



Donaukommission – Commission du Danube – Дунайская Комиссия – Danube Commission

Austria Bulgaria Croatia Germany Hungary Moldova Romania Russia Serbia Slovakia Ukraine



Hungarian Cargo Magazine - Cargo on the Danube International Online Conference „Status and trends in Danube traffic“

Manfred Seitz
Budapest, 19 May 2021



Course of the presentation

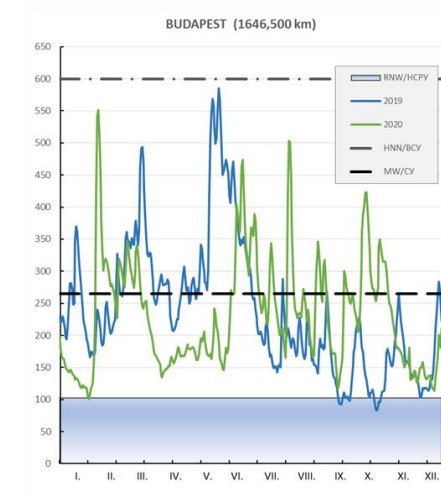
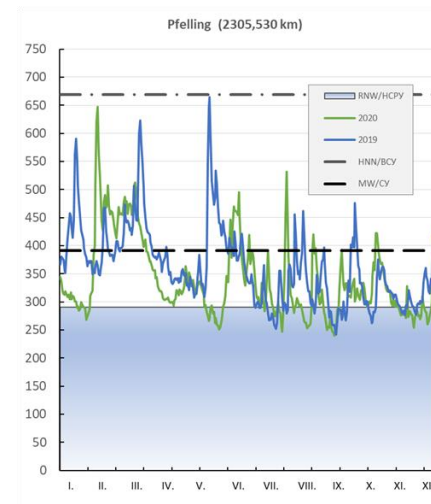
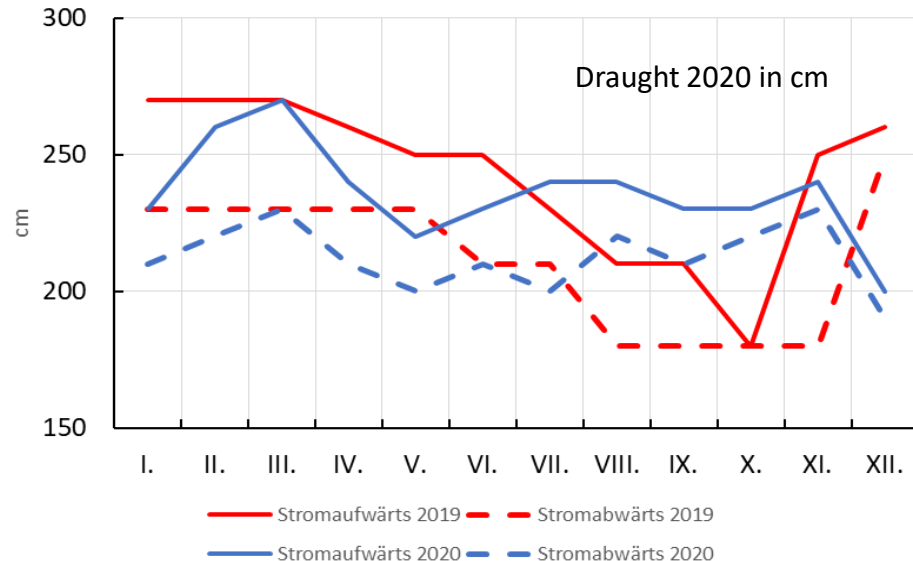
1. Overview of cargo transport on the Danube in 2020
 - Hydrological and economic framework conditions
 - Transport volumes overview
 - Transshipment volumes in Danube Ports
 - Freight rates and bunker fuel prices
2. Trends in Q1/2021 and overall outlook
3. References to publications of Danube Commission



Hydrological and economic framework conditions

Comparably good nautical conditions throughout the year

- Good discharge in first half of 2020 allowed vessel draughts up to 2.5 m in Q1, with maximum of 2.7 m in March; in April, May, July, September close to or at LWRL on Upper and Lower Danube; rainfall in June postponed summer low water period compared to 2019 and allowed most of the time 2.3 to 2.4 m, in November-December decrease in water levels along the entire Danube resulting into 2.0 to 2.1 m.
- No ice conditions, no major floods (3,5 days on Upper and Middle Danube in August)
- Fairway maintenance work (dredging) performed on critical sections





Economic framework conditions

Initial positive economic outlook for core markets (metallurgical, chemical, agricultural industry) effected by COVID-19 pandemic from mid-March despite some recovery in third quarter.

- Decline in raw materials for metal processing industry and for metal products in automotive industry, in construction sector and in manufacturing of industrial equipment; in addition, reduction of metal import quotas into the EU and new customs duties, no stabilization in this market segment until the end of 2020.
- Large volumes of grain and other agricultural products transported from ports on the Middle Danube to ports on Lower Danube (especially Constanța) made it possible to maintain a certain balance of freight transport on the Danube in 2020.
- Petroleum products and products of the chemical industry were (surprisingly) relatively stable during the year.






COVID-19 Activities of the Danube Commission

• Inform - Intervene - Communicate

- ✓ Provision of daily updated information on COVID-19 measures
<https://www.danubecommission.org/dc/en/2020/05/20/information-regarding-the-status-of-all-national-covid-19-restrictions-for-danube/>
- ✓ Addressing barriers, contradictions, open questions in legislation; Cases: Maritime Danube ports, quarantine, crew change
- ✓ Coordination with EC/DG MOVE, Guidelines, Recommendations, Regulations

• Further proposals forwarded to the Member States

- Extension of the validity of the service documents of the crew [shipmaster's certificates, certificates of competency, medical certificates, service books]
- Ensuring the replaceability of crew members
- recognition of the extension (validity) of ship certificates
- Extension of the validity of certificates of special knowledge of ADN
- Extension of the validity of Certificates of Approval and Provisional Certificates of Approval for carriage within the territories of the ADN Contracting Parties
- Crew change in a foreign port
- Bunkering of fuel, water and food, Urgent repair of ships
- Lock operation, RIS operation
- Electricity supervision and formalities of entry into / exit from ports/ Completion of entry and exit formalities at border crossing points around the clock
- Personal protection measures for ship's crews, etc.

Aktuelle Informationen der DONAUKOMMISSION über Maßnahmen der Donaustaaten im Zusammenhang mit COVID-19, welche Auswirkungen auf die Donauschifffahrt haben Актуализированная информация ДУНАЙСКОЙ КОМИССИИ о мерах приданайских государств в связи с COVID-19, которые оказывают воздействие на дунайское судоходство Information actualisée de la COMMISSION DU DANUBE relative aux mesures des Etats danubiens en connexion avec COVID-19, ayant un impact sur la navigation danubienne			
Donaustaat Приданауиско государство Etat danubien	Link zur vollständigen Meldung auf der Website der DK / Kurzmitteilung über aktuelle Beschränkungen / Sonstige Informationen Ссылка на полный текст Извещения на веб-сайте ДК / краткое сообщение о текущих ограничениях / прочая информация Le lien menant au texte complet de l'Avis se trouve sur le site Internet de la CD / brève communication au sujet des restrictions en cours / autres informations		Dauer der Beschränkung Сроки действия ограничения Durée de la restriction
	in der Fahrgastschifffahrt перевозки пассажиров transports de passagers	in der Güterschifffahrt перевозки грузов transports de marchandises	
 DE	<p><i>(Erlass des BMVI Nr. WS 25/6263.2/1 vom 17.03.2020)</i> https://www.bmvi.de/SharedDocs/DE/Artikel/G/befoerderung-gefahrlischer-querer-corona.html <i>Schiffahrtspolizeilicher Hinweis Nr. 38/2020</i></p> <p>Um die negativen Auswirkungen der COVID-19-Pandemie auf die Binnenschifffahrt so gering wie möglich zu halten, sind in einigen Fällen (siehe Link) besondere Maßnahmen zulässig in Bezug auf die Vertretung von fehlenden Besatzungsmitgliedern durch andere, die sich an Bord befinden, sowie die Verlängerung der Gültigkeit von Schiffszeugnissen zur Fahrttauglichkeit, sowie von Befähigungszeugnissen und Schifferdienstbüchern, ohne Prüfung.</p> <p>Gemäß Strompolizeilicher Anordnung 11/20 des Wasserstraßen- und Schifffahrtsamtes Donau MDK Nürnberg vom 30.03.2020 wird der Schleusenbetrieb von 22.00 Uhr bis 06.00 Uhr des Folgetages (Nachtschicht) an allen Schleusanlagen des Main-Donau-Kanals und der Donau ab dem 1. April 2020 für unbestimmte Zeit vorübergehend ausgesetzt.</p> <p><i>(Постановление БМВТ № WS 25/6263.2/1 от 17 марта 2020 г.)</i> https://www.bmvi.de/SharedDocs/DE/Artikel/G/befoerderung-gefahrlischer-querer-corona.html <i>Сообщение полиции судоходства № 38/2020</i></p> <p>Чтобы удерживать негативное воздействие пандемии COVID-19 на внутреннее судоходство на минимально возможном уровне, в некоторых случаях (см. линк) допускаются специальные меры по замене недостающих членов экипажей из имеющихся на борту и продлению действительных судовых</p>		<p>vom 1. April 2020 bis auf Weiteres</p> <p>с 1 апреля 2020 года до дальнейшего уведомления</p>



DK

/VI-2020

DONAUKOMMISSION
ДУНАЙСКАЯ КОМИССИЯ
COMMISSION DU DANUBE

Budapest, Juni 2020
PS/Ge/Ha/Wo/Gi

Ständige Vertreter/in
bei der Donaukommission
und deren Stellvertreter/innen

Betreff: Besondere Vorschriften der zuständigen Behörden der Mitgliedstaaten der Donaukommission in Bezug auf Schifffahrtseinschränkungen auf der Donau infolge von Maßnahmen zur Bekämpfung der Ausbreitung des Coronavirus (COVID-19) – ÜBERBLICK UND VORSCHLÄGE

Bezug: DK 58/III-2020 vom 18. März 2020
DK 66/III-2020 vom 30. März 2020
DK 69/IV-2020 vom 1. April 2020
DK 70/IV-2020 vom 7. April 2020



Transport volumes overview

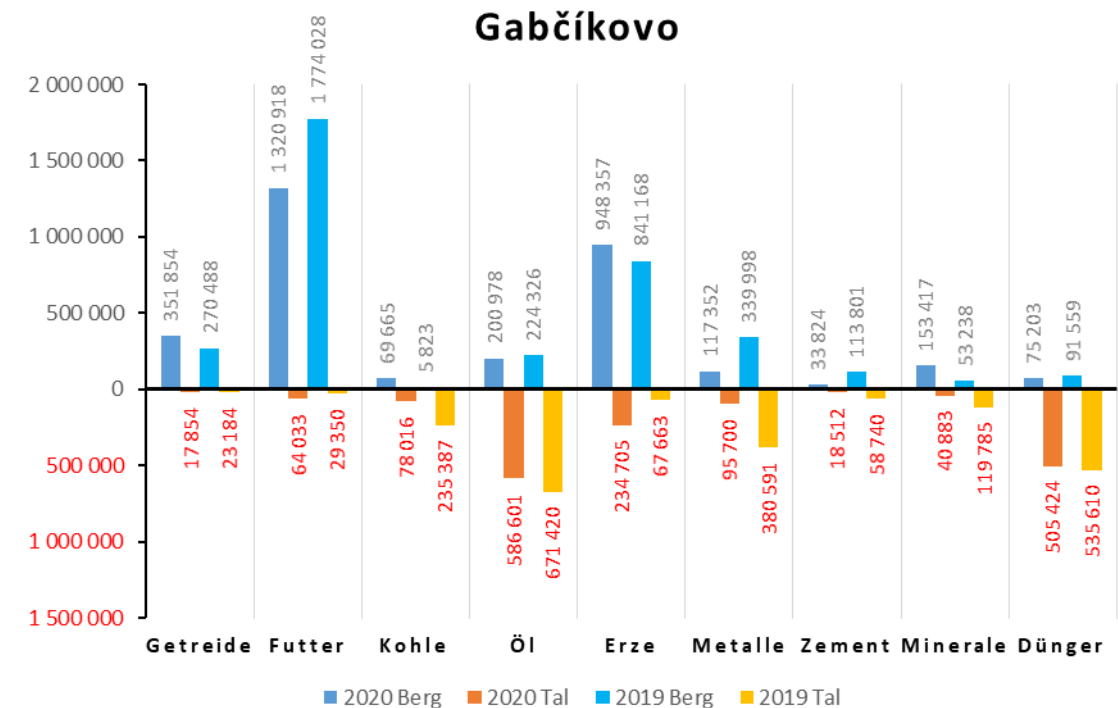
2020/in 1.000 tons	Q ₁	Q ₂	Q ₃	Q ₄	Total	Diff % 2019
Germany <--> Austria	801,8	822,4	342	365,5	2.332	-29,8
Hungary <--> Slovakia	1.389	1.342	1.197	1.083	5.011	-14,1
Hungary <--> Croatia/Serbia	1.509	1.575	1.564	1.465	6.113	+9,5
Danube Black Sea Canal	3.897	4.132	4.086	4.392	16.507	-1,4
Sulina Canal	-	-	-	-	4.549	-17,1

- Motor cargo vessels in cross-border traffic HU/SK corresponded to 50.8% of the goods transport and 106.8% of 2019.
- Volume transported by motor vessels on the Middle Danube exceeded by 30% the volume recorded in 2019.
- Decrease in transport demand in certain periods and decrease in vessel utilization: e.g. average loading of motor vessels of 110 m in cross-border traffic DE/AT in period May-June was 15% lower than in same period of 2019. This situation was also observed for transport with pushed convoys on other stretches of the Danube.



Cargo flows registered at Gabčíkovo

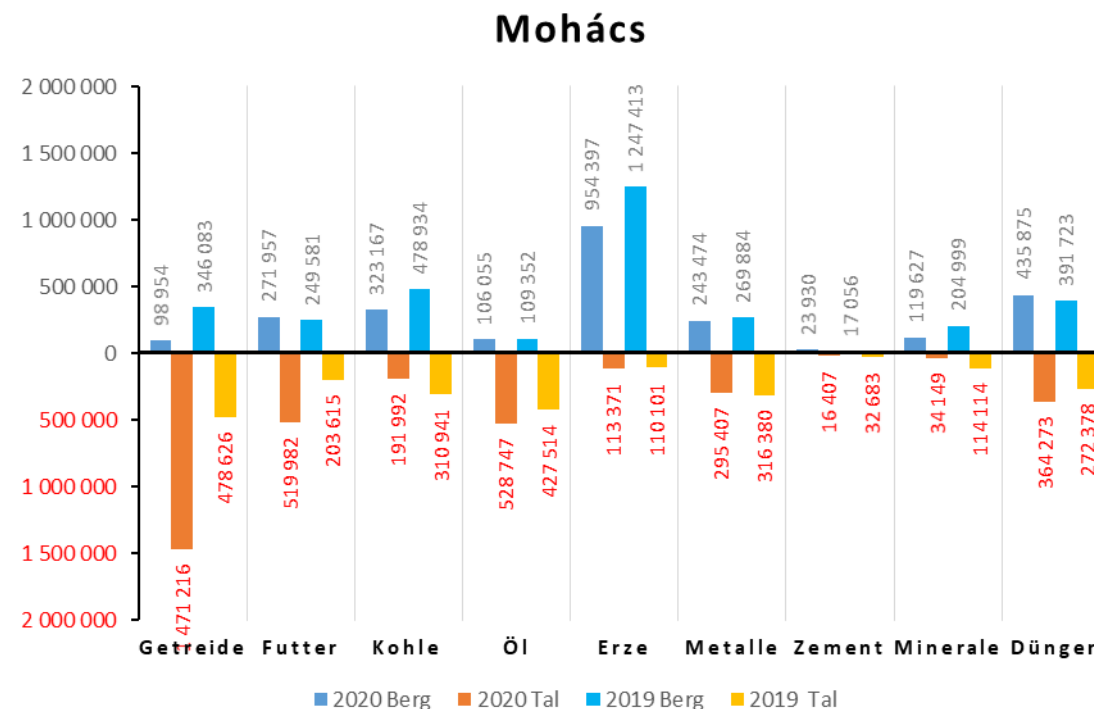
- Volume of goods transported through Gabčíkovo locks came to 5,011,000 t in 2020 (85.9 % of 2019)
- 4,225,000 t of dry goods (upstream 3,096,000 t and downstream 1,129,000)
- 786,000 tons of liquid cargo (206,000 tons upstream, 580,000 tons downstream)
- 3,299,000 t upstream transit traffic (65.8 % of total)
- 2,482,000 t with pushed convoys (49.2% of total and 71.5% of 2019)
- 2,529,000 tons with motor vessels (50.5% of total and 106.8% of 2019)
- 3,564 motor cargo vessels (276 loaded with length of 110 m and 76 with length of 135 m)





Cargo flows registered at Mohács

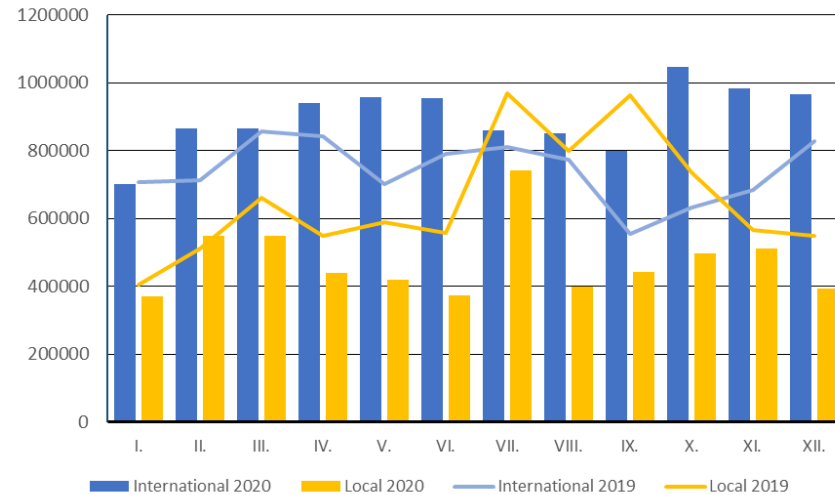
- Volume of goods transported through Mohács came to 6,113,000 t in 2020 (109,5 % of 2019)
- 5,478,000 t of dry goods (upstream 2,472,000 t and downstream 3,006,000)
- 635,000 tons of liquid cargo (106,000 tons upstream, 529,000 tons downstream)
- 2,577,000 t upstream transit traffic (42,28 % of total)
- 4,630,000 t with pushed convoys (75,7% of total, in 2019: 79.5%)
- 1,483,000 tons with motor vessels (24,2% of total)
- The largest share of the transport volume was accounted for grain, iron ores, metal products and chemical products
- 2020 brought a significant increase in export of grain, animal fodder, fertilizers and oil products and a significant decrease in import of grain, coal and iron ore





Cargo flows on the Lower Danube

Cernavodă-Constanța



Danube - Black Sea Canal

Year, in mio t	2013	2014	2015	2016	2017	2018	2019	2020
Total volumes	13,96	14,43	14,02	14,55	13,77	14,12	16,74	16,51
International	8,63	7,90	8,62	8,03	6,91	6,42	8,89	10,60
Domestic	5,33	6,53	5,40	6,52	6,86	7,7	7,85	5,91

Sulina-Canal

Year, in mio t	2014	2015	2016	2017	2018	2019	2020
Total volumes	3.668	3.848	3.764	4.307	4.441	5.487	4.549
Danube to Black Sea	3.245	3.263	3.250	3.606	3.670,3	4.331	2.872
Black Sea to Danube	423	585	514	701	770,3	1.156	1.677



Transshipment volumes in Danube Ports

The total cargo throughput of ports of DC Member States reached 64.9 million tons in 2020 (93.3% of the volume in 2019), changing in different ways compared to 2019, both by quarter and in the 2020 annual balance.



Ports in 1.000 tons	2019	2020	2020 in % zu 2019
Germany	3.274	3.511	107,2
Austria	6.452	6.645	103
Slovakia	1.664	1.553	93,3
Hungary	6.742	6.064	111
Croatia	814	948	116,4
Serbia	9.735	8.164	83,9
Bulgaria	5.385	5.431	100,9
Romania	28.474	27.307	95,9
Moldova	1.299	1.185	91,2
Ukraine	5.629	4.055	72



Freight rates and bunker fuel prices

- Freight rates for goods transport remained stable during the year
- Price of bunker fuel in 2020 decreased by 26.5% compared to the median price in 2019 (USD 726.2/t).

Index: Q ₄ 2019 = 100 %	Q ₁	Q ₂	Q ₃	Q ₄
Bunker fuel	88,8 (95,1)	71,3 (96,8)	66,5 (96,1)	67,9 (95,8)
Freight rates:	101,7 (97,3)	108,2 (96,1)	102,5 (97,4)	111,3 (100,2)
Upstream	90,1 (98,6)	93,1 (97,6)	90,8 (97,7)	91,9 (98,4)
Downstream	118,0 (95,5)	109,7 (93,2)	101,8 (94,5)	110,7 (99,1)



Trends in Q1/2021 and overall outlook

- The Danube market in the first (Q1) quarter of 2021 was shaped by the rather unstable 2020 comparison but showed slight positive developments for the main industrial and agricultural sectors.
- The lack of ice conditions during the winter period ensured uninterrupted navigation in the first quarter of 2021 and sufficient water depth allowed loading of cargo ships with a draught of 2.5m.
- The traffic volume recorded in Q1/2021 through the Gabčíkovo was 1,220,000 tons which is 87.8% of the volume of Q1/2020.
- The traffic volume in Q1/2021 through Mohač was 1,680,000 tons which is 111.3% of the traffic volume of Q1/2020.
- A feature of the Q1/2021 market is the increase in upstream transport of iron ore and a significant increase in downstream transport of grain.
- The traffic volume on the Danube-Black Sea Canal in Q1/2021 was 4,377,000 tons, or 112.3% compared to Q1/2020

A general recovery in the freight transport market in 2021 is expected due to the forecasted 4% growth in Eurozone GDP compared to 2020 (March 2021 forecast)



References to publications of Danube Commission

Market Observation:

Quarterly Reports and Yearly Reports in German, French and Russian

<https://www.danubecommission.org/dc/en/danube-navigation/market-observation-for-danube-navigation/>

In autumn 2021 to be published:

Statistical Yearbook of the Danube Commission, Editions 2018, 2019 and 2020

Statistical Yearbook 2014-2017 (published 2020)

https://www.danubecommission.org/uploads/doc/2020/stat_2014_2017/de_stat_2014_2017.pdf



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Austria Bulgaria Croatia Germany Hungary Moldova Romania Russia Serbia Slovakia Ukraine

**Thank you for
your attention!**

**Secretariat of the Danube
Commission**

manfred.seitz@danubecommission.org

H-1068 Budapest
Benczúr utca 25

www.danubecommission.org

