

Inland Waterways Freight Transport in 1990-2002 in the European Union and the candidate countries

Statistics
in focus

TRANSPORT

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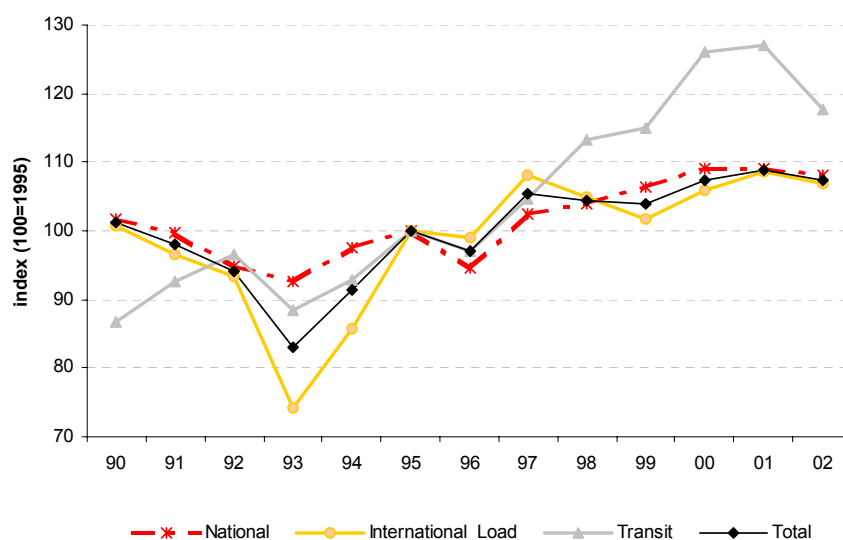


Figure 1: Evolution of goods transport (base 100 = 1995) based on tonnes transported

Highlights

Freight transport by inland waterways accounts for 7 % of total inland transport while inland transport by road, rail and pipelines represent respectively 75 %, 13 % and 5 %.

In 2002, the total volume of this mode of transport in the European Union was 445 million tonnes. National and international transport accounted respectively for 48 % and 52 % (based on national and international – load transport).

Germany and the Netherlands are the two main contributors to this activity. In 2002, they accounted for nearly 74 % of goods carried in Europe (based on national and international – load transport).

At national level, crude and manufactured minerals and building material account for almost half of the commodities carried by inland waterways transport. Self-propelled barges carry 79 % of commodities.

54 % of goods were transported over distances from 150 to 499km. 45 % of these distances were covered on German and Dutch territory.

The four new countries (Czech Republic, Hungary, Poland and Slovakia) increase inland waterways goods transport by 8 % (in 2000).



Inland Waterways freight transport by type of transport

Inland waterways freight transport plays a key role in the economic competitiveness of the European Union. It is therefore essential to be aware of its characteristics. Under Council Directive 80/1119/EEC, six Member States - Austria, Belgium, France, Germany, Luxembourg and the Netherlands - are required to report statistics on inland waterways freight transport. Since May 2004, four new countries (Czech Republic, Hungary, Poland and Slovakia) joined the European Union. For data availability reason, these countries are still presented in a separate chapter of this publication.

The figures recorded for Germany and the Netherlands reflect the key role of the Rhine axis for inland waterways freight transport. These two countries account for nearly three-quarters of the goods carried by this mode in Europe. 26 % are attributable to France and Belgium. Luxembourg and Austria carry relatively few goods in this way. They are responsible for only 3 % of the goods carried by inland waterways.

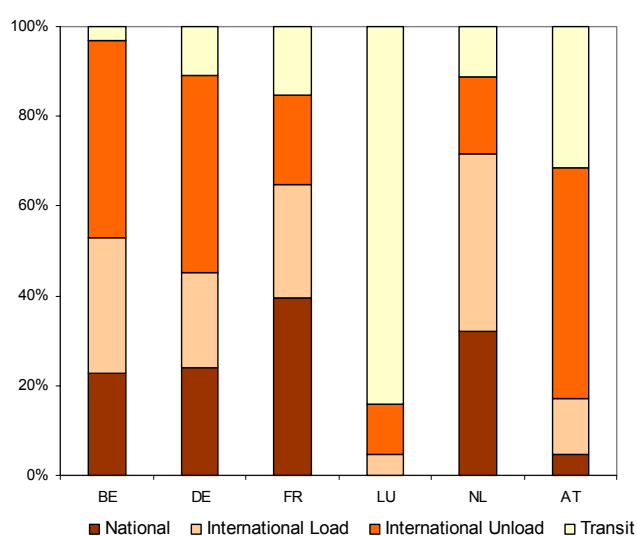


Figure 2: Split by transport type of total goods based on 1000 tonnes transported in 2002

	1990	1995	1996	1997	1998	1999	2000	2001	2002	Growth Rate (%)	
	in 1000 tonnes									(1990-2002)	(1995-2002)
BE	99 438	105 924	106 764	106 147	106 169	109 515	120 132	127 870	134 463	35.2	26.9
DE	231 574	237 884	227 019	233 455	236 365	229 136	242 223	236 101	231 746	0.1	-2.6
FR	66 086	55 055	46 688	58 131	62 010	65 508	70 669	68 408	67 092	1.5	21.9
LU	11 551	10 484	9 704	10 258	10 631	10 766	11 514	11 061	8 568	-25.8	-18.3
NL	286 147	286 070	289 332	318 817	316 063	311 267	313 708	328 913	311 507	8.9	8.9
AT	:	8 790	9 303	9 204	10 236	9 987	10 980	11 634	12 316	:	40.1
	in Mio tkm									Growth Rate (%)	
BE	5 389	5 731	5 715	5 829	6 015	6 362	7 215	7 655	8 073	49.8	40.9
DE	54 803	63 982	61 291	62 153	64 267	62 692	66 465	64 818	64 166	17.1	0.3
FR	7 581	6 630	6 027	7 058	7 936	8 478	9 110	8 294	8 269	9.1	24.7
LU	362	338	321	356	369	351	378	371	281	-22.4	-16.9
NL	35 661	35 457	35 513	40 986	40 683	41 428	41 271	41 793	40 804	14.4	15.1
AT	:	2 046	2 101	2 087	2 280	2 231	2 444	2 557	2 846	:	39.1

Table 1: Evolution by Member State of total goods transport including national, international load, international unload and transit

Three kinds of transport can be considered: national, international and transit transport. At European level, national and international represent respectively 48 % and 52 % of total transport by inland waterways (based on national and international-load transport, with the transit transport included in international transport). However, this assessment hides important disparities between the six Member States. Looking at figure 2, it appears that in Luxembourg, no commodity is transported at national level by this mode. Given its size, this fact is not surprising. On the other hand, in France, the Netherlands, Germany and Belgium, a significant share of inland waterways freight transport is at national level (40 %, 32 %, 24 % and 23 % respectively for each of these Member States). For Austria this percentage equals 5 %. In Austria, Belgium and Germany, this mode of transport plays essentially a key role for importation with almost half of the

total transport.

In the Netherlands, 40 % of this mode of transport is dedicated to exports. For transit transport, it is in Luxembourg that this activity has the greatest proportion, accounting for 84 % of inland waterways transport.

Table 1 provides information on the evolution of the quantity transported since 1990. Making estimations of missing data, it appears that from 1995 to 2002, a global rise of approximately 9 % has been observed for total freight transport. Several explanations for the greater use of this mode of transport in Europe during these last few years can be outlined. The complete liberalisation of the EU market since January 2000 as well as the modernisation and the restructuration of the fleet contribute to the growth of the inland waterways transport mode.

Even if global growth is observed, this hides disparities between countries. Table 1 points out that in the two countries, which carry the highest quantity of goods by inland waterways, the Netherlands and Germany, the quantity in tonnes of goods transported has not shown the same changes over the last ten years. The quantity increased more rapidly in the Netherlands than in Germany. The 1990-2002 and 1995-2002 growth rates are both close to 9 % in the Netherlands while these two rates are less than 3 % in Germany.

Moreover, from 1990 to 2002 Germany was the only country where the quantity of transported goods remained constant. In France, since 1996, freight transport by inland waterways has continued to increase. This rise is not only true in term of quantity carried but also in term of distance covered. Since 1995, the quantity in tonne of goods increased by more than a quarter of its initial value. This increase is even more noticeable when one observes the evolution in tonne-kilometres.

Unloading country \ Loading country	Loading country						TOTAL
	BE	DE	FR	LU	NL	AT	
BE		14143	3242	28	41360	51	58 824
DE	12245		6012	284	77648	509	96 698
FR	4746	2297		8	6047	22	13 119
LU	177	488	62		164	-	891
NL	21090	26506	4495	114		217	52 423
AT	53	466	-	-	1327		1 847
TOTAL	38 311	43 899	13 810	434	126 547	800	223 802

Table 2: Intra-EU goods transport declared by relation in 2002 (1000 Tonnes)

Concerning more specifically international freight transport, it is interesting to consider which are the main countries exchanging commodities. The quantity of goods exchanged between countries depends on cultural, economical and political aspects but also on the structure of the trans-European network.

Table 2 provides indications on the quantity of goods exchanged in 2002 between the six Member States. The declaring Member State is the unloading country.

It emerges that 86 % of international transport by inland waterways is carried out between the Netherlands, Germany and Belgium. More precisely, 47 % concerns exchanges between the Netherlands and Germany. Exports from the Netherlands to Germany represent 35 %. Approximately one quarter of international exchanges are exchanges between the

Netherlands and Belgium.

It is interesting to note that Germany is the European country which imports the biggest quantity in this way (97 million tonnes of goods). Its principal partners are the Netherlands and Belgium. Germany exchanges with these two countries 130 million tonnes of goods that is to say 93 % of its total for international transport. For exports, Germany is a main destination for all the Member states. Its share is 64 % for Austria, 61 % for the Netherlands, 44 % for France and 32 % for Belgium. The Netherlands is by far the country which exports the most important quantity of goods.

It may be noted that the Netherlands compared to France and Germany is a country of small size. Nevertheless, it accounts for 40 % of commodities carried by inland waterways transport (based on year 2002).

Type of goods transported by inland waterways

Analysing the breakdown by group of goods brings also interesting information. Tables 3, 4 and 5 analyse groups of goods carried for each Member State respectively for national, international and transit transport. Table 3 shows that at national level, crude and manufactured minerals and building material (chapter 6) account for almost half of the commodities carried. 19 % are attributable to petroleum products (chapter 3). The breakdown by type of goods carried is similar for all years. At international level (table 4), the most carried products are also crude and manufactured minerals and building material. Yet, this is less notable since these products account for only one fifth of the commodities carried. Concerning petroleum products, they account for almost 15 %

of goods carried. As for national transport, the breakdown was approximately the same for all years. The main difference between national and international transport lies in the higher level of ores and metal waste transported (chapter 4) at international level (at national level, this kind of commodity accounts for just 3 % of the total transport).

Tables 3, 4 and 5 also outlines differences between Member States. At national level, it is noticeable that Austria is distinguishable from the other European countries by mainly carrying petroleum products (chapter 3), metal product (chapter 5) and crude and manufactured minerals, building material (chapter 6). These commodities account for 98 % of goods transported.

However, the quantity of products carried in thousands of tonnes in Austria remains very low compared to the other countries.

At national level, the breakdown by chapter is quite similar in Belgium and Germany. In Belgium and Germany, almost a third of commodities transported are crude and manufactured minerals and building materials (chapter 6). In France and in the Netherlands, the transport of these goods is much more predominant since they account for around 62 % (FR) and 52 % (NL) of the commodities transported. On the other hand, chemicals, petroleum products and solid mineral fuels (respectively chapter 8, 3 and 2) account for a more important share of products transported in Belgium and Germany.

NST/R Chapters											
National	0	1	2	3	4	5	6	7	8	9	TOTAL (%)
BE	634	1 391	4 521	5 533	1 715	1 102	10 180	946	2 271	2 141	14.3
DE	1 867	3 432	7 491	14 038	3 246	1 416	17 234	1 015	4 962	1 144	26.2
FR	2 332	552	1 553	3 358	93	411	16 517	107	790	815	12.5
LU	-	-	-	-	-	-	-	-	-	-	-
NL	2 733	8 661	2 173	17 106	1 543	876	52 314	1 551	5 385	7 338	46.8
AT	4	1	0	229	0	164	156	6	0	0	0.3
TOTAL (%)	3.6	6.6	7.4	18.9	3.1	1.9	45.2	1.7	6.3	5.4	100

Table 3: National transport of goods (in 1000 Tonnes) by NST/R Chapter declared in 2002

NST/R Chapters												
International	0	1	2	3	4	5	6	7	8	9	TOTAL (%)	
Total	3 330	4 014	6 608	17 815	6 524	4 096	25 908	4 160	10 762	16 814	21.4	
BE	870	1 222	3 563	8 396	1 619	1 822	7 849	1 515	5 613	8 337	8.7	
Load	2 460	2 792	3 045	9 419	4 905	2 274	18 058	2 645	5 149	8 477	12.7	
Unload	5 203	10 134	20 394	20 432	30 933	9 303	26 904	4 906	12 709	10 005	32.3	
DE	3 143	3 326	746	2 539	2 456	5 644	17 302	2 027	5 520	6 380	10.5	
Load	2 060	6 808	19 648	17 893	28 477	3 659	9 602	2 879	7 189	3 625	21.8	
Unload	5 458	1 971	4 169	2 316	2 664	1 673	8 522	784	1 430	1 273	6.5	
FR	5 264	1 529	94	870	177	702	7 025	77	420	886	3.7	
Load	194	442	4 075	1 446	2 487	972	1 497	707	1 010	388	2.8	
Unload	0	0	40	280	326	94	533	80	0	0	0.3	
LU	0	0	0	4	10	90	304	2	0	0	0.1	
Load	0	0	40	276	316	4	228	78	0	0	0.2	
Unload	5 669	10 164	23 363	28 786	32 805	4 715	33 743	4 083	14 625	18 464	37.8	
NL	928	7 780	22 359	23 661	31 806	2 474	13 396	3 476	9 729	7 772	26.4	
Load	4 741	2 384	1 003	5 125	1 000	2 241	20 347	607	4 896	10 692	11.4	
Unload	673	450	106	1 861	3 200	271	471	752	41	41	1.7	
AT	205	76	0	388	2	169	160	514	22	19	0.3	
Load	469	374	106	1 473	3 198	101	311	239	19	23	1.4	
Unload	TOTAL (%)	4.4	5.7	11.7	15.3	16.4	4.3	20.6	3.2	8.5	10.0	100

Table 4: International transport of goods (in 1000 Tonnes) by NST/R Chapter declared in 2002

NST/R Chapters											
Transit	0	1	2	3	4	5	6	7	8	9	TOTAL (%)
BE	1 262	197	333	35	346	466	312	687	301	61	4.7
DE	3 152	2 244	3 795	5 211	2 094	1 913	3 275	583	392	2 323	29.1
FR	325	298	192	3 879	132	1 083	2 583	160	482	1 172	12.0
LU	1 406	573	2 606	28	1 138	647	474	133	42	168	8.4
NL	1 339	1 422	2 966	5 676	1 360	2 997	5 811	2 239	5 272	6 327	41.3
AT	659	1 439	46	283	73	767	109	252	57	204	4.5
TOTAL (%)	8.0	7.0	11.2	17.6	5.6	8.6	14.3	3.9	7.3	11.9	100

Table 5: Transit transport of goods (in 1000 Tonnes) by NST/R Chapter declared in 2002

Concerning the breakdown by chapter of products for international transport (table 4), it is less easy to profile countries. Member States transport the various kinds of product in different proportion. France has the highest share of agricultural products and live animals (chapter 0), accounting for 18 % of products transported. In Luxembourg, the transported goods are essentially crude and manufactured minerals and building materials (chapter 6) and ores and metal waste (chapter 4), accounting for almost two - thirds of the products transported.

Concerning the breakdown by chapter of products for transit trade (table 5), the share of agricultural products and live animals is much greater than is observed for national and international transport (chapter 0 accounts for 8 % of transit transport, 4 % of national transport and 4 % of international transport). France, Germany and the Netherlands carried in transit trade an important share of petroleum products (chapter 3) (respectively 38 %, 21 % and 16 %).

Type of vessels and covered distance

The number of vessels has noticeably fallen for several years, the result of the successive scrapping plans organised at Community level. The importance of each kind of vessel for inland waterways freight transport is given in table 6. It emerges that at European level, self-propelled barges are by far the most used boats for freight transport. In 2002, nearly

80 % of commodities were transported in this way. Pushed barges transported about 20 % of goods. The commodities transported by towed barge were marginal (0.6 %). However, here again, the situation is quite specific to each Member State. Luxembourg did not record the use of any towed barges.

Vessel type	BE	DE	FR	LU	NL	AT	TOTAL
Self propelled barge	106 278	184 421	52 898	10 268	261 821	5 655	621 342
Self propelled tanker	34 776	50 371	3 010	441	83 004	1 097	172 700
Other self propelled barge	71 502	134 050	49 888	9 827	178 817	4 558	448 642
Towed barge	237	651	81	-	1 249	2 298	4 517
Towed tanker	-	13	-	-	-	15	28
Other Towed barge	237	638	81	-	1 249	2 284	4 489
Pushed barge	27 928	46 675	14 113	1 017	63 838	4 360	157 932
Pushed tanker	2 360	1 998	1 981	-	5 357	1 269	12 965
Other pushed barge	25 568	44 677	12 131	1 017	58 481	3 091	144 966
Other goods carrying vessel	19	0	0	0	2	2	23
TOTAL	134 463	231 746	67 092	11 285	326 911	12 316	783 813

Table 6: Total transport by type of vessels (in 1000 tonnes) declared in 2002

In the other Member States, the share of self-propelled tanker varies widely. In France, this kind of vessel represents a marginal share, less than 5 %, whereas in the other countries the share relatively to all the self-propelled barges is at least 20 % (except for Austria and Luxembourg). Towed barges are used most in Austria.

The breakdown by distances covered provides relevant information on the use of inland waterways for freight transport. Four groups of distances have been identified: less than 50km, between 50 and 150 km, between 150 and 500 km and finally distances superior or equal to 500km (see figure 3). It appears that for inland waterways national transport in tonne-kilometres, 54 % of goods were transported over distances from 150 to 499km.

National freight transport over distances more than 500km is mainly on German territory. The infrastructure and size of each country largely affects the data. But, other explanations can also be outlined like customs or political aspects.

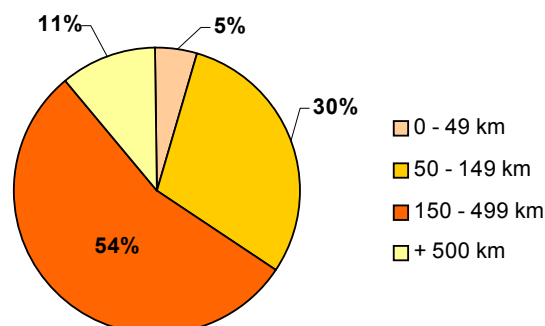


Figure 3: National transport by distance class based on transported Mio tkm in 2002

Inland waterways goods transport within the East Europe

On 1 May 2004, 10 countries joined the EU. This added 4 new Member States to those currently reporting under Directive 80/1119/EEC: Hungary, Poland, the Czech Republic and Slovakia. As candidate countries, Bulgaria and Romania also report according to the Directive. Nevertheless, the figures presented in the following table (Table 7) were supplied either on a voluntary basis according to the Directive, or extracted from national

publications published by the national Statistical Institute or the Ministry of Transport. The main inland waterways connected with third countries networks are Rhine-Main-Danube and Elbe-Oder-Danube. The Danube represents the second European river after the Volga uniting Western Europe to Oriental Europe up to the Black Sea. It brings the European network up to 2 850km.

The inclusion of these countries increases inland waterways goods transport by 8 % in 2000 (about 36 million tonnes). Romania and Poland realised more than 60 % of the transport of the Eastern countries. Bulgaria and Hungary come next with respectively 18.0 % and 12.0 %, the Czech Republic and Slovakia realising only 4.8 % and 3.3 %. The use of waterways is very different from one country to another. They are used for the national transport of goods in the Czech Republic and in Poland while Hungary and Bulgaria use them for international transport.

More precisely, in the Czech Republic, the waterways were used for exports between 1997 and 1999 (on average 44 % of the total transport). On the other hand, from 2000, national transport prevails and reached 43 % of the total transport in 2003. In Poland, more than half of transported goods were national and 40 % exports (based on the year 2000). Imports and goods in transit represent 5.5 % and 4.2 % of the total transport. In 2001, exports of Hungary and imports of Bulgaria each represented more than 50% of exchanges.

	Total	National	International				Transit
			load	unload	of which EU 15		
					load	unload	
CZECH REPUBLIC							
1997	1 753	429	836	488	836	488	-
1998	1 701	396	722	583	719	582	-
1999	1 715	419	721	575	721	575	-
2000	1 738	635	621	482	621	482	-
2001	1 747	750	515	481	515	481	-
2002	1 562	760	418	384	418	384	-
2003	1 172	558	375	240	375	240	-
HUNGARY							
2000	4 415	53	2 841	977	2 697	868	544
2001	5 897	37	3 106	1 288	2 254	1 021	1 466
2002	7 093	68	3 099	1 654	2 372	1 247	2 272
2003	6 137	42	2 153	1 674	1 650	1 043	2 268
POLAND¹							
1997	9 324	6 047	2 579	308	:	:	390
1998	9 285	6 046	2 220	416	:	:	603
1999	8 150	5 282	2 457	277	:	:	134
2000	9 943	5 025	3 946	551	:	:	421
SLOVAKIA²							
1997	819	0	765	54	:	:	:
1998	791	0	735	56	:	:	:
1999	1 146	0	1 095	51	:	:	:
2000	1 205	0	1 139	66	:	:	:
2001	1 223	0	1 138	85	:	:	:
2002	1 093	0	1 070	23	:	:	:
BULGARIA³							
2001	6 411	512	1 828	4 071	127	35	:
2002	6 395	539	1 877	3 980	204	87	:
2003	7 269	773	2 301	4 196	143	89	:
ROMANIA⁴							
1997	16 000	:	:	:	:	:	:
1998	15 000	:	:	:	:	:	:
1999	14 000	:	:	:	:	:	:
2000	13 000	:	:	:	:	:	:

1: source: "Inland Waterway in Poland in 1996-2000", Warszawa-Wroclaw 2001, Central statistical Office, Statistical Office in Wroclaw.

2: source: "Yearbook of Transport, Posts and Telecommunications in 2003", Statistichy Urad slovenskejrepubliky.

3: data for vessels used for ferrying purposes and dredgers have been included.

4: source: "Romania in figures in 2001", National Institute of Statistics.

Table 7: Evolution of total goods transport by kind of transport (in 1000 Tonnes)

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

This is the third Statistics in Focus on inland waterways freight transport in the European Union. The figures presented in this publication have been extracted from the Eurostat inland transport database. It includes the statistics of the national, international and transit transport of the Member States, collected under Council Directive 80/1119/EEC. Data are reported by 6 Member States of the European Union: Belgium, Germany, France, Luxembourg, the Netherlands, and Austria. According to Article 2 of the Directive, Member States in which the total volume of goods transported annually by inland waterways as international or transit transport does not exceed one million tonnes shall not be obliged to supply the statistics required under the terms of this Directive.

Concerning figures of the four new European countries and two candidate countries, they have been provided either by the candidate countries themselves in the sense of the Directive or extracted from national publications of their statistical Office or Ministry of Transport.

Data availability

By recent improvements in data availability and data quality, all data for 1990 to 2002 are available except for the new countries (Czech Republic, Hungary, Poland, Slovakia). Moreover, figures being not disseminated in New Cronos, the good transport analysis for these countries is presented in separated chapter. Next year, the publication should include the EU Inland Waterways good transport of the new Member states which covered the rules of the Directive.

Definitions of various kinds of inland waterways transport

Total goods transport at European level in tonnes: It includes transport declared by each Member state as national and international load. In other words, it doesn't take into account international unload because of double counting at European level. Total goods transport in tkm are reported on national territory and therefore include national, international and transit transport.

National inland waterways transport: inland waterways transport between two places (a place of loading and a place of unloading) located in the same country irrespective of the country in which the inland waterways transport vessel is registered.

International inland waterways transport: inland waterways transport between two places (a place of loading and a place of unloading) located in two different countries.

Inland waterways transit: inland waterways transport through a country between two places (a place of loading and a place of unloading) both located in another country or in

other countries provided the total journey within the country is by an inland waterways transport vessel and that there is no transshipment in that country.

Self-propelled barge: inland waterways transport freight vessel having its own means of mechanical propulsion.

Self-propelled tanker barge: self-propelled barge intended for the bulk transport of liquids or gases.

Towed barge: inland waterways transport freight vessel designed to be towed which does not have its own means of mechanical propulsion.

Towed tanker barge: towed barge for the bulk transport of liquids or gases.

Pushed barge: inland waterways transport freight vessel which is designed to be pushed and does not have its own means of mechanical propulsion.

Pushed tanker barge: pushed barge for the bulk transport of liquids or gases.

Breakdown by goods groups

The NST/R classification (Standard Goods Nomenclature for Transport Statistics / revised) consists of 24 goods groups. Because of the lack of space, it is not possible to present all 24 groups separately. The individual goods groups have thus been aggregated at NST/R chapter level. A brief description of the NST/R chapters is given in the relevant section of the commentary to enhance readability.

NST/R chapters

- | | |
|----|---|
| 0: | Agricultural products and live animals |
| 1: | Foodstuffs and animal fodder |
| 2: | Solid mineral fuels |
| 3: | Petroleum products |
| 4: | Ores and metal waste |
| 5: | Metal products |
| 6: | Crude and manufactured minerals, building material |
| 7: | Fertilizers |
| 8: | Chemicals |
| 9: | Machinery, transport equipment, manufactured articles and miscellaneous articles. |

This publication was prepared with the assistance of Mrs Sandrine Cipponeri and Emmanuelle Berthe, Ariane II.

Further information:

➤ Databases

NewCronos, Theme 7, Domain: inlandww

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