

THE CCNR PUBLISHES ITS THEMATIC REPORT/JANUARY 2020

Ref: CC/CP (20)2

The Central Commission for the Navigation of the Rhine (CCNR), in partnership with the European Commission, publishes annual and biannual reports dealing with the European inland navigation market. From 2020 onwards, thematic reports will also be published once a year. This thematic report on river-sea transport is the first in a series.

No dedicated report providing detailed data on river-sea transport is currently available, hence the decision to dedicate a report to this specific topic, with the objective to improve knowledge and information about river-sea transport in Europe. As only few statistics on river-sea passenger transport are available, this report focuses on river-sea goods transport.

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

EXECUTIVE SUMMARY

River-sea transport consists in a transport operation partly by inland waterways (IWW) and partly by sea, without transshipment. River-sea transport must therefore not be confused with transport operations combining inland and maritime transport and requiring transshipment operations between the two. River-sea transport can be performed by a seagoing ship or an inland vessel. These two general cases of river-sea transport activities should be distinguished and are analysed separately in the report.

River-sea transport performed by a seagoing ship

In most of the cases, river-sea transport (or lake-sea transport in Sweden and Finland) is performed by small seagoing vessels (also known as river-sea ships), which have an International Maritime Organisation (IMO) number and are able to navigate both on certain stretches of inland waterways and at sea. This case represents the large majority of all river-sea transport volumes in Europe. A typical river-sea transport operation might start in an inland port (e.g. Duisburg), continue on a river (Rhine), pass a seaport (Rotterdam) without transshipment, continue on maritime waters (the North Sea) and end in a seaport or in an inland port of another country (e.g. in London).

River-sea ships must comply with technical and regulatory requirements in force in both sea and inland waterway areas. On the river Rhine, additional Rhine related requirements apply. In terms of environmental requirements, they are only subject to those applicable to seagoing ships. Beyond such requirements, conditions for river-sea shipping also vary between countries and greatly depend on the geographical situation, the sailing area, the

waterways infrastructure and weather conditions. River-sea ships are therefore generally designed for operating in a specific sailing area.

The clear advantage of river-sea shipping lies in the absence of seaport transshipment, which results in lower transport costs, time-saving and a reduced risk of damage to goods, as well as its unique market range. While the versatility of river-sea shipping is an advantage, it is also a drawback, compared to maritime shipping, as its good functioning also depends on the navigation conditions on inland waterways. An important challenge for river-sea shipping therefore lies in its ability to provide transport services all year round and under all weather conditions. In addition, compared to ships exclusively sailing on the sea, river-sea ships are limited in their capacity in order to be able to navigate on inland waterways, making it more difficult for river-sea ships to realise economies of scale.

At present, almost 90.5 million tonnes of goods are transported via river-sea transport in Europe. River-sea transport takes place on all major rivers in Europe that have a connection to the open sea.

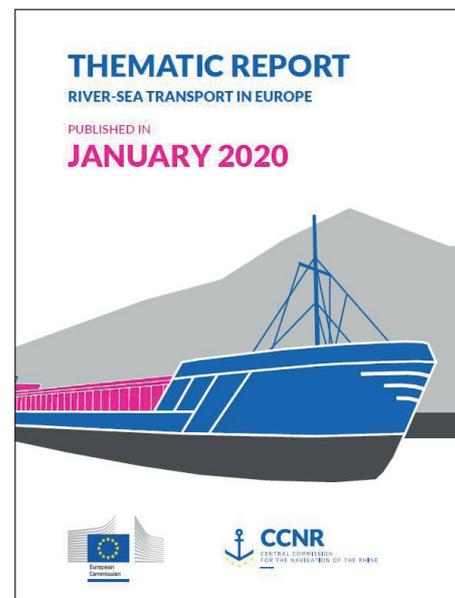
The country with the most important volume of river-sea transport in Europe is the United Kingdom (around 47 million tonnes). London, the River Thames, as well as the estuary of the river Humber in north east England, the River Forth in Scotland, and other estuaries are important areas of river-sea activity. Overall, river-sea transport has shown a growing trend in recent years in the United Kingdom.

Russia and Ukraine are two countries with a significant level of river-sea transport, due to very favourable natural conditions. In 2018, around 25 million tonnes of cargo were transported by river-sea ships in Russia, making it the second largest market for this type of transport in Europe.

River-sea transport is also well developed in Sweden and Finland, taking the form of lake-sea transport, where lakes (Lake Vänern and Lake Mälaren in Sweden, and Lake Saimaa in Finland) represent the inland component of the activity. The main product groups traded are wood products and timber.

In western Europe (the Netherlands, Belgium, Germany and France), river-sea transport concentrates mainly on the following areas: the Lower Rhine, the Lower Schelde, the Ghent-Terneuzen Canal, the Maas, the Albert Canal, the Seine and the Rhône.

The Lower Rhine is the nerve centre for river-sea transport in Germany, and a major area for the Netherlands. Steel is the most important segment for river-sea transport in the region, due to the steel industry in Duisburg, which uses the Rhine



as an export route for iron, steel, metals and metal products. A large part of these exports goes to the United Kingdom and Scandinavia.

Steel-related products also constitute the main goods segment transported via river-sea in Belgium and in the Netherlands. Indeed, steel products are exported from the Belgian port of Ghent mainly towards the UK through the Ghent-Terneuzen Canal, the Schelde estuary and the North Sea.

Steel-related products and raw materials (ores, scrap metal and metal products) also have the highest share within total river-sea transport in France. As in Germany, exports have around a two-thirds share within the total river-sea transport volume in France. Unlike Germany, the French river-sea routes are mainly linked to countries along the Mediterranean Sea (Turkey, north Africa).

In south-eastern Europe, the Lower Danube offers good natural conditions for river-sea transport. River-sea traffic registered in the three Romanian river-sea ports of Galati, Braila and Tulcea, has been quite stable since 2012. Iron and steel related products, as well as raw materials and agricultural products, are the most important goods segments for river-sea transport in Romania.



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River-sea transport performed by an inland vessel

There are also specific areas in Europe where inland vessels are able to make restricted journeys at sea between two ports of the same country, provided they hold an appropriate authorisation. This authorisation can be obtained subject to compliance with classification and regulatory requirements, which are not harmonised at EU level. This option can be particularly relevant whenever a maritime/coastal port is not sufficiently connected to the inland waterway network, insofar as there is an underlying economic rationale. However, it is currently not permitted in several EU countries.

This type of transport can, for instance, be found in Belgium (known as estuary traffic), where a limited sea trajectory has to be performed by an inland vessel to connect the Port of Zeebrugge to the European inland navigation network (mainly through the North Sea Port and the Port of Antwerp). Estuary goods traffic registered at the Port of Zeebrugge amounted to 2.1 million tonnes in 2018.

In France, some inland vessels are also authorised to operate alongside the coastline in domestic maritime areas in order to connect the container terminal of the Port of Le Havre (Port 2000) to the river Seine. This possibility has recently been extended to other areas in France following the adoption of a national regulation in October 2018, with requirements having to be met by inland vessels to obtain the appropriate authorisation depending on the relevant route.

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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