

## CCNR WEEKLY NEWSLETTER – N°6

### Rhine navigation in the context of COVID-19

*Given the exceptional situation in relation with the COVID-19 pandemic, as well as its impacts on the Rhine and European navigation, the Central Commission for the Navigation of the Rhine (CCNR) wishes to share relevant information via a “Weekly newsletter”. This newsletter will be published every week on the [CCNR dedicated webpage](#) “Information regarding Rhine navigation in the context of COVID-19”.*

#### **Impact of COVID-19 on IWT goods transport, based on some available ports data for the first quarter 2020 compared to the same period in 2019** (IWT: Inland Waterway Transport)

The Swiss Rhine Ports reported a 20% reduction in goods transport. This result is explained partially from the effects of the pandemic but also from the very strong first quarter of 2019. Over the same period, the Port of Strasbourg reported a drop of 10.6% (-8,4% for liquid cargo and -13,4% for dry cargo) and the Ports of Mulhouse-Rhin a 7.8% reduction. On the river Rhône, goods transport volumes have been impacted particularly since mid-March 2020 (-70.3% in March 2020 compared to March 2019).

#### **Dry cargo**

##### **a) Agricultural products / food and feedstuff**

The Swiss Rhine Ports reported a decrease of 41.5% in agricultural products in the 1st quarter of 2020 compared to the same period in 2019, due to a severe reduction in February and March. In the case of food and animal feedstuff a 19% reduction was observed. This can mainly be explained by the fact that arrivals from China and departures to the Asian region were delayed/stopped, affecting both imports and exports. Cereals also suffered from reduced transport volumes. In the Haropa Ports (Le Havre, Paris, Rouen), the transport of cereals remained quite high. Over the same period, a reduction can be observed in the Ports of Mulhouse-Rhin regarding food products (-16%). In Strasbourg, transport of food products was more or less equal compared to the 1<sup>st</sup> quarter of 2019.

##### **b) Iron, steel and non-ferrous metal**

In general, this market segment was rapidly affected by the crisis, particularly due to the closure of industrial sites having recourse to this type of goods. Iron ore, steel and coking coal account for around 25% of all volumes transported on the Rhine. In the Swiss Rhine Ports, the imports of iron, steel and non-ferrous metals showed rather a positive trend from January to March 2020. However, exports fell to extremely low levels in February and March 2020 compared to 2019 (-65,8%). This is a direct effect of the confinement measures due to the COVID-19 crisis and mainly the closure of car factories in France and Italy. Over the same period, a sharp reduction in transport of metal products (-30%) was also reported for the Ports of Mulhouse-Rhin. In Strasbourg, metal products increased by 21.4% in the first quarter of 2020, but started to fall in March 2020.

##### **c) Stone, sand, gravel and building materials**

With the closure of main building sites throughout Europe and of relevant production sites (e.g. concrete plants in France), the building material segment was severely impacted, however to a different extent depending on the region. The Swiss Rhine Ports reported a reduction of 13.6% for the building material segment for the first quarter 2020 (compared to the same period in 2019) while on average all other groups recorded a decline of 18.4%. In March 2020, this segment increased by 44.1% compared to the same period in the previous year.

In France, in the first quarter 2020, this market experienced a brutal slowdown in March and April with the closure of main building sites. The Haropa Ports reported a large decrease of activities in this segment (while it had been on the rise for several months driven by the Grand Paris Express project). With the decision to gradually re-open those sites in May, transport of building materials is expected to pick up again. In the Port of Strasbourg, the effects were also severe, but to a lesser extent, with a drop of 31% in March 2020.

## **Liquid cargo**

### **a) Mineral oil products**

Mineral oil products were immediately hit by the crisis with the slowing down/full stop of transport mobility in Europe. Indeed, the COVID-19 effects on this goods segment are manifold due to the almost complete grounding of global aviation and limitations for other transport modes. Demand for aviation fuel has been stalled. In the petrol and diesel market, a reduction of at least 30% in transport volumes can be seen.

- In Switzerland, in the 1st quarter 2020, the Swiss Rhine Ports reported a 14.7% decline in liquid fuel imports, however this is not only explained by the COVID-19 crisis but also by the very good results for liquid fuel imports in the same period in 2019 and the fact that the winter of 2019/20 was relatively mild. For exports, the situation is however very negative with a 77.7% reduction.
- In France, in the 1st quarter of 2020, the Ports of Mulhouse-Rhin have also seen a reduction in transport of petroleum products (-7%) compared to 2019 and the Port of Strasbourg reported a 4.7% reduction in the transport of mineral oil products. The Haropa Ports reported that the temporary limitation of refining capacity had a negative impact on this goods segment in this same period.

### **b) Chemicals and fertilizers**

The Swiss Rhine Ports reported that export volumes of chemical products halved in the first quarter of 2020 (compared to the same period in 2019) and that imports decreased by one third. However, the development for this transport segment was extremely volatile. A 30% reduction in transport of both chemicals and fertilisers was also observed in the Ports of Mulhouse-Rhin over the same period. Strasbourg reported a 18.8% reduction for both as well.

### **c) Containers**

Container transport in Europe was not spared by the crisis, however, was hit with a certain delay compared to the dry and liquid cargo segments. For container transport, the full effects of the crisis have started to be felt from the end of March onwards, when containers arrived in reduced volumes in European seaports, from Asia, trade route on which this container segment is highly dependent.

In the 1st quarter of 2020, in the Swiss Rhine Ports, the effects of the lockdown were already noticeable in this period, particularly for the export side, while imports remained rather at the same levels. However, the situation was different regarding transport of empty containers, an essential segment to regulate and ensure that transport between inland and seaports can take place, which recorded a 12% reduction for import and a 33% reduction for exports.

For the Port of Strasbourg, while an increase in containers was observed in the 1st quarter of 2020 overall, less containers were handled in March 2020 compared to 2019. This decrease is expected to continue in the coming months. A similar trend was also observed in the Port of Rotterdam. The Haropa Ports reported that container transport on the Seine decreased by 13.5% and that the COVID-19 effects started to be felt from mid-March onwards. On the river Rhône, container transport (in EVP) decreased by 73.7% in March 2020 and by 27.2% in April 2020 compared to the previous year.

*(Sources: Ports' data mentioned)*

### **Record 1st quarter for the Port of Zeebrugge despite the COVID-19 crisis, but stronger impacts expected in April**

The Port of Zeebrugge achieved the best quarterly results in its history at the end of March 2020:

- 14.39 million tonnes (Mt) of transhipped volumes, an increase of 1/3 compared to the first three months of 2019.
- Dry bulk contributed to the quarterly record by increasing by 35.7% (to 372,000 tonnes).

The upturn in container activity was confirmed, with a growth of 15.9% in volume (to 4.43 Mt) and 11.1% in TEU (Twenty-foot Equivalent Unit).

However, Ro-Ro traffic fell by 12.1% (to 3.82 Mt) and new car traffic fell by 15.6% (to 660,134 units). This is partially due to the COVID-19-crisis, as many automobile producers halted their production in March 2020. The activity of workshops and dealers also declined, meaning the demand for new cars came to a standstill.

Already in the 1st quarter and mainly from mid-March onwards, the COVID-19 crisis could be felt in the passenger movements. Cruises are now interrupted.

Since April 2020, the COVID-19 crisis seems to have a greater impact for Zeebrugge, in particular container traffic, which is expected to be more heavily affected by port cancellations. Moreover, the Ro-Ro sector is likely to suffer from the slowdown in the British economy.

Situation in the other Benelux ports in comparison:

- The Port of Rotterdam saw maritime traffic decrease by 9.3% (to 112.4 Mt).
- North Sea Port (Ghent, Vlissingen and Terneuzen) recorded a fall of 6.6% (to 16.7 Mt).
- The Port of Antwerp remained on an upward trend, gaining 4% (to 59.1 Mt).

In general, it can be said that the impact of the crisis during the first quarter remained fairly limited for those ports. However, it will become more apparent in the second quarter with cancelled departures, large sectors of industry such as the car industry in western Europe being shut down, and changing patterns of consumer behaviour.<sup>1</sup>

(Source: NPI, [Trimestre record pour Zeebrugge en dépit de la crise du Covid 19, 05/05/2020](#))

### **Good practice for safe working conditions**

The *Berufsgenossenschaft für Verkehr (BG-Verkehr)* is a German public entity uniting social partners at national level, striving for safe working conditions and providing an insurance system for accidents related to work in several modes of transport. *BG-Verkehr* published an advice for preventing and dealing with COVID-19 dangers in IWT. Answers to frequently asked questions can be found on:

<https://www.bg-verkehr.de/coronavirus/tipps-fuer-unternehmen-und-ihre-beschaefigten>

Most recently, *BG-Verkehr* experts also worked on hygiene concepts for safe working procedures in freight and passenger transport. The concept for ferries, cabin cruises and day trip vessels is based on a sound risk assessment that has to be carried out before passenger transport can resume. A concrete list of measures can serve as a model for good practices, for crews on board passenger vessels that now have to work under conditions influenced by COVID-19 risks. The concept deals with personal hygiene, crew (inter-)action, communication, end of shifts, access to the vessel, serving guests and having contact with external service providers. *BG-Verkehr* experts also work on a short list of most important “do’s and don’ts” that shall be presented in the form of pictograms, when accessing the vessel.

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<sup>1</sup> Port of Antwerp: <https://newsroom.portofantwerp.com/port-of-antwerp-experiences-growth-in-first-quarter>;  
North Sea Port: <https://en.northseaport.com/north-sea-port-sees-decline-in-cargo-transshipment-in-first-quarter>

### **Impact of the COVID-19 crisis on a specific segment of passenger transport**

A specific French and Dutch market segment in the passenger transport sector is the segment of small historic cruise vessels with a bed capacity below 20 or even 10 beds. These are luxury hotel-cruise vessels whose main clients are US-Americans. The segment is therefore under threat from the COVID-19 crisis. The bookings for such vessels are normally done one year in advance. But this year, the owner of one of these vessels, *the Espérance*, sailing normally on the Canal du Midi with a staff of five persons, and 10-20 passengers, reports that there is so far no booking from US-Americans for the year 2021. He expects that, beyond the year 2020 which will be lost, the 2021 season will be affected too. Despite receiving a loan from the French state to avoid bankruptcy, this may still materialise if US-Americans do not make any bookings for a too long period of time. This confirms the importance of overseas tourists for the river passenger transport in Europe. (Source: NPI, [Un savoir-faire français menacé de disparition](#), 30/04/2020)

In Strasbourg, the number of passengers decreased by 94% in March for the day-trip company operated by BATORAMA (and owned by the Port of Strasbourg). This figure did not reach 100% as some vessels were still navigating at the beginning of March. However, a 100% reduction is expected for the coming months until restriction measures come to an end.

(Source: Port's figures, first quarter 2020)

For more information on passenger transport, please also refer to the CCNR weekly newsletter n°5: [https://www.ccr-zkr.org/files/documents/covid19/20200428\\_CCNR\\_Weekly\\_newsletter\\_5.pdf](https://www.ccr-zkr.org/files/documents/covid19/20200428_CCNR_Weekly_newsletter_5.pdf)

### **Construction sites in France are gradually starting up again**

The gradual resumption of construction sites (to date, 7 out of 150) in the region of Paris since 20 April 2020 (major infrastructure projects in the Paris Region such as the Grand Paris Express and the Eole worksite –which consists of extending the RER E to the west – and projects on the Haropa-Ports of Paris port network) has led to a slow resumption of river transport of construction materials and excavated material.

Indeed, construction materials is an important sector for river transport as it reached 15.6 Mt in 2019 (+ 14% compared to 2018). For instance, the Grand Paris Express construction sites have integrated river transport into their logistics chains to supply building sites with materials and remove excavated material.

Moreover, Voies navigables de France (VNF) signed a partnership with the Société du Grand Paris in 2019 to promote the use of river transport: out of the 45 Mt of excavated material to be disposed of, more than 8.5 Mt should be transported by waterway. In 2020, before the health crisis, the Société du Grand Paris planned to use river transport for between 1.5 and 2 million tonnes.

(Source: NPI, [Les chantiers du BTP redémarrent progressivement](#), 07/05/2020)

*Keep safe and healthy!*

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### **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.