

## THE CCNR PUBLISHES ITS MARKET INSIGHT / NOVEMBER 2021

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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 (TKM, Tonne-Kilometre) on inland waterways in the EU has been adhering to a small and rather narrow recovery path since Q3 2020. In the first quarter of 2021 (Q1 2021), transport performance was 4.0% higher than in Q1 2020. Rhine countries experienced an overall increase of 1.0%, while Danube countries followed a more dynamic surge (+14.8%), thanks to growing grain transport.

For the two largest IWT\* countries, Germany and the Netherlands, the result remained almost stable in Germany (-0.1%) while a small increase was observed for the Netherlands (+1.9%).

A differentiation by cargo segments for the Rhine reveals that dry cargo (iron ore, coal, grain) increased slightly, whereas liquid cargo had weaker results in Q1 2021 compared to the same period the previous year. This was due to a reduction of petroleum products transport, reflecting the impact of the pandemic on the mobility sector.

Passenger transport still remained far below pre-pandemic levels in the first half year of 2021. Data for the lock of Iffezheim on the Upper Rhine indicate that only 55 cruise vessels passed this lock in the first half year of 2021, compared to 63 in the first half year of 2020, but 1,078 in the first half year of 2019. The gap between (Q1+Q2) 2021 and (Q1+Q2) 2019 represents 94.9%.

Freight rates for dry cargo and container transport have increased since Q3 2020, mirroring the recovery in transport demand. Freight rates for liquid cargo have not shown any recovery since this quarter. The reason is a structurally reduced mobility demand that reduces transport demand for liquid products.

During the course of 2021, oil prices and thus fuel prices, continued on an upward trend that began in late 2020. Fuel prices settled at around 50 Euro per 100 litres in Q2 2021. The forecast for fuel prices points to a range between 54 and 60 Euro per 100 litres for 2022, based on oil price forecasts.

A special chapter of the report is dedicated to Serbia. The IWW\*\* transport performance amounted to 4,225 million TKM for the year 2020, which accounts for a share of 3.2% within transport performance in the EU (plus Switzerland, Serbia, Ukraine). The focus of IWT in Serbia lies in the transport of dry mass cargo. Within Serbian IWT, a positive development in recent years was the strong increase in iron ore and steel transport in the port of Smederovo. This development was facilitated by the renovation of the main Serbian steel plant by a foreign steel company.

The employment in Serbian IWT is largely dominated by freight transport, where 1,018 out of 1,087 IWT workers are active.

The modal split share of IWT within total land-based transport performance is 28.7%, making IWT a core transport mode in this Middle Danube country.

**We wish you an enjoyable read!**

\* IWT: Inland Waterways Transport

\*\* IWW: Inland Waterways

### 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.*

### 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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