

THE CCNR PUBLISHES ITS MARKET INSIGHT / APRIL 2021

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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, French, German or Dutch or viewed directly online at www.inland-navigation-market.org.

EXECUTIVE SUMMARY

Transport performance (TKM) on inland waterways in the EU decreased by 8.1% in the first three quarters of 2020, compared to the same period in 2019. In the two largest inland waterways transport (IWT) countries there was a decrease of -11.9% (Germany) and -6.8% (the Netherlands). In the Danube countries, transport performance was 9% lower. Overall, these rates of change were less negative than had been expected in early 2020 when the pandemic broke out.

For the Rhine, a decrease of 11% is observed. The differentiation of transport demand by type of cargo reveals the following: In the first three quarters of 2020, dry cargo transport on the Rhine decreased by 13%, liquid cargo transport by 7% and container transport by 5%. The transport demand related to the steel industry represents 25% of total Rhine transport and suffered heavily from the pandemic, which explains the sharp decrease in dry cargo transport. In the Netherlands, the reduction was 6% for dry cargo transport, 3% for liquid cargo transport, while container transport increased by 2%. Container transport also recorded higher levels in Belgium, compared to the first three quarters of 2019.

For passenger transport, the initial loss estimations were confirmed by the developments in 2020. As expected in early 2020, the activity in passenger transport collapsed almost entirely in 2020. A reduction of 90-95% in the number of passengers is observed for river cruising.

With the drop in oil prices due to the pandemic, fuel prices (gasoil/diesel) fell by 32% between Q1 2020 and Q2 2020. Between Q2 and Q3 they rose again (by 17%), in parallel with the partial reopening of the European economies. Between Q3 and Q4, fuel prices dropped by 3%. In 2021, fuel prices in IWT are expected to increase by 5-7%, in parallel with oil prices, for which different forecasts point to a limited uptake.

Other costs in inland navigation are expected to increase to a limited extent in 2021, with the only exception being capital costs, where a reduction of interest rates and insurance values of ships should lead to a decrease.

A special chapter of the report is dedicated to France, where sands, stones and building materials represent the largest cargo segment. Its transport performance follows a positive trend. The segment was affected by the Covid-19 crisis in March and April 2020, but transport performance recovered in the course of May and June back to pre-crisis levels. Agricultural products are the second largest cargo segment in France and its transport demand is closely associated with harvest results. After a good harvest season in 2019, the 2020 season was somewhat weak, which will have a negative effect on the transport of grain in 2021.

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 a thematic report once a year, 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.

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.



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