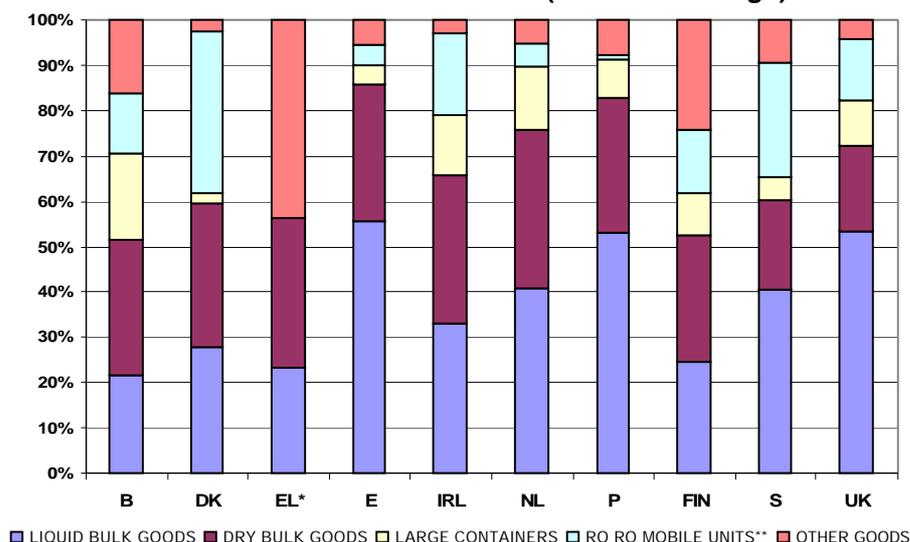


Maritime goods transport 1990-1997

High share of intra-EU shipping in most Member States

Franz Justen

Figure 1: Share of types of cargo handled (inward and outward) by selected Member States in 1997 (in% of total cargo)



* EL: reported only breakdowns of liquid and dry bulk goods as well as other goods.- Source: Eurostat (Maritime db)
 **: Ro Ro mobile units : roll on - roll off; either self-propelled or not.

Highlights

Between 1990 and 1997, an upward trend in maritime transport was registered in most Member States .

Spain, Sweden and Finland increased their volume of goods handled by around 20% between 1990 and 1997.

Portugal is the only country where maritime transport stagnates.

Liquid and dry bulk goods represent more than half of the volume of goods handled in ports of the reporting EU Member States and peaks at 86% for Spain.

Intra-EU shipping in reporting countries is of prime importance: in average, nearly 47% of the entire outward traffic has national or intra-EU destinations.

National maritime traffic can be important for some Member States: 42% of the entire cargo volume shipped from Danish ports has national destinations; 39% of Italian maritime traffic is national.

With 55% of the total volume, the Netherlands is the reporting Member State forwarding the highest share of the cargo to non-European destinations (Sweden is lowest with 10%).

32% of the total value of cargo entering the EU passes via the United Kingdom, 10% via Germany.

Transport equipment and other machinery are the most important goods groups for export by maritime transport mode.

Statistics in focus

TRANSPORT

THEME 7 – 5/2001

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Introduction

The content of this "Statistics in Focus" is largely based on data collected in the frame of the EU maritime Directive ("Council Directive 95/64/EC of 8.12.1995 on the statistical returns in respect of carriage of goods and passengers by sea" – OJ L320 of 30.12.1995, page 25). The data collection is relatively recent and not all Member States have reported so far. Data presented in all but the last chapter refer to those countries who have reported. Data for the last chapter, dealing with the value of

goods forwarded in maritime traffic, have been taken from Eurostat's Foreign Trade Statistics unit. Those data have proved helpful to complete the overview of maritime transport of goods at EU-level.

Apart from certain methodological particularities given in the commentary of the present report, Eurostat would like to emphasize on more detailed information given in the methodological notes part (page 7).

Transport of goods by Member States and by type of cargo

The evolution of the volume of goods is outlined in Table 1. Figures include volumes handled in smaller ports, for which detailed reporting is not compulsory. Although no recent data are available for certain countries, it appears that an upward trend is registered for all countries, except for Portugal, where the total volume handled in 1997 remained roughly the same as in 1990.

When 1990 data are compared to 1996, Spain, Sweden and Finland stand out with an increase of around 20%; Italy and the UK display a growth of around 10%. The 43% growth of Germany may be partly explained by the re-unification. Major Baltic ports like Rostock, Stralsund or Sassnitz contribute substantially to this increase.

Table 1: Total quantity of goods loaded and unloaded in Member States (in 1000 tonnes)

	1997			1996			1995			1990		
	loaded	unloaded	total									
EU-15	:	:	:	:	:	:	:	:	:	849815	1684149	2533964
Belgium	:	:	:	:	:	:	55459	102864	158323	55109	104058	159167
Denmark	:	:	:	32733	50441	83174	31063	48819	79882	29489	44786	74275
Germany	72851	140467	213318	72665	133348	206013	70488	130762	201250	46245	97706	143951
Greece	:	:	:	42437	58630	101067	43907	60540	104447	42897	55787	98684
Spain	100726	190630	291356	86821	184854	271675	86337	191997	278334	73337	155730	229067
France	95781	236029	332834	82382	215891	298273	81066	218913	299979	84317	213517	297834
Ireland	:	:	:	:	:	:	:	:	:	7570	18508	26078
Italy	:	:	:	127336	316182	443518	108550	294436	402986	109233	295767	405000
Luxembourg	-	-	-	-	-	-	-	-	-	-	-	-
Netherlands	:	:	:	84821	293303	378124	84095	295951	380046	91839	281251	373090
Austria	-	-	-	-	-	-	-	-	-	-	-	-
Portugal	14787	42500	57287	15301	40571	55872	16802	44095	60897	18343	39267	57610
Finland	36164	39018	75182	33345	36945	70290	34121	37035	71156	24047	34825	58872
Sweden	70965	79142	150107	68238	75706	143944	66415	77255	143670	53835	64691	118526
United Kingdom	:	:	:	263516	287721	551237	:	:	:	213554	278256	491810

Source: Eurostat (REGIO database)

Figure 1 on the previous page shows the share of the various types of cargo handled in individual Member States. For all countries that reported, bulk goods take an important share: dry and liquid bulk goods taken together represent between 51% (Belgium) and 86% (Spain) of the entire volume handled.

When looking at the other cargo types, ro-ro (roll on-

roll off) mobile units (self propelled or not) represent a substantial share for countries featuring important car ferry services like Denmark (35%), Sweden (25%), Ireland (18%) or the United Kingdom (13%). Large containers represent the highest share in Belgium (19%) followed by the Netherlands (14%) and Ireland (13%).

Transport of goods from selected Member States by destination

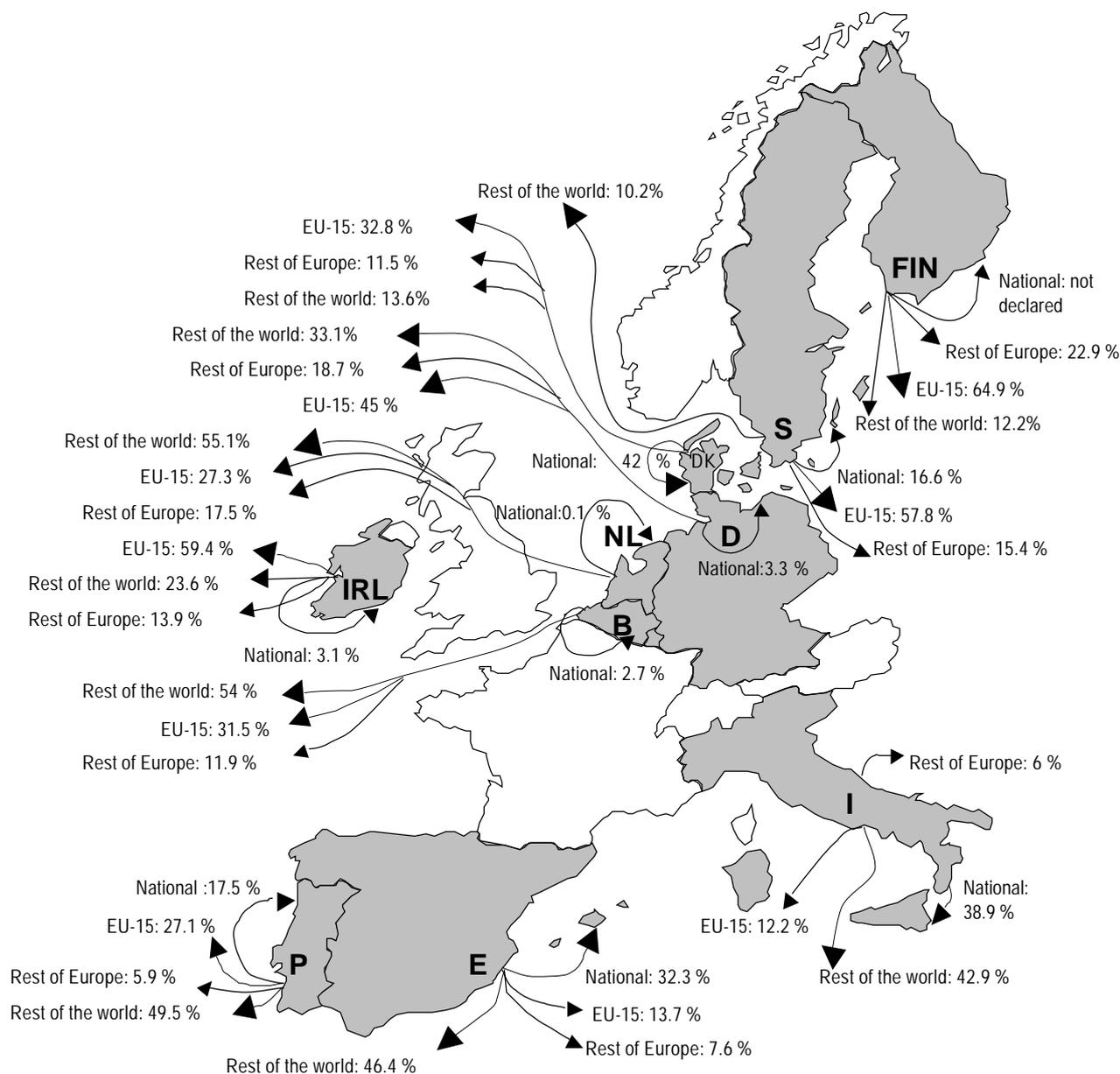
The outward traffic of the reporting countries show some interesting particularities. Figure 2 outlines the split in volume between National, EU-15, European and 'Rest of the world' destinations.

Intra-EU shipping is of prime importance: on average, 47% of the cargo of the reporting countries (10 Member States: B, DK, D, E, IRL, IT, NL, PT, FIN and S) in outward traffic has national or intra-EU destinations; 60% is forwarded within Europe (intra-EU and non-EU European countries).

The highest shares of intra-EU traffic are registered in Scandinavia, where Sweden and Denmark display shares close to 75%. Finland's intra EU-share is 65%. Belgium and the Netherlands are the only reporting countries with shares clearly under 40%.

When excluding national traffic, Spain and Italy show particularly low shares in outward intra-EU maritime traffic (14 and 12% respectively); high shares are registered in Finland (65%), Ireland (59%) and Sweden (58%).

Figure 2: Outward traffic: share of main destinations for selected Member States 1997 in % of total cargo



Source: Eurostat (Maritime database)

National traffic is important for certain countries: 42% of the goods (based on tonnes forwarded) shipped from Danish ports have national destinations. Italy and Spain also represent considerable shares for national traffic with 39% and 32% respectively. The three countries' geographical characteristics (Denmark being partly composed of important islands, Italy with Sicily and Sardinia and Spain with the Balears and the Canary Islands) explain this high share.

The Netherlands, with 55%, scores exceptionally high in relations with the 'rest of the world'. Other

important gateways are Belgium (54%), Portugal (49.5%) and Spain (46%). On the other end, Sweden sends only 10.2% of its cargo to the 'rest of the world'.

It should be recalled that Figure 2 highlights outward traffic only. The shares have been calculated on the basis of the gross weight of the cargo in tonnes. The image would change substantially if inward traffic would be taken: the share of 'rest of the world' traffic for the Netherlands for instance is substantially higher if loaded oil tankers would be included. In outward traffic, these vessels are generally empty.

Maritime traffic by type of vessel

Table 2 outlines the number of vessels leaving the various ports of certain reporting Member States. The EU maritime Directive asks for both inward and outward movements; it is assumed here that their number is the same.

The figures in Table 2 are those who have been reported. Due to various derogations granted to various Member States, methodological inconsistencies obviously remain. The consolidation of reporting procedures should improve the situation in the future.

In all cases the vessel-type 'cargo, non-specialized' appears to be the biggest group. Of all the reporting countries, the UK, the Netherlands and Finland show the highest number of movements, nearly four times the number registered in countries like Ireland or Belgium.

The Netherlands present a high absolute number of

liquid bulk vessels; this is certainly influenced by the outstanding role of Rotterdam as crude oil terminal. Although at a lesser degree, the same can be said for Belgium, where the port of Antwerp plays a major role.

Particularities also appear in the number of dry bulk goods vessels: Spain displays the highest number of movements. Dutch ports handled roughly 2800 vessels of this type in 1997, the United Kingdom follows with 1448 movements.

With 3293 vessels, Spanish ports handled roughly the same amount of dry bulk carriers as Belgium, Denmark, Ireland, Portugal and Finland together.

The Netherlands and Belgium confirm their position as European gateways when looking at vessels specialised in container transport. With respectively 4953 and 2678 movements, these countries score substantially higher than all other reporting Member States.

Table 2: Traffic by type of vessel for selected Member States 1997 – number of outward movements

	B	DK	E	IRL	NL	P	FIN	UK
LIQUID BULK	4 357	2 847	4 988	1 428	8 905	2 261	1 906	3 509
DRY BULK	175	1 283	3 293	668	2 833	508	766	1 448
CONTAINER	2 678	1 401	2 211	1 877	4 953	954	509	657
CARGO, SPECIALIZED	4 435	1 509	300	294	164	486	234	173
CARGO, NON-SPECIALIZED	6 915	401 257	16 394	5 721	23 974	5 009	22 420	88 281
DRY CARGO BARGE	0	658	0	0	0	3	592	293
PASSENGER	118	26 699	17 714	425	47	206	2 260	18 125
OFFSHORE ACTIVITIES	0	0	0	9	2 057	3	0	0
UNKNOWN	0	0	625	0	0	0	0	1

Source: Eurostat (Maritime database)

The intensity of vessel movements for a country like Belgium becomes obvious when considering that this country includes only 4 reporting ports (and a marine coastline of only 65 km; with Antwerp however located in a river estuary). Spain, for instance, with roughly 20 reporting ports distributed on both the Mediterranean and Atlantic coasts registered only

thirty percent cargo vessel movements more.

One should be aware that total outward movements of vessels are slightly higher than indicated since reporting on movements is not required for small ports.

Value of goods forwarded to and from Member States by type of goods

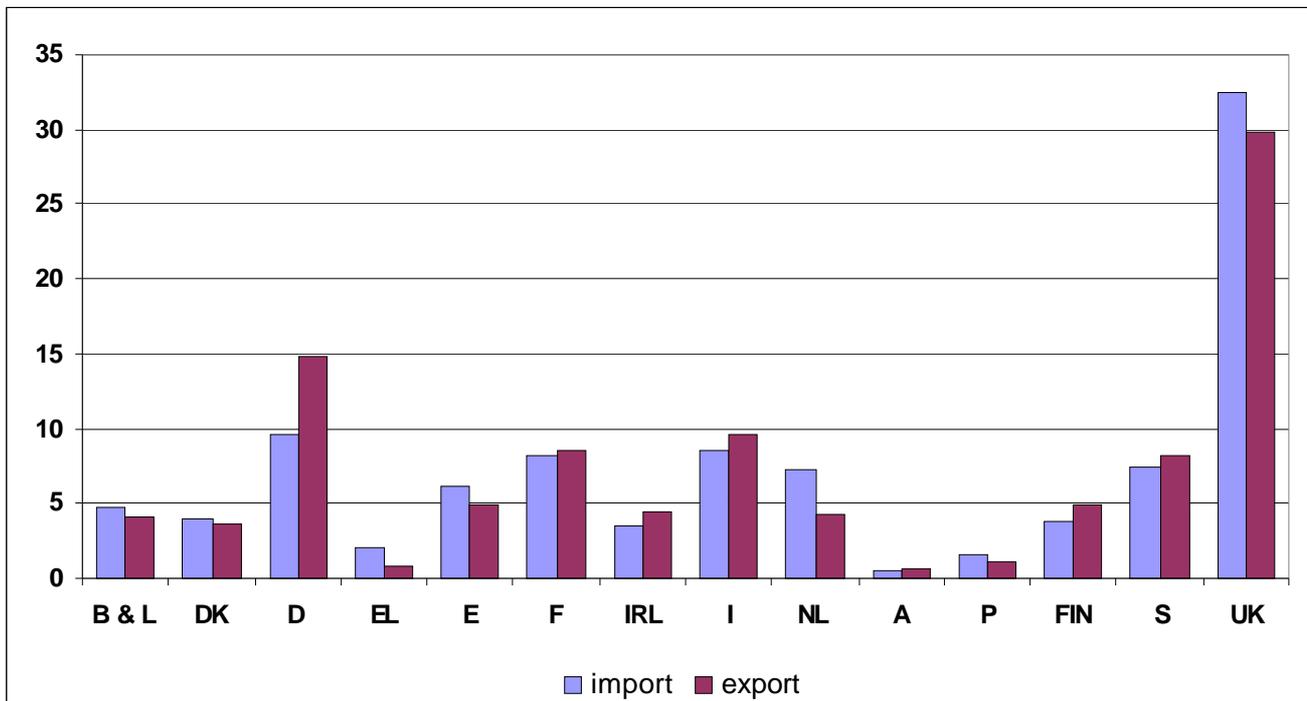
A different view on maritime traffic is obtained when looking at the value of the cargo handled in the ports of the Member States. Information in this chapter has been obtained from the foreign trade unit of Eurostat and covers all the Member States of the EU.

Figure 3 shows the shares of the Member States in the total value of goods using the maritime transport mode, both for the import and export of goods.

32% of the value of all goods entering the EU by maritime way arrive in the UK. Germany comes second with 10% followed by France and Italy with 8%.

On the export side, relations are the same: 30% of the value of all goods dispatched by maritime way are shipped in the United Kingdom. Germany comes second with 15%. Italy and France follow with 10% and 9% respectively.

Figure 3: Value of goods forwarded from and to the EU in 1997 : share of Member States - in %



Source: Eurostat (Comext)

When considering the value of imported goods, the Netherlands does not score exceptionally high: with 7%, it displays the same figure as for instance Sweden. This would for instance mean that important volumes of crude oil arriving in the port of Rotterdam do not represent an excessively high value.

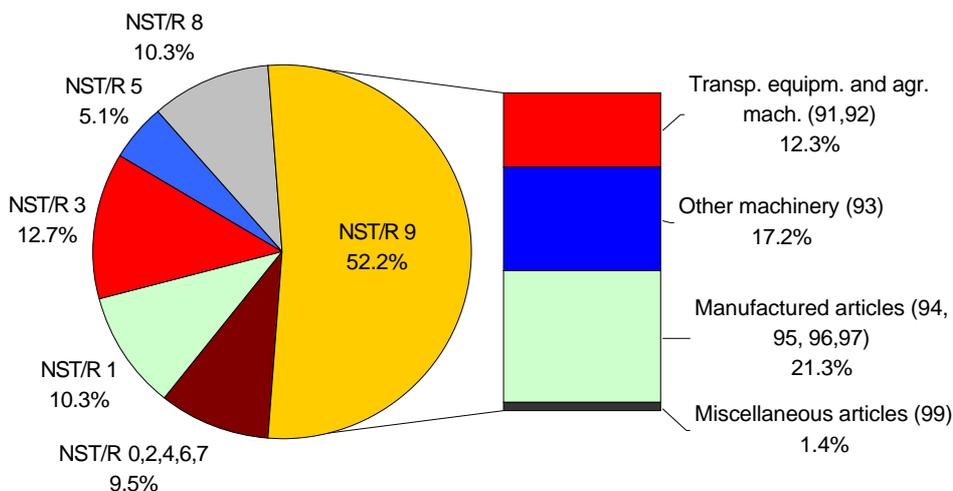
Furthermore, Figure 3 shows that the value of goods leaving the EU through Germany is substantially higher than the value of those entering.

The opposite can be said for the Netherlands and Greece. For all other countries, this relation is far more balanced.

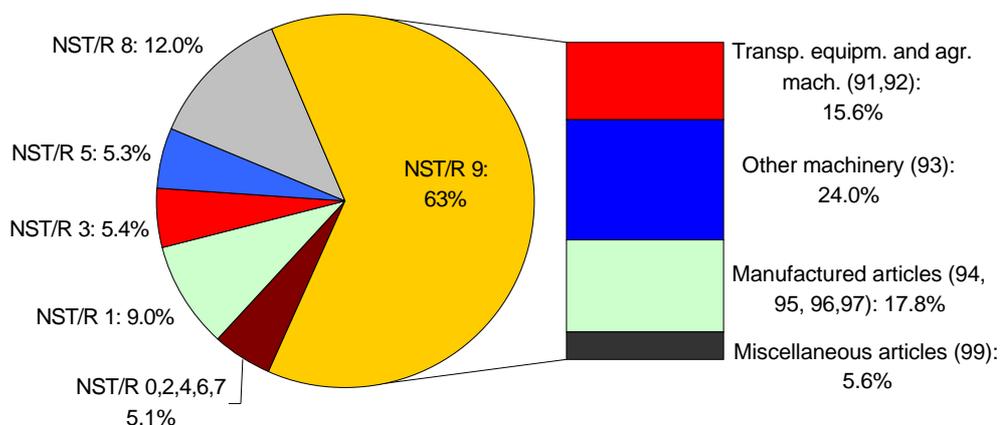
Since the notion of volume (weight) of goods is not considered, this could mean in the case of Germany for instance that a relatively small volume of high-value cargo quickly exceeds a large volume of low-value cargo.

Figure 4: Value of EU-15 imports and exports in 1997 : share by NST/R chapter * – in %

Value of EU-15 imports



Value of EU-15 exports



* : aggregated goods groups – see top of next page for short description
individual NST/R groups are in brackets

Source: Eurostat (Comext)

When exports and imports at EU-15 level are highlighted considering the type of goods handled, it appears that the category ‘Vehicles, machinery, engines manufactured and miscellaneous articles’ (NST/R chapter 9) is by far the most important, both for exports (63% of the total) and imports (52% of the total).

On the export side, ‘Coal, chemicals, tar, paper pulp’ (NST/R chapter 8) and ‘Foodstuffs and animal fodder’ (NST/R chapter 1) are other major goods groups with respectively 12% and 9% of the total value of exported goods. These same groups score high on the import side as well with both 10%

Since ‘Vehicles, machinery, engines manufactured and miscellaneous articles’ (NST/R chapter 9) has such a weight, a further split seems appropriate: in Figure 4 it appears that more than 15% of the entire value of EU-15 exports using the maritime transport mode consist of ‘Transport equipment and agricultural machinery’. The value of ‘Other machinery’ is even higher with 24%. ‘Manufactured articles’ represent nearly 18% of the value of EU exports.

With 21% of the total value, latter category represents the most valuable goods category for EU-15 imports. ‘Other machinery’ and ‘Transport equipment and agricultural machinery’ follow with 17% and 12% respectively.

NST/R chapters (Standard Goods Nomenclature for Transport Statistics/Revised)

NST/R 0:	Agricultural products and live animals
NST/R 1:	Foodstuffs and animal fodder
NST/R 2:	Solid mineral fuels
NST/R 3:	Petroleum products
NST/R 4:	Ores and metal waste
NST/R 5:	Metal products
NST/R 6:	Crude and manufactured minerals, building materials
NST/R 7:	Fertilisers
NST/R 8:	Chemicals
NST/R 9:	Machinery, transport equipment, manufactured articles and miscellaneous articles

Ø ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

The content of this “Statistics in Focus” is mainly based on data collected in the frame of the EU maritime Directive (“Council Directive 95/64/EC of 8.12.1995 on the statistical returns in respect of carriage of goods and passengers by sea” – OJ L320 of 30.12.1995, page 25).

Due to derogations granted to Member States from 1997 to 1999, data are not complete at EU level.

Table 1: Total quantity of goods loaded and unloaded in Member States (in 1000 tonnes)

Considering the remark made in the previous paragraph, figures were taken from the REGIO database, offering a more complete time series. However, figures include cargo loaded and unloaded in small ports, for which reporting is not compulsory in the frame of the Directive. In general, volumes are thus slightly higher than those reported according to the Directive.

Figure 1: Share of types of cargo handled (inward and outward) by selected Member States in 1997

In the interest of clarity, certain cargo types have been regrouped. This is notably the case for the category “ro ro mobile units”, composed of “ro-ro mobile self propelled units” and “other ro- ro mobile units”.

Greece specified only three categories: liquid bulk, dry bulk and ‘unknown’. In this case, ‘Unknown’ has entirely been attributed to the category ‘Other goods’. Germany and Italy did not supply a breakdown by type of cargo.

Figure 2: Outward traffic: share of main destinations for selected Member States

Indications of Figure 2 are based on the percentual share of the total volume (declared in tonnes) by destination.

The ‘world regions’ used in this Figure (‘Rest of Europe’ and ‘Rest of the world’) have been used according to the geonomenclature used by all units of

Eurostat (OJ L307 of 02.12.1999, page 46 – Commission Regulation (EC) 2543/99 on the nomenclature of countries and territories for the external trade statistics of the Community and statistics of trade between Member States).

The various figures represented on the map include traffic to the Canary Islands (Spain) and the Azores and Madeira (Portugal). However, these territories do not appear on the map.

Table 2: Traffic by type of vessel for selected Member States 1997 – number of outward movements

Certain reporting countries may declare more types of vessels (like tugs, fishing boats or ‘miscellaneous’), however, only reporting on the movements of vessel types listed in table 2 is compulsory.

Figure 3: Value of goods forwarded from and to the EU in 1997 : share of Member States - in %

The source for this figure is Eurostat’s Foreign Trade (Comext) database. Data used for this figure are based on the total value of goods of goods entering and leaving the EU through the maritime transport mode. Intra-EU trade using the maritime transport mode is excluded.

Figure 4: Value of EU-15 imports and exports in 1997 : share by NST/R chapter – in %

As for Figure 3, the source for these figures is Eurostat’s Foreign Trade (Comext) database.

The goods classification is based on the Standard Goods Nomenclature for Transport Statistics/Revised (NST/R). In the interest of clarity, certain NST/R chapters have been grouped. NST/R chapter nine has been detailed but the individual groups were re-composed.

This publication was prepared with the assistance of Jelle Bosch, Artemis Information Management.

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