

## THE CCNR PUBLISHES ITS MARKET INSIGHT / APRIL 2023

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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/?lang=en>.

### EXECUTIVE SUMMARY

In the first half year of 2022, the freight transport performance on European inland waterways decreased by 2.8% compared to the first half year of 2021. The main reasons are to be found in the economic consequences of the Russian war of aggression against Ukraine. This war increased prices in the energy sector and led to shortages and price increases in industrial input factors.

Transport demand in inland navigation was not spared by these developments. On the Rhine, the only goods segment that achieved an increase in volume was coal transport (+26%). On the lower Danube, an increase in grain transport was observed as this river stretch acted as an alternative route for Ukrainian grain exports. By offering this alternative route, inland navigation helped to compensate for the blockage of Ukrainian seaports. Grain transport from the middle Danube region towards the Black Sea ports decreased, due to middle Danube countries imposing export controls on grain and foodstuff.

For its part, the activity in the passenger transport sector finally returned to pre-pandemic levels, after huge losses of activity in 2020 and 2021. This recovery can be seen for both the Rhine and the Danube.

Next to transport demand, the report also analyses operating conditions. Regarding fuel prices in inland navigation, they roughly doubled between mid-2021 and mid-2022, reaching their highest level since the beginning of 2006. The reasons can be found in the rise of energy prices (including crude oil prices), provoked by the war in Ukraine.

Freight rates followed an upward direction in the first half year of 2022 which was more pronounced for dry bulk than for liquid bulk. Reasons for this trend were the start of a low water period that unfolded its entire magnitude in late summer of 2022 (Q3 2022). For dry bulk, the boom in coal transport also played a role.

The third chapter of the report assesses the situation of inland navigation in Italy. Freight transport develops almost entirely along the river Po and its adjacent canals. Hydrological conditions are somehow fluctuating, but despite difficult hydrological conditions, the years 2020 and 2021 saw freight transport increase to almost one million tonnes per year.

Of a high relevance for Italy is passenger transport. The lakes and the Venice lagoon account for more than 99% of all passenger transport on Italian inland waterways.

**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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