



GREEN **STRING** CORRIDOR

## Fundamental changes in the development of transport

The Green STRING Corridor project has published a new report: The Green STRING Corridor and Transport Development. The report is written by Roskilde University, Denmark. It looks into developments in the transport structure in the STRING region, i.e. Scania, Zealand, Schleswig–Holstein and Hamburg, and identifies a number of opportunities and threats for the transport- and logistics industry in that region.

Globalisation has made its mark on transport development; production has been relocated from wealthy, industrialised countries and service plays a more prominent role, particularly in Nordic foreign trade. Moreover, several products become lighter or change into different types of products. This calls for renewed attention to transport development, particularly in Northern Europe. The present report looks into the development within the STRING region.

Globalisation will undoubtedly require an efficient, predominantly maritime, international transport system worldwide. Transnational trade will increase traffic and it will be supported by developments in the international division of labour. Globally, we will see a general tendency toward increasing transport volumes, primarily maritime.

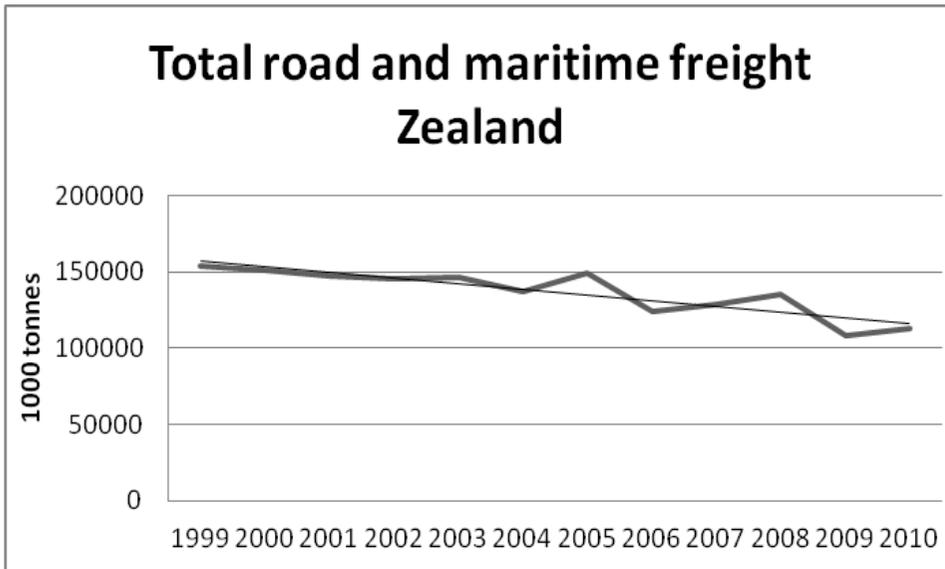
Yet, the situation in the STRING region (Scania, Zealand, Hamburg and Schleswig-Holstein) is more varied and complex.

In the STRING region, Hamburg is the primary gateway to the global market. The North German ports, the ports in Scania together with Oresund Bridge and the ports across Zealand make up the pivot of the transport system and constitute the primary haulage routes to Germany and Europe. A prime requisite for sustaining the Single European Market is a fast and efficient transport system.

The report shows that freight transport has undergone fundamental changes. The volume of freight transport in Zealand is decreasing and has decreased in the past 11 years. In Scania, the quantity of freight from that region has also decreased slightly, although the area has also seen a moderate rise in kilometres driven per transport within Scania. Schleswig-Holstein has generally had a slight increase in truck transports, yet since 2008 these have been declining too. The only exception is Hamburg where the volume of freight has increased, though with the exception of a minor decline also since 2008.

The question is whether we are seeing a dematerialisation of trade between countries where service is becoming increasingly important. This will undoubtedly influence the quantity of freight. Add to this that many products become lighter, such as electronic equipment and products made of plastic as well as other light materials. Moreover, relocation of

production from the STRING region also affects the quantity of goods. Clearly, the crisis is a factor, but it is far from the only factor. Zealand, for instance, has had a gradual decline over a longer period of time.



Source: Eurostat database

The decline has been most marked in Zealand:

The development has been less distinct in Scania, which has had a decrease in quantity of freight, but a small rise in kilometres driven.

These circumstances question the progress of the transport industry, in which both Swedish and Danish transport operators are under pressure as regards prices concerning their dealings with pure transport services.

The situation also challenges the relation between pure transport services and qualitative transport- and logistics services. A more integrated transport structure of companies/customers and logistics operators might be a solution in the increasingly competitive market.

Stagnation and decrease in freight volume bring up the question whether we are seeing a dematerialisation of trade between countries in which service is gradually becoming more important. Moreover, many products become lighter, such as electronic equipment or products made of plastic and other light materials. Together, these circumstances influence transport developments in the STRING region.

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