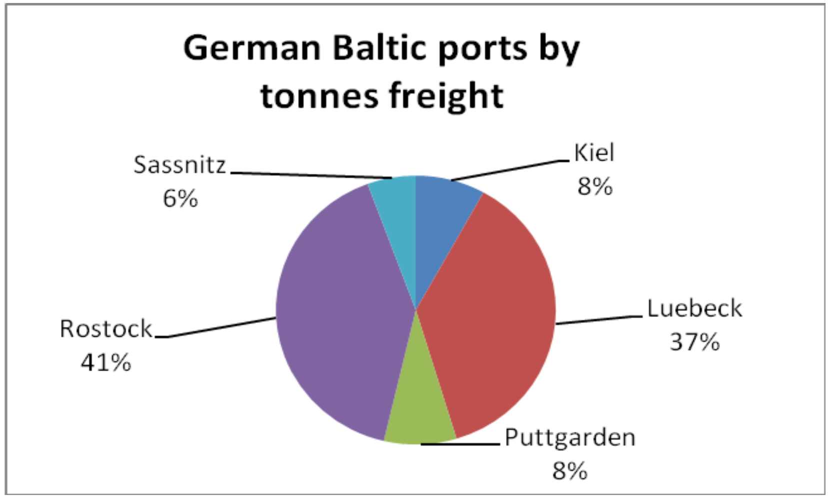
The German Baltic ports face new challenges

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.



Source: Eurostat, database

The report reviews the role of the German Baltic ports in the present transport structure. It finds that the German ports Luebeck, Rostock, Kiel, Sassnitz and Hamburg play a vital role in the current transport structure. Yet, particularly the position of the Baltic ports in the transport system may be challenged. And this goes for both the German and Swedish ports in the Baltic Sea.

On the German side, the ports Kiel, Puttgarden and Luebeck are part of the STRING region, while the two remaining ports, Rostock and Sassnitz, belong to the transport structure.

The German ports receive goods from Scandinavia (Sweden, Denmark and Norway) in a longitudinal as well as transversal structure from Finland, Russia and the Baltic States. The ports thus hold a key position in the transport structure connecting Scandinavia/the Baltic States and Germany/Europe. Based on the total volume of freight, freight trains and trucks are dispatched from these ports to European destinations. If the volume of freight is reduced due to the fixed Fehmarn Belt link, will the remaining freight be enough to sustain the rail connection from the Baltic ports to Germany/Europe?

The report asks: "How will the opening of the fixed Fehmarn Belt link in 2021 affect the basic transport structure?

The new Fehmarn link will enable freight trains to cross Zealand en route from Scandinavia to Germany. Today, that is not possible via the Rodby-Puttgarden connection. Moreover, 631,700 trucks are yearly transported between Scania and Germany via ferries from Sweden. Add to these goods that are shipped and reloaded to rail in the Baltic ports. The report

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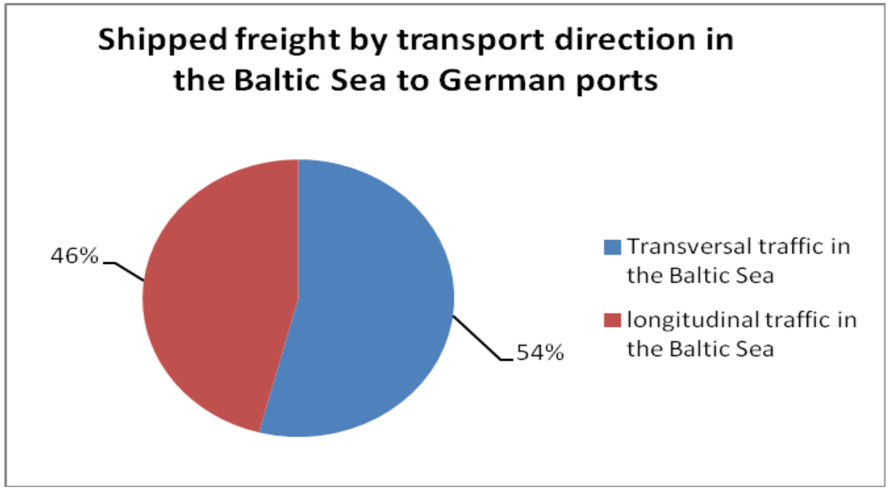
does not answer the question, but provides background material to understand the issue.

Regarding longitudinal freight shipment, 57 per cent comes from Sweden, 22 per cent from Norway and 21 per cent from Denmark.

Transversal traffic is traffic from the Baltic States, Russia and Finland. In this case, 39 per cent comes from Finland and 29 per cent from Russia.



Source: Eurostat, database

For German and Scandinavian business and industry the new Fehmarn link will clearly offer a speedier haulage route to the markets in Europe. Fast and safe transport is essential for business progress. The report notes that the challenge of the ports will be to counteract the speedier transport, which the new and fast connection will entail.

Shipping companies and ports in the region have already begun to rearm for the future intensified competition. New and bigger ferries are being built to service the routes to Denmark and Sweden. Ports are being expanded and modernized with orbital roads and new quays.

The current transport structure will undoubtedly be challenged and the transport pattern will change. The purpose of the Fehmarn Belt project is to create a faster link between Germany/Europe and Scandinavia. But how will it affect the overall transport system, which is also important for the Baltic States? Another factor to bear in mind is the German ports regarding rail traffic further into Europe. Thus, in order to fully understand all transport-related consequences of the fixed link, an overall view of the current transport structure is necessary. The report does not present answers, but based on a survey of the current transport structure, it raises the above-mentioned question.

Meanwhile, we have seen an increase in traffic crossing Oresund Bridge and a traffic decrease for the Helsingor – Helsingborg connection. The Oresund Bridge, alone, had about 358,104 trucks crossing in 2011. Also in 2011, Helsingor had 363,600 truck transfers. Since the opening of the bridge and until today, we have seen a shift of a little over 100,000 trucks a year from Helsingor to the Oresund Bridge.

Undoubtedly, Zealand's declining freight volume will bring new challenges to the transport industry - not least because Danish trucks only cover about 34 per cent of the export haulage from Denmark. Consequently, attention is directed toward types of transport services that can generate a greater added value, such as more and supplementary services that go beyond purely transport-oriented services. This aspect will be the focal point of a subsequent report from Roskilde University.

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