THE CCNR PUBLISHES ITS MARKET INSIGHT/FALL 2018

Ref : CC/CP (18)18

The new quarterly 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 Fall 2018 Market Insight provides a wealth of information on the situation of inland navigation during the first half year of 2018. The executive summary of the report may be found below. The full report can be downloaded in PDF format in Dutch, English, French or German from https://www.ccr-zkr.org/13020800-en.html or viewed directly online at www.inland-navigation-market.org.

EXECUTIVE SUMMARY

Overall, transport demand in the European inland shipping industry has enjoyed an upward trend during the first half year of 2018:

1. On the traditional Rhine, transport performance (TKM) in Q1 2018 was +9% higher than in Q1 2017. The value in the second quarter 2018 was at the same level as one year previously. Therefore, the total transport performance in the first half year 2018 was 4.3% higher than in the first half year 2017.
2. Transport performance on the North-South axis (waterway network in Belgium and the Netherlands) and on the Rhine affluents was 1.1% higher in the first half year 2018 when compared to the same period in 2017.
3. On the Danube, Q1 2018 saw an increase of 13.3% compared to Q1 2017, but the results for the second quarter are not yet available.

A detailed analysis by product segment shows that the more long-term trend in the German inland waterway transport is stagnating somewhat due to the fact that most of the dry cargo goods segments show a constant evolution. In Belgium, however, the important transport of sands, stones and building materials has been growth orientated for many years.

The report also analyses the turnover of goods transport and passenger transport in European IWT, both from a short-term and a long-term perspective. In the long term, the share of passenger shipping in the total European IWT turnover is rising: its share increased from 23% in 2010 to 29% in 2016. The driving force is the strong growth in the European river cruise sector, especially for countries where many cruise vessels are registered (Switzerland, Germany, France and the Netherlands).

For the short-term perspective, the available quarterly turnover data in European IWT (data for the Netherlands, Germany, Austria, Slovakia and Hungary) show a positive evolution in Q1 and Q2 2018, both for goods transport and passenger transport.

Although this report covers mainly the first half year 2018, some data (concerning freight rates) for the second half of the year are available already. These data confirm that the dry summer period caused a strong low water situation on many European rivers. This had an impact on economic parameters such as loading degrees, freight rates (prices), and volumes.

The report also contains a new chapter entitled "Focus on..." and presents key IWT figures for one specific country in Europe. The first edition of this new series presents the Netherlands, a country which represents 33.3% of the total IWT transport performance in the EU, and where 43% of all IWT companies in the EU are present. The turnover of these companies represents 37% of the total IWT turnover in the EU. With regard to goods transport companies, the share of Dutch companies in terms of turnover is even higher (47%). Finally, the Dutch cargo fleet has a share of 37% of the total number of cargo vessels in the European IWT sector.

ABOUT THE MARKET OBSERVATION AND MARKET INSIGHT

The Market Observation and Market Insight are respectively annual and quarterly publications by the CCNR dealing with the European inland navigation market. Free of charge, these analyses of the economic situation 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.

CCNR
CENTRAL COMMISSION
FOR THE NAVIGATION OF THE RHINE

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