

THE CCNR PUBLISHES ITS MARKET INSIGHT 2025

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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 or viewed directly online at <https://inland-navigation-market.org/>.

EXECUTIVE SUMMARY

In the first half year of 2024, transport demand in the two largest Rhine countries (the Netherlands and Germany) fell below the results observed one year earlier (-1.4 % for Germany and -2.7 % for the Netherlands). This was notably the case for the large dry bulk segment, while the results for liquid cargo were slightly higher than the previous year.

Freight transport on the entire Rhine (from Basel to the North Sea) amounted to 143.11 million tonnes in the first half year of 2024, compared to 145.36 million tonnes in the same period of 2023. This represented a decrease of -1.5%. The main reason for this decline was the reduction of dry bulk transport by -7.8%, reaching 63.28 million tonnes.

Within dry bulk, two goods segments were mainly responsible for the decline: coal, as well as sand, stones and building materials. While coal transport still followed an upward trend in 2022 due to the effects of the energy crisis, these effects disappeared in 2023 and 2024. Accordingly, the significant downward trend in coal transport, which had already started in 2013, and which was only interrupted for two years, continued. It had a strong impact on the overall development of dry bulk. Liquid bulk, driven by chemicals and mineral oil products, increased its transport volume by +5.4%, reaching 55.6 million tonnes. Container transport experienced a small decline of -1.3%, resulting in a transport demand of 14.6 million tonnes.

Even if the volumes per half year were lower in 2024 than in 2023, a recovery of Rhine transport can be observed. Indeed, waterside goods handling in main Upper Rhine ports followed an upward trend in the first six months of 2024, after a low point in late 2023. This upward movement continued also in the third quarter of 2024, and points to a recovery of Rhine transport in the course of 2024.

In most Danube countries, the first half year of 2024 saw a double-digit growth in transport demand. This was above all influenced by higher harvest results compared to 2023. Transport demand in the two largest Danube countries, Romania and Bulgaria, grew by 21.5% and 33.9% respectively.

In passenger transport, a small increase was observed for cruise vessel traffic on the Rhine, while this decreased on the Danube. Despite the lower number of cruise vessels passing locks on the Danube, the capacity utilization of river cruise vessels on the Danube was higher than in 2023, and almost as high as in the pre-pandemic year of 2019.

Freight rates for transport of all kinds of cargo experienced a downward trend in the first half year of 2024. This was particularly visible in the case of dry bulk transport and to a lesser extent for liquid bulk and container transport.

Average fuel prices in inland navigation decreased during the first half of 2024. For the rest of 2024 and for 2025, a further downward trend of fuel and oil prices is foreseen. The downward trend of oil prices is explained by an expected appreciation of the US dollar compared to the euro, which makes crude oil purchases more expensive for European consumers, thereby lowering the demand and the price for oil.

The third chapter of the report contains a focus on Bulgaria, the second largest Danube country behind Romania. Within the waterside cargo volumes, agricultural products have the highest share. Together with iron ore, they represent almost half of all transport demand. In the first half year of 2024, transport demand was on an upward trend in Bulgaria.

An important characteristic of inland waterway transport in Bulgaria is the high share of transit traffic (74% on average between 2014 and 2023) which is explained by the trading routes for agricultural products and iron ore on the Danube.

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.

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 thematic reports, 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.



CCNR

CENTRAL COMMISSION
FOR THE NAVIGATION OF THE RHINE

Palais du Rhin

2, place de la République - CS10023
F - 67082 Strasbourg Cedex

Tel. +33 (0)3 88 52 20 10

Fax +33 (0)3 88 32 10 72

ccnr@ccr-zkr.org

www.ccr-zkr.org