TransBaltic

Case study:
The Fehmarn Belt fixed link and the effects on logistic strategies and development zones

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Baltic Sea Region
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SKÅNE

Partners and co-workers

Partners:
- Region Skåne
- Region Västra Götaland
- Öresund Logistics/Lund University
- Region Sjælland
- Øslandssamarbeided
- Fehmarn A/S

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Photograph: Fehmarn A/S

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Baltic Sea Region Programme 2007-2013

REGION SKÅNE

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“Fehmarn Belt Region”

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Objectives

Explore how the Fehmarn Belt fixed link may affect logistic strategies:

- the company flows and distribution chains
- to support Green corridor development by political decisions and policies
- to provide input to TransBaltic action plan

Working process

1. Litterature study:

- 38 reports/projects
- mainly Danish, Swedish and Norwegian material

2: Interview study:

- 18 companies
- Cargo owners and carriers
- Denmark, Sweden, Norway and Germany

Macro perspective dominating

1. Litterature study:

Perspectives:

- 34 macro level approaches on transport analyses
- 4 qualitative studies, all Danish

Content:

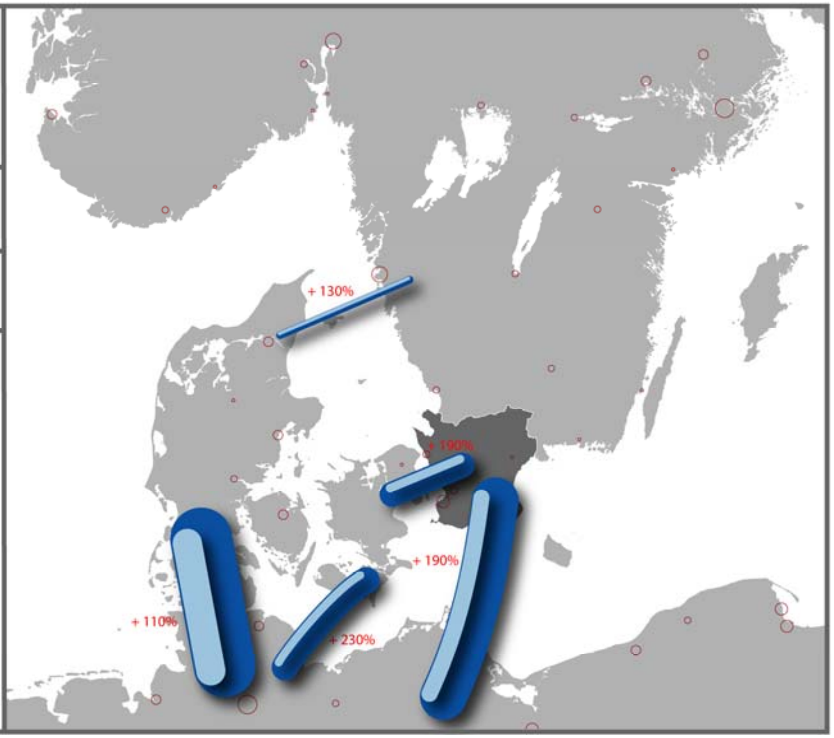
- focus on railway transport macro flows

Lack of discussion:

- Terminals
- Maritime transport – its role in intermodal development

Expectations on Fehmarn Belt fixed link

1. Litterature study:



- increasing railway volumes and intermodal transport
- Increasing capacity problems with remaining railway bottlenecks after the fixed link is in operation
- increased importance of southwest BSR as logistic area

Interviewed companies

2. Interview study:

Danmark	Sverige	Norge	Tyskland
Freja Transport & Logistics A/S	TX logistik	CargoNet AS	Gödecke logistics
DB Schenker Rail Scandinavia A/S	Stora Enso Logistics	DB Schenker AS	Alpa
Alex Andersen Ølund A/S	SSAB EMEA	Bring Linehaul AS	Carl Spaeter GmbH
Kim Johansen Transport Group AS	IKEA	Norske skog Saugsbrugs	
Royal Unibrew A/S	Anonymt företag	Hydro Aluminium Rolled products	

Structure

2. Interview study:

Källa: IBU-Öresund

Three themes:

1. location and logistic structures
2. changes in companies transport flows
3. potential for intermodal transport

Two scenarios:

1. 2020 decided investments
2. 2030 railway bottleneck removed including:
   - Fixed link Helsingborg – Elsinore
   - Route 5

Effects on location

2. Interview study:

0= no impact 1= weak impact 2= impact 3=strong impact	Relocation	Expansion
Transporter Road	0	2
Transporter Rail	0	0
Cargoowners	0	2

Effects on transport flows

2. Interview study:

0= no impact 1= weak impact 2= impact 3=strong impact	Time	Costs	Driv/rest times
Transporter Road	2	3	3
Transporter Rail	3	2	0
Cargoowners	3	3	0

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Towards an integrated transport system in the Baltic Sea Region

Effects on location

2. Interview study:

0= no impact 1= weak impact 2= impact 3=strong impact	Relocation	Expansion
Transporter Road	0	2
Transporter Rail	0	0
Cargoowners	0	2

Potential intermodal development

2. Interview study:

General trend toward intermodal transport due to:

- fuel prices and road charges
- cost efficiency for transporting large volumes
- environment – but not to any cost
- key factors – shorter lead time and delivery precision

Difficult to relate to Fehmarn Belt fixed link, due to:

- unknowned cost
- infrastructure standard and capacity on surrounding network
- lack of flexibility in railway system
- cross border obstacles
- taxes and regulations

Policy implications

Harmonize taxes fees and regulations

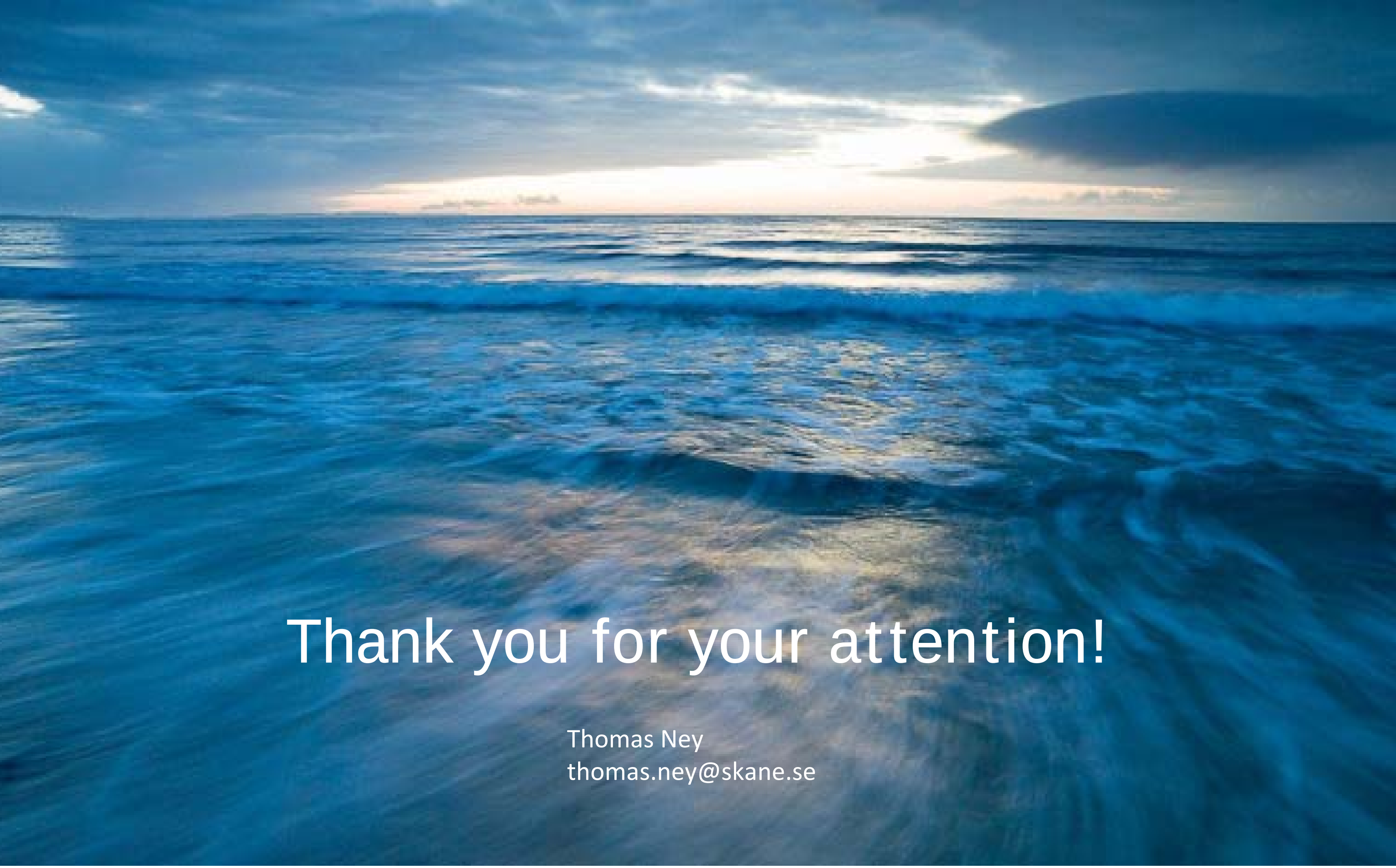
Corridor planning for railway/intermodal transport
- bottlenecks
- technological differences
- Reliability
- Redundancy

Increased capacity crossing Öresund

Location of truck stop services

Development of logistic zones
- increased importance of zones in western Skåne and Copenhagen
- no indications that new logistic zones will arise

Harmonize taxes fees and regulations



Thank you for your attention!

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