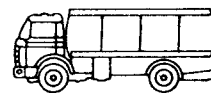


EUROPEAN COMMUNITIES

EUROPA TRANSPORT



OBSERVATION OF TRANSPORT MARKETS

ANALYSIS AND FORECASTS

FIRST ANNUAL REPORT



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ANALYSIS AND FORECASTS

FIRST ANNUAL REPORT

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Introduction

This report has been prepared as part of the system for observing transport markets set up by the Commission of the European Communities following the Council statement of 12 June 1978.

The other parts of the system are as follows:

- (a) quarterly surveys among carriers,
- (b) quarterly reports on transport activity,
- (c) reports on changes in price indices,
- (d) reports on changes in cost indices,
- (e) analysis of the medium-term development of the transport market.

The scope of this report is the same as that of the observation system:

- (a) international transport between Community Member States, and
- (b) carriage by rail, road and inland waterway.

The report has been drafted on the basis of the forecasts carried out, at the Commission's request, by the IFO Institute, Munich¹. A technical paper explaining the estimating and forecasting methods and setting out the detailed results will shortly be available. It should be noted that the basic statistical information used is often the product of cross-checking and estimates, particularly where the countries concerned did not have at their disposal sufficiently long statistical series to carry out the modelling work required. Consequently, there may be differences between the information contained in this report and the information which certain Member States may have. We have attempted to keep such differences to a minimum.

¹The estimates and forecasts were made at the end of October 1980. The recent downward revision of the general economic forecasts implies that the transport forecasts made in this report must be regarded as the maximum likely to be attained.

This is the first annual report published as part of the market observation system. This first attempt will subsequently be improved, particularly by using not only the results of the forecasting model but also those deriving from other parts of the system, so that this report will become a synthesis (on an annual basis) of all the work carried out in the context of the market observation system.

PART I

Transport in general

1. Transport and economic activity

The pattern of transport operations (tonnage, geographical location and mode of transport) was influenced in 1980 and will continue to be influenced in 1981 by four main factors, apart from the slowing down in the growth rate of the gross domestic product:

1. the crisis in the steel industry, which has led to a marked decrease in the volume of raw materials (ore, coke and coking coal) and finished and semi-finished products carried;
2. energy policy decisions, which have caused the volume of petroleum products carried to fall or stagnate and that of steam coal¹ to rise;
3. the level of activity in the building sector, which is very responsive to the - often divergent - political choices of national authorities;
4. the favourable influence of cyclical trends in the consumer and capital goods sector, which have maintained a strong growth rate in transport operations involving this sector.

We shall see subsequently that these factors have influenced, and will continue to influence, international transport to varying degrees depending on the means of transport and infrastructure available, the goods in question and, to some extent, on the statistical definitions used. However, it can already be seen that, generally speaking, the problems faced by many economic sectors have not yet affected intra-Community transport operations and should not affect them in 1981.

¹ Steam coal being the coal supplied to thermal power stations.

2. Transport activity

These and other, generally less important, factors have influenced, and are continuing to influence, the growth rate in total tonnage carried by road, rail and inland waterway between Member States as follows:

	1978/77	1979/78	1980/79	1981/80
Growth rate:	+ 6.4%	+ 4.8%	+ 5.6%	+ 2.6%

Expressed in terms of tonnage these rates correspond to:

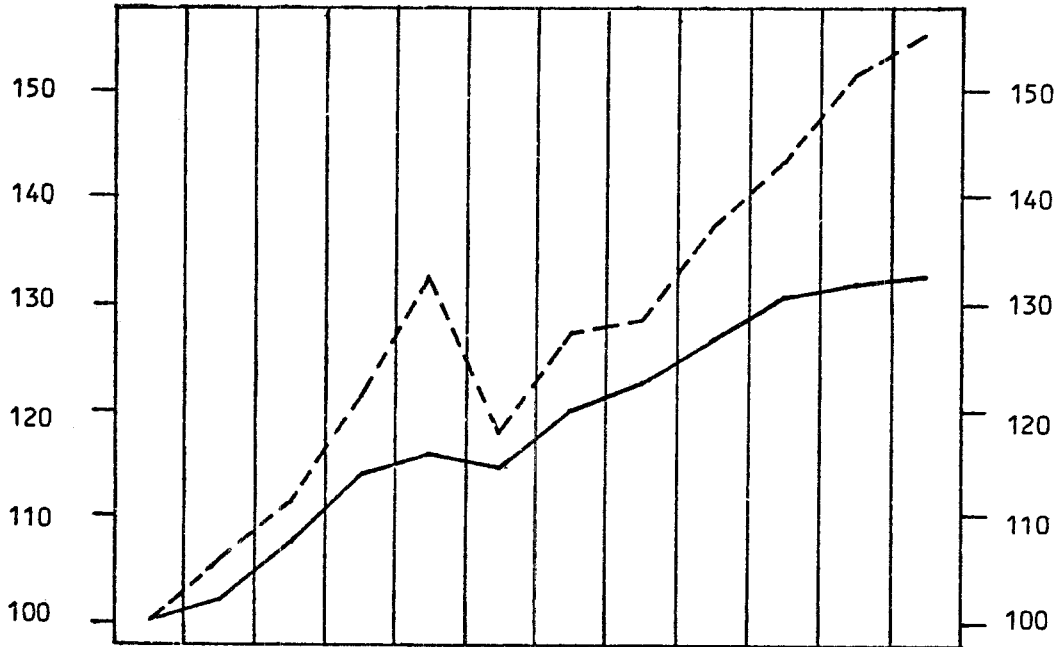
	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Millions of tonnes carried	414.5	434	458.5	470.5

A more detailed comparison of these trends in transport with trends in economic activity can be found in the diagrams on the following page. It can be seen that there was a greater decline in the growth rate in transport operations than in that of the gross domestic product, as was also the case in 1974-75 and 1976-77.

COMPARISON OF INLAND FREIGHT TRANSPORT BETWEEN EEC MEMBER STATES
AND THE GROSS DOMESTIC PRODUCT AT MARKET PRICES (1975 PRICES AND
EXCHANGE RATES)

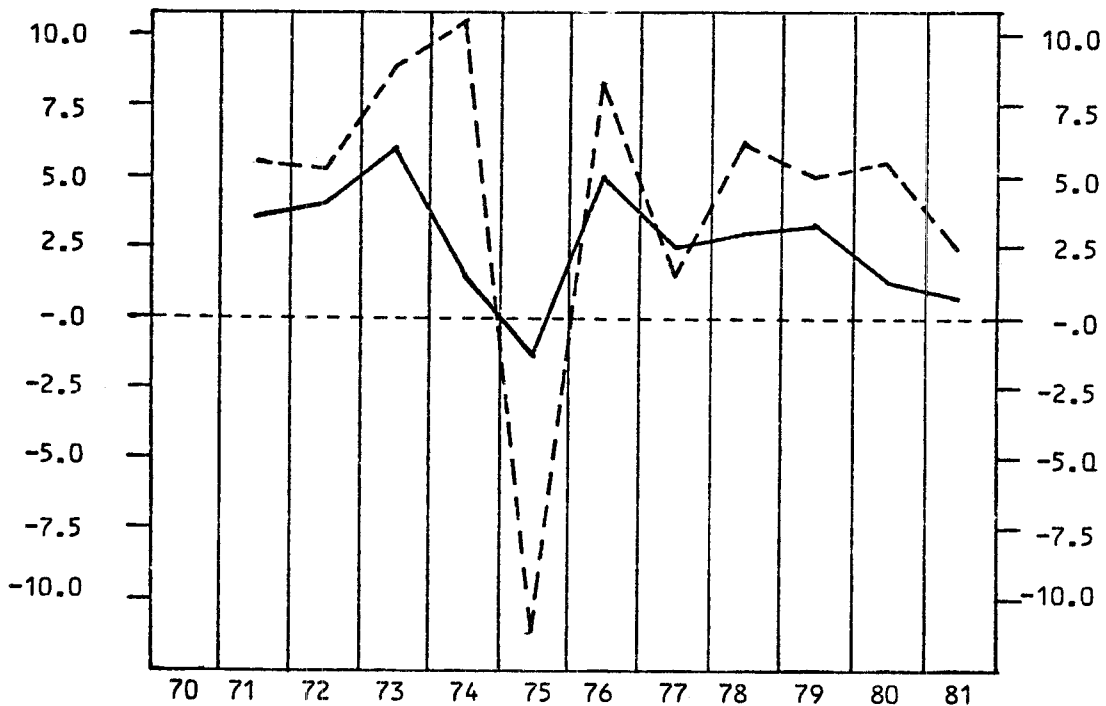
———— GROSS DOMESTIC PRODUCT (VOLUME) INDICES (1970 = 100)

- - - - - TRAFFIC INDICES (1970 = 100)



———— GROWTH RATE IN GROSS DOMESTIC PRODUCT

- - - - - GROWTH RATE IN TRAFFIC



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3. Activity in the different modes of transport

The share of each mode of transport in total traffic varies because a particular type of goods tends to be carried by one mode of transport rather than another. The growth rate for each mode, obviously, also varies.

3.1 Rail transport

Owing to their dependence on the steel industry, which provides almost 60% of the tonnage they carry, the railways have been particularly affected by the slump in this sector, which is likely to persist. The trend in rail traffic is as follows:

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Million tonnes:	71.3	80.2	78.7	78.8
Growth rate:	(+2.8%)	(+12.4%)	(-1.8%)	(+0.2%)

3.2 Road transport

The pattern for this type of transport is slightly different, as the growth rates for the period under review are all positive although their absolute value has fallen¹.

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Million tonnes:	150.7	163.2	175.3	181.6
Growth rate:	(+7.3%)	(+8.2%)	(+7.4%)	(+3.6%)

One of the main reasons for this persistent positive trend is the fact that the sectors generating road haulage business (consumer goods and capital goods) have not been hit as severely by the recession. Moreover, owing to its distinctive structure, the road haulage sector can adapt more readily to market changes caused by the crisis.

¹This trend was confirmed where 1979 and 1980 are concerned by the results of the business surveys among carriers.

3.3 Inland waterway transport

This sector is less dependent on the steel industry than the railways are and has hence not been hit as badly by the steel crisis. Similarly, and to a much greater extent than rail transport, it may benefit from housing construction programmes in a number of countries. However, this sector is still feeling the effect of the energy crisis, being the main carrier of crude petroleum products.

The general pattern for this mode of transport is as follows:

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Million tonnes:	192.3	190.7	204.4	210.1
Growth rate:	(+7.1%)	(-0.8%)	(+7.2%)	(+2.8%)

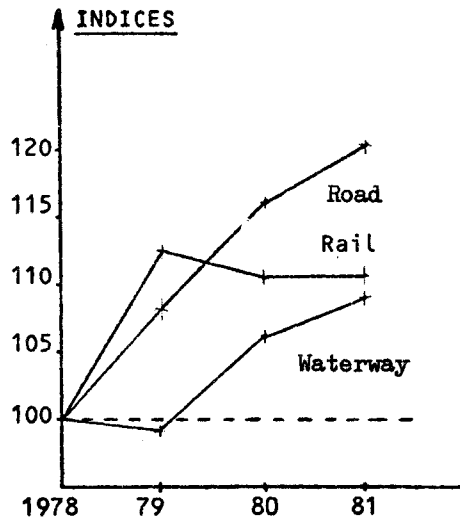
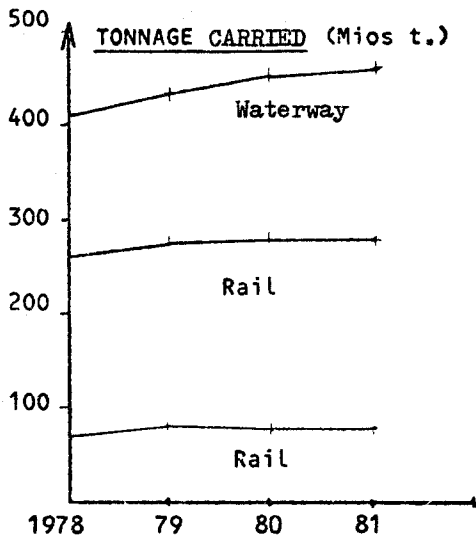
4. Modal split

The respective market shares of the three modes considered, in terms of tonnage carried, are set out below:

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
<u>Rail</u>				
Market share:	17%	18.5%	17%	17%
Million tonnes:	71.3	80.2	78.7	78.8
<u>Road</u>				
Market share:	36.5%	37.5%	38%	38.5%
Million tonnes:	150.7	163.2	175.3	181.6
<u>Inland waterways</u>				
Market share:	46.5%	44%	45%	44.5%
Million tonnes:	<u>192.3</u>	<u>190.7</u>	<u>204.4</u>	<u>210.1</u>
	100%	100%	100%	100%

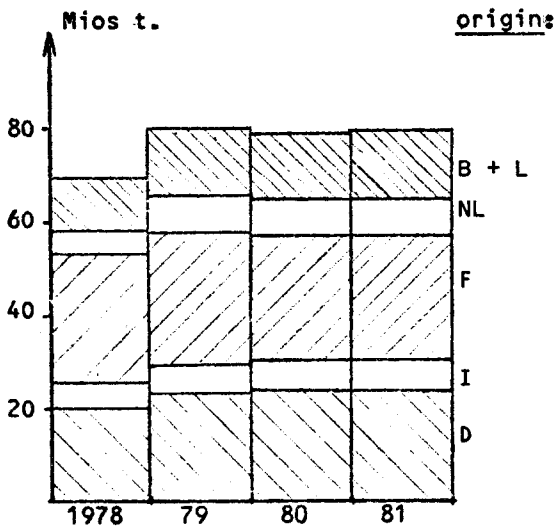
This pattern is the result of developments in industrial activities, the shifting geographical location of traffic, which will be mentioned later, available capacity and competition between modes on some markets. This latter factor, although of only short-term effect, has been taken into account in the disaggregated estimates and forecasts.

The relative increase for each mode is shown in the following diagrams:

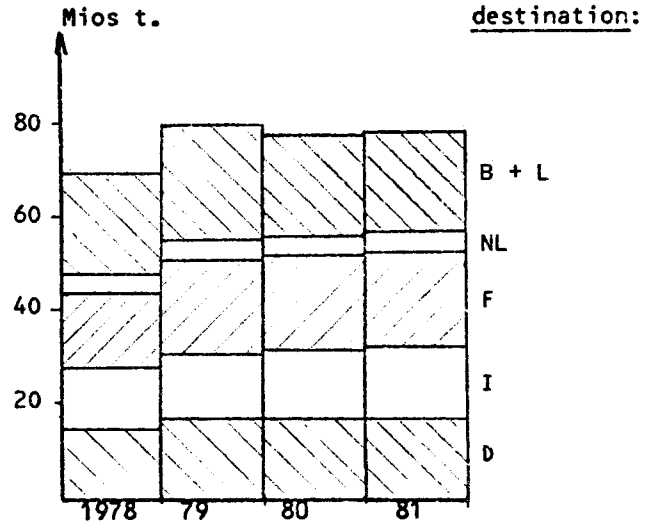


5. Geographical pattern of transport

5.1 The following diagrams illustrate the geographical pattern of rail transport between Member States.



Rail traffic (exports) EUR 6



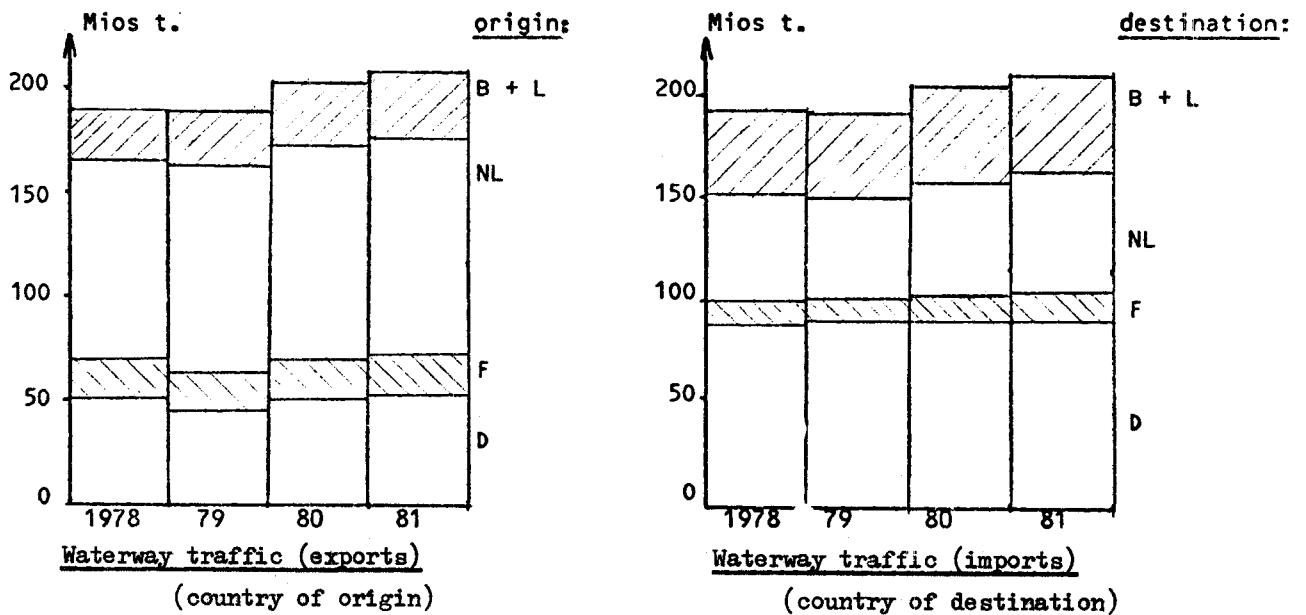
Rail traffic (imports) EUR 6

NB. Insignificant volumes of traffic are not shown in these diagrams but details of the tonnage carried can be found in the statistical annex.

The main shifts in the location of traffic concern coal and ore in particular. Firstly, recent German policy to promote domestic consumption of indigenous steam coal has caused the volume of coal leaving Germany to fall and new flows of imports to former customers for German coal (France and Belgium/Luxembourg in particular) from the Netherlands to emerge.

Secondly, French rail exports have been badly hit by Member States' preference for ore from non-member countries rather than that from Lorraine; this trend is, however, levelling off.

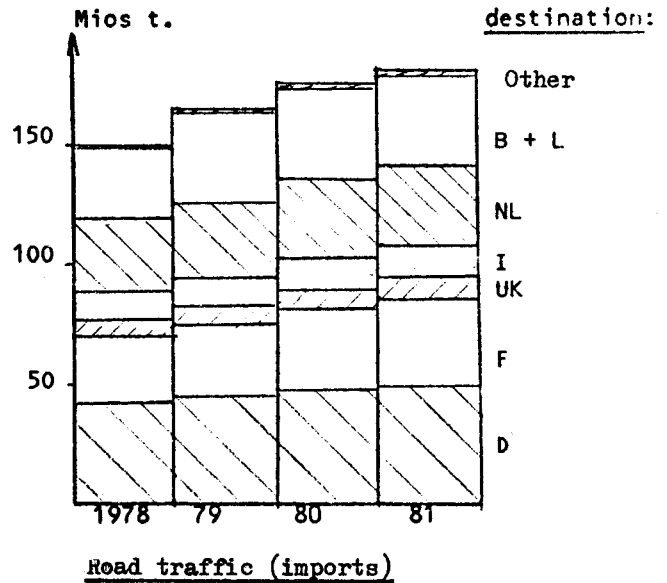
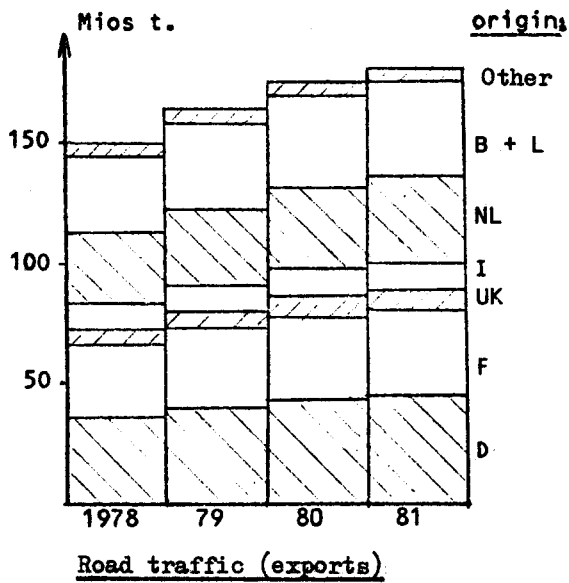
5.2 The geographical pattern of inland waterway transport is depicted below:



The significance of upstream Rhine traffic is clearly evident. The main goods carried are petroleum products and ore; downstream traffic carries building materials in particular.

German coal policy described above is responsible for the main shift in the location of traffic, with new flows of traffic coming from the Netherlands (Rotterdam).

5.3 The following diagrams illustrate the geographical pattern of intra-Community road transport:



The geographical pattern is much looser than that of the abovementioned modes, but this is hardly surprising given the regular geographical distribution of the industries on which the road haulage sector depends.

A more marked feature than the shifting geographical pattern of traffic has been, and will continue to be, new traffic to and from the new Member States generated by enlargement, the effects of which are still being felt today.

PART II

Carriage of certain major categories of goods

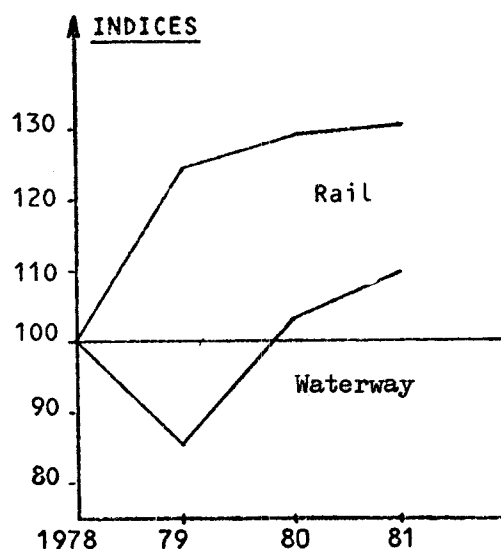
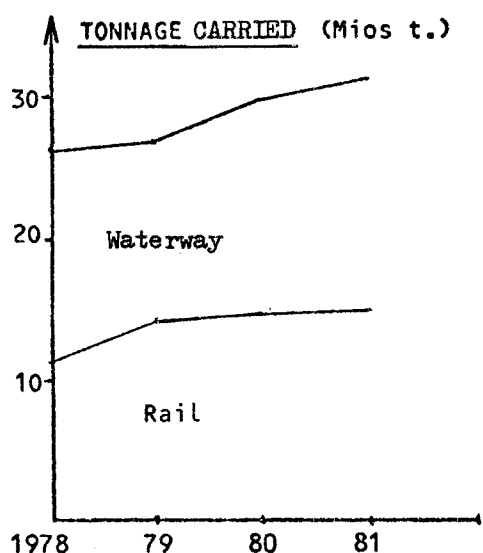
1. Carriage of NST 2 goods

1.1 Type of goods

NST 2 contains the various solid mineral fuels: coal, lignite and peat, coke.

1.2 Transport developments

1.2.1 Goods of this type are basically carried by rail and inland waterway, and only these modes have been considered. The following diagrams and tables show estimated and forecast developments in the carriage of NST 2 goods.



	1978	1979	1980 ^e	1981 ^f
NST 2 tonnage Rail and inland waterway	26,3 m t.	26,9	29,8	31
Growth in NST 2 traffic - Rail and inland waterway	+ 10,5%	+ 2%	+ 10%	+ 4%
NST 2 tonnage Rail	11,3 m t.	14	14,8	15
Growth in NST 2 traffic - Rail	+ 12,9%	+ 24,1%	+ 5%	+ 1,4%
NST 2 tonnage Inland waterway	15 m t.	12,8	15,1	16,1
Growth in NST 2 traffic - Inland waterway	+ 9,1%	- 14,5%	+ 17,5%	+ 6,8%

e = estimate

f = forecast

1.2.2

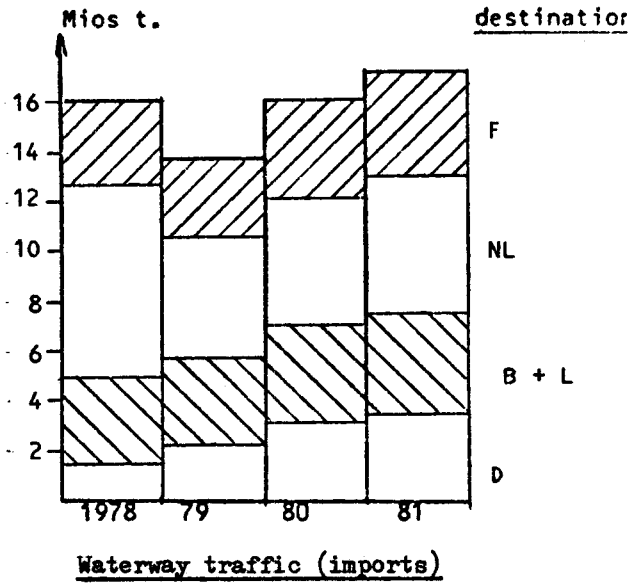
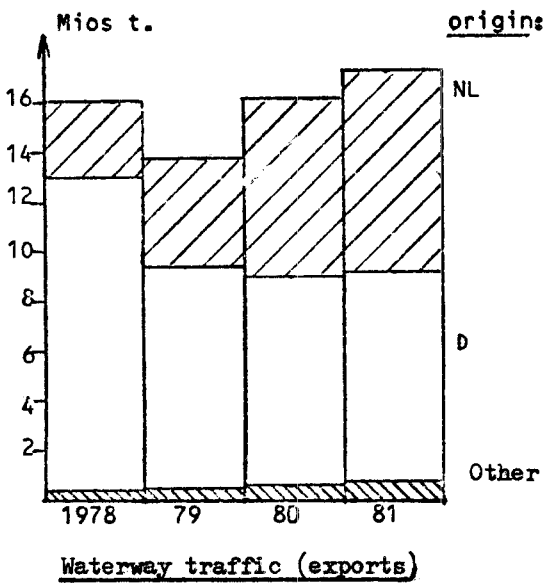
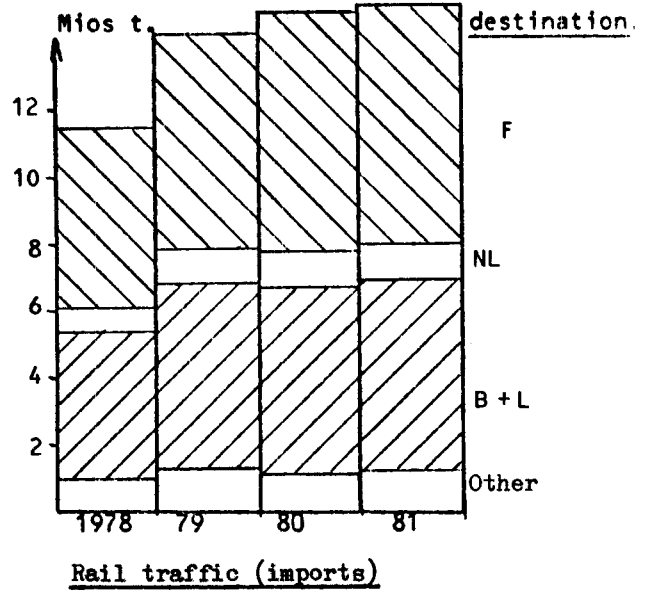
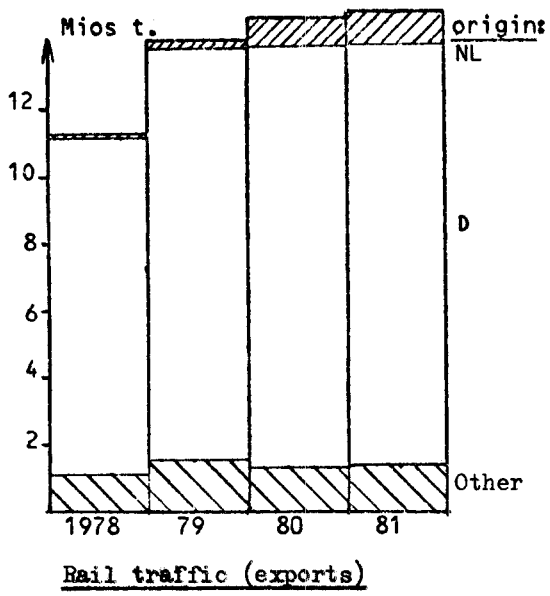
In order to explain past developments and future expectations (a slowing down in the growth of rail transport in 1980 and 1981 after the boom in 1979, and a marked recovery by the inland waterways after a bad year in 1979), a distinction has to be made between the market for the carriage of coal for the steel industry and the market for the carriage of power-station coal.

The market for the carriage of coal for the steel industry is obviously affected by the situation in that industry, for which reliable one-year forecasts are available. The market for the carriage of steam coal, however, is more dependent on energy policy decisions and hence, in theory, harder to forecast. Nevertheless, the general policy in favour of replacing oil by coal in certain thermal power stations and the undertakings given in most countries seem to bode well for the immediate future.

It should be made clear, incidentally, that although the market for the carriage of NST 2 goods depends on the state of the steel industry and on energy policy, the first factor is the decisive one. In other words, even if an energy policy very much in favour of the intensive use of coal should develop, this would not make up for the adverse effects on transport of even a slight worsening in the position of the steel industry.

Because of this situation, the carriage of coal by rail, which increased considerably in 1979 for a number of reasons - weather, commercial policy and the relocation of coking plants - is now feeling the effects of the steel recession. All in all, therefore, growth in the carriage of NST 2 goods by rail in 1980 and 1981 is less favourable than for inland waterway transport. Part of the reason for this is that the most favoured routes are those where waterways are well established.

1.2 Geographical pattern of transport



In the case of the railways, the biggest flow of traffic is from Germany to Belgium/Luxembourg and France. The tonnage involved accounts for 85% of the carriage of NST 2 goods by rail between Member States, and has progressed as follows:

	1978	1979	1980	1981
Million tonnes:	9.2	11.1	11.3	10.4
Growth rate:	-	(+ 20.6%)	(+ 1.8%)	(- 8%)

Of the traffic between Germany and France, 65% comes from "Nordrhein-Westfalen" and 34% from the "Rhein-Pfalz-Saar-Gebiet". This state of affairs has not changed since 1979 when there was a considerable increase in the case of the first region from 56 to 66%. Some 70% of the goods in question are bound for "France Nord-Est" and some 25% for "France Nord-Ouest" (this figure having increased very slightly since 1979).

As traffic between Germany and France consists of coke and coking coal, it has been seriously affected by the steel crisis (and is 1% down in 1981).

Traffic between Germany and Belgium/Luxembourg also includes domestic heating fuels. Apart from guaranteeing a supply of coke, this has helped to alleviate the impact of the steel crisis on these routes (up by 2.8% in 1980 and by 2.3% in 1981).

In the case of the inland waterways, traffic has also changed somewhat because Germany is now consuming a greater proportion of its indigenous coal. Germany's contribution to exports of NST 2 goods from the Community countries has dropped from 79% in 1978 to 49% in 1981 while the Netherlands should contribute 47% in 1981 compared with 19% in 1978 (coal from non-member countries).

2. Carriage of NST 3 goods

2.1. Type of goods

NST 3 contains the petroleum products:

- (i) crude petroleum
- (ii) fuel derivatives
- (iii) gaseous hydrocarbons, liquid or compressed
- (iv) non-fuel derivatives (bitumen, etc.)

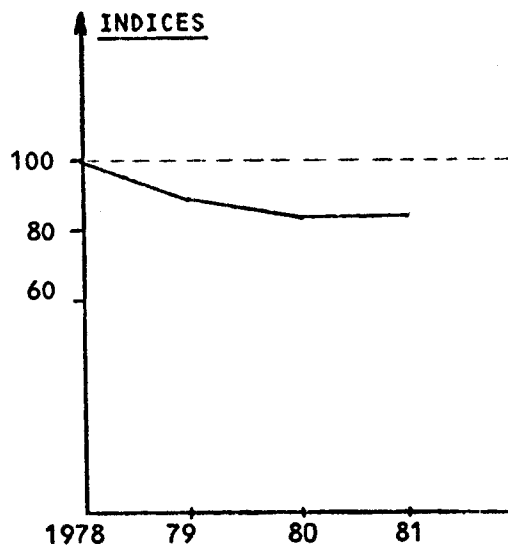
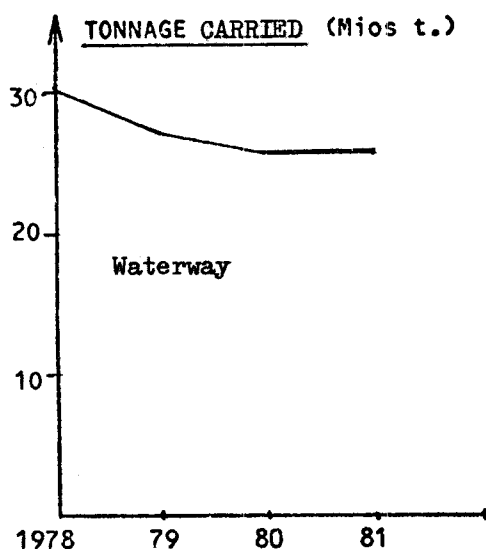
2.2 General developments

2.2.1 Developments in this traffic depend on three main factors:

- (i) policies to encourage energy saving, which have a considerable effect on the consumption of heating fuel
- (ii) the general economic situation and the level of industrial activity
- (iii) the refineries' product range policies (relative proportions of heavy and light distillates).

These factors have all had a considerable bearing on the deterioration of this traffic over the last few years, although the effects - which were still evident in 1980 - should level off in 1981.

2.2.2 In the case of the waterways, which (after pipelines) carry the largest proportion of these goods and are the only sector considered, the following trend emerges:

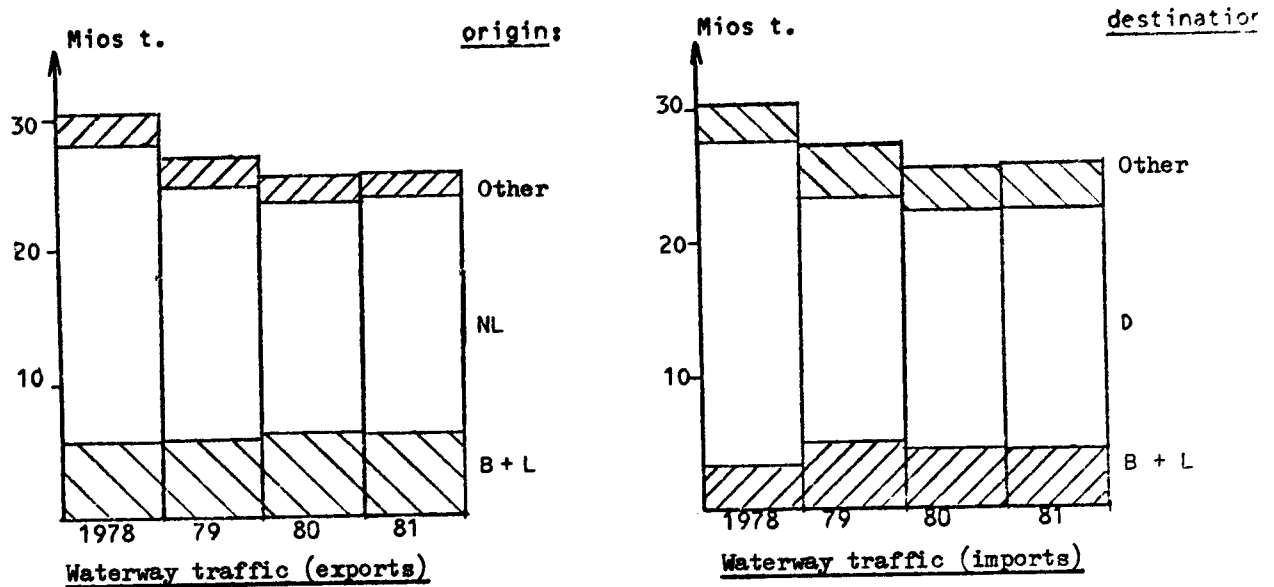


The relevant figures are as follows:

	1978	1979	1980	1981
Million tonnes:	30.4	27.1	25.7	25.8
Growth rate:	-	(- 10.8%)	(- 5.4%)	(+ 0.3%)

Privately-owned fleets account for a large proportion of this traffic.

2.3 Geographical pattern of transport



In Europe, over 50% of the total volume of the traffic in this category is carried from the Netherlands to Germany. Some 70% of the goods carried on this route come from Rotterdam and some 60% are bound for "Nordrhein-Westfalen". This figure is tending to increase compared with other regions of Germany, e.g. the "Rhein-Pfalz-Saar-Gebiet".

Volume of NST 3 goods carried by inland waterway between the Netherlands and Germany:

	1978	1979	1980	1981
Million tonnes:	18.6	13.8	12.7	12.9
Growth rate:	-	(-26%)	(-8.4%)	(+2.2%)

Traffic between Belgium and Germany is also heavy:

	1978	1979	1980	1981
Million tonnes:	4	3.3	4.1	4.0
Growth rate:		(-19%)	(+24%)	(-1.7%)

Again many of the consignments are sent to "Nordrhein-Westfalen" (nearly 70% of total tonnage on this route).

The main factor affecting the origin of traffic to Germany is competition between the ports of Rotterdam and Antwerp; this has a similarly appreciable effect on traffic to and from the Netherlands and Belgium, which exhibits a rather different trend from all other routes within Europe:

	1978	1979	1980	1981
Million tonnes:	4.9	7.0	6.3	6.2
Growth rate:		(+43.5%)	(-10%)	(-0.7%)

3. Carriage of NST 4 goods

3.1 Type of goods

NST 4 contains the ores and metal waste used by the iron and steel industry:

- (i) iron-ore
- (ii) non-ferrous ores and waste
- (iii) iron and steel waste

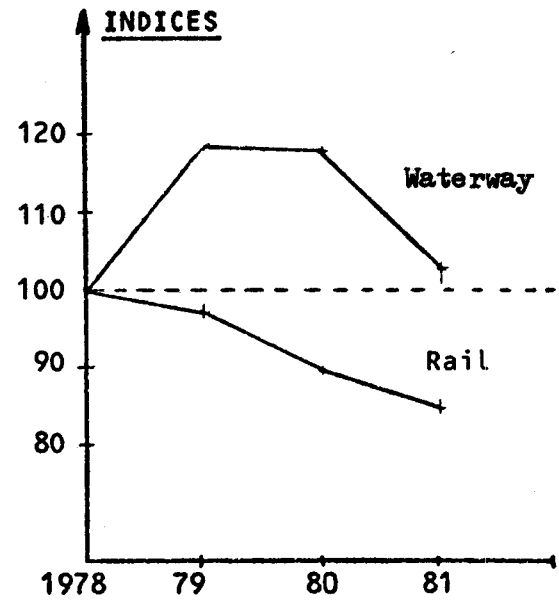
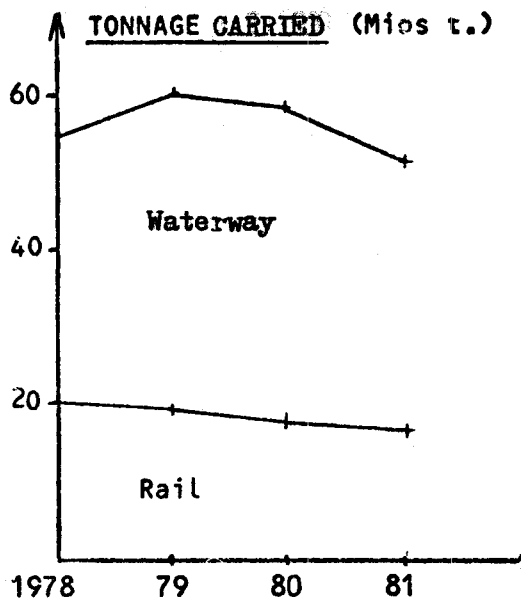
3.2 General developments

- 3.2.1 As these goods are raw materials for the steel industry, the quantities carried will obviously be determined by the situation of the steel industry, as with NST 2 goods (coke).

Here again, the estimates for 1980 and the forecasts for 1981 are based on steel industry production plans.

The fact that ores from non-member countries have been replacing Community ores for a number of years now has altered traffic flows and added to the problems arising from the crisis in the steel industry.

- 3.2.2 The chief modes of transport on this market are the railways and the inland waterways.



Traffic carried by these two modes combined reached a peak in 1979, after which the market can be expected to show a marked decline:

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Million tonnes:	54.8	60.8	58.9	51.9
Growth rate:	-	(+11%)	(-3%)	(-12%)

This trend is apparent in both the modes concerned even though the figure for the railways was not as favourable in 1979 as that for the inland waterways:

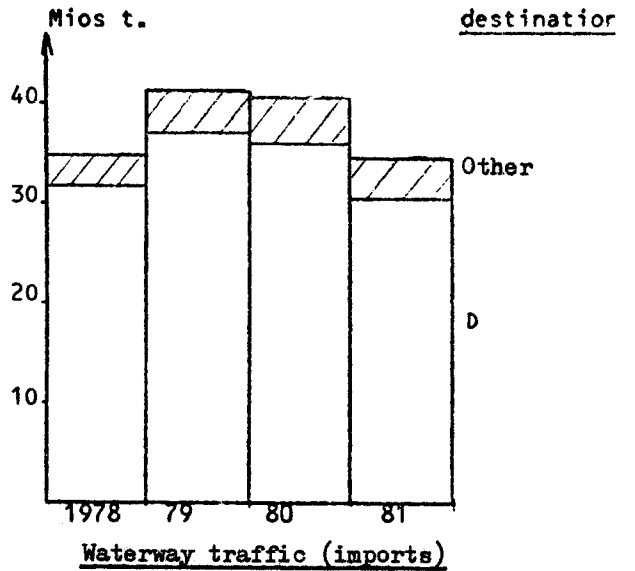
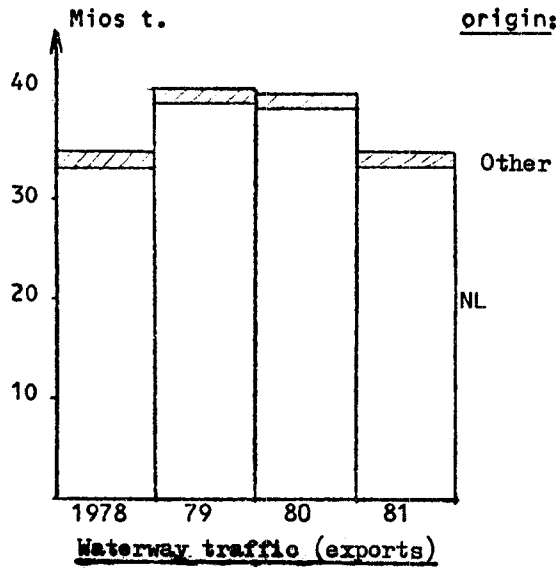
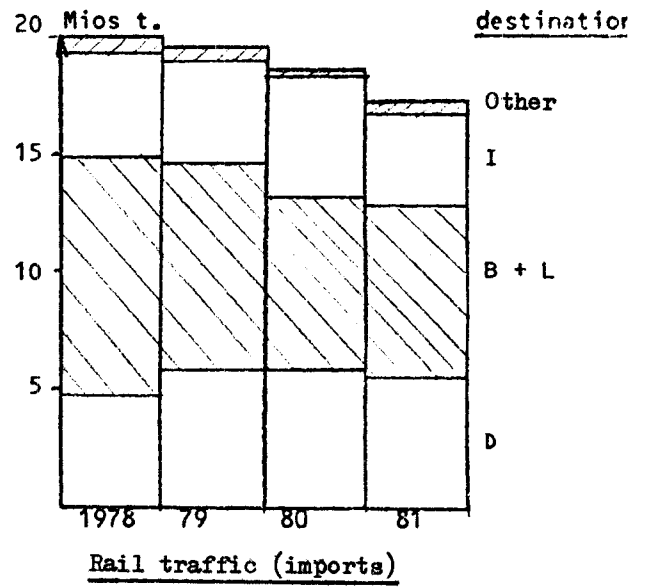
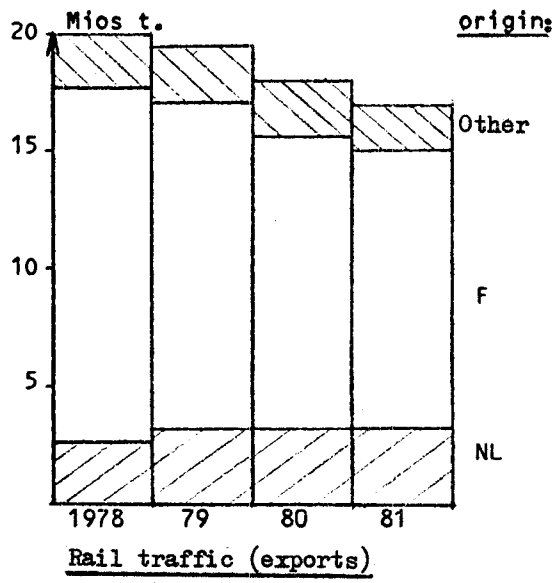
Waterway traffic

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Million tonnes:	34.8	41.3	40.9	34.9
Growth rate:	-	(+18.8%)	(-0.9%)	(-14.7%)

Rail traffic

Million tonnes:	20	19.5	18	17
Growth rate:	-	(-1.6%)	(-8%)	(-5.4%)

3.3 Geographical pattern of transport



In the case of the railways, most of the export traffic comes from France (70% in 1978). Nevertheless, the volume of traffic from France dropped considerably over the period considered¹.

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Million tonnes:	15.2	13.9	12.5	11.8
Growth rate:	-	(-8.3%)	(-10.5%)	(-5.4%)

Apart from the crisis in the steel industry, the reason for this drop is that the countries of the Community are increasingly forsaking the iron-ore mined in Lorraine. Traffic between France and Belgium/Luxembourg has been most affected; in 1978 the volume involved stood at 10 million tonnes but by 1981 it had dropped to 6.6 million tonnes. NST 4 goods are also transported by rail to Italy. The goods come from Germany and France and are basically ferrous scrap for Italian manufacturers with electric furnaces.

The trend for traffic from Germany and France to Italy is as follows:

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Million tonnes:	4.4	4	3.6	3.5
Growth rate:	-	(-9%)	(-10%)	(-3%)

¹The figures used include traffic on private networks which are of particular significance between France and Luxembourg.

In the case of the inland waterways, most of the goods in this category are carried between the Netherlands and Germany, this flow alone accounting for more than 80% of inland waterway traffic in this category between the Member States:

Developments in the carriage of NST 4 goods by waterway from the Netherlands to Germany:

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Million tonnes:	31.2	36.7	35.6	30
Growth rate:	-	(+17.6%)	(-2.8%)	(-15.7%)

The principal destination is "Nordrhein-Westfalen". Throughout the period considered this region has continued to receive the same proportion of imports.

4. Carriage of NST 5 goods

4.1 Type of goods

NST 5 contains the following metal products:

- (i) pig iron and crude steel;
- (ii) semi-finished rolled steel products;
- (iii) sections;
- (iv) steel plates and sheets;
- (v) tubes and pipes;
- (vi) non-ferrous metals.

4.2 General developments

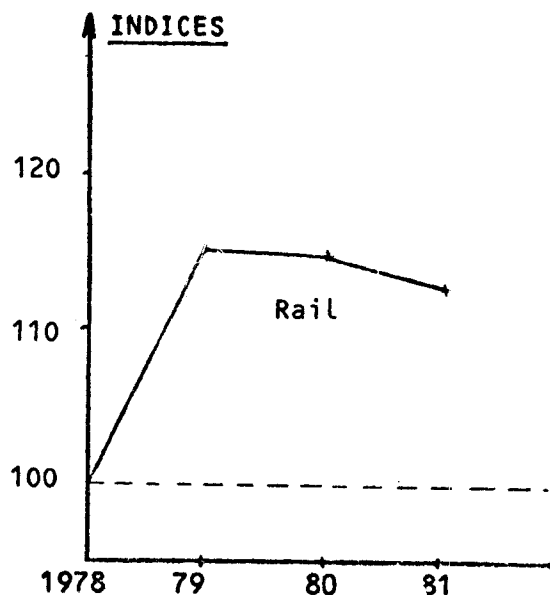
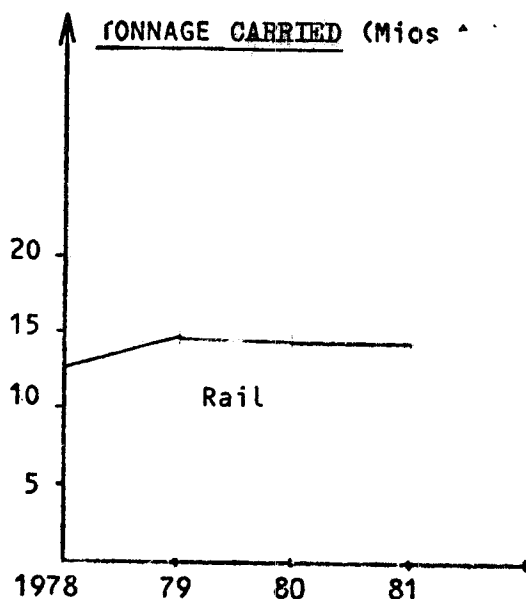
4.2.1 The forecasts for the carriage of NST 5 goods have been based on forecasts for the two leading customers for this type of product (the motor industry and the building industry).

The former uses thin sheets (and was, in fact, the key industry taken into account in the forecasts), while the latter uses concrete reinforcing bars and sections for metal structures.

It has been assumed that activity in the motor industry as a whole was approaching the bottom of the cycle and that the industry was affected above all by customers delaying their purchases. Since the building industry is much more responsive to economic decisions, we have focused our attention on the precise nature of the individual national policies and on the trend in a number of Member States towards housing and away from infrastructure projects.

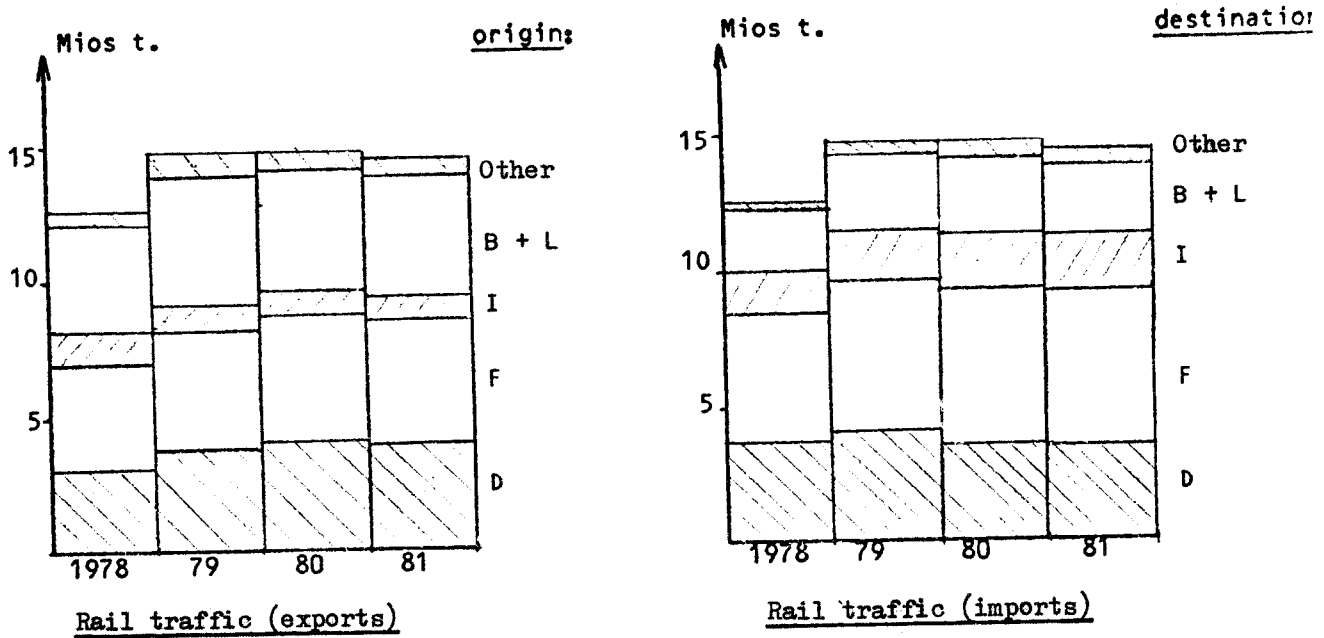
It should also be borne in mind that another user of this type of product - the shipbuilding industry - is suffering, and will continue to suffer in 1981, from depressed demand due to a combination of fierce competition from non-member countries and the general recession in world trade.

4.2.2 Because of their bulkiness and dispersed nature, goods in this category lend themselves to carriage by rail in particular. The forecasts for the main industrial customers suggest that the carriage of NST 5 goods by rail can be expected to develop as follows:



	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Million tonnes:	12.8	14.8	14.75	14.5
Growth rate:	(+9.9%)	(+15.3%)	(-0.3%)	(-1.8%)

4.3 Geographical pattern of rail transport



The figures illustrate that this traffic is spread over a fairly limited geographical area, the bulk being in Germany, Belgium/Luxembourg, France, and Italy.

There are only a small number of regions of origin, corresponding to the steel-producing regions. The individual regions' share of the supply has remained stable since 1978. At most there has been a very slight shift away from "France Nord-Est" and "Belgium/Luxembourg" and towards the German region "Nordrhein-Westfalen".

5. Carriage of NST 6 goods

5.1 Type of goods

NST 6 contains the following categories of building materials:

- (i) sand and gravel;
- (ii) salts, iron pyrites and sulphur;
- (iii) other stone, earths and minerals;
- (iv) cement and lime;
- (v) plaster and other manufactured building materials.

5.2.1 Obviously, the key industry taken into account in the traffic forecasts for goods in this category is the building industry, which can be divided into the following three subsectors:

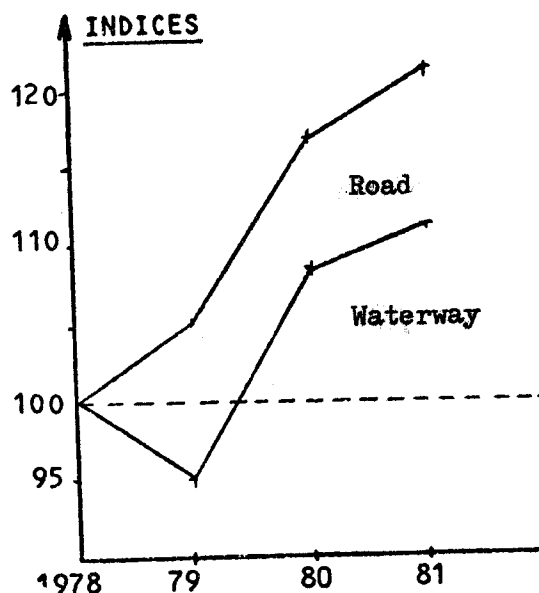
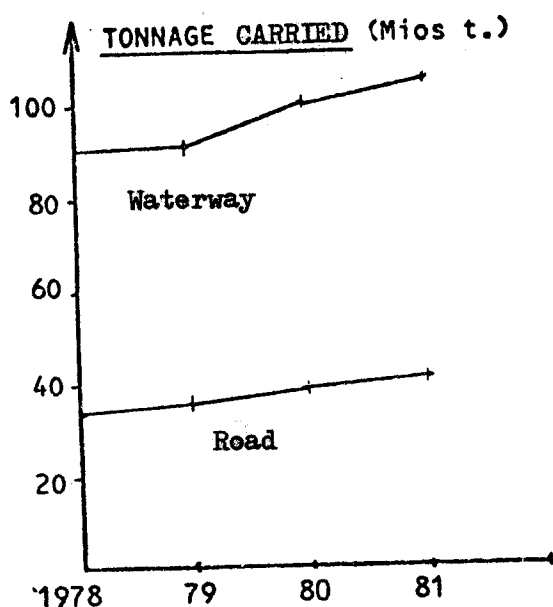
- (i) housing construction;
- (ii) public works;
- (iii) industrial construction.

The first of these subsectors is of particular significance to the category of goods in question since it accounts for a large proportion of the total consumption of sand, gravel and cement.

The estimates and forecasts are based on orders placed (for example, as indicated by the number of applications for planning permission) or on the general direction of the relevant national policies.

At present, governments in a number of countries are looking for ways of containing their infrastructure expenditure and providing incentives for housing construction. This has helped, and will continue to help, to offset the effects which the recession has had on the housing sector because of the situation on the money markets.

5.2.2 In terms of transport the situation is as follows:



If we consider only the two main modes of transport for this category - road and inland waterways - it can be seen that, following appreciable growth in 1980, international traffic between Member States will remain buoyant in 1981, even though the growth rate will be low.

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Million tonnes:	91	90	101.5	104.5
Growth rate:	-	(-1%)	(+12.8%)	(+3%)

There has been no contraction of international road haulage operations, nor is there likely to be in 1981, when the growth rate will again be higher than the growth rate for traffic as a whole:

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Million tonnes:	33.4	35.2	39.1	40.6
Growth rate:	-	(+5.1%)	(+11.2%)	(+3.8%)

A similar pattern can be discerned for inland waterway traffic in 1980 and 1981:

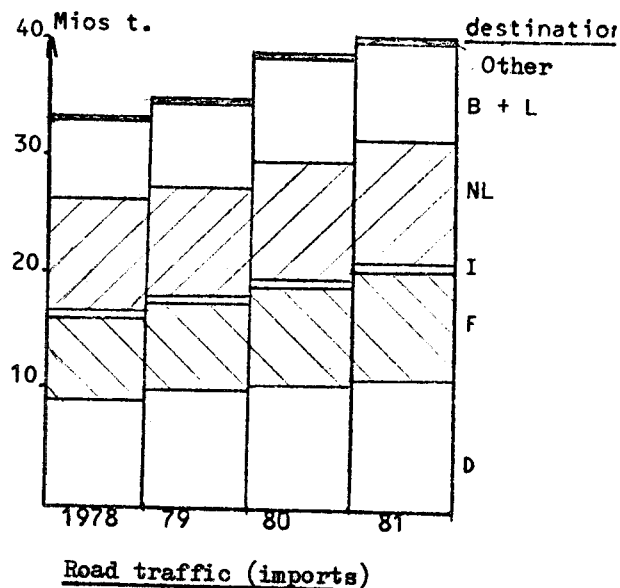
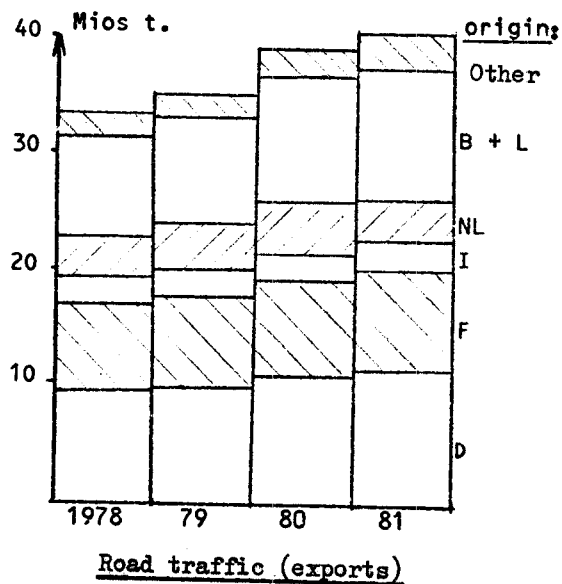
	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Million tonnes:	57.5	54.8	62.4	63.9
Growth rate:	-	(-4.7%)	(+13.8%)	(+2.5%)

In terms of tonnage, transport operations involving NST 6 products account for 22% of all road haulage operations between Member States and 30% of all inland waterway operations within the Community.

These proportions have remained stable throughout the period considered.

5.3 Geographical pattern of transport

There is a very broad geographical spread, with each Member State taking a share. The major routes are in north-west Europe (Belgium, the Netherlands, France and Germany in particular).



Road transport is used mainly for extremely short runs in the immediate vicinity of building sites. However, now that wider use is being made of certain NST 6 goods with a high value added it has become viable to increase the average length of haul. What is more, there have been no major changes in the geographical pattern of international road haulage operations for this category and developments on the various routes have been broadly similar.

NST 6 goods are shipped along two inland waterway routes (the Rhine and the north/south routes along the canals to the west of the Rhine).

The Rhine accounts for 65% of the total tonnage carried, while the north/south route carries the remaining 35%. These percentages have remained fairly steady, with the tonnages as follows:

Rhine traffic

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Million tonnes:	37.5	35.7	40.8	41.2
Growth rate:	-	(-4.8%)	(+14.2%)	(+1.1%)

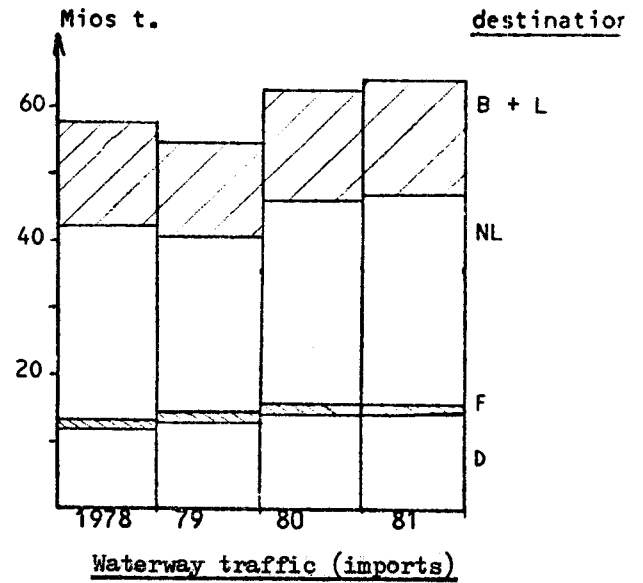
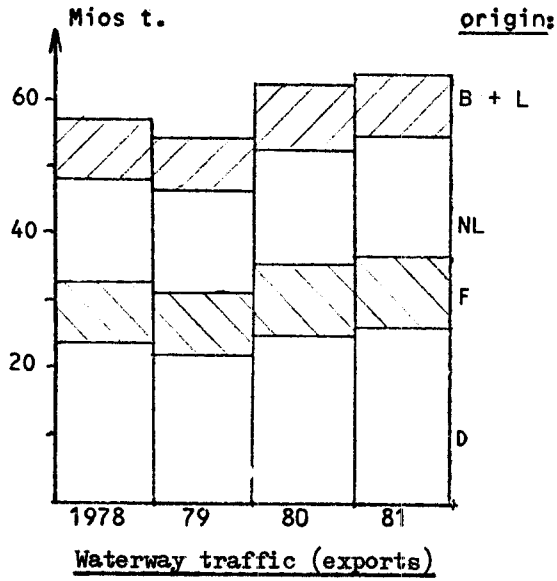
North/South traffic

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Million tonnes:	20	19.1	21.6	22.7
Growth rate:	-	(-4.5%)	(+13.2%)	(+4.9%)

The downturn in 1979 can be attributed largely to inclement weather.

The most important route for Rhine traffic is that between Germany and the Netherlands (almost 60% of all NST 6 goods carried on the Rhine).

The Netherlands-Belgium route accounts for 64% of the north/south traffic. There has been no significant change in the geographical distribution of this traffic between 1978 and 1981.



6. Carriage of NST 9 goods

6.1 Type of goods

NST 9 contains a wide range of products, namely:

- (i) vehicles and transport equipment;
- (ii) agricultural machinery;
- (iii) parts, engines, etc.;
- (iv) manufactures of metal;
- (v) glass, glassware and ceramic products;
- (vi) textiles;
- (vii) other manufactured articles (paper, paperboard, furniture, etc.);
- (viii) miscellaneous articles (packing containers, removal equipment, etc.).

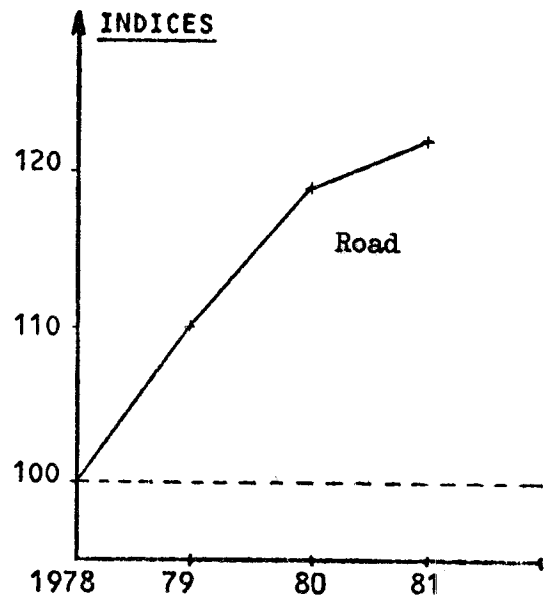
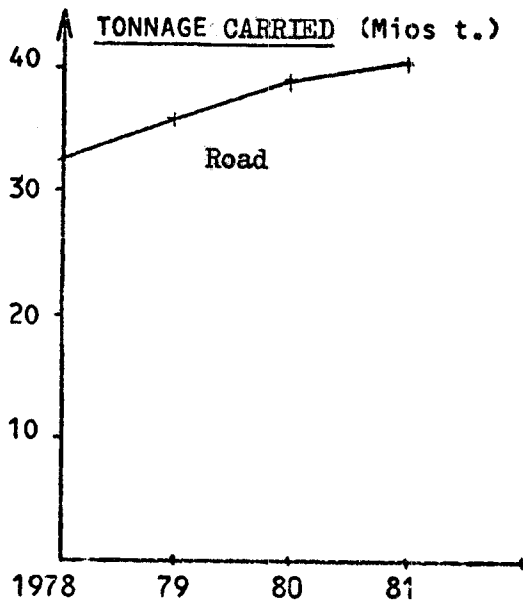
6.2 General developments

6.2.1 The most distinctive feature of transport operations involving goods in this class is that they are not very responsive to cyclical variations. On the other hand, they are extremely responsive to stockpiling (a factor which is difficult to allow for in models) and to the accelerator effects due to the opening-up of frontiers.

This analysis has been confined to road transport which is by far the most significant mode on this market.

The relevant gross national product forecasts were used to determine activity; the analysis of the consumer goods and capital goods industries went deeper.

6.2.2 The analysis revealed the following trends for the carriage of NST 9 goods:

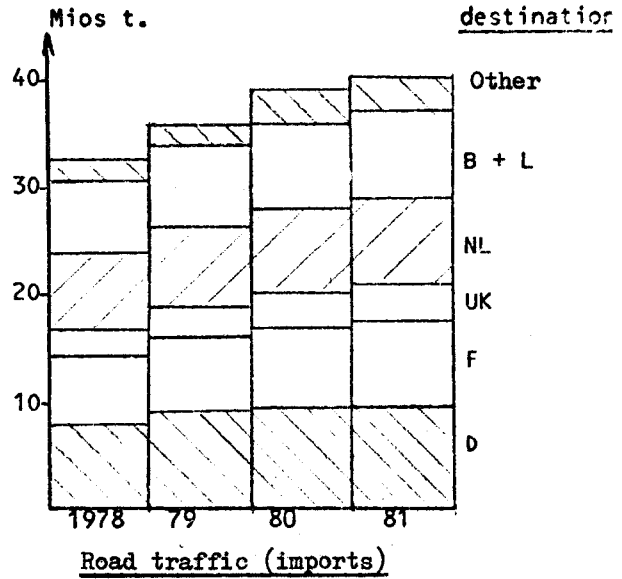
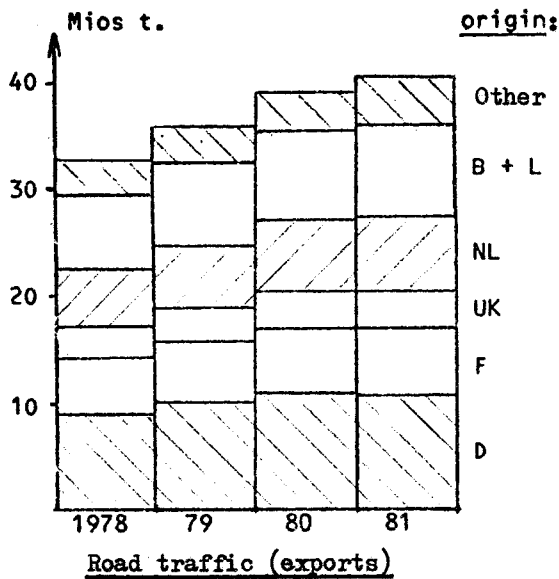


Although the growth rate for this type of transport is still positive, it is declining in terms of absolute value in line with the demand for finished goods. The values in real terms are set out below:

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Million tonnes:	32.7	36	38.9	40
Growth rate:	-	(+10.1%)	(+8%)	(+2.8%)

6.3 Geographical pattern of transport

The fact that the industries which generate this class of transport are not bound by geographical constraints to any significant degree means that NST 9 road haulage operations are an extremely diffuse picture, being spread throughout the Community.



Traffic between the six founding Member States has developed along the general lines described above:

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Million tonnes:	26.8	29.2	31.2	32
Growth rate:	-	(+9.1%)	(+6.8%)	(+2.6%)

On the other hand, the effects of the recession on the (roll-on/roll-off) routes to and from the United Kingdom and Ireland have to a large extent been offset by the increase in trade following membership of the Community. The situation on these two routes is as follows (combined tonnage for the two routes):

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Million tonnes:	4.7	5.4	6.2	6.4
Growth rate:	-	(+15%)	(+14%)	(+3.3%)

The gloomy picture as regards road links with Denmark reflects the Danish policy of striving for an even trade balance. On the export side, the figures provide further evidence of the persistence of accelerator effects similar to those observed in the case of Ireland and the United Kingdom.

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Traffic from Denmark (million tonnes)	0.49	0.70	0.97	1.05
Growth rate	-	(+45%)	(+37%)	(+8.7%)
Traffic to Denmark (million tonnes)	0.69	0.76	0.75	0.75
Growth rate	-	(+9%)	(-1.1%)	(+0.2%)

STATISTICAL ANNEX

INTERNATIONAL GOODS TRAFFIC BETWEEN THE MEMBER COUNTRIES OF THE EUROPEAN COMMUNITIES

MODE OF TRANSPORT: RAILWAYS *

QUANTITIES OF GOODS: METRIC TONS

NST/R-CHAPTER: 0-9

von/from/ de/van/fra	nach/to/à a/naar/til	JAHR YEAR	ANNO JAAR	IRELAND	DANMARK	BELGIQUE- LUXEMBOURG	NEDERLAND	ITALIA	UNITED KINGDOM	FRANCE	BUNDESREPUBLIK DEUTSCHLAND	CE EC EG EF
IRELAND		1978			2 442	53 029	70 461	6 152	609 314	92 121	30 684	864 203
		1979			3 575	52 792	83 496	9 823	598 275	82 103	36 174	866 238
		1980			3 922	77 191	114 473	13 900	572 700	109 553	54 839	946 578
DANMARK		1978		2 983	4 035	92 233	127 637	16 123	585 300	119 701	65 534	1 010 563
		1979		8 331	157 437	209 318	224 526	275 747	196 586	2 726 906	2 946 095	3 793 503
		1980		10 788	159 557	225 792	262 569	514 018	2 946 095	2 726 906	3 793 503	
BELGIQUE- LUXEMBOURG		1978		12 201	172 253	247 887	280 409	271 355	3 403 530	3 403 530	5 116 108	5 116 108
		1979		55 051	178 193	263 009	294 574	839 278	283 123	3 718 936	5 829 314	
		1980		57 920	237 006	22 404 950	23 793 800	2 039 594	21 660 136	22 424 960	70 622 546	
NEDERLAND		1978		61 900	282 899	423 300	25 479 111	2 703 258	2 583 822	25 903 087	24 544 957	81 400 213
		1979		17 244	318 441	33 079 570	26 430 904	1 632 493	2 662 060	27 181 910	25 082 128	84 436 491
		1980		44 083	375 361	37 505 000	1 095 714	1 924 362	2 464 428	8 109 605	84 838 865	130 258 480
ITALIA		1978		78 828	451 845	46 312 308	1 107 107	2 156 878	2 560 541	13 004 722	85 484 417	150 113 550
		1979		111	223 216	977 769	1 107 107	459 175	5 147 716	7 510 967	7 510 967	15 426 061
		1980		183	232 408	1 068 843	1 095 714	466 551	5 438 441	7 510 967	7 510 967	15 819 202
UNITED KINGDOM		1978		399	233 574	1 181 849	1 159 607	421 415	4 081 981	5 359 576	7 856 788	16 158 640
		1979		532 744	546 123	2 518 172	1 756 839	304 384	4 214 15	5 302 824	8 037 908	16 337 576
		1980		573 422	571 434	2 839 545	1 894 342	300 314	4 214 15	1 204 134	598 742	7 481 188
FRANCE		1978		59 851	557 249	3 413 413	2 108 329	312 695	1 493 922	1 298 402	791 021	8 714 647
		1979		30 795	259 772	29 908 764	5 689 026	11 286 726	1 694 815	1 320 666	870 306	9 234 233
		1980		45 263	318 287	28 914 306	6 076 265	11 933 531	1 694 815	27 782 223	27 782 223	76 451 228
BUNDESREPUBLIK DEUTSCHLAND		1978		18 558	347 568	26 975 063	6 774 100	13 183 298	1 538 773	1 180 918	31 180 918	79 818 262
		1979		28 136	2 071 199	25 333 465	54 716 557	7 763 857	808 163	18 719 823	31 916 430	81 000 491
		1980		28 502	2 279 518	26 453 439	51 149 144	9 184 873	1 010 833	21 122 165	109 431 620	
CE		1978		32 378	2 133 830	28 073 335	57 159 996	9 617 766	935 039	21 379 896	119 355 240	111 228 110
		1979		677 486	3 678 199	28 806 365	59 659 054	9 680 312	999 623	21 568 683	122 850 250	119 355 240
		1980		757 338	4 054 170	96 993 482	85 954 308	22 999 187	7 947 875	55 130 121	145 913 350	614 328 830
EG		1978		832 682	3 094 949	103 102 930	92 782 919	27 615 097	9 329 742	60 623 108	152 189 790	434 066 700
		1979		897 132	4 011 000	106 959 420	96 492 640	28 347 138	9 907 843	65 912 340	134 824 850	458 415 508
		1980										

Symbols: "0" = Negligible
"." = Figure not available
"-" = Nil
"t" = Metric ton

Reference: Statistisches Amt der Europäischen Gemeinschaften - SAEG - (Luxembourg); Statistisches Bundesamt - STABU - (Wiesbaden) Kraftfahrt - Bundesamt - KfA - (Flensburg); Central Bureau voor de Statistiek - CBS - (Voorburg, Heerlen); Ministère des Transports, Département des Statistiques des Transports - DST - (Paris); Ministero dei Trasporti, Istituto Centrale di Statistica - ISTAT - (Roma); Department of Transport, Central Statistical Office - CSO - (London); Institut National de Statistique - INS - (Bruxelles), Central Statistics Office - CSO - (Dublin); Danmarks Statistik (København).
*) Includes ferry traffic.

INTERNATIONAL GOODS TRAFFIC BETWEEN THE MEMBER COUNTRIES OF THE EUROPEAN COMMUNITIES

NSY/R-CHAPTER: 0-9

QUANTITIES OF GOODS: METRIC TONS

MODE OF TRANSPORT: ROAD (#)

von/ from/ de/da/van/fra	nach/to/à a/naar/till	JAHR JAAR	ANNO ANNEE	IRELAND	DANMARK	BELGIQUE- LUXEMBOURG	NETHERLAND	ITALIA	UNITED KINGDOM	FRANCE	BUNDESREPUBLIK DEUTSCHLAND	CE EC EG EF
IRELAND		1978		██████████	2 360	52 777	70 461	6 152	609 314	91 260	30 684	863 008
		1979		██████████	3 247	52 388	83 496	9 823	598 275	81 431	36 174	864 834
		1980		██████████	3 708	76 696	114 473	13 900	572 700	108 659	54 839	944 945
		1981		██████████	3 838	91 652	127 637	16 123	585 300	118 623	65 534	1 008 707
DANMARK		1978		██████████	██████████	94 491	208 000	177 953	275 336	181 189	2 532 963	3 472 554
		1979		██████████	██████████	111 346	223 000	201 421	507 645	214 263	2 710 946	3 975 416
		1980		██████████	██████████	122 258	245 000	216 326	728 471	249 616	3 136 565	4 707 837
		1981		██████████	██████████	127 148	260 000	228 440	837 741	259 601	3 428 265	5 152 093
BELGIQUE- LUXEMBOURG		1978		██████████	190 678	██████████	9 217 000	963 455	1 876 998	12 429 292	8 409 133	35 138 944
		1979		██████████	207 097	██████████	9 759 000	1 233 895	2 220 638	9 007 851	9 007 851	35 527 640
		1980		██████████	214 345	██████████	10 081 000	1 438 722	2 384 965	15 118 244	9 593 361	38 887 766
		1981		██████████	217 561	██████████	10 181 000	1 546 626	2 492 288	16 010 220	9 804 415	40 310 782
NETHERLAND		1978		██████████	308 011	8 374 000	██████████	1 200 975	2 262 060	3 447 660	13 110 341	28 720 291
		1979		██████████	365 024	9 697 000	██████████	1 332 962	2 464 428	3 871 050	14 178 300	31 952 847
		1980		██████████	413 572	10 996 000	██████████	1 430 269	2 560 541	4 238 799	14 589 471	34 295 173
		1981		██████████	442 522	11 579 000	██████████	1 516 085	2 624 554	4 365 964	14 895 850	35 502 803
ITALIA		1978		██████████	132 101	720 752	643 151	██████████	23 877	3 439 331	5 029 208	9 988 531
		1979		██████████	141 503	802 169	634 983	██████████	21 780	3 784 041	5 159 627	10 544 286
		1980		██████████	147 588	861 530	692 766	██████████	22 564	3 893 778	5 474 364	11 092 890
		1981		██████████	149 801	891 683	703 158	██████████	22 903	3 913 247	5 665 967	11 347 158
UNITED KINGDOM		1978		██████████	544 390	2 247 670	1 756 889	64 336	██████████	1 148 330	523 428	6 837 787
		1979		██████████	569 361	2 580 167	1 894 342	59 543	██████████	1 190 785	620 744	7 488 364
		1980		██████████	547 155	2 892 400	2 013 686	61 210	██████████	1 251 515	712 614	8 094 435
		1981		██████████	555 363	3 167 200	2 108 329	63 965	██████████	1 276 545	794 565	8 617 542
FRANCE		1978		██████████	195 820	11 540 651	2 162 605	3 750 629	1 351 853	11 571 119	11 571 119	30 600 791
		1979		██████████	241 687	11 715 806	2 393 165	4 375 831	1 493 800	12 158 592	12 158 592	32 419 390
		1980		██████████	262 714	12 557 200	2 491 285	4 970 944	1 423 591	12 693 570	12 693 570	34 447 467
		1981		██████████	270 595	12 946 473	2 516 198	5 159 840	1 622 894	13 061 684	13 061 684	35 634 516
BUNDESREPUBLIK DEUTSCHLAND		1978		██████████	1 416 693	7 677 912	15 978 001	4 266 192	701 204	7 047 819	██████████	37 106 379
		1979		██████████	1 676 828	8 461 416	16 614 629	4 709 822	846 195	8 060 546	██████████	40 397 572
		1980		██████████	1 594 663	9 104 484	17 478 589	5 063 059	819 117	8 713 450	██████████	42 801 864
		1981		██████████	1 586 690	9 322 991	18 020 425	5 164 320	878 913	9 061 988	██████████	44 067 705
CE EC EG EF		1978		██████████	2 790 053	30 708 253	30 036 107	10 429 692	7 100 642	27 784 881	41 206 876	150 728 285
		1979		██████████	3 204 707	33 418 292	31 602 615	11 923 297	8 152 761	30 246 330	43 872 234	163 170 349
		1980		██████████	3 183 745	36 610 568	33 116 799	13 194 430	8 511 949	33 574 031	46 254 784	175 272 377
		1981		██████████	3 226 370	38 126 147	33 916 747	13 695 399	9 064 593	35 006 188	47 716 280	181 641 306

Symbols: "o" = Negligible
"n" = Figure not available
"_" = Nil
"t" = Metric ton

Reference: Statistisches Amt der Europäischen Gemeinschaften - SAEG - (Luxembourg); Statistisches Bundesamt - SPAEU - (Wiesbaden) Kraftfahrt - Bundesamt - KBA - (Flensburg); Central Bureau voor de Statistiek - CBS - (Waarburg, Heerlen); Ministère des Transports, Département des Statistiques des Transports - DST - Service des Transports de Marchandises - SIM - (Paris); Ministero dei Trasporti, Istituto Centrale di Statistica - ISMIR - (Roma); Department of Transport, Central Statistical Office - CSO - (London); Institut National de Statistique - INS - (Bruxelles); Central Statistics Office - CSO - (Dublin); Danmarks Statistik (København).
#) Includes Ro/Ro-traffic.

MODE OF TRANSPORT: INLAND WATERWAYS

QUANTITIES OF GOODS: METRIC TONS

NST/R-CHAPTER: 0-9

von/from/ de/da/van/fra	nach/to/a a/naar/till ANNEE AR	JAHR YEAR ANNO	IRELAND	DANMARK	BELGIQUE- LUXEMBOURG	NEDERLAND	ITALIA	UNITED KINGDOM	FRANCE	BUNDESREPUBLIK DEUTSCHLAND	CE EC EG EF
IRELAND	1978	1978	██████████	82	252	██████████	██████████	██████████	861	0	1 195
	1979	1979	██████████	328	404	██████████	██████████	██████████	672	0	1 404
	1980	1980	██████████	214	495	██████████	██████████	██████████	924	0	1 633
DANMARK	1981	1981	██████████	197	581	██████████	██████████	██████████	1 078	0	1 856
	1978	1978	361	██████████	62 946	1 318	46 573	411	15 397	193 943	320 949
	1979	1979	1 536	██████████	48 211	2 792	61 148	6 373	16 800	235 149	372 009
BELGIQUE- LUXEMBOURG	1980	1980	1 187	██████████	49 995	2 887	64 083	1 415	21 739	266 965	408 271
	1981	1981	1 303	██████████	51 045	3 009	66 134	1 537	23 522	290 671	437 221
	1978	1978	2 663	66 328	██████████	1 659 950	817 394	162 596	5 505 619	3 553 412	11 767 962
NEDERLAND	1979	1979	2 935	66 530	██████████	1 818 800	1 083 782	207 553	6 576 200	3 936 760	13 692 560
	1980	1980	3 011	65 911	██████████	1 801 703	1 110 118	198 857	6 720 876	3 828 499	13 728 975
	1981	1981	3 228	65 338	██████████	1 783 326	1 156 632	201 204	6 969 548	3 776 431	13 955 707
ITALIA	1978	1978	██████████	10 430	845 570	██████████	431 718	██████████	666 554	3 610 564	5 564 836
	1979	1979	██████████	10 337	1 606 000	██████████	591 400	██████████	783 900	4 451 425	7 443 062
	1980	1980	██████████	9 728	1 464 833	██████████	620 142	██████████	1 048 074	4 677 112	7 819 889
UNITED KINGDOM	1981	1981	██████████	9 323	1 480 507	██████████	640 793	██████████	1 345 727	4 555 507	8 031 857
	1978	1978	██████████	91 115	257 017	463 956	██████████	435 298	1 708 385	2 481 759	5 437 550
	1979	1979	██████████	90 905	266 674	460 731	██████████	444 771	1 654 400	2 357 435	5 274 916
FRANCE	1980	1980	██████████	86 542	284 114	460 455	██████████	386 417	1 465 798	2 382 424	5 065 750
	1981	1981	██████████	83 773	290 166	456 449	██████████	398 512	1 389 577	2 371 941	4 990 418
	1978	1978	██████████	1 733	270 502	██████████	240 048	██████████	55 804	75 314	643 401
BUNDESREPUBLIK DEUTSCHLAND	1979	1979	██████████	2 073	259 378	██████████	240 771	██████████	51 687	86 638	640 547
	1980	1980	██████████	1 909	248 951	██████████	243 853	██████████	47 087	78 407	620 207
	1981	1981	██████████	1 886	246 213	██████████	248 730	██████████	44 121	75 741	616 691
CE	1978	1978	2 681	63 952	13 805 686	392 878	7 536 097	142 069	██████████	5 234 517	27 177 880
	1979	1979	2 754	76 600	13 032 200	632 100	7 577 700	201 015	██████████	6 561 654	28 084 023
	1980	1980	2 413	80 254	10 999 177	690 885	7 827 764	115 182	██████████	6 358 243	26 074 518
EC	1981	1981	3 019	76 973	10 372 224	705 394	8 023 458	121 287	██████████	6 434 542	25 736 897
	1978	1978	0	654 506	6 110 535	1 792 185	3 497 665	106 959	8 231 259	██████████	20 393 109
	1979	1979	0	602 690	7 483 336	2 242 984	4 475 051	164 638	9 694 811	██████████	24 663 510
EG	1980	1980	0	566 046	7 640 486	2 158 648	4 554 707	115 922	9 966 266	██████████	25 002 075
	1981	1981	0	547 140	7 724 531	2 134 687	4 515 992	120 710	10 036 030	██████████	25 079 090
	1978	1978	5 705	888 146	21 352 508	4 310 287	12 569 495	847 333	16 183 879	15 149 509	71 306 862
EF	1979	1979	7 225	849 463	22 696 203	5 157 407	14 029 852	1 024 350	18 778 470	17 629 061	80 172 031
	1980	1980	6 611	811 204	20 688 051	5 114 578	14 420 667	817 793	19 270 764	17 591 650	78 721 318
	1981	1981	7 550	784 630	20 165 267	5 082 865	14 451 739	843 250	19 809 603	17 504 833	78 249 737

Symbols : "0" = Negligible
 " ." = Figure not available
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INTERNATIONAL GOODS TRAFFIC BETWEEN THE MEMBER COUNTRIES OF THE EUROPEAN COMMUNITIES

NST/R-CHAPTER: 0-9

QUANTITIES OF GOODS: METRIC TONS

MODE OF TRANSPORT: ROAD (*) + RAILWAYS (***) + INLAND WATERWAYS

von/from/ de/da/van/fra	nach/to/à a/naar/til	ANNO YEAR JAAR ANNEE ÅR	IRELAND	DANMARK	BELGIQUE - LUXEMBOURG	NEDERLAND	ITALIA	UNITED KINGDOM	FRANCE	BUNDESREPUBLIK DEUTSCHLAND	CE EC EG EF
IRELAND		1978	██████████								
		1979	██████████								
		1980	██████████								
		1981	██████████								
DANMARK		1978		██████████							
		1979		██████████							
		1980		██████████							
		1981		██████████							
BELGIQUE- LUXEMBOURG		1978			██████████	11 528 000			3 725 225	10 462 415	25 715 640
		1979			██████████	12 216 000			3 738 700	9 740 015	25 694 715
		1980			██████████	13 596 408			4 063 967	11 123 097	28 783 472
		1981			██████████	14 466 578			4 202 142	11 501 282	30 170 002
NEDERLAND		1978			23 860 000	██████████			3 995 391	68 117 960	95 973 351
		1979			26 202 000	██████████			4 492 800	69 748 934	100 443 734
		1980			30 761 148	██████████			6 303 398	67 726 215	104 790 761
		1981			33 252 801	██████████			7 293 031	66 033 060	106 578 892
ITALIA		1978					██████████				
		1979					██████████				
		1980					██████████				
		1981					██████████				
UNITED KINGDOM		1978						██████████			
		1979					██████████				
		1980					██████████				
		1981					██████████				
FRANCE		1978			4 562 427	3 133 543			██████████	10 976 587	18 672 557
		1979			4 168 300	3 051 000			██████████	11 199 543	18 418 843
		1980			3 734 797	3 432 375			██████████	12 129 105	19 296 277
		1981			3 656 366	3 552 508			██████████	12 420 204	19 629 078
BUNDESREPUBLIK DEUTSCHLAND		1978			11 543 018	36 946 371			3 440 745	██████████	51 932 134
		1979			10 508 687	32 291 531			3 366 808	██████████	46 167 026
		1980			11 328 365	37 522 759			2 700 180	██████████	51 551 304
		1981			11 758 843	39 473 942			2 470 665	██████████	53 703 450
CE EC EG EF		1978			39 967 645	51 607 914			11 161 361	89 556 962	192 293 682
		1979			40 878 987	47 558 531			11 598 308	90 688 492	190 724 318
		1980			45 824 310	54 551 542			13 067 545	90 978 417	204 421 814
		1981			48 668 010	57 493 028			13 965 838	89 954 546	210 081 422

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 "—" = Nil
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Reference:

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*) Includes RO/RO-traffic.

**) Includes ferry traffic.

Regional subdivisions used for forecasting purposes



KEY

Region 1	<u>Country</u>	Ireland Eire	(IRL)
2	<u>Land</u>	Danmark	(DK)
3	<u>Pays</u>	Luxembourg	(L)
4	<u>Pays</u>	Belgique	(B)
		Belgique + Luxembourg	(B + L)
5		Rotterdam	
6		Rest van Nederland	
	<u>Land</u>	Nederland	(NL)
7		Italia Nord-Ovest	
8		Italia Nord-Est	
9		Italia Centrale	
10		Italia Sud	
11		Sardegna + Sicilia	
	<u>Paese</u>	Italia	(I)
12		Northern Ireland	
13		Scotland	
14		Wales	
15		Northern England	
16		Midlands and East Anglia	
17		Southern England	
	<u>Country</u>	United Kingdom	(UK)
18		France Nord-Ouest	
19		Région Parisienne	
20		France Sud-Ouest	
21		France Centre	
22		France Sud-Est	
23		France Nord-Est	
	<u>Pays</u>	France	(F)
24		Norddeutsche Küstenländer	
25		Nordrhein-Westfalen	
26		Hessen	
27		Rhein-Pfalz-Saar-Gebiet	
28		Baden-Württemberg	
29		Bayern	
30		West-Berlin	
	<u>Land</u>	Bundesrepublik Deutschland	(DE)

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This report is one of the information elements resulting from the observation of the market system of goods transport by rail, road and inland waterway between the Member States of the Community.

It analyses the developments which have had a significance on the transport market, in its entirety, during the course of the year.

It also reviews the developments which can be expected in 1981.

The analyses and forecasts are, at the same time, made for the submarkets corresponding to the most important categories of goods taking into account, as far as possible, the regional aspects of these markets.

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