

# Market Trends for Danube Logistics

Simon Hartl

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- Transport development – the role of viadonau
- Existing potentials for Danube Logistics
- Results of the INWAPO market review analysis
  - High & Heavy cargo
  - Renewable resources and biomass
- Outlook on next steps

## Transport development – the role of viadonau

- **Interface and neutral platform** for business contacts in the area of Danube logistics and multimodality
- Support logistics professionals by providing **technical know-how** regarding the Danube waterway, nautics and logistics
- Provide information on **available funding schemes** regarding inland waterway transport and Danube logistics
- Collect **data and information** on the Danube logistics axis and disseminate them to relevant stakeholders



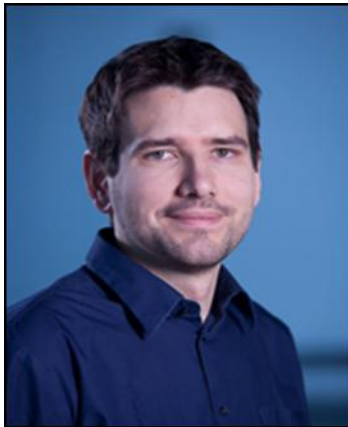
Source: viadonau

# Team Transport Development

Simon Hartl

Bettina Matzner

Milica Gvozdic



# Existing potentials for Danube Logistics

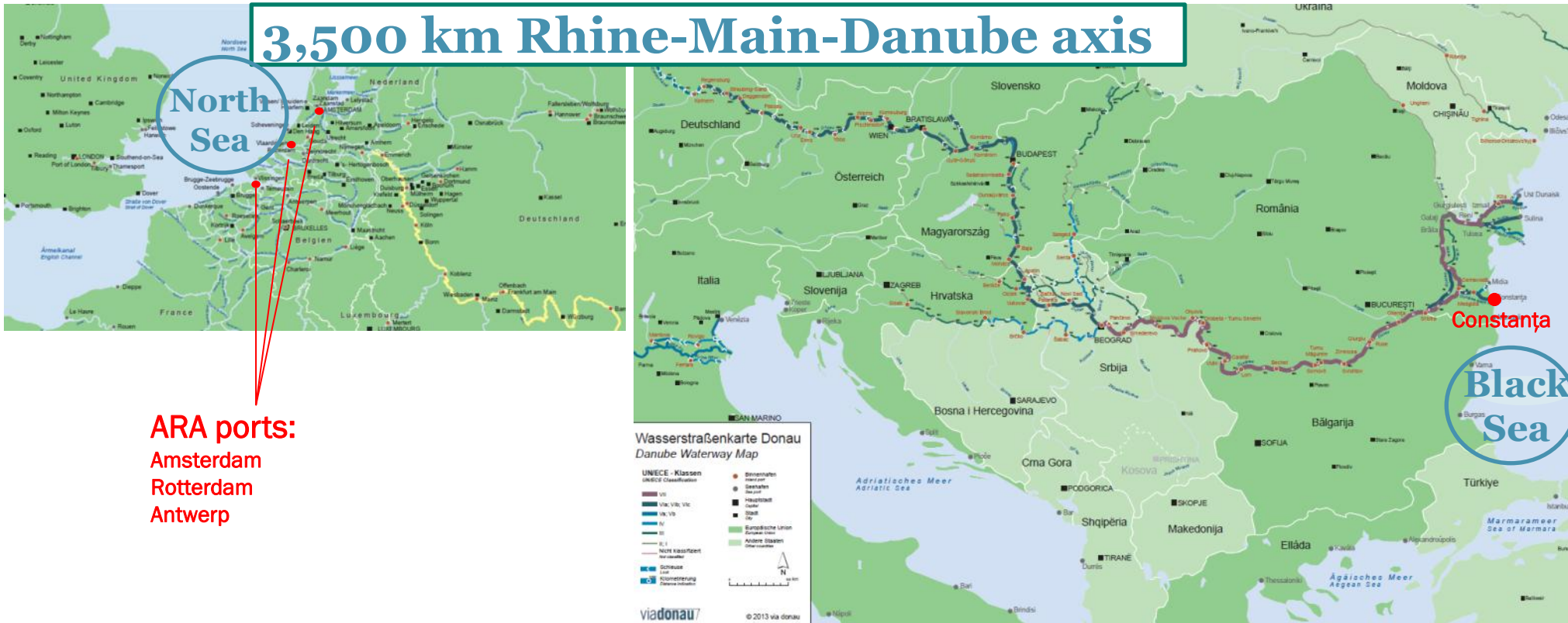
# Part of a bigger system and linked to the world

**3,500 km Rhine-Main-Danube axis**

North Sea

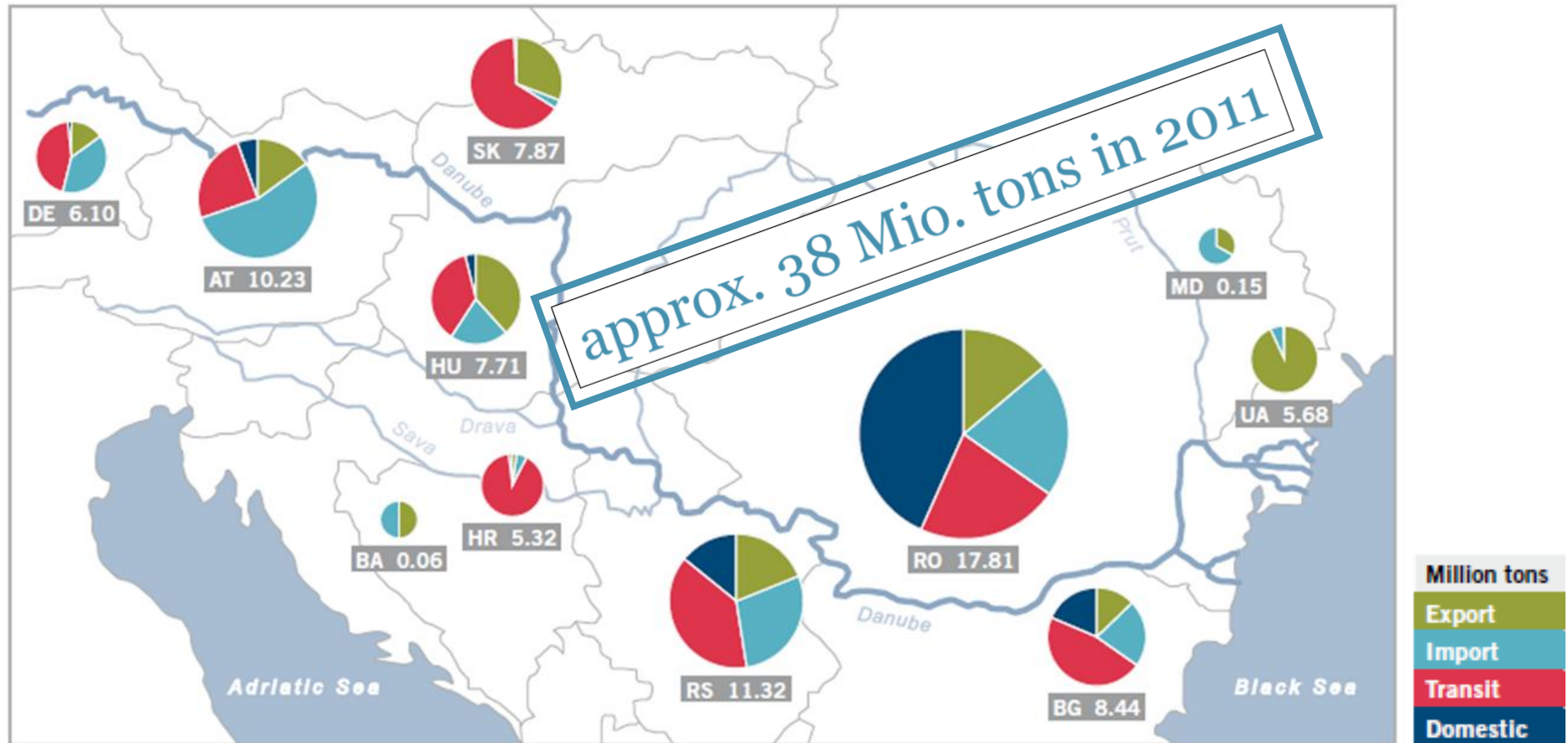
ARA ports:  
Amsterdam  
Rotterdam  
Antwerp

Black Sea



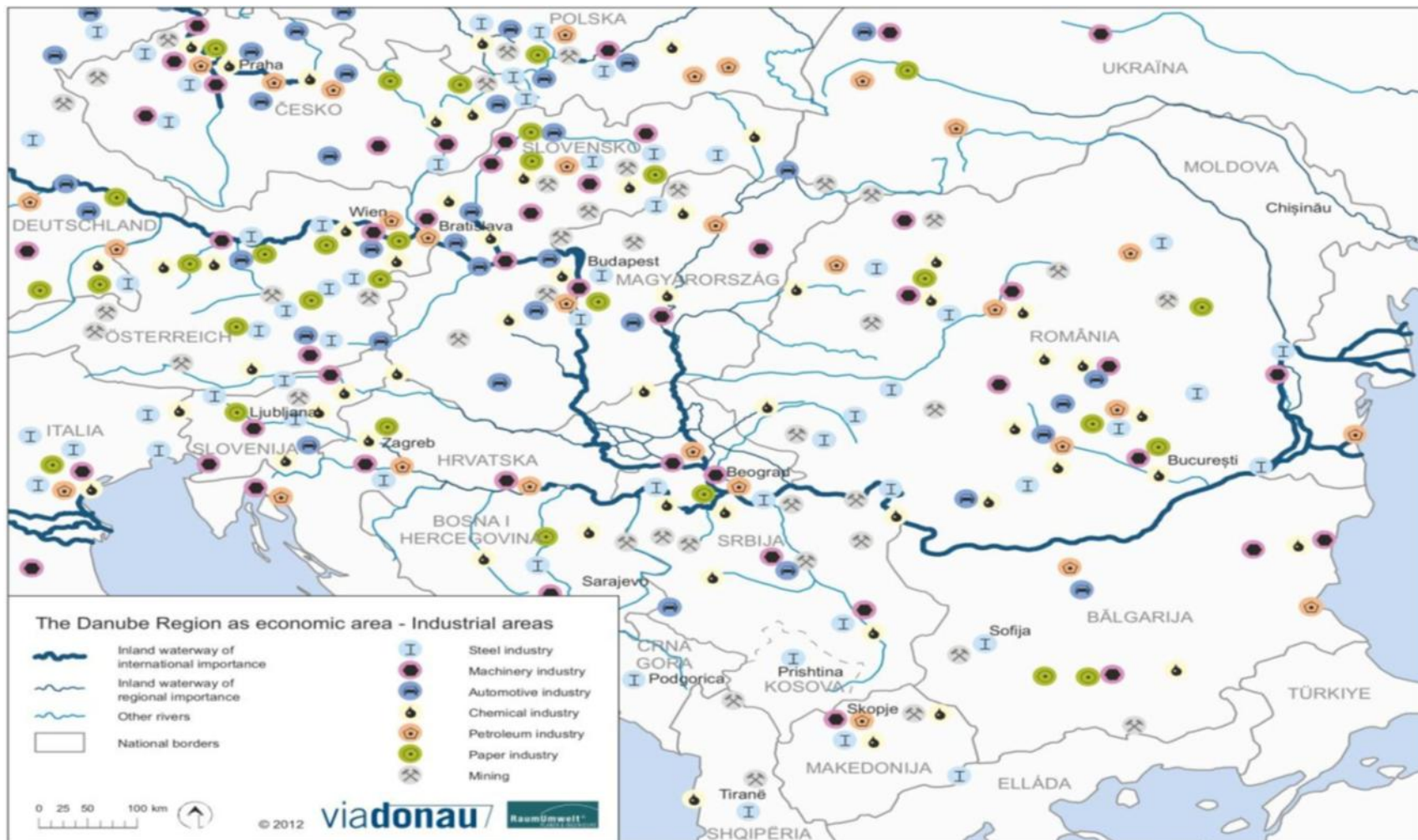
Source: viadonau

# Freight transport on the Danube in 2011



Source: Danube Navigation in Austria, Annual Report 2012, viadonau

# The Danube Region as an economic area – Industrial areas

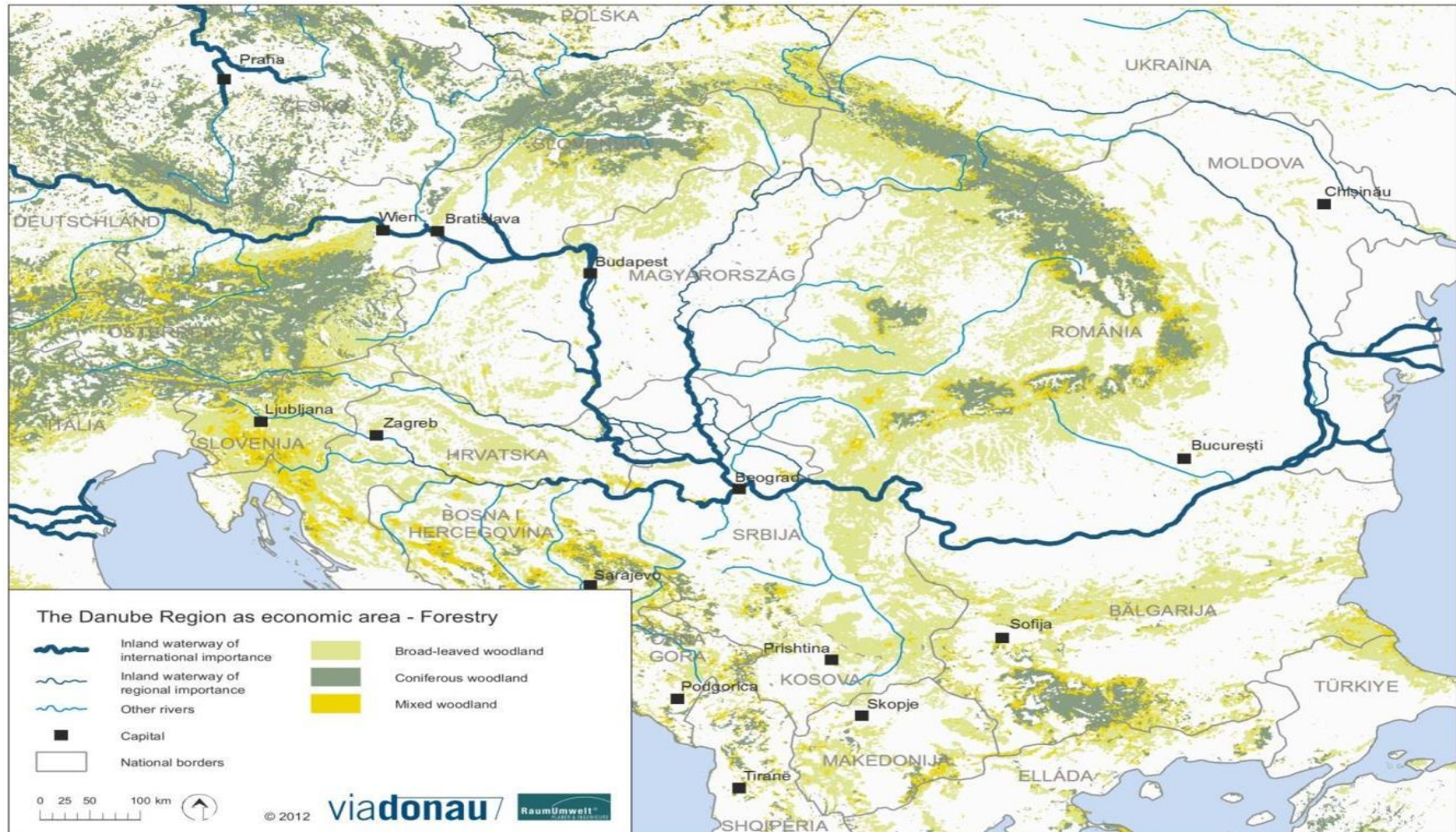




# The Danube Region as an economic area – Agricultural areas



# The Danube Region as an economic area – Forestry



viadonau

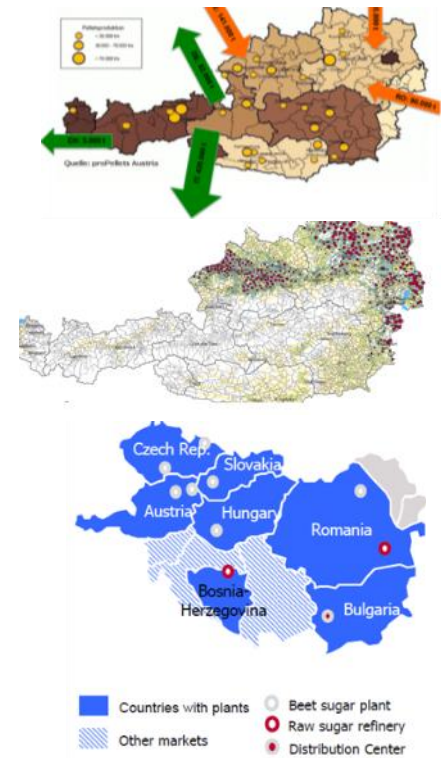


# Results of the INWAPO market review analysis



# Market review analysis – national level Austria

- Analysis of potentials for a **modal shift of nine selected types of cargo**
- Analysis of **status quo** (origin & destination of current transports, e.g. growing areas, raw material markets)
- **Geographical evaluation of locations for industry and trade** located in the vicinity of the Rhine-Danube axis
- **Identification of relevant transport volumes and relations** to/from/within Austria
- **Sector-specific good practices** for the use of inland navigation



Source: proPellets Austria, Statistik Austria, Agrana and viadonau

# Market review analysis – national level Austria

## Results ➡ Types of cargo

- Automotive components and cars
- Chemical products
- Waste and recycling products
- Construction material
- Empty containers
- Renewable resources
- High & Heavy cargo
- Machinery
- Paper and pulp



Source: viadonau

# I. High & Heavy cargo

# Advantages of inland navigation for High & Heavy transports

- **Large loading capacities** compared to road and rail transport (size and weight less critical)
- **Less transport restrictions** compared to road (e.g. weekend bans)
- **No transit permissions** needed for oversized cargo
- **Less problems in passing bridges, tunnels and other obstacles**; no need to remove traffic lights or signs



Source: viadonau

# High & Heavy Ports (Lift-on Lift-off)

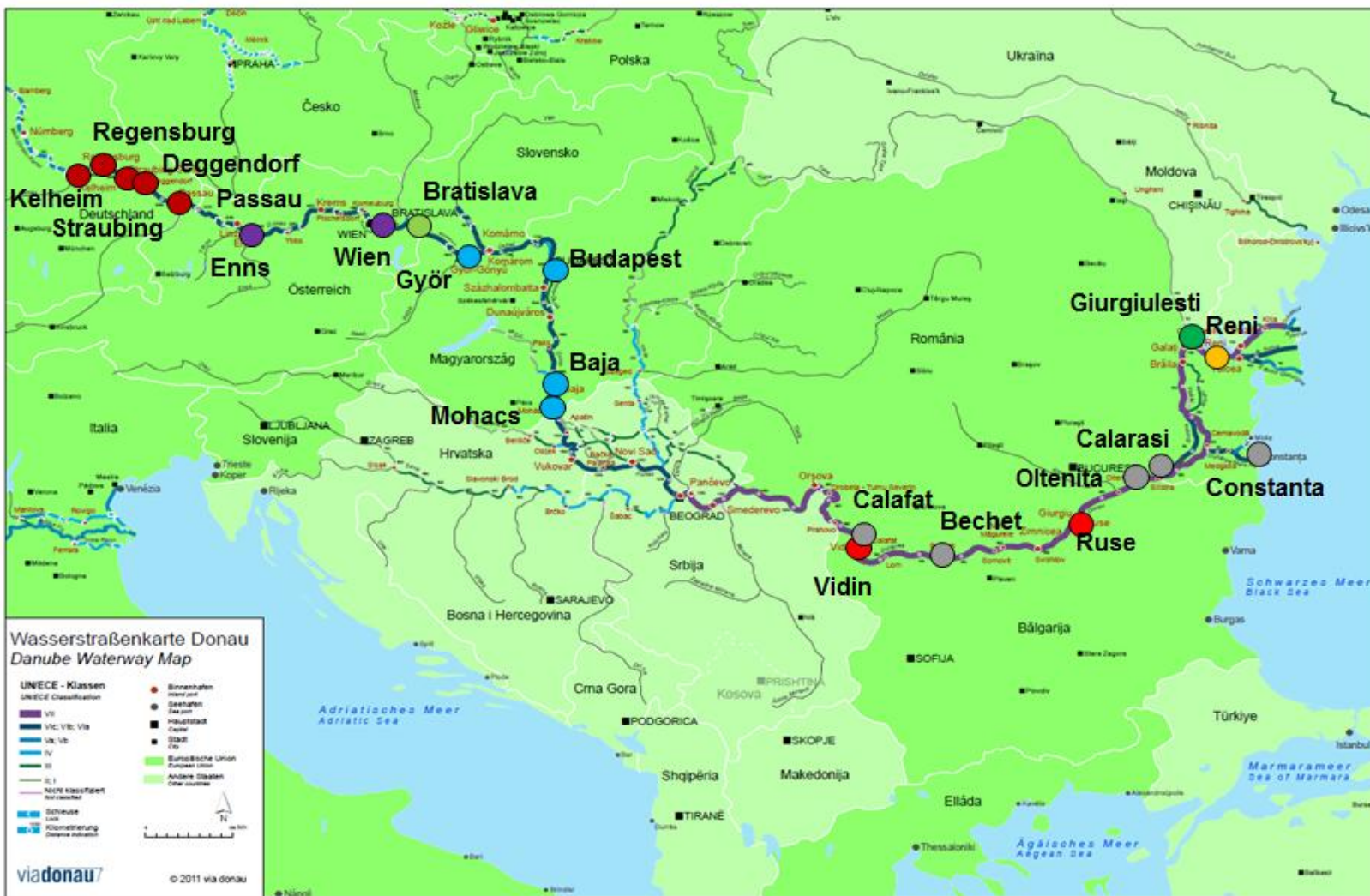
High & Heavy Ports	Country
Linz Felbermayr	Austria
Bratislava	Slovakia
Smederevo	Serbia
Belene	Bulgaria
Galati	Romania
Constanta	Romania





# Roll-on Roll-off Ports

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RoRo Ports	Country
Kelheim, Regensburg, Deggendorf, Straubing, Passau	Germany
Enns, Wien	Austria
Bratislava	Slovakia
Győr, Budapest, Baja, Mohacs	Hungary
Vidin, Ruse	Bulgaria
Calafat, Bechet, Oltenita, Calarasi, Constanta	Romania
Giurgiulesti-under construction	Moldavia
Reni	Ukraine

## II. Renewable Resources and Biomass

# Advantages of inland navigation for the transport of renewable resources and biomass

- **Cost efficient transport solution**, especially for bulk cargo
- **High loading capacity** of Danube vessels compared to other modes of transport
- **Reliable partners** with long-term experience and well established transport chains
- High density of Danube ports with efficient **handling and storage facilities** for agricultural products



Source: viadonau

# Potential of Renewable resources – results from market study

## Rape and colza

Production 170.000 t  
Usage 400.000 t  
Import 275.000 t  
Export 53.000 t

Import: HU, SK, DE  
Export: DE, SK, HU

- ✓ Locations
- ✓ Quantities
- ✓ Transport streams

 High Potential

## Sunflower seeds

Production 67.000 t  
Usage 112.000 t  
Import 98.000 t  
Export 46.000 t

Import: HU, SK, BG, DE  
Export: DE, HU, SK

- ✓ Locations
- ✓ Quantities
- ✓ Transport streams

 High Potential

## Soybean

Production 95.000 t  
Usage 142.000 t  
Import 108.000 t  
Export 61.000 t

Import: DE, HU, RO, SK, UK  
Export: DE, HU, SK

- ✓ Locations
- ✓ Quantities
- ✓ Transport streams

 High Potential

## Veg. fats and oils

Production 200.000 t  
Usage 470.000 t  
Import 420.000 t  
Export 130.000 t

Import: DE, NE, PL, RU, CZ  
Export: DE

- ✓ Locations
- ✓ Quantities
- ✓ Transport streams

 High Potential

## Wheat

Production 1,5 t  
Usage 1,5 t  
Import 0,8 t  
Export 0,9 t

Import: DE, HU, SK  
Export: DE, HU, RO

- ✓ Locations
- ✓ Quantities
- ✓ Transport streams

 High Potential

## Maize

Production 1,9 t  
Usage 2,5 t  
Import 0,9 t  
Export 0,3 t

Import: HU, SK, DE  
Export: DE, SK, HU

- ✓ Locations
- ✓ Quantities
- ✓ Transport streams

 High Potential

## Roundwood (in mil m3)

Production 17,8  
Usage 25,5  
Import 8,7  
Export 1,0

Import: DE, SK, HU  
Export: DE, HU

- ~ Locations
- ✓ Quantities
- ✓ Transport streams

 High Potential

## Sawnwood (in mil m3)

Production 9,5  
Usage 5,3  
Import 1,8  
Export 6,1

Import: DE, RO, HR, SK, HU  
Export: DE, HR, HU

- ~ Locations
- ✓ Quantities
- ~ Transport streams

 Medium Potential

## Panels (in mil m3)

Production 3,4  
Verbrauch 1,5  
Import 0,8  
Export 2,8

Import: DE, RO, HU  
Export: DE, SK, HU, HR

- ~ Locations
- ✓ Quantities
- ~ Transport streams

 Medium Potential

## Pellets

Production 940.000 t  
Usage 710.000 t  
Import 307.000 t  
Export 609.000 t

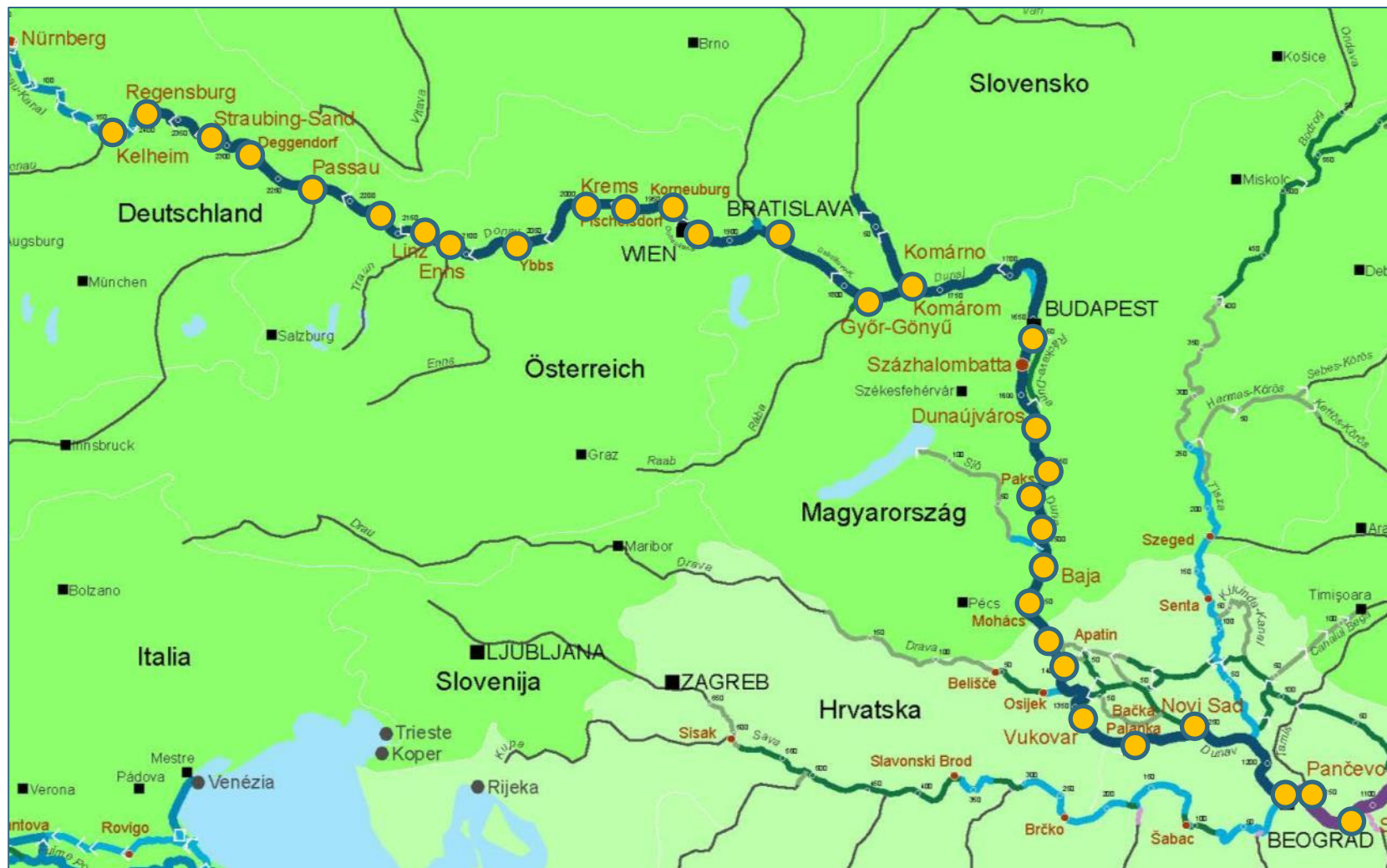
Import: DE, RO, CZ  
Export: DE, IT, CH

- ~ Locations
- ✓ Quantities
- ✓ Transport streams

 Medium Potential

# Danube ports and transshipment sites with equipment for agricultural products (1)

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# Danube ports and transshipment sites with equipment for agricultural products (2)

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# Summary initiatives

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## High & Heavy initiative

2010-2012

- Definition of the transport requirements of these goods
- Expert interviews with specialists from the industry
- Expert workshops with stakeholders involved in heavy transport (shippers, forwarders, ports, shipping companies)
- Additional events in cooperation with partners

## Renewable Resources initiative

2012-2014 (ongoing)

- Basic research completed
- Workshops on: (1) wood products, (2) vegetable oils, fats and biodiesel, (3) grain, starch and bioethanol
- Information exchange within workshops on Austrian level
- Expert workshops and presentation of good practices
- Positioning of the subject in the context of trade fairs and events



**INTERNATIONALISATION**

## In process: Market review analysis 2014–

### Geographical aspect:

All Danube riparian states included

### Examined sectors/branches:

Update of existing nine cargo groups + additional analysis of

Mineral resources and mineral oil products

- Metallic –and non metallic raw materials
- Energy raw materials (coal, LNG, LPG)

 **Basis for new initiatives**



**viadonau – Austrian Waterway Management Company**  
A-1220 Vienna, Donau-City-Straße 1

**Head of Team Transport Development**

Simon Hartl

T +43 50 4321-1614

M [simon.hartl@viadonau.org](mailto:simon.hartl@viadonau.org)

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