

## THE CCNR PUBLISHES ITS MARKET INSIGHT/NOVEMBER 2019

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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 executive summary of the report may be found below. The full report can be downloaded in PDF format in English, French, German or Dutch or viewed directly online at [www.inland-navigation-market.org](http://www.inland-navigation-market.org).

### EXECUTIVE SUMMARY

Transport performance on inland waterways in the European Union during the first quarter (Q1) of 2019 recovered from the low water period in the second half of 2018. Indeed, with a value of 37.5 billion tonne-kilometres in Q1 2019, transport performance was 30 % higher than in the fourth quarter (Q4) of 2018, a period during which the Rhine, the Danube and the Elbe suffered heavily from low waters.

Among the three countries with the highest IWW transport performance in the EU (Germany, the Netherlands, Romania) in Q1 2019, the growth rate in Q1 2019 compared to Q4 2018 was the highest in Germany (+62 %), which was mainly a result of the large-scale resumption of transports on the Rhine. The EU IWW transport performance in Q1 2019 was also 5.5 % higher compared to the same quarter one year earlier (Q1 2018).

An exception from the recovery is container transport. Its performance on the traditional Rhine was still 11 % lower in Q1 2019 than in Q1 2018. This can be explained for several reasons:

1. In the first half year 2018, a modal shift from rail to IWT had taken place due to the effects of the Rastatt accident (interruption of railway line on the Rhine axis). Such effects were no longer visible in Q1 2019.
2. According to some main logistics operators, shippers became more reluctant to choose inland waterways for container transport in the wake of the low water crisis.
3. A cooling off in economic framework conditions, notably of world trade, has occurred since the second half of 2018. This had a more important effect on container transport than on mass cargo transports.

Transport evolution in France benefitted in Q1 and in the second quarter of (Q2) 2019 from a booming surge in traffic (+34 % in the ports of Paris compared to Q1 and Q2 2018) of sands, stones, gravel and building materials, mainly responsible for a strong growth in the overall dry cargo transport activity in France (+23 %). This boom can be explained by the increasing construction activity in the French capital (Grand Paris express project) and the absence of floods on the Seine in 2019 (unlike in 2018).

Freight rates in the Rhine basin subsided in Q1 and Q2 2019, more or less in parallel with normalizing water levels. The available quarterly turnover data (for Germany and the Netherlands) show that turnover evolution followed mainly the evolution of transport prices.

A special focus chapter shows key annual figures for the German inland waterway sector (either 2018 or 2017, depending on the indicator concerned). It shows that inland waterway (IWW) goods transport on German territory accounts for 36 % of all IWW goods transport performance on EU waterways, and that 21 % of all IWW goods transport companies in the EU are German, representing 27 % of all IWW passenger transport companies in the EU. The economic turnover generated by the German goods transport companies represents 34 % of all economic turnover generated by goods transport on EU inland waterways, and is therefore almost identical with the German share in EU transport activity (36 %). For the German passenger transport companies, the share of economic turnover within EU turnover is 22 %.

### 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.*



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