

THE CCNR PUBLISHES ITS MARKET INSIGHT/APRIL 2019

Ref: CC/CP (19)1

The new report on European inland navigation, drafted by the Central Commission for the Navigation of the Rhine (CCNR) in partnership with the European Commission, has just been published. The Market Insight report April 2019 provides a wealth of information on the situation of inland navigation in the third quarter of 2018 (Q3 2018). The executive summary of the report may be found below. The full report can be downloaded in PDF format in English, French, German or Dutch from <https://www.ccr-zkr.org/13020800-en.html> or viewed directly online at www.inland-navigation-market.org.

EXECUTIVE SUMMARY

The Market Insight report April 2019 contains extensive quantitative information on Inland Waterway Transport (IWT) demand in the Rhine and Danube basins, in main European inland shipping countries, in addition to data on vessels' loading degrees, freight rates, turnover and container transport. Specific information about IWT in Romania is also provided.

The overall development of IWT in Europe in the third quarter of 2018 (Q3 2018) was influenced by the low water period which occurred in the second half of the year. Transport performance on the Rhine and its affluents was impacted quite strongly, with -27 % in Q3 2018 compared to Q3 2017 for the traditional Rhine and -36 % for the affluents (Moselle, Saar, Neckar and Main taken together).

IWT national transport in the Netherlands (transport remaining in the country), where the low water period was less severe, remained resilient. However, the export traffic from the Netherlands, predominantly to Germany and to Belgium, suffered as much as the Rhine traffic. Overall, in the Netherlands, the performance of IWT in tonne kilometres in Q3 2018 was only 7 % under the level of the same quarter one year earlier.

Transport performance on the Danube lost 10 % in Q3 2018 compared to Q3 2017. On the contrary, the Lower Danube (Danube in Romania/Bulgaria), which has a share of 75 % of total Danube transport performance, increased its performance by 2 %, therefore acting as a stabilising factor for the whole Danube. Transport performance on the Middle and Upper Danube stretches heavily declined (-38% and -48% respectively).

An analysis of the impact of low waters on vessels' loading degrees reveals regional differences for the Rhine, but also for the Danube. On the Upper and Middle Rhine stretches (between Basel and Cologne), vessels' maximum loading degrees fell to levels between 40 % and 50 %, while the loading degrees remained above 60 % for the Lower Rhine (between Cologne and Duisburg).

Such a difference was also observed in the Danube basin. On the Danube in Germany, vessels' loading degrees fell to levels between 40 % and 50 %, while they remained on a much higher level on the Danube in Austria and Hungary.

It can be observed on both the Rhine and the Danube that larger vessels experienced a more important reduction of their loading degree compared to smaller vessels.

As a consequence of the aforementioned operational patterns, freight rates for dry and liquid cargo increased to very high levels. In the whole Rhine basin, dry cargo freight rates were more than twice as high as under normal water level conditions. The price increase was far stronger for the traditional Rhine than for the Netherlands.

The Market Insight report also contains an origin-destination analysis of container transport on the Rhine, where TEUs transported on the Rhine are sorted according to country of loading and country of unloading.

The results show that TEUs are exported from French, German and Swiss Rhine ports to Belgium and the Netherlands, and that Belgium receives more TEUs from the hinterland than the Netherlands. However, in the opposite direction (TEUs coming from the seaports in Belgium and the Netherlands and going to French, German and Swiss Rhine ports), the Netherlands sends more TEUs to the hinterland than does Belgium. These results point to differences in the specialisation of seaports within hinterland traffic by IWT.

ABOUT THE MARKET OBSERVATION AND MARKET INSIGHT

The Market Observation and Market Insight reports are respectively annual and biannual publications by the CCNR dealing with the European inland navigation market. The CCNR also publishes a thematic report once a year, the theme of which is defined in consultation with the European Commission. These analyses of the economic situation, which are free of charge, aim to assist strategic decision making in this sector in Europe, by both the profession and firms as well as in terms of transport policy and within administrative authorities. The gathering and analysis of this data by the CCNR has been co-financed by the European Commission since 2005. This fruitful collaboration has enabled the CCNR to extend this activity, which historically it has been carrying on for almost two centuries, beyond the Rhine region to cover all Europe's navigable waterways.

We wish you an enjoyable read!



ABOUT THE CCNR

The Central Commission for the Navigation of the Rhine (CCNR) is an international organisation that exercises an essential regulatory role in the navigation of the Rhine. It is active in the technical, legal, economic and environmental fields. In all its areas of action, its work is guided by the efficiency of transport on the Rhine, safety, social considerations, and respect for the environment. Many of the CCNR's activities now reach beyond the Rhine and are directly concerned with European navigable waterways more generally. The CCNR works closely with the European Commission as well as with the other river commissions and international organisations.



Palais du Rhin
2, place de la République - CS10023
F - 67082 Strasbourg Cedex

Tél. +33 (0)3 88 52 20 10
Fax +33 (0)3 88 32 10 72

ccnr@ccr-zkr.org
www.ccr-zkr.org