

## THE CCNR PUBLISHES ITS MARKET INSIGHT/WINTER 2017-2018

Ref: CC/CP (18)02

The new quarterly 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 Winter 2017-2018 Market Insight provides a wealth of information on the situation of inland navigation at the end of 2017 and the beginning of 2018. The executive summary of the report may be found below. The full report can be downloaded in PDF format in Dutch, English, French or German from <http://www.ccr-zkr.org/13020800-en.html> or viewed directly online at: [www.inland-navigation-market.org](http://www.inland-navigation-market.org).

### EXECUTIVE SUMMARY

During the first semester of 2017, the pace of economic growth in Europe surpassed expectations, propelled by resilient private consumption. The intra-EU-trade actually increased by 2.2% from the first semester of 2016 to the first semester of 2017. Several economic sectors benefited from these positive economic conditions such as the steel industry and the construction sector.

The European inland navigation transport performance was not able to benefit from this economic growth during the first quarter of 2017 due to the environmental conditions. Low water levels on the Rhine and on the Danube, particularly in January 2017, together with ice periods on the Danube, reduced freight transport performance in these two river basins. With better water conditions during the second quarter of 2017, transport performance on the Traditional Rhine increased by 11% between the first and the second quarter of 2017. Inland navigation activity returned to 2016 levels, and transport performance on the Rhine even increased by 2% during this second quarter of 2017 compared to 2016. This recovery is a general evolution that has been observed both on the Danube and on the Rhine and on all its tributaries. Further details on the evolution by country, by inland ports and by market segment are available in the Winter Market Insight 2017/2018.

Furthermore, a focus on coal transport is provided in the quarterly report. The energy sector and the steel industry are the two essential drivers for coal transport via inland shipping in Europe, and as the share of imported coal increases, inland navigation is increasingly needed for the transport of coal from major sea ports to the hinterland. Nevertheless, coal consumption — especially in the energy sector — is currently decreasing in favour of renewable alternatives, and it is also foreseen that coal transport will decrease. This decrease is expected to be compensated by the growth of other market segments in 2018 and in particular by the transport of agricultural products, building materials and containers.

### ABOUT THE MARKET OBSERVATION AND MARKET INSIGHT

The Market Observation and Market Insight are respectively annual and quarterly publications by the CCNR dealing with the European inland navigation market. Free of charge, these analyses of the economic situation 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 Central Commission's activities now reach beyond the Rhine and are directly concerned with European navigable waterways more generally. The Central Commission works closely with the European Commission as well as with the other river commissions and international organisations.



Palais du Rhin  
2, place de la République  
F - 67082 Strasbourg Cedex  
CS10023

Tél. +33 (0)3 88 52 20 10  
Fax +33 (0)3 88 32 10 72

ccnr@ccr-zkr.org  
www.ccr-zkr.org

**We wish you an enjoyable read!**