



**The Competitive Situation of
the Swedish Merchant Fleet
2016**

**Summary
Report 2016:1**

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Summary

The global fleet continued to grow in 2015, as did the EU fleet. In contrast, Swedish-registered tonnage decreased somewhat. In May 2016, Transport Analysis publishes new statistics describing the evolution of the commercial fleet in 2015.

Maritime infrastructure continues to be developed. Investments in fairway infrastructure are evident both in Sweden and abroad. New canals in Suez and Panama constitute global megaprojects, including from a historical perspective. In Sweden, the new entrance fairway to Gävle is being opened to traffic, while the work of upgrading the Södertälje lock and canal is continuing.

The Marine Strategy presented by the Government Office in 2015 was an important document that clarified our aims and set out future state initiatives for maritime traffic and the marine sector. As in previous years, we have systematically reviewed the development of key competitive factors:

- Changes in the tonnage tax regime stand out as the most important development treated in **Taxes and Other Regulations**. A Government resolution regarding a tonnage tax proposal is anticipated this spring. The Government Office has made a special effort to simplify regulations for the shipping industry. It is also evident that the lower price of oil has compensated for the costs imposed by the Sulphur Directive's cleaner fuel requirements, and that the Directive has not had the negative effects on maritime traffic that had been feared by some.
- No significant changes were noted in the area of **Staffing Rules and Staffing Costs** in 2015. Clearly, a shortage of competence still exists, particularly in terms of personnel in the technical area.
- **The Swedish Maritime Support Scheme** was expanded in 2014, a move that is bolstering the competitiveness of the Swedish maritime sector. However, it is unclear whether the change has had the intended impact.
- The Swedish Transport Agency made important changes in the area of **Administration and Inspection**. The Agency has introduced delegated inspections, meaning that the inspection fees are being substantially reduced, which specifically benefits tonnage under the Swedish flag. Certain other changes in the Agency's levies have also been adopted. The Swedish Maritime Administration raised pilot fees by 5% in 2015, while vessel-based fairway dues were reduced. The overall trend in the administration and inspection area appears to be positive, particularly with respect to maritime traffic under the Swedish flag.
- The **Research and Innovation** area appears to be progressing well. The state research funding provided via the Swedish Transport Administration has proved to be significant. Lighthouse remains an important Swedish actor in this area.

The overall impression is that the conditions for the Swedish merchant fleet developed appropriately over the year. As was the case last year, it is clear that maritime traffic, particularly as compared with lorry traffic on roads, has been somewhat disfavoured in terms of taxes and levies relative to its social marginal costs. As a result of reduced sulphur emissions from maritime traffic, the external costs of such traffic in the form of air pollution have decreased somewhat. Thereby the so-called "degree of internalisation" for maritime traffic has increased somewhat.



Trafikanalys är en kunskapsmyndighet för transportpolitiken. Vi analyserar och utvärderar föreslagna och genomförda åtgärder inom transportpolitiken. Vi ansvarar även för officiell statistik inom områdena transporter och kommunikationer. Trafikanalys bildades den 1 april 2010 och har huvudkontor i Stockholm samt kontor i Östersund.