

# MARKET INSIGHT

## INLAND NAVIGATION IN EUROPE

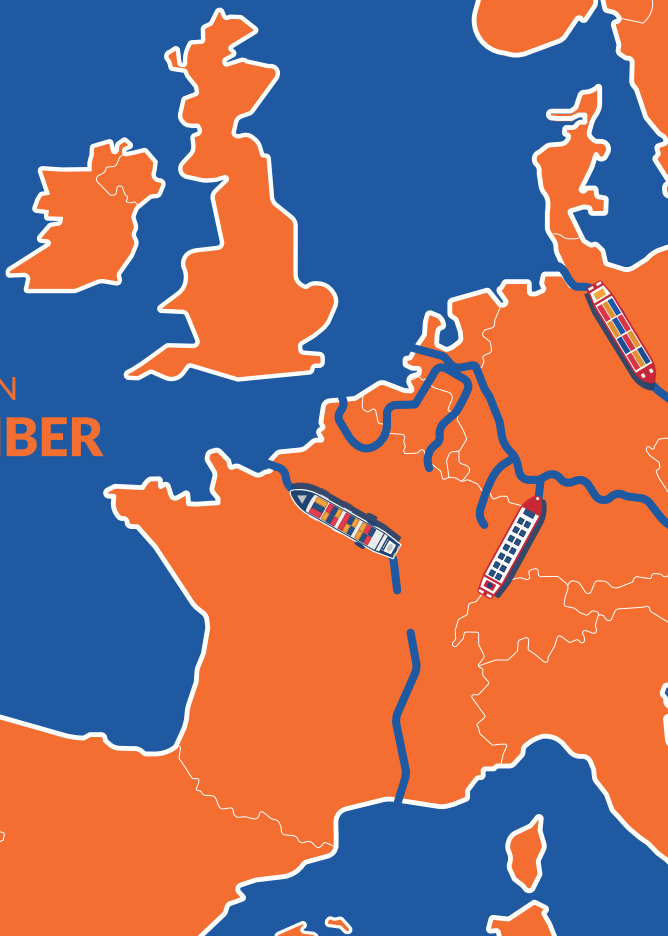


**CCNR**

CENTRAL COMMISSION  
FOR THE NAVIGATION OF THE RHINE



PUBLISHED IN  
**NOVEMBER**  
**2021**



**Market Insight**  
INLAND NAVIGATION IN EUROPE

Published in  
**November 2021**

Please find all our data at:  
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# 01

## FREIGHT AND PASSENGER TRAFFIC ON INLAND WATERWAYS

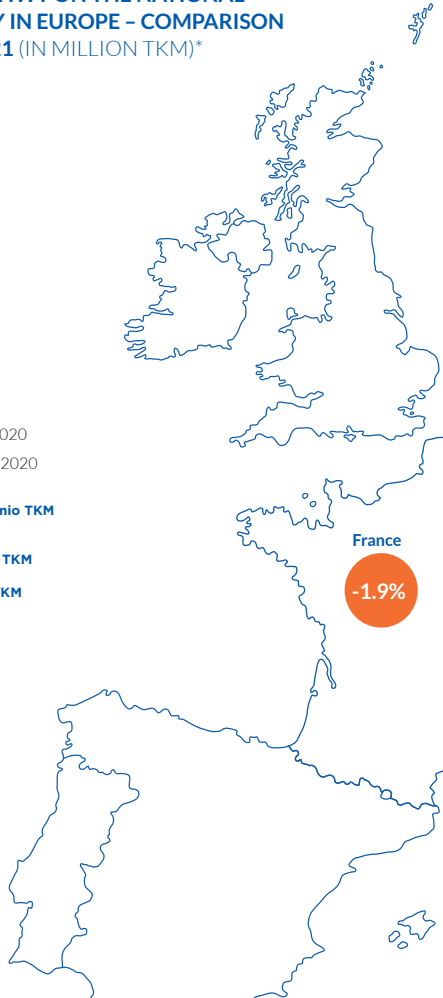
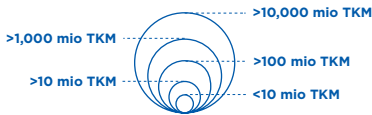
- Transport performance (TKM) on inland waterways in Europe (EU plus Switzerland, Serbia and Ukraine) increased by 4.0% in the first quarter of 2021 compared to the same period in 2020. For the different cargo segments transported on the Rhine, dry cargo saw an increase, whereas liquid cargo was slightly weaker in Q1 2021.
- Passenger transport, and more precisely river cruises, are struggling to recover with a continuous low level of cruise vessel traffic on the Upper Rhine (lock of Iffezheim). The number of vessels passing this lock dropped by 12.7% in the first half year of 2021 compared to the same period the previous year. The gap in (Q1+Q2) 2021 compared to (Q1+Q2) 2019 amounts to 94.9%.

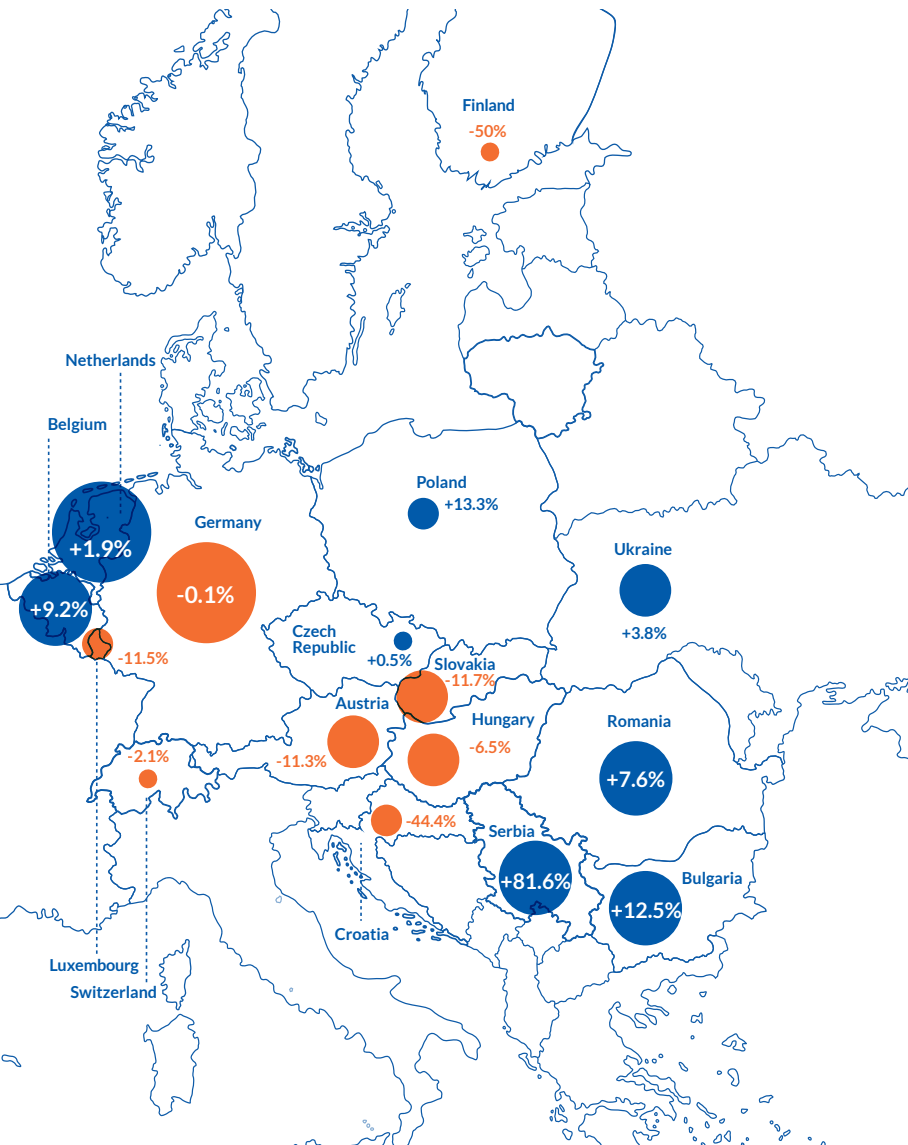
# TRANSPORT PERFORMANCE IN EUROPE

## TRANSPORT PERFORMANCE IN IWT ON THE NATIONAL TERRITORY OF EACH COUNTRY IN EUROPE – COMPARISON BETWEEN Q1 2020 AND Q1 2021 (IN MILLION TKM)\*

Sources: Eurostat [iww\_go\_qnave],  
OECD (Switzerland, Serbia, Ukraine)  
\* For the UK, data were not available.

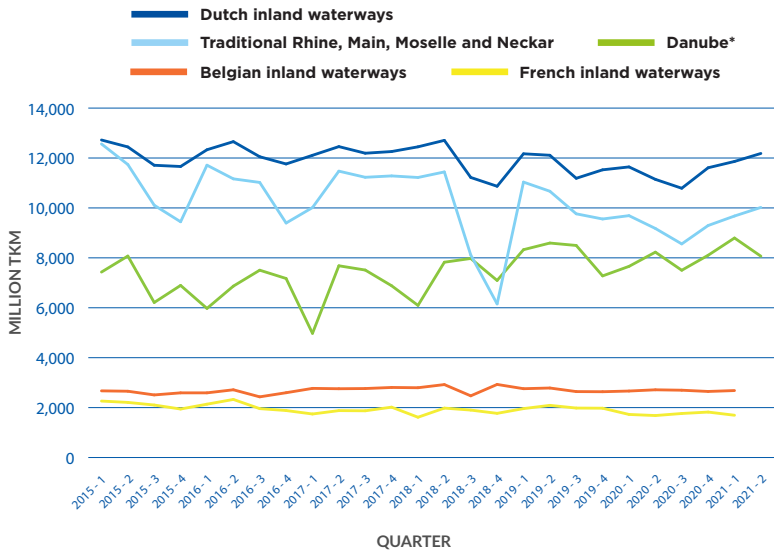
- Positive rate of change in Q1 2021 vs Q1 2020
- Negative rate of change in Q1 2021 vs Q1 2020





**FIGURE 1: INLAND WATERWAY TRANSPORT (IWT) PERFORMANCE IN EUROPE BY REGION AND QUARTER (IN MILLION TKM)**

Sources: Eurostat [iww\_go\_qnave], OECD (Ukraine), Destatis (Rhine and affluents)  
\* Danube = TKM in all Danube countries including Ukraine



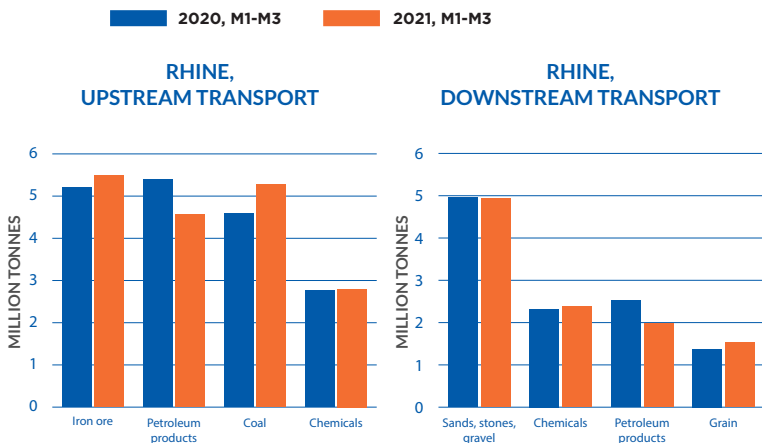
- After a period of decreasing transport performance (low waters in 2018, macroeconomic weakness in 2019, Covid crisis in 2020), cargo transport on the Rhine and on Dutch waterways started to recover between Q3 2020 and Q1 2021. More recent data (for the lock of Iffezheim on the Upper Rhine) point to an increase of 4.7% in transport volume during the first eight months of 2021, compared to the same period in 2020. However, the difference compared to the level in the first eight months of 2019 was still 6.9%.
- While transport performance in Belgium and France was rather constant, with some fluctuations, Danube navigation continued its upward trend.



## RHINE AND DANUBE NAVIGATION PER CARGO SEGMENT

FIGURES 2 AND 3: **RHINE TRANSPORT VOLUME UPSTREAM AND DOWNSTREAM FOR MAJOR CARGO SEGMENTS** (IN MILLION TONNES, FOR THE FIRST THREE MONTHS OF 2020 AND 2021)

Source: CCNR analysis based on Destatis



- Cargo transport on the traditional Rhine amounted to 42.7 million tonnes in the first quarter of 2021, compared to 42.5 million tonnes in the same quarter the previous year. The comparison shows that dry cargo had higher volumes in Q1 2021 than in Q1 2020, while liquid cargo (in particular petroleum products) had lower volumes.

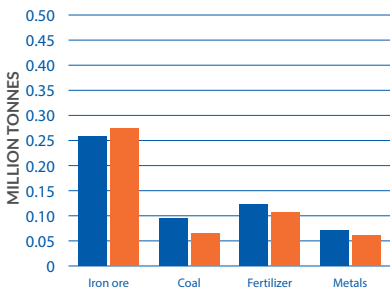
- These differences can be explained by the recovery of steel production and the increase of steam coal demand (because of high gas prices) in 2021, and the related increase in dry cargo transport of iron ore, coking coal and steam coal. Steel production in Germany was 15% higher in the first five months of 2021 compared to the same period in 2020. The drop in petroleum products is explained by a reduced mobility due to the pandemic. The future will show if this could become a structural phenomenon.

**FIGURES 4 AND 5: MIDDLE DANUBE TRANSPORT VOLUME UPSTREAM AND DOWNSTREAM FOR THE MAJOR CARGO SEGMENTS (IN MILLION TONNES, FOR THE FIRST THREE MONTHS OF 2020 AND 2021)\***

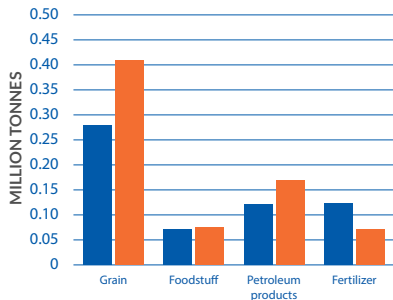
Source: Danube Commission market observation report  
\* On the Middle Danube at Mohács

■ 2020, M1-M3    ■ 2021, M1-M3

**DANUBE,  
UPSTREAM TRANSPORT**



**DANUBE,  
DOWNSTREAM TRANSPORT**



- Iron ore transport on the Middle Danube increased slightly in Q1 2021, reflecting also the recovery in the steel market which is relevant both for Rhine and Danube navigation. Furthermore, the upward trend in grain transport that occurred in 2020 continued on the Danube also in 2021.
- A certain balance of freight transport on the Danube was ensured by the transportation of significant volumes of grain from the ports of the Middle Danube in direction of the port of Constanța. At the same time, the cargo turnover of the port of Constanța by river traffic amounted to 4.1 million tonnes in Q1 2021, which was 15.3% higher than in Q1 2020. Accordingly, the transport volume on the Danube-Black Sea canal amounted to 4.37 million tonnes, which was 12.3% more than in Q1 2020.

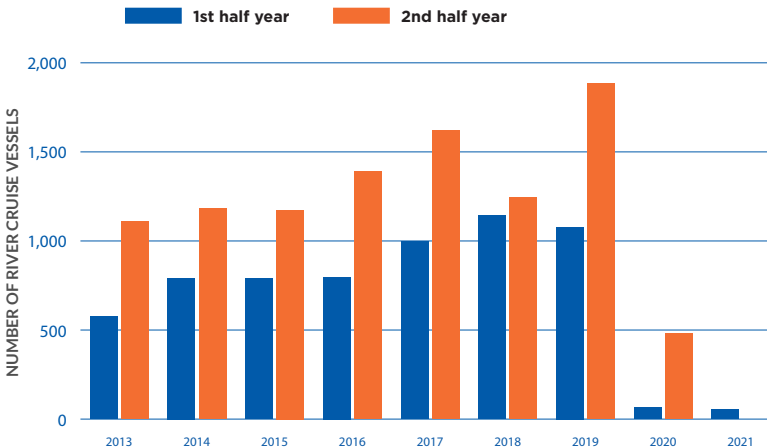


## ■ PASSENGER TRANSPORT

- The number of cruise vessels passing the lock of Iffezheim at the Upper Rhine is chosen as an indicator for passenger transport. Data on cruise vessels on the Rhine are an important indicator for the European cruise sector, as the Rhine enjoys the second highest cruising figures in Europe after the Danube.
- In the second half of 2020, cruising partly recovered, in parallel with a partial termination of lockdown rules. In the first half of 2021, however, figures dropped again to very low levels.

**FIGURE 6: NUMBER OF RIVER CRUISE VESSELS PASSING THE LOCK OF IFFEZHEIM AT THE UPPER RHINE PER HALF YEAR (FOR THE SECOND HALF OF THE YEAR 2021, DATA WERE NOT AVAILABLE)**

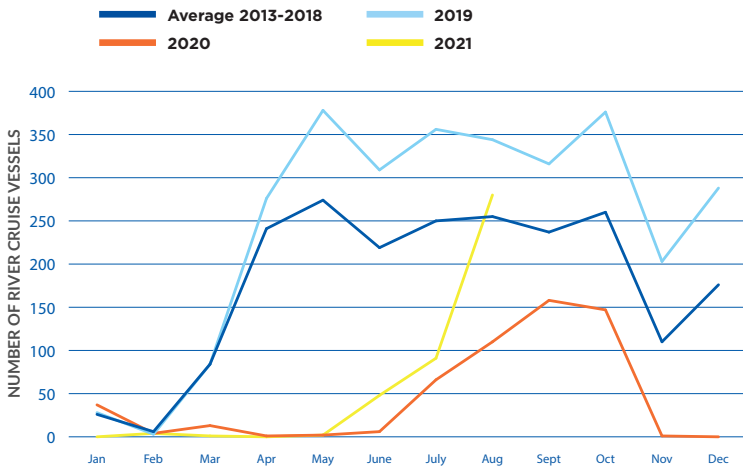
Source: German Waterway and Shipping Administration



- At the time of writing the report, figures were available until the month of August 2021. In this month, the number of cruise vessels passing the lock of Iffezheim increased sharply. However, it is far too early to consider this as a definite recovery in this market segment. Several indicators show that the pandemic is not yet over, so that a rebound of the crisis cannot be ruled out.

**FIGURE 7: NUMBER OF RIVER CRUISE VESSELS PASSING THE LOCK OF IFFEZHEIM AT THE UPPER RHINE PER MONTH**

Source: German Waterway and Shipping Administration



- In June 2021, a number of cruise vessel voyages took place on the Danube, operating to begin with at an average number of 115-125 passengers. In total, 13 vessel passages took place on the Upper Danube in June and 1,700 passengers were transported. In July the number of passages increased to 148, and in August to 330. At the same time, passenger transportation was renewed in the direction of the Danube Delta.



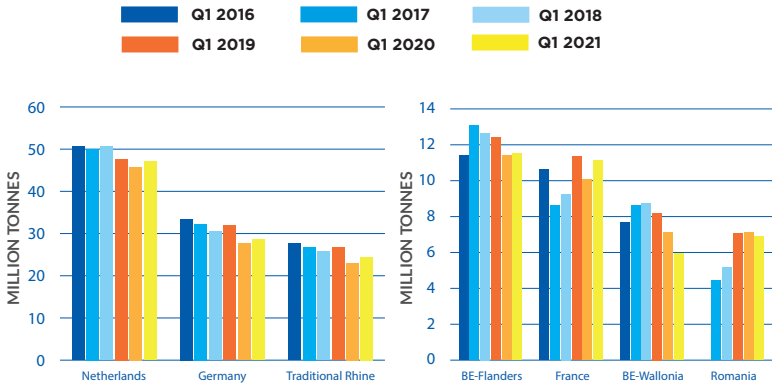


## DRY BULK, LIQUID BULK AND CONTAINER TRANSPORT

Sources: Eurostat [IWW\_GO\_QCNAVE], Destatis, Centraal Bureau voor de Statistiek, De Vlaamse Waterweg, SPW Service Public de Wallonie, Voies Navigables de France, Romanian Institute of Statistics

Note: For Belgium-Wallonia, infra-annual container statistics in tonnes are not available. The product group "machines/other goods" was assumed to consist mainly of container transport. The data contain total IWT on the territory of the country/region.

FIGURE 9: DRY CARGO TRANSPORT (IN MILLION TONNES)



**IN GERMANY, IRON ORE TRANSPORT INCREASED BY 22% IN Q1 2021 COMPARED TO Q1 2020, AND COAL TRANSPORT BY 25%. COAL TRANSPORT INCREASED AS A RESULT OF MORE COAL DEMAND IN THE WAKE OF HIGH GAS PRICES, WHILE IRON ORE TRANSPORT BENEFITED FROM A RECOVERY OF STEEL PRODUCTION.**



FIGURE 10: LIQUID CARGO TRANSPORT (IN MILLION TONNES)

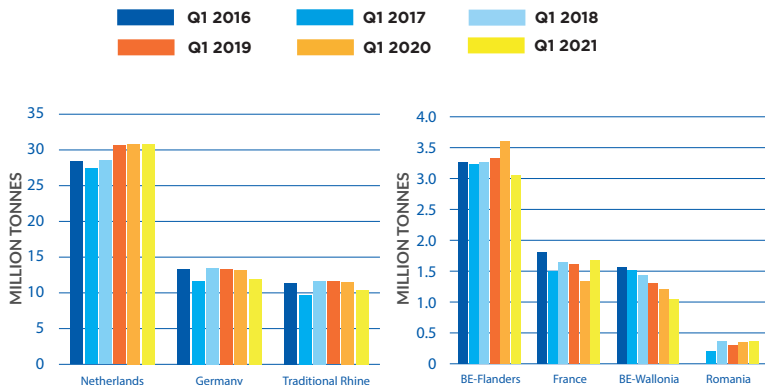
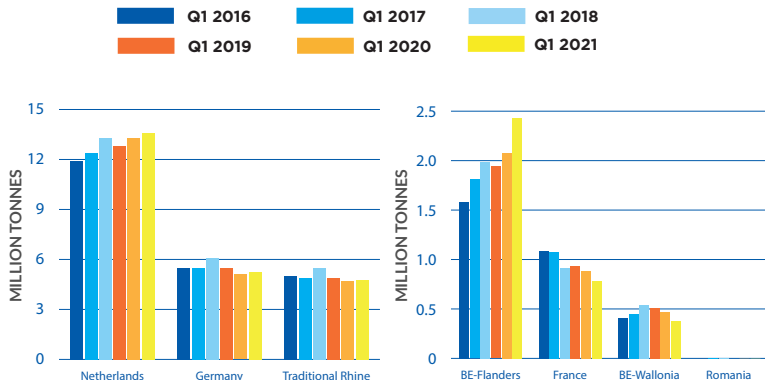


FIGURE 11: CONTAINER TRANSPORT (IN MILLION TONNES)





# 02

## OPERATING CONDITIONS

- Freight rates for dry cargo and container transport started on a limited upward movement from the second half of 2020 onwards. In the first half of 2021, this movement continued. For liquid cargo freight rates, however, no recovery can be gathered from the data.
- Both oil and fuel prices continued their upward trend in the first half of 2021. Fuel prices in IWT rose by 12.5%, from 45.29 €/100L in Q1 2021 to 50.96 €/100L in Q2 2021.
- Throughout the second half of 2021 and in 2022, fuel prices in IWT are expected to lie in the range between 54 and 60 €/100L. The basis for this outlook is oil price forecasts.

## ■ FREIGHT RATES IN THE RHINE REGION<sup>1</sup>

- In the first half year 2021, gasoil spot market freight rates within ARA-Rhine trade followed a negative trend. This was a continuation of the development that started after the low water period of 2018. One main driving force that puts a strain on freight rates is the ongoing pandemic with its negative influence on mobility and fuel demand. With regard to hydraulicity, freight rates were also not supported, as water levels were rather high, except for a period at the end of April. On the spot markets for oil products, rising prices also delivered negative influences on transport and freight rates. Finally, the term structure on future markets was orientated towards backwardation.

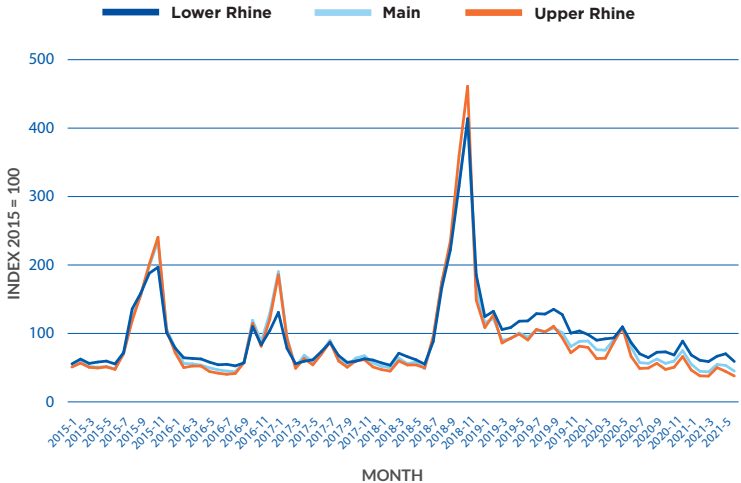
<sup>1</sup> For the Danube region, freight rate data for 2021 were not available.



**FIGURE 1: FREIGHT RATE EVOLUTION FOR GASOIL FROM THE ARA REGION TO RHINE DESTINATIONS (INDEX 2015 = 100)\***

Source: CCNR calculation based on PJK International

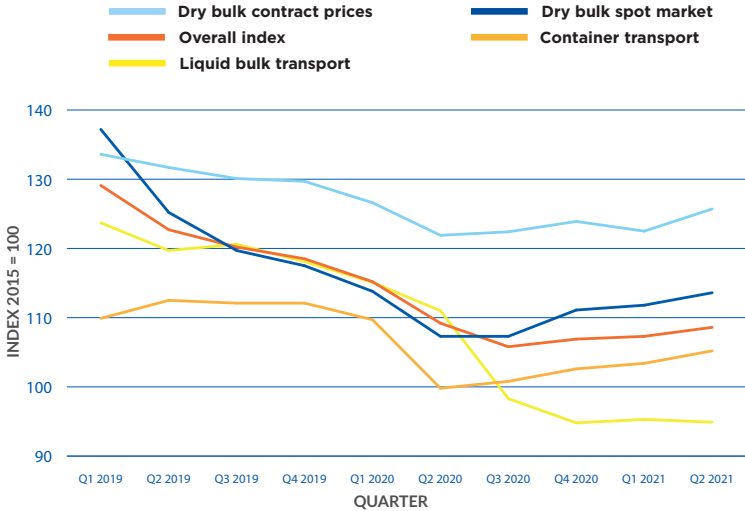
\* PJK collects freight rates (in Euro per tonne) for ARA-Rhine trade of liquid bulk. The CCNR transforms these values into an index with base year 2015. Lower Rhine: Duisburg, Cologne. Upper Rhine: Karlsruhe, Basel. Main: Frankfurt/M.



**SPOT MARKET FREIGHT RATES FOR LIQUID CARGO CONTINUED A DOWNWARD TREND IN THE FIRST HALF OF 2021. HEREBY, RISING OIL PRICES PLAYED A ROLE, AS THEY DAMPENED TRANSPORT DEMAND FOR LIQUID CARGO AND ALSO FREIGHT RATES.**

FIGURE 2: **FREIGHT RATE EVOLUTION PER QUARTER FOR DUTCH IWT COMPANIES ACCORDING TO MARKET SEGMENT**  
(INDEX 2015 = 100, QUARTERLY DATA)

Source: Centraal Bureau voor de Statistiek (Binnenvaartdiensten; prijsindex)



- Statistics Netherlands (CBS) collects freight rate data from a panel of Dutch IWT companies. These data are observed twice a quarter and include fuel and low water surcharges.
- The third quarter of 2020 seemed to be the period when transport prices for dry bulk and container transport stabilised. For subsequent quarters, an upward trend is seen. For liquid cargo, freight rates remained at a low level.
- In the absence of low water levels in the first half year 2021, freight rates were mainly influenced by transport demand. As chapter 1 has shown, transport demand for liquid bulk was decreasing somewhat, while dry bulk and container transport were upward orientated. The development of freight rates per cargo segment reflects these differing trends.

**SPOT MARKET FREIGHT RATES FOR DRY BULK AND FOR CONTAINER TRANSPORT STARTED TO RISE AGAIN FROM THE SECOND HALF OF 2020 ONWARDS. IN THE FIRST HALF YEAR OF 2021, THIS RECOVERY CONTINUED.**



## ■ FUEL COST EVOLUTION

- Fuel costs are analysed on the basis of gasoil/diesel prices published by the energy price monitoring system of the Belgian Ministry of Economic Affairs.<sup>2</sup> A comparison with oil prices reveals a very close correlation which serves as a basis for an outlook on fuel prices.
- In the course of 2021, oil prices – and therefore also fuel prices – continued to follow an increasing trend. Oil prices reached US dollars 68.8 in the second quarter of 2021 (approximately 57.3 Euro as the exchange rate was USD/EUR 1.20).

<sup>2</sup> The prices are maximum prices and valid for a purchase volume of at least 2.000 litres of gasoil.

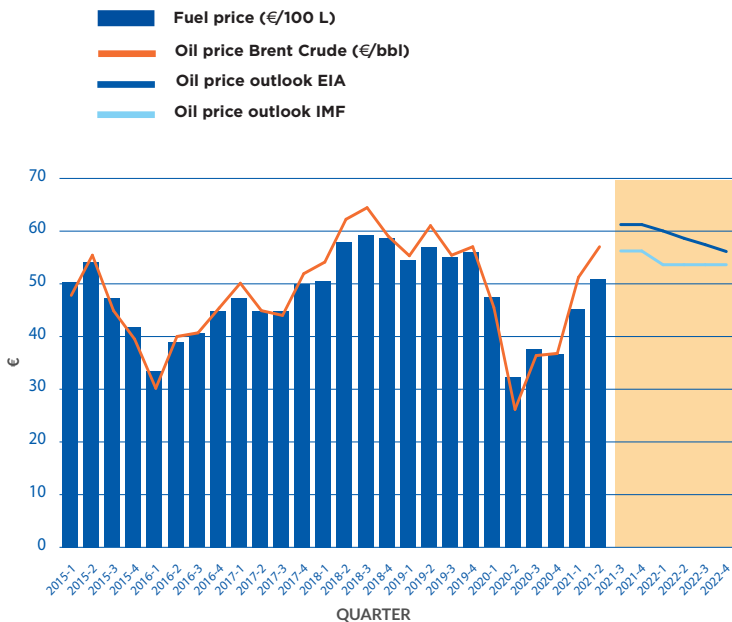




**FIGURE 3: AVERAGE FUEL PRICES ACCORDING TO THE BELGIAN MINISTRY OF ECONOMIC AFFAIRS AND BRENT CRUDE OIL PRICES INCLUDING FORECAST\***

Sources: ITB and SPF Economie (fuel price). US Energy Information Administration (oil price). Federal Reserve Economic Data (historical exchange rate US-dollar/euro). 1 barrel (bbl) = 159 litres

\* IMF = International Monetary Fund WEO Update July 2021; EIA = US Energy Information Administration. The forecast assumes a nominal exchange rate of 1.17 US dollars per euro throughout 2021 and 2022.



- The US Energy Information Administration (EIA) forecasts - in its latest short-term outlook from September 2021 - Brent crude oil spot prices to average around 72 US dollars per barrel in 2021, and around 66 US dollars per barrel in 2022, compared with an average of 41.8 US dollars in 2020. The IMF oil price outlook points to slightly lower values. This lies in different assumptions regarding the pace of economic recovery and the growth of oil production from OPEC countries and the US.<sup>3</sup>
- Fuel prices in European IWT are not only influenced by oil prices but also by the exchange rate between US dollars and euros. The depreciation of the US dollar towards the euro, starting in March 2020, continued until May 2021, reaching 1.22 US dollars per euro at the end of that month. This dampened fuel prices in European IWT. In August 2021, the euro lost some value compared to the US dollar due to a weak business cycle in Europe and settled at 1.17-1.18 US dollars per euro until September. It is expected that the European currency will not deviate much from this range throughout 2021 and 2022.<sup>4 5</sup>
- Based on this reasoning, fuel prices in IWT are expected to remain in the range between 54 and 60 €/100L throughout the rest of 2021 and in 2022.

<sup>3</sup> Source: US Energy Information Administration, Short-Term Energy Outlook, September 2021. Available at: <https://www.eia.gov/outlooks/steo/>. Oil price values in US-dollar are transformed to values in euro and depicted in the figure. The exchange rate for this transformation is 1.18 for Q1 2021 and 1.20 for Q2 2021 US-dollar per euro.

<sup>4</sup> Raiffeisen Währungsupdate 2021. Available at: <https://www.raiffeisen.ch/content/dam/www/rch/pdf/publikationen/waehrungsupdate/de/2021/waehrungsupdate-09-2021.pdf> (last consulted 10.09.2021)

<sup>5</sup> OECD, Nominal exchange rates against US dollar, average of daily rates. 2021. Available at: <https://stats.oecd.org/Index.aspx?QueryId=51653#> (last consulted 10.09.2021)



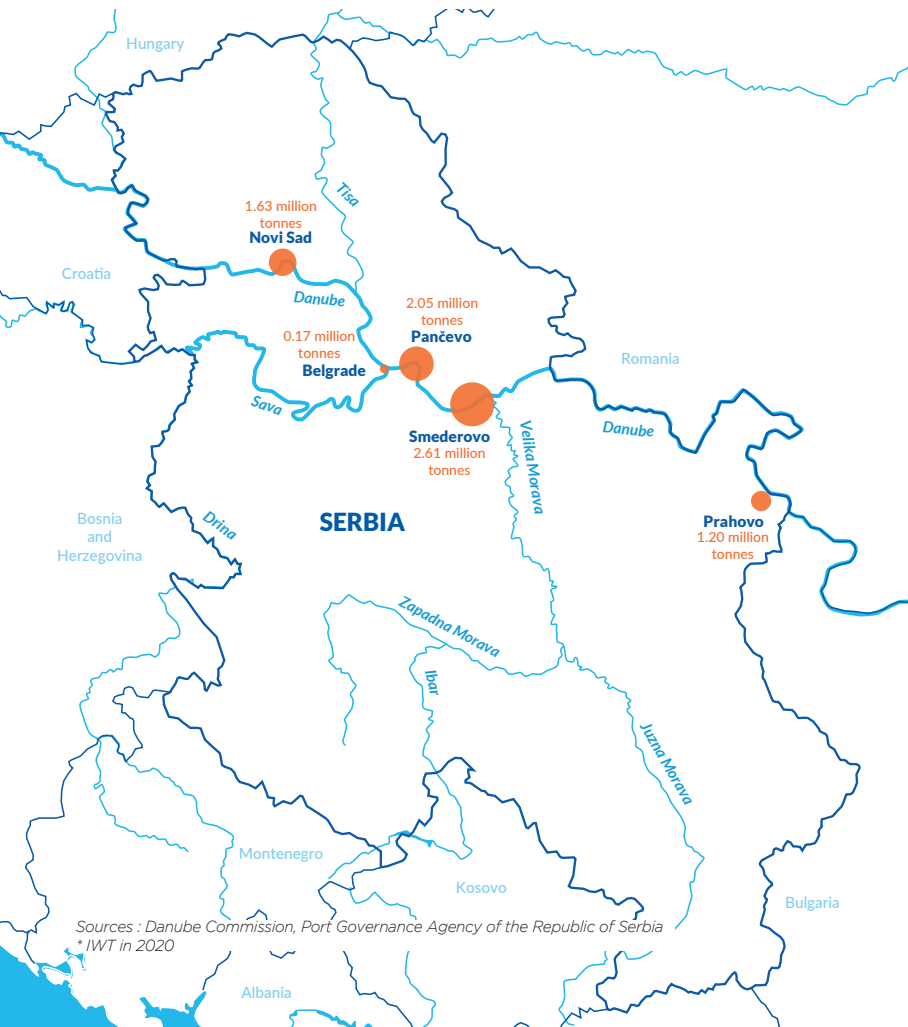


# 03

## FOCUS ON SERBIA

- Serbia is a middle Danube country where agricultural products, foodstuffs, iron ore and metals represent the core market segments in IWT. The production level of the Serbian steel industry has seen a boost in recent years due to foreign direct investment from China. Serbian IWT has benefited from these investments.
- Transport demand, as well as the company sector and employment in Serbian IWT are strongly focused on dry mass cargo transport. The Serbian fleet has a relatively high number of push boats, which reflects this focus on dry mass cargo, often transported by pushed convoys.
- The modal share of IWT is 28.7% in Serbia, strongly above the average of the EU.

## INLAND WATERWAY TRAFFIC IN SERBIAN PORTS\*



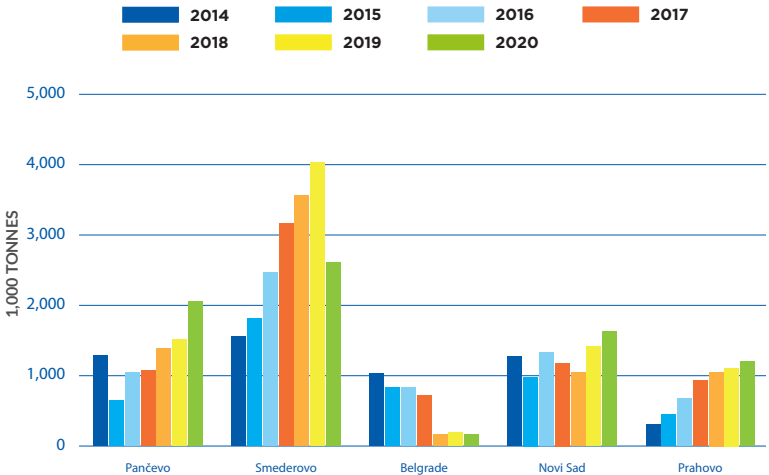
Sources : Danube Commission, Port Governance Agency of the Republic of Serbia  
\* IWT in 2020

## DEVELOPMENT OF INLAND WATERWAY TRANSPORT IN SERBIAN PORTS

- Among the five main Serbian ports, the port of Smederovo, in particular, has developed positively since 2014. While goods handling increased also in Pančevo, Prahovo and Novi Sad, the port in the Serbian capital Belgrade has lost large volumes of transport.

**FIGURE 1: YEARLY INLAND WATERWAY TRANSPORT OF MAIN SERBIAN PORTS (IN 1,000 TONNES)**

Sources : Danube Commission, Port Governance Agency of the Republic of Serbia



- In the first quarter of 2021, the total waterside cargo turnover of the Serbian ports amounted to 3.7 million tonnes, which was significantly higher than the volume of Q1 2020 (1.8 million tonnes).
- Inland waterway transport in Serbia, reflected by figures shown above on goods handling in ports, is mainly dominated by two economic sectors: the steel industry and the agricultural sector. In 2018 and 2019, steel production in Serbia was five times higher than in 2013. The reason for the surge between 2013 and 2018 is the takeover of the main Serbian steel plant in Smederovo by a Chinese steel company in 2016.<sup>6</sup>

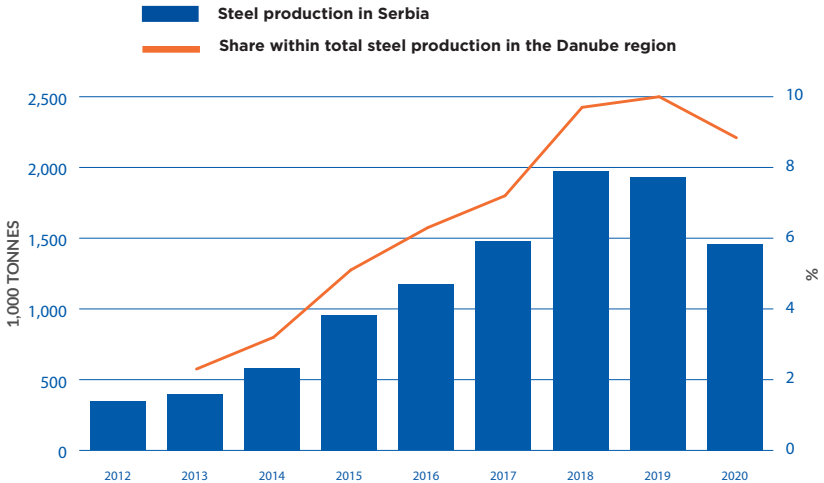
<sup>6</sup> Sources: 1) *Global Times (2021), Steel Plant: Source of Happiness for a City - a Model Project of the Belt and Road Initiative*; published on 6 September 2021. Available at: <https://www.globaltimes.cn/page/202109/1233480.shtml> (last consulted on 8 September 2021). 2) *New York Times (2017), As China Moves In, Serbia Reaps Benefits, with Strings Attached*, published on 9 September 2017. Available at: <https://www.nytimes.com/2017/09/09/world/europe/china-serbia-european-union.html> (last consulted on 8 September 2021)





**FIGURE 2: YEARLY STEEL PRODUCTION IN SERBIA (IN 1,000 TONNES) AND SHARE WITHIN TOTAL STEEL PRODUCTION IN THE DANUBE REGION (%)**

Sources : World Steel Association, CCNR analysis



- After acquiring the Smederovo steel plant, the Chinese company HBIS invested in its technical renovation, which resulted in a strong increase of steel production and raw material transport.
- The Danube in this section is now again used intensively for the delivery of raw materials (iron ore, coal), via the port of Smederovo. This explains the strong increase in inland waterway transport in the port and boosted Serbian IWT.
- It proves also the dependence of IWT upon traditional industries in the Danube region.

## FACT SHEET IWT IN SERBIA - ANNUAL FIGURES

Notes on the factsheet - See page 42

### ABSOLUTE VALUE<sup>7</sup> FOR SERBIA VS SHARE IN EU TOTAL

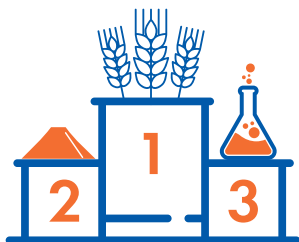
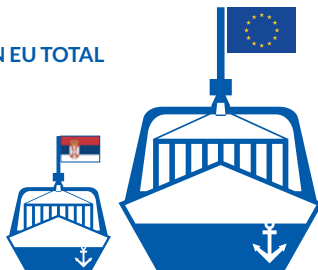
#### TRANSPORT PERFORMANCE TOTAL

4,225 million TKM

3.1% SHARE IN EU TOTAL

#### Volume of total goods transport:

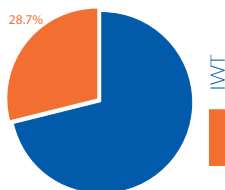
11.6 million tonnes



### MAIN GOODS SEGMENTS IN IWT

1. Agricultural products: 1,744 million TKM
2. Metal ores, sands, stones: 975 million TKM
3. Chemicals and chemical products: 580 million TKM

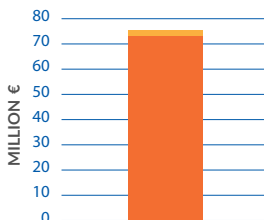
### MODAL SPLIT SHARE OF IWT WITHIN TOTAL LAND-BASED TRANSPORT PERFORMANCE



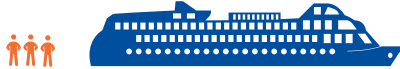
### LEVEL OF IWT TURNOVER

75.3 million €

- Goods transport: 73.3 million € **1.2% SHARE IN EU TOTAL**
- Passenger transport: 2.0 million €



<sup>7</sup> Data on transport demand are for 2020 and fleet data for 2017, the modal split, data on companies, data on employment and turnover for 2018.



### PERSONS EMPLOYED IN IWT

1,087	2.5%
Goods transport: 1,018	4.8%
Passenger transport: 69	0.3%

### NUMBER OF IWT COMPANIES

54	0.5%	Goods transport: 41
	0.7%	Passenger transport: 13
	0.3%	

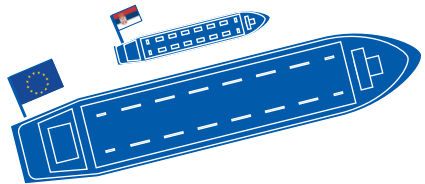
### NUMBER OF ACTIVE CARGO VESSELS

182 **1.2% SHARE IN EU TOTAL**

Dry cargo: 54 **0.5%**

Liquid cargo: 42 **2.5%**

Push and tug: 86 **3.2%**



### LOADING CAPACITY OF ACTIVE CARGO VESSELS

0.035 million tonnes

**0.21% SHARE IN EU TOTAL**

Dry cargo: 0.024 million tonnes

**0.18% SHARE IN EU TOTAL**

Liquid cargo: 0.011 million tonnes

**0.34% SHARE IN EU TOTAL**





## ■ GLOSSARY

**ARA REGION:** Amsterdam-Rotterdam-Antwerp

**BACKWARDATION:** describes a situation where the actual spot market price for a commodity is higher than the expected price in the future. In a backwardation situation, the future prices decrease proportionally in relation to the time prior to the expiry date of the future contract. In other words, the price decreases as the expiry date becomes more distant. Backwardation reflects the expectation of decreasing prices for a commodity, due to different influencing factors regarding the supply/demand ratio. The opposite of backwardation is contango.

**BN:** billion

**CENTRAL EUROPEAN WATERWAYS:** Rhine, Main, Main-Danube Canal, Danube, Elbe-Oder

**DANUBE COUNTRIES:** Austria, Bulgaria, Croatia, Hungary, Romania, Serbia, Slovakia

**EU:** European Union

**EUROPE:** European inland navigation in this report includes two countries that do not belong to the European Union, Switzerland and Serbia.

**FREIGHT RATE:** price at which a cargo is delivered from one point to another.

**IWT:** Inland Waterways Transport

**IWW:** Inland Waterways

**LOWER RHINE:** section of the Rhine which flows from Bonn, Germany, to the North Sea at Hoek van Holland, the Netherlands.

**MIDDLE DANUBE:** stretch of the Danube from Devín Gate, at the border between Austria and Slovakia, to the Iron Gates

**MIO:** million

**MODAL SPLIT SHARE:** the percentage of inland waterway freight transport performance (in TKM) within total land-based transport performance. Land-based freight transport modes include road, rail and inland waterways.

**RHINE COUNTRIES:** Belgium, France, Germany, Luxembourg, the Netherlands, Switzerland

**TEU:** Twenty-foot Equivalent Unit

**TKM:** Tonne-Kilometre (unit for transport performance which represents volume of goods transported multiplied by transport distance)

**TRADITIONAL RHINE:** section of the Rhine from Basel to the border between Germany and the Netherlands

**TURNOVER:** sales volume net of sales taxes

**UPPER RHINE:** section of the navigable Rhine in the Upper Rhine Plain between Basel in Switzerland and Bingen in Germany

## NATIONAL STATISTICS OFFICES

Acronym	Original Name	English Name	Country
CBS	Centraal Bureau voor de Statistiek	Central Statistical Office	Netherlands
Destatis	Statistisches Bundesamt	Federal Statistical Office of Germany	Germany
INSSE	Institutul Național de Statistică	National Institute of Statistics	Romania
RBS	Републички завод за статистику Србије	Statistical Office of the Republic of Serbia	Serbia

## BOOKS, JOURNAL ARTICLES AND STUDIES

Original Name	Country
Global Times (2021), Steel Plant: Source of Happiness for a City – a Model Project of the Belt and Road Initiative; published on 6 September 2021. Available at: <a href="https://www.globaltimes.cn/page/202109/1233480.shtml">https://www.globaltimes.cn/page/202109/1233480.shtml</a> . Last consulted on 8 September 2021.	China
New York Times (2017), As China moves in, Serbia reaps the benefits, with strings attached, published on 9 September 2017. Available at: <a href="https://www.nytimes.com/2017/09/09/world/europe/china-serbia-european-union.html">https://www.nytimes.com/2017/09/09/world/europe/china-serbia-european-union.html</a> . Last consulted on 8 September 2021.	USA
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US Energy Information Administration, Short-Term Energy Outlook, September 2021. Available at: <a href="https://www.eia.gov/outlooks/steo/">https://www.eia.gov/outlooks/steo/</a>	USA



## ■ OTHER SOURCES

Original Name	English Name	Country
Agencija za upravljanje lukama	Port Governance Agency of Serbia	Serbia
CCNR/ZKR/CCR	Central Commission for the Navigation of the Rhine (CCNR)	Europe
De Vlaamse Waterweg	Waterways in Flanders	Belgium
Donaukommission	Danube Commission	Europe
EUROSTAT	EUROSTAT	EU
Federal Reserve Economic Data	Federal Reserve Economic Data	USA
International Monetary Fund (IMF)	International Monetary Fund (IMF)	World
ITB – Institut pour le Transport par Batellerie/ Instituut voor het Transport langs de Binnenwateren	Institute for transport by skippers	Belgium
Organisation for Economic Co-operation and Development (OECD)	Organisation for Economic Co-operation and Development (OECD)	World
PJK International	PJK International	Netherlands
Ports mentioned in the report	Ports mentioned in the report	Europe
SPF Economie	Federal Public Service Economy	Belgium
SPW Service Public de Wallonie	Public Service of Wallonia	Belgium
US Energy Information Administration	US Energy Information Administration	USA
Voies Navigables de France (VNF)	Navigable Waterways of France	France
Wasserstraßen-und Schifffahrtsverwaltung des Bundes (WSV)	German Waterway and Shipping Administration	Germany
World Steel Association	World Steel Association	World

## ■ NOTES ON THE FACTSHEET

'Share in EU total' contains figures for the EU plus Switzerland and Serbia.

*#) In contrast with transport performance, for transport volume, a country-specific share cannot be calculated.*

*The modal split share is defined as the percentage of inland waterway freight transport performance (in TKM) within total land-based transport performance. Land-based freight transport modes include road, rail and inland waterways. The road freight activity is reported according to the territoriality principle, where international road freight transport data are redistributed according to the national territories of where the transport actually takes place. These principles are implemented in the Eurostat series [tran\_hv\_frmod].*

## ■ METHODOLOGY

### **Freight traffic on inland waterways and in ports**

Europe as defined in chapter 1 is taking into account all European countries providing quarterly data on inland waterway transport. All these countries are listed on the Transport Performance in Europe map (page with map in chapter 1).

When discrepancies on total transport performance are observed between Eurostat and National Statistics data, the information is notified to Eurostat and to the National Statistics Office, and Eurostat data is taken into account.

When available, NST product classification is used in order to split transport performance on following transport segments: dry cargo, liquid cargo, containers.

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## **CONTRIBUTORS**

### **CCNR**

**Norbert KRIEDEL** (Economist)

**Laure ROUX** (Project coordination)

**Athanasia ZARKOU** (Junior economist)

**Lucie FAHRNER** (Communication officer)

**Sarah MEISSNER** (Project assistant)

Contact: [ccnr@ccr-zkr.org](mailto:ccnr@ccr-zkr.org)

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## **TRANSLATION**

**Laurence WAGNER** (French)

**Barbara VOLLATH-SOMMER** (German)

**Pauline de ZINGER** (Dutch)

**Veronica SCHAUINGER-HORNE** (Proofreading English)

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