BALTIC RO-RO & FERRY YEARBOOK 2014/15
– steady as they go –

PREVIEW
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Dear Readers,

Last year we feared a revolution on the ro-ro & ferry market almost from the moment the Baltic Sea would become a part of the Sulphur Emission Control Areas, but nothing like that happened. No ground-breaking innovations, mergers, alliances, bankruptcies, and so forth. Neither did the first SECA-influenced months of 2015 change that much, partly due to the decreased oil prices, making it possible for shipping companies to take a few more breaths before the bunker price tag hits the ceiling once again. Phenomena reflected by this year’s figures and statistics have already been forecasted, even in our previous yearbooks – frozen investments, a reduced number of ships, and downgrading some services. The average GT fell by 250 units –1% and the average ship age increased from 19 to 20 years, which will become even older due to a lack of fleet replacements. The market, however, did not change significantly during the last 12 months or so and even more rolling cargo was carried.

More so, there hasn’t been any new player in the Top 10 ports table since the start of publishing the Baltic Ro-ro & Ferry Yearbooks. The ro-ro & ferry traffic at the moment goes through 71 ports within the borders of the BSR, while the Baltic is linked directly with at least 30 spots located in the rest of Europe. With approx. 109 single services – 63 ro-pax connections and 46 freight lines – the industry is steadily adapting to the harsher economic environment. The sooner the better, as the sulphur regulations have opened a new chapter and new experiences have to be gathered.

Thank you for your support in gathering the data and making this publication possible. We wish you a pleasurable and valuable read,

the Baltic Press Team
7 Project guidelines

11 Baltic ro-ro & ferry market
35 Baltic ro-ro & ferry timeline 2014/15
39 Shipping & rail networks
49 Maps of shipping operators
61 Maps of rail operators
69 Annexes
Ferry fleets’ review

At the time of closing this study (April 2015), there were 34 shipping operators in total sailing their ro-pax and ro-ro (including some con-ro) ships as well as also car carriers to, from and within the Baltic Sea on a regular basis. Altogether 21 companies offer lines served by car & passenger ferries (ro-pax for short), 10 use only pure freight (ro-ro) vessels and three – feeder car carriers. Only three operators feature both ro-ro and ro-pax lines, namely DFDS Seaways, Finnlines and Tallink.

Currently, there are approx. 109 single services, with 63 ro-pax connections and 46 freight lines (incl. nine feeder services by car-carriers). Regarding the main shipping operators, 11 services are provided by Finnlines (three ro-pax and eight ro-ro) and Stena Line (exclusively ro-pax), whilst DFDS operates nine services (four ro-pax and five ro-ro lines). In the case of the latter two, these aren’t their full networks, but services that dock in at least one Baltic port. The fourth in the chart, Tallink, has six services (five ro-pax, one ro-ro).

At present, the ro-ro & ferry traffic in question goes through 71 ports within the borders of the BSR, with more than half of them in Sweden, Denmark and Finland (23, 17 and 13 harbours, respectively). The Baltic is linked directly with at least 30 spots located in the rest of Europe (among others, 10 ports in Norway, eight in the UK).

<table>
<thead>
<tr>
<th>Year</th>
<th>Port</th>
<th>Country</th>
<th>Pax [thou.]</th>
<th>Pax [thou.]</th>
<th>Pax [thou.]</th>
<th>Yoy</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>Helsinki</td>
<td>FI</td>
<td>10,608</td>
<td>10,724</td>
<td>10,901</td>
<td>+1.7%</td>
</tr>
<tr>
<td>2013</td>
<td>Tallinn</td>
<td>EE</td>
<td>8,394</td>
<td>8,709</td>
<td>9,081</td>
<td>+4.3%</td>
</tr>
<tr>
<td>2014</td>
<td>Stockholm</td>
<td>SE</td>
<td>9,025</td>
<td>8,833</td>
<td>8,453</td>
<td>-4.3%</td>
</tr>
<tr>
<td>2012</td>
<td>Helsingborg</td>
<td>SE</td>
<td>7,841</td>
<td>7,763</td>
<td>7,656</td>
<td>-1.4%</td>
</tr>
<tr>
<td>2013</td>
<td>Helsingør</td>
<td>DK</td>
<td>7,824</td>
<td>7,721</td>
<td>7,635</td>
<td>-1.1%</td>
</tr>
<tr>
<td>2014</td>
<td>Puttgarden</td>
<td>DE</td>
<td>6,001</td>
<td>5,945</td>
<td>6,002</td>
<td>+1.0%</td>
</tr>
<tr>
<td>2012</td>
<td>Rødby</td>
<td>DK</td>
<td>6,001</td>
<td>5,945</td>
<td>6,002</td>
<td>+1.0%</td>
</tr>
<tr>
<td>2013</td>
<td>Turku</td>
<td>FI</td>
<td>3,312</td>
<td>3,423</td>
<td>3,257</td>
<td>-4.9%</td>
</tr>
<tr>
<td>2014</td>
<td>Mariehamn</td>
<td>FI</td>
<td>3,310</td>
<td>3,040</td>
<td>3,024</td>
<td>-0.5%</td>
</tr>
<tr>
<td>2012</td>
<td>Odden</td>
<td>DK</td>
<td>2,038</td>
<td>2,462</td>
<td>2,525</td>
<td>+2.6%</td>
</tr>
<tr>
<td>2013</td>
<td>Hirtshals</td>
<td>DK</td>
<td>2,245</td>
<td>2,344</td>
<td>2,476</td>
<td>+5.6%</td>
</tr>
<tr>
<td>2014</td>
<td>Rostock</td>
<td>DE</td>
<td>2,344</td>
<td>2,299</td>
<td>2,450</td>
<td>+6.6%</td>
</tr>
<tr>
<td>2012</td>
<td>Aarhus</td>
<td>DK</td>
<td>1,507</td>
<td>2,182</td>
<td>2,350</td>
<td>+7.7%</td>
</tr>
<tr>
<td>2013</td>
<td>Ystad</td>
<td>SE</td>
<td>1,962</td>
<td>1,934</td>
<td>1,953</td>
<td>+1.0%</td>
</tr>
<tr>
<td>2014</td>
<td>Frederikshavn</td>
<td>DK</td>
<td>1,711</td>
<td>1,718</td>
<td>1,741</td>
<td>+1.3%</td>
</tr>
<tr>
<td>2012</td>
<td>Gothenburg</td>
<td>SE</td>
<td>1,591</td>
<td>1,646</td>
<td>1,713</td>
<td>+4.1%</td>
</tr>
<tr>
<td>2013</td>
<td>Trelleborg</td>
<td>SE</td>
<td>1,538</td>
<td>1,618</td>
<td>1,681</td>
<td>+3.9%</td>
</tr>
<tr>
<td>2014</td>
<td>Visby</td>
<td>SE</td>
<td>1,590</td>
<td>1,583</td>
<td>1,630</td>
<td>+3.0%</td>
</tr>
<tr>
<td>2012</td>
<td>Kiel</td>
<td>DE</td>
<td>1,569</td>
<td>1,577</td>
<td>1,624</td>
<td>+3.0%</td>
</tr>
<tr>
<td>2013</td>
<td>Ranne</td>
<td>DK</td>
<td>1,467</td>
<td>1,440</td>
<td>1,469</td>
<td>+2.0%</td>
</tr>
<tr>
<td>2014</td>
<td>Nynäshamn</td>
<td>SE</td>
<td>1,408</td>
<td>1,385</td>
<td>1,430</td>
<td>+3.2%</td>
</tr>
<tr>
<td>2012</td>
<td>Gedser</td>
<td>DK</td>
<td>1,414</td>
<td>1,329</td>
<td>1,363</td>
<td>+2.6%</td>
</tr>
<tr>
<td>2013</td>
<td>Strömstad</td>
<td>SE</td>
<td>1,143</td>
<td>1,085</td>
<td>1,190</td>
<td>+9.7%</td>
</tr>
<tr>
<td>2014</td>
<td>Eckero</td>
<td>FI</td>
<td>890</td>
<td>911</td>
<td>912</td>
<td>+0.1%</td>
</tr>
<tr>
<td>2012</td>
<td>Grislehamn</td>
<td>SE</td>
<td>890</td>
<td>911</td>
<td>912</td>
<td>+0.1%</td>
</tr>
<tr>
<td>2013</td>
<td>Kapellskär</td>
<td>SE</td>
<td>930</td>
<td>867</td>
<td>911</td>
<td>+5.1%</td>
</tr>
<tr>
<td>2014</td>
<td>Copenhagen</td>
<td>DK</td>
<td>735</td>
<td>744</td>
<td>727</td>
<td>-2.3%</td>
</tr>
<tr>
<td>2012</td>
<td>Riga</td>
<td>LV</td>
<td>732</td>
<td>774</td>
<td>677</td>
<td>-12.5%</td>
</tr>
<tr>
<td>2013</td>
<td>Gdynia</td>
<td>PL</td>
<td>469</td>
<td>509</td>
<td>560</td>
<td>+10.0%</td>
</tr>
<tr>
<td>2014</td>
<td>Karlskrona</td>
<td>SE</td>
<td>469</td>
<td>509</td>
<td>560</td>
<td>+10.0%</td>
</tr>
</tbody>
</table>

Many sides of one coin

Phenomena reflected by figures and statistics have already been forecasted, even in our previous yearbooks. The generally frozen investments (excluding adjusting to the SECA requirements), reduced the number of ships, downgraded some services by declining the number of calls or by ceasing passenger traffic, etc. – was expected as a result of the industry’s adaptation to the harsher economic environment. Such processes combined with the growing mass of rolling cargo resulted in raised productivity of vessels’ cargo space. This in turn, as we expected, has already had and will further mitigate an increase in freight prices. Spectacular growth in competition on three Baltic routes (Świnoujście-Ystad, Sandefjord-Strömstad, Hirtshals-Langesund), brought by TT-Line and Fjord Line, should have the same impact on prices. Speaking of the latter company’s activities, we should mention that the only two ‘islands of development’ on the Baltic, that is, operators that developed their fleets a lot in terms of quantity and quality during 2012-14, is Fjord Line and Mols-Linien. Both companies brought significant growth in traffic not only for themselves but also to ports, especially if we compare the two-year period. Mols-Linien has the youngest fleet in the Baltic with an average age of eight years. Exactly the same factor would apply to Fjord Line, if we assessed its fleet without its HSCs. Nonetheless, no doubt, Fjord’s traditional ferries have the youngest interiors – their age has to be measured in months, namely 16, after refurbishment of its oldest vessel. But the success (we think we can use this word) of operators, shippers and ports has its dark side too – a lack of orders in Baltic shipyards and a reduced market for local shipowning companies. Will most of the future demand for new tonnage set sail to the Far East or will it feed closer industries? Will Åland’s cluster of shipowners specialised in ro-ro ships survive? The coming two years will bring such answers.

For a detailed Baltic ro-ro & ferry 2014/15 affairs chronicle, see also the 2/15 issue of the Baltic Transport Journal and its report section entitled A year of adaptation.
### Timeline 2014/15 – highlights

#### 2014

- **January** TT-Line enters Poland on the Świnoujście-Trelleborg ro-pax route  
- **January** Oxelösund added to SCA Logistics’ ro-ro network  
- **February** DB Schenker expands its North Rail Express  
- **February** Kombiverkehr’s new kombi connection Kiel-Duisburg  
- **February** Scandlines buys back the Berlin and Copenhagen ferries  
- **February** Carrier takes over Årsta Kombiterminal  
- **February** New Stena Line-Frederikshavn port agreement  
- **March/April** Brand-new intermodal terminal in the Port of Karlskrona  
- **April** EML’s new Baltic-North Sea car/ro-ro link  
- **April** Black Sea Ferry under 100% ownership of RZD  
- **May** Destination Gotland to serve the island of Gotland for another decade  
- **June** Fjord Line receives the refurbished ferry Oslofjord and kicks-off its Sandefjord-Strömstad service  
- **June** DFDS’s new Lübeck/Travemünde-Klaipėda ro-ro service (closed in August due to the West-Russia economic war)  
- **June** TT-Line increases its new Świnoujście-Trelleborg from 12 to 20 weekly sailings  
- **September** More runs (altogether three) on Kombiverkehr’s Kiel-Verona rail route  
- **September** CLdN moves its ro-ro operations to Logent’s Gothenburg terminal  
- **September** Brand new kombi terminal at the Port of Esbjerg  
- **September** DFDS closes the 139-year old Esbjerg-Harwich ro-pax route  
- **October** Stena Line-Wasaline cooperation  
- **October** Stena Line’s Sweden-Latvia adjustments  
- **October** Two new ro-ro services of SOL Continent Line  
- **November** Stena Line and Mann Lines team up  
- **November** Reder AB Gotland (Destination Gotland) orders an LNG-powered ferry  
- **November** Another upgrade of ERS Railways’ Swarzędz-Rotterdam route (now eight weekly runs)

#### 2015

- **January** The Baltic Sea becomes a part of the 0.1% Sulphur Emission Control Areas  
- **January** Tallink adds cargo capacity (ro-ro vessel Sea Wind) to its Hel-Tal link  
- **January** Third vessel (Merchant) on SOL’s Hanko-Rostock route  
- **January** SOL’s new-old Gothenburg-Zeebrugge service  
- **January** EML with a new Baltic service (Tyne-Zeebrugge-Gothenburg-St. Petersbur-Hanko)  
- **January** Finnlines adds Hanko to its network  
- **January** Kombiverkehr and Hupac Intermodal launch the Malmö-Cologne-Eifeltor kombi service  
- **January** Coevorden/Bad Bentheim-Malmö kombi route of Kombiverkehr in place  
- **February** Scandlines and Stena sell the Helsingborg-Helsinki service  
- **February** New Lübeck-Trieste kombi route of European Cargo Logistics and CFL-Multimodal  
- **February** Tallink renews the cruise ferry Romantika  
- **February** Viking Grace gets a heat-to-electricity system  
- **February** Navintail bareboat charters a vessel from Finnlines  
- **March** Tallink’s EUR 230 mln dual-fuel LNG ferry – inked  
- **March** New Duisburg-Malmö kombi shuttle of Samskip Van Dieren Multimodal and Hector Rail  
- **March** Methanol-converted Stena Germanica leaves Gdansk  
- **April** Two ferries (Regina Baltica and Silja Festival) leave Tallink’s fleet  
- **April** Viking Line’s Mariella renovated by Oresund Drydocks Landskrona  
- **April** Initial Design of Wasaline’s brand-new hybrid dual-fuel ro-pax ferry completed
Maps of shipping operators

**SOL Continent Line**
- Rostock-Hanko (ro-ro)
- Kemi-Oulu-Lübeck/Travemünde (ro-ro)
- Kemi-Oulu-Lübeck/Travemünde-Antwerp-Zeebrugge-Tilbury (ro-ro)
- Gothenburg-Zeebrugge (ro-ro)

**Sea-Cargo**
- Amsterdam-Esbjerg (ro-ro)
  - Bergen
  - Haugesund
  - Stavanger/Tamanger
  - Esbjerg

**Black Sea Ferry**
- Ust-Luga-Sassnitz (ro-ro)
  - Ust-Luga
  - Balτysk/Kaliningrad

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Maps of rail operators (regular trailer/kombi trains)
7 Project guidelines
11 Baltic ro-ro & ferry market
35 Baltic ro-ro & ferry timeline 2014/15
39 Shipping & rail networks
49 Maps of shipping operators
61 Maps of rail operators

69 Annexes

70 Annex 1. Fleet of the Baltic ro-pax operators
72 Annex 2. Baltic ro-pax (ferry) services – lane performance
73 Annex 3. List of ro-pax vessels (ferries) of Baltic operators
77 Annex 4. Fleet and services of the Baltic pure ro-ro (freight) operators
78 Annex 5. Baltic pure ro-ro (freight) services – lane performance
80 Annex 6. List of vessels of the Baltic pure ro-ro (freight) operators
(all volumes excl. tara)
Baltic Ro-ro & Ferry Yearbook 2014/15 highlights:

- Up-to-date no SECA-caused turmoil
- Ageing fleet, no major fleet renewals
- Fairly stable port volumes and shipping networks
- Hard times for Baltic ro-ro ship chartering companies

Check the regularly updated network at: www.baltictransportmaps.com