



Inland Navigation - Difficult Times Are Ahead

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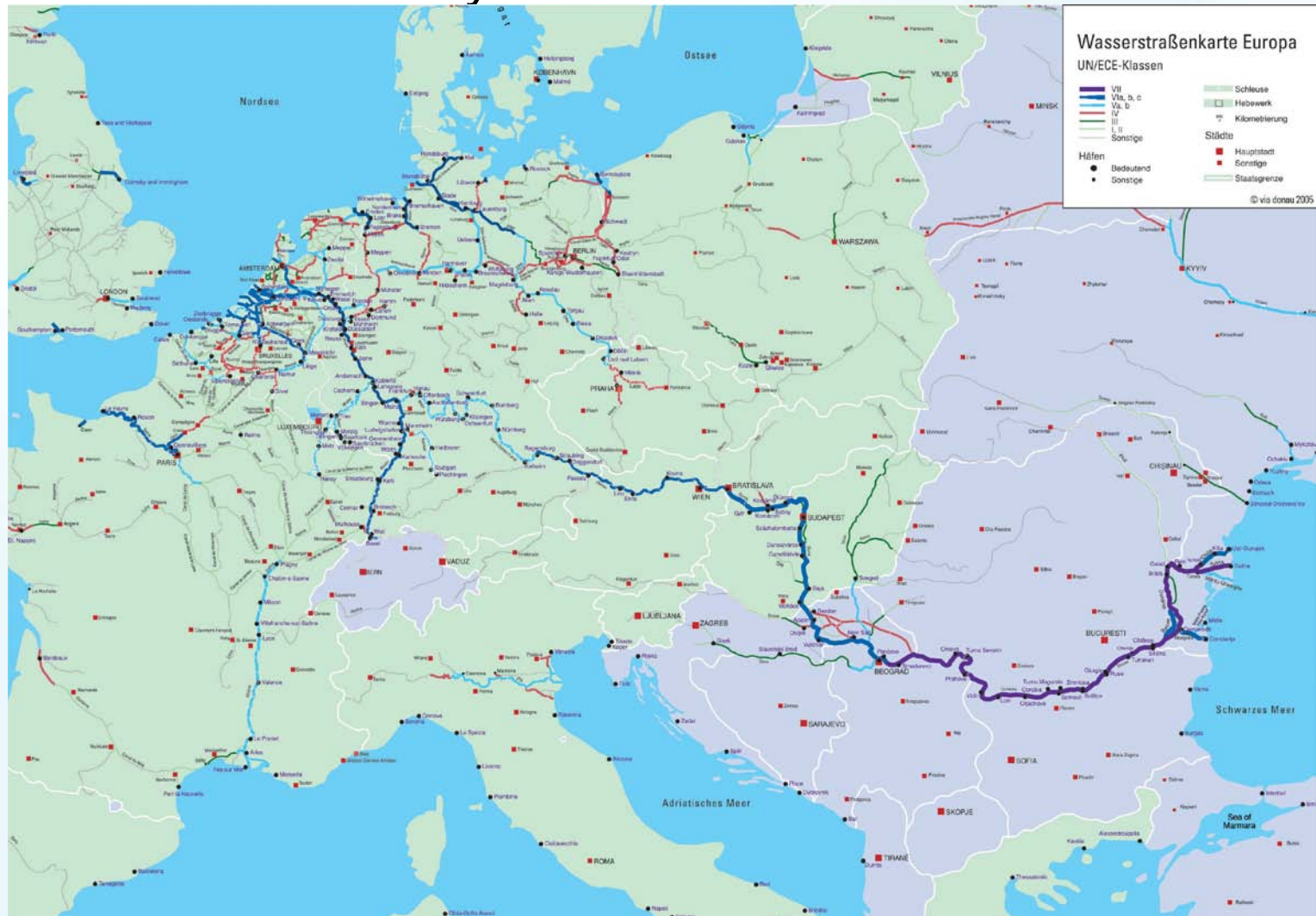
Structure of the Presentation:

- The Inland Waterway Network
- The Fleet
- The Environmental Impact of the different Traffic Modes
- The Inland Navigation Industry
- Transport Volume on IWW in Europe until 2008
- Development of the Sector in 2008/2009
- Prospects for 2010 and the Coming Years
- Answers to the Crisis
- Conclusion

Inland Navigation in Europe



■ The Inland Waterway Network



- The Fleet (Western Europe)
17.700 Vessels in Total

General Cargo Vessel	6.625	Push Barge	584
Push Freight Barge	3.250	Push /Tug Boat	1.239
Tank Vessel	1.692	Passenger Vessel	1.468
Push Tank Barge	158	Other	2.657

■ The Environmental Facts

- Average external costs of modalities (source: Planco 2007)
 - Road 2.00 cts/tkm
 - Rail 1.13 cts/tkm
 - Inland shipping 0.28 cts/tkm

- Energy consumption of modalities (Source: CBS/Lehmann/BVB)
 - Road 1.40 – 4.06 MJ/tkm
 - Rail 0.59 – 0.73 MJ/tkm
 - Inland shipping 0.43 – 0.48 MJ/tkm

■ The Key-Figures For The Inland Navigation Industry

Inland Navigation in Europe

- 130 billion tkm
- 500 million t
- 5,6 % of the total freight transport in EU-25
 - In various member states much higher:
Belgium and Germany 14 %, Netherlands 44 %

- The Inland Navigation Industry
 - Europe-27
 - 8.800 Enterprises
 - 43.492 Employees
 - 5.500 Mio. Euro Turnover
 - Rhine River Basin without CH (B, D, F, L, NL)
 - 5.852 Enterprises
 - 27.126 Employees
 - 4.480 Mio. Euro Turnover

Source: Eurostat for 2006)

■ The Transport Volume in the last 10 Years

– 1998	(B, CZ, D, F, L, NL)	733.073 Tto
– 2003	(B, CZ, D, F, L, NL)	725.091 Tto
– 2008	(B, CZ, D, F, L, NL)	821.592 Tto
– 2009	???	
– 2010	???	

Annotation: CH, I or other European Countries are not listed in the statistic of the EU

Source: Eurostat

■ The Transport Volume on the IWW in Germany

– 1998	236.365 Tto
– 2003	219.999 Tto
– 2007	248.974 Tto
– 2008	245.661 Tto

Source: Destatis

- The Development of the Transport Volume in '08/'09 on the German IWW

– **2009**

196.500 Tto = ./ 20 %

Source: ITP Gleitende Mittelfristprognose Sommer 2009

- The Reaction of the Sector
 - Strategies to overcome the times of economical crisis
 - Reducing costs by laying up ships
 - Reducing costs by shorting the operation hours
 - Reducing costs by shorting the crews
 - Looking for support by the EU and the Member States by
 - Investment in infrastructure
 - Avoidance and decrease of administrative burdens
 - Decrease of financial burdens
 - Assistance to find financial support

- Expectations for 2010 and the Coming Years
 - Transport Volume in 2010 on the German IWW

**Year 2010 197.800 Tto = + 0,5 %
but ./ 19,5 % compared to 2008!**

Years 2011 - ... ???

- Personal Conclusion:

NAVIGARE NECESSE EST

Inland Navigation in Europe



If the sun shines it is not hard to find friends, but ...

Inland Navigation in Europe



**... in times of
trouble you really
need reliable
partners!**

Thank You for Your Attention and Patience

Georg Hötte

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