

**The international competitiveness of
the Swedish maritime transport 2021**

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Summary

The purpose of this report is to describe the situation of Swedish maritime shipping in terms of international competition, with a focus on 2020. We first analysed the impact of the Covid 19 pandemic on shipping in the first quarter of 2020 in our previous report for 2019. This year's report offers a picture of the effects of the pandemic on Swedish shipping throughout 2020 and analyses the first two quarters of 2021.

While goods traffic in Swedish ports was largely able to continue despite the pandemic, passenger traffic came to almost a complete halt, which had major consequences for many Swedish ship owners. This was also discussed in our previous report. In this year's report we can see that there was a turnaround during the first half of 2021, with increases in both goods and passenger traffic. We can also see that employment among seamen has looked more favourable during the first half of 2021.

The reduced traffic in 2020 resulted in major turnover losses among ship owners. From March 2020 through February 2021, turnover from Swedish shipping was, on average, 25 per cent lower than in 2019. From March 2021 through June 2021 turnover was, on average, even lower, roughly 30 per cent lower than for the corresponding period in 2019.

The number of onboard employees (calculated as employees per day) in the Swedish-registered fleet decreased by 32 per cent in 2020. The number of financial staff shrank the most, decreasing by 43 per cent. The number of ships' engineers, mates and captains decreased by 12–14 per cent.

However, in the second quarter of 2021, a turnaround was evident in terms of unemployment compared to the first quarter of 2021. The Swedish Public Employment Service statistics on openly unemployed people (who can take a job on short notice) showed that the unemployment rate in May and June was nearly 50 per cent lower than for the same months in 2020. The long-term competence supply remains weak, and the number of maritime certifications issued fell dramatically in 2020.

The Swedish-registered merchant fleet remained stable in 2020, with 317 vessels (>100 gross tons). Swedish-registered tonnage declined somewhat, with chartered tonnage decreasing the most, leading to a decrease in vessels and tonnage for the Swedish-controlled fleet.

Regarding registrations, monitoring and inspections, the simplification process conducted by the Swedish authorities appears to have come to a standstill, while the so-called eco-bonus system, which promotes the shifting of goods from shipment by road to shipment by water, has been extended, and the Swedish Government will recommend MSEK 100 in annual funding from 2022 through 2024. At the same time, maritime transport aid decreased somewhat, and in 2020 (2019), 33 (37) shipowners were granted a total of BSEK 1.2 (BSEK 1.6) in such aid.

The Swedish Transport Administration and the Swedish Energy Agency remain important funders of maritime research. Several research projects focusing on digitalisation and the environment are also underway.

Transport Analysis finds that 2020 was not a positive year in terms of Swedish shipping's international competitive situation, but 2021 does look more promising.



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.

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