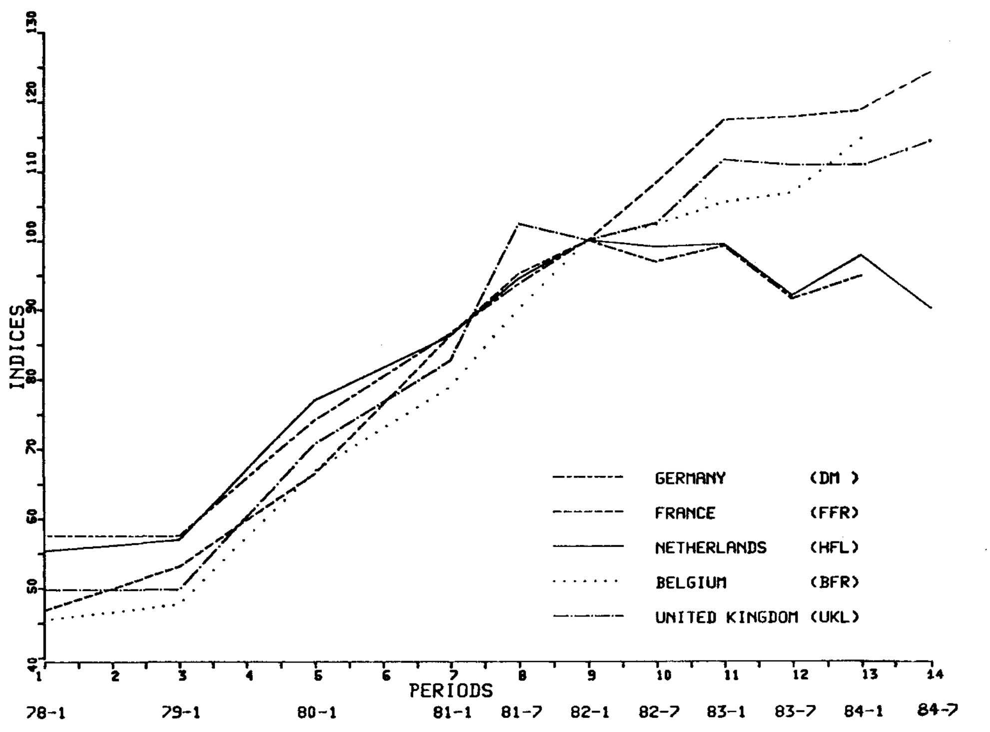
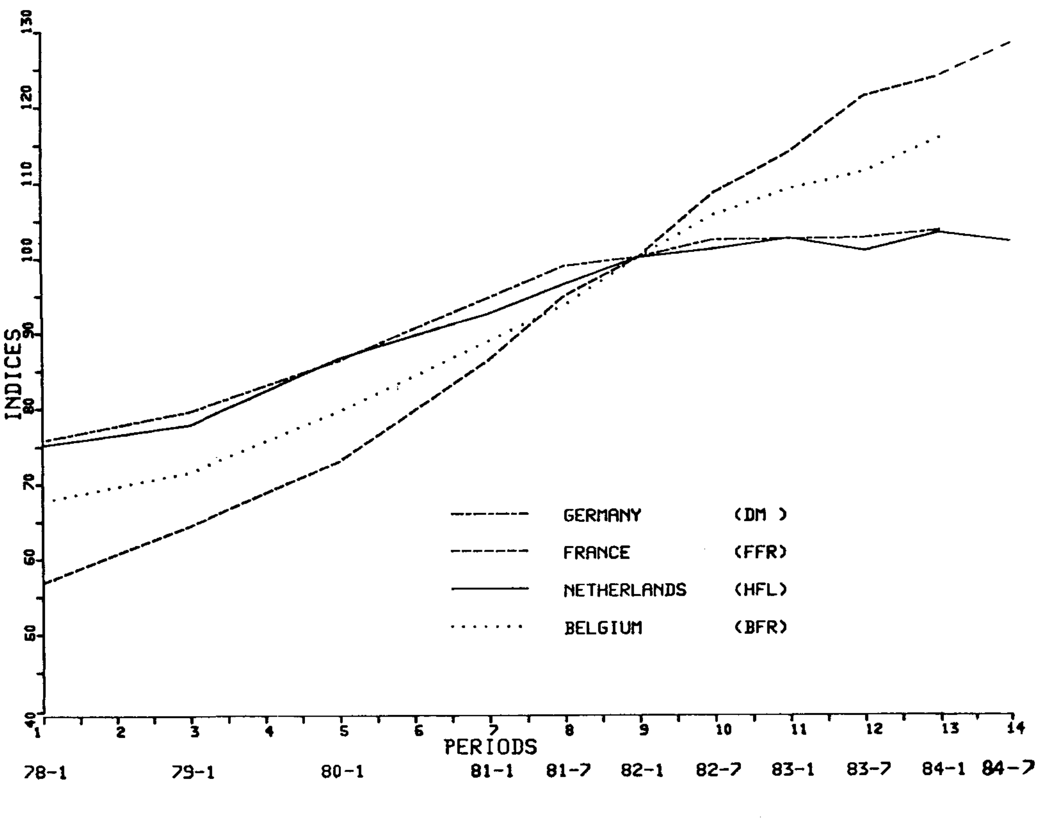


Figure 2.6.

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 first quarter of 1984.

2.3.2. Methodology

The base point for the price indices results has been chosen as the third quarter of 1983, which was the first quarter available for Greece. In the calculations, the weighting factors used are tonne-kilometres relating to 1980.

2.3.3. Overall results by nationality of haulier

Overall average prices (measured in national currencies) have increased for Italy (+ 11.7%).
Overall average prices in national currencies have decreased for Belgium/Luxembourg (- 2.3%).
In ECU, overall average prices decreased for Belgium/Luxembourg (- 2.2%) and Greece (- 3.6%).
Overall average prices for Italy increased about 10.7%.

2.3.4. Price developments by nationality of haulier

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 average prices of Italian hauliers and partner country.

German hauliers

In ECU, average prices have decreased only in relation with France (-0.4%). Small increases were noticed in relation with the other Member States. On all the relations, German hauliers have increased their prices less than the partner Member State, the Netherlands excepted.

French hauliers

In ECU, average prices decreased only in relation with the Netherlands (- 3.4%). In relation with the other Member States, average prices increased slightly. French hauliers have increased their prices less than the partner Member State in relation with Italy and the Netherlands.

Italian hauliers

In ECU, average prices increased very much in relation with all the Member States. In relation with Germany (14.8%) and France (7%), average prices have increased the most of all the relations of all Member States. The Italian hauliers have increased their prices more than the partner Member State on all the relations.

Dutch hauliers

In ECU, average prices have increased slightly in relation with all the Member States. Data for the relation with Belgium/Luxembourg have not yet been received.

Belgium/Luxembourg hauliers

In ECU, average prices have decreased significantly in relation with France (-10.8%) and less with Italy (-3.9%). Average prices have increased in relation with Germany (+ 5.7%) and relation with the Netherlands (+2.7%).
In relation with Belgium/Luxembourg, all the average prices of the other Member States have increased.

Greek hauliers

In ECU, average prices have increased only in relation with France (1.4%) and Belgium/Luxembourg (+6%). Average prices have decreased very much in relation with the Netherlands (-14.8%).

Table 2.10.

Comparison Q1 84 - Q4 83

Relation with / Nation. hauliers	IN ECU						WEIGHTED AVERAGES	
	D	F	I	NL	B/L	GR	In ECU	In nat. curr.
D	-	- 0.4	+ 1.6	+ 0.6	+ 1.1	N.A.	+ 0.6	N.C.
F	+ 1.5	-	+ 1.9	- 3.4	+ 0.9	N.A.	+ 0.9	+ 1.1
I	+14.8	+ 7.0	-	+ 5.9	+ 4.9	N.A.	+10.7	+11.7
NL	+ 0.6	+ 1.3	+ 0.6	-	N.A.	N.A.	+ 0.7	+ 0.6
B/L	+ 5.7	-10.8	- 3.9	+ 2.7	-	N.A.	- 2.2	- 2.3
GR	- 6.5	+ 1.4	- 0.9	-14.8	+ 6	-	- 3.6	+ 1.2

1) N.A. = not available.
2) N.C. = no change

Figure 2.7.: Price Development in relations between D,F,NL,B(L)

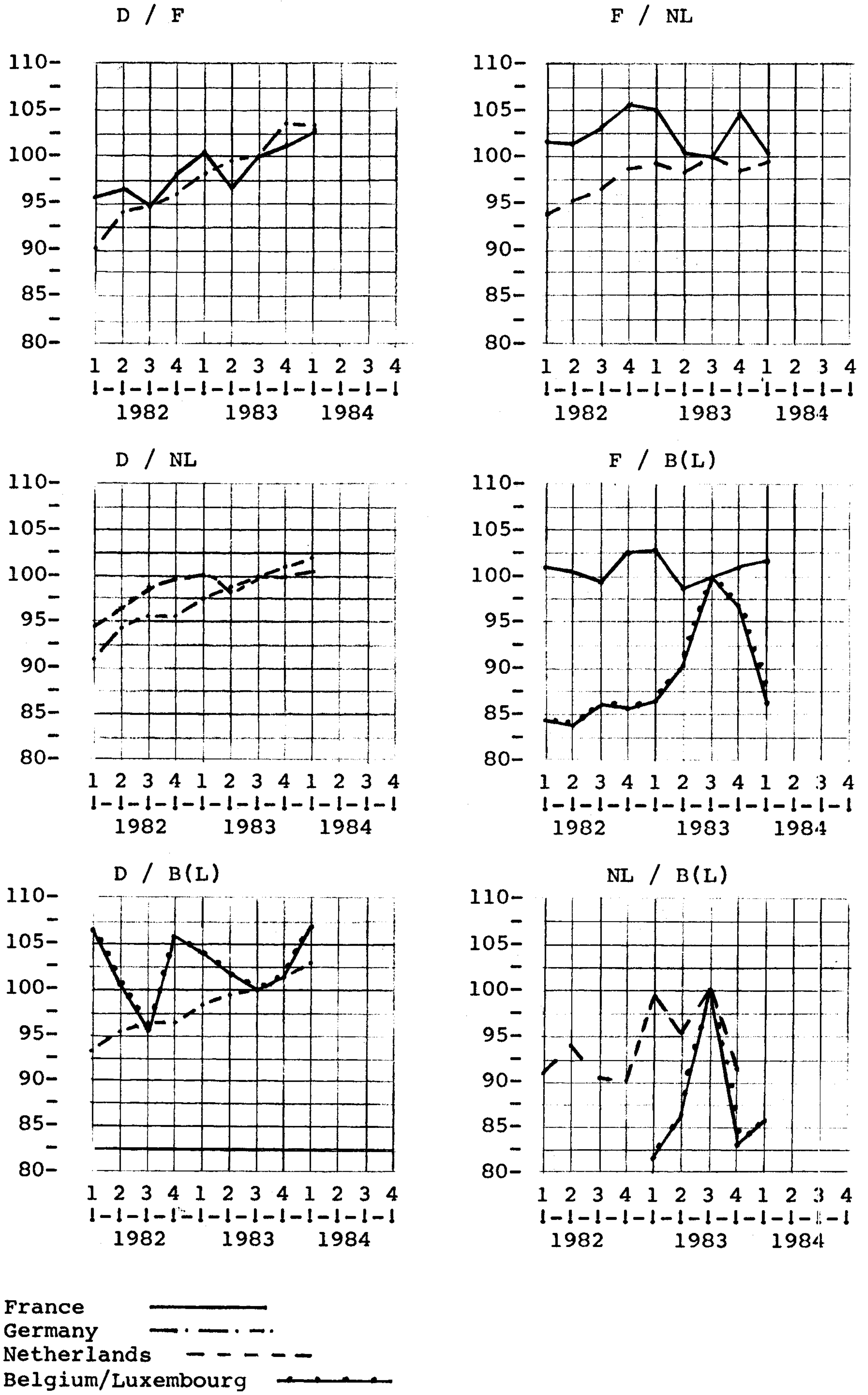
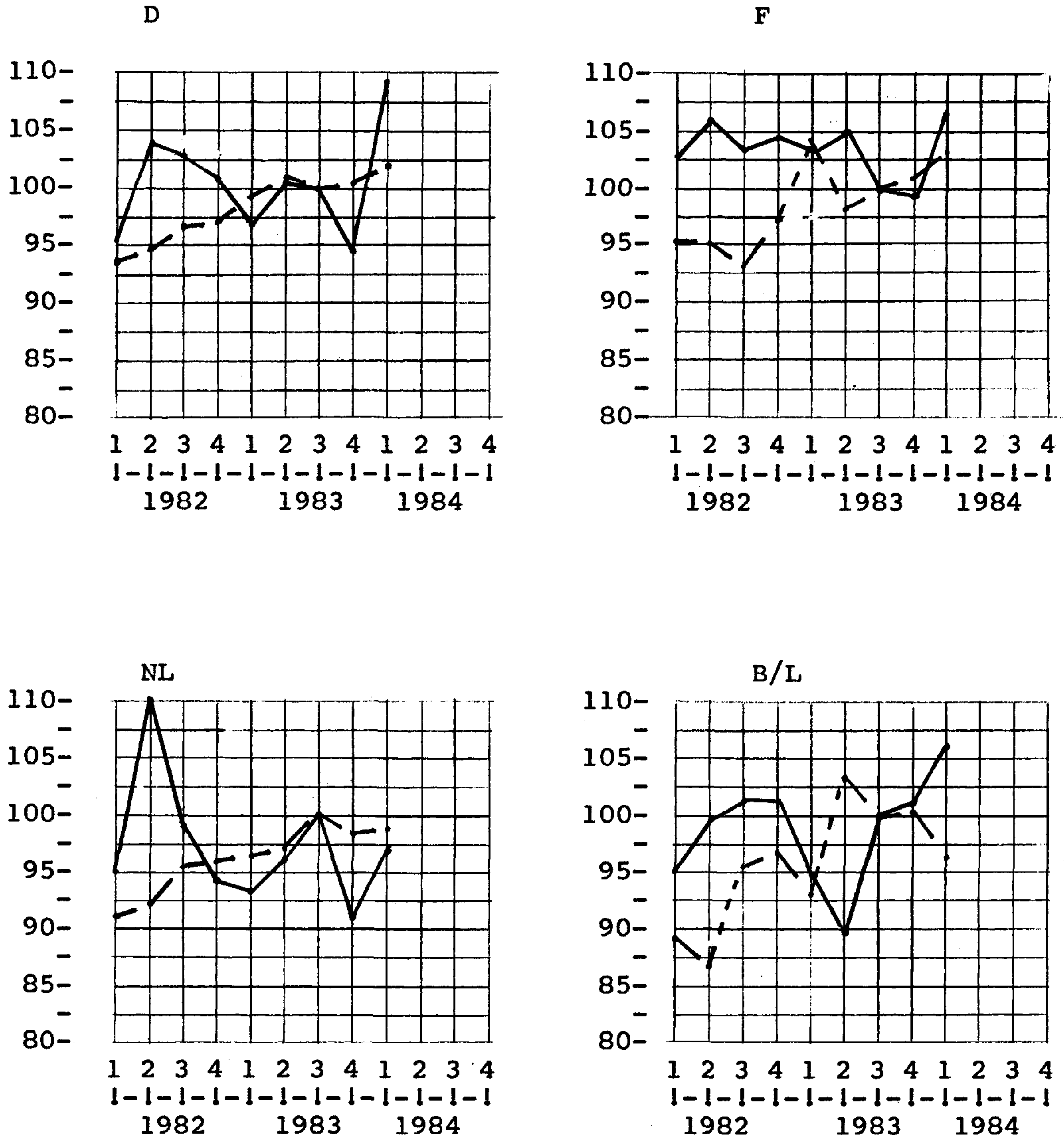


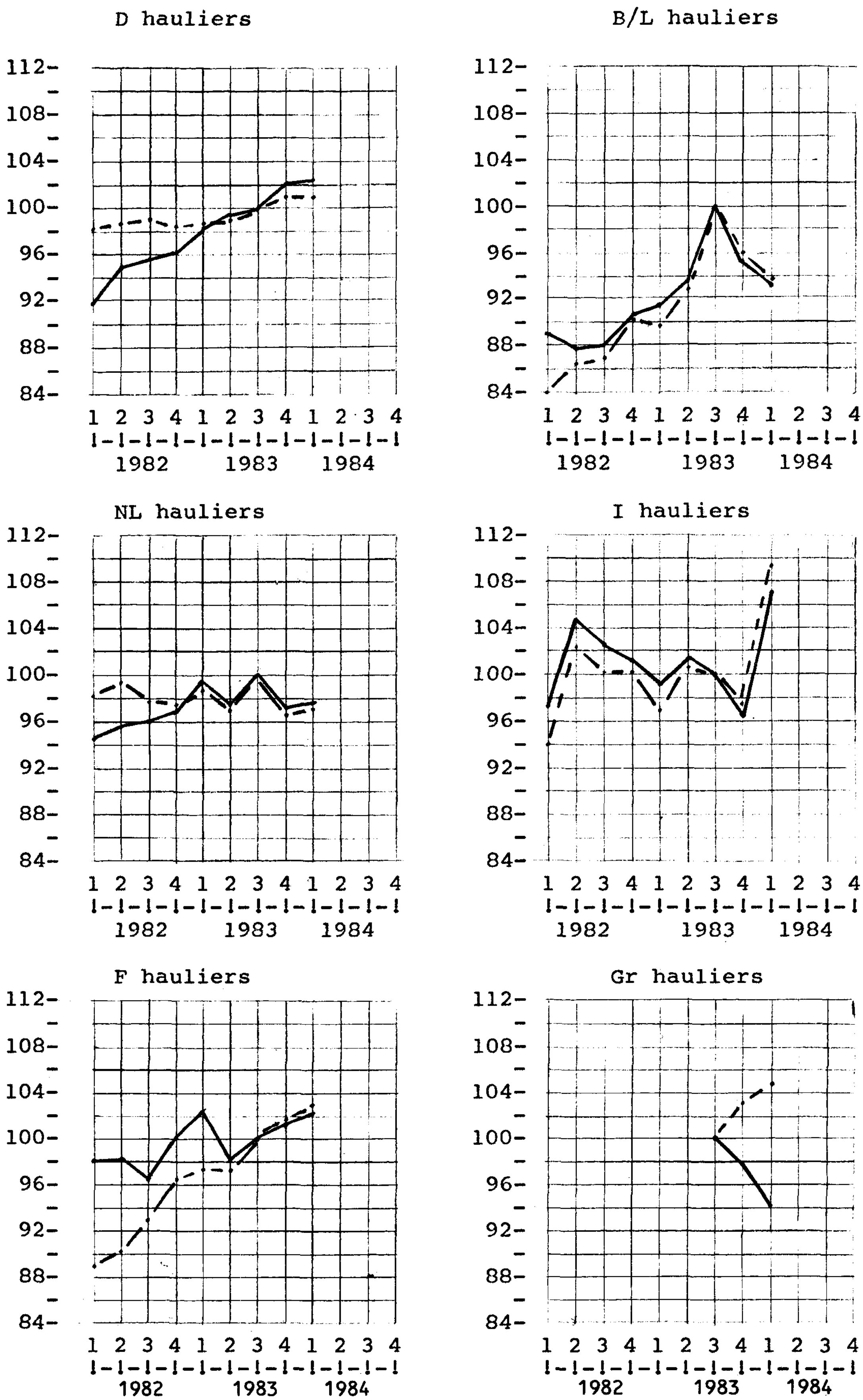
Figure 2.8.: Price Development in relations with Italy



_____________ Italian hauliers

------------- Partner country hauliers.

Figure 2.9.: Effects of changes in exchange rates



Indices at current prices (in national currencies) relations with D, F, NL, B and L. —•—•—•—
Indices at current prices in ECU. ————————

SECTION 3

WATERWAY SURVEYS

3.1. Rhine traffic

3.1.1. Activity

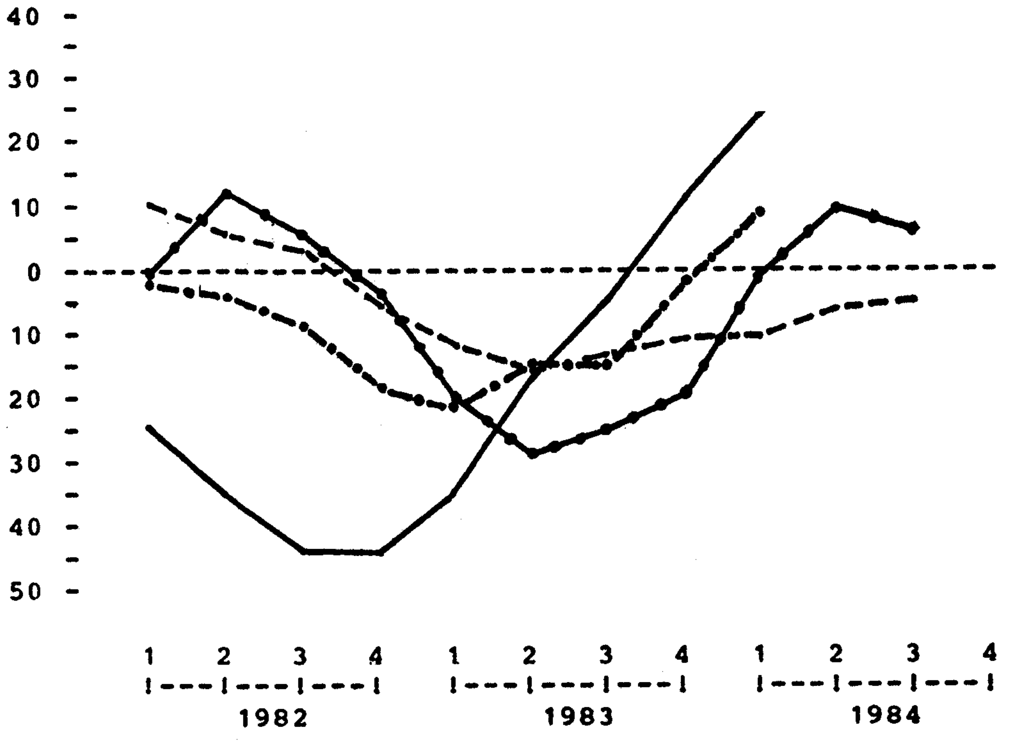
In the opinion of shippers participating in the survey a further improvement in the level of activity could be noted during the first quarter 1984. Consequently, the moving average (calculated on the balance of opinion for the last four quarters) rose again and became now clearly positive (figure 3.1.).

Statistical evidence confirms the results of the survey. International Rhine traffic monitored at the Dutch-German border increased by 10.2% compared to the first quarter 1983, after an increase of 5.3% and 5.2% during the third and fourth quarter.

33.2 million tonnes passed Emmerich/Lobith which brought activity back to the same level as during the first quarter 1979. Upstream traffic increased by 5.4% (22.2 mio tonnes) and downstream traffic by 21.3% (11.0 mio tonnes).

Figure 3.1. : Rhine : Indicators of activity and utilisation of capacity (moving averages)

Aggregate balance of opinions (in percentage)



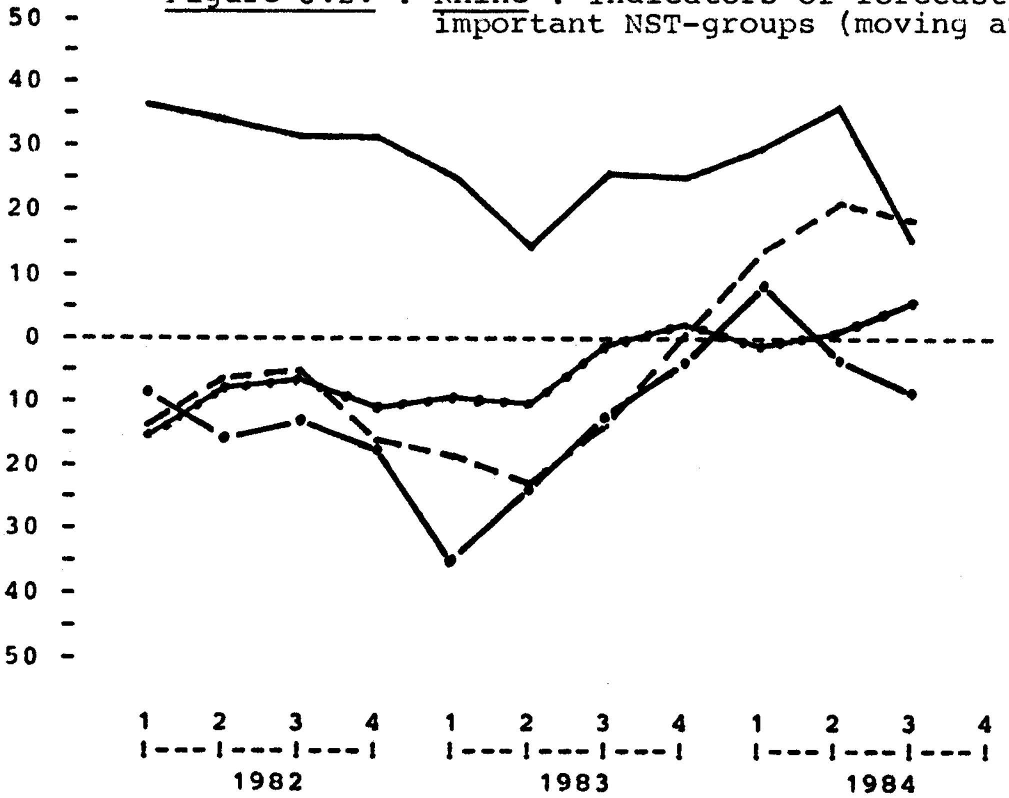
——— 4 quarter moving average actual activity
—•—•— 4 quarter moving average forecast activity
•—•—•— 4 quarter moving average actual utilisation of capacity
— — — 4 quarter moving average forecast utilisation of capacity

3.1.2. Forecasts

Activity is expected to become stagnant after the second quarter 1984. Forecast of utilisation of capacity is rising gradually, but is still considered to be at too low a level. Overcapacity is therefore expected to remain.

By commodity group, forecasts are shown in figure 3.2.

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



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

In the opinion of the shippers questioned transport activity for coal and ore will decrease following a decrease in production-capacity of the steel industry. Transports of sand and gravel will increase slightly while oil transports are expected to remain stable.

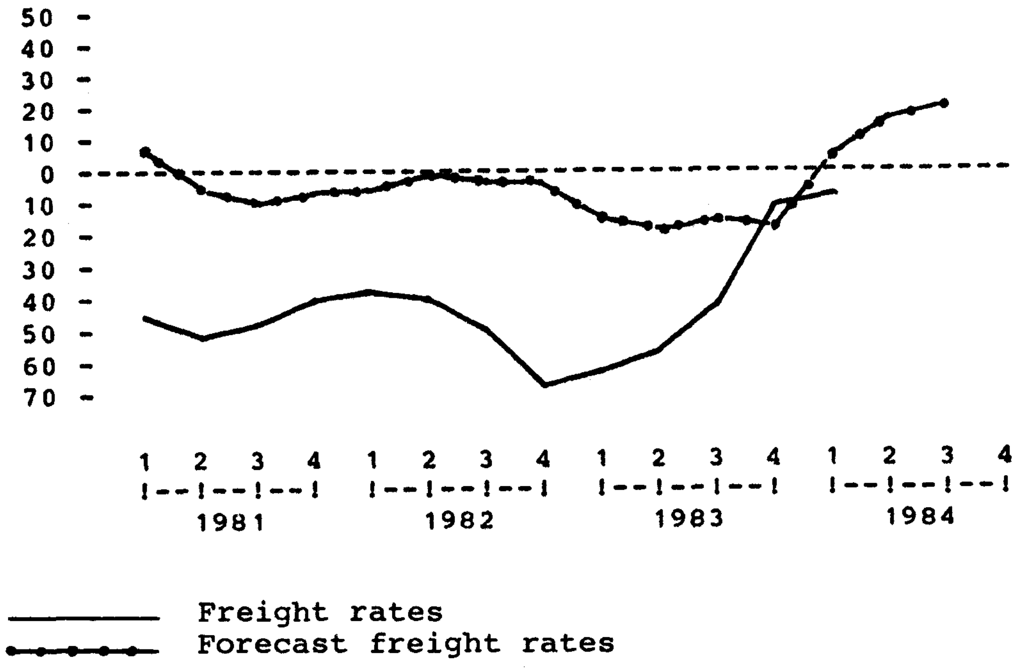
During the first quarter 1984, compared to the same quarter of 1983 upstream transport of coal as monitored at the Dutch/German border increased by 6.7%, of ore by 18% while oil transports decreased by 8.3%. In downstream traffic carriage of sand and gravel increased by 6.3%.

3.1.3. Freight rates

Shippers report that rates were stagnant during the first quarter 1984. This confirms the earlier statement on continuing overcapacity. However, a further slight recovery of rates is expected during the second and third quarter 1984.

Figure 3.3 : Rhine : Developments in freight rates (moving average)

Aggregate balance of opinions (in percentage)



3.2. North-South traffic

3.2.1. The results for the second quarter 1984 on the North-South links show an improvement to the first quarter 1984 and the second quarter 1982 and 1983.

The balance of opinion on demand during 1982, 1983 and 1984 is as follows:

1982				1983				1984			
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
-57	-28	-67	-43	-58	-45	-49	- 3	-39	-24		

The time series above clearly shows the annual cyclical developments in which the second and fourth quarter show more transport activity than the first and third quarter.
On the other hand the trend becomes clear by comparing the same quarter of different years. The second quarter 1983 was the first quarter during which an upward movement could be noted. This positive trend still continues.

Although no survey is carried out in France, the statistical data available indicate that transport activity through North-South links, measured in tonnes, increased by 2.3% for French exports, and decreased by 4.6% for imports compared to the same quarter of last year. In the overall situation a slight decrease could be noted (- 1.3%).

The positive trend is largely confirmed by the change in the balance of opinions on the various bilateral relations, the second quarter 1984 compared with the same quarter of last year, as shown in the following table.

Table 3.1. : Changes in activity assessment (difference in respective balance of opinion) by Dutch and Belgian shippers, Q2 1984 over Q2 1983 by bilateral relation.

From \ To	B	F	NL
B	0	- 3	+18
F	-33		+ 4
NL	+ 9	+ 2	+10

As it appears from the table the positive trend is due to the opinion of the Dutch transporters.
The assessment of the owner/operators is largely confirmed by French statistics: French traffic to Belgium decreased by 2.1% while traffic to the Netherlands increased by 18.6%. French ingoing traffic from Belgium decreased by 7% and traffic from the Netherlands increased by 9.7%.
French domestic traffic decreased by 7.7%.

Also in the assessment of the market situation by tonnage-class the difference between Dutch and Belgian owner/operators becomes clear.

Table 3.2.: Changes in activity assessment by Dutch and Belgian shippers Q2 84 over Q2 83 by tonnage class.

Tonnage class	Belgian shippers	Dutch shippers	Total
200- 450	- 8	+ 26	+ 15
451- 750	+ 25	+ 23	+ 24
751-1150	- 2	+ 19	+ 11
1151-1550	- 30	+ 73	+ 47
1551	- 24	+ 58	+ 19

The feeling of the Dutch owner/operators was that the situation on the market improved, while the Belgian owner/operators felt in general a worsening of market conditions.
However, both Belgian and Dutch owner/operators are of the opinion that the market situation is still unsatisfactory.

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

The following figures show the development of waiting time on the various bilateral relations during the second quarter 1984 in comparison with the second quarter 1983.

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

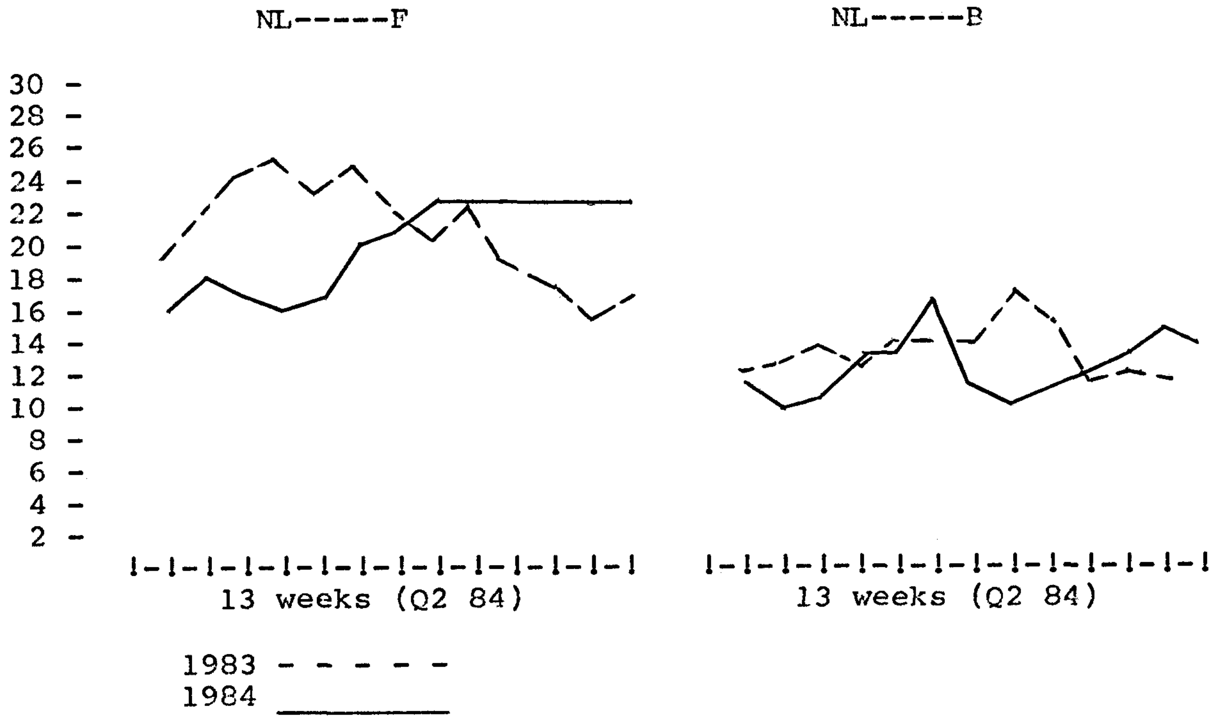


Figure 3.5.: Weekly average of waiting days in North-South traffic, from Belgium to France, including Belgian domestic traffic, and from Belgium to The Netherlands (bourse of Antwerp), first quarter.

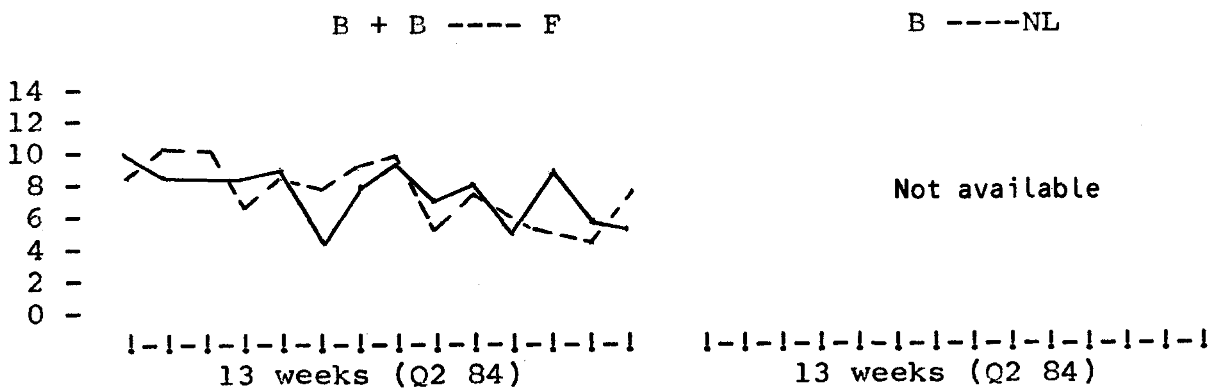
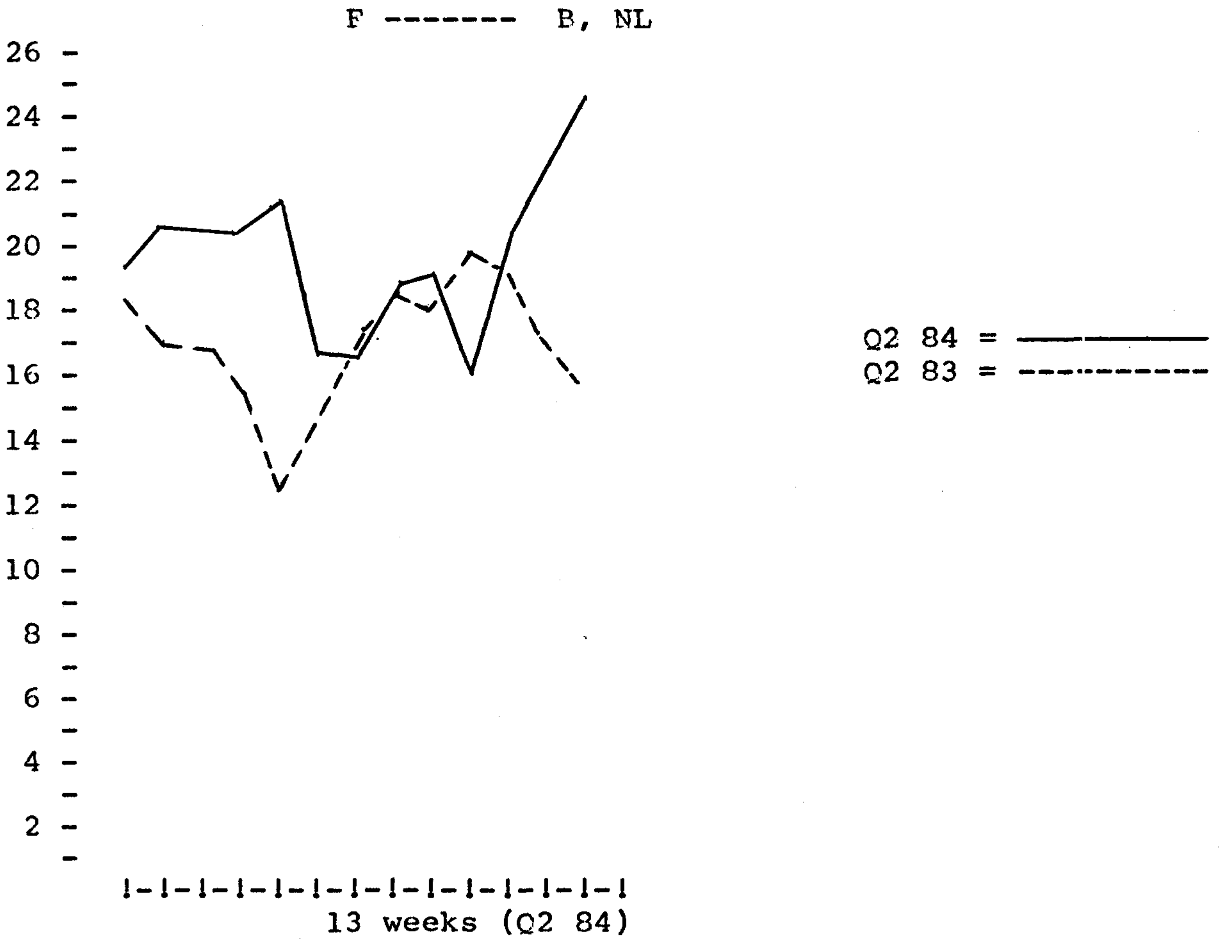


Figure 3.6. Weekly average of waiting days in North-South traffic from France, first quarter.



The general picture from these figures is the following:

The number of waiting days remains at a very high level, although traffic has been increasing gradually since mid 1983. The increased capacity is clearly an important reason why the market is still depressed.

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
	1984	10.5	11.0		
F	1981	8.5	7.0	15.3	14.0
	1982	9.2	18.0	16.1	12.5
	1983	20.9	17.0	21.0	16.2
	1984	19.0	19.6		
NL	1981	8.3	4.4	5.6	3.0
	1982	6.5	6.2	9.8	7.1
	1983	6.9	6.9	8.5	4.9
	1984	6.2	6.8		

3.2.3. Prices

More than 90% of the Dutch and Belgian shippers were of the opinion that freight rates were stable during the second quarter compared to the previous quarter. The balance of opinion of Belgian transporters changed back to negative (-21), indicating an average freight level lower than the previous quarter. However, the balance of opinion of Dutch shippers was only slightly negative (-2).

3.2.4. Forecasts : Pessimism

Forecasts by Belgian inland waterway transporters for the third quarter 1984 compared with the second quarter are less pessimistic. Dutch transports are much more pessimistic. Related to the third quarter 1983 a slight improvement of the market is expected.

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

	1982			1983				1984		
Country/Quarter	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
B	-23	-33	-40	-64	-52	-49	+32	-50	-47	-32
NL	-8	-48	-6	-31	-24	-18	+21	-20	+23	-68
Total	-13	-43	-17	-42	-33	-28	+28	-32	-6	-24

Consequently, waterway transporters in Belgium expect negative developments on freight rates compared with the previous quarter. Dutch transporters are also pessimistic as far as freight rates are concerned.

Table 3.5. : Balance of opinion on forecasts of freight rates level in the next quarter.

	1982			1983				1984		
Country/Quarter	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
B	-10	-8	0	0	-6	-6	+21	-3	-11	-16
NL	-12	-8	0	-10	-12	-13	+35	-35	+19	-6
Total	-13	-43	-17	-42	-33	-28	+28	-32	+6	-10

SECTION 4

RAIL SURVEYS

4.1. Rail activity

Table 4.1.: EUR-10 tonnage evolution (in percentages)
Q1 84/Q1 83 by transport relation

From \ To	D	F	I	NL	B+L	UK	IRL	DK	GR	EUR 10
D	-	+ 5	+25	+42	+35	-29	-	-25	+23	+17.5
F	+ 6	-	+42	- 2	+16	+36	-	+11	+ 5	+23.7
I	+27	- 12	-	+ 7	+35	+84	-	+33	+12	+13.8
NL	+22	+ 34	+30	-	+23	+21	-	-40	-18	+24.9
B+L	+17	+ 17	+34	+29	-	+33	-	+22	- 8	+21.0
UK	+ 6	+ 11	+50	-68	+48	-	-	N.C.	N.A.	+27.0
IRL	-	-	-	-	-	-	-	-	-	-
DK	-22	- 17	+83	-33	+11	-100	-	-	N.C.	-15.6
GR	+70	+700	+50	+14	N.C.	N.A.	-	N.C.	-	+60.0
EUR 10	+15.4	+ 9.3	+34.7	+26.2	+24.8	+35.4	-	-20.1	+18.7	+20.0

Total international intra EUR-10 rail transport of goods increased by 20% in the first quarter of 1984 compared to the same quarter of the previous year.

The significant increase, which confirms the positive trend initiated at the end of 1983, was registered on all relations excluding traffic to and from Denmark, where the drop in tonnage moved was of about -19% (mainly due to the fall on the important traffic relation with Germany).

When comparing the changes in ingoing and outgoing flows to and from EUR-10, for each Member State, it can be seen that for D, NL, B+L and the UK, the increase in one direction was more or less balanced by the increase in the other.

On the other hand, the increase of outgoing traffic was much higher than of incoming traffic for GR and F, while the opposite trend was registered for Italy.

4.2. Railway Price Indices

4.2.1. Coverage

Price surveys are now being carried out in Germany, France, Italy, Belgium and Netherlands. The five 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).

4.2.2. Price developments by relation

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

A) SNCF's Elaboration

For all the representative commodities for all the relations given by SNCF there was no change in the tariffs from the previous quarter.

France-Italy

31.12.81	31.3.82	30.6.83	30.9.83	31.12.83	31.3.84	30.6.84
100	124.22	131.51	132.26	134.12	135.97	135.97

France-Germany

31.12.81	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84	30.6.84
100	113.75	113.84	114.13	115.71	117.61	117.61

France-Belgium

31.12.81	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84	30.6.84
100	115.33	115.33	117.71	125.21	126.56	126.56

France-Netherlands

31.12.81	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84	30.6.84
100	111.67	113.56	119.90	121.64	122.16	122.16

B) DB's Elaboration

Except for the Germany-Belgium relation, there was no change from the previous quarter.

Germany-France

31.12.81	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84	30.6.84
100	113.65	113.98	113.98	115.68	118.96	118.96

Germany-Belgium

31.12.81	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84	30.6.84
100	106.78	111.60	112.24	112.24	114.06	115.84

Germany-Netherlands

31.12.81	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84	30.6.84
100	110.60	110.60	111.16	111.16	114.21	114.21

Germany-Luxembourg

31.12.81	31.12.83	31.3.84	30.6.84
100	109.02	111.44	111.44

C) FS's Elaboration

Italy-France

31.12.81	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84	30.6.84
100	120.77	127.33	127.33	130.47	132.52	132.52

For both sectors there was no change in the tariffs from the previous quarter.

D) SNCB's Elaboration

Except for oil in Belgium-Germany relations, there was no change in tariffs from the previous quarter.

Belgium-France

31.12.81	31.12.83	31.3.84	30.6.84
100	125.05	125.84	125.84

Belgium-Netherlands

31.12.81	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84	30.6.84
100	113.93	113.93	116.29	116.29	119.50	119.50

Belgium-Germany

31.12.81	31.12.83	31.3.84	30.6.84
100	120.83	121.58	121.95

Belgium-Italy

31.12.81	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84	30.6.84
100	117.69	123.60	124.92	129.28	130.98	130.98

For the 13 representative commodities of this relation, the evolution of price indices varies considerably for both carriers. For SNCB it is between 19-39% and for FS it is between 39-60% (since the 31.12.1981).

E) NS's Elaboration

For all the relations there was no change in the tariffs from the previous quarter.

Netherlands-France

31.12.81	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84	30.6.84
100	106.54	107.89	108.28	112.01	112.01	112.01

Except for containers, for all the other representative commodities in the Netherlands sector, the price index has been below about 1,5-2% from the base established on 31.12.81.

Netherlands-Germany

31.12.81	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84	30.6.84
100	109.46	109.46	110.05	110.05	112.37	112.37

In the second quarter of 1984 tariffs of the Netherlands sector show an average increase of 14-19% since 31.12.81 and for the Germany sector 4-14%.

Netherlands-Belgium

31.12.81	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84	30.6.84
100	115.16	115.16	117.69	122.21	123.84	123.84

Except for containers the evolution of price indices was almost the same for the two sectors.

SECTION 5

COMBINED TRANSPORT

5.1. Container traffic

Intercontainer's traffic position in the second quarter indicated a continuing strong market for international rail container services.
The second quarter traffic in 1984 was 4% over the corresponding quarter in 1983.

Demand from shipping interests for movement of containers to and from container ports was high. Exports to the USA continued at a high level, sustaining container cargo volumes, especially on routes to Rotterdam, Bremerhaven and Antwerpen.

Other Intercontainer maritime traffics which show growth over 1983 are between Austria and ports in northern and southern Europe, and between France and Benelux ports.

The overall position in rail container traffic of maritime containers was, at 116,000 TEU, 2% over the 1983 level for the 2nd quarter.

Continental traffic that is, movements by container services of purely intra European cargo, continues to grow rapidly.
After a record year in 1983, growth of 7% in the Q2 84 suggests that 1984 will end at another record level. This traffic includes ISO and non-ISO large containers, and the swapbody element in it is now rising again.

Total Intercontainer traffic at mid 1984 had reached almost 407,000 TEU, so that a year-end total of around 800-820,000 TEU with normal trends should be possible.

The general demand level is therefore shown to be favorable, but the competitive position continues to concentrate attention on price levels for transport services.
It should be noted that growth in 1983 and 1984 in inland and deepsea container land transport markets only means that in 1984 the overall level of 1980 should again be reached.

The prolonged period of over-capacity for transport services therefore still affects rates and competition, and in this period the Rhine as a container carrier has also captured a substential market share in those areas, mainly in the Federal Republic of Germany which it serves.

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.
The first quarter of 1984, compared to the fourth quarter of 1983, shows a marked increase in the overall growth rate.

5.2.1. International traffic by companies based in the Community

Country of despatch		Units despatched Q1/84	% change from Q4/83	% change from Q1/83
Kombiverkehr	D	17750	19	42
Novatrans	F	2370	-6	13
	I(except to D)	5242	*	25
	UK	1509	14	40
FERPAC	I (to D)	3086	17	68
Trailstar	NL	1885	43	35
TRW	B	4051	0	46
Total		35893	20*)	39

(*) without the relation I-B in Novatrans Italy.

While there were some exceptions in different relations, figures were much better in the first quarter of 1984 compared to the fourth quarter of 1983.

Kombiverkehr in this quarter achieved a 50% share of the market. 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 2388. Novatrans, trading in France in total traffic has a considerable decrease of -6% due mostly to the F/D relation.

For Ferpac and Trailstar, the units despatched in the first quarter show again positive figures. TRW figures registered positive figures for relations via France and negative figures for relations via Germany.

5.2.2. Important intra-Community relations (over 1000 units in Q1/84)

Relation	Units despatched Q1/84	% change from Q4/83	Q1/82
D ------ I	9318	24	82
F ------ I	1482	-3	-6
I ------ F	1486	-2	-3
I ------ UK	1515	-1	18
I ------ B	2241	*	63
UK ------ I	1492	13	42
I ------ D	3086	17	68
H ------ I	1510	40	36
B ------ I	2573	-4	44
Total	24703		

(*) figures for this quarter are not available.

ORGANISATIONS UNDERTAKING SURVEYS

(a) Road Opinion Survey

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

(b) Road Cost Survey

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

(e) <u>Inland Waterway Cost Survey</u>

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) <u>Rail Price Indices</u>

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

(g) <u>Combined Transport</u>

Intercontainer (container transport)
Interunit (piggyback transport)

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