



Changes in Scania's freight transport structure

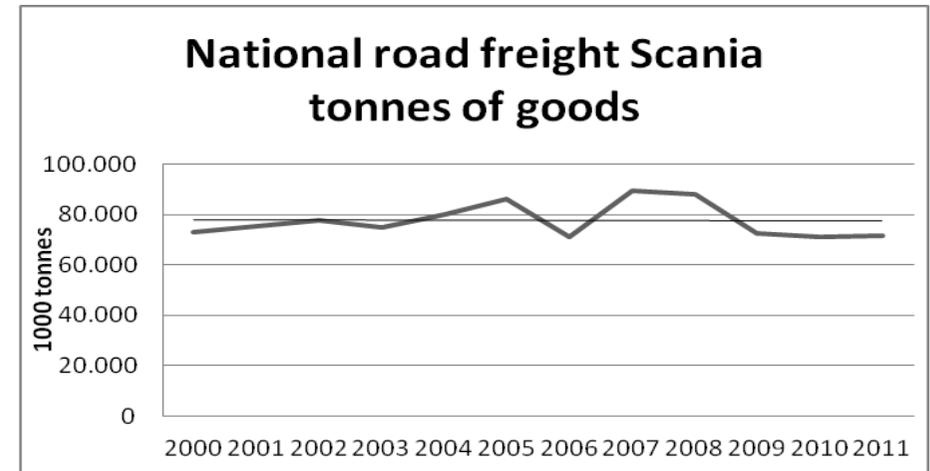
The Green STRING Corridor project has published a new report: The Green STRING Corridor and Transport Development. The report is written by Roskilde University, Denmark. It looks into developments in the transport structure in the STRING region, i.e. Scania, Zealand, Schleswig–Holstein and Hamburg, and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

The reason for this analysis is the opening of the fixed Fehmarn Belt link in 2021. The development of the transport structure is already being discussed so as to better understand the existing transport pattern when the tunnel opens. The aim of the report is thus not to analyse developments in transport after 2021, but to describe the existing transport structure.

As regards freight transport, Scania is strongly characterised by its gateway role to Denmark, Germany and further into Europe.

The graph shows that Scania has had a limited decrease in volume of freight after 2007.

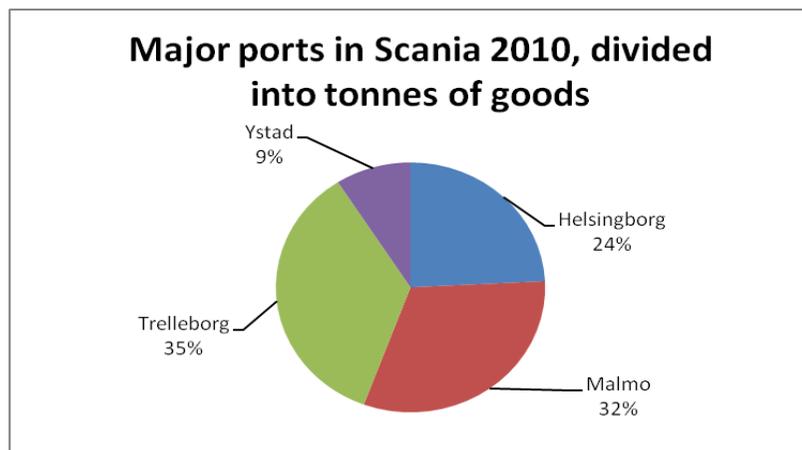
However, if we look at t.km, which represents the transport of one tonne of goods over one kilometre, Scania has had a small increase. These are goods that are unloaded and loaded in Scania and thus not transit goods.



Source: Trafikanalys Sweden

Although the tunnel between Denmark and Germany does not open until a number of years, its consequences and how it will affect transport development are already being discussed.

As a basis for this discussion, the report analyses developments in the past 11 years, rather than future transport developments. As regards Scania, particularly the development of the transport structure between Scania and Germany/Denmark has been discussed. Scania holds a strong position in the Scandinavian transport pattern. A great number of transports from Sweden to Germany pass through Scania via Trelleborg in particular. A shift has occurred, however. When the bridge opened in 2000, 42 per cent of the total truck transport from Scania was dispatched to Denmark. Today it is 46 per cent.



Source: Eurostat database

As the graph illustrates, Malmo and Trelleborg are the predominant ports in Scania. The opening of a fixed link between Germany and Denmark will undoubtedly affect the existing transport structure. The opening will offer a shorter and speedier direct route over Zealand to Germany for both train and car/truck transports.

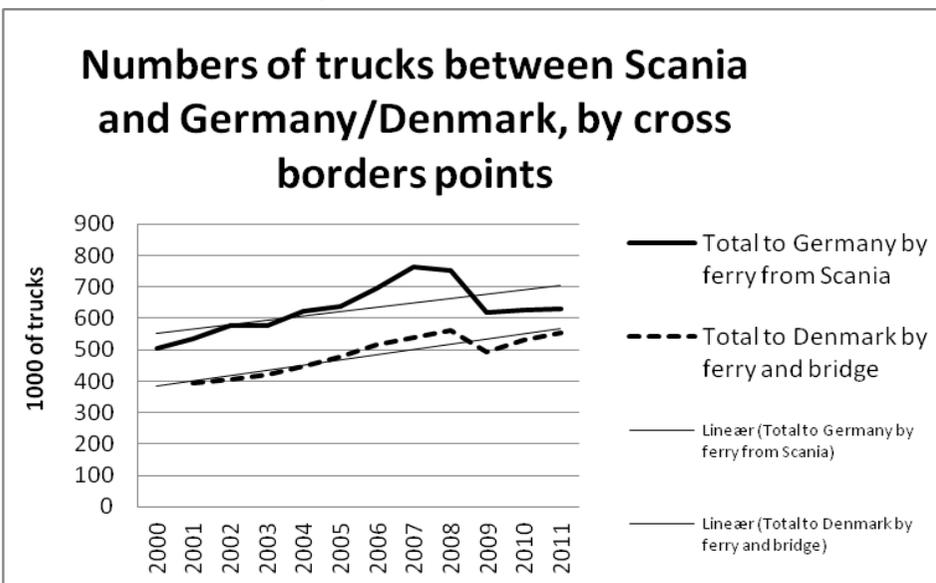
As the graph shows, truck transport by ferry to Germany still constitutes the majority of transports from Scania. No less than 631,700 trucks a year head for Germany. Of these, 528,700 depart from Trelleborg to Germany.

Add to this about 42,000 railway freight cars per year. If all rail freight cars were to cross Oresund Bridge, it would entail about 6 train sets more per day. Today, approx. 23 – 25 train sets cross the bridge per day. Train operators have the rights to lead about 60 train sets across the bridge per day, which means the route does have the capacity for more freight. Yet, the challenge may rather be regarding passengers, as faster connections to Hamburg will require more long distance trains.'

Much rail freight has already moved from Trelleborg to the bridge. In 2000 the number of freight cars from Trelleborg to Germany was 119,300. Today, the number has dropped to 42,000.

Ports on both sides of the Baltic Sea are thus already beginning to rearm for the future, intensified competition; that goes for both Trelleborg and Ystad. They invest in orbital roads, new quays and new ferries.

Overall, the ferries in Scania hold a key position in the general transport pattern. Part of this position will naturally be challenged when the fixed Fehmarn Belt link opens. Yet, in return we will get a faster connection to Germany/Europe.



Source: Trafikanalys Sweden

Author: Povl A. Hansen (Roskilde University), pah@ruc.dk

Project: Sandrina Lohse (Region Zealand), sloh@regionsjaelland.dk