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Article — Digitized Version

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Intereconomics

Suggested Citation: Merklein, Renate (1966) : The port of hamburg between east and west, Intereconomics, ISSN 0020-5346, Verlag Weltarchiv, Hamburg, Vol. 01, Iss. 9, pp. 27-29, <https://doi.org/10.1007/BF02922774>

This Version is available at:

<https://hdl.handle.net/10419/137642>

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The Port of Hamburg between East and West

By Renate Merklein, Hamburg

Now as ever Hamburg is a European port of world-wide importance. Among the ports of this continent it is holding the fourth place with a turnover volume of 35.3 million tons in 1965. As early as in 1956 the turnover volume of the last normal pre-war year 1936 (22.1 million tons) could be surpassed by almost 60 %.

This result, however gratifying it may be, is rather moderate as compared with the other West European harbours. Rotterdam's turnover surpassed the pre-war figure by 109 % already in 1956. In Amsterdam the increase amounted to 95.7 %, in the Bremen-ports to 267 %. The comparatively slow growth of Hamburg's port turnover has been caused by the change in West European regional data which is a consequence of the war and the post-war period.

Hamburg with its easternmost North Sea port has been affected most by the political and economic division of Europe. Part of Hamburg's traditional hinterland, i.e. Central Germany, Czechoslovakia and Roumania has been cut-off by the iron curtain, and in the EEC area Hamburg—the formerly central port—has now a peripheral location, at the intersection of the economic power-fields of the three large blocs: the EEC, EFTA and COMECON!

Loss of Traditional Hinterland

The political division of Germany and the integration effects of the COMECON area reduced Hamburg's hinterland turnover from 4.1 million tons in 1936 to about one quarter of this volume. The extensive integration of the Soviet-occupied Zone of Germany into the Eastern economic area—approx. 80 % of the Zone's foreign trade is effected with the Soviet Union—let this region's trade with non-communist countries shrink to approx. DM 900 million in 1964. Moreover, Hamburg, the traditional transit port for the Eastern regions is used less by the Soviet-occupied Zone's authorities. Aiming at autarchy in transports the leaders of the Zone expanded the Mecklenburg harbours and the "VEB Deutsche Seereederei" is building an East German merchant fleet. In the East German ports—above all Rostock—not only goods produced in the Soviet-occupied Zone of Germany are transshipped, in the long run this competition is threatening to contest Hamburg's international transit with the other people's republics that has increased again in the meantime.

Hamburg's transit with Czechoslovakia has reached the pre-war level again. Hungary's imports and exports in terms of volume have also reached the pre-war level. In the case of short-term bottlenecks in the grain trade—as e.g. in 1964—the people's republics favour Hamburg for effecting their imports, the port that with its storage capacity of almost 600,000 tons is guaranteeing a quick service: Thus the East-bloc countries' (including Yugoslavia) foreign trade wound-up via Hamburg has reached the post-war

record of 3.6 million tons. With that these countries participated in the port's total turnover with more than 10 %.

However, in the long run not only the Central German harbours and the uncertain political and economic developments in the East-bloc and between the industrial blocs are important to Hamburg: in addition to the competitor Rostock another new port is being built at the Yugoslavian coast: Koper, which owns a large free zone and does not only threaten Trieste but also Hamburg's position in the East European region.

Over and above that the Hanseatic port's hinterland transport is being impaired by insufficient approaches. The existing waterways prove to be insufficient for inland water transport as important and comparatively cheap connection with the West German hinterland. It is not only due to the political and economic division of Europe but also to the bad water supply of the Elbe that 1965 the turnover of inland water transport at 7.8 million tons did not yet reach the pre-war level (1936: 9.29 million tons).

Together with the frantic rehabilitation of the European economy and the growing exchange of goods between the individual regions also the measurements of inland waterways vessels have increased. The so-called European vessel is the planned objective in this field, a self-propelled craft owning a loading capacity of 1,350 tons. However, at present even vessels with 700 to 800 tons only, carrying more than three quarters of their loading capacity, cannot pass the upper course of the Elbe.

Structural Changes as an Outcome of Regional Differentiation

Not only does this negatively affect transport transactions with Eastern Europe burdened as they are anyway with political imponderables, but it also increases the effects of Hamburg's peripheral location within the West European economic area. European internal trade has increased more than proportionally by the pulling-down of trade barriers. The conglomeration of economic activities is increasingly concentrating on the Rhine/Rhone area. A major part of the interstate exchange of goods is not carried through by sea transport but by land.

From sea-borne transports Hamburg is profiting much less than the Benelux ports. With increasing liberalisation above all bulk goods whose prices are sensitive to changes in freights are increasingly directed to the cheapest transport routes. Therefore the flow of goods from and into the European centres of concentration is decreasingly directed via Hamburg. The harbours at the mouth of the Rhine that are better connected with industrial locations are favoured.

The consequences to Hamburg of this development are clearly shown by structural changes of its transshipments. While the share of bulk goods (goods moved by suction-pumps, gripping devices, and fluids) is declining more and more, in 1965 alone it decreased by 3 %, the share of valuable general commodities is growing steadily. Alone in 1965 the turnover of bagged goods and general commodities rose by about 65 %, its share in total transshipments increased from 32.8 % in 1964 to 34.6 % in 1965.

Parallel to the shifting of transports of bulk goods to the ports at the mouth of the Rhine there is a growing tendency of Hamburg foreign trade firms to emigrate to the Rhine area. This causes an additional detriment to the growth chances for Hamburg and its port.

That nevertheless Hamburg's port registers considerable transshipment-increases is a result of the following factors:

- ☐ more loco-transports,
- ☐ more transports from and to the Federal Republic,
- ☐ the increasing transit transactions with Scandinavia and Austria.

In consequence of the expanding industrial installations in the Hamburg area the flow of goods bound for Hamburg and arriving via its port has increased and has thus become an important factor of compensating for the declining hinterland trade. Moreover, the statistical loco-transports by no means cover only the home requirements of the Hanseatic City and its industries. A not inconsiderable part of the arriving goods is being stored and processed. After some time a major part of these products will be consumed somewhere else in Germany.

Today Hamburg is playing an important role again in the Federal Republic's foreign trade. In 1965 export goods from Western Germany to the value of DM 12,000 million were shipped via Hamburg, and West German import goods to the value of DM 10,700 million passed the Hanseatic City's port.

Efforts for Increasing Turnover

The Scandinavian countries are Hamburg's most important foreign customers. In 1965 approx. 3.6 million tons were transshipped for Finland, Denmark, and

Sweden alone. Transactions with the EEC countries (excluding the Federal Republic of Germany) amount to scarcely one third of the total turnover. About 30 % of the total oversea shipments are bound for the above mentioned Scandinavian countries.

On the whole the EFTA area is of much greater importance to the port of Hamburg than merchandise traffic with the EEC countries. This is clearly proved by the turnover volumes that are approx. 41.5 times the size of those with the EEC.

The fact that the Port of Hamburg is located within the EEC but orientated towards the EFTA countries makes the harbour dependent on political developments. The economic and political relations between the EEC and the other European countries are very important to the Hanseatic City's chances for maintaining its reputation as a European port of worldwide importance. It will be decisive for Hamburg whether the gap between the EEC and EFTA will be bridged and whether the EEC with its joint trade policy will be oriented towards liberalisation or protectionism in the long run.

However, even if developments should be favourable for Hamburg, extensive investments will be required in order to maintain the port's competitiveness. Even today, after the post-war reconstruction programmes have been completed for a long time already, the Hanseatic City is investing approx. DM one million weekly for its harbour. Storage capacity has doubled since the end of the war, and today 500,000 square-metres of storage place in magazines and warehouses are at the disposal of German and foreign customers. In order to avoid losses in quality and to prepare overseas primary commodities for further distribution, storage installations have been equipped with extensive technical facilities: drying installations and sorting-machinery for cocoa and coffee, heatable sheds for fruit from the South and large modern cold-storage plant. Storage capacity—Hamburg's great advantage vis-à-vis the competing ports—is continuously expanded and modernised.

The improvement of its approaches is even more problematic for the Hanseatic City than the expansion of its port capacity, as extensive investments by the Federal Government would be required for this task. For years already Hamburg's better connection



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with the network of inland waterways is most urgent. A North-South canal is in the planning stage that will begin upstream of the barrage at Geesthacht and end in the Midland Canal in the vicinity of Brunswick. Also bigger vessels could travel on this canal. Moreover, the connection with Central, South, and Western Europe would not only be shortened but also become cheaper.

In the long run an improvement of the connection with the Baltic will also become necessary, for already now the North-East Canal is hopelessly overburdened.

For some time already an outer port is under consideration—in the vicinity of Brunsbüttel—that will save the ships the 60 kilometres long approach on the Elbe.

After such a modernisation Hamburg's peripheral location between the three economic blocs might prove to be advantageous in the long run. In the course of a general loosening-up of economic- and power blocs an increasing exchange of goods may become possible and in this case Hamburg offers the best approach to the three large European economic blocs.

World Business Trends

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Western Europe Expanding Most Slowly

The economic trend in most West European economies has continued to be differentiated in the current year. Above all in the field of demand the position of decisive factors has been very different in individual countries. This is limiting the indicative value of a comprehensive consideration for the West European economic area. It is, however, remarkable that for approx. two years—and in spite of a radical regional shift in the crucial points of expansion—West European industrial expansion is growing at an almost unchanged speed, as the forces of acceleration and those of retardation always nearly balanced. It is true, though, that at present the growth of production (first half of 1966: + 4 % as compared with the previous year) is weaker than on a longer-term average (1960 to 1965: + 5.2 % annually).

In the first six months by far the strongest expansion of industrial production (excluding building) has taken place in Italy and France (+ 11 % and + 8 %, respectively). After in both countries the recession had been overcome already in 1965, in the current year their economies are rapidly expanding. In the Federal Republic of Germany and in Britain, on the other hand, the growth of industrial production has been only a slow one in the first half-year

(+ 3 % and + 2 %, respectively). Taking seasonal variations into consideration production has even declined in Britain in the last months. Also among the smaller West European industrial nations there have been considerable differences. While e.g. production expanded strongly in the Netherlands, in Sweden it even lagged behind the previous year's result.

An analysis by branches of activity shows—in spite of a different economic situation—certain common features in the individual countries. Thus the mining output has been declining in some of the most important producer countries, namely Britain, the Federal Republic of Germany and France. Furthermore in the first half of 1966 these countries' steel industries did not reach, or just reached, respectively, the previous year's corresponding volume. Merely Italy which is showing a considerable production increase, is an exception.

On the other hand, the output of the chemical industry rose above average in all four of the large West European industrial states, although there is a big difference between the two extremes, i.e. Italy and Britain. Apart from this structurally favoured branch also production of the textile industry increased generally above aver-

age. The exceptionally high growth rates in Italy and France (+ 17 %) are to be explained by the previous year's low level. These extraordinary fluctuations are mainly a result of different arrangements for carrying stocks.

In the United States industrial production is currently expanding much faster than in West Europe. In the first half of 1966 it surpassed by 9 % its previous year's corresponding level. Above all the quickly expanding production of capital goods and armament supplies (+ 18 %) has contributed to this development. The production of consumer goods rose in a considerably smaller degree (+ 5 %). During the past years the United States had maintained its advantage in production over Western Europe also without additional demand for military purposes. While between 1955 and 1960 the United States' industrial output increased by only 13 %, and the West European one, on the other hand, by 31 %, between 1960 and 1965 the speed of expansion in the United States at 32 % was even higher as against + 29 % in Western Europe. In this period a growth-conscious economic policy had already mobilised unutilised resources to such a considerable extent that the fast increase of defence expenditure beginning a year ago could cause tensions in the American economy.

In Japan, too, industrial production is rising at a noticeably higher