



**The Competitive Situation of
the Swedish Merchant Fleet
2015**

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Report 2015:3**

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Transport Analysis

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Summary

Transport Analysis (Trafikanalys) is mandated by the government to monitor the competitive situation of the Swedish merchant fleet, by which we mean the fleet of Swedish-registered merchant vessels. We also take into account the situation of the Swedish-controlled merchant fleet, which mirrors the competitiveness of the Swedish merchant shipping industry as a whole. While the Swedish-registered fleet continues to diminish in size, the Swedish-controlled fleet is expanding.

We also study developments in nearby countries, such as Denmark, Finland, Norway, the Faeroe Islands, Germany, the Netherlands, and the UK. Over the last decade, Denmark and the UK have experienced considerable growth in their fleets. Measured in deadweight tonnes, the fleets of the Faeroe Islands, Denmark, and Norway expanded in 2013, while the fleets of Finland, Germany, and the UK decreased in size.

The report also addresses the competitive situation of Swedish ports, which are crucial for the availability to Swedish industry of efficient import and export facilities. We describe freight handling through the ports and the trend towards fewer port calls by ever-larger vessels, which the ports must take into consideration. We also describe the competitive situation of sea transport vis-à-vis other means of transport, such as rail and road transport.

The core of the report is a review of recent developments in a number of areas influencing the competitiveness of the Swedish merchant fleet. These areas include tax regulations, staffing rules and costs, shipping aid, administrative costs, financing support, and research and development. The inquiry on tonnage tax recently presented its report, which forecasts that 125 vessels may benefit from the proposed tonnage tax system. Applications for Swedish maritime education have apparently been declining. This trend is negative over the long term and stands in contrast to the situation in other countries.

The goal in Sweden and the EU is that maritime transport should grow so that land-based transportation can be less crowded. Shipping as a mode of transport is traditionally slow to react to price increases, i.e., shipping is a relatively price-inelastic mode of transport. The price of maritime transport is currently low, making it more difficult for shipping to grow; at the same time, the so-called Sulphur Directive is increasing the cost of shipping fuel. The current low oil price is therefore lowering the burden on the shipping industry.



Transport Analysis is a Swedish agency for transport policy analysis. We analyse and evaluate proposed and implemented measures within the sphere of transport policy. We are also responsible for official statistics in the transport and communication sectors. Transport Analysis was established in April 2010 with its head office in Stockholm and a branch office in Östersund.