TRANSPORT ANALYSIS

Swedish national freight transport strategy – mid-term review 2020

Summary
Report 2020:16

Swedish national freight transport strategy – mid-term review 2020

Summary
Report 2020:16

Transport Analysis
Address: Rosenlundsgatan 54
SE-118 63 Stockholm
Phone: 010 414 42 00
Fax: 010 414 42 20
E-mail: trafikanalys@trafa.se
Webaddress: www.trafa.se
Publisher: Mattias Viklund
Publication date: 2020-12-22

Summary

In this mid-term review of the Government's national strategy from 2018, *Efficient, high-capacity and sustainable freight transport – a national freight transport strategy*, the aggregated development in target areas of the strategy is analysed. The analysis is mainly based on quantitative data from 2019 or earlier. Thus, the Corona pandemic is not considered to have any effect on the results of this report. The analysis is supplemented with a general review of the use of strategies as an instrument for governance, and with qualitative investigations of thoughts and experiences of the industry and other stakeholders in the implementation of the strategy.

The strategy includes elements of both formal and informal governance. For informal governance, knowledge dissemination and collaboration are of great importance. A positive observation is that the freight transport strategy is perceived as important, urgent and necessary by the industry. However, it does not seem to have led to a direct change in stakeholder activities to any great extent. Requests have been made for more substantial measures and action plans, and the report discusses the role of the National Freight Transport Council in this context.

Analyses of aggregate statistics show that the target areas of *fossil-free* and *high-capacity* freight transport, display a development most in line with the strategy. Emissions have partly been reduced through an increased share of renewable energy and the use of biofuels. The infrastructure for fossil-free fuels and electricity for the transport sector is being expanded, and the proportion of vehicles and vessels adapted for fossil-free transport is increasing, although still at low levels. Freight transport capacity is strengthened both through work for longer and heavier trains and through strengthened load-bearing classes of the road infrastructure. It is noted, however, that capacity utilization remains high on the railway and the sensitivity to disturbance on the roads continues to increase.

In the area of more *efficient transport*, the same positive development is not visible. Our indicators of a transport-efficient society remain unchanged and the increase in energy efficiency of the last decade for heavy trucks, freight trains and aircraft, came to a halt between 2018 and 2019. No general development towards larger and heavier transports is observed in recent years. Based on total tonne-kilometres, no transfer of freight transport from road to rail and shipping can be discerned. When delimited to long-distance, domestic freight, the analysis shows a slightly increased share for rail and shipping and a reduction in truck transports. However, in this calculation freight transport by foreign trucks is missing, a component known to have increased in proportion over time.

There are no indications that the Swedish freight transport industry has significantly strengthened its *competitiveness*. The total export value showed a slight increase in 2019, but Sweden's foreign trade in freight transport shows a long-term negative trend with a trade deficit, i.e. a relatively large import of freight transport, especially in road transport. The share of Swedish-registered trucks in transport work in Sweden is declining and the Swedish-controlled shipping fleet, in number of vessels, decreased slightly in 2019 after a few years increase. A closer analysis of sub-sector revenues shows that Swedish hauliers and airlines strengthened their market shares during the period studied, while the shares for Swedish shipping companies and train operators decreased, both in absolute and relative terms.

In the strategy's focus area *Innovation, competence and knowledge*, it is positive that the number of students in vocational transport education has increased significantly in recent years. In contrast, at the universities and colleges, the number of students in transport-related technical educations has decreased, as well as in doctoral programs with a focus on transport.

Both Swedish research and Swedish patent applications in freight transport stand out particularly well in international competition when it comes to climate issues and climate solutions. It looks worse in the digital area where both research and patent applications in freight transport to a relatively low degree apply to issues or solutions related to information and communication technology. From a European perspective, Sweden has a relatively high and growing proportion of patent applications in digital communication but shows zero growth in the transport area. There are several reasons to question the generalization of innovation capacity in the field of digitization to other areas. Innovation statistics show a relatively low degree of innovation activity among transport companies as a service sector. From a European perspective, the innovation gap between the freight transport industry and the rest of the service sector is particularly large in Sweden. The report discusses the interrelationship between innovation activities and digitalisation in the field of freight transport in relation to the attractiveness of higher education - an issue that needs to be better clarified.

The connection between the observed development in the transport system and the nature of the strategy's various focus areas is discussed in the report. The observations suggest that a continued and determined work is required to meet the objectives of the national freight transport strategy. That there are only isolated indications that the work with the strategy has had effects on our indicators may appear discouraging, but it should be noted that a large part of the efforts is still in progress and not completed. In addition, the underlying conditions for freight transport may have changed though the effects are not yet visible on an aggregated level.

Finally, some comments are made on issues that may need special attention in the continued work on the national freight transport strategy. These issues include the communication around the strategy and its activities, the different conditions for governing change on different levels, the importance of a reduced capacity for innovation in the transport sector and finally the limited availability of data specific for freight transport.

TRANSPORT ANALYSIS

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 2010 with its head office in Stockholm and a branch office in Östersund.

Transport Analysis
Rosenlundsgatan 54
SE-118 63 Stockholm

Phone +4610 414 42 00
Fax +4610 414 42 20
trafikanalys@trafa.se
www.trafa.se