THE CCNR PUBLISHES ITS MARKET INSIGHT/FALL 2018

Excutive Summary

Overall, transport demand in the European inland shipping industry has enjoyed an upward trend during the first half 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 11% 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.

MARKET INSIGHT

INLAND NAVIGATION IN EUROPE

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We wish you an enjoyable read!