TRANSPORT ANALYSIS

The international competitiveness of the Swedish maritime transport 2019

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Summary

Based on the available statistics, Transport Analysis notes that the Swedish Vessel Register has reversed the negative trends of recent years, and that the number of Swedish-registered vessels increased in 2018. The Swedish-registered commercial fleet of vessels exceeding 100 gross tonnes grew from 304 vessels in 2017 to 318 in 2018. The greatest increase occurred in the 1 500–4 999 gross-tonne size class, in which there was a 29 percent increase in the number of vessels and a 39 percent increase in tonnage. However, in the largest-vessel class, i.e., over 40,000 gross tonnes, the number of vessels and the tonnage did decline by several percentage points.

Over a longer period, i.e., since 2011, the vessel register in Poland saw a dramatic increase in registered vessels, measured in dead weight tonnage, as did the registers of Singapore, Malta, and the Faeroe Islands. Among our Nordic neighbours, Denmark's register displayed positive growth, while Sweden and Finland have seen negative trends since 2011.

The Swedish-controlled fleet has continued to grow. The total tonnage rose from just over 12 million gross tonnes in 2010 to just over 17 million in 2018, corresponding to average annual growth of just over 4 percent. The utilisation of the Swedish-controlled fleet as measured in gross days increased by 17 percent in 2018 compared with the year before.

This year's report pays particular attention to the market for Swedish ports, as well as to several aspects of Swedish ports in contrast to foreign ones. We note that Sweden has more and smaller ports than do many other countries, and that Swedish ports generally have a lower degree of utilisation and more unutilised capacity. Swedish ports are more dispersed geographically, meaning that, compared with continental ports, they serve local markets to a greater extent and there is less competition among them. Transport Analysis also notes that Sweden has no specific port legislation, and that the role of Swedish ports in the national transport system is relatively unclear.

Goods handling has increased somewhat at Swedish ports in recent years, albeit with major fluctuations and with major differences between port regions. Among foreign ports in Sweden's vicinity, Polish and Lithuanian ports have seen dramatic growth. Poland has seen large increases in both the number of registered vessels and in goods handling.

The core of the report comprises a review of the competitive conditions facing Swedish maritime transport. It addresses tax regulations, crewing regulations, maritime transport subsidies, administrative costs, maritime financial support, and research and development. The Swedish Transport Agency has continued its efforts to simplify regulations, considering the levies high and the administrative processes cumbersome relative to those in other countries. The delegation of tasks to vessel classification societies does not necessarily reduce the financial burden on vessels, although it does improve flexibility and is something that the ship owners themselves have sought. The Swedish Transport Agency's revenues from tax-funded enterprises have declined in recent years. The tonnage tax system now encompasses seven companies.

Developments in maritime training and the issuance of Swedish licenses constitute a key issue regarding the Swedish competence supply. The number of licensed sea captains has been declining in recent years. Looking at employment in the maritime industry, the statistics

indicate that the younger age groups are not as large as the older ones, posing a risk of personnel shortages in several occupational categories.

Transport Analysis data indicate that maritime transport has lowered its non-internalised marginal costs and increased its degree of internalisation. Maritime transport is the most environmentally and climate-efficient mode of transporting goods. Sea transport is not as efficient for transporting people, having relatively high social marginal costs per person/kilometre and less internalisation than do other modes of human transport.

Some improvements have occurred in the competitive capacity of the Swedish Vessel Register, and they also appear to have had an impact. Because other countries' registers and regulations are simultaneously gaining in both attractiveness and competitiveness, Sweden needs to outpace the others to catch up and achieve its maritime strategy objective of having the best regulatory system in Europe. The negative trend in Swedish-registered maritime transport can be broken.

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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.

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