

THE CCNR PUBLISHES ITS MARKET INSIGHT / APRIL 2022

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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

Despite the containment measures related to the pandemic at the beginning of 2021, the transport performance (TKM) on inland waterways in the EU increased by 4.3% in the first half year of 2021, compared to the same period the previous year (from 66,021 Mio. TKM to 68,864 Mio. TKM). The Netherlands and Germany, the two countries representing the highest share in inland waterway transport in Europe, both reported a growth in transport performance of 5.5% (the Netherlands) and 4.7% (Germany).

For the Rhine, an increase of 7.0% is observed for the first three quarters of 2021 compared to 2020. This positive development derives from both an increase in transport demand for coal (+30%) and iron ore (+18%) in particular. The discussion on the phasing out of coal has been shifted timewise due to soaring gas prices and a sharp rise in demand for coal from the energy sector. While dry cargo saw an increase in volumes overall, liquid cargo remained on a stable path. With regard to container transport, an increase for Rhine countries is observed.

Passenger transport recorded a partial recovery in the number of river cruise vessels passing certain locks. However, the maximum capacity of the vessels was far from having been reached which represented a burden for the profitability of the sector.

The forecast of oil prices remains rather uncertain due to current geopolitical circumstances. Oil prices passed the US\$100 mark at the beginning of March 2021. Although a reduction is forecast for 2022, no certainty prevails.

A special chapter of the report is dedicated to Switzerland, where mineral oil products represent the largest cargo segment in IWW freight transport. The Rhine's modal share within the Swiss imports of mineral oil products adds up to 24% whereas pipelines have the highest modal share with 36% in 2020.

Switzerland accounts for a high share within IWW passenger transport. In this sector, the financial turnover of Swiss companies represents 25.1% of all the turnover that is generated in the EU and in Switzerland. Swiss companies are active in river cruising on European rivers, but also in day trip shipping on Swiss lakes and on the Swiss part of the Rhine.

We wish you an enjoyable read!

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.

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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