

**CENTRAL COMMISSION FOR THE NAVIGATION OF THE RHINE  
COMMISSION CENTRALE POUR LA NAVIGATION DU RHIN  
ZENTRAKKOMMISSION FÜR DIE RHEINSCHIFFFAHRT  
CENTRALE COMMISSIE VOOR DE RIJNVAART**



**CENTRAL COMMISSION  
FOR THE NAVIGATION  
OF THE RHINE**

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# Inland Shipping Data in Market Monitoring

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## **ETISplus Waterborne Transport Data Workshop**

Neth-ER (The Netherlands House for Education and Research  
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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

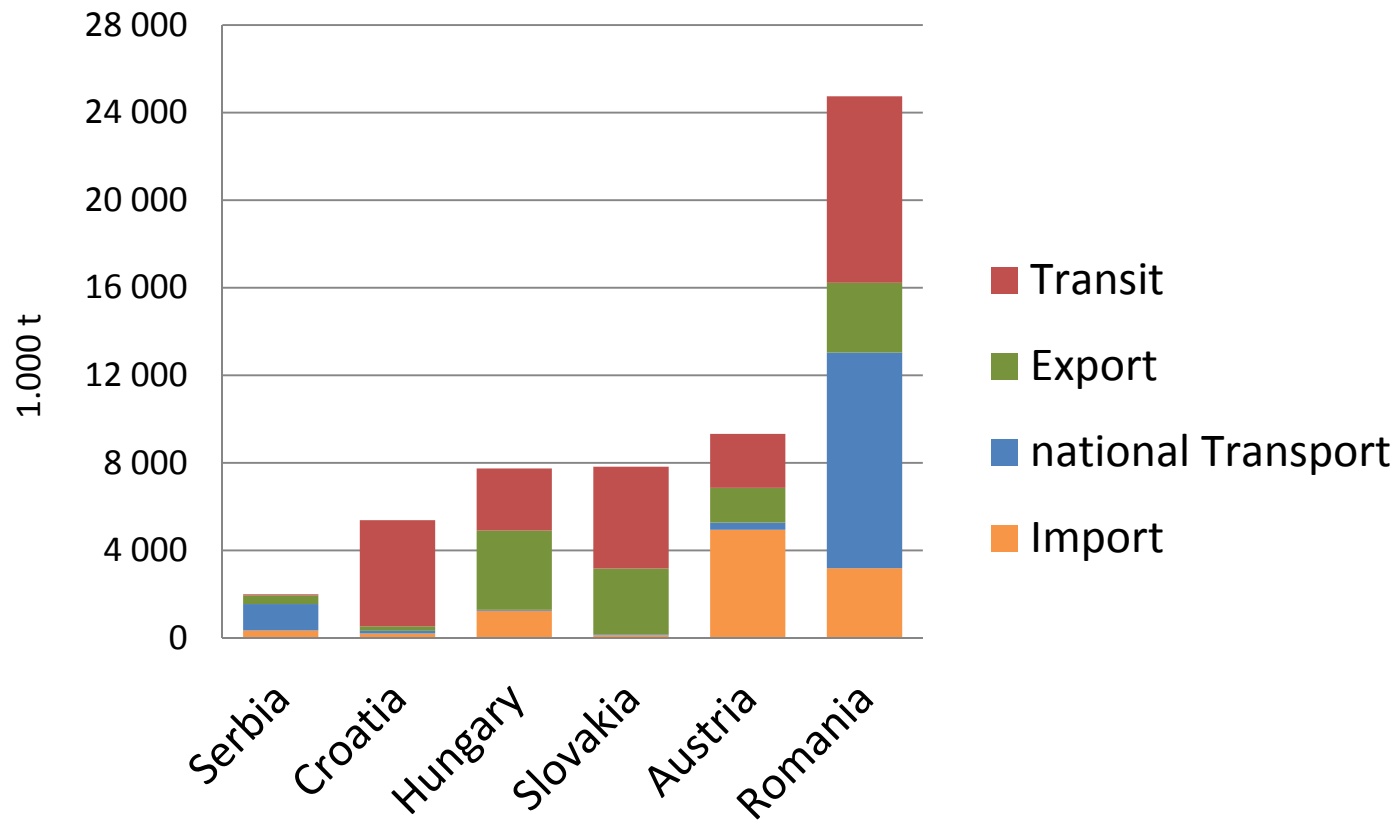
## 1) Transport Demand

*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)*



# Data for Transport Demand – Problems and Limitations (II)

## 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*

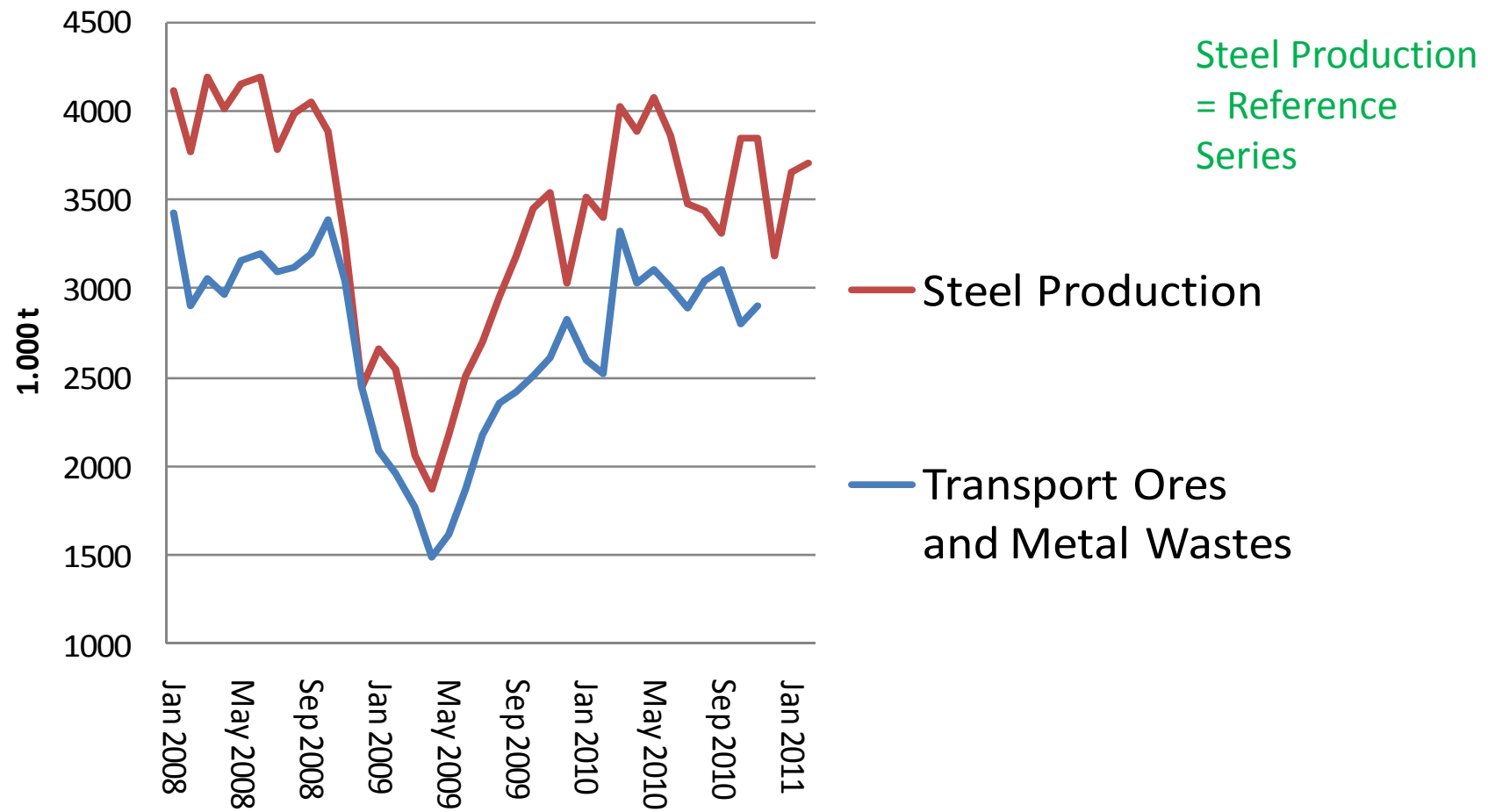


*all countries shall be obliged to produce statistics at this degree of detail*





# Transport Ores and Metal Wastes (Rhine)



Sources: German Statistical Office; Eurofer. German Steel Production



# Overview Sources of Market Observation

## 2) Transport Supply

*Data for fleet statistics...*

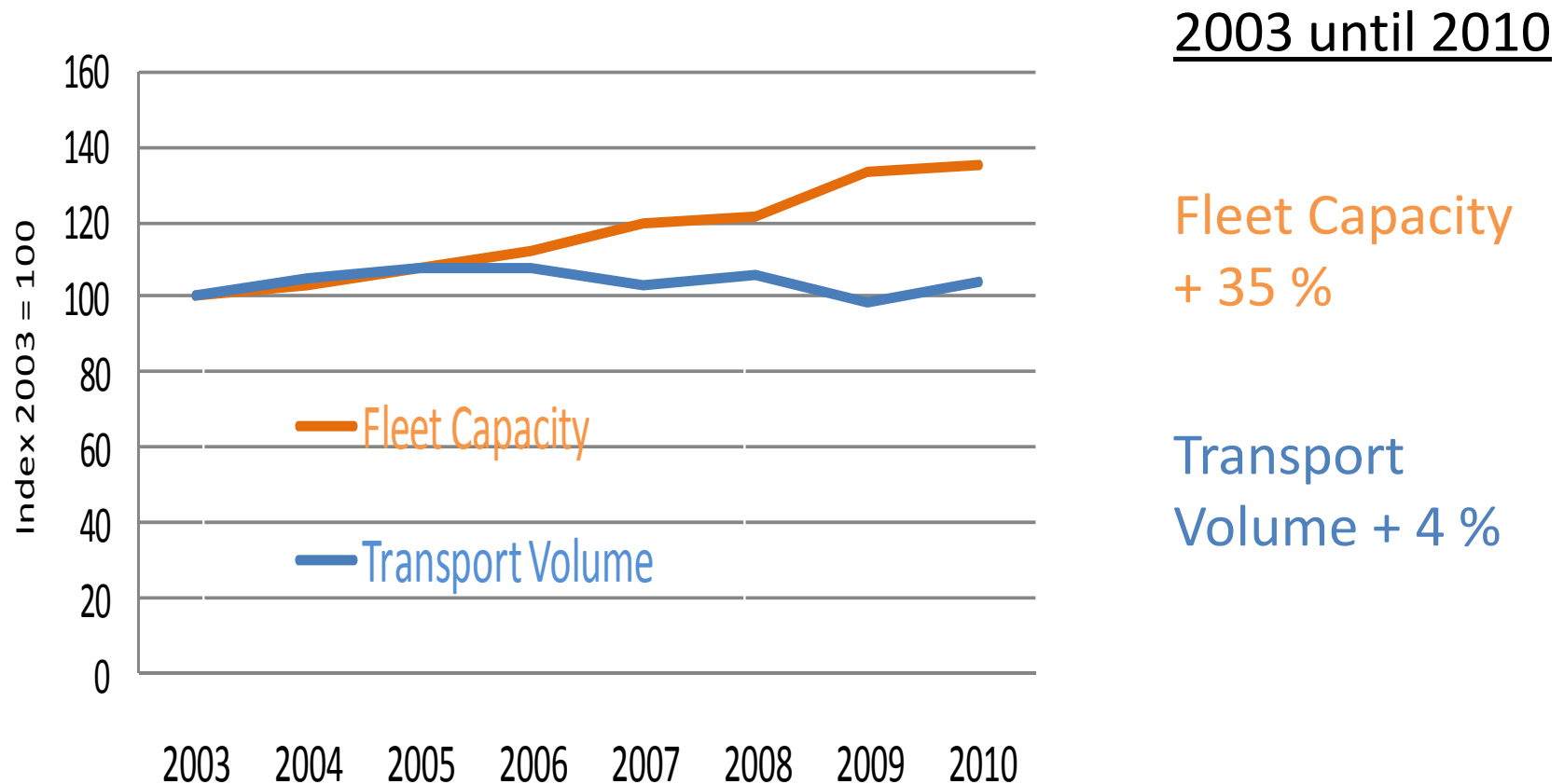
- *National Statistical Offices*
- *International Ship Registers (IVR)*
- *Ministries of Transport*

*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

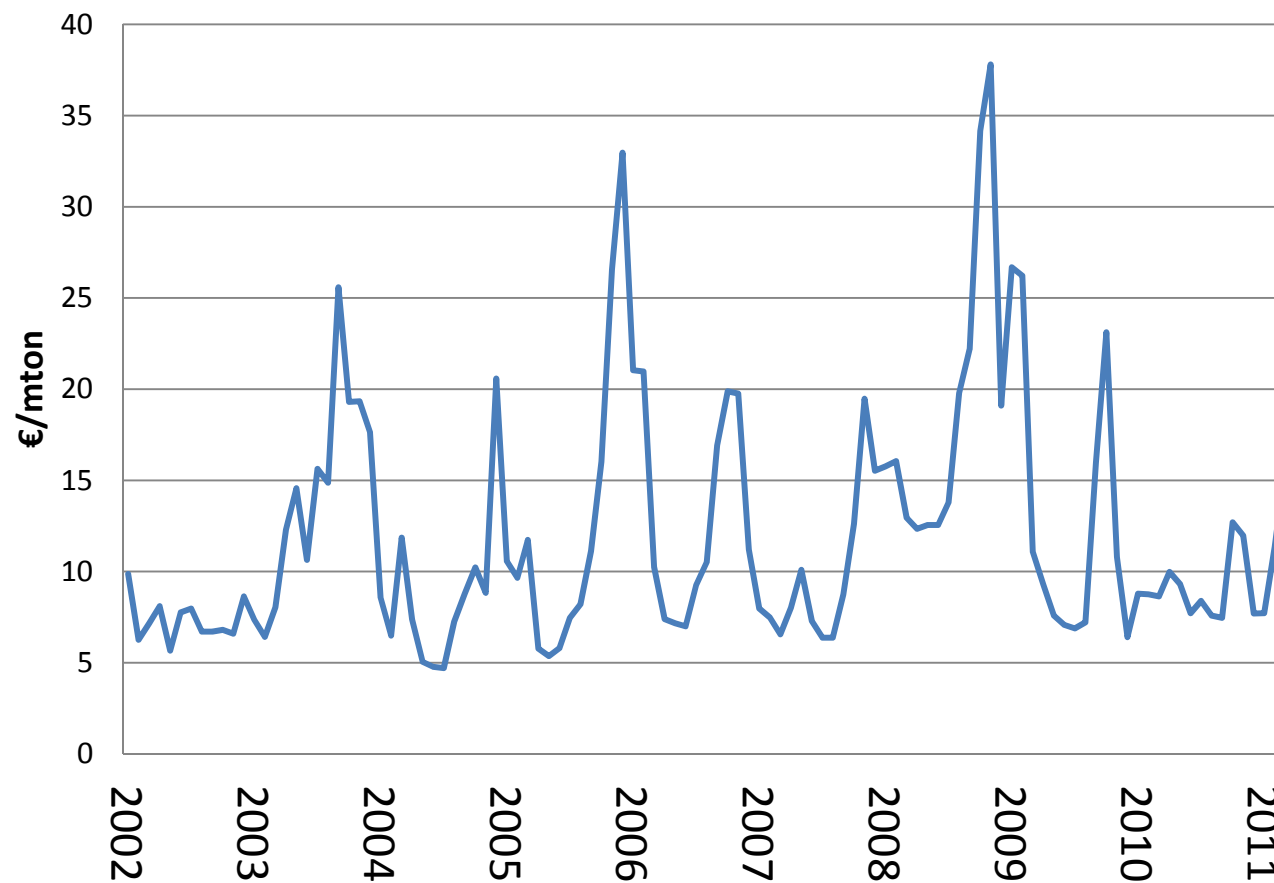
## 3) Microeconomic Indicators

- *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

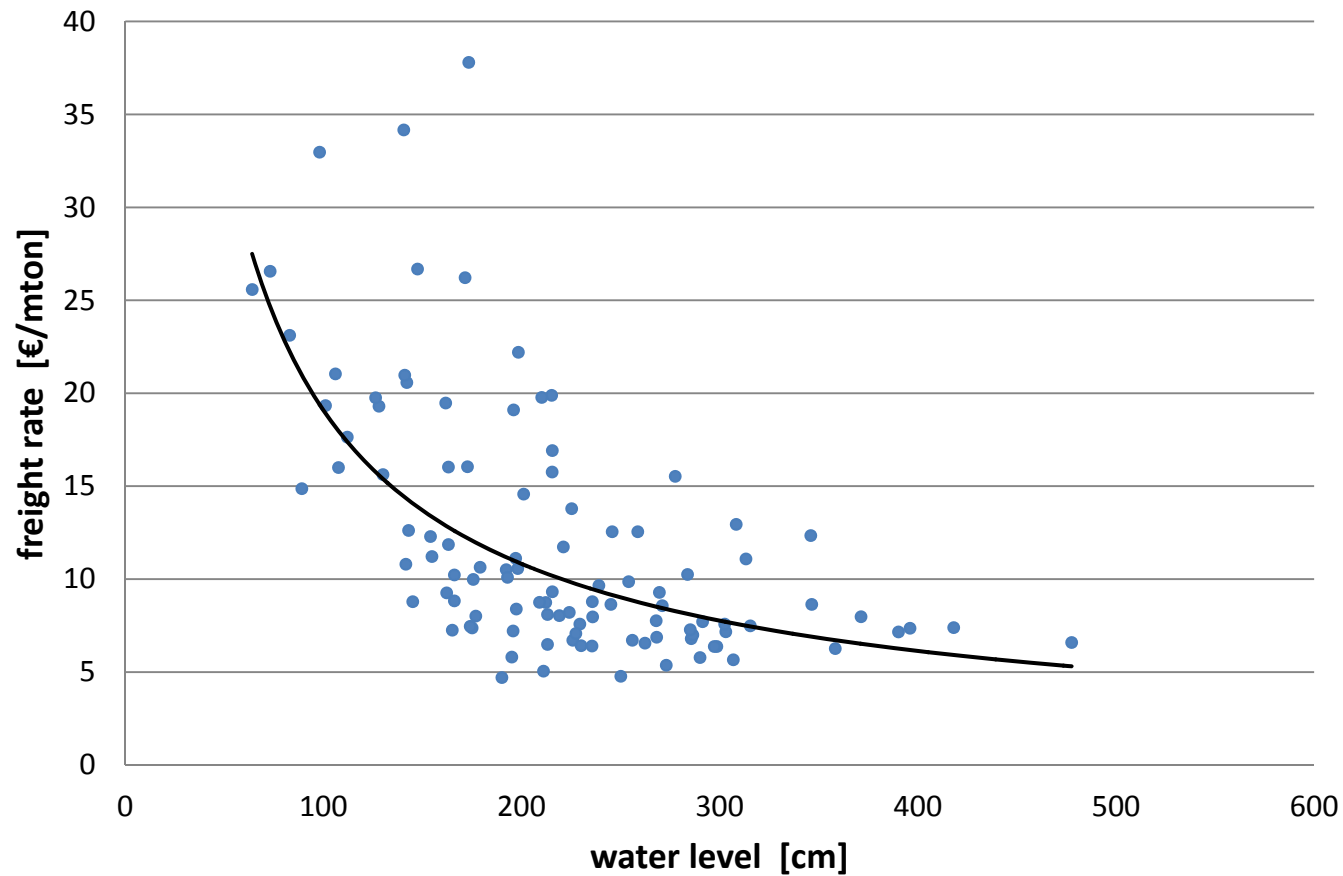
(Gasoil freight rates)



Source: PJK International



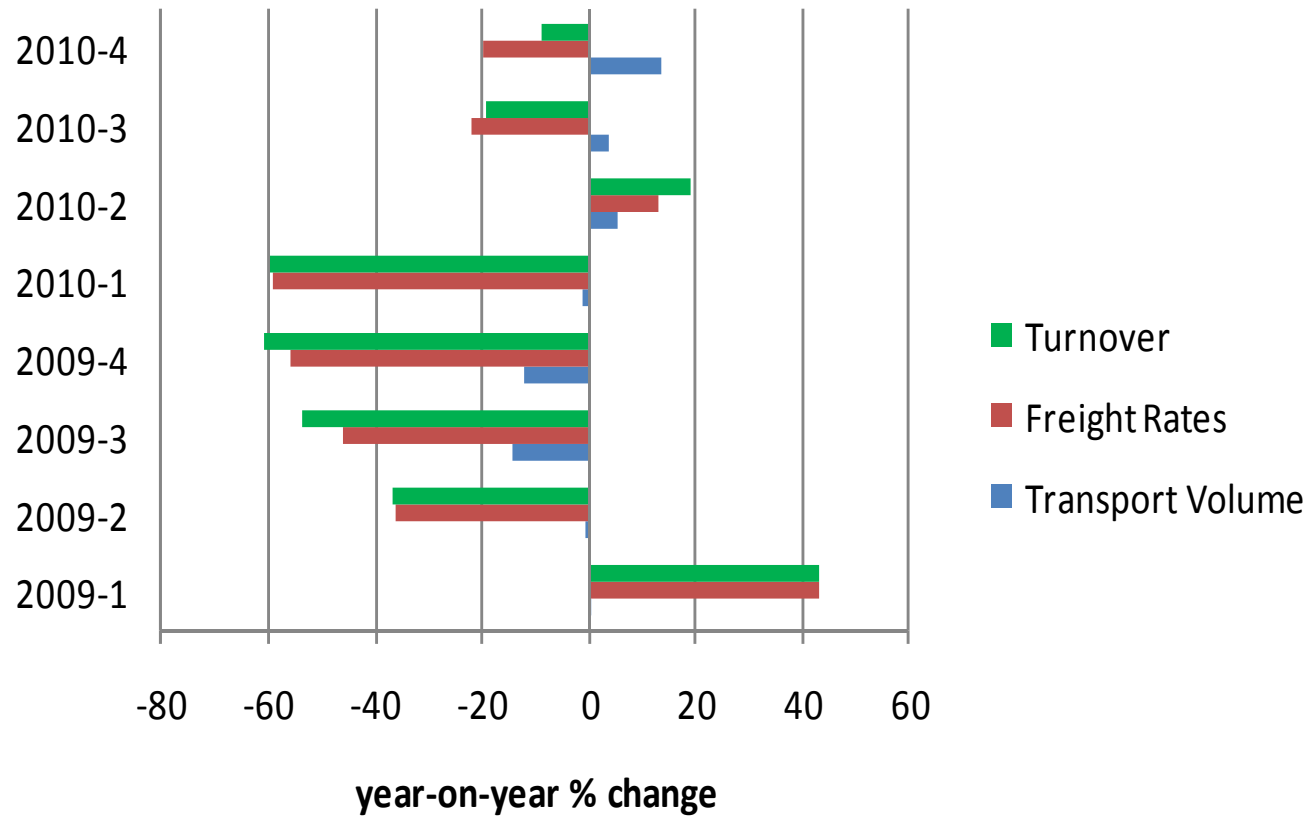
# Freight Rates in Tanker Shipping and Water level



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 ...*

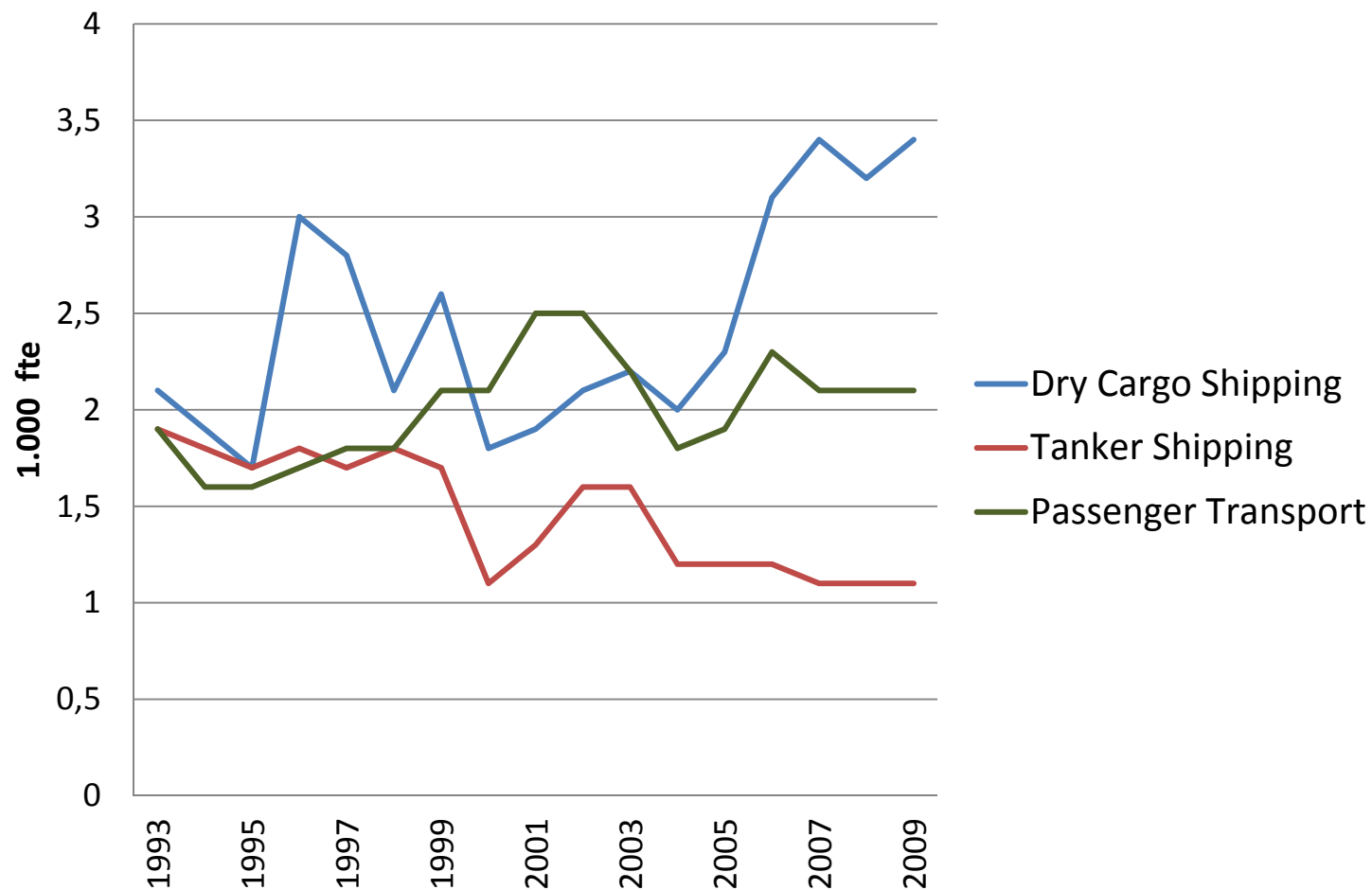
- ***National Statistical Offices*** (for overall employment and employment in sub-markets, wages, etc. )
- ***National Social Security Organizations***  
(for employment according to age groups, number of foreign personnel, number of female and male employees, etc.)
- ***Social Security Organizations for self-employed***  
(for number of self-employed inland shippers)





# Employment in Dutch Inland Navigation

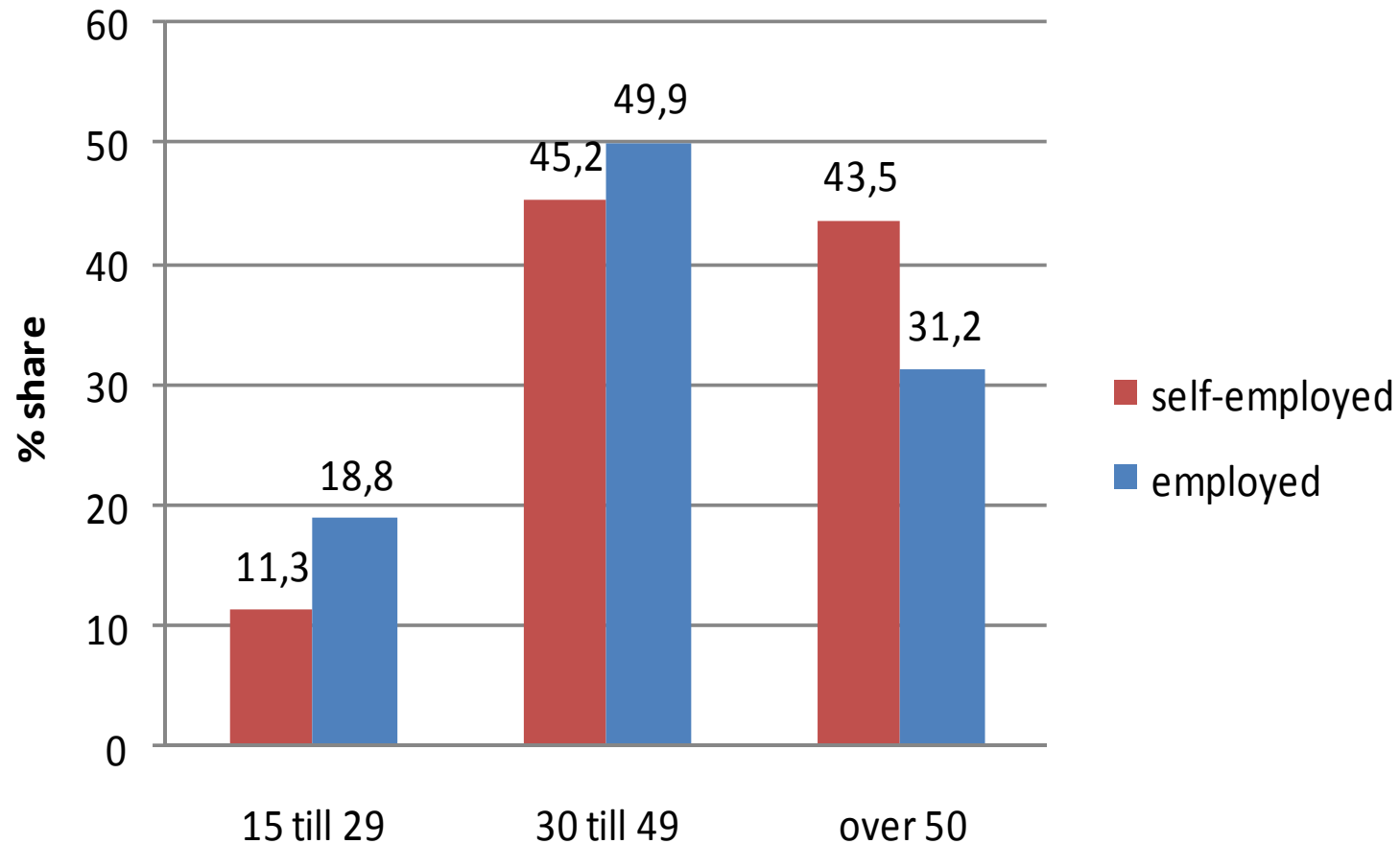
(fte = full time equivalents)



Source: CBS



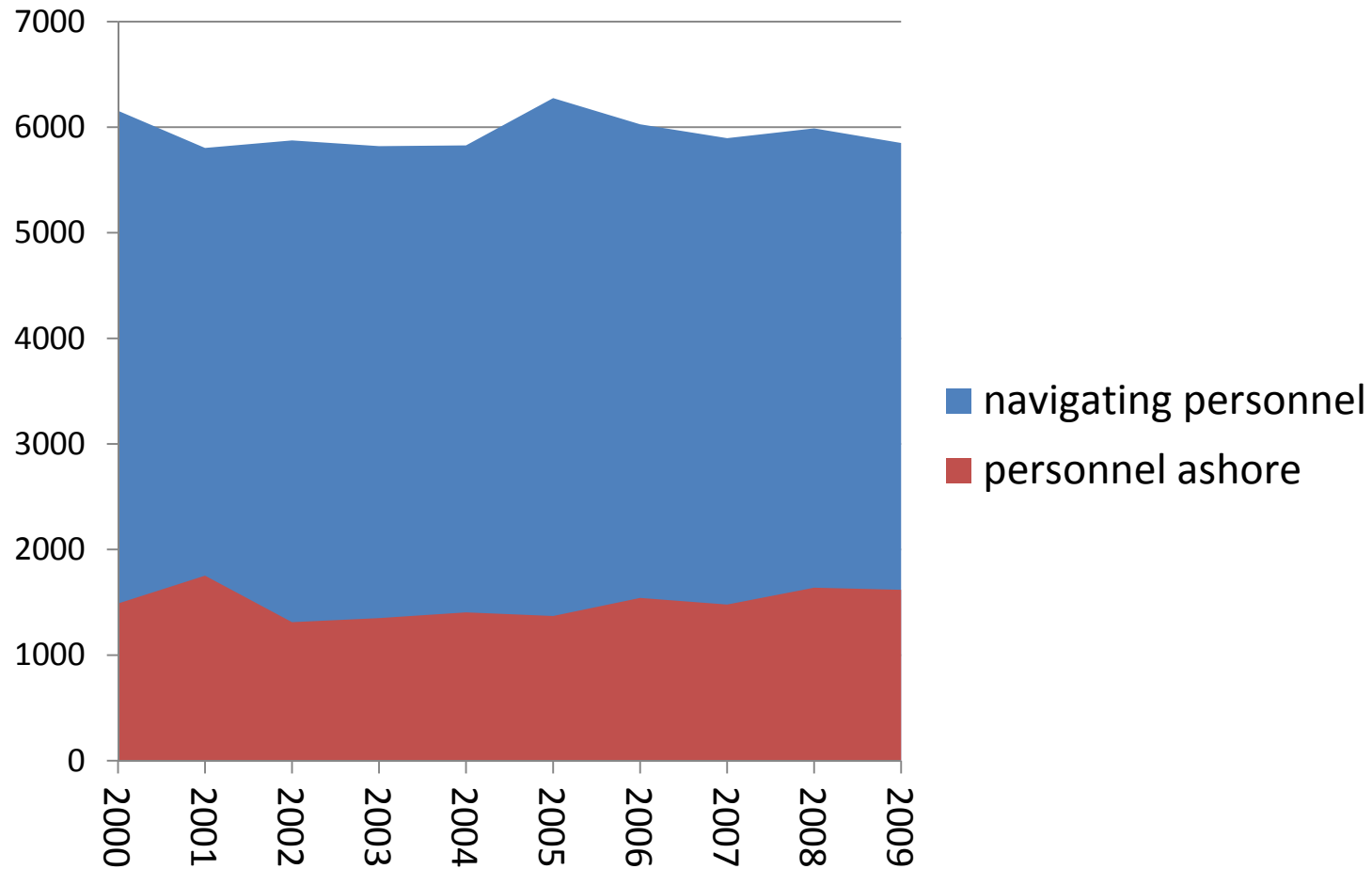
# Age Structure in Belgian Inland Shipping



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.



Norbert Kriedel, CCR

Market observation –

Central Commission for the Navigation of the Rhine (CCNR)

