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Inland Shipping Data in Market Monitoring

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Overview Main Areas of Market Observation

1) Transport Demand

2) Transport Supply

3) Microeconomic Issues (Costs, Freight Rates, Turnover)

4) Inland Navigation Labour market

5) Modal Split
Overview Sources of Market Observation

1) Transport Demand

Data for transport demand...

- National Statistical Offices

- National Shipping Authorities (also regional data)
  Austria: Via Donau
  France: Voies Navigables de France
  Germany: Wasserschifffahrtsdirektionen

- International organizations
  Eurostat
  ITF/OECD
Goods Transport in Inland Navigation – Danube Countries

Sources: National Statistical Offices
Data for Transport Demand – Problems and Limitations

1) No actual transport statistics for certain countries (e.g. Belgium, Netherlands)

2) Transit Traffic sometimes not included in official data.

Alternative: Estimations based on ...

• Inland Port Statistics

• Sea Port Statistics (overall traffic / hinterland share / modal split share of IWT)
3) Eurostat Change from NST/R goods classification to NST 2007

Loss of information

New goods categories are often not well specified for market observation

Example:

**Old Classification:** (NST/R)
Code 11: Iron Ore, Metal Wastes         …. Steel segment
Code 15: Sand & Gravel                 …. Construction segment

**New Classification:** (NST 2007)
GT 03: Ores, Sand & Gravel, other mining materials   …. Both segments
Data for Transport Demand – Problems and Limitations (II)

Eurostat Change from NST/R goods classification to NST 2007

Possible solution of the Problem:

Harmonisation of NST 2007 on 3 digits at a European level

all countries shall be obliged to produce statistics at this degree of detail
Transport Ores and Metal Wastes (Rhine)

Steel Production = Reference Series

Sources: German Statistical Office; Eurofer. German Steel Production
Overview Sources of Market Observation

2) Transport Supply

Data for fleet statistics...

- National Statistical Offices
- International Ship Registers (IVR)
- Ministries of Transport

Problems/Limitations:

- Sometimes two different sources for one country
- Problems of actuality in some countries
- Active / Inactive fleet: Some sources contain inactive ships
Tanker Shipping in Western Europe – Comparison of Supply and Demand over time

Source: Calculation CCNR based on data for tanker fleets in Belgium France, Germany, Netherlands, Luxemburg (source: IVR)
Overview Sources of Market Observation

3) Microeconomic Indicators

• **Cost Structure and Evolution of Costs**  
  *sources: shipping industry associations*

• **Freight Rates**  
  *sources: surveys of shippers*

• **Turnover**  
  *calculations CCNR for dry cargo market / tanker shipping based on freight rates and transport volumes of the whole industry*
Freight Rates in Tanker Shipping on the Rhine
(Gasoil freight rates)

Source: PJK International
Freight Rates in Tanker Shipping and Water level

Source: PJK International; Bundesanstalt für Gewässerkunde
Freight Rates, Transport Demand and Turnover (Tanker shipping)

Source: CCNR
Overview Sources of Market Observation

4) Labour Market Issues

Data sources for employment studies in inland shipping ...

- **National Statistical Offices** (for overall employment and employment in sub-markets, wages, etc.)

- **National Social Security Organizations**
  (for employment according to age groups, number of foreign personnel, number of female and male employees, etc.)

- **Social Security Organizations for self-employed**
  (for number of self-employed inland shippers)
Employment in Dutch Inland Navigation
(fte = full time equivalents)

Source: CBS
Age Structure in Belgian Inland Shipping

Source: ONSS / INASTI
Employment in German Inland Shipping

Source: German Statistical Office
Thank you very much for your attention.

Merci beaucoup pour votre attention.
Vielen Dank für Ihre Aufmerksamkeit.
Dank u voor uw aandacht.

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