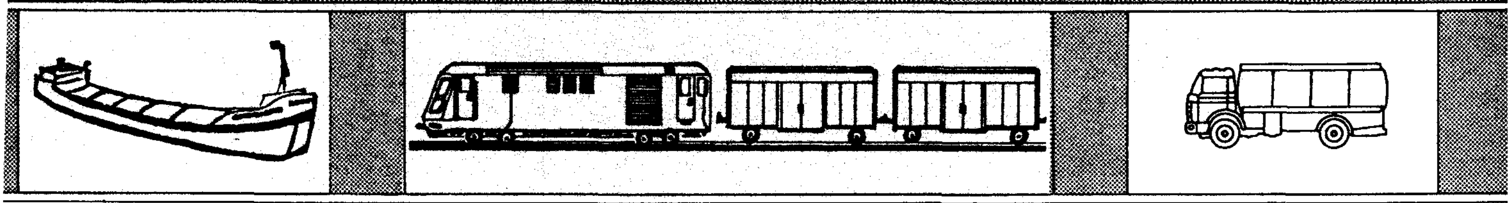
EUROPEAN COMMUNITIES

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 report the results of the Observation of the Transport Market System.
The following three reports are published:

- Analysis and Forecasts
- Annual Report
- Market Developments

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

- recent developments in the goods transport market between Member States by road, rail, inland waterway (Q2 84) and combined transport (Q2 84 or Q3 84)

- the results of quarterly opinion surveys carried out among international road hauliers (Q3 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 (Q2 84)

- the results of quarterly opinion surveys among inland waterway operators on two international networks, i.e. the Rhine (Q2 84) and the North/South (Q3 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 (Q3 84).

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

SUMMARY

	ITEM	EVOLUTION		CHAPTER
3 MODES	EUR-10 tot. tonnage	↗	+ 7.1 % Q2 84/Q2 83	table 1.1
ROAD	EUR-10 tonnage	↗	+ 4.7 % Q2 84/Q2 83	table 1.1
	Modal share	↘	- 0.9 % Q2 84/Q2 83	" 1.2
	Costs nat. currency	↗	+ 0.7 (D and B/L)	chap.2.2.3
	Prices nat. curr.	↗	Max.= + 2.9 % (GR)	chap.2.3.3
		↘	- 3.5 % (It)	" 2.3.3
	EUR-10 traf. matrix		Q2 84/Q2 83 by relat.	table 2.0
INLAND WATER-WAYS	EUR-5 tonnage	↗	+ 9.4 % Q2 84/Q2 83	table 1.1
	Modal share	↗	+ 0.9 % Q2 84/Q2 83	" 1.2
	Total costs (ECU)	↗	+ 2.5 % 1.7.84/1.1.84	table 3.6
RAIL	EUR-10 tonnage	↗	+ 7.2 % Q2 84/Q2 83	table 1.1
	Modal share	→	- % Q2 84/Q2 83	" 1.2
	EUR-10 traf. matrix		Q2 84/Q2 83 by relat.	" 4.1
COMBINED TRANS-PORT	Rail container traffic	↗	+ 11 % Q3 84/Q3 83	chap. 5.1
	Piggy-back traffic	↗	+ 0.9 % Q2 84/Q2 83	" 5.2.1

N.B. : Q2 84/Q2 83 represents the evolution of the second quarter of 1984 compared to the second quarter of 1983.

SECTION 1

GENERAL MARKET ASSESSMENT - ALL MODES

Road - Rail - Inland Waterways

Second quarter 1984

The total tonnage for all three modes in the second quarter 1984 (Q2 84) was up + 7.1 % on the same quarter of the previous year (Q2 83) and was the highest tonnage registered since more than two years.

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

Mode	Mio Tonnes Q2 84	Mio Tonnes Q2 83	% change Q2 84/Q2 83
Road	46.6	44.5	+ 4.7
Rail	16.1	15.0	+ 7.2
I.W.	51.1	46.7	+ 9.4
Total EUR-10	113.8	106.2	+ 7.1%

All three modes registered significant improvements in the second quarter of 1984 compared with the same quarter of the previous year.

For the third consecutive quarter, road increase (+4.7%) was below average (+7.1%) even if this mode, as well as Inland Waterways, registered the highest figure in tonnage moved in a quarter since more than two years.

Inland Waterways scored the best result, despite of the strike in France and recovered market share (+0.9%) as illustrated in table 1.2.

Table 1.2. : Modal split (EUR-10)

Mode	Mio Tonnes Q2 84	Modal Split in % Q2 84	Q2 83	Evolution Q2 84/Q2 83
Road	46.6	41.0	41.9	- 0.9 %
Rail	16.1	14.1	14.1	--
I.W.	51.1	44.9	44.0	+ 0.9 %
Total EUR-10	113.8	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	Q2 83/82	Q3 83/82	Q4 83/82	Q1 84/83	Q2 84/83
Road	+ 3.5	+ 7.2	+ 10.4	+ 4.7	+ 4.7
Rail	- 4.6	- 2.0	+ 18.7 R	+ 20.0	+ 7.2
I.W.	+ 1.6	+ 4.2	+ 8.4	+ 10.0	+ 9.4
3 Modes	+ 1.5	+ 4.6	+ 10.7	+ 9.3	+ 7.1

R = revised.

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

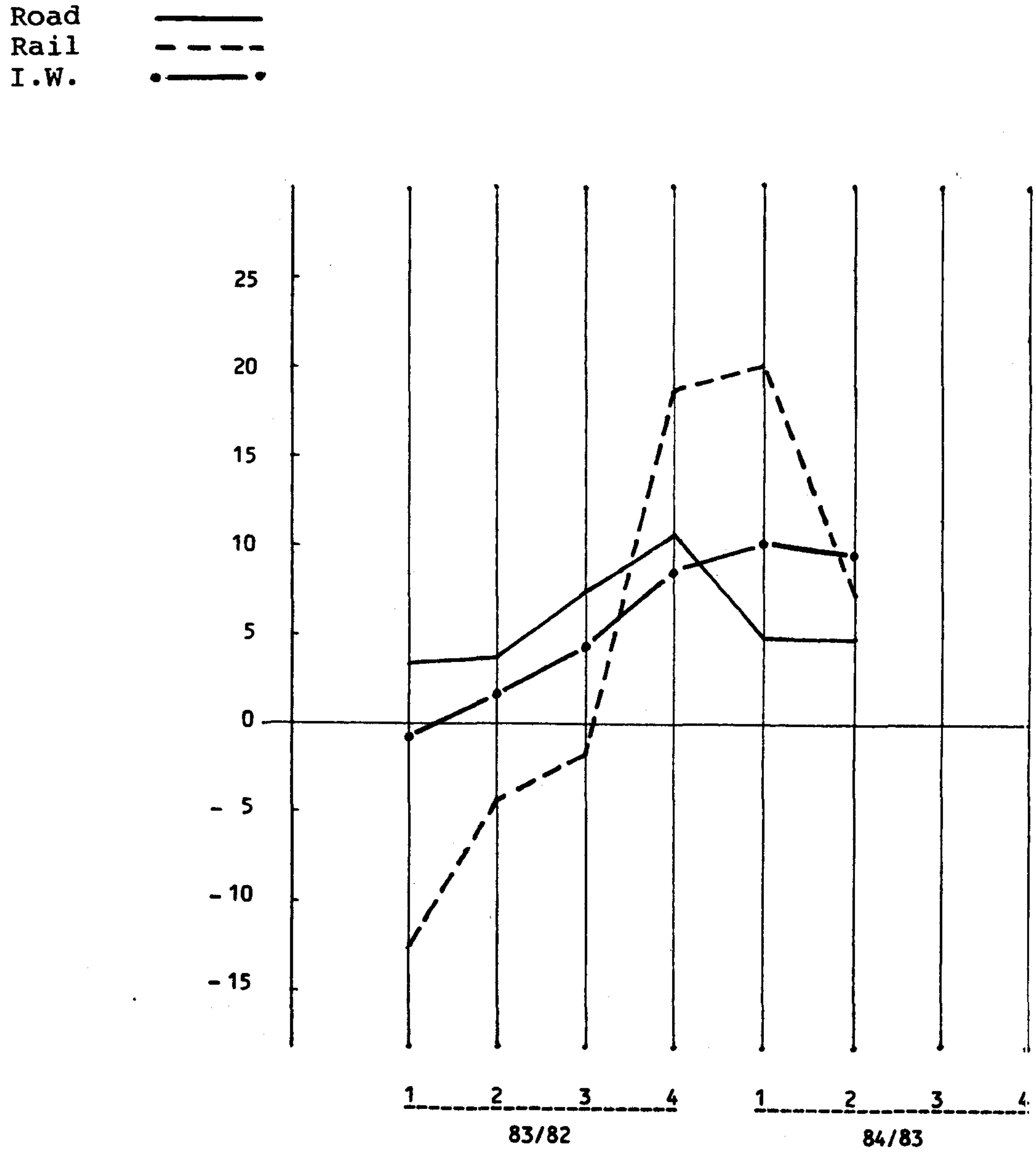
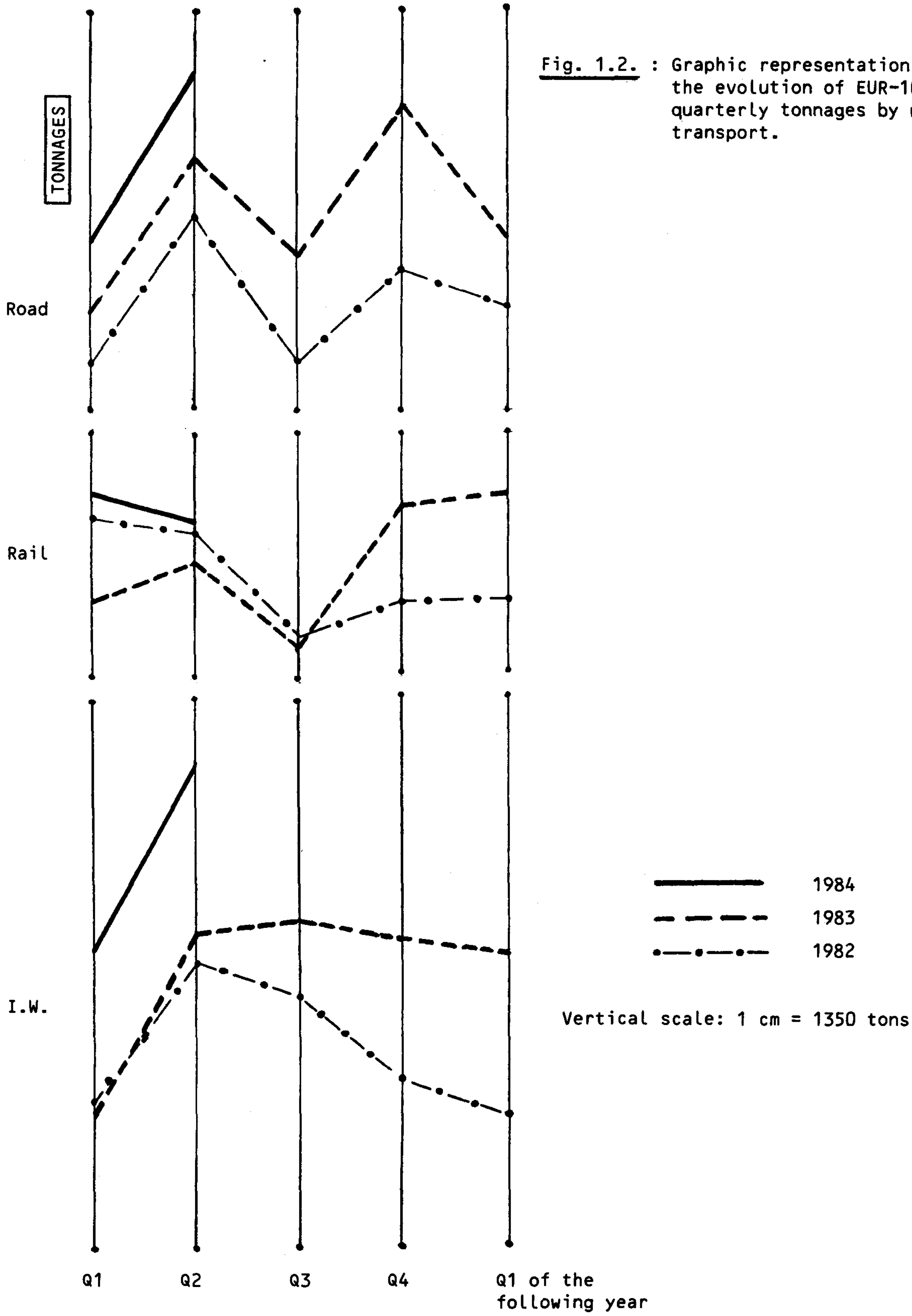


Fig. 1.2. : Graphic representation of the evolution of EUR-10 quarterly tonnages by mode of transport.



2)

SECTION 2

ROAD

Table 2.0.: EUR-10 tonnage evolution (in percentage) Q2 84/Q2 83 by transport relation (1).

From \ To	D	F	I	NL	B+L	UK	IRL	DK	GR	EUR 10
D	x	+8	+17	+ 3	+ 4	+23	+23	+16	+ 9	+6.9
F	+2	x	+ 8	+11	+ 1	+22	- 4	+16	+22	+4.5
I	+4	+1	x	-28	+23	N.A.	N.A.	+23	+52	+2.8
NL	-1	+9	+ 1	x	+12	N.A.	N.A.	+19	+ 7	+5.2
B+L	+1	+3	+20	+ 4	x	+ 2	+ 4	+ 3	-11	+3.0
UK	+12	+7	N.A.	N.A.	- 3	x	N.A.	+20	N.C.	+8.5
IRL	+25	+7	N.A.	N.A.	N.A.	N.A.	x	+35	N.C.	+15.6
DK	- 3	- 4	+ 4	+ 3	+14	+ 5	+63	x	-39	-1.2
GR	+ 2	+ 1	+68	+65	- 4	-28	N.C.	-20.	x	+14.4
EUR 10	+0.7	+4.7	+12.4	+3.3	+6.3	+16.5	- 8.9	+16.0	+14.2	+4.7

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

(1) Excludes B-L and L-B.

Road traffic evolution Q2 84/Q2 83

The increase of the EUR-10 road traffic (average = + 4.7%) was particularly noticeable in inward traffic to Italy, UK, Greece and Denmark and in outward traffic from Germany, UK, Ireland and Greece.

Road tonnage evolution (in percentage) first half 1984 compared to first half 1983.

Member State	Inward traffic from EUR-10 % change $\frac{(Q1+Q2)84}{(Q1+Q2)83}$	Outward traffic to EUR-10 % change $\frac{(Q1+Q2)84}{(Q1+Q2)83}$	Total Inward and Outward % change
D	+ 2.3	+ 7.7	+ 4.9
F	+ 0.9	+ 5.6	+ 3.2
I	+ 8.2	- 3.4	+ 2.5
NL	+ 7.3	+ 4.5	+ 5.8
B+L	+ 6.3	+ 4.1	+ 5.1
UK	+ 17.4	+ 9.8	+ 14.5
IRL	- 10.9	+ 42.6	+ 7.7
DK	+ 10.9	- 4.8	+ 1.7
GR	+ 14.2	+ 18.3	+ 16.3
EUR-10			+ 4.7

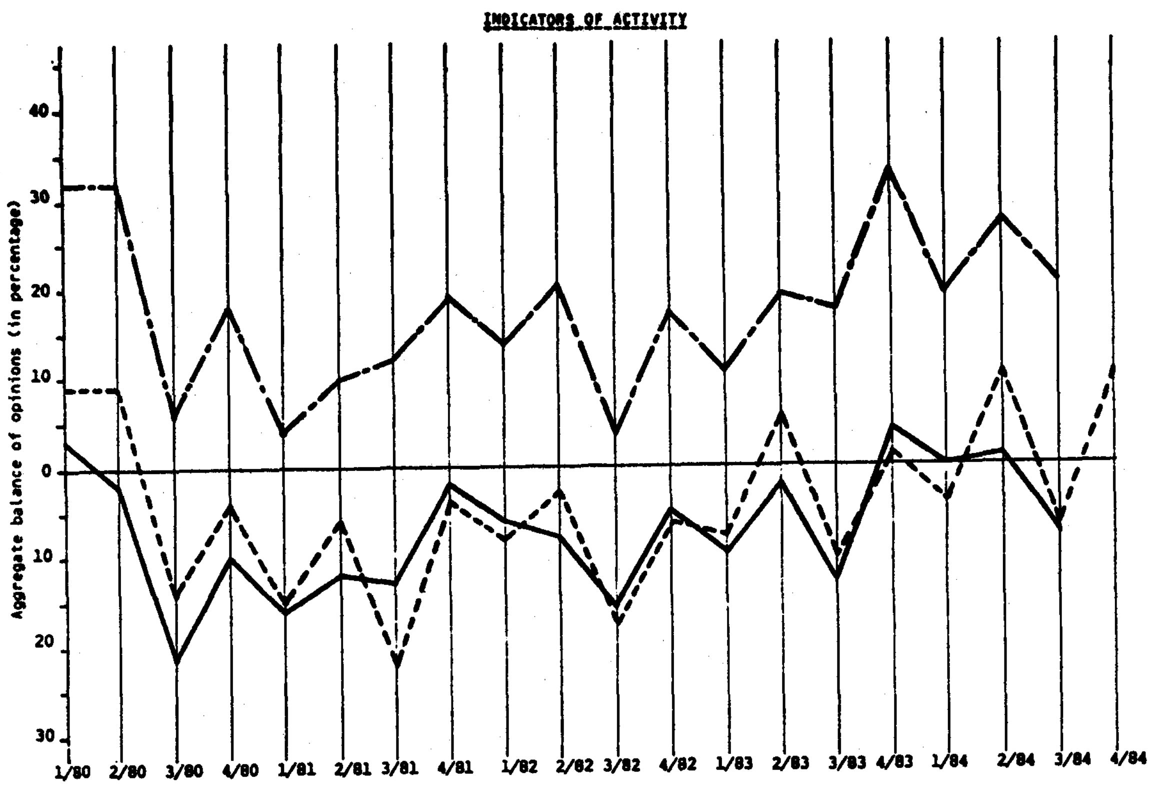
2.1. Road Inquiry Survey

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

Road Transport shows seasonal weakening in third quarter

The inquiry for the third quarter of 1984 indicates a deterioration of 9 percentage points (balance of opinions) compared to the second quarter; compared to the same quarter of the previous year there is an improvement of 5 percentage points.

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



Utilisation of rolling stock
Activity forecast
Activity

2.1.2. <u>Activity</u>: activity level moves downwards in third quarter, but the trend is still upwards.

The decrease in the activity level in the third quarter of 1984 (balance of opinion) is well above the level in the corresponding quarter of 1983.

2.1.3. <u>Forecasts</u>

The forecast for the fourth quarter of the current year indicates a positive trend, as well if compared to the third quarter (+ 18 percentage points) as if compared to the last quarter of 1983 (+ 6 percentage points).

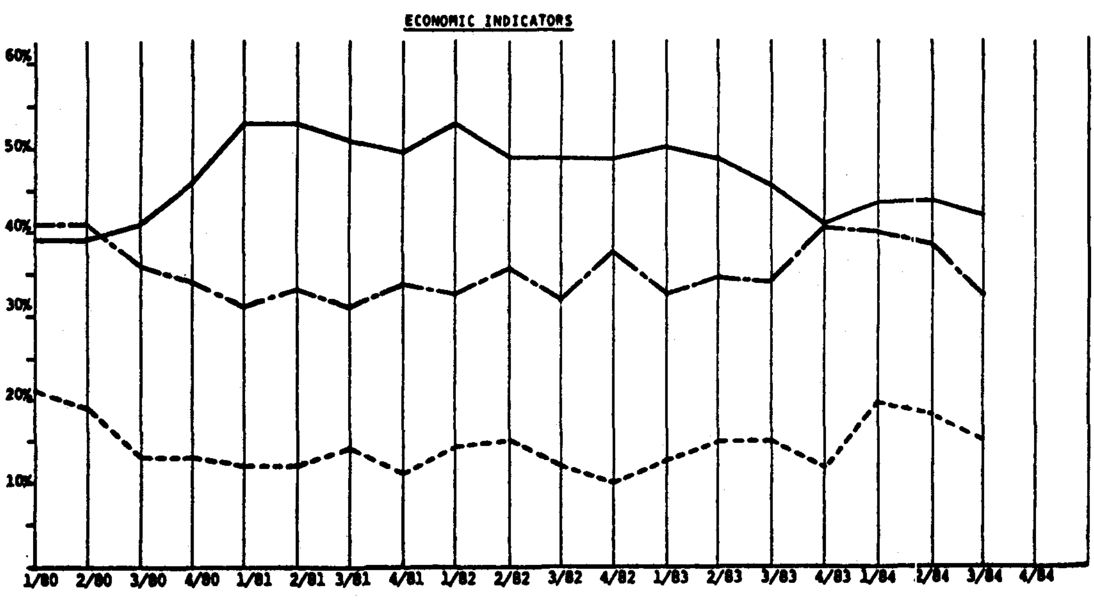
2.1.4. <u>Utilisation of rolling stock</u>

In comparison to the previous quarter the use of the rolling stock has been reduced from 27% to 21% (balance of opinions). Compared to the same quarter one year earlier there is an increase of 3 percentage points.

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

If one makes the necessary corrections for neutralizing the seasonal influence it appears that no important changes are taking place in the economic indicators.

<u>Figure 2.2</u>: Economic indicators



Key : Percentage of firms indicating having had liquidity problems
Percentage of firms indicating having made investments
Percentage of firms indicating having recruited drivers

2.1.6. Recruitment

The number of firms that have recruited drivers has decreased by 3 percentage points if compared to the second quarter of 1984, but stays at the same level as in the third quarter of 1983.

2.1.7. Cash-flow

As far as cash-flow problems are concerned, there seems to be a marginal improvement as the number of firms having cash-flow problems has decreased by 1 percentage point if compared to the second quarter of 1984 and by 4 percentage points if compared to the corresponding quarter of 1983.

2.1.8. Investment

The number of firms declaring having invested in the third quarter has fallen by 5 percentage points compared to the previous quarter and by 2 percentage points if compared to the corresponding quarter the year before.

TAB. 2.1.

ROAD TRANSPORT SURVEY

ECT-0311 | 3. QUARTER 1984

INTERNATIONAL TRANSPORT ACTIVITY | FORECAST : 4. 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	21	17
	=	46	54	48	49	49	55	44	44	48	45	48	53	56	54	52	70
	-	34	28	33	31	29	26	38	33	29	31	31	24	22	26	27	13
	S	-14	-10	-14	-11	-7	-7	-20	-10	-6	-7	-10	-1		-6	-6	4
FRANCE	+	16	14	16	21	18	15	14	15	14	15	11	17	18	18	17	16
	=	41	47	47	47	47	49	50	43	43	49	47	51	53	55	51	60
	-	43	39	37	32	35	36	36	42	43	36	42	32	29	27	32	24
	S	-27	-25	-21	-11	-17	-21	-22	-27	-29	-21	-31	-15	-11	-9	-15	-8
ITALIA	+	15	15	17	18	15	16	14	15	14	15	17	23	16	19	16	26
	=	41	44	42	53	49	47	41	51	45	54	47	49	53	48	47	54
	-	44	41	41	29	36	37	45	34	41	31	36	28	31	33	37	20
	S	-29	-26	-24	-11	-21	-21	-31	-19	-27	-16	-19	-5	-15	-14	-21	6
NEDERLAND	+	30	20	25	26	34	32	26	31	31	37	26	40	31	34	22	38
	=	41	65	49	52	43	45	41	50	44	44	38	42	49	48	38	51
	-	29	15	26	22	23	23	33	19	25	19	36	18	20	18	40	11
	S	1	5	-1	4	11	9	-7	12	6	18	-10	22	11	16	-18	27
BELGIQUE-BELGIE	+	25	28	22	31	28	31	23	30	27	28	21	35	30	31	19	29
	=	46	41	43	44	48	51	43	47	46	51	44	47	47	55	47	60
	-	29	31	35	25	24	18	34	23	27	21	35	18	23	14	34	11
	S	-4	-3	-13	6	4	13	-11	7		7	-14	17	7	17	-15	18
LUXEMBOURG	+	25	27	12	26	28	26	21	25	21	35	26	21	33	29	24	17
	=	46	49	51	61	48	50	51	47	52	49	52	61	44	47	51	68
	-	29	24	37	13	24	24	28	28	27	16	22	18	23	24	25	15
	S	-4	3	-25	13	4	2	-7	-3	-6	19	4	3	10	5	-1	2
UNITED KINGDOM	+	23	21	24	28	28	25	21	24	23	24	20	26	21	24	20	23
	=	49	53	56	59	59	56	63	64	61	63	63	66	66	65	72	75
	-	28	26	20	13	13	19	16	12	16	13	17	8	13	11	8	2
	S	-5	-5	4	15	15	6	5	12	7	11	3	18	8	13	12	21
IRELAND	+	18	24	21	25	21	27	20	28	21	23	23	21	13	16	21	27
	=	30	47	39	40	48	39	38	37	47	50	60	60	68	67	67	65
	-	52	29	40	35	31	34	42	35	32	27	17	19	19	17	12	8
	S	-34	-5	-19	-10	-10	-7	-22	-7	-11	-4	6	2	-6	-1	9	19
DANMARK	+	24	20	21	24	25	26	17	27	26	19	19	29	21	24	22	24
	=	57	65	61	61	65	64	61	62	66	65	64	64	62	65	65	71
	-	19	15	18	15	10	10	22	11	8	16	17	7	17	11	13	5
	S	5	5	3	9	15	16	-5	16	18	3	2	22	4	13	9	19
HELLAS	+				27	16	14	17	28	19	32	24	29	27	23	22	27
	=				47	45	31	34	36	39	39	43	43	45	49	48	49
	-				26	39	55	49	36	42	29	33	28	28	28	30	24
	S				1	-23	-41	-32	-8	-23	3	-9	1	-1	-5	-8	3
E.E.C.	+	20	19	20	24	22	21	19	23	21	24	19	26	23	23	20	24
	=	44	50	47	50	50	50	46	49	48	50	49	52	54	55	52	62
	-	36	31	33	26	28	29	35	28	31	26	32	22	23	22	28	14
	S	-16	-12	-13	-2	-6	-8	-16	-5	-10	-2	-13	4		1	-8	10

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

TAB. 2.2.

ECT-0321

ROAD TRANSPORT SURVEY

UTILISATION OF ROLLING STOCK

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

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

(3)

TAB 2.3.

ROAD TRANSPORT SURVEY

ECT-0331 3. 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	4	8	5	
FRANCE	4	3	4	4	5	3	4	4	6	3	3	3	5	9	5	
ITALIA	22	29	28	22	21	24	18	16	17	25	19	20	15	19	17	
NEDERLAND	15	19	14	11	18	19	19	8	15	25	18	16	32	28	26	
BELGIQUE-BELGIE	17	18	19	10	21	26	19	15	18	22	21	15	23	28	21	
LUXEMBOURG	35	30	14	27	21	31	28	27	42	35	44	28	38	38	24	
UNITED KINGDOM	12	10	19	25	21	19	20	21	18	26	25	22	20	28	20	
IRELAND	24	12	12	24	17	15	10	19	21	15	27	24	26	20	43	
DANMARK	12	8	17	7	14	20	6	11	10	13	15	12	25	20	16	
HELLAS				40	36	24	25	20	29	28	25	19	22	22	22	
E.E.C.	12	12	14	11	14	15	12	10	13	15	15	12	16	18	15	

TAB. 2.4.

ROAD TRANSPORT SURVEY

ECT-0341 3. 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	22	
FRANCE	67	66	64	61	64	60	60	57	64	65	59	59	59	57	53	
ITALIA	65	72	70	70	72	76	69	70	76	76	68	63	72	66	63	
NEDERLAND	19	16	18	15	18	12	11	10	13	6	7	3	6	3	3	
BELGIQUE-BELGIE	27	39	28	32	32	27	26	31	27	26	21	21	21	14	20	
LUXEMBOURG	63	15	43	27	57	38	40	42	27	16	19	15	23	17	43	
UNITED KINGDOM	64	57	57	51	56	49	53	50	49	44	42	41	46	47	33	
IRELAND	79	59	53	51	58	58	50	59	59	55	42	43	40	45	44	
DANMARK	26	23	31	29	32	21	32	18	20	19	17	6	16	8	9	
HELLAS				63	54	76	79	69	72	68	76	67	60	57	59	
E.E.C.	53	53	51	50	53	49	49	49	50	49	46	41	43	43	42	

TAB. 2.5

ROAD TRANSPORT SURVEY

ECT-0351 3. 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	34	
FRANCE	31	30	27	34	34	35	31	42	29	29	29	34	35	32	28	
ITALIA	26	29	26	27	26	25	21	20	18	24	25	34	24	33	23	
NEDERLAND	38	44	36	47	46	42	43	46	41	47	44	44	58	66	55	
BELGIQUE-BELGIE	30	36	30	29	30	39	32	38	42	40	42	46	41	42	36	
LUXEMBOURG	17	22	21	33	26	29	28	47	38	20	47	39	33	31	46	
UNITED KINGDOM	30	52	50	49	53	63	61	67	49	67	68	65	71	74	62	
IRELAND	28	27	30	29	25	22	27	19	31	24	44	46	55	36	49	
DANMARK	35	39	44	40	43	45	35	42	43	51	51	55	53	52	52	
HELLAS				46	33	42	24	29	42	34	34	37	42	22	37	
E.E.C.	31	33	31	34	33	36	32	38	33	35	35	41	40	38	33	

2.2. Cost Indices

2.2.1. Coverage

Cost indices surveys are conducted in seven countries : Germany, France, the Netherlands, Belgium /Luxembourg, United-Kingdom and Denmark. Results have not yet been received from Italy, Ireland and Greece. The German and the Dutch surveys have traditionally given a breakdown of the cost factors by geographical relation. For the first time however, we have received the Belgium-Luxembourg breakdown by relations. The old figures are replaced by more accurate ones. The analysis of the surveys of France, the Netherlands, United-Kingdom and Denmark for the first six months period have already been given in our report N° 13.

The indices relate to the transport of goods by road between Member States.

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 2.3. 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, cost indices increased slightly for Germany and Belgium/Luxembourg (+0.7% each).

In ECU, total costs increased much more for Belgium/Luxembourg (+4.1%) than for Germany (+1.7%).

2.2.4. Fuel cost developments : First half of 1984

In national currency, fuel costs decreased as well for Germany (-4 %) as for Belgium/Luxembourg (- 5.1.%).

In ECU, fuel costs decreased more for Germany (-3.5%) than for Belgium/Luxembourg (-1.4%).

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	90.7
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)					100,0	106,1	113.3	108,6	113,9	108.8
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	99.1
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					100,0	98,0	104.6	99,2	101,2	99.8
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	104.2
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)					100,0	105,6	110.2	110,4	114,6	115.3
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	113.9
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					100,0	97,6	101.8	100,9	101.8	105.9
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.

TOTAL COSTS IN ECU

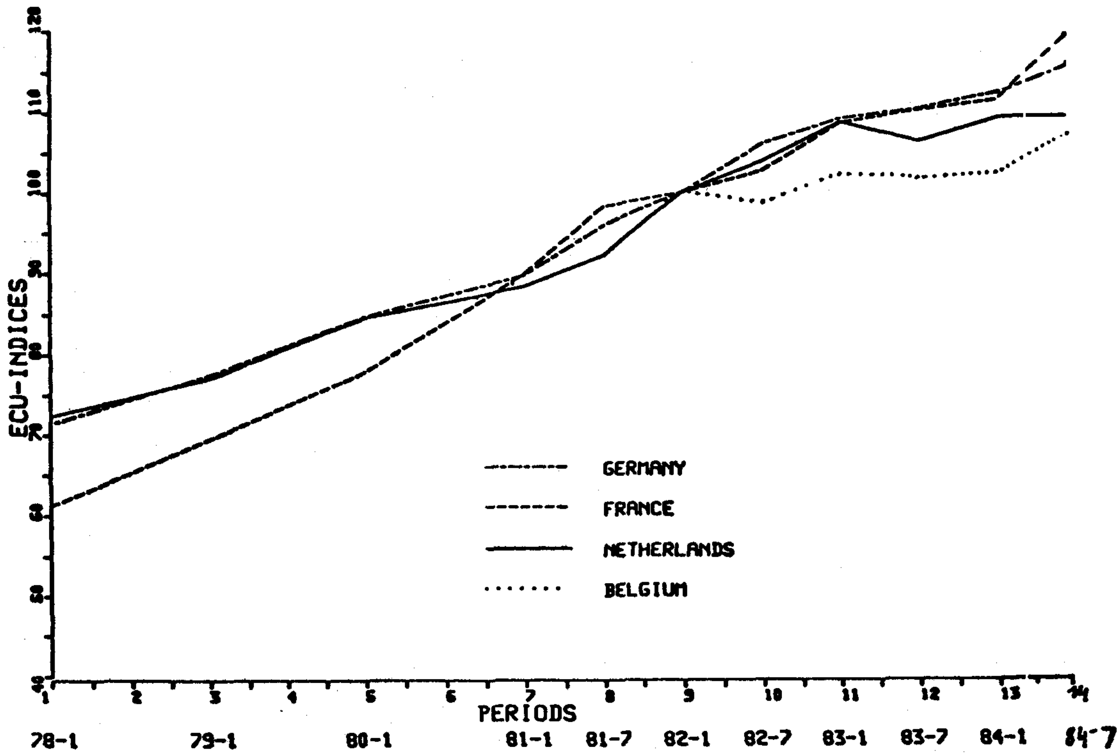


Figure 2.4.

FUEL COSTS IN ECU

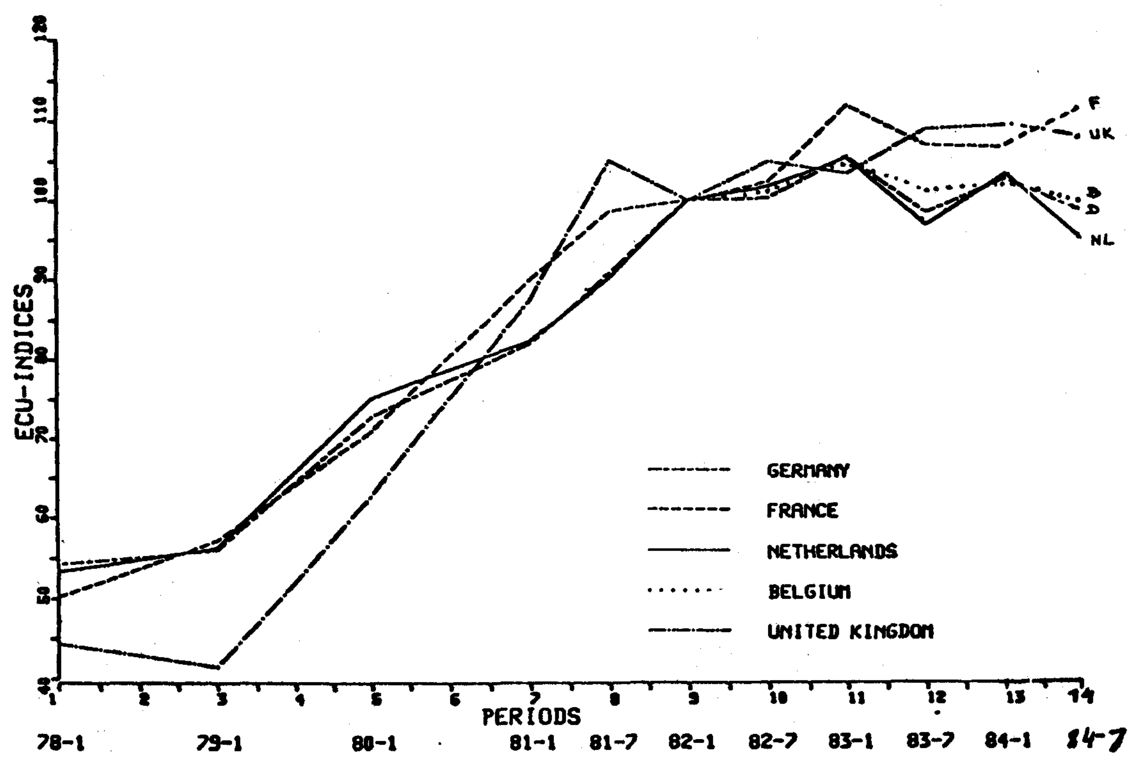


Figure 2.5.

FUEL COSTS IN NATIONAL CURRENCY

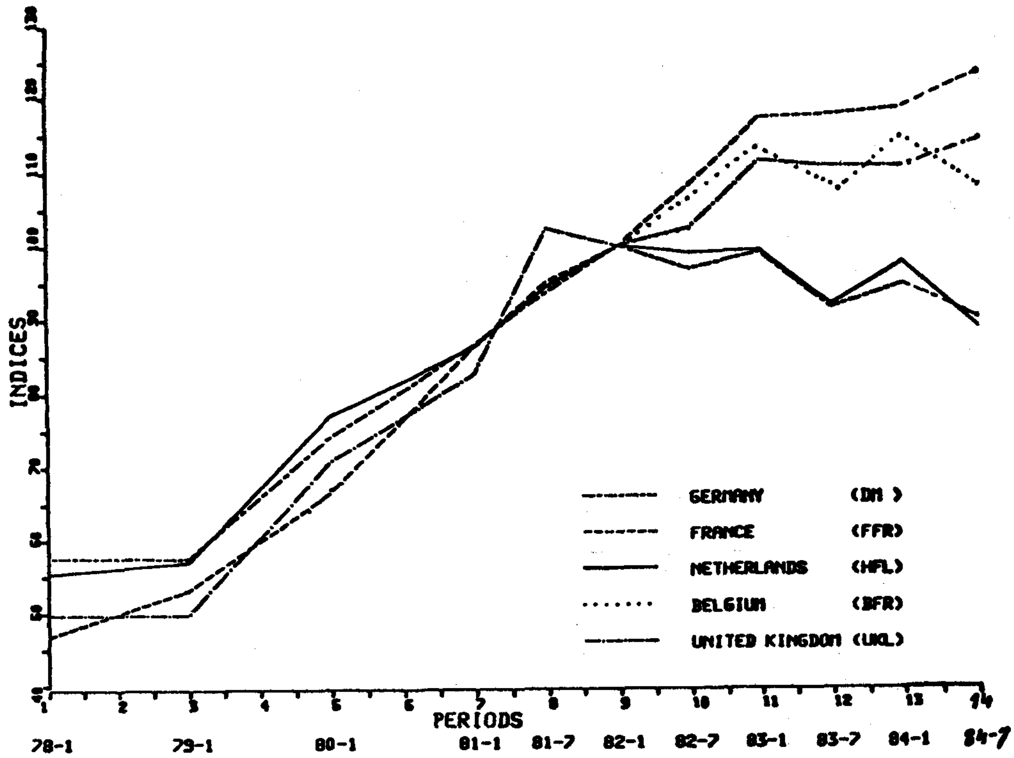
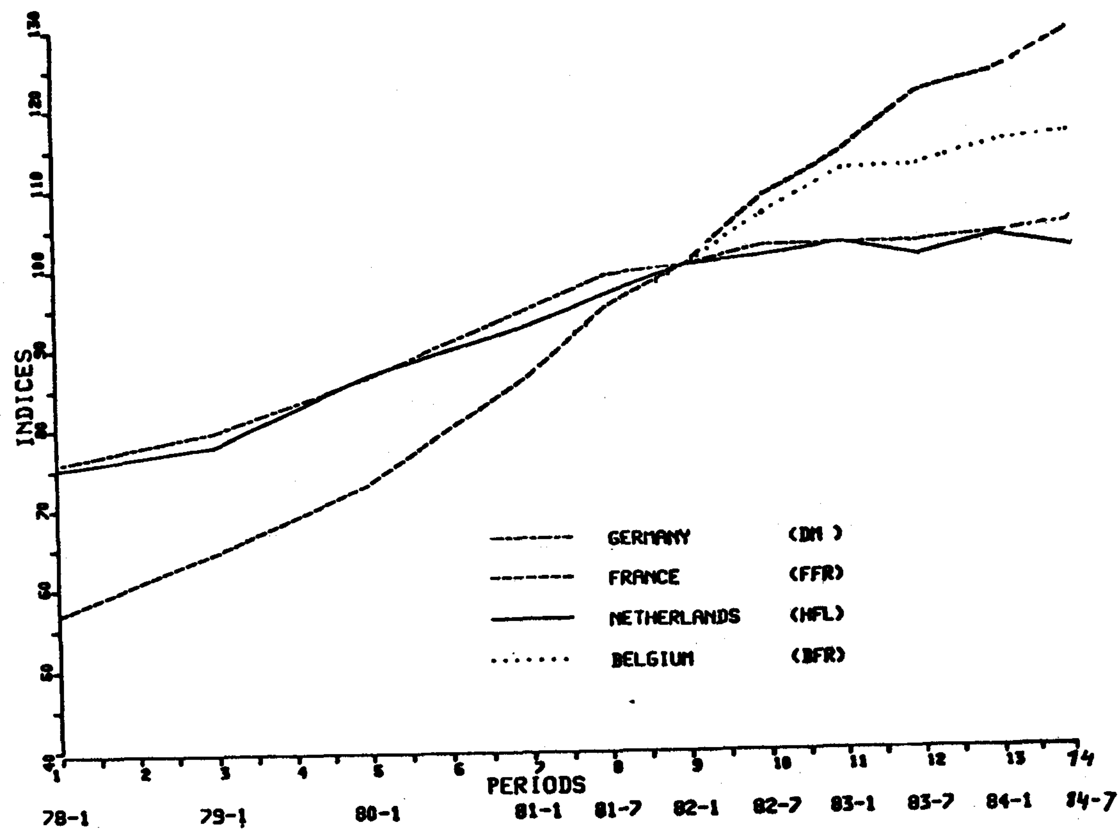


Figure 2.6.

TOTAL COSTS IN NATIONAL CURRENCY



2.3. Price Surveys

2.3.1. Coverage

Price surveys are being carried out in Germany, France, Italy, the Netherlands Belgium/Luxembourg and Greece. The analysis relates to movements between these Member States up to the second 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. The evolution is monitored by comparing the results of a quarter with the previous quarter.

2.3.3. Overall results by nationality of haulier

Overall average prices (measured in national currencies) have increased more in Greece (2.9%) and in France (2.2%) than in the Netherlands (+0.8%) and in Germany (+0.2%). Italy and Belgium/Luxembourg are the only countries where overall average prices decreased, respectively -3.5% and -0.4%.
In ECU, overall average prices decreased in Italy (-3.5%) and in Greece (-1.0%).

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. No data are available from the Member States for the relations with Greece.

German hauliers

Average prices in ECU increased in relation with all other Member States, Belgium/Luxembourg excepted. These increases are very low.

French hauliers

Average prices in ECU increased in relation with all the Member States. The increase in relation with Germany (+5.1%) is rather high and is higher than the increase applied by the other Member States in relation with Germany.

Italian hauliers

In ECU, average prices increased only in relation with the Netherlands (+0.6%) and Belgium/Luxembourg (3.2%). In relation with Germany (-5.0%) and France (-4.3%) average prices decreased significantly.

Dutch hauliers

In ECU, average prices increased slightly in relation with Germany and France (both +1.4%). In relation with Italy, average prices decreased (-0.1%). Data for the relation with Belgium/Luxembourg have not yet been received. In relation with the Netherlands, average prices have increased for all the Member States.

Belgium/Luxembourg hauliers

In ECU, average prices increased very much in the relation with the Netherlands (+12.7%). In relation with Germany and France, average prices decreased significantly. For all the Member States, only the German average prices decreased in relation with Belgium/Luxembourg.

Greek hauliers

In ECU, average prices decreased significantly in relation with France (-6%) and with Italy (-3.4%).

Table 2.10.

Comparison Q2 84 - Q1 84

Relation with / Nation. of hauliers	IN ECU						WEIGHTED AVERAGES	
	D	F	I	NL	B/L	GR	In ECU	In nat. curr.
D	-	+ 1.0	+ 0.7	+ 0.4	- 0.1	N.A.	+ 0.6	+ 0.2
F	+ 5.1	-	+ 3.3	+ 1.8	+ 0.4	N.A.	+ 2.6	+ 2.2
I	- 5.0	- 4.3	-	+ 0.6	+ 3.2	N.A.	- 3.5	- 3.5
NL	+ 1.4	+ 1.4	- 0.1	-	N.A.	N.A.	+ 1.2	+ 0.8
B/L	- 4.0	- 4.7	+ 3.6	+12.7	-	N.A.	+ 0.2	- 0.4
GR	+ 1.4	- 6.0	- 3.4	+ 1.0	+ 3.0	-	- 1.0	+ 2.9

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

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

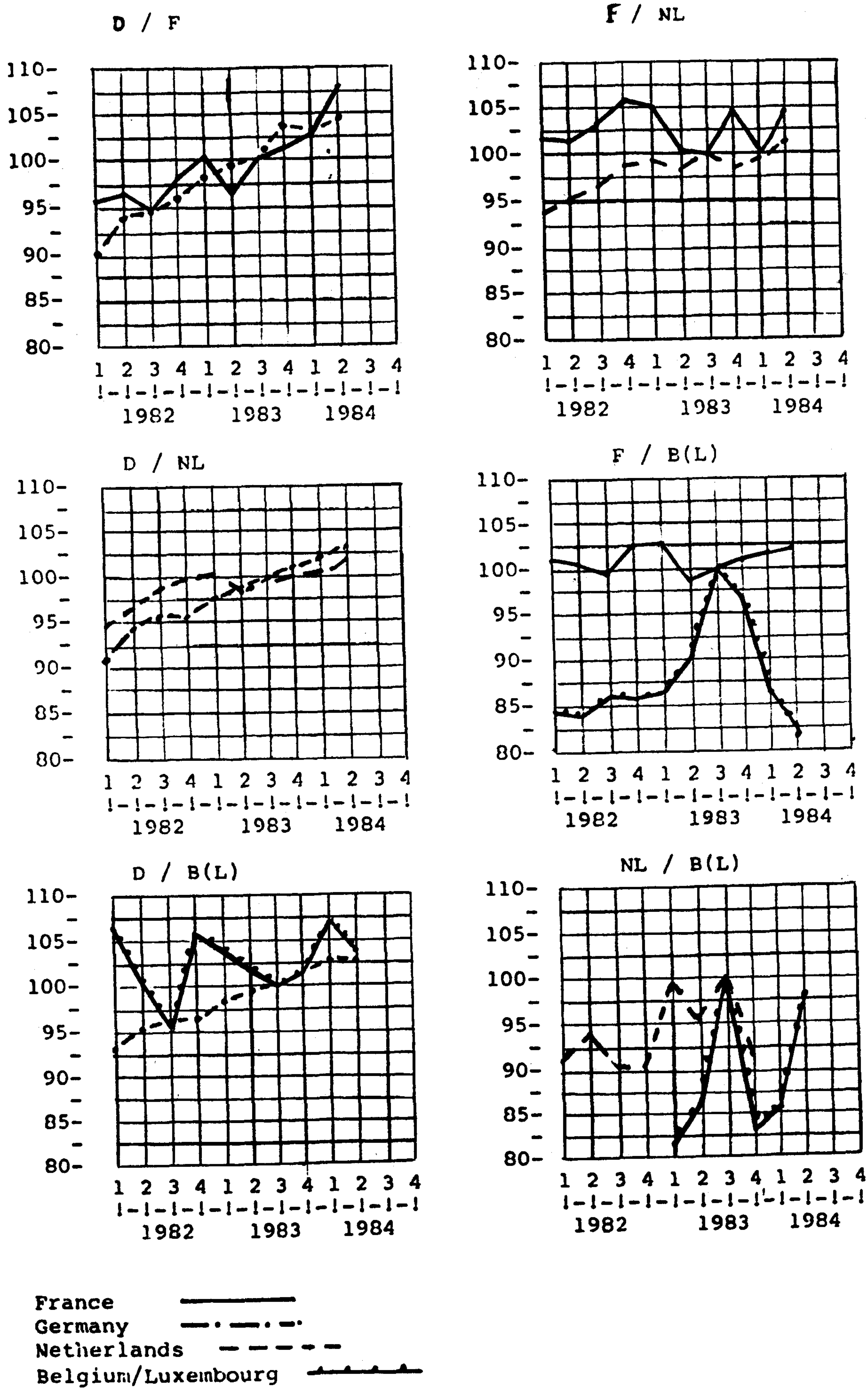
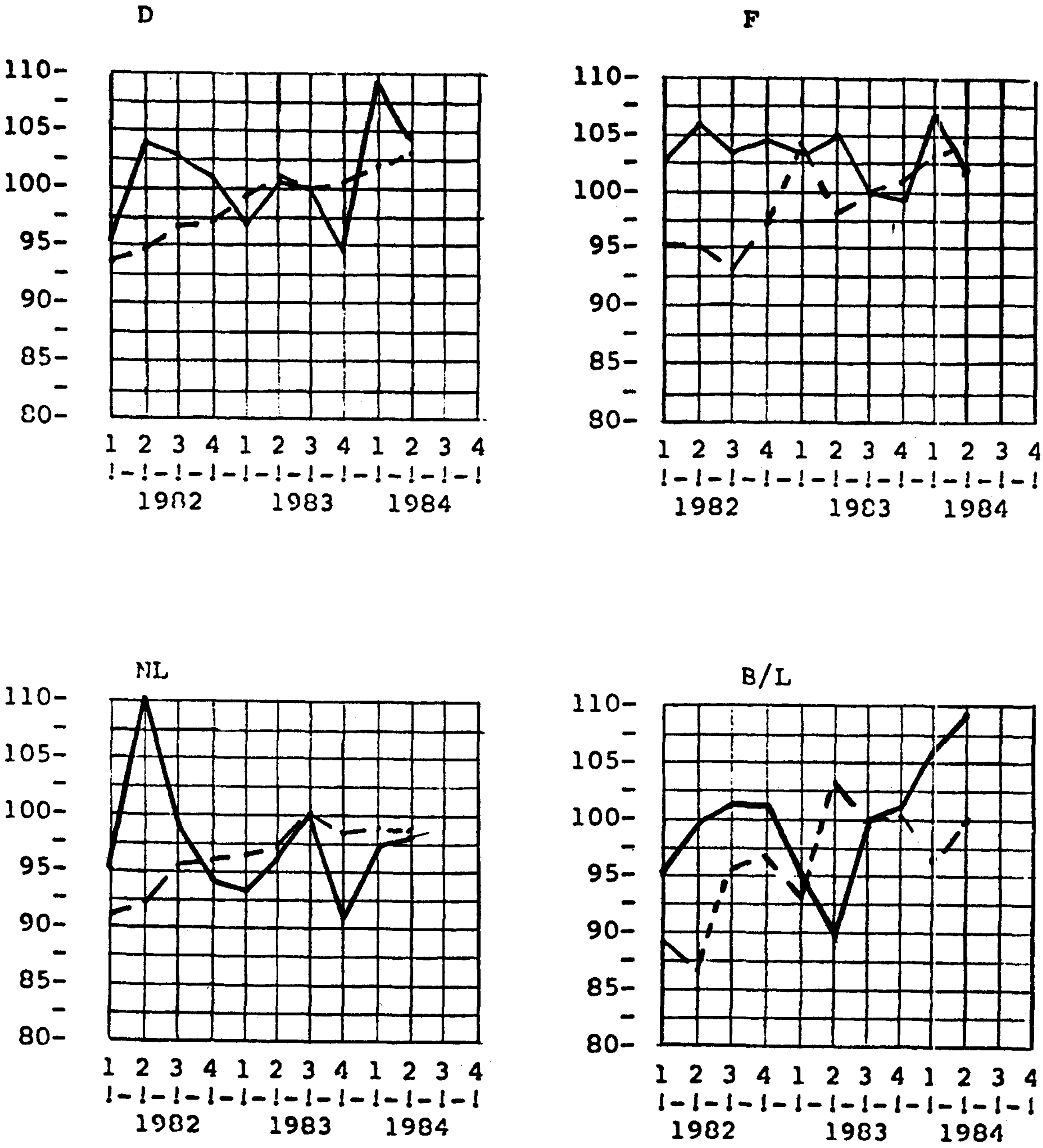


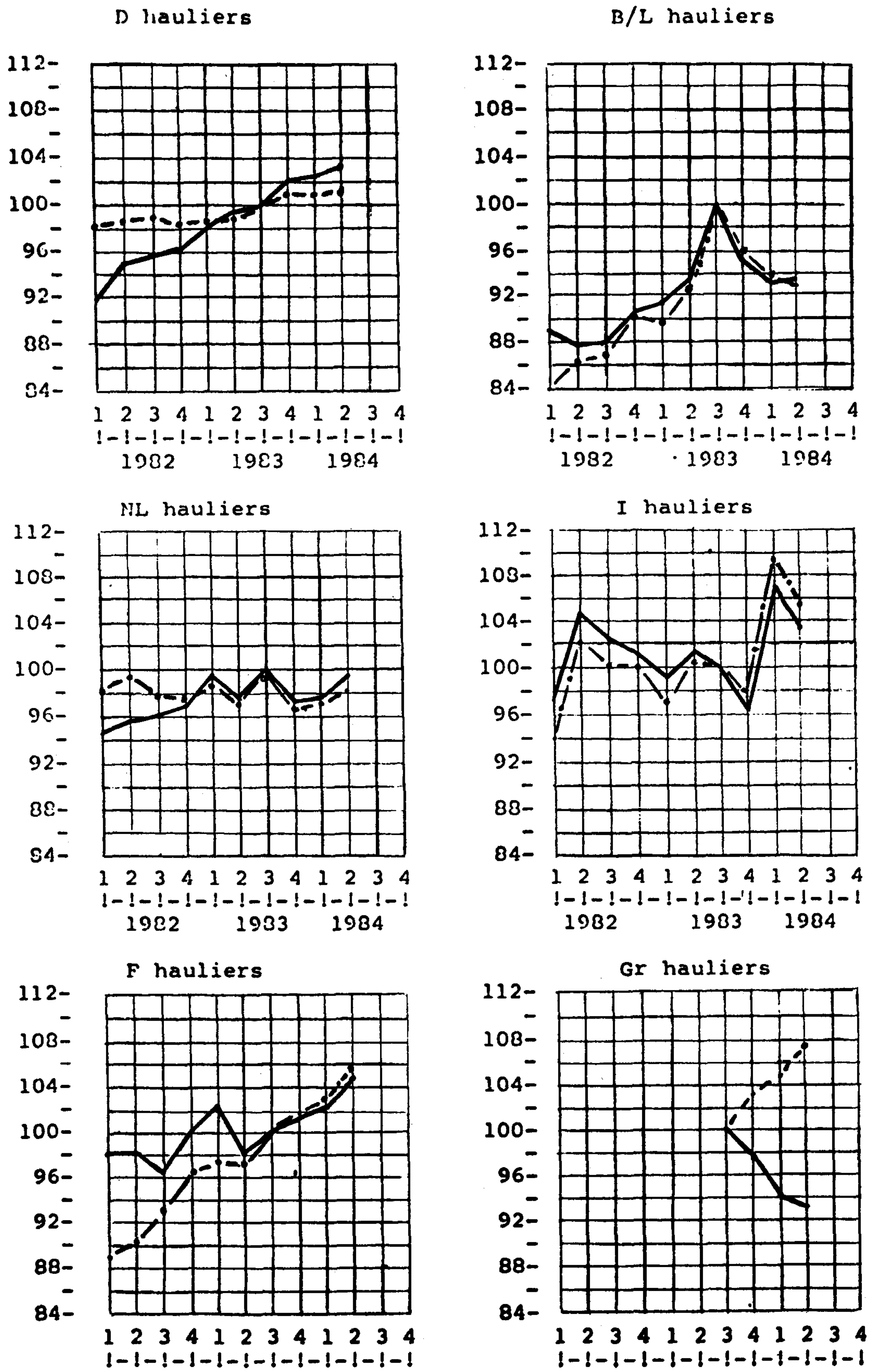
Figure 2.8.: Price Development in relations with Italy



———————— 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

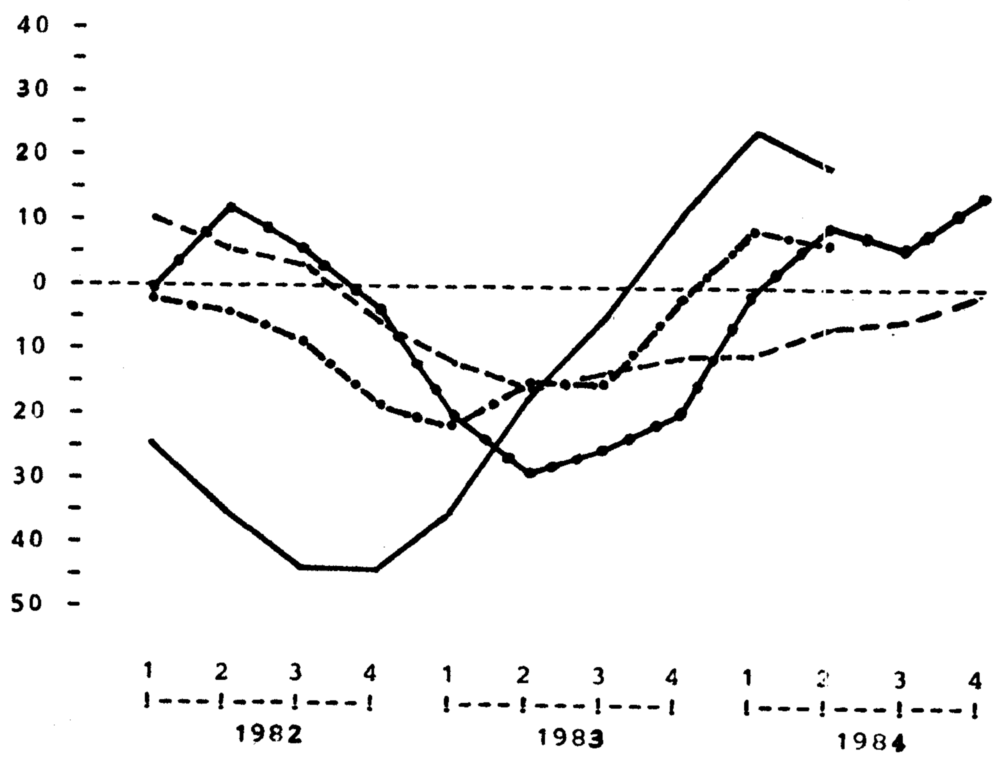
In the opinion of shippers participating in the survey a little decrease in the level of activity was noted during the second quarter 1984. Consequently, the moving average (calculated on the balance of opinion for the last four quarters) decreased slightly, but is still positive (figure 3.1.).

However, international Rhine traffic monitored at the Dutch-German border increased by 13.6% compared with the same quarter of last year.

36.8 mio tonnes passed Emmerich/Lobith which means an increase of 10.8% compared with the first quarter 1984. Upstream traffic increased by 10.4% (24.5 Mio Tonnes) and downstream traffic by 11.8% (12.3 Mio tonnes).

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

Aggregate balance of opinions (in percentage)



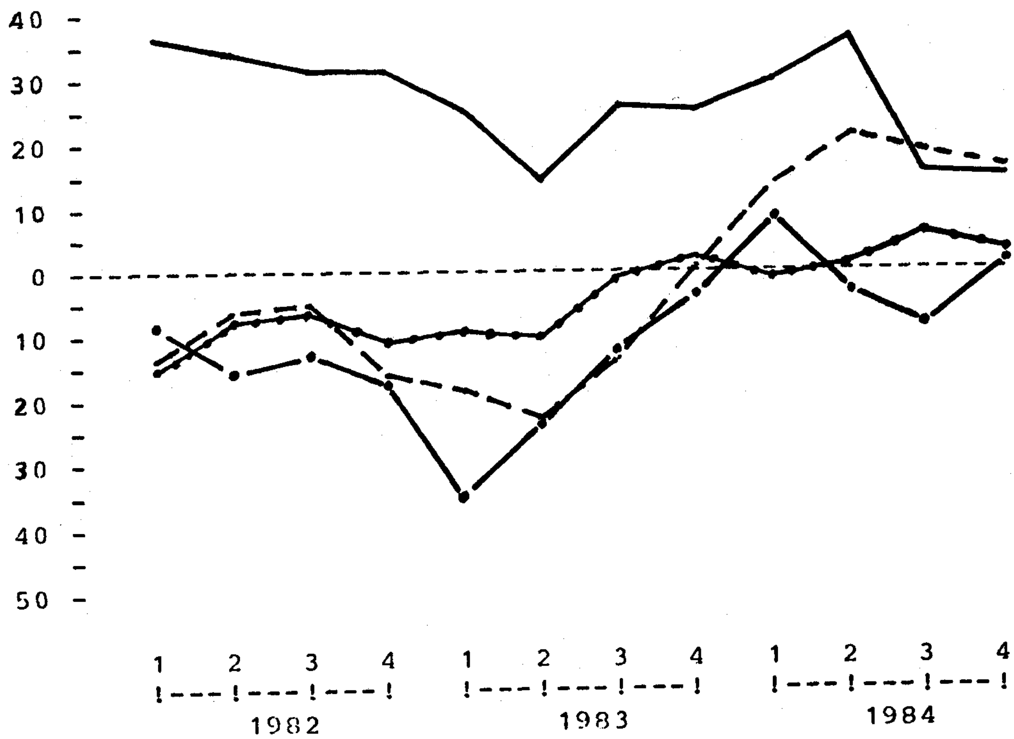
——— 4 quarter moving average actual activity
•—•—•— 4 quarter moving average forecast activity
•—•—• 4 quarter moving average actual utilisation of capacity
— — — 4 quarter moving average forecast utilisation of capacity

3.1.2. Forecasts

Activity is expected to rise during the fourth quarter of 1984. Forecast of utilisation of capacity is rising slightly, but is still considered to be at too low a level. Overcapacity is therefore expected to remain.

By important 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 will increase for all NST-groups, NST5 (steel) and NST6 (sand/gravel) excepted. Compared with the forecasts of the same quarter of 1983, transport activity is better in 1984 for all NST-groups, NST2 and NST3 excepted.

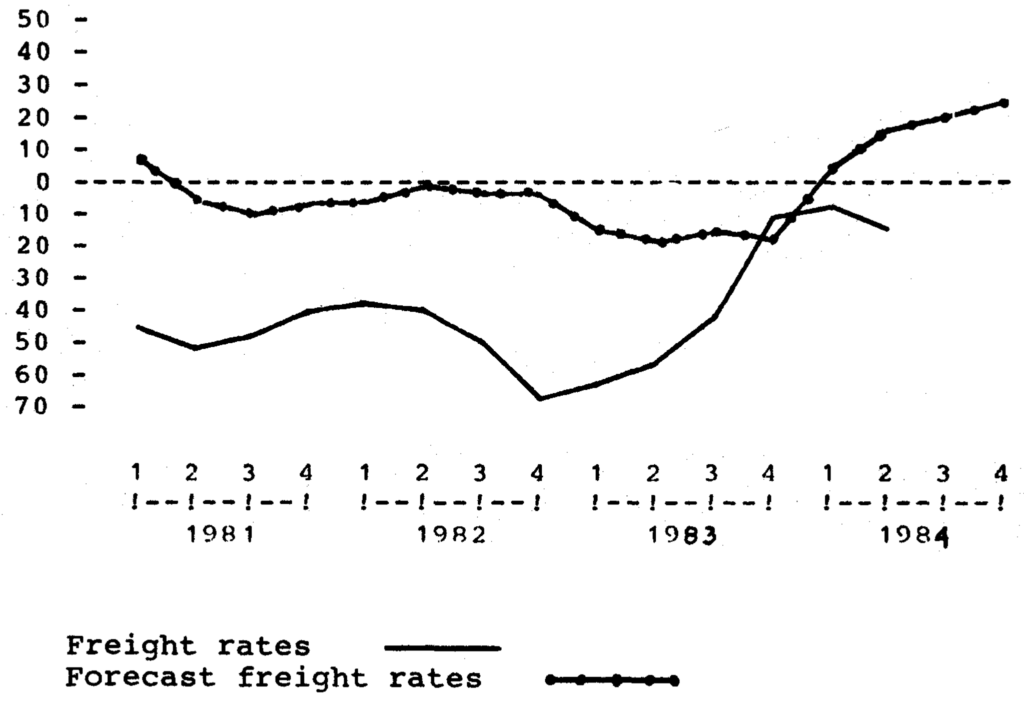
According to statistical evidence the second quarter 1984, compared with the first quarter of 1984, upstream transport of chemical products decreased by 45% and upstream transport of oil products increased by 19.5%; downstream transport of minerals and building materials increased by 35%.

3.1.3. Freight rates

Shippers report that rates decreased during the second quarter 1984. This confirms the earlier statement on continuing overcapacity. However, a further slight recovery of rates is forecasted for the fourth 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 third quarter 1984 on the North-South links show a decrease compared to the first and second quarter 1984.

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	-43	

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. As was stated in quarterly report N° 13, the second quarter 1983 was the first quarter during which an upward movement was noted. This positive trend still continues, but is getting weaker.

Although no survey is carried out in France, the statistical data available indicate that transport activity through North-South links, measured in tonnes, decreased by 9.1% for French exports, and increased by 14.8% for imports compared to the same quarter of last year. In the overall situation, an increase of 12.3% was noted.
Because of a strike of French owner/operators in July, transport activity was very low during that month, but good results in August and September more than compensated that low turn-out.

The weakening trend is largely confirmed by the change in the balance of opinions on the various bilateral relations, the third 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, Q3 1984 over Q3 1983 by bilateral relation.

From \ To	B	F	NL
B	-12	+ 3	+ 9
F	-18	-	+ 3
NL	-13	- 2	-10

However, French statistics indicate the following: French traffic to Belgium increased by 25% while traffic to the Netherlands decreased by 14%. French ingoing traffic from Belgium decreased by 1% and traffic from the Netherlands increased by 12%. French domestic traffic increased by 7.3%.

Table 3.2.: Changes in activity assessment by Dutch and Belgian shippers Q3 84 over Q3 83 by tonnage class.

Tonnage class	Belgian shippers	Dutch shippers	Total
200- 450	- 24	+ 5	- 9
451- 750	+ 22	- 17	+ 14
751-1150	+ 26	- 32	+ 6
1151-1550	+ 4	- 19	- 1
1551	- 4	- 32	- 22

The feeling of the Dutch owner/operators was that the situation on the market deteriorated, while the Belgian owner/operators felt in general more positive. 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.

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	9.5	
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	22.8	
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	8.5	

The number of waiting days increased to or even above the level of the same quarter last year in the Netherlands and France. In Belgium the waiting days decreased but remain at a level above the one of last year. In France the number of waiting days was particularly high during the strike of owner/operators in July (27 days) and decreased to 16 in September.

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

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

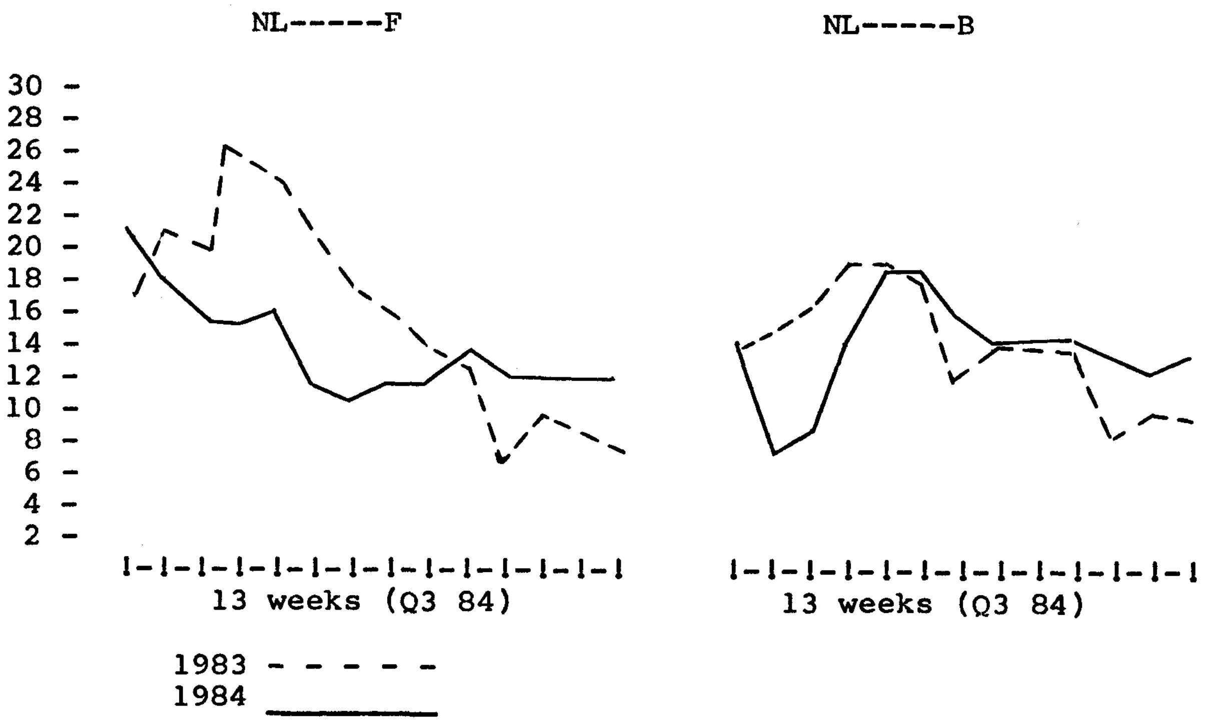


Figure 3.5.: Weekly average of waiting days in North-South traffic, from Belgium to France, including Belgian domestic traffic, and from Belgium to The Netherlands (bourse of Antwerp), third quarter.

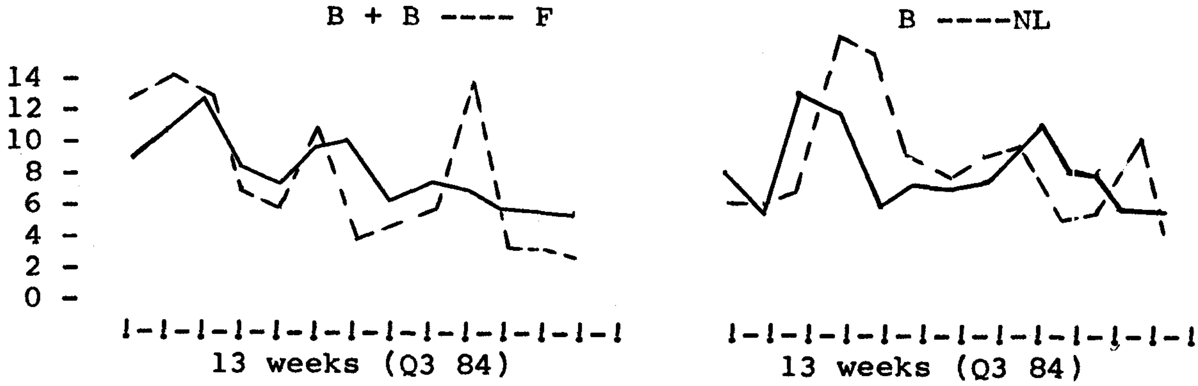
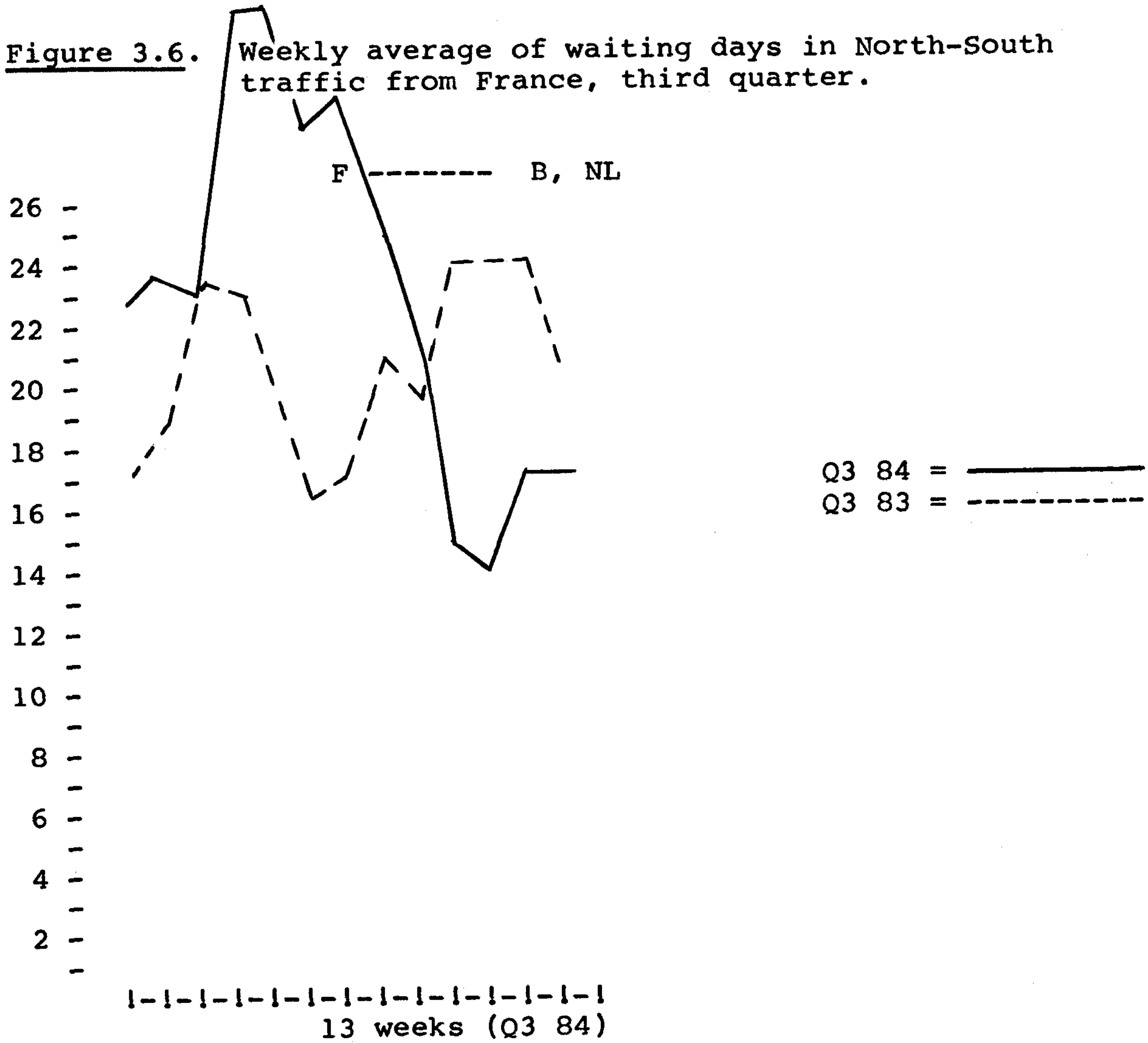


Figure 3.6. Weekly average of waiting days in North-South traffic from France, third quarter.



The general picture from these figures is the following:

The number of waiting days remains at a very high level. The improvement in market conditions is offset by the overcapacity.

3.2.3. Prices

More than 20% of the Dutch and Belgian shippers were of the opinion that freight rates were going down during the third quarter compared to the previous quarter. The balance of opinion of Belgian and Dutch transporters was negative, indicating an average freight level lower than the previous quarter and than the same quarter last year.

3.2.4. Forecasts : Some improvements of a seasonal nature.

Forecasts by Belgian and Dutch inland waterway transporters for the fourth quarter 1984 compared with the third quarter are less pessimistic. Dutch transporters are much more pessimistic. Related to the fourth quarter 1983 a reversal of the improving trend of the market is expected.

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

Quarter/ Country	1982		1983				1984			
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
B	-33	-40	-64	-52	-49	+32	-50	-47	-32	+ 4
NL	-48	-6	-31	-24	-18	+21	-20	+23	-68	- 1
Total	-43	-17	-42	-33	-28	+28	-32	-6	-24	+ 2

However, waterway transporters in Belgium expect positive developments on freight rates compared with the previous quarter. Dutch transporters are also optimistic as far as freight rates are concerned, because of expected low waterlevel on the Rhine.

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

Quarter/ Country	1982		1983				1984			
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
B	-8	0	0	-6	-6	+21	-3	-11	-16	+29
NL	-8	0	-10	-12	-13	+35	-35	+19	-6	+20
Total	-43	-17	-42	-33	-28	+28	-32	+6	-10	+25

3.3. Cost Indices

Cost indices for international inland waterway transport were published for the first time in Quarterly Report no. 10.

3.3.1. Overall cost developments

Table 3.6. : Overall cost indices and cost indices by market on 1.1.1984 and 1.7.1984 in ECU (1.1.1982 = 100)

	Overall		Rhine		N-S	
	1.1.84	1.7.84	1.1.84	1.7.84	1.1.84	1.7.84
Wages	112.5	116.2	114.7	118.2	108.9	113.2
Capital	95.5	98.3	97.6	100.6	92.1	94.9
Fuel	108.2	106.9	108.3	108.0	107.9	105.2
Other costs	106.9	108.8	109.5	111.4	102.8	104.8
Total costs	106.2	108.9	107.9	110.4	103.6	106.5

Total costs went up in the first half of 1984 by 2.5%, which is a low figure given the average inflation in the relevant Member States. Capital costs and wages went up further by 3.5% and 3.3% respectively, but fuel costs decreased with about 1%.

In Rhine shipping overall costs increased less in the first half of 1984 than on the North-South market (+ 2.3% against 2.8%). The cost increase in Rhine shipping since 1.1.1982 has been 10%, while on the North-South costs increased by 6.5% in particular because of wage increases.

3.3.2. Cost developments by shiptype

Table 3.7. : Cost indices by ship type on 1.1.1984 and 1.7.1984 in ECU (1.1.1982 = 100)

	350 t.		600 t.		1200 t.		pusher units	
	1.1.84	1.7.84	1.1.84	1.7.84	1.1.84	1.7.84	1.1.84	1.7.84
Wages	108.9	113.6	108.1	112.1	113.4	117.0	115.8	118.4
Capital	91.6	94.3	92.9	95.5	96.6	99.5	97.4	101.1
Fuel	108.0	106.7	107.6	103.2	108.5	107.3	106.4	106.3
Other costs	102.7	105.0	103.9	105.7	108.0	109.8	110.4	112.1
Total costs	104.5	107.9	103.6	106.4	106.7	109.1	107.8	110.2

For the first half of 1984, costs increased more for the smaller type of vessels than for the bigger ones and pusher units (+ 3.2%, 2.7%, 2.2% and 1.0% respectively).

3.3.3. Cost developments by flag

Table 3.8. : Total cost indices by nationality of the vessel on 1.1.1984 and 1.7.1984 in national currency (1.1.1982 = 100).

	B (FR)		D (DM)		F (FF)		NL (HFL)	
	1.1.84	1.7.84	1.1.84	1.7.84	1.1.84	1.7.84	1.1.84	1.7.84
Overall	106.7	109.5	104.5	106.6	115.9	118.9	102.1	103.0
Rhine	105.4	106.9	104.5	106.6	112.1	115.1	101.3	102.6
N-S	107.0	110.0			118.4	121.4	103.7	104.4

The overall cost indices in national currency by nationality of the vessel increased in the first half of 1984, in particular for France and Belgium (3.8 %). In the Netherlands cost increases were small (0.9 %). The explanatory factor seems to be the different inflation rate in the various countries.

SECTION 4

RAIL SURVEYS

4.1. Rail activity

Table 4.1.: EUR-10 tonnage evolution (in percentages) Q2 84/Q2 83 by transport relation (1)

From \ To	D	F	I	NL	B+L	UK	IRL	DK	GR	EUR 10
D	-	- 1	+ 14	- 5	+ 22	- 36	-	- 5	N.C.	+ 7.3
F	+ 2	-	+ 28	- 30	- 2	+ 27	-	+ 21	+ 50	+ 9.9
I	+ 7	- 11	-	- 9	+ 57	+ 7	-	+ 23	+ 9	+ 5.4
NL	- 16	+ 8	+ 15	-	+ 38	- 50	-	+ 90	- 42	- 1.4
B+L	- 1	+ 10	+ 32	+ 12	-	- 5	-	+ 44	N.C.	+ 9.8
UK	+ 75	- 10	+ 30	- 39	+ 86	-	-	N.A.	N.A.	+35.3
IRL	-	-	-	-	-	-	-	-	-	-
DK	- 31	- 5	+ 63	+ 40	+ 11	N.A.	-	-	N.A.	-22.1
GR	- 82	N.C.	- 84	- 41	N.C.	N.A.	-	N.A.	-	-78.6
EUR 10	- 4.2	+ 2.4	+23.2	- 1.0	+12.4	+ 1.3	-	+ 3.6	+ 8.9	+ 7.2

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

International intra EUR-10 rail transport of goods increased by 7.2% in the second quarter of 1984 compared to the same quarter of the previous year.

This average increase varied considerably according to the Member State concerned. For example, outward traffic from Germany increased by +7.3% and inward traffic to Germany decreased by -4.2%.

On traffic flows of major tonnage, increase of inward traffic to Italy was particularly noticeable.

(1) Excluding B-L and L-B.

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

France-Belgium

31.12.81	30.6.83	30.9.83	31.12.83	31.3.84	30.6.84	30.9.84
100	115.33	117.71	125.21	126.56	126.56	129.04

For the 9 representative commodities of this relation, the evolution of price indices varies considerably for both carriers. For SNCF it is between 26-35% and for SNCB it is between 19-42% (since the 31.12.81). Except for wheat and cereals for the two sectors, there was no change in the tariffs from the previous quarter.

France-Netherlands

31.12.81	30.6.83	30.9.83	31.12.83	31.3.84	30.6.84	30.9.84
100	113.56	119.90	121.64	122.16	122.16	125.63

Except for maize and animal fodder which show for the both sectors an average increase of 41% since 31.12.1981, for the other five of the seven representative commodities in the Netherlands sector, the price index has been about -2% and in the French sector about 20% from the base established on 31.12.81.

B) DB's Elaboration

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

Germany-France

31.12.81	30.6.83	30.9.83	31.12.83	31.3.84	30.6.84	30.9.84
100	113.98	113.98	115.68	118.96	118.96	118.96

Germany-Belgium

31.12.81	30.6.83	30.9.83	31.12.83	31.3.84	30.6.84	30.9.84
100	111.60	112.24	112.24	114.06	115.84	116.99

Germany-Netherlands

31.12.81	30.6.83	30.9.83	30.12.83	31.3.83	30.6.84	30.9.84
100	110.60	111.16	111.16	114.21	114.21	114.21

Germany-Luxembourg

31.12.81	31.12.83	31.3.84	30.6.84	30.9.84
100	109.02	111.44	111.44	111.14

C) SNCB's Elaboration

Belgium-France

31.12.81	31.12.83	31.3.84	30.6.84	30.9.84
100	125.05	125.84	125.84	127.95

Belgium-Netherlands

31.12.81	30.6.83	30.9.83	31.12.83	31.3.84	30.6.84	30.9.84
100	113.93	116.29	116.29	119.50	119.50	123.58

Except for containers, the evaluation of price indices was the same for the two sectors: 20% since 31.12.81.

Belgium-Germany

31.12.81	31.12.83	31.3.84	30.6.84	30.9.84
100	120.83	121.58	121.95	121.95

Belgium-Italy

31.12.81	30.6.83	30.9.83	31.12.83	31.3.84	30.6.84	30.9.84
100	123.60	124.92	129.28	130.98	130.98	132.60

For the 13 representative commodities of this relation, the evolution of price indices varies considerably for both carriers. For SNCB it is between 19-45% and for FS it is between 39-60% (since the 31.12.1981).

SECTION 5

COMBINED TRANSPORT

5.1. Container traffic

Traffic of rail containers in the third quarter of 1984 was at a level 11% higher than in the third quarter of 1983. despite the usual summer seasonal influences, the third quarter was only 2.5% below the level of the second quarter of 1984 and first indications for october show a continuing strong trend. Since January, total traffic (9 months) is 9% over 1983 (9 months).

Intercontainer now expects to complete 1984 with around 825,000 TEU (1983: 761,000 TEU, 1982: 719,000 TEU). The principal growth areas have been, in traffic to and from the container ports: Austria/ports in the F.R.G., Austria/Italian Ports, Italy/Netherlands and Belgian ports, and France/Belgian ports. These flows all reflect the increasing demand for transport services in the containerised cargo flows between Europe and overseas, especially with the U.S.A.

Inner-European, continental, containerised movements have also increased strongly with a 22% rise up to the end of september compared to the first nine months of 1983 for loaded containers. Empty containers remained at the 1983 level. Principal traffic flows have concerned France/Italy, Italy/Fed. Republic of Germany and Scandinavia/Belgium.

Container traffic by rail in connection with the Transsiberian route, normally around 20,000 TEU per year, has increased by 15% this year following introduction of regular scheduled train-load working, especially for traffic to China.

Overall in Europe the level of demand for rail container services is strong. Average rail rate levels have not increased significantly this year.

The outlook is still favourable, but there are signs of a slowing down of international trade with some overseas areas (especially the U.S.A.). New rail opportunities are arising by virtue of the present trend in container shipping towards concentration on certain key ports in the Community, to be served on land by full-train services. We expect this trend to continue.

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 second quarter of 1984, compared to the first quarter of 1984, shows a decrease of -5% in the overall growth rate.

5.2.1. International traffic by companies based in the Community

Country of despatch		Units despatched Q2/84	% change from Q1/84	% change from Q2/83
Kombiverkehr	D	17446	- 2	25
Novatrans	F	2087	-12	- 7
	I(except to D)	5191	- 1	31
	UK	1505		66
FERPAC	I (to D)	2940	- 5	26
Trailstar	NL	1153	-39	-28
TRW	B	3649	-10	15
Total		33971	- 5	20

While there were some exceptions in different relations, total traffic figures for all the companies were negative in the second quarter of 1984 compared to first half of 1984.

Kombiverkehr in this quarter achieved a 51% 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 2629. Novatrans, trading in France in total traffic has a considerable decrease of -12% due mostly to the F/I relation.

Trailstar in total traffic has the negative figure of -39% due mostly to the NL-I relations. TRW figures registered negative figures for relations via France and positive figures for relations via Germany.

5.2.2. Important intra-Community relations (over 850 units in Q2/84)

Relation	Units despatched Q2/84	% change from	
		Q1/84	Q2/83
D ------ I	8536	- 8	38
F ------ I	1218	-19	-13
I ------ F	1266	-15	- 8
I ------ UK	1675	11	42
I ------ D	2940	- 5	26
UK ------ I	1468	- 2	65
I ------ B	2250		57
N ------ I	891	-41	-31
B ------ I	2344	- 9	27
Total	22588		

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) 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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