

What were the reasons for developing a traffic forecast for 2030?

A realistic assessment of the future traffic trends in Germany is the essential basis for the ongoing activities on compiling a new 2015 Federal Transport Infrastructure Plan. For this purpose, the Federal Ministry of Transport and Digital Infrastructure commissioned an up-to-date and scientifically sound traffic forecast, with 2030 as the horizon year.

What is the structure of the 2030 traffic forecast?

In total, the 2030 traffic forecast consists of six parts. Based on the 2030 regionalized structural data forecast, which forecasts economic and demographic trends, as well as on the 2030 maritime traffic forecast (forecast of maritime traffic, volume of cargo handled by ports and inland traffic to and from seaports), nationwide interconnectivity is determined in the form of origin-destination matrices of freight and passenger traffic for the baseline year of 2010 and the forecast horizon of 2030. This transport interconnectivity is „apportioned“ - as the experts phrase it - to the road, rail and waterway networks. The results comprise the traffic volumes and the vehicle mileage of the individual modes of transport on the individual route sections of the corresponding infrastructure networks for 2030.

What are the contents of the 2030 maritime traffic forecast?

The volume of inland traffic to and from seaports is subject to different determinants from those to which continental traffic is subject. Because inland traffic to and from seaports accounts for a sizeable proportion of the total volume of land traffic, this segment was addressed in a separate maritime traffic forecast for the horizon year of 2030.

The basis for the 2030 maritime traffic forecast was the regionalized structural data forecast. The first step was to determine the seaward catchment areas of the seaports relevant to Germany (i.e. seaports handling cargo whose movement involves the use of the German transport infrastructure) and to derive the resultant structures of seaward cargo handling. The maritime traffic forecast looked at a total of 36 seaports with traffic relevant to Germany – 19 German seaports and 17 seaports in other European countries.

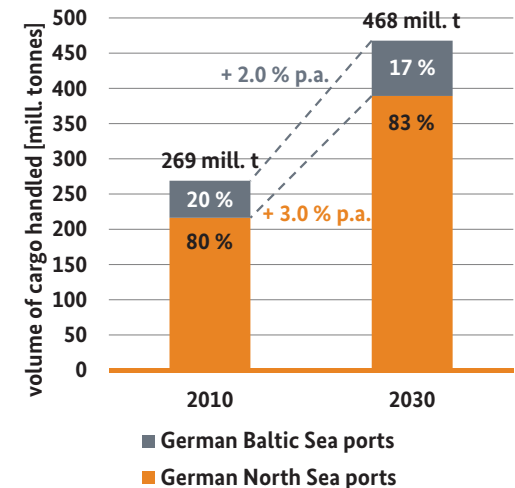
For each of these 36 ports, the cargo volumes handled relevant to Germany were broken down into sea-to-sea traffic (port transit), loco traffic (share of incoming and outgoing waterborne port traffic that remains in or originates from the port region) and hinterland traffic. In turn, this traffic was sub-divided by divisions of goods (NST 2007), surface transport modes, conventional freight traffic and container traffic.

What are the key findings of the maritime traffic forecast?

- The volume of cargo relevant to Germany that is handled by the 36 seaports considered in the maritime traffic forecast will rise from 438 million tonnes to 712 million tonnes (+ 63 % or + 2.5 % p.a.) between 2010 and 2030. Because of the growing value density of the goods, the rate of growth of the volumes of cargo handled is below the rate of growth of the real (adjusted for inflation) monetary external trade.
- At the North Sea ports relevant to Germany (German and foreign North Sea ports taken together), the volume of cargo handled will rise from 367 million tonnes in 2010 to 599 million tonnes in 2030 (+ 63 % or + 2.5 % p.a.). At the

German North Sea ports, there is likely to be an annual increase in volumes handled of 3.0 %.

- At the Baltic Sea ports relevant to Germany (German and foreign Baltic Sea ports taken together), the volume of cargo handled will rise from 59 million tonnes to 89 million tonnes (+ 51 % or + 2.1 % p.a.) between 2010 and 2030.
- For the German seaports on the North Sea and Baltic Sea, the maritime traffic forecast shows a sustained growth trend. The volume of cargo handled by the 19 German seaports considered will rise from 269 million tonnes in 2010 to 468 million tonnes (including transshipment) (+ 2.8 % p.a.). Here, the German North Sea ports exhibit a higher rate of growth (+ 3.0 % p.a.) than the German Baltic Sea ports (+ 2.0 % p.a.). This is due to the strong ties between the North Sea ports and the growth markets in Asia and America and to the above-average growth in container traffic.



- The volume of containers handled by the German seaports will grow from a total of 13.0 million TEUs (twenty foot equivalent units, a measurement of the capacity of container ships and volumes of cargo handled by ports) to 30.1 million TEUs between 2010 and 2030. The annual rate of growth in the volume of containers handled by German seaports (+ 4.3 %) is higher than the rate of growth in the conventional freight sector (+ 2.8 % p.a.).
- At the Mediterranean ports considered in the forecast, the volume of cargo handled relevant to Germany will rise from 12 million tonnes to 24 million tonnes (+ 98 % or + 3.5 % p.a.).

What will the findings of the 2030 maritime traffic forecast be used for?

The findings of the 2030 maritime traffic forecast relating to the forecast inland traffic to and from ports informed the 2030 forecast of transport interconnectivity.

Recommended links:

- **Federal Ministry of Transport and Digital Infrastructure**
<http://www.bmvi.de>
- **Federal Transport Infrastructure Plan**
Information on the Federal Transport Infrastructure Plan on the Ministry's website
http://www.bmvi.de/DE/VerkehrUndMobilitaet/Verkehrspolitik/Verkehrsinfrastruktur/Bundesverkehrswegeplan/bundesverkehrswegeplan_node.html
- **2030 Traffic forecast**
Internet article on the 2030 traffic forecast on the Ministry's website providing further information and downloadable final reports
<http://www.bmvi.de/SharedDocs/DE/Artikel/UI/verkehrsprognose-2030.html>

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The 2030 maritime traffic forecast

A brief overview of the maritime traffic forecast - a research project commissioned by the Federal Ministry of Transport and Digital Infrastructure

