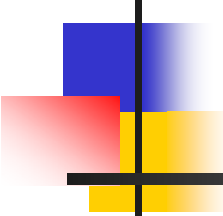


# Turnover/Output for Water Transport in Spain

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24th Voorburg Group Meeting  
Oslo, 14-18 September 2009



# Turnover/Output for Water Transport in Spain

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- Knowledge and size of the industry
- Evaluation of standard definition and product detail/levels
- Evaluation of comparability of turnover data with prices index
- Summary



# Knowledge of the sector

## ■ Statistics

INE

- Surveys of turnover (and other variables) from INE:
  - SBS
  - STS
- Other statistics from INE (National Accounts, Employment Statistics, Wages Statistics, Consumer Price Index, Service Producer Price Index,...)
- Statistics from Puertos del Estado (passenger and freight transport, maritime traffic, investments in ports, etc).

## ■ Industry representatives :

- Associations: ANAVE
- Enterprises



## Knowledge of the sector

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- **This study is based on INE information**
  - Surveys of turnover:
    - SBS
    - STS
  - Other statistics from INE:
    - National Accounts
    - Consumer Price Index (CPI)
    - Service Producer Price Index (SPPI)

## Knowledge of the sector: National Accounts and SBS

Table 7: Water transport services	Output (basic value)	Rate (%)	Intermediate consumption	Rate (%)	Value added (basic value)	Rate (%)
2000	1.938		1.199		739	
2001	2.024	4,4	1.306	8,9	718	-2,8
2002	2.279	12,6	1.503	15,1	776	8,1
2003	2.399	5,3	1.581	5,2	818	5,4
2004	2.610	8,8	1.731	9,5	879	7,5
2005	2.910	11,5	1.929	11,4	981	11,6
Source: National Accounts. INE (million euros)						

Table 4: Water transport services	Turnover	Rate (%)
<b>Year</b>		
<b>2000</b>	1.197	
<b>2001</b>	1.255	4,8
<b>2002</b>	1.260	0,4
<b>2003</b>	1.337	6,1
<b>2004</b>	1.499	12,1
<b>2005</b>	1.669	11,3
<b>2006</b>	1.863	11,6
<b>2007</b>	1.995	7,1
Source: Structural Business Statistics. INE (million euros)		

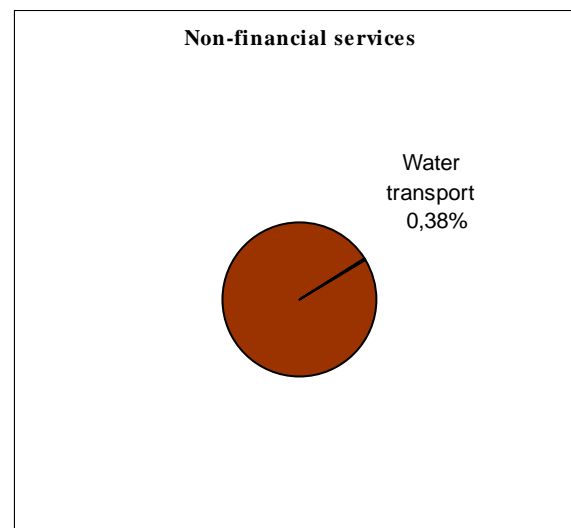
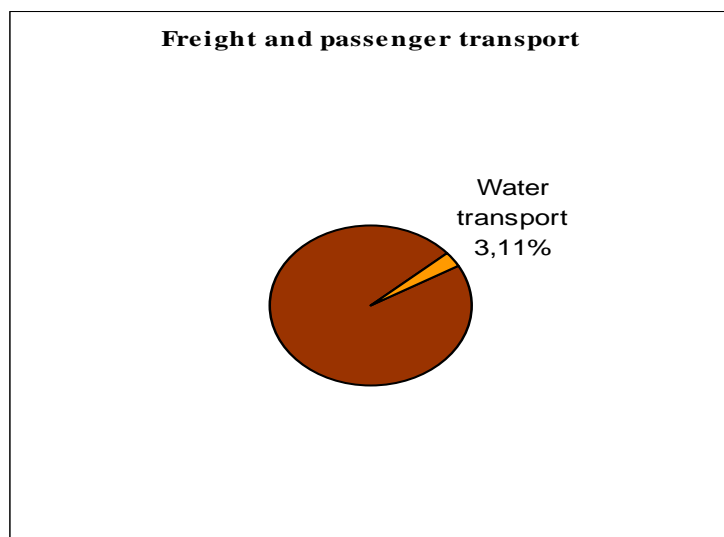
## Knowledge of the sector: National Accounts

<b>Table 3: Share of water transport in the economy</b>	<b>Value added (VA) of water transport</b>	<b>Value added (VA) of total economy</b>	<b>% of water transport VA on economy VA</b>
<b>Year</b>			
<b>2000</b>	<b>739</b>	<b>570560</b>	<b>0,13</b>
<b>2001</b>	<b>718</b>	<b>618252</b>	<b>0,12</b>
<b>2002</b>	<b>776</b>	<b>661517</b>	<b>0,12</b>
<b>2003</b>	<b>818</b>	<b>706932</b>	<b>0,12</b>
<b>2004</b>	<b>879</b>	<b>756669</b>	<b>0,12</b>
<b>2005</b>	<b>981</b>	<b>813776</b>	<b>0,12</b>
<b>Source: National Accounts. INE</b>			
<b>(million euros)</b>			

Water transport contributes about 0,17% to the GDP of Spain, (National Accounts 2005)

## Knowledge of the sector: SBS data

Table 2: Turnover (million Euros)	2007
Non-financial services	517.909,0
Transport	102.677,9
Freight and passenger transport	62.047,5
Water transport	1.994,9
Source: Structural Business Statistics 2007. INE	

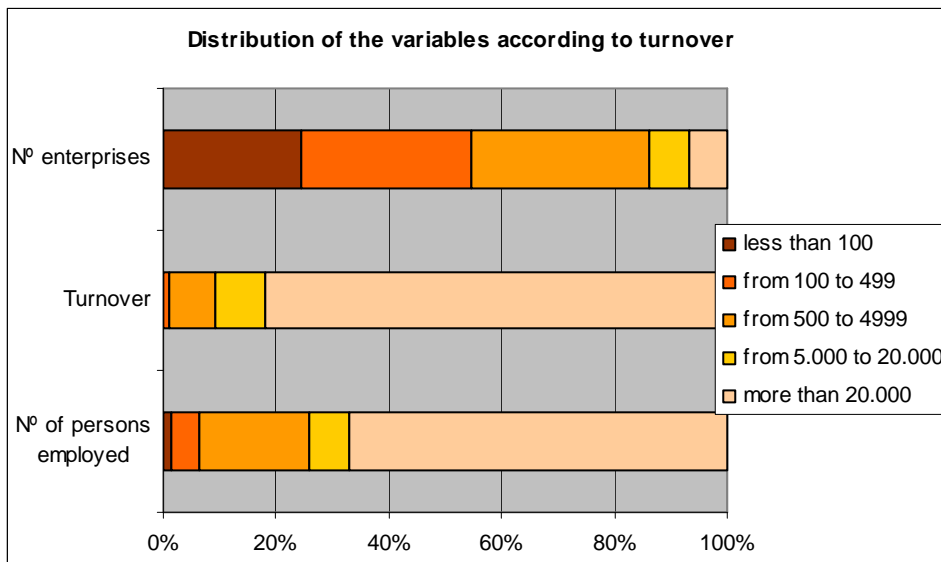


# Knowledge of the sector: SBS data

Table 5: distribution of the variables according to turnover

	Total	less than 100	from 100 to 499	from 500 to 4999	from 5.000 to 20.000	more than 20.000
Nº enterprises	263	64	80	83	18	18
Turnover	1.994.887	2.685	21.096	157.534	182.216	1.631.355
Nº of persons employed	7.860	113	379	1.549	562	5.258

Source: SBS 2007. Units of turnover: thousand euros



**Conclusion:** Water transport in Spain is a very concentrated sector





## Knowledge of the sector: SBS data

- **Specific question in Annual Service Survey (SBS)**
  - Breakdown of the turnover by type of activity carried out (in % of total turnover):
    - Passenger transport
    - Freight transport
    - Other activities

Freight transport  70%

Passenger transport  30%

# Evaluation of standard definition and market conditions

CPA has been developed mainly to collect the transport by:

- Kind of product transported
- Type of ship used in the transport

But to identify the products of the service of freight water transport is also important to distinguish by:

- Type of route:
  - Coastal (domestic) transport
  - Maritime (continental and intercontinental) transport
- Way of management of the ships:
  - Liner transport
  - Tramp



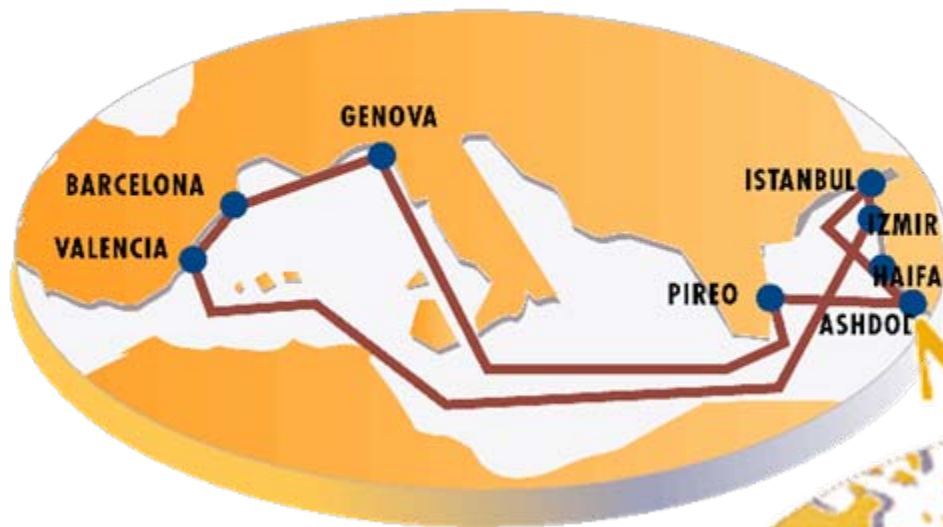
# Ways of management of the ships

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- ***Tramp:***
  - Occasional services
  - Non-repeated services
  - Ships with full load. Homogeneous load (**bulks**)
  - Ships like bulk carriers, oil tankers, chemical carriers
- **Liner transport:** scheduled routes with fixed time schedule
  - The ship carriers load from different and numerous loaders
  - Heterogeneous load (**general cargo**)
  - Ships like containers carriers, roll on and roll off,...)

# Example of real routes of liner transport

## IBERMED



## MEDANDES



# Turnover/output data method

## Turnover:

Table 9: Annual growth rates of turnover	STS (%)	SBS (%)
2004	8,8	12,1
2005	7,4	11,3
2006	9,3	11,6
2007	5,5	7,1

## Prices:

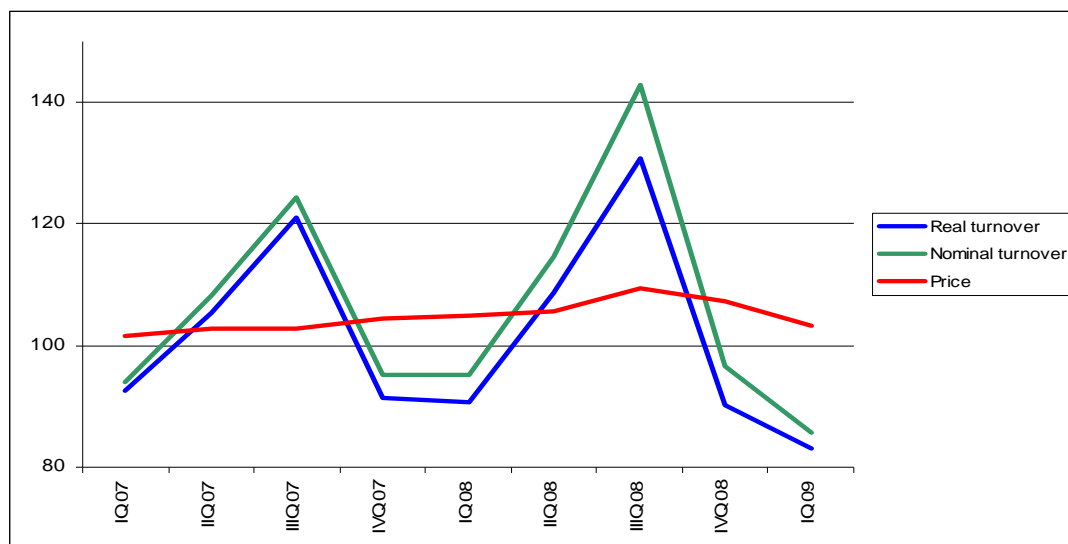
Table 10: water transport prices	HCPI	Quarterly growth rate (%)	Annual growth rate (%)	SPPI	Quarterly growth rate (%)	Annual growth rate (%)
I Quarter 2007	103,3			101		
II Quarter 2007	103,2	0,0		102,8	1,8	
III Quarter 2007	103,9	0,6		102,3	-0,5	
IV Quarter 2007	107,1	3,2		103,4	1,1	
I Quarter 2008	112,6	5,1	9,0	102,4	-1,0	1,4
II Quarter 2008	118,5	5,3	14,8	101,3	-1,1	-1,5
III Quarter 2008	126,3	6,6	21,6	103,6	2,3	1,3
IV Quarter 2008	124,3	-1,6	16,0	101,4	-2,1	-1,9
I Quarter 2009	120,3	-3,2	6,9	97,4	-3,9	-4,9

Source: INE

# Turnover/output data method

Table 11	Nominal Turnover	Annual growth rate (%)	Price	Annual growth rate (%)	Real Turnover	Annual growth rate (%)
I Quarter 2007	93,9		101,5		92,5	
II Quarter 2007	108,4		102,9		105,3	
III Quarter 2007	124,5		102,7		121,2	
IV Quarter 2007	95,3		104,3		91,3	
I Quarter 2008	95,2	1,3	104,9	3,3	90,7	-1,9
II Quarter 2008	114,8	5,9	105,7	2,7	108,6	3,1
III Quarter 2008	143,0	14,9	109,4	6,4	130,7	7,9
IV Quarter 2008	96,6	1,4	107,2	2,7	90,1	-1,3
I Quarter 2009	85,3	-10,4	103,2	-1,7	82,7	-8,9

Source: INE





## Conclusions

It is important for the product classification freight water transport to distinguish by:

- **Type of route:**
  - Coastal shipping (domestic)
  - Maritime (continental and intercontinental)
- **Way of management of the ship:**
  - Tramp
  - Liner transport

In Spain:

- Water transport is a very concentrated sector
- Water transport is a relatively small industry



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Thank you for your attention !

Any questions?

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