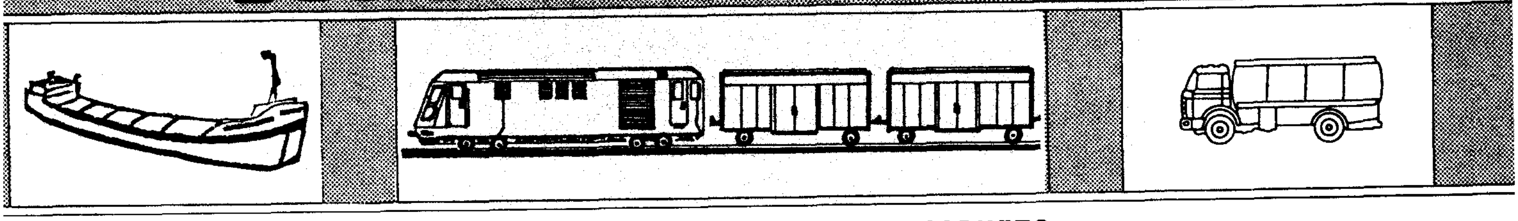
EUROPEAN COMMUNITIES

EUROPA TRANSPORT



OBSERVATION OF THE TRANSPORT MARKETS

MARKET DEVELOPMENTS

12

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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 (Q4 83) and combined transport (Q4 83 or Q1 84)
- the results of quarterly opinion surveys carried out among international road hauliers (Q1 84)
- the results of six-monthly cost surveys carried out among international road hauliers (1.1.84)
- the results of quarterly price surveys carried out among international road hauliers (Q4 83)
- the results of quarterly opinion surveys among inland waterway operators on two international networks, i.e. the Rhine (Q4 83) and the North/South (Q1 84) (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 (1.1.84)
- the results of quarterly price indices for international rail movements (Q1 84).

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

SUMMARY

	ITEM	EVOLUTION		CHAPTER
3 MODES	EUR-7 tot. tonnage	↗	+ 8.9% Q4 83/Q4 82	table 1.1
RAIL +ROAD +I.W.	" " "	↗	+ 3.0% 1983/1982	" 1.3
ROAD	EUR-7 tonnage	↗	+ 9.3% Q4 83/Q4 82	table 1.1
	" "	↗	+ 5.6% 1983/1982	" 1.3
	Modal share	↗	+ 0.2% Q4 83/Q4 82	" 1.2
	" "	↗	+ 0.8% 1983/1982	" 1.4
	Costs nat. currency	↗	Max. + 4.4% (B)	" 2.8
			Min. + 0.3% (UK)	" 2.8
	Prices nat. curr.	↗	+2.3% (F) +1.8%(GR)	chap.2.3.3
		↘	-3.0% (I) -1.1%(NL)	" 2.3.3
	EUR-10 traf. matrix		Q4 83/Q4 82 by relat.	table 2.0
INLAND WATER-WAYS	EUR-5 tonnage	↗	+8.4% Q4 83/Q4 82	table 1.1
	" "	↗	+3.4% 1983/1982	" 1.3
	Modal share	↘	-0.2% Q4 83/Q4 82	" 1.2
	" "	↗	+0.6% 1983/1982	" 1.4
	EUR-5 traf. matrix		ton. Q4 83 by relat.	" 3.0
RAIL	EUR-7 tonnage	↗	+9.1% Q4 83/Q4 82	table 1.1
	" "	↘	-5.2% 1983/1982	" 1.3
	Modal share	→	- % Q4 83/Q4 82	" 1.2
	" "	↘	-1.4% 1983/1982	" 1.4
	EUR-7 traf. matrix		ton. Q4 83 by relat.	" 4.2

N.B. : Q4 83/Q4 82 = fourth quarter of 1983 compared to the fourth quarter of 1984.

SECTION 1

GENERAL MARKET ASSESSMENT - ALL MODES

Road - Rail - Inland Waterways

Fourth quarter 1983

The total tonnage for all three modes in the fourth quarter 1983 (Q4 83) was up 8,9% on the same quarter of the previous year (Q4 82).

Table 1.1. : International EUR-7 (1) traffic in million tonnes (2)

Mode	Mio Tonnes Q4 83	Mio Tonnes Q4 82	% change Q4 83/Q4 82
Route Rail I.W.	43.4 16.2 46.5	39.7 14.9 42.9	+ 9.3 + 9.1 + 8.4
Total EUR-7	106.1	97.4	+ 8.9%

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

Particularly noticeable is the marked recovery of Rail transport, which has recorded for the first time for some years, a significant positive improvement.

Table 1.2. : Modal split

Mode	Mio Tonnes Q4 83	Modal Split in % Q4 83	Q4 82	Change Q4 83/Q4 82
Road Rail I.W.	43.4 16.2 46.5	40,9 15,3 43,8	40,7 15,3 44,0	+ 0.2% - - 0.2%
Total EUR-7	106.1	100%	100%	-

Remarkable stability in the modal split Q4 83 compared to Q4 82

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

| 1983 Total year | (1)

Total tonnage transported in 1983 for the three modes together was up 3% on 1982.

Table 1.3. : International EUR-7 traffic (Mio. Tonnes)

Mode	Mio. Tonnes 1983	Mio. Tonnes 1982	% change 1983/1982
Road	163.7	155.0	+ 5.6
Rail	56.3	59.4	- 5.2
I.W.	182.2	176.2	+ 3.4
Total EUR-7	402.2	390.6	+ 3.0%

There was a positive balance for 1983, with Road transport showing a good improvement (+ 5.6%) and Inland Waterways also up, but to a lesser extent.

Globally, 1983 was negative for Rail transport which did, however, show a significant recovery in the second half of the year.

Table 1.4. : Modal split : Total year 1983

Mode	Mio. Tonnes 1983	Modal Split in % 1983	1982	Change 1983/1982
Road	163.7	40.7	39.9	+ 0.8%
Rail	56.3	14.0	15.4	- 1.4%
I.W.	182.2	45.3	44.7	+ 0.6%
Total EUR-7	402.2	100%	100%	-

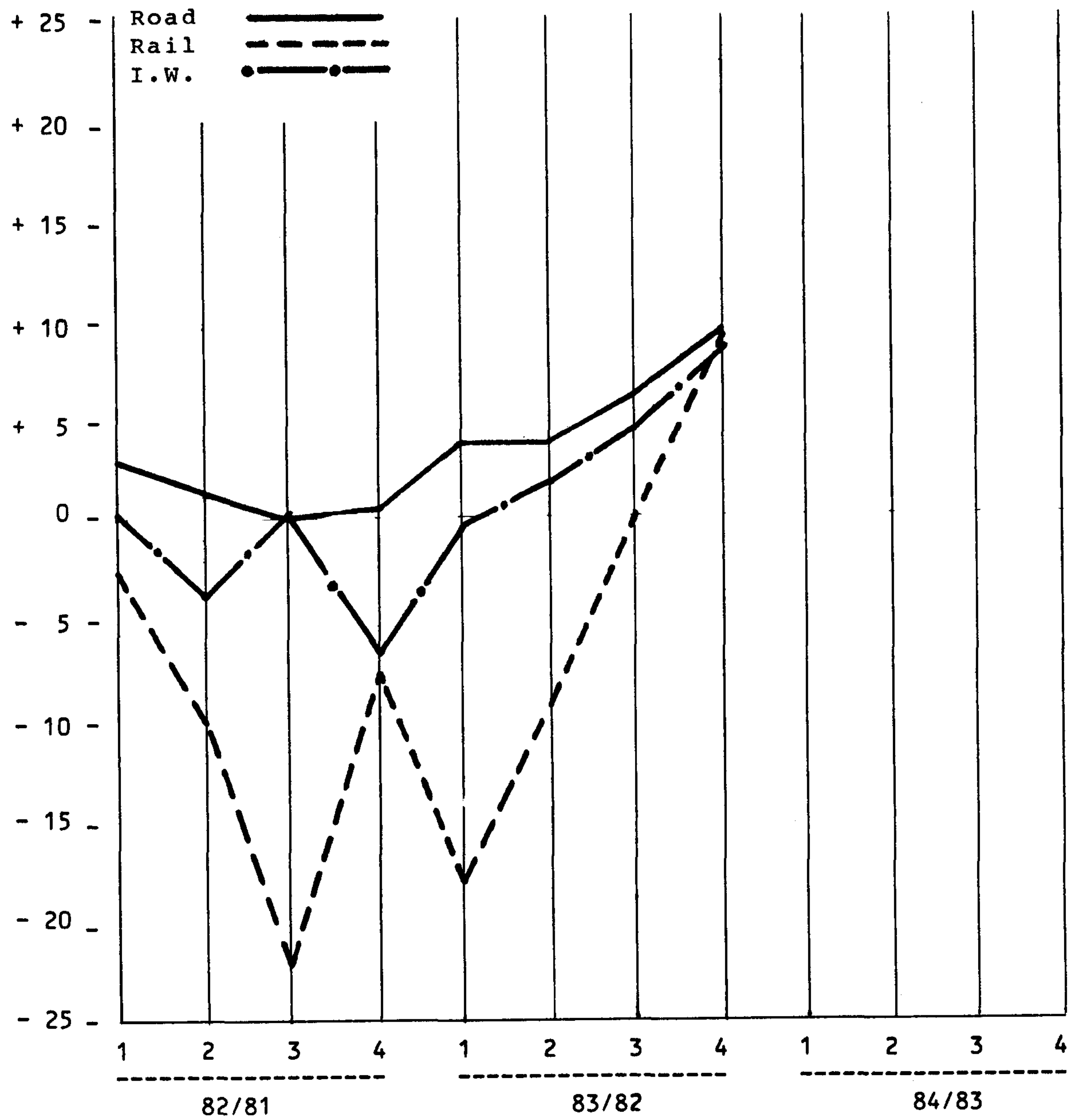
Road increased its market share more rapidly than inland waterways to the detriment of rail.

(1) These initial estimates may be revised in the "Annual Report" 1983.

Table 1.5. : Traffic evolution by mode
(% difference between one quarter and the corresponding quarter of the previous year).

Year Mode	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	Q4 83 Q4 82
Road	+ 2.9	+ 1.3	0.0	+ 0.4	+ 3.6	+ 3.6	+ 5.9	+ 9.3
Rail	- 2.7	-10.2	-21.9	- 7.8	-18.3	- 9.4	- 0.1	+ 9.1
I.W.	+ 0.1	- 3.9	+ 0.1	- 6.7	- 0.5	+ 1.6	+ 4.2	+ 8.4
Total	+ 0.6	- 3.0	- 3.1	- 4.1	- 1.7	+ 0.7	+ 4.2	+ 8.9

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



2)

1.6. United Kingdom, Ireland and Greece

1.6.1. United Kingdom Q4 1983

In the fourth quarter of 1983, total traffic was largely unchanged from quarter 3. UK powered vehicles were 5 per cent lower and foreign ones 5 per cent higher. Most of the increase came in French vehicles, and traffic was noticeably higher (up 14 per cent) on the English Channel (ports on south coast, west of Folkestone).

Relative to the 4th quarter of 1982, traffic was 7 per cent higher. The changes follow much the same pattern as seen for the year as a whole, with the exception of the 4th quarter 1983 being particularly good for English Channel routes.

1.6.2. Ireland Q1 1984

Q1 84 was a generally quiet quarter. Apart from seasonal factors, which normally reduce the refrigerated market, general traffic appears to have been quieter than expected.

The international haulage market to and from Ireland was adversely affected during the quarter by unfavourable weather conditions, which disrupted ferry schedules, by a blockade of ports by French farmers in early February, and by the general blockade in France, in late February. Almost 90% of the firms interviewed reported no change in the volume of EEC multilateral activity during the first quarter of the year.

1.6.3. Greece Q4 1983

Total traffic by road in the fourth quarter of 1983 shows a slight decrease on the same quarter of the previous year.

Despite a + 0.9% increase in imports, total traffic suffered a significant drop in exports, especially to Germany (- 5.7%) which is the main transport relation and to the Netherlands.

SECTION 2

ROAD

Table 2.0. EUR-10 tonnage evolution (in percentage) Q4 83/Q4 by transportrelation.

From \ To	D	F	I	NL	B+L	UK	IRL	DK	GR
D	-	+8.3	+11.8	+ 8.8	+ 6.5	+16.5	+10.0	+11.9	+ 1.2
F	+11.6	-	+ 5.8	+22.6	+ 4.0	+20.5	+15.4	+13.0	- 9.5
I	+20.5	+7.2	-	+11.0	+10.9	N.A.	+ 7.1	+25.8	- 1.4
NL	+12.4	+7.0	+11.0	-	+11.0	N.A.	- 7.8	+13.1	+11.4
B+L	+13.5	+1.1	+11.6	+11.0	-	N.A.	+40.9	+87.5	- 8.4
UK	+31.2	+5.7	N.A.	N.A.	N.A.	-	+16.6	+13.3	+ 6.4
IRL	+17.0	+3.9	+23.5	+13.2	+31.4	+11.7	-	+104.	-25.0
DK	+11.5	-1.4	+ 1.9	+33.9	+ 3.7	+ 6.8	+77.2	-	+12.5
GR	- 5.7	+1.3	+ 0.1	-15.7	+16.1	+ 7.8	-95.0	-41.9	-

N.A. = not available.

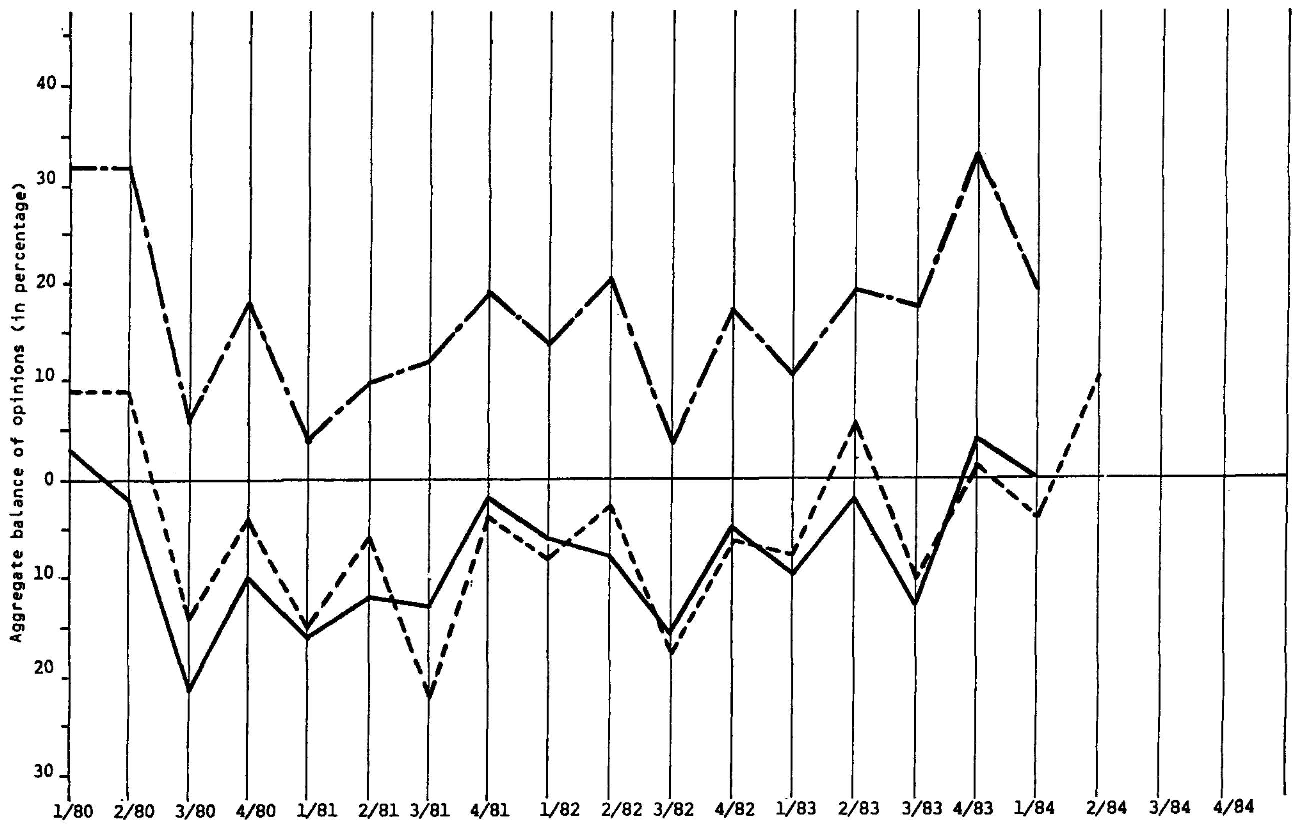
2.1. Road Inquiry Survey

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

Road Transport improves further

The inquiry for the first quarter of 1984 indicates a slight deterioration in the activity level of road transport, but this should be interpreted as a seasonal effect. Indeed, if compared to the first quarter of the previous year, it appears that an improvement of 6 percentage points has been realised (balance of opinions).

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



Utilisation of rolling stock
Activity forecast
Activity

2.1.2. Activity : Upwards swing continues, but strong seasonal influence

After the necessary corrections for seasonal influences it appears that the upward trend in activity, started in the last quarter of 1983, is continuing.

2.1.3. Forecasts

The expectations for the second quarter of 1984 show a further increase of 10% (measured by the balance of opinions). Those expectations reflect the improved economic situation. Compared to the activity in the second quarter of 1983, only Luxembourg and Greece expect a lower activity level.

2.1.4. Utilisation of rolling stock

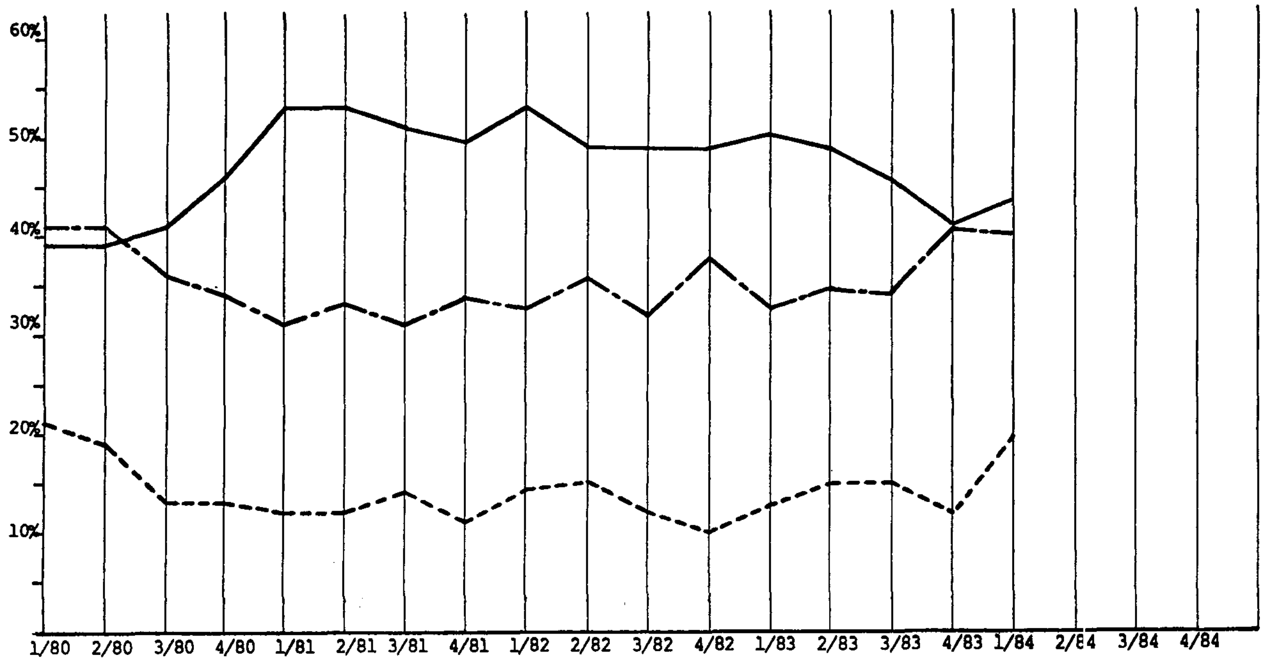
Compared to the last quarter of 1983, the use of rolling stock has decreased, as could be expected given the seasonal decline in transport activity during the first quarter of 1984.

However, compared to the first quarter of 1983 an important improvement has taken place (30 percentage points).

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

The most striking element is the increase (to 20%) in the number of firms which have recruited drivers. This indicates furthermore that the decline in activity during the first quarter is purely seasonal with an underlying rising trend.

Figure 2.2 Economic indicators



——— 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 percentage of firms having recruited drivers is 8 percentage points higher than the previous quarter. Compared to the first quarter of 1983 there is an improvement of 7%.

2.1.7. Cash-flow problems

The percentage of firms facing cash-flow problems has slightly increased compared to the previous quarter, but is 7% less than in the first quarter of 1983.

At respectively 6% and 16%, the number of firms facing cash-flow problems is low in the Netherlands and Denmark.

Cash-flow problems are severe in Italy (72%), Greece (60%) and France (59%).

2.1.8. Investments : Significant improvement

At 40% the number of hauliers having made investments remains at about the level of the 4th quarter of 1983. Compared to the first quarter of 1983, investment has risen by 7%.

Tab.2.1

ECT-0311

ROAD TRANSPORT SURVEY

INTERNATIONAL TRANSPORT ACTIVITY

1. QUARTER 1984

FORECAST : 2. 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	13		
	=	46	54	48	49	49	55	44	44	48	45	48	53	56	77		
	-	34	28	33	31	29	26	38	33	29	31	31	24	22	10		
	S	-14	-10	-14	-11	-7	-7	-20	-10	-6	-7	-10	-1		3		
FRANCE	+	16	14	16	21	18	15	14	15	14	15	11	17	18	15		
	=	41	47	47	47	47	49	50	43	43	49	47	51	53	60		
	-	43	39	37	32	35	36	36	42	43	36	42	32	29	25		
	S	-27	-25	-21	-11	-17	-21	-22	-27	-29	-21	-31	-15	-11	-10		
ITALIA	+	15	15	17	18	15	16	14	15	14	15	17	23	16	37		
	=	41	44	42	53	49	47	41	51	45	54	47	49	53	53		
	-	44	41	41	29	36	37	45	34	41	31	36	28	31	10		
	S	-29	-26	-24	-11	-21	-21	-31	-19	-27	-16	-19	-5	-15	27		
NEDERLAND	+	30	20	25	26	34	32	26	31	31	37	26	40	31	31		
	=	41	65	49	52	43	45	41	50	44	44	38	42	49	64		
	-	29	15	26	22	23	23	33	19	25	19	36	18	20	5		
	S	1	5	-1	4	11	9	-7	12	6	18	-10	22	11	26		
BELGIQUE-BELGIE	+	25	28	22	31	28	31	23	30	27	28	21	35	30	25		
	=	46	41	43	44	48	51	43	47	46	51	44	47	47	64		
	-	29	31	35	25	24	18	34	23	27	21	35	18	23	11		
	S	-4	-3	-13	6	4	13	-11	7		7	-14	17	7	14		
LUXEMBOURG	+	25	27	12	26	28	26	21	25	21	35	26	21	33	21		
	=	46	49	51	61	48	50	51	47	52	49	52	61	44	70		
	-	29	24	37	13	24	24	28	28	27	16	22	18	23	9		
	S	-4	3	-25	13	4	2	-7	-3	-6	19	4	3	10	12		
UNITED KINGDOM	+	23	21	24	28	28	25	21	24	23	24	20	26	21	19		
	=	49	53	56	59	59	56	63	64	61	63	63	66	66	78		
	-	28	26	20	13	13	19	16	12	16	13	17	8	13	3		
	S	-5	-5	4	15	15	6	5	12	7	11	3	18	8	16		
IRELAND	+	18	24	21	25	21	27	20	28	21	23	23	21	13	18		
	=	30	47	39	40	48	39	38	37	47	50	60	60	68	67		
	-	52	29	40	35	31	34	42	35	32	27	17	19	19	15		
	S	-34	-5	-19	-10	-10	-7	-22	-7	-11	-4	6	2	-6	3		
DANMARK	+	24	20	21	24	25	26	17	27	26	19	19	29	21	21		
	=	57	65	61	61	65	64	61	62	66	65	64	64	62	74		
	-	19	15	18	15	10	10	22	11	8	16	17	7	17	5		
	S	5	5	3	9	15	16	-5	16	18	3	2	22	4	16		
HELLAS	+				27	16	14	17	28	19	32	24	29	27	23		
	=				47	45	31	34	36	39	39	43	43	45	51		
	-				26	39	55	49	36	42	29	33	28	28	26		
	S				1	-23	-41	-32	-8	-23	3	-9	1	-1	-3		
E.E.C.	+	20	19	20	24	22	21	19	23	21	24	19	26	23	22		
	=	44	50	47	50	50	50	46	49	48	50	49	52	54	66		
	-	36	31	33	26	28	29	35	28	31	26	32	22	23	12		
	S	-16	-12	-13	-2	-6	-8	-16	-5	-10	-2	-13	4		10		

KEY : % ENTERPRISES : + : INCREASE = : STABLE

- : DECREASE S : (+) - (-)

Tab.2.2

ECT-0321

ROAD TRANSPORT SURVEY

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

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

Tab.2.3
ECT-0331

ROAD TRANSPORT SURVEY

1. 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			
FRANCE	4	3	4	4	5	3	4	4	6	3	3	3	50			
ITALIA	22	29	28	22	21	24	18	16	17	25	19	20	15			
NEDERLAND	15	19	14	11	18	19	19	8	15	25	18	16	32			
BELGIQUE-BELGIE	17	18	19	10	21	26	19	15	18	22	21	15	23			
LUXEMBOURG	35	30	14	27	21	31	28	27	42	35	44	28	38			
UNITED KINGDOM	12	10	19	25	21	19	20	21	18	26	25	22	20			
IRELAND	24	12	12	24	17	15	10	19	21	15	27	24	26			
DANMARK	12	8	17	7	14	20	6	11	10	13	15	12	25			
HELLAS				40	36	24	25	20	29	28	25	19	22			
E.E.C.	12	12	14	11	14	15	12	10	13	15	15	12	20			

Tab.2.4
ECT-0341

ROAD TRANSPORT SURVEY

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

(3)

Tab.2.5

ECT-0351

ROAD TRANSPORT SURVEY

1. 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			
FRANCE	31	30	27	34	34	35	31	42	29	29	29	34	35			
ITALIA	26	29	26	27	26	25	21	20	18	24	25	34	24			
NEDERLAND	38	44	36	47	46	42	43	46	41	47	44	44	58			
BELGIQUE-BELGIE	30	36	30	29	30	39	32	38	42	40	42	46	41			
LUXEMBOURG	17	22	21	33	26	29	28	47	38	20	47	39	33			
UNITED KINGDOM	30	52	50	49	53	63	61	67	49	67	68	65	71			
IRELAND	28	27	30	29	25	22	27	19	31	24	44	46	55			
DANMARK	35	39	44	40	43	45	35	42	43	51	51	55	53			
HELLAS				46	33	42	24	29	42	34	34	37	42			
E.E.C.	31	33	31	34	33	36	32	38	33	35	35	41	40			

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. The German and the Dutch surveys give a breakdown of the cost factors by geographical relations.
The analysis of the surveys of Germany, France, the Netherlands and UK for this period are already made in our report number 11. We analyse here the Belgian/ Luxemburg and Denmark survey.

2.2.2. Overall cost developments (figure 2.5 and 2.6) : second half of 1983

In national currency, we noted a big increase for Belgium/Luxemburg (4.4%) and a very little for Denmark (0.4%).
In ECU, the increase is only about 1% for Belgium/Luxemburg and 0,4% for Denmark.

2.2.3. Fuell costs developments (figure 2.3 and 2.4) : second half of 1983

In national currency, we noted the biggest increase of all the countries for B/L (7.8%). Denmark is the only country where we noted a decrease (- 1.6%).

In ECU, the increase for Belgium/Luxemburg is about 4.2%; the decrease of fuel costs in ECUs for Denmark is about 1.5%.

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	86,2	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	114,5
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	106,6

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	101,7
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	104,2

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)	64,5	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	115,6
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	110,7

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	69,5	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	102,6
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	108,2

Figure 2.3

FUEL COSTS IN NATIONAL CURRENCY

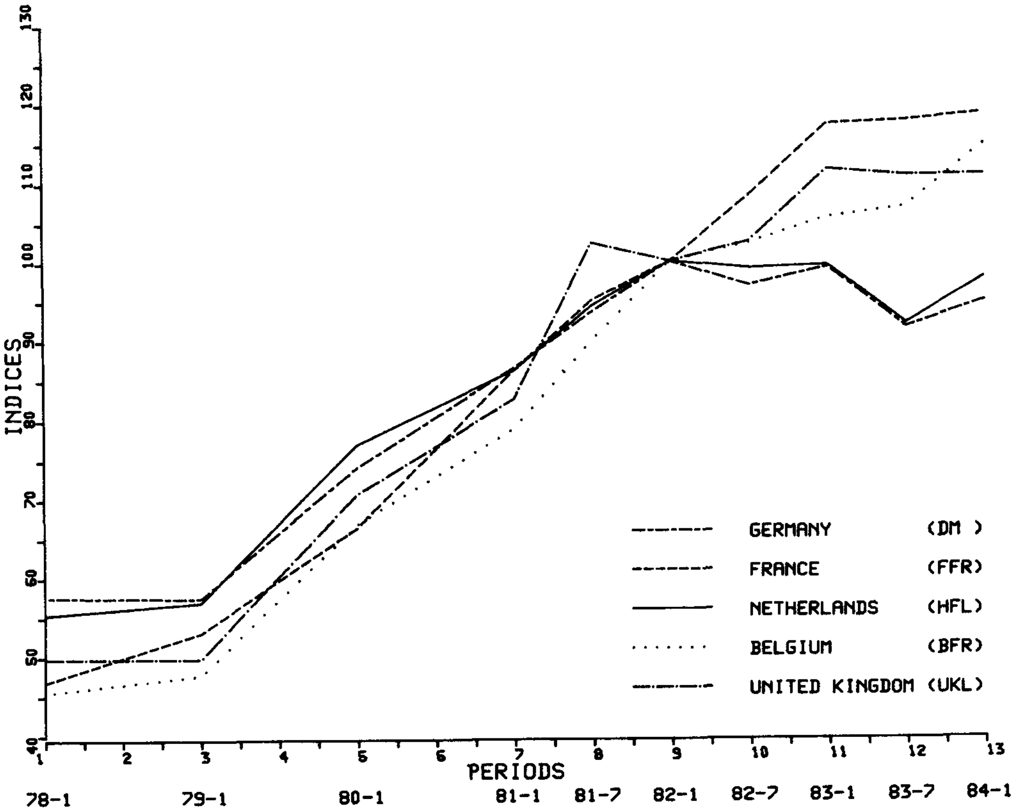


Figure 2.4

FUEL COSTS IN ECU

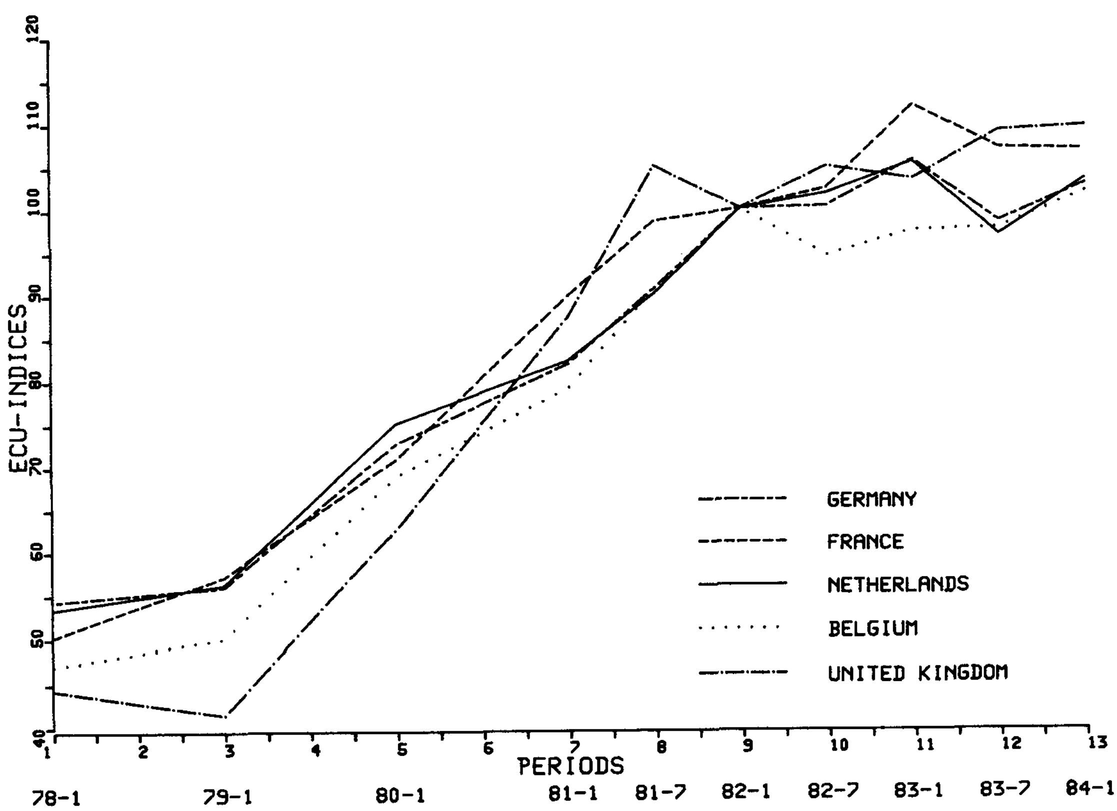


Figure 2.5

TOTAL COSTS IN NATIONAL CURRENCY

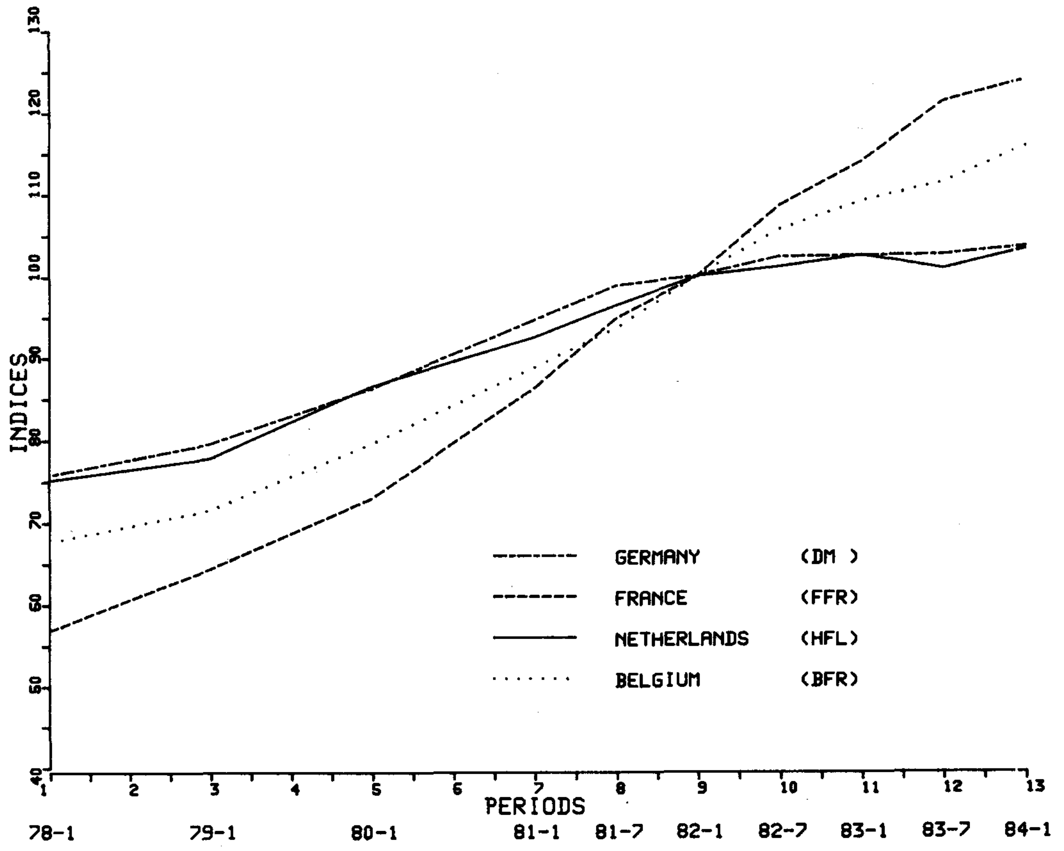
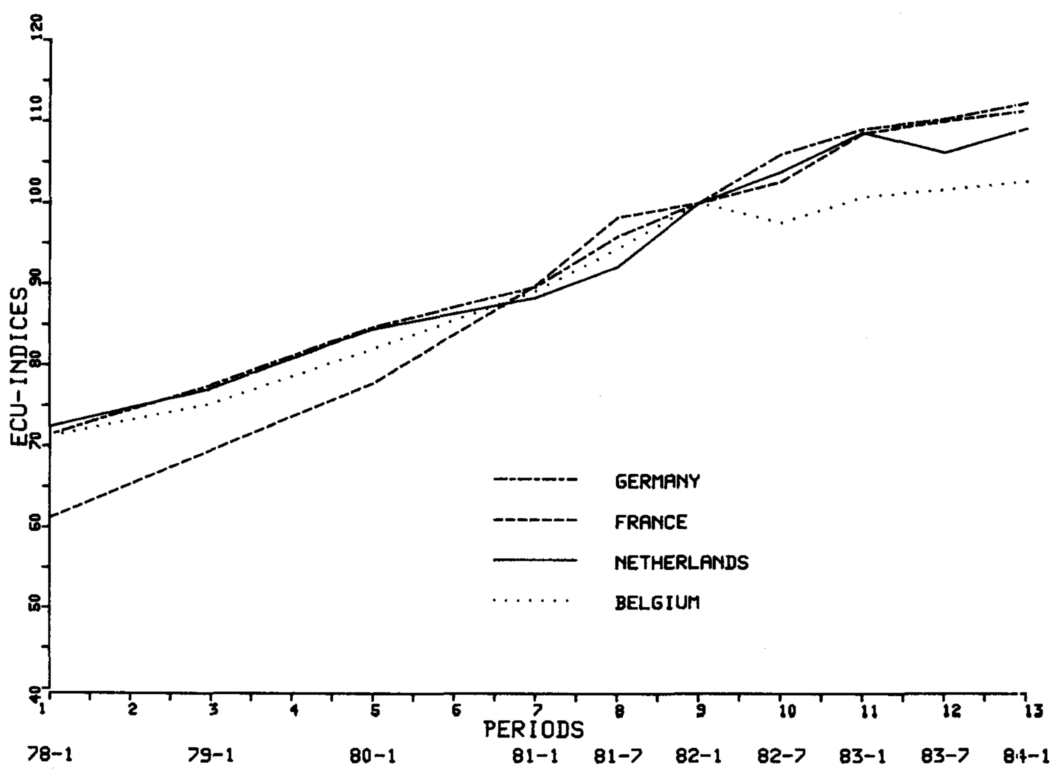


Figure 2.6

TOTAL COSTS IN ECU



2.2.4. Comparison with the evolution of the same half year of 1982

Evol.	In nat. currency Fuel costs 1/7/83 to 1/1/84	1/7/82 to 1/1/83	change	In ECU Fuel costs 1/7/83 to 1/1/84	1/7/82 to 1/1/83	change
Germany	+3.3%	+2.3%	+1.0%	+4.3%	+5.3%	-1.0%
France	+0.9%	-1.0%	+1.9%	-0.2%	-0.5%	+0.3%
Netherl.	+5.8%	+0.4%	+5.4%	+6.5%	+3.6%	+2.9%
B/L	+7.8%	+3.2%	+4.6%	+4.2%	+2.9%	+1.3%
U.K.	-	-0.9%	+0.9%	+0.5%	-1.5%	+2.0%
Denmark	-1.6%	+8.0%	-9.6%	-1.5%	+18.9%	-20.4%

Evol.	In nat. currency Total costs 1/7/83 to 1/1/84	1/7/82 to 1/1/83	change	In ECU Total costs 1/7/83 to 1/1/84	1/7/82 to 1/1/83	change
Germany	+1.0%	+0.1%	+0.9%	+2.0%	+3.1%	-1.1%
France	+2.6%	+5.3%	-2.7%	+1.3%	+5.9%	-4.6%
Netherl.	+2.4%	+1.4%	+1.0%	+3.0%	+4.8%	-1.8%
B/L	+4.4%	+3.4%	+1.0%	+1.0%	+3.2%	-2.2%
U.K.	+0.3%	+2.4%	-2.1%	+0.3%	+3.5%	-3.2%
Denmark	+0.4%	+9.1%	-8.7%	+0.4%	+10.1%	-9.7%

For Denmark, the increase during the second half year of 1982 was very high; the comparison with 1983 shows that there is a big difference in fuel costs and total costs in national currency as well as in ECUs.

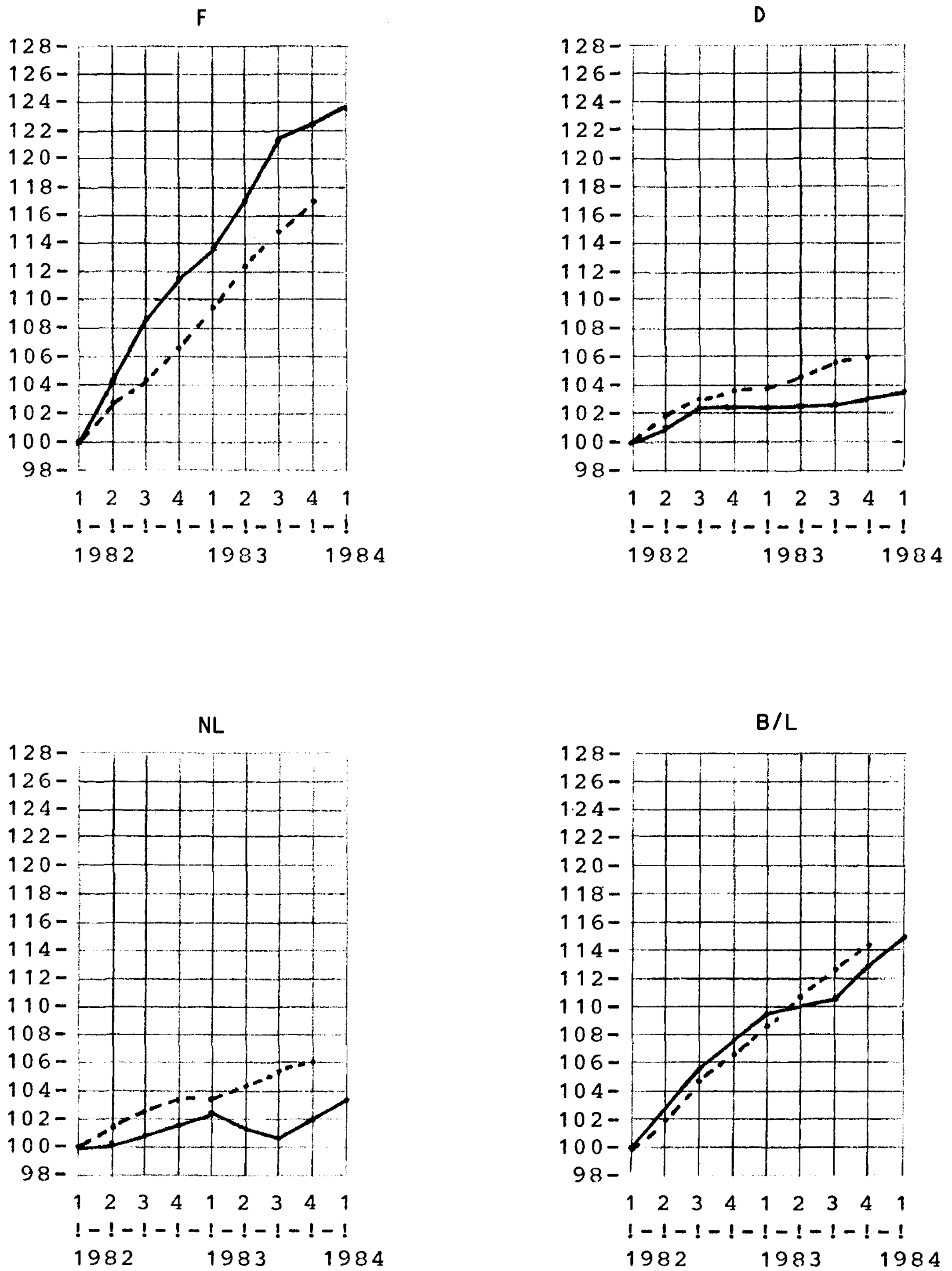
In national currency, for all the countries, Denmark excepted, fuel costs increased more in the second half year of 1983 than in the second half year of 1982.

In ECU, fuel costs have increased less in the second half year of 1983 for Germany (-1%) and Denmark (-20,4%), but for the other countries we noticed an increase in the second half year of 1983.

In ECU, total costs increased less in the second half year of 1983 for all the countries.

In national currency, total costs increased more in the second half year of 1983 for Germany, Netherlands, Belgium/Luxemburg and less for France, UK and Denmark.

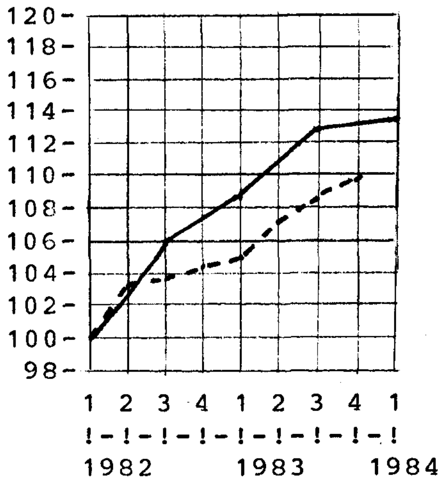
2.2.5. Comparison between total costs increase in national currency and inflation rate by country



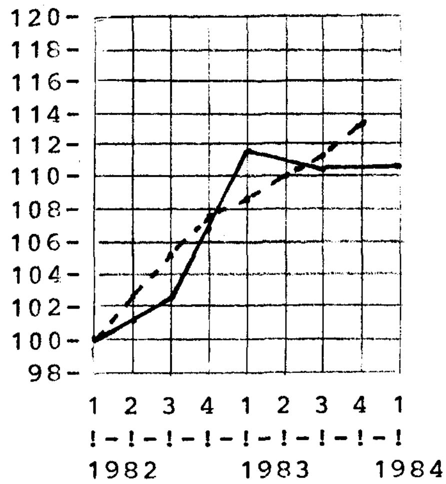
———————— cost

----------- inflation

UK



DK



The inflation rate is higher than the cost increase in national currency for Germany and the Netherlands.

Concerning France and UK, the costs increase is higher than the inflation.

Concerning Belgium, cost increase and inflation are very close. Concerning Denmark, in general, the inflation rate is higher than cost increase.

It seems that the total of the costs depends in a major part of the increase of fuel costs.
Indeed, if we look at figure 2.4. we will see that the two countries with the lowest fuel costs increase are the Netherlands and Germany.

(4)

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 fourth quarter of 1983. German and Belgium/Luxemburg data arrived too late.

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. The base point for the price indices results for Greece has been choosen as the third quarter 1983, which was the first quarter available. 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) have decreased for Italy (- 3%) and Netherlands (- 1.1%). The decrease for the Italian average price seems to be due to a insuffiency of journeys on the magnetic tape. Average prices in national currency have increased for France (2.3%) and Greece (1.8%).

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

Data for the fourth quarter of 1983 were received late, but it was possible to make a short analyse on another basis. In ECU, average prices increased in relation with France by 2%. In relation with Italy and the Netherlands, average prices decreased respectively by 1% and 1.5%. Average prices didn't change in relation with Belgium/Luxemburg.

French hauliers

In ECU, average prices increased for all the relations. The biggest increase was in relation with the Netherlands (+ 4.6%). The other increases are
1.6% with Germany,
and
1% with Italy and Belgium/Luxemburg.

Overall, average prices in ECU have increased by 1.6%.

Italian hauliers

In ECU, average prices decreased for all the relations, (excepted Belgium/Luxemburg + 1.2%), and specially in relation with the Netherlands (- 9.1%). In relation with Germany, average prices decreased by 5.6% and in relation with France by 0.4%.

Overall, average prices in ECU decreased by 4%.

Dutch hauliers

In ECU, average prices decreased for all the relations or didn't change (Germany).
Average prices decreased by 1.7% in relation with France and by 2.1% in relation with Italy. Data for the relation with Belgium/Luxemburg have not yet been received.
Overall, average prices in ECU increased by 1.6%.

Belgium/Luxembourg hauliers

Data for the fourth quarter of 1983 were received late. Analysis of results will be incorporated in the following report.

Greek hauliers

For the first time, Greek analysis is included in this report.

In ECU, average prices increased only in relation with Belgium/Luxemburg (+ 3.6%). In relation with the other Member States average prices decreased : Germany (- 4.7%), France (- 3.3%), Italy (- 1.6%) and the Netherlands (- 5.2%).

Overall, average prices decreased by 3.7%.

Comparison Q4 83 - Q3 83

relation with / Nation of hauliers	IN ECU						WEIGHTED AVERAGES	
	D	F	I	NL	BL	GR	In ECU	In nat curr.
D	-	+2.0	-1.0	-1.5	N.C.	N.A.	N.A.	N.A.
F	+1.6	-	+1.0	+4.6	+1.0	N.A.	+1.6	+2.3
I	-5.6	-0.4	-	-9.1	+1.2	N.A.	-4.0	-3.0
NL	N.C.	-1.7	-2.1	-	N.C.	N.A.	-0.6	-1.1
BL	N.A.	N.A.	N.A.	N.A.	-	N.A.	N.A.	N.A.
GR	-4.7	-3.3	-1.6	-5.2	+3.6	-	-3.7	+1.8

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

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

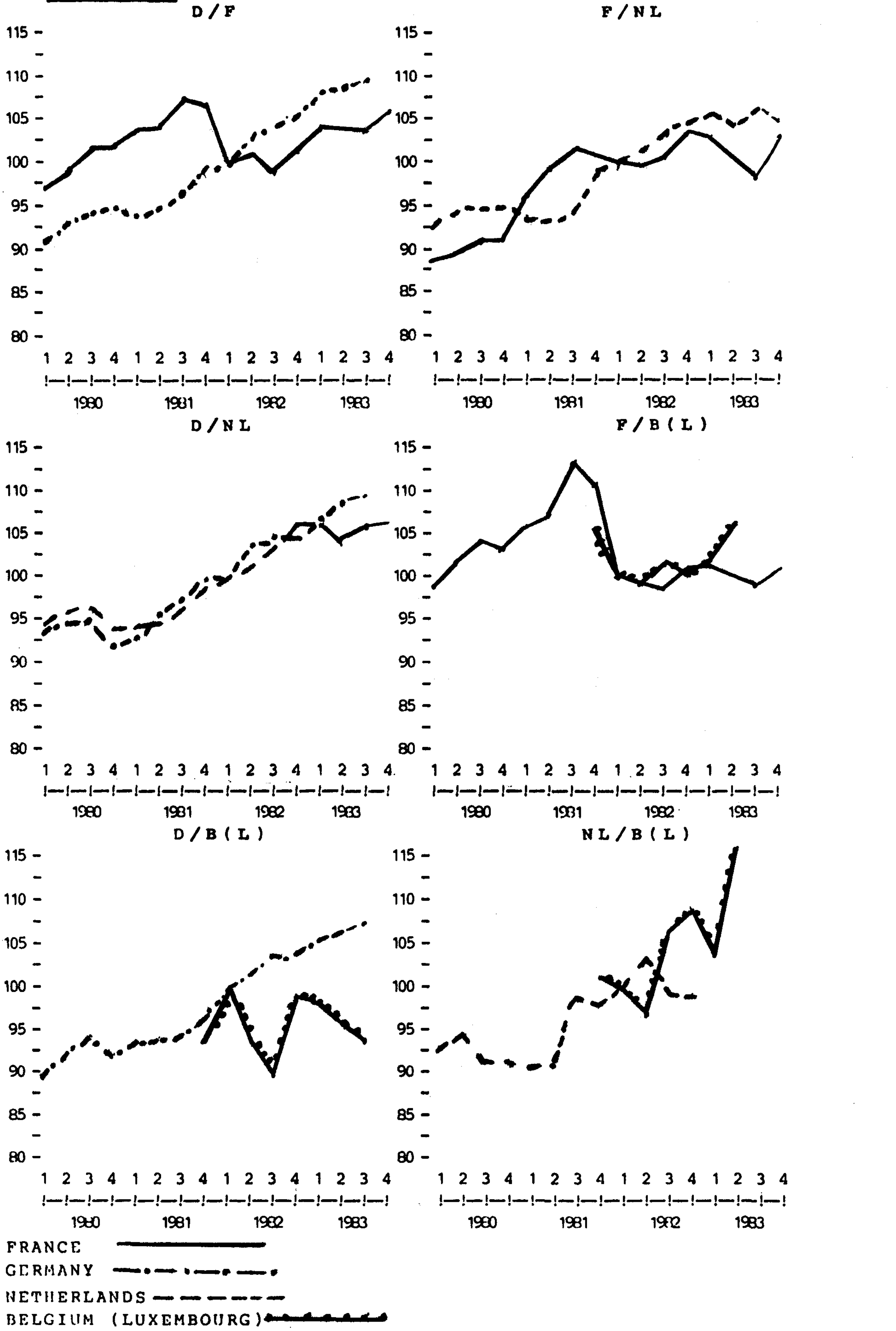


Figure 2.8: PRICE DEVELOPMENT IN RELATIONS WITH ITALY

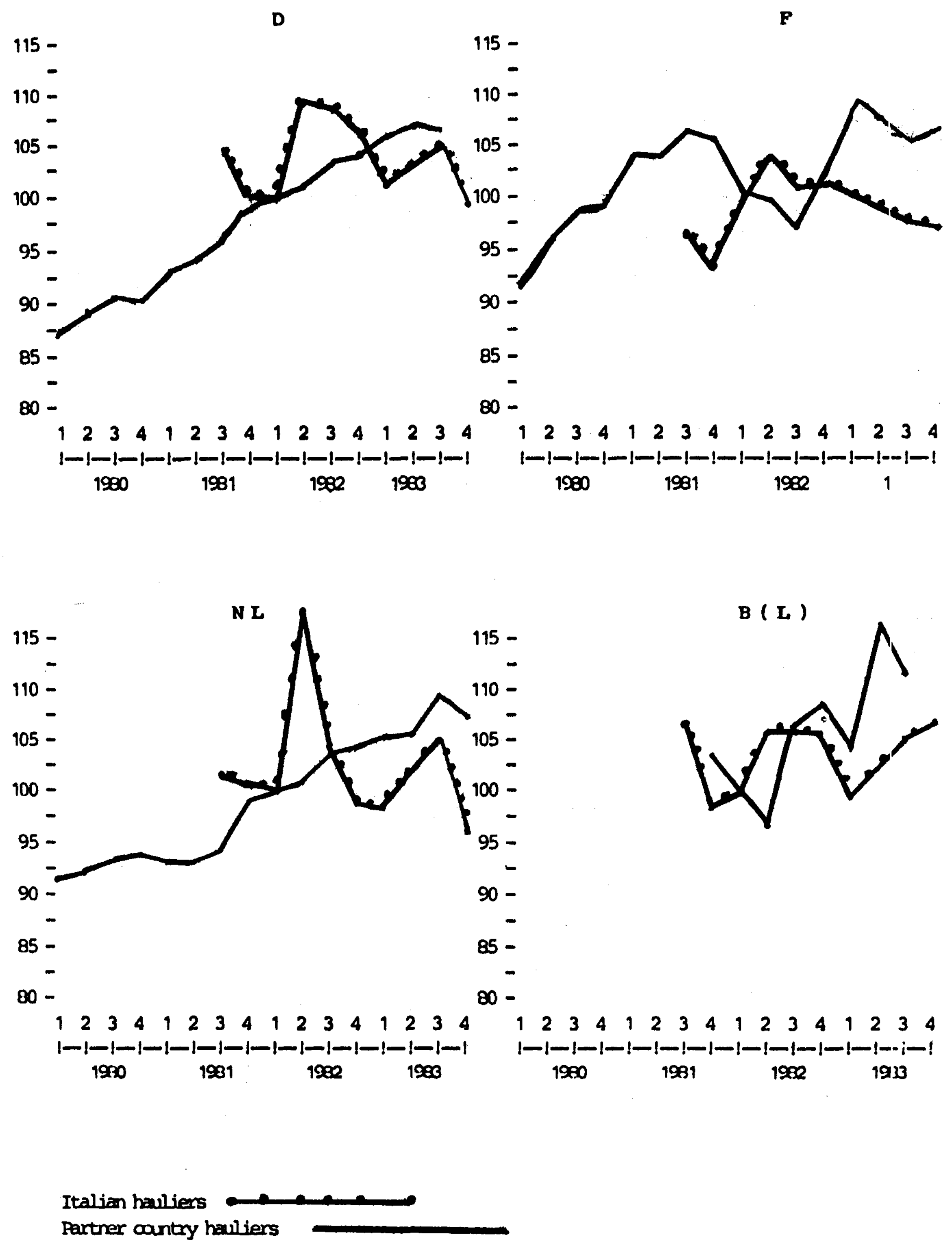
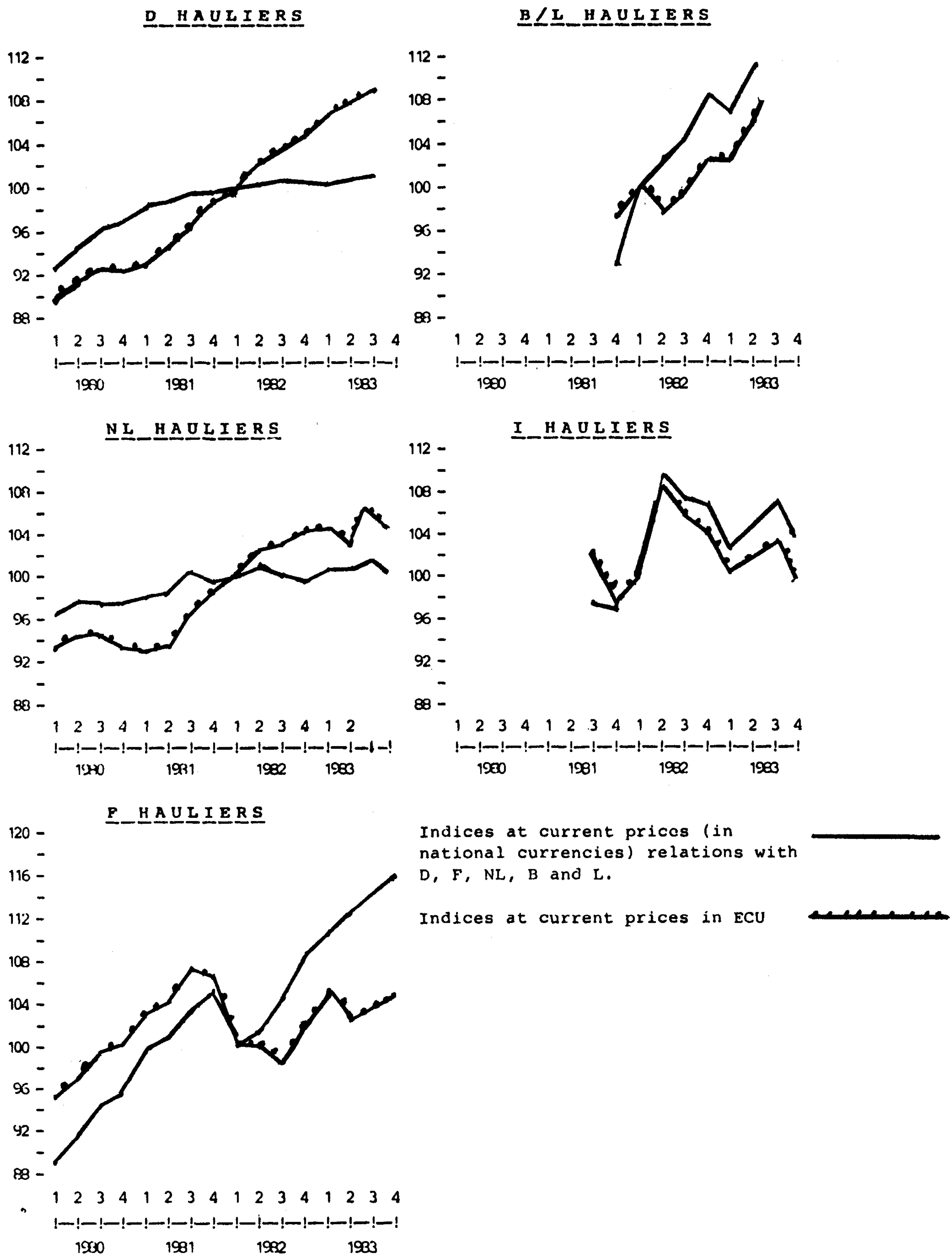


Figure 2.9: EFFECTS OF CHANGES IN EXCHANGE RATES



SECTION 3

WATERWAY SURVEYS

3.0. General assessment

As indicated in section 1, carriage by inland water-waterway showed a positive development during the fouth quarter 1983. The development during the second half of the year turned the outcome for the whole of 1983 to a positive one after a negative growthrate for 1980, 1981, 1982.

International traffic in tonnes during the fourth quarter is shown in the following table.

Table 3.0. : Inland waterway : international traffic in '000 tonnes, fourth quarter 1983.

from \ to	D	F	NL	B/L	EUR-5
D	-	657	7601	2474	10732
F	2165	-	803	852	3811
NL	16587	852	-	6564	24003
B/L	2928	1099	3943	-	7970
EUR-5	21671	2608	12347	9890	46516

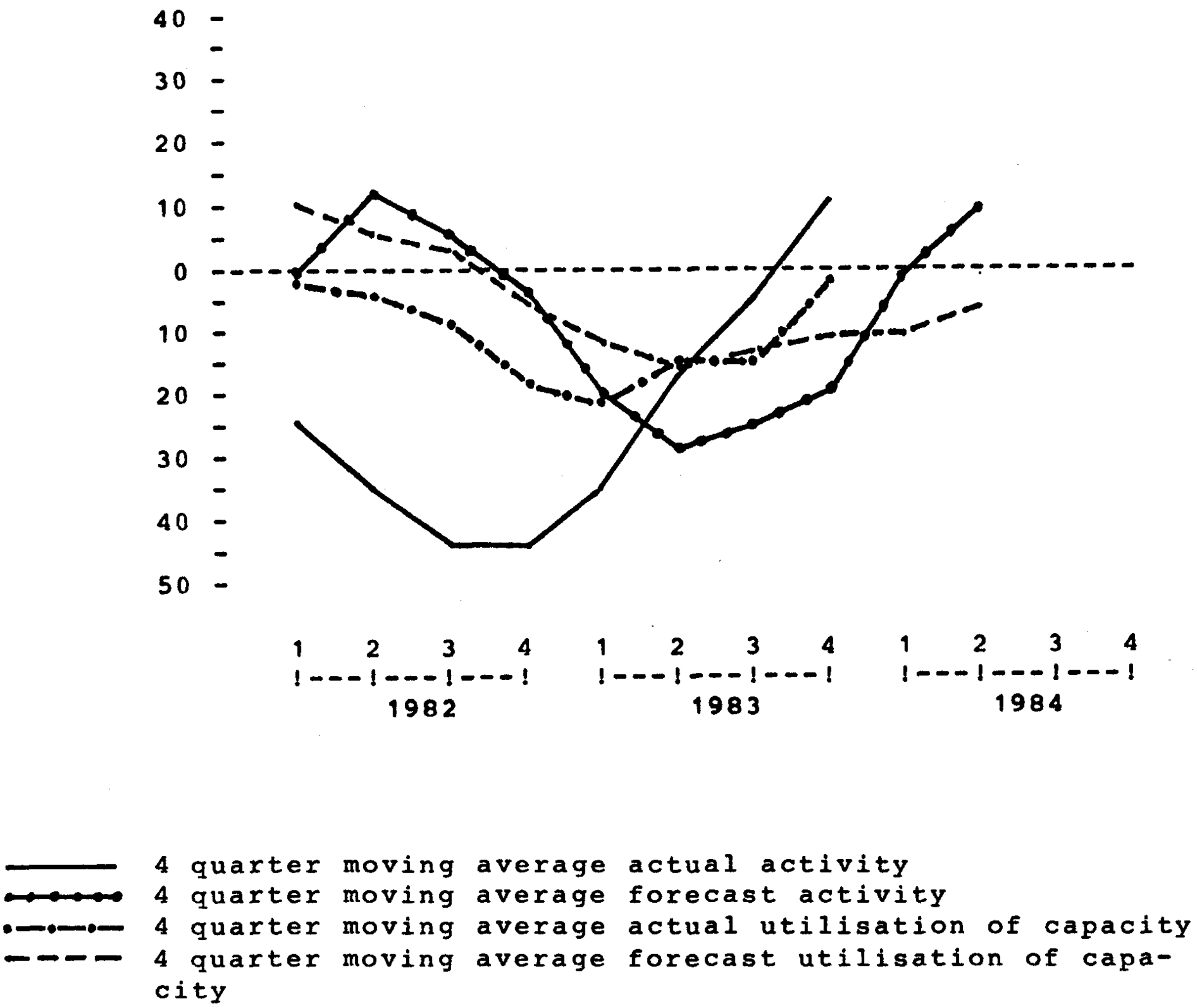
3.1. Rhine traffic

3.1.1. Activity

In the opinion of shippers surveyed, the level of activity for the fourth quarter 1983 is much better than that of the fourth quarter 1982. Also in relation to the previous quarter activity was improving during the fourth quarter 1983.

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

Aggregate balance of opinions (in percentage)



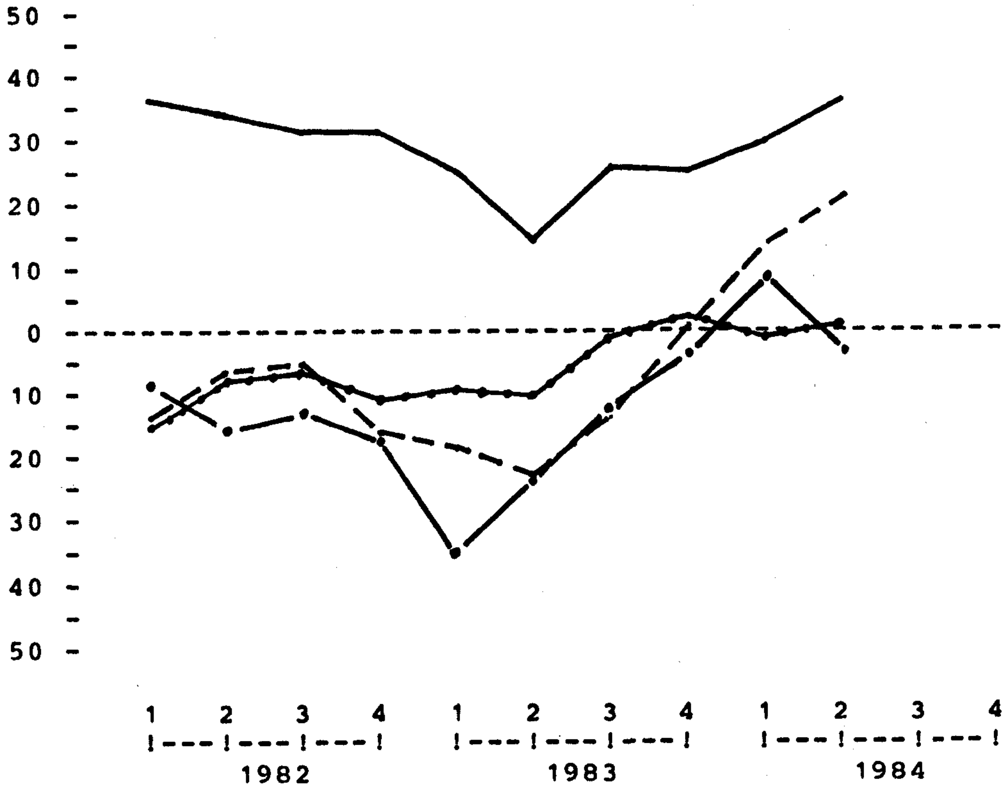
The continuing positive trend shown in figure 3.1. is confirmed by statistical evidence. Traditional Rhine traffic went up 5.2% compared with the last quarter of 1982. Upstream traffic at Emmerich/Lobith increased by 13.9% while downstream traffic improved by 3.2%.

3.1.2. Forecasts

The improvement in the level of activity is expected to continue in the second quarter 1984 (see figure 3.1., moving average forecast). This activity indicator shows a clearly positive sign.

Utilisation of total capacity on the Rhine for the second quarter of 1984 is expected to improve slightly but remains at a low level. The overcapacity is not dissapearing and utilization of capacity remains at an unsatisfactory 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 for coal and oil is continuing in the second quarter 1984. For sand and gravel the situation is seen as stable and for the transport of ore, shippers seem to be more pessimistic than they were for the first quarter 1984.

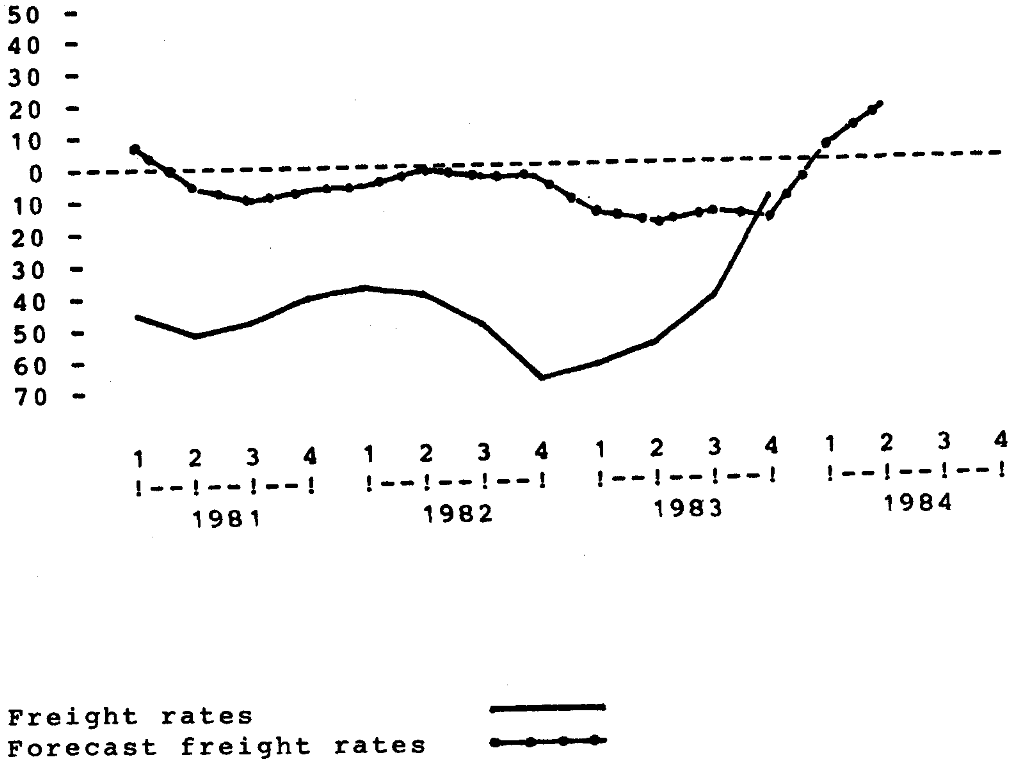
3.1.3. Freight rates

After being very low during 1982 and the first two quarters 1983, shippers feel that an upward trend started in the third quarter 1983 and continued in the fourth quarter 1983. However rates were still considered highly unsatisfactory.

The slow recovery of freight rates is expected to continue in the second quarter 1984.

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 first quarter 1984 on the North-South links are negative compared to the fourth quarter 1983 following the normal seasonal downturn and normal waterlevels on the Rhine. The fourth quarter 1984 turned out to be extremely good for the North-South given low waterlevels on the Rhine.

Compared with the same quarter 1982 and 1983, on the first quarter 1984, a slightly less pessimistic mood among transported could be noted.

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			

Although no survey is carried out in France, the statistical data availalable indicate that transport activity through North-South links, measured in tonnes, increased by 8.9% for French exports, and decreased by 7% for imports compared with the same quarter of last year. The overall situation remained stable (-0.2%).

The swing into the negative on the first quarter is confirmed by the change in the balance of opinions in quarter 1 compared with quarter 4, 1983, as shown in the following table.

Table 3.1. : Changes in activity assessment (difference in respective balance of opinion) by Dutch and Belgian shippers, Q1 1984 over Q4 1983 by bilateral relation.

From \ To	B	F	NL
B	- 12	- 46	- 30
F	- 25		- 20
NL	- 42	- 13	- 35

There is no exception in the negative assessments between Belgian and Dutch transporters. According to French statistics, on French domestic traffic a 8.2% decrease was noted.

The negative assessment of Q1 84 in relation to Q4 83 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 Belgian shippers Q1 84 over Q4 83 by tonnage class.

Tonnage class	Belgian shippers	Dutch shippers	Total
200-450	- 27	- 24	- 26
451-750	- 60	- 25	- 30
751-1150	+ 7	- 27	- 24
1151-1550	- 15	- 72	- 55
1551	- 20	- 85	- 51

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			
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			
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			

*Belgian domestic and Belgium to France

The same factors - the normal seasonal downturn and an extremely positive fourth quarter due to low waterlevels on the Rhine - explain the increase in the average number of waiting days during the first quarter 1984. Compared with the same quarter of last year, a decrease in the average number of waiting days could be noted in France and the Netherlands. For Belgium an increase emerged following a 9.8% decrease in traffic from Belgium to France according to French statistical sources.

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

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

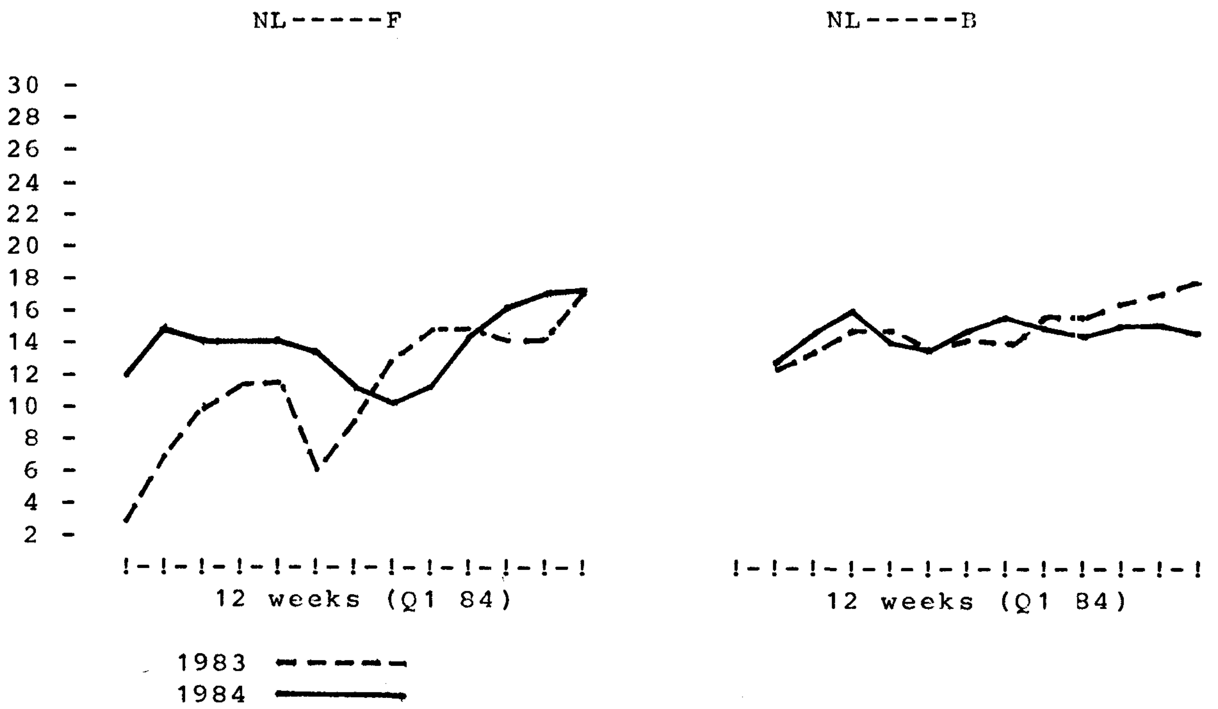


Figure 3.5.: Weekly average of waiting days in North-South traffic, from Belgium to France, including Belgian domestic traffic, and from Belgium to The Netherlands (bourse of Antwerp), first quarter.

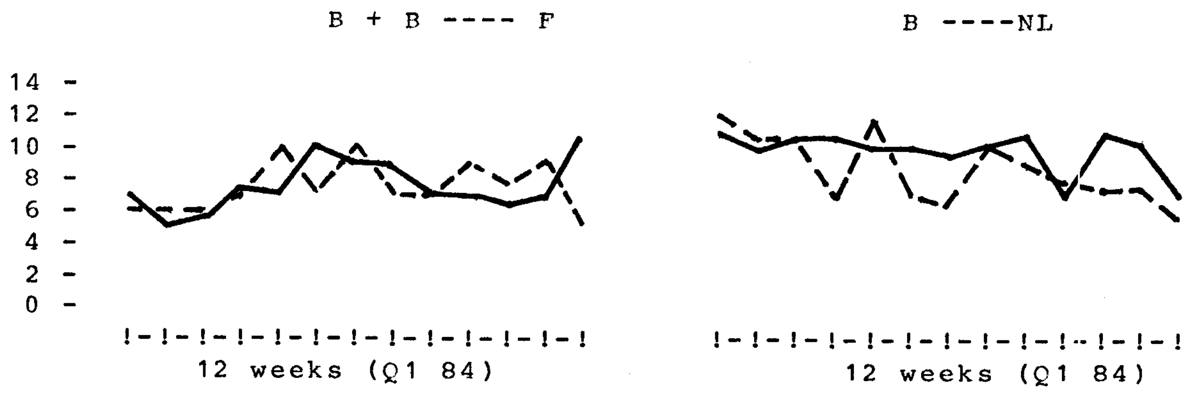
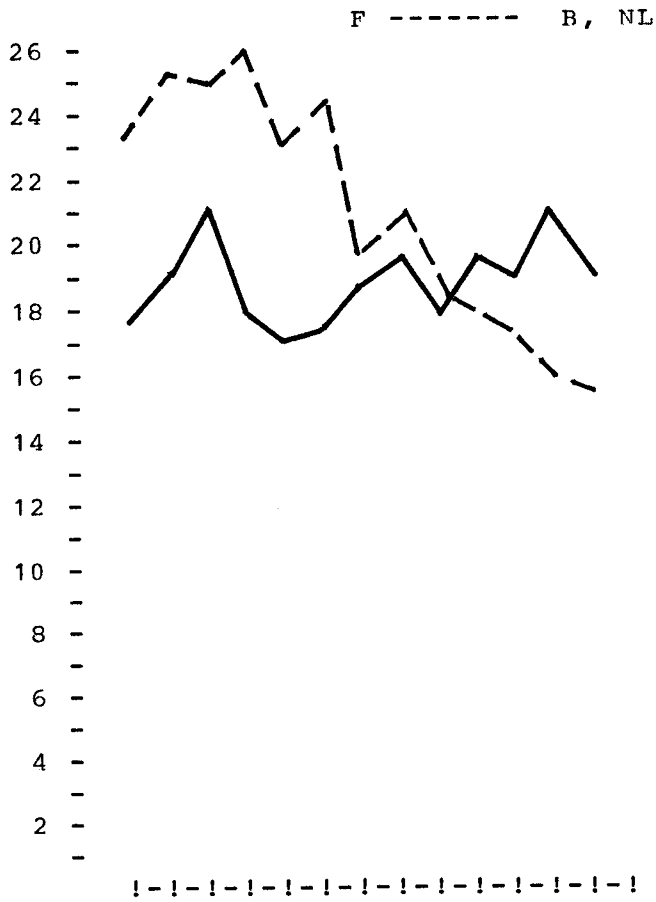


Figure 3.6. Weekly average of waiting days in North-South traffic from France, first quarter.



The general picture from these figures is the following:

- On all international relations the number of waiting days was about the same during the first quarter 1984 as during the same period of 1983, with the exception of the relation from France to Belgium and The Netherlands, on which a substential decrease could be noted.

- As far as France is concerned, it could be noted that the improvement of French outgoing traffic (+85.000 tonnes) was clearly offset by the decrease of demand for inland waterway transport services on the export market (- 90.000 tonnes).

3.2.3. Prices

More than 50% 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 Belgian transporters changed to positive, indicating an average freight level higher than the previous quarter. However, the balance of opinion of Dutch shippers was negative again after a positive outcome during the fourth quarter.

3.2.4. Forecasts : Again pessimistic.

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

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

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

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

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

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

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. Methodology

Cost indices are calculated for four shiptypes :

- ships having a carrying capacity of 350 tonnes;
- ships having a carrying capacity of 600 tonnes;
- ships having a carrying capacity of 1200 tonnes;
- pusher units.

Since the information on pusher units is not yet available these calculations are based on the costs of 4 motorvessels of 2200 tonnes.

The cost indices are calculated following a given cost structure in the base year (1.1.1982). The following cost elements are taken into account :

- wages
- capital
- fuel
- other costs

On waiting days the following assumptions were made :
Rhine : 1 day
N/S : 10 days

The calculations are based on the actual cost developments on 47 international traffic relations representing total international waterway transport in the Community. By weighting the various relations cost indices and cost elements, indices are found for each of the bilateral traffic relations between Member States and for the North-South and Rhine inland waterway transport markets.

The information will be collected twice a year, on 1 January and 1 July. Publication in the Quarterly Report is foreseen in the even numbered issues. Additional, more detailed information can be made available by the publisher.

3.3.2. Overall cost developments

Table 3.6. : Overall cost indices and cost indices by market on 1.7.1983 and 1.1.1984 in ECU (1.1.1982 = 100)

	Overall		Rhine		N-S	
	1.7.83	1.1.84	1.7.83	1.1.84	1.7.83	1.1.84
Wages	110.0	112.5	111.6	114.7	107.6	108.9
Capital	95.2	95.5	97.5	97 6	91.6	92.1
Fuel	99.5	108.2	100.0	108.3	98.9	107.9
Other costs	105.2	106.9	107.8	109.5	101.1	102.8
Total costs	104.0	106.2	105.5	107.9	101.9	103.6

Total costs went up in the second half of 1983 by 2.1%, which is a low figure given the average inflation in the relevant Member States. Following a fall in interest rates, capital costs went down further, but fuel costs, wage costs and other costs increased with 8.7%, 2.3% and 1.6% respectively. So in particular fuel costs went up considerably.

In Rhine shipping overall costs increased more in the second half of 1983 than on the North-South market (+ 2.3% against 1.7%). The increase in wages and capital costs were stronger in Rhine shipping, while other costs and fuel increased more on the North-South.

3.3.3. Cost developments by shiptype

Table 3.7. : Cost indices by ship type on 1.7.1983 and 1.1.1984 in ECU (1.1.1982 = 100)

	350 t.		600 t.		1200 t.		pusher units	
	1.7.83	1.1.84	1.7.83	1.1.84	1.7.83	1.1.84	1.7.83	1.1.84
Wages	107.8	108.9	107.0	108.1	110.7	113.4	112.1	115.8
Capital	90.7	91.6	92.8	92.9	96.5	96.6	97.9	97.4
Fuel	99.7	108.0	99.8	107.6	99.8	108.5	98.0	106.4
Other costs	100.7	102.7	102.0	103.9	106.3	108.0	108.9	110.4
Total costs	102.7	104.5	102.2	103.6	104.4	106.7	105.4	107.8

For the second half of 1983, costs increased more for the 1200 tonnes vessels (+ 2.2%) and pusher units (+ 2.3%) while overall costs for the 350 tonnes vessels and 600 tonnes vessels increased with 1.8% and 1.4%. In particular fuel costs increased.

3.3.4. Cost developments by flag

Table 3.8. : Total cost indices by nationality of the vessel on 1.7.1983 and 1.1.1984 in national currency (1.1.1982 = 100).

	B (FR)		D (DM)		F (FF)		NL (HFL)	
	1.7.83	1.1.84	1.7.83	1.1.84	1.7.83	1.1.84	1.7.83	1.1.84
Overall	105.3	106.7	102.7	104.5	111.7	115.9	100.3	102.1
Rhine	103.3	105.4	102.5	104.5	107.9	112.1	99.3	101.3
N-S	105.9	107.0			114.2	118.4	101.7	103.7

The overall cost indices in national currency by nationality of the vessel increased in the second half of 1983, in particular for France (3.8%), followed by the Netherlands (2.1%). In Germany and Belgium cost increases were small, 1.8% and 1.3% respectively. By nationality of the carrier few differences can be noted on the two different inland waterway markets.

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 recently on France-Netherlands links. DB have applied the method on Germany-France and recently on Germany-Belgium and Germany-Netherlands links. FS on Italy-France and SNCB on Belgium-Netherlands links. NS will join the experiment during 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	31.12.82	31.3.82	30.6.83	30.9.83	31.12.83	31.3.84
100	118.12	124.22	131.51	132.26	134.12	135.97

In the first quarter of 1984 the evolution of price indices on the French sector show an average increase of 21-28 % since 31.12.81 (except rail-road 31 %). Compared to the fourth 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	31.12.82	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84
100	108.98	113.75	113.84	114.13	115.71	117.61

For half of the representative commodities 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 fourth 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 28 % since 31.12.81 (except maize 18% and cars tariff 9674 15 %).

France-Belgium

31.12.81	31.12.82	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84
100	114.29	115.33	115.33	117.71	125.21	126.56

For the 9 representative commodities of this relation, the evolution of price indices varies considerably for both carriers. For SNCF it is between 24-28% and for SNCB it is between 20 and 33% (since the 31.12.81). Except for wheat and cereals, in the French sector, there was a change of 3% in the tariffs since the fourth quarter of 1983.
On the Belgium sector there was no change from the previous quarter.

France-Netherlands

31.12.81	31.12.82	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84
100	111.67	111.67	113.56	119.90	121.64	122.16

For five of the seven representative commodities in the Netherlands sector the price index has been below about 2% from the base established on 31.12.81 and there was no change in the tariffs from the previous quarter.
In the first quarter of 1984 tariffs of the French sector show an average increase of 19% since 31.12.81 (except Maize 35%). Compared to the fourth quarter 1983 there was a change of 3% in the tariffs of this sector.

Italy-France

31.12.81	31.12.82	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84
100	115.31	120.77	127.33	127.33	130.47	132.52

Germany-France

31.12.81	31.12.82	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84
100	108.06	113.65	113.98	113.98	115.68	

Analysis of results for the first quarter of 1984 will be incorporated in the following report.

Germany-Belgium

31.12.81	31.12.82	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84
100	105.28	106.78	111.60	112.24	112.24	114.06

Germany-Netherlands

31.12.81	31.12.82	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84
100	106.00	110.60	110.60	111.16	111.16	114.21

Belgium-Netherlands

31.12.81	31.12.82	31.3.83	30.6.83	30.9.83	31.12.83	31.3.84
100	108.67	113.93	113.93	116.29	116.29	119.50

Except for containers the evolution of price indices was the same for the two sectors. Thus in the first quarter of 1984 the price index has been about 20 % above the base established on 31.12.81.

4.2. RAIL : International traffic in '000 tonnes.
Fourth quarter 1983. EUR-7

to / from	D	F	I	NL	B+L	DK
D	-	1653	1166	541	1391	141
F	1088	-	1780	135	1745	19
I	501	464	-	135	250	12
NL	1054	306	143	-	191	3
B+L	929	1511	393	558	-	10
DK	81	7	14	2	9	-
EUR-7	3653	3941	3496	1376	3586	185

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

Intercontainer traffic in the 1st quarter of 1984 with 209,000 TEU was 13% above the corresponding quarter of 1983 and 2% above the 4th of 1983. With seasonal and other adjustments total traffic in 1984 should be between 3 and 5% higher than total traffic for 1983. Both maritime and continental traffic having increased sharply again. The growth of maritime traffic reflects the recovery of liner shipping services following the recession and particularly the continuing boom of West-bound cargoes on the North Atlantic associated with the strong US-Dollar. Loaded deep sea boxes consigned with Intercontainer increased again in the 1st quarter by 7% over the 4th quarter of 1983 where normally there is a slight seasonal fall at this time of year. Continental loaded traffic was also 7% above the 1st quarter of 1983. Movements of empty containers fell slightly, this being a tendency observed now for some two years. It reflects improving container control and distribution methods, especially on the part of the major container owners.Continental traffic continues to benefit strongly from the container pool arrangements set up in mid-1983 by Intercontainer with five of its member railways. By early 1984 around 1,000 container per month (1,200 TEU) were being provided for customers' continental cargo; half through the pool of railway containers and half through Intercontainer and other suppliers.

Swap body traffic has also grown in the period. In 1983 63,000 TEU of swap bodies were carried loaded in continental traffic. Traffic volumes have tented to increase on almost all routes, including those with Spain and Greece.

First indication for April and May are slightly less buoyant, but March was a record month for Intercontainer.

Direct traffic with Great Britain was affected by the strike in Britain of shipping services and is only now recovering again.

Traffic from and to USSR for China, for Iran and for the Far East was 18% above the 1983 level.

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 fourth quarter of 1983, compared to the third 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	% change from	
		Q4/83	Q3/83	Q4/82
Kombiverkehr	D	14940	17	29
Novatrans	F	2524	-20	28
	I(except D)	3052	4	
	UK	1325	-1	-2
FERPAC	I (to D)	2635	24	24
Trailstar	NL	1322	17	6
TRW	B	4041	40	35
Total		29839	13	22

While there were some exceptions in different companies, figures were much better in the fourth quarter of 1983 compared to the third 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 2123. Novatrans, trading in France in total traffic has a considerable decrease of 20 % due mostly in the F/I relation.

For Ferpac, Trailstar and TRW, after a bad quarter the units despatched in the fourth quarter shows again positive figures.

5.2.2. Important intra-Community relations (over 1000 units in Q4/83)

Relation	Units despatched Q4/83	% change from	
		Q3/83	Q4/82
D ------ I	7497	34	47
F ------ I	1530	-32	-8
I ------ F	1517	-9	-2
I ------ UK	1535	23	1
UK ------ I	1323		
I ------ D	2635	24	24
H ------ I	1082	19	7
B ------ I	2667	44	23
Total	19786		

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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