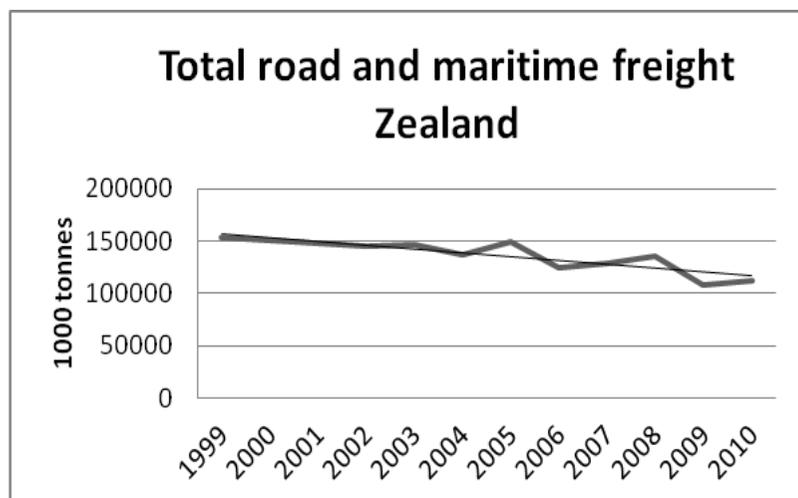




GREEN **STRING** CORRIDOR

Zealand transport structure and its 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.

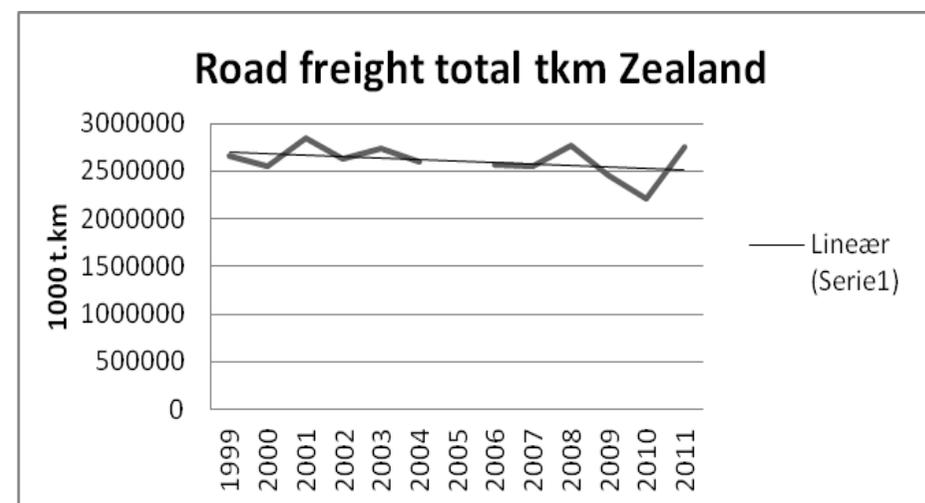


Source: Eurostat, database

The basis of this analysis is the opening of the fixed Fehmarn Belt link in 2021. Plans and discussions concerning the impact of the link have already begun. The report analyses the existing transport structure. It

serves as a background report aiming to provide a better understanding of the existing transport system once the tunnel opens. Certain characteristics will be described here.

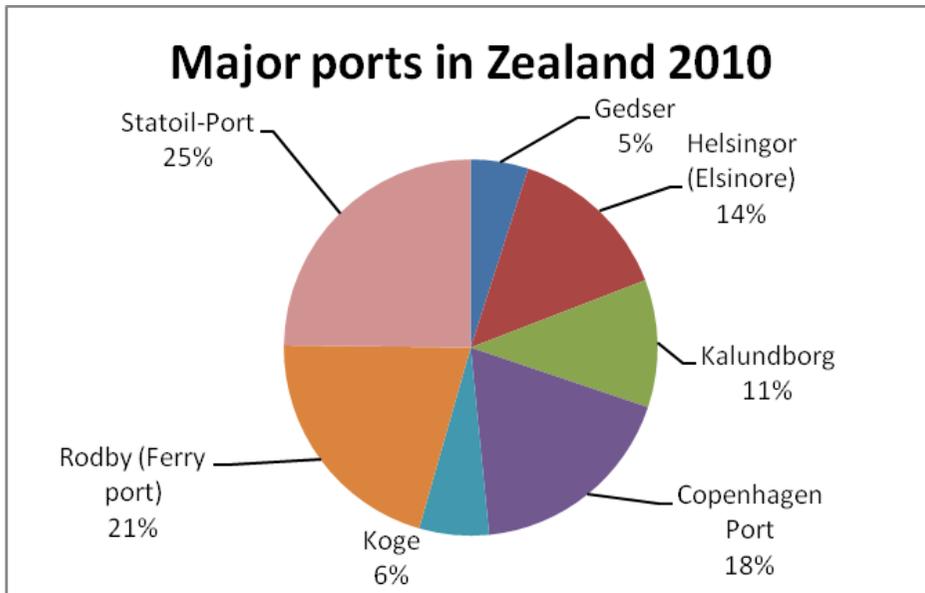
As the figure shows, the proportion of road freight over Zealand has decreased in the past 11 years. Despite a few years with minor increase, there has generally been a decrease. The decline in kilometres driven is not as significant as the decrease in volume of goods, although we do see a decrease in this respect too.



Source: Statistic Denmark

Changes in volume of freight are largely due to changes in the industry, which has been relocated from Zealand. Moreover, the nature of produced and consumed products is changing; products are generally

becoming lighter and the consumer pattern is changing. This does not necessarily make freight transport less important. The time factor - to be 'just in time' - and new distribution systems put new demands on transport operators. Services and experiences play an important role in consumer pattern. Consequently, passenger transport also seems to be an important element for industry progress.



Source: Eurostat, database

Three ferry services and the Oresund Bridge account for Zealand's most important international transport routes. Particularly the ports and the bridge are important in terms of volume of freight. As far as quantity is concerned, rail and flight cargo is less substantial, but may be important for other industries.

Rodby and Gedser ports provide the primary ferry services between Germany and Zealand. Secondary ports are Copenhagen, Helsingor, Koge and Kalundborg.

The two ports that connect Zealand with Germany and Europe are Gedser and Rodby.

Ferries from both Gedser and Rodby have transported increasing volumes of goods up until the crisis in 2008. For Gedser port the decrease does, however, begin already in 2007. Yet, both ports are affected by the crisis, although we have seen a new increase in the recent years. For Rodby, transit traffic accounts for about 42 per cent of the truck transfers.

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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