



**spc**

**Multimodal**  
Transport Solutions



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## ShortSeaShipping in Northern Europe – Challenges, Outlook, and Differences to Southern Europe

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**Athens, June 2019**

# Agenda

Introduction of spc Germany

Structure

Mission

Members

Significance of Shortsea Shipping

Germany

North Range ports

Challenges and outlook

Brexit

Environment and climate

EU

<b>Name:</b>	<b>ShortSeaShipping Inland Waterway Promotion Center (SPC)</b>
<b>Operator:</b>	<b>Verein zur Förderung des Kurzstreckenseeverkehrs e.V.</b>
<b>Founded:</b>	<b>2001, Hamburg / Headquarters in Federal Transport Ministry, Bonn</b>
<b>Legal form:</b>	<b>Registered society / Public-Private Partnership (PPP)</b>
<b>Members:</b>	<b>Federal Government (Transport Ministry), German states, corporations, chambers, associations, companies</b>
<b>Member of:</b>	<b>European Shortsea Network (ESN)</b>
<b>Mission:</b>	<b>The society's function is to further shortsea and inland waterway shipping within integrated multimodal transport chains. A main aim is to shift traffic to waterborne modes of transport.</b>
<b>Goals:</b>	<b>Increasing the share of cargo transport by waterways and rail.</b>

# Members (public institutions)



Bundesministerium  
für Verkehr und  
digitale Infrastruktur

Der Senator für Wirtschaft,  
Arbeit und Häfen



Freie  
Hansestadt  
Bremen



Hamburg

Behörde für Wirtschaft,  
Verkehr und Innovation



Rheinland-Pfalz

MINISTERIUM  
DES INNERN, FÜR SPORT  
UND INFRASTRUKTUR



Baden-Württemberg

Bayerisches Staatsministerium für  
Wohnen, Bau und Verkehr



HESEN



Hessisches  
Ministerium für  
Wirtschaft, Energie,  
Verkehr und  
Landesentwicklung



Niedersächsisches Ministerium für Wirtschaft,  
Arbeit, Verkehr und Digitalisierung



SACHSEN-ANHALT

Ministerium für  
Landesentwicklung und Verkehr

Mecklenburg  
Vorpommern



Ministerium für Energie,  
Infrastruktur und Digitalisierung

SH



Schleswig-Holstein  
Ministerium für Wirtschaft,  
Verkehr, Arbeit, Technologie  
und Tourismus

Ministerium für Bauen, Wohnen,  
Stadtentwicklung und Verkehr  
des Landes Nordrhein-Westfalen



# Overview of members (private)



C. Steinweg (Süd-West Terminal) GmbH & Co. KG



# spc – Goals and Responsibilities

## Major activities

### Information / Consulting



### Training and education



### Marketing / PR



### Networking





# Best Practice: Lübeck – Catania (I)

## Truck Transport

## Commodity: Papier Products



Truck-Route: 



# Best Practice: Lübeck – Catania (I)

12,6 Mio. tkm per year (~ 200 Trucks)



SSS-Route:



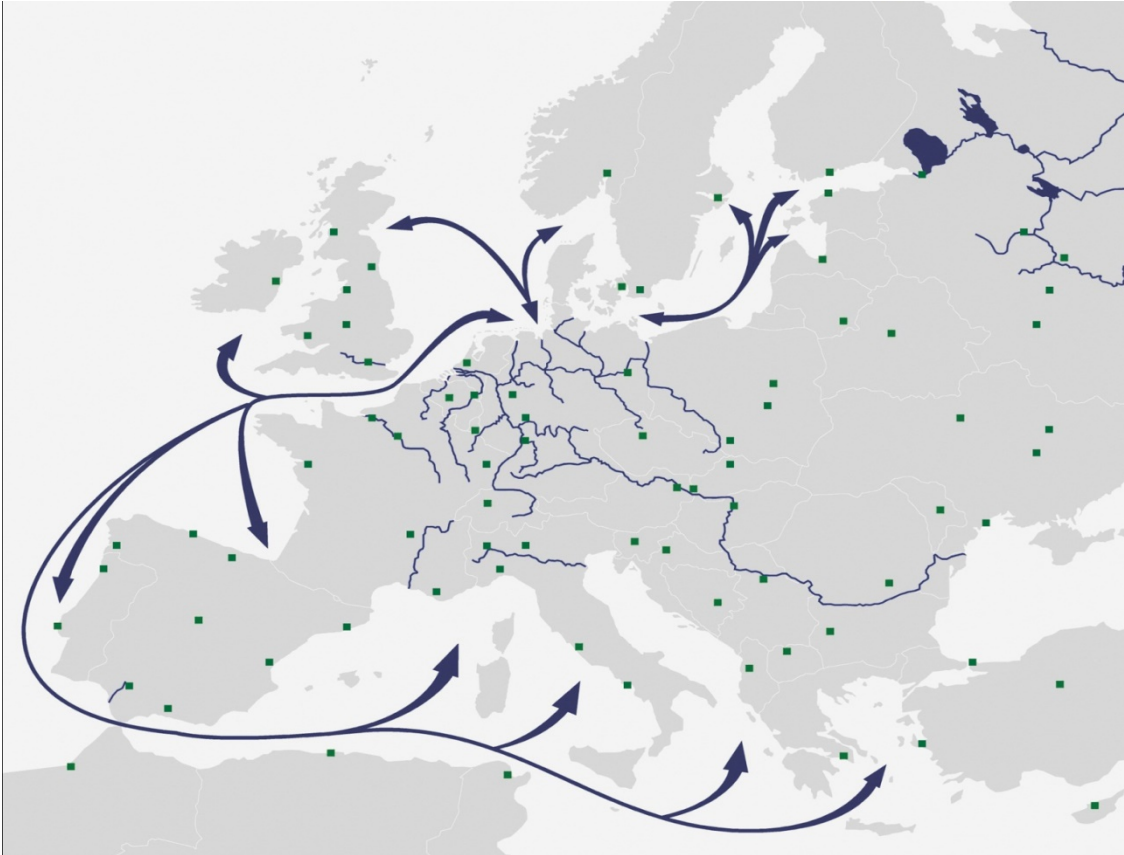
Roads: A1, A7, A3, A9, A99, A8, A93





# ShortSeaShipping Europe Continent / Inland Waterway System Germany

## BUNDESWASSERSTRASSEN

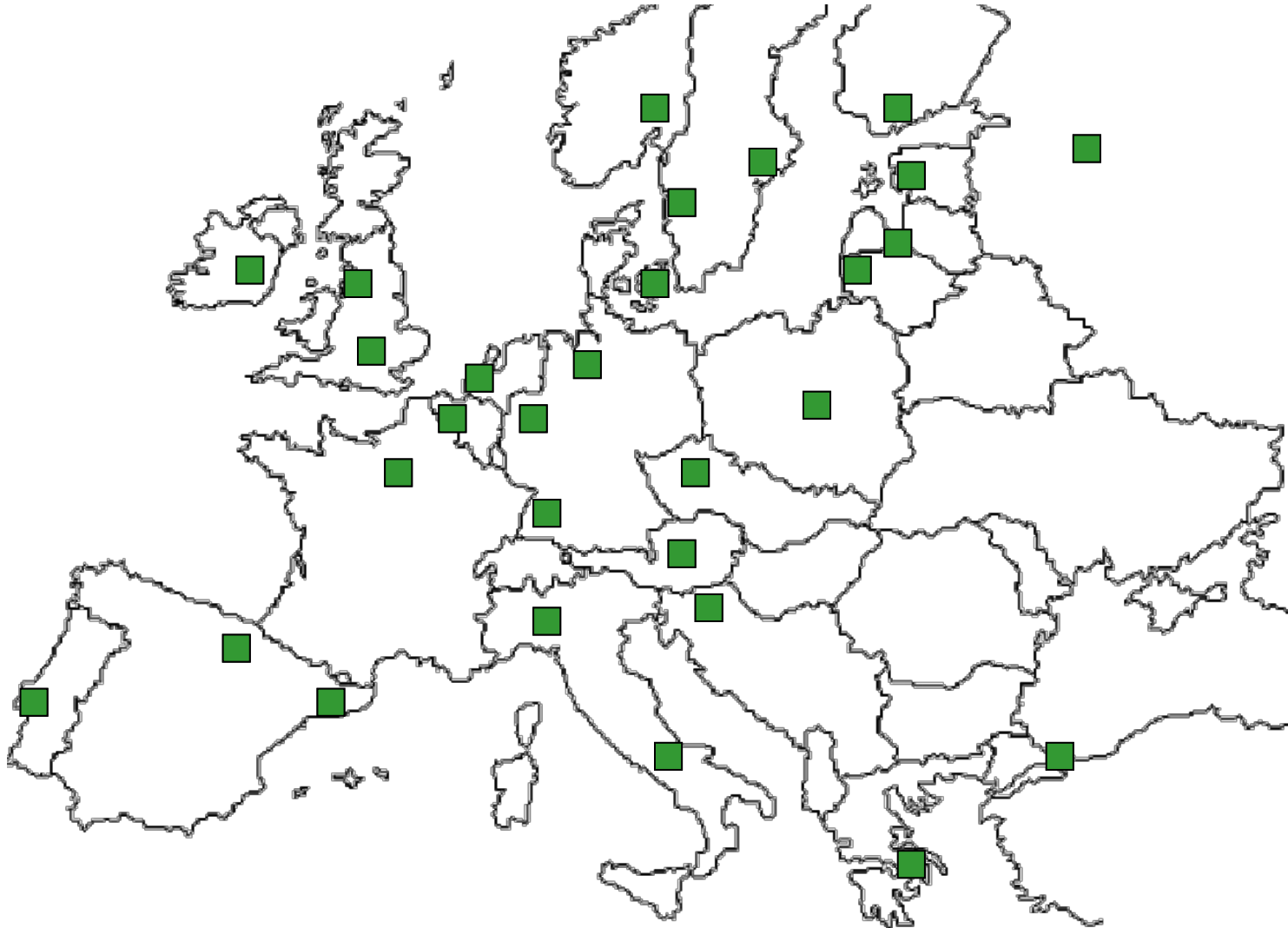


Quelle: Bundesministerium für Verkehr und digitale Infrastruktur, Januar 2014, Karte W 162 o  
Kartographie: Fachstelle für GeoInformationen Bild, Regensburg, zur Verfügung gestellt gemäß GeoNutzV  
Bundeswasserstraßen, die eine Länge von unter 5 km aufweisen, sind maßstabsbedingt teilweise nicht dargestellt.

- Hoheitsgrenze
- Staatsgrenze
- Landesgrenze
- Seewasserstraßen des Bundes
- Binnenwasserstraßen des Bundes
- nicht klassifizierte BinWaStr
- WaStr-Klasse I - III
- WaStr-Klasse IV - VI

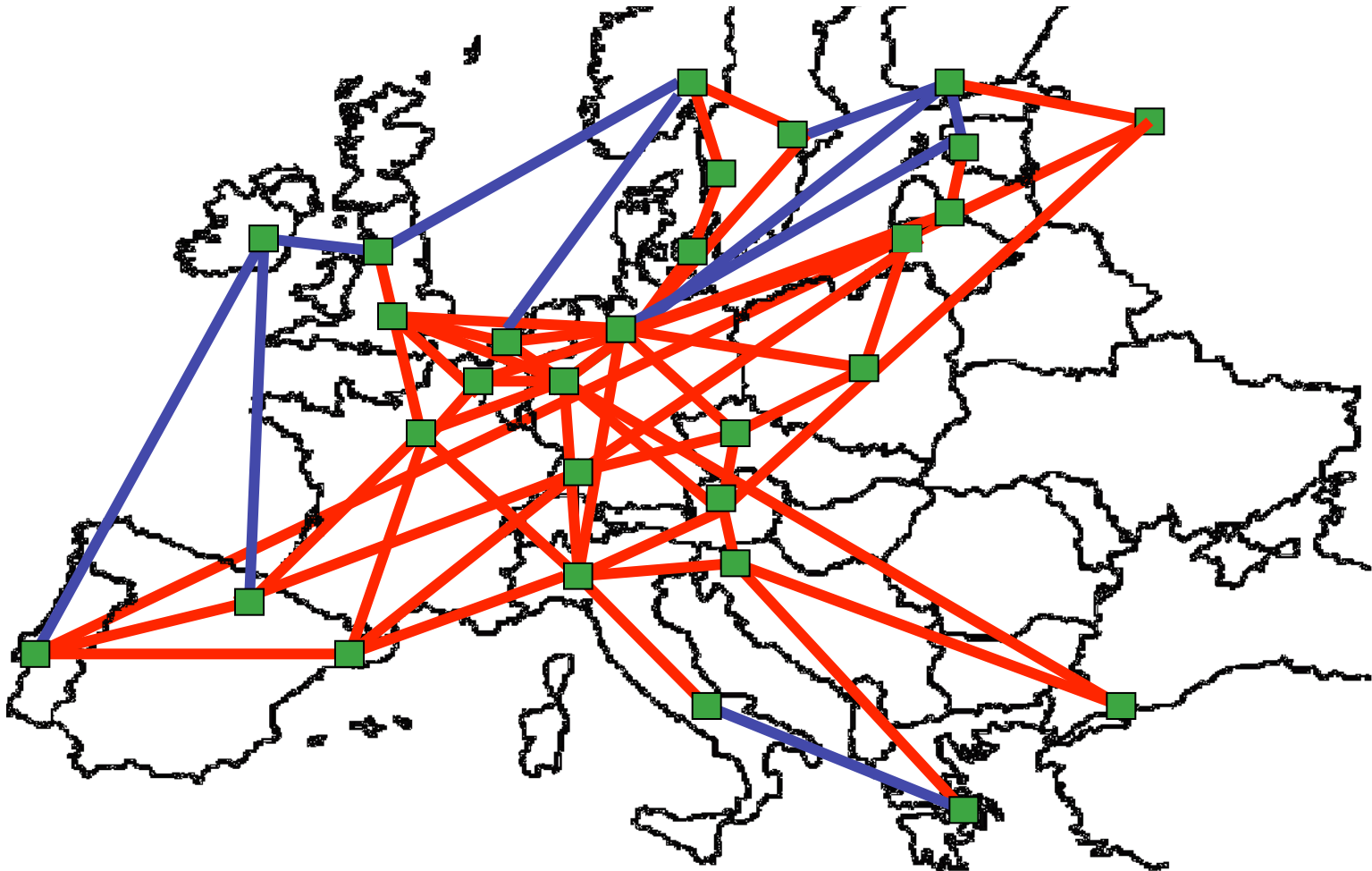
# System: ShortSeaShipping

## European Industrial Zones



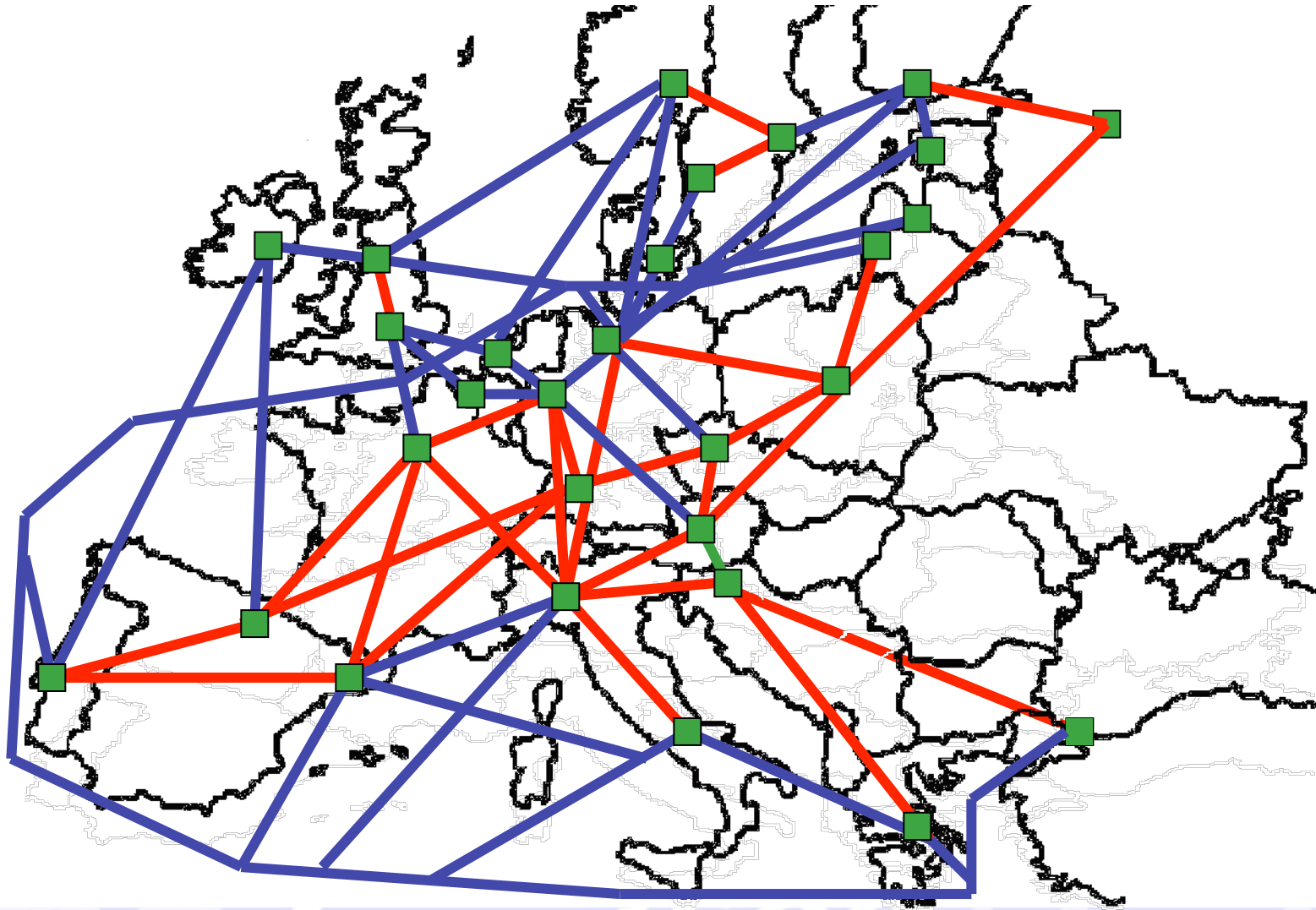
# System: Waterways

Trucking dominates European cargo transport



# System: Waterways

Waterways = Transport resources





# Significance of ShortSeaShipping for Germany

Cargo throughput in the German seaports is often thought of only in terms of shipping to and from Asia and North America and the share of shortsea shipping is ignored or underrated.

However:



## Shortsea-Trade prägend für deutsche Häfen

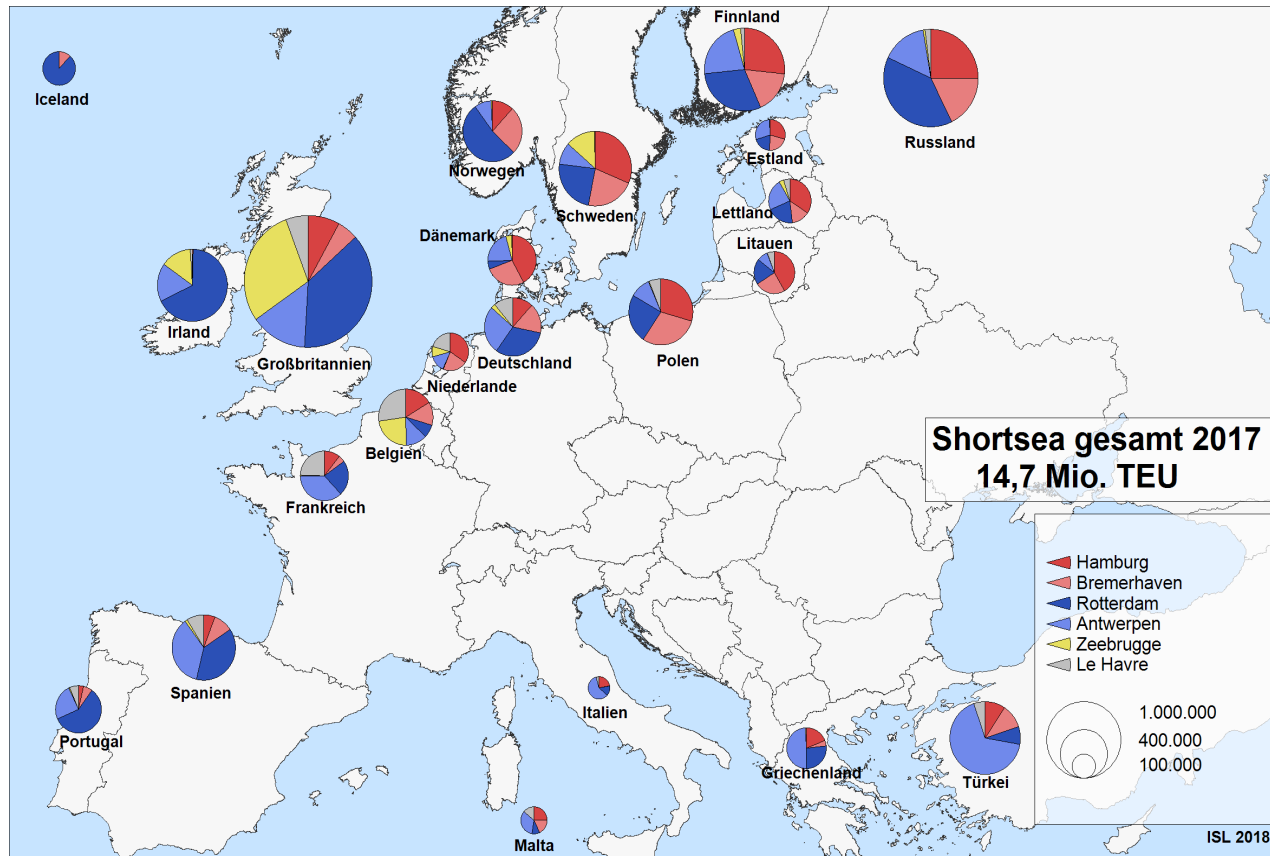
Über 185 Millionen Tonnen für 2017 – Neuer BAG-Bericht analysiert Ladungsströme – RoRo-Verkehr als Treiber

(Shortsea-Trade defining for German Ports)

Shortsea shipping's share of the total throughput in German seaports  
= approx. 62%



# Significance of Shortseas Container Shipping for the North Range Ports



## Total Shortsea Volume Container (Reference year 2017)

14,7 Mio. TEU (34% of total Container throughput)	5,3 Mio. TEU Shortsea Land
7,8 Mio. TEU Transshipment (Feeder)	1,6 Mio. TEU Interlining Traffic

# BREXIT scenarios – effects on trucking

In case of a hard Brexit, including a delayed Brexit or a transition period for later implementation:

- Customs clearance required for imports and exports
- Significant problems in Dover:
  - a) Traffic back-ups up to 27km are expected at customs in Dover
  - b) No parking space for trucks
  - c) No sanitary facilities for drivers



This will lead to

1. Standstills of up to 3 days
2. Demurrage costs
3. Considerable scarcity of freight capacity to and from the UK, since vehicles will be stuck in waiting lines for clearance
4. Trucking firms not located in the UK will not be willing to drive there

# European Union (EU)

The European Commission defined the political framework and its vision for the future of the European transportation system in the current white paper Transport 2010 – 2020.

## Conclusion:

**30% of long-haul (over 300 km) freight transport by road is to be shifted to other modes of transport such as rail and ships by 2030, over 50% by 2050!**

- European elections on May 26, 2019
- New white paper on transportation 2020 / 2021
- ESN begins developing suggested strategies for the next white paper on transportation



*European Shortsea Network*

### The following ECAs have been set up:

- Baltic Sea (since May 2006 for SO<sub>x</sub>; beginning January 2021 for NO<sub>x</sub>)
- North Sea, including the Channel (since November 2007 for SO<sub>x</sub>; beginning January 2021 for NO<sub>x</sub>)

Ships trading in designated emission control areas have to use on-board fuel oil with a sulphur content of no more than 0.10% since 1 January 2015, as opposed to the limit of 1.00% in effect up until 31 December 2014.

On the short term leads to :

Increased use of MGO, scrubbers, hybrid technology, Flettner rotors, etc.

In the mean time, LNG is increasingly becoming established as an alternative fuel.

## Environment and Climate (IMO Regulations)

Shortsea shipping plays a pioneering role. Global shipping will profit from it, since all new technological advances are generally implemented in shortsea shipping first.

### New:

As of 1 January 2020, the limit for sulphur in fuel oil used on board ships operating outside designated emission control areas will be reduced to 0.50% m/m (mass by mass). This will significantly reduce the amount of sulphur oxides emanating from ships and should have major health and environmental benefits for the world, particularly for populations living close to ports and coasts.

Shipping is still the most environmentally friendly mode of transport!

ShortSeaShipping plays a leading role!



# Contact.

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