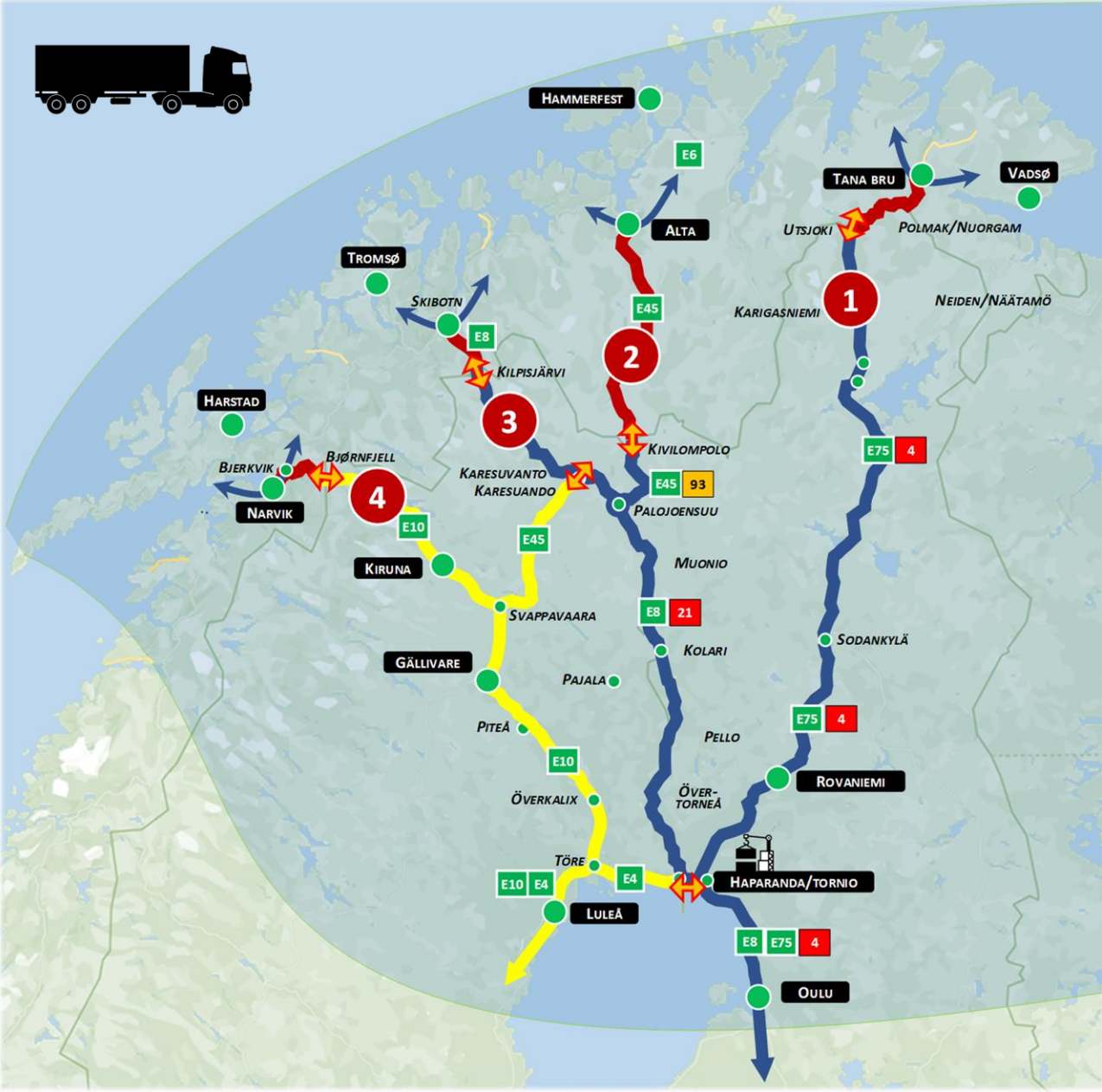
New North project -WP1
Seamless freight transport for the future

MARKET REPORT

Project steering group meeting
Narvik, Scandic, April 9. 2025

By Stig Nerdal, Managing Director,
Transportutvikling AS



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PRESENTATION OUTLINE

1. **AMBITIONS AND METHOD**
2. **CORRIDORS AND BORDER CROSSINGS**
3. **INDUSTRIES AND A FEW EXAMPLES**
   - EXAMPLES FROM SEAFOOD AND GROCERY
4. **NEXT STEPS**

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AMBITIONS – MARKET REPORT – NORWEGIAN FOCUS

- ***From Coast to market*** *(information/knowledge base for transports after to the Norwegian border crossings)*

- *focus on* ***selected road transport corridors*** *and* ***selected industries***

- *present the information as* ***detailed as possible****.*

- *Try to find* ***comparable*** *AADT-figures for the heaviest vehicles along the* ***selected corridors***

- *indicate the* ***industries shares*** *of the total AADT*

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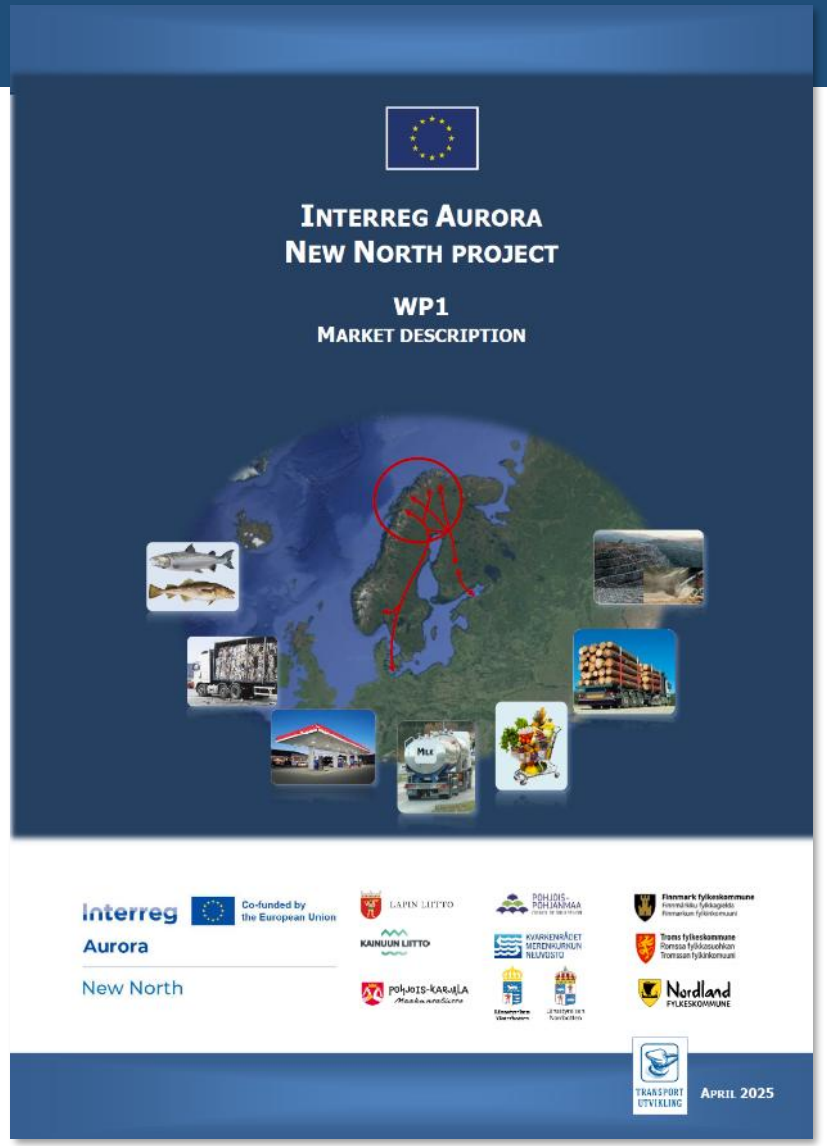
REPORT STRUCTURE – 8 MAIN CHAPTERS

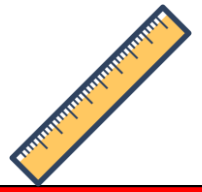
1. *HIGHLIGHTS FROM THE REPORT*
2. *THE PROJECT AND PROJECT AMBITIONS*
3. *BRIEF REGIONAL DESCRIPTION*
4. *WP1 METHOD AND PROJECT WORK*
5. **TRANSPORT CORRIDORS AND BORDER CROSSINGS**
6. **THE INDUSTRIES (7 INDUSTRIES)**
7. **FREIGHT FLOW ALONG THE CORRIDORS**
8. *APPENDICES*



METHOD AND DATA COLLECTION

- **Primary information (interviews)**
  - more than 100 companies
- **Secondary (road traffic) information:**
  - Statens Vegvesen (Norway)
  - Trafikverket (Sweden)
  - Vayla/Digitraffic (Finland)

"Try to find comparable AADT-figures for the heaviest vehicles"



Norway	Sweden	Finland
Published by: Lenght	**Published by: Weight**	**Published by: Vehicle category**
• <5,6 m	• Leight vehicles (lätta)	1. Passenger car or van
• >= 5,6 m	• Heavy (tunga)	2. Truck without trailer
• 5,6 m – 7,6 m	- Medium heavy (medeltunga)	3. Buses and coaches
• 7,6 m – 12,5 m	- Very heavy (mycket tunga)	4. Truck and semi-trailer
• 12,5 m – 16,0 m		5. Truck and trailer
• >= 16,0 m		6. Passenger car and trailer
• 16,0 m – 24,0 m		7. Passenger car and caravan
• >=24,0 m		8. MC
		9. High-Capacity Truck (>76 tons)
Detection system		
Means of inductive loops/sensors in the road surface	*Hose sensors in the road surface*	*Electromagnetic induction loops embedded in the roads*

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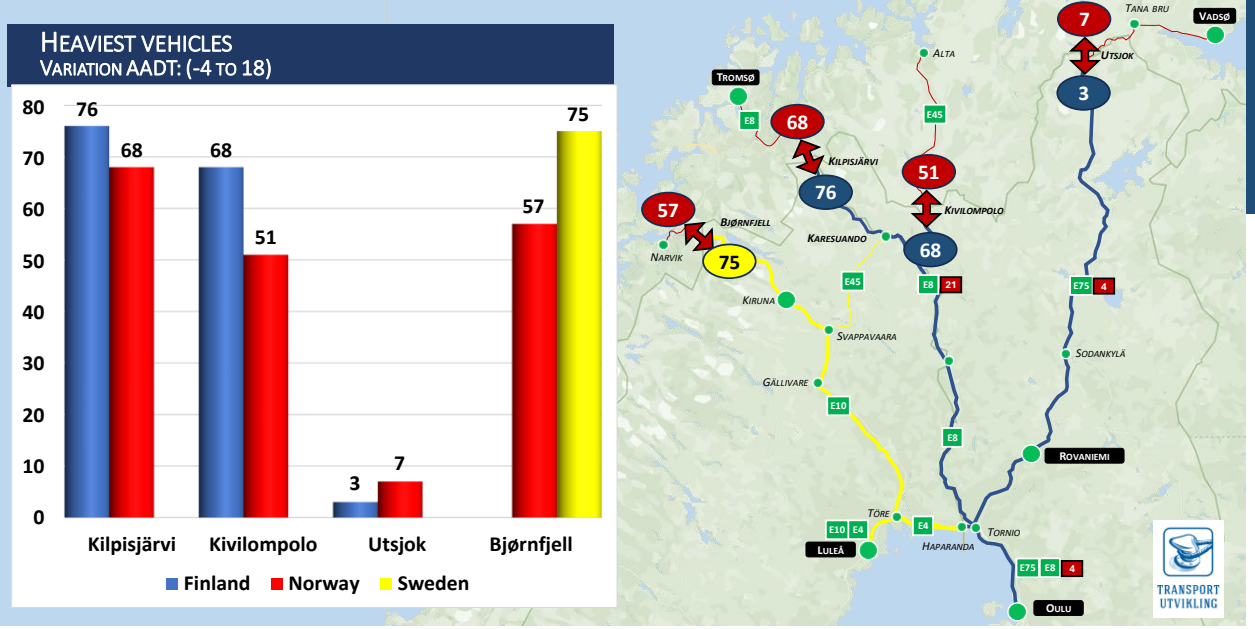
Different classifications create some challenges

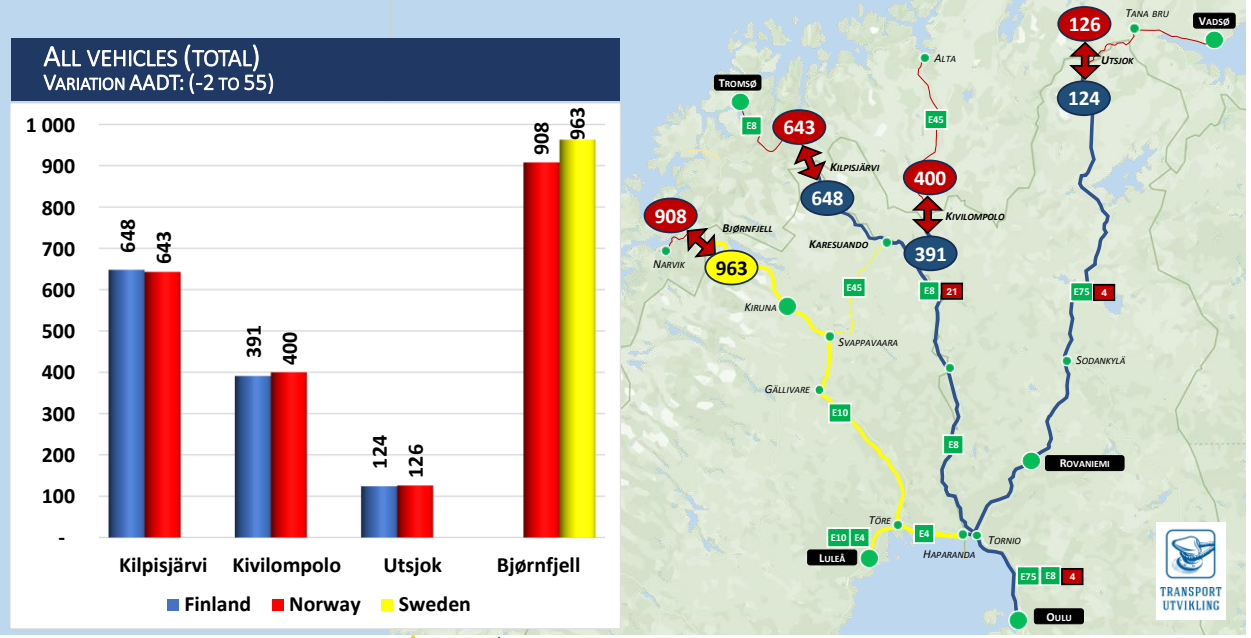
The countries do not use the same classifications for the heaviest vehicles.

- **Heaviest vehicles**: relatively large differences



Regardless of classification, the total AADT numbers should be the same.

- **All vehicles**: Smaller differences



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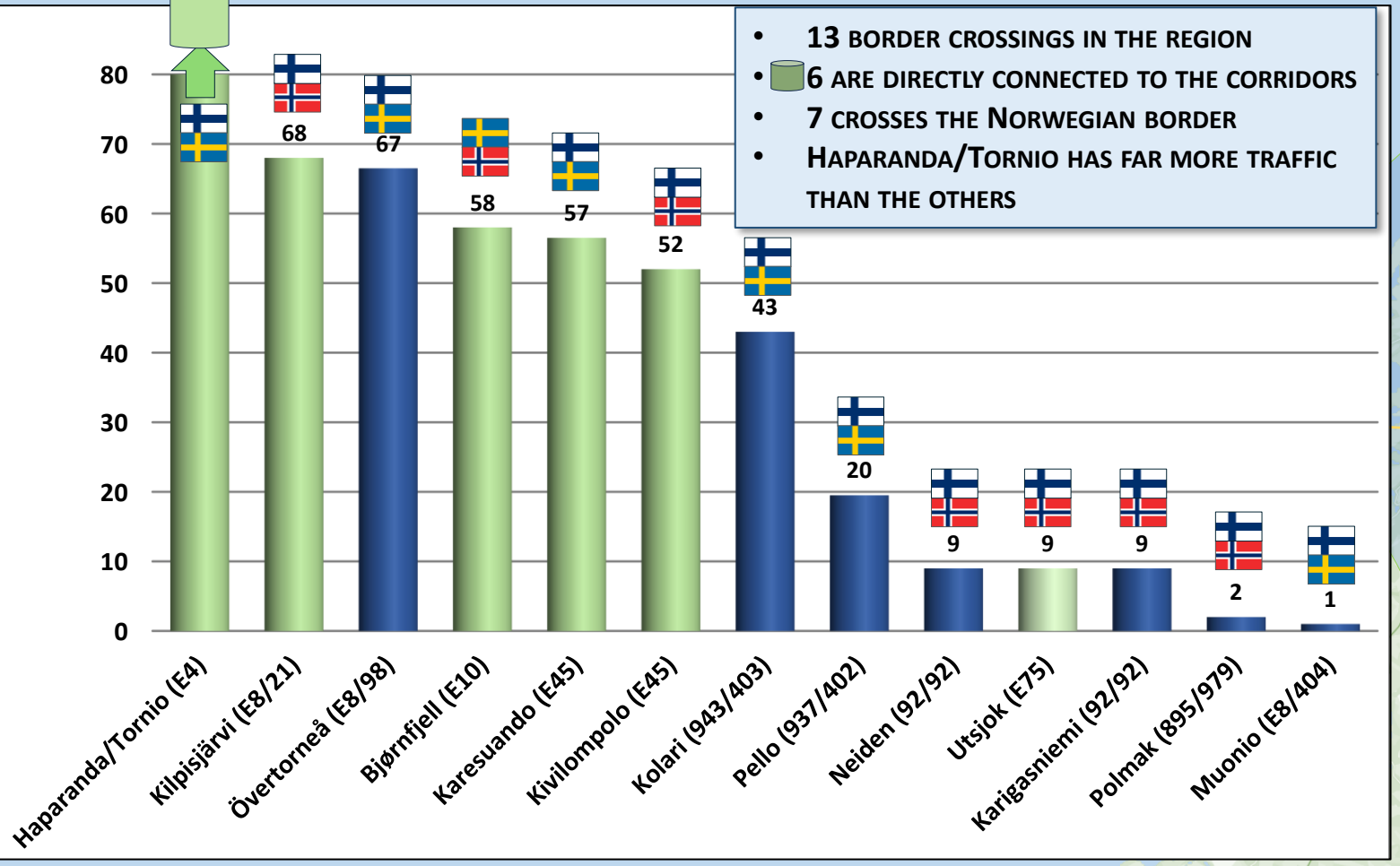
THE CORRIDORS AND BORDER CROSSINGS

- 13 BORDER CROSSINGS IN THE REGION
- 6 ARE DIRECTLY CONNECTED TO THE CORRIDORS
- 7 CROSSES THE NORWEGIAN BORDER
- HAPARANDA/TORNIO HAS FAR MORE TRAFFIC THAN THE OTHERS



TRANSPORT UTVIKLING

UTSJOK 1

KIVLOMPOLO 2

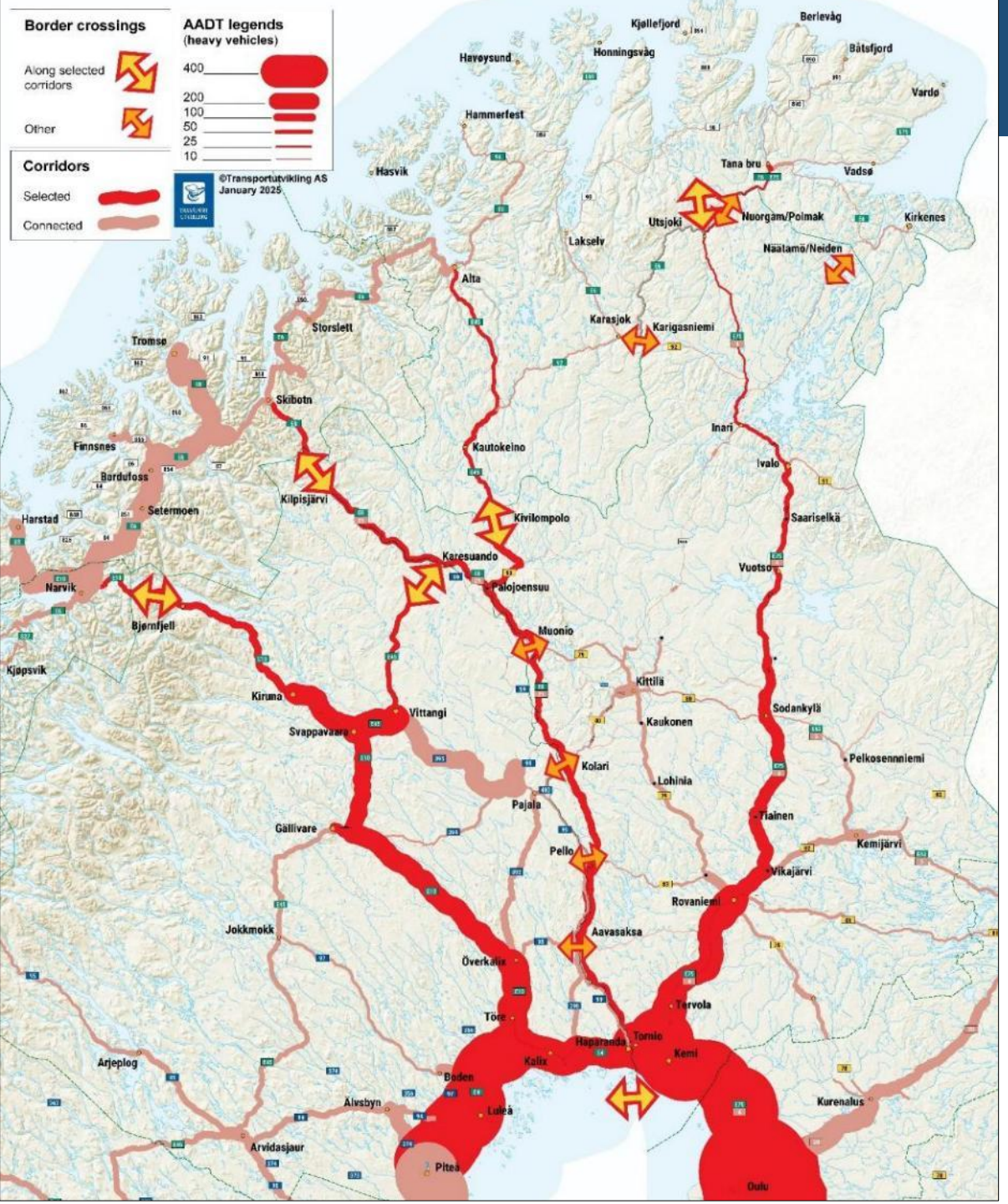
KILPISJÄRVI 3

BJØRNFJELL 4

KARESUANDO

HAPARANDA/TORN

THE OVERALL FREIGHT FLOW MAP

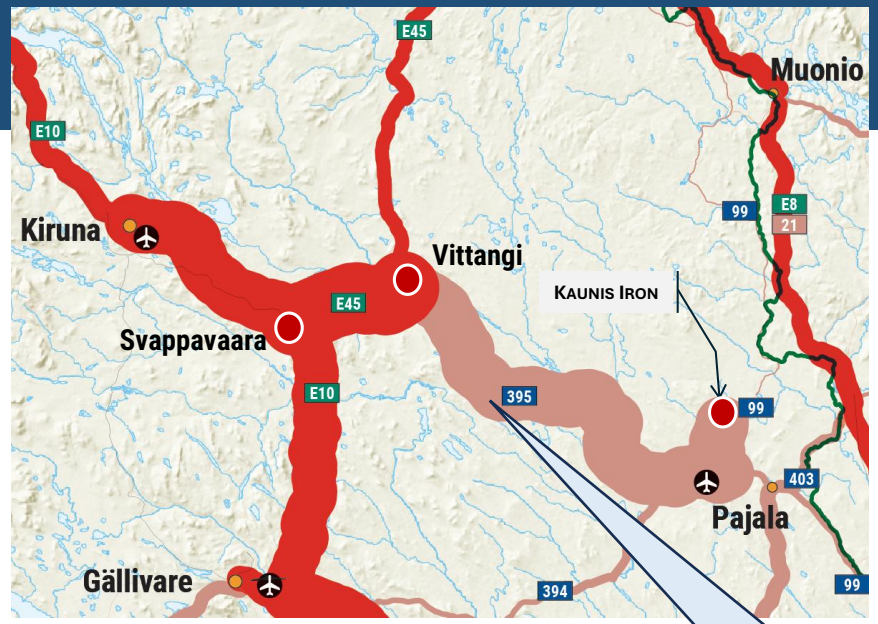


INCREASING ROAD TRANSPORT VOLUMES WHEN MOVING SOUTH

- ✓ HIGHER POPULATIONS
- ✓ MORE EXTENSIVE BUSINESS ACTIVITY
- ✓ ACCUMULATION OF VOLUMES FROM/TO THE NORTH

BUT ALL CORRIDORS, FROM NORTH TO SOUTH, ARE REGIONALLY IMPORTANT

Higher AADT on some route-sections -due to multimodal transports and large companies

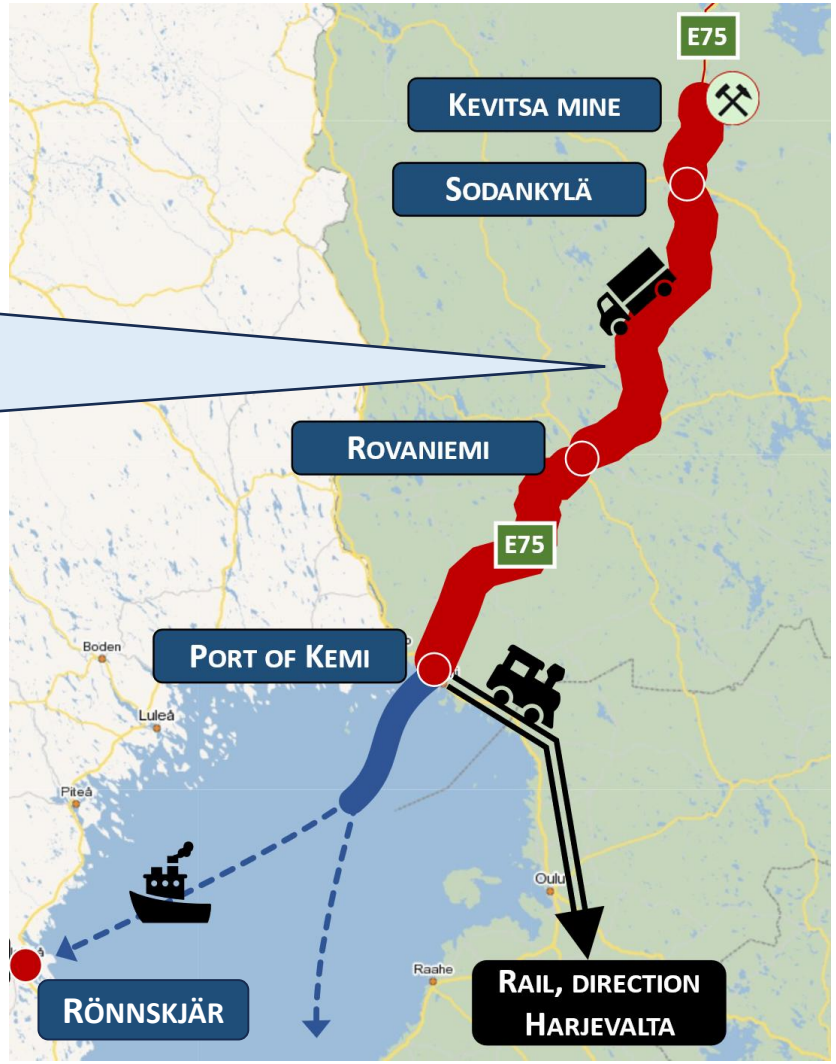


Boliden Kevista:

- Truck from Sonadkylä to the port of Kemi (E75/4)
- Sea or rail to Harjevalta

Kaunis Iron:

- Pajala to Svappavaara (99, 395 and E45)
- rail transport to the port of Narvik.



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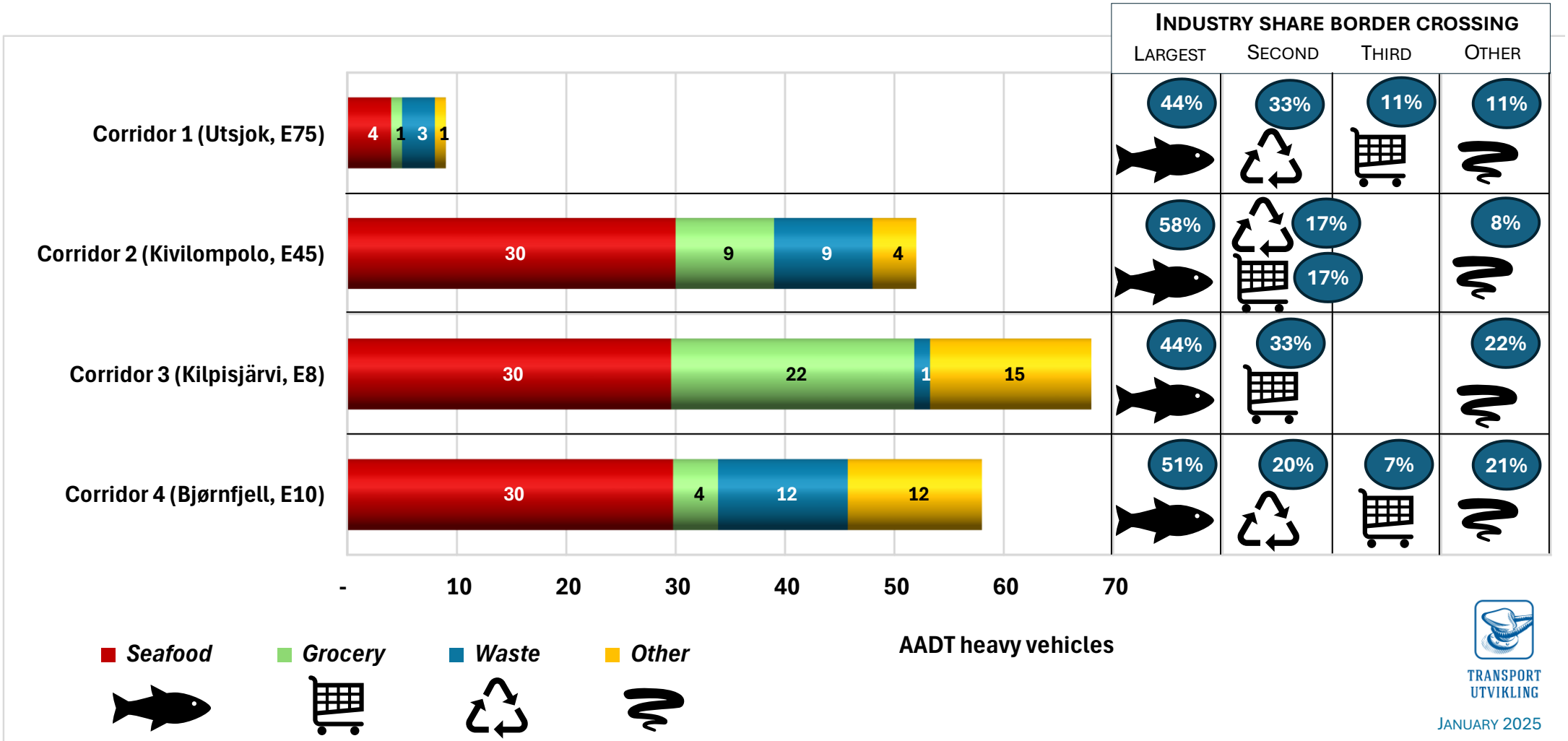
INDICATION OF INDUSTRY SHARES (CHAPTER 6.2)



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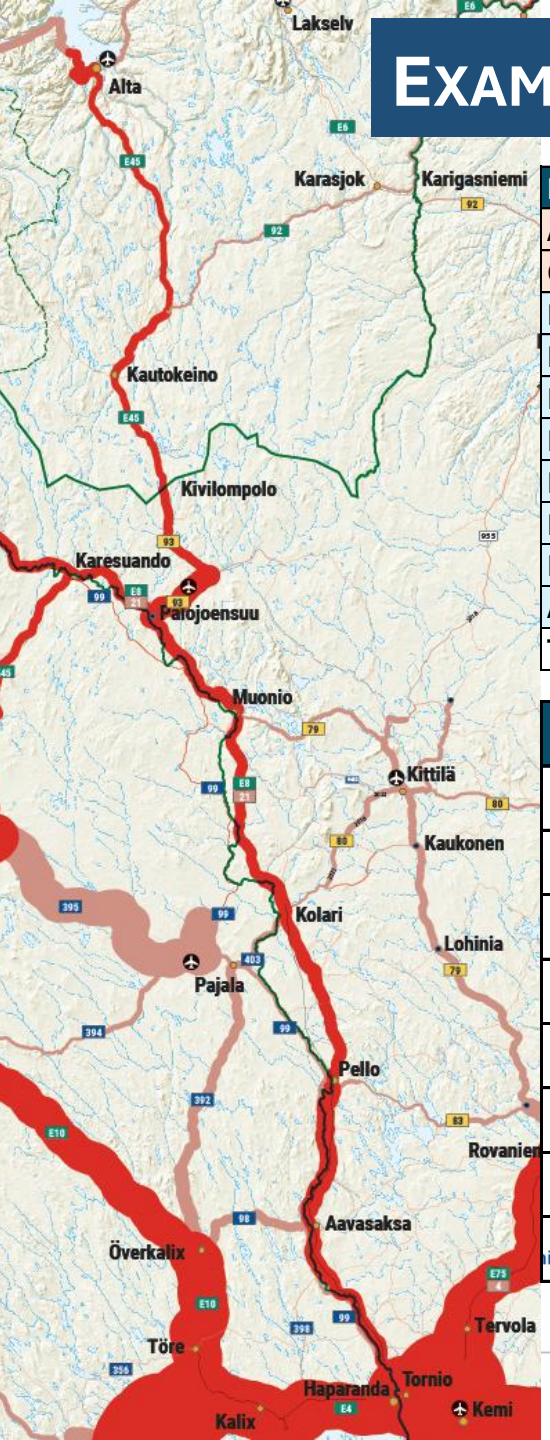
Example Corridor 2 – Alta-Kivilompolo-Keminmaa

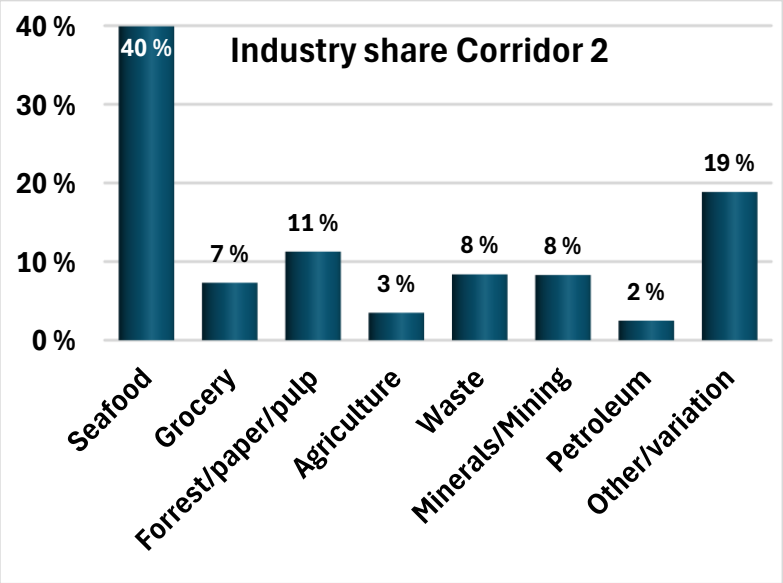


Route section	Road no.	Country	Distance	AADT
Alta-Gievdneguoika	E45	Nor	100	48
Gievdneguoika-Kivilompolo	E45	Nor	76	64
Kivilompolo border	E45	Nor/Fin	0	52
Kivilompolo-Hetta	E45	Fin	37	67
Hetta-Palejoensuu	E45	Fin	28	75
Palejoensuu-Munio	E8	Fin	49	91
Mounio-Kolari	E8	Fin	77	76
Kolari-Pello	E8	Fin	69	87
Pello-Aavasaksa	E8	Fin	49	126
Aavasaksa-Tornio	E8	Fin	69	87
Total			**554**	**77**

Route sections, road numbers, distance and AADT

Industry share (km. weighted average)

Industry share	%
Seafood	40 %
Grocery	7 %
Forrest/paper/pulp	11 %
Agriculture	3 %
Waste	8 %
Minerals/Mining	8 %
Petroleum	2 %
Other/variation	19 %



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7 INDUSTRIES

DESCRIPTION IN THE REPORT (ALL INDUSTRIES):

- SHORT PRESENTATION (FOCUS ON ROAD TRANSPORT)
- LOCATION OF MAIN PLAYERS
- EXAMPLES: TRANSPORT ROUTES AND VOLUMES

Transport intensive industries	Norway	Sweden	Finland
Seafood			
Minerals and mining			
Agriculture			
Waste			
Grocery			
Petroleum products			
Forestry, paper and pulp			
Other			

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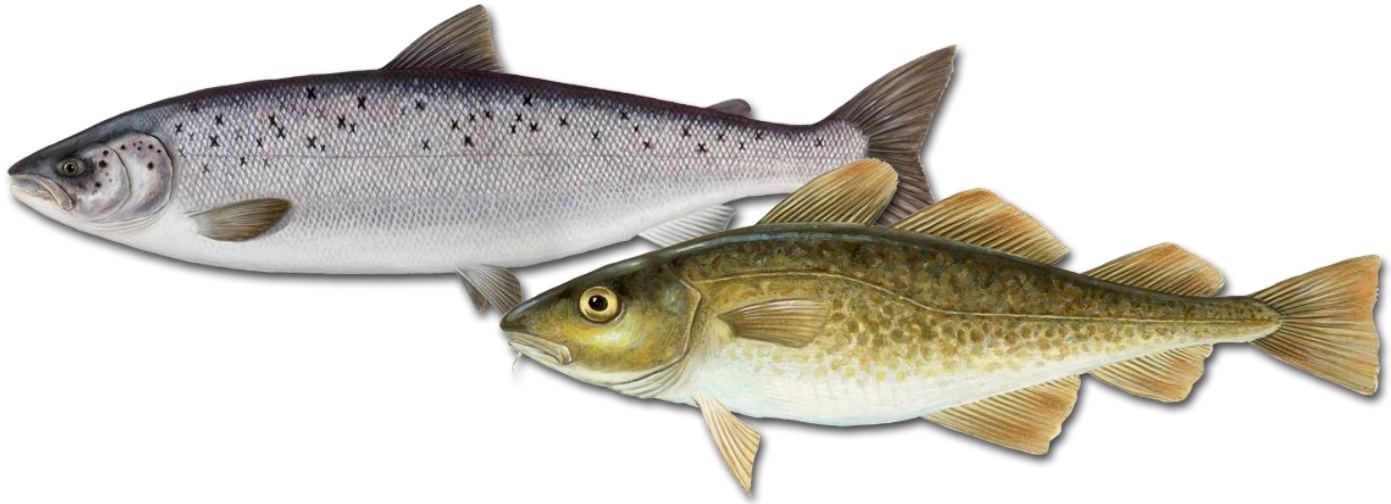
EXAMPLES: SEAFOOD AND GROCERY



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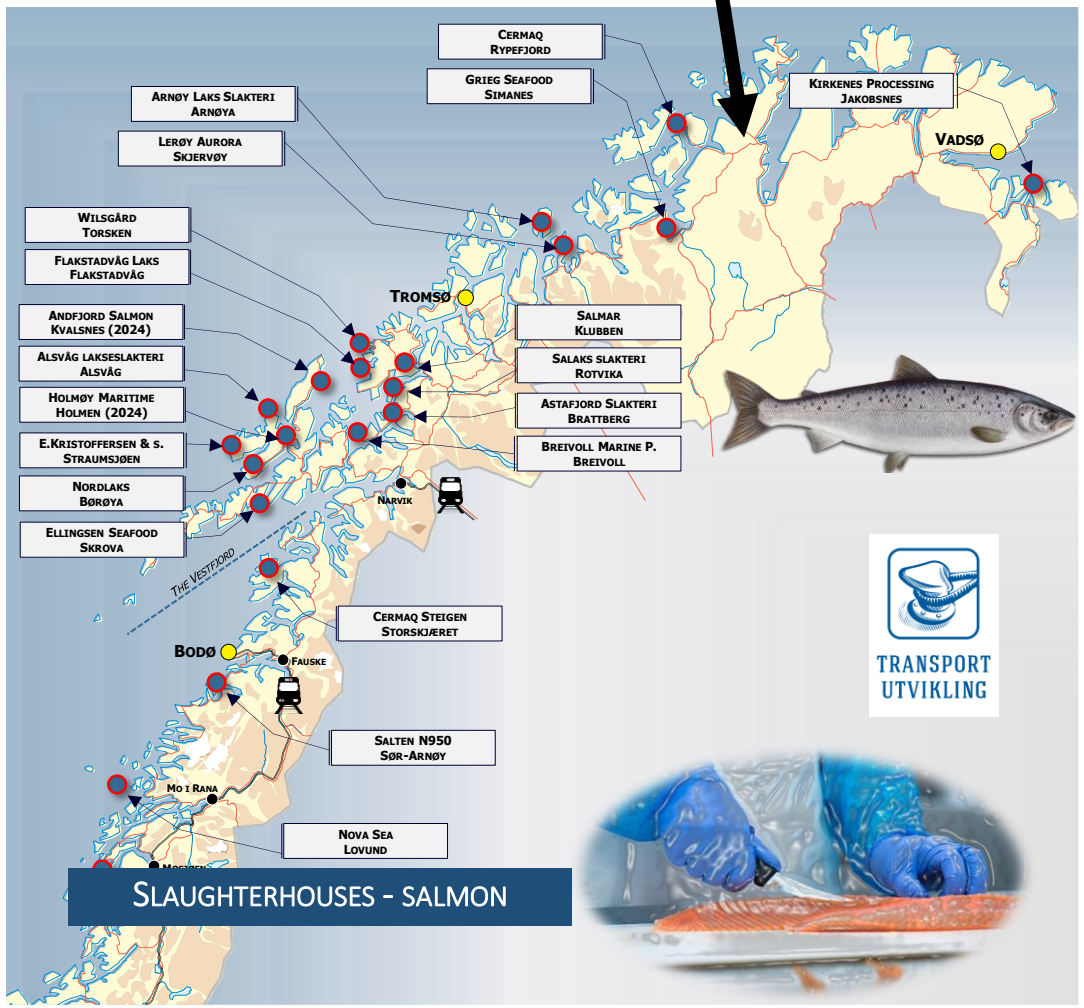
SEAFOOD

LOCATION OF THE LARGEST WILD CATCH RECEIVERS IN NORTHERN NORWAY

NORWEGIAN WP1 REGION
160 WILD CATCH RECEIVERS
(60% / 570.000 T.)

NORWEGIAN WP1 REGION
17 SLAUGHTERHOUSES/SALMON
(40% / 340.000 T.)



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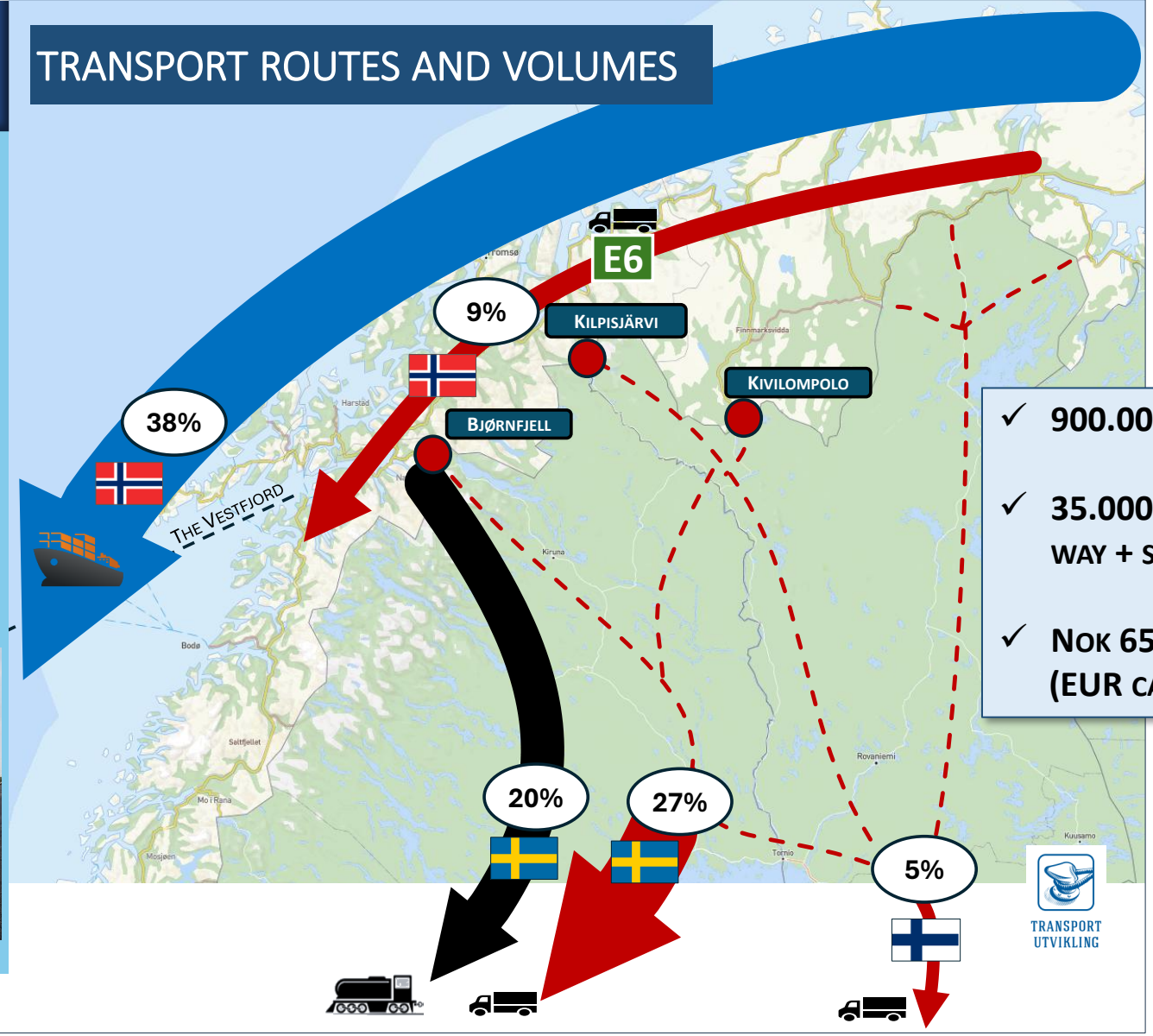
Norwegian Seafood Export (tons) 2023
North of Vestfjorden

- 38% (>350.000 ton by sea)
- 20% (<200.000 ton med train/Narvik)
- 27% (>250.000 ton through Sweden)
- 9% (>85.000 ton, national along E6)
- 5% (<50.000 ton to/via Finland)

Largest border crossing station in 2023:

- E8 Kilpisjärvi
- E45 Kivilompolo
- E10 Bjørnfjell

Transport routes and volumes



- ✓ 900.000 t.+
- ✓ 35.000 trucks p.y. one way + sea transports
- ✓ Nok 65 bill. (EUR ca. 6,5 bill.)

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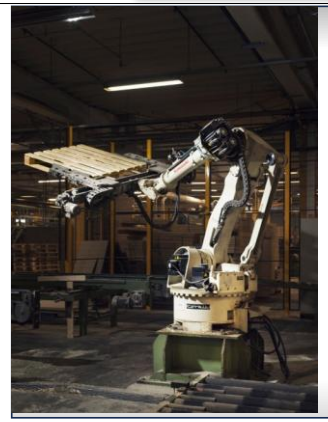
Most seafood exports, by road/rail, goes through Sweden
Some volumes to Eastern markets to/through Finland

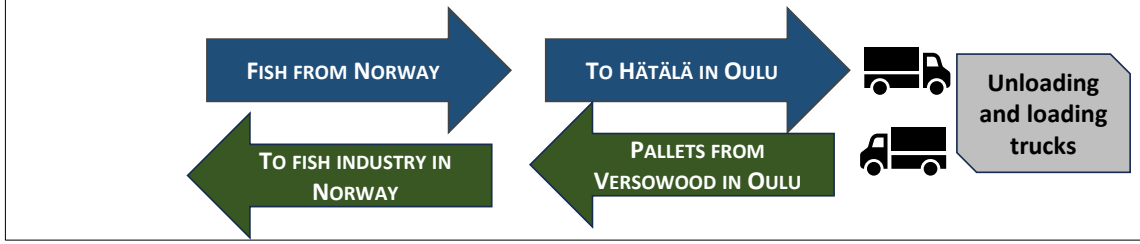
Trucks often pass through Finland

Balanced flow Norway-Oulu-Norway

"Hätälä's fish comes from the world's purest arctic waters. The salmon's journey from Norway to our factory takes only 8–12 hours. This is why the salmon we use is always very fresh."



"Versowood is Finland's largest private sawn timber producer… We manufacture over 5 million loading pallets. The Haukiputaa factory is the most northern pallet factory in Finland; from there we transport all of our Norway-bound loading pallets."



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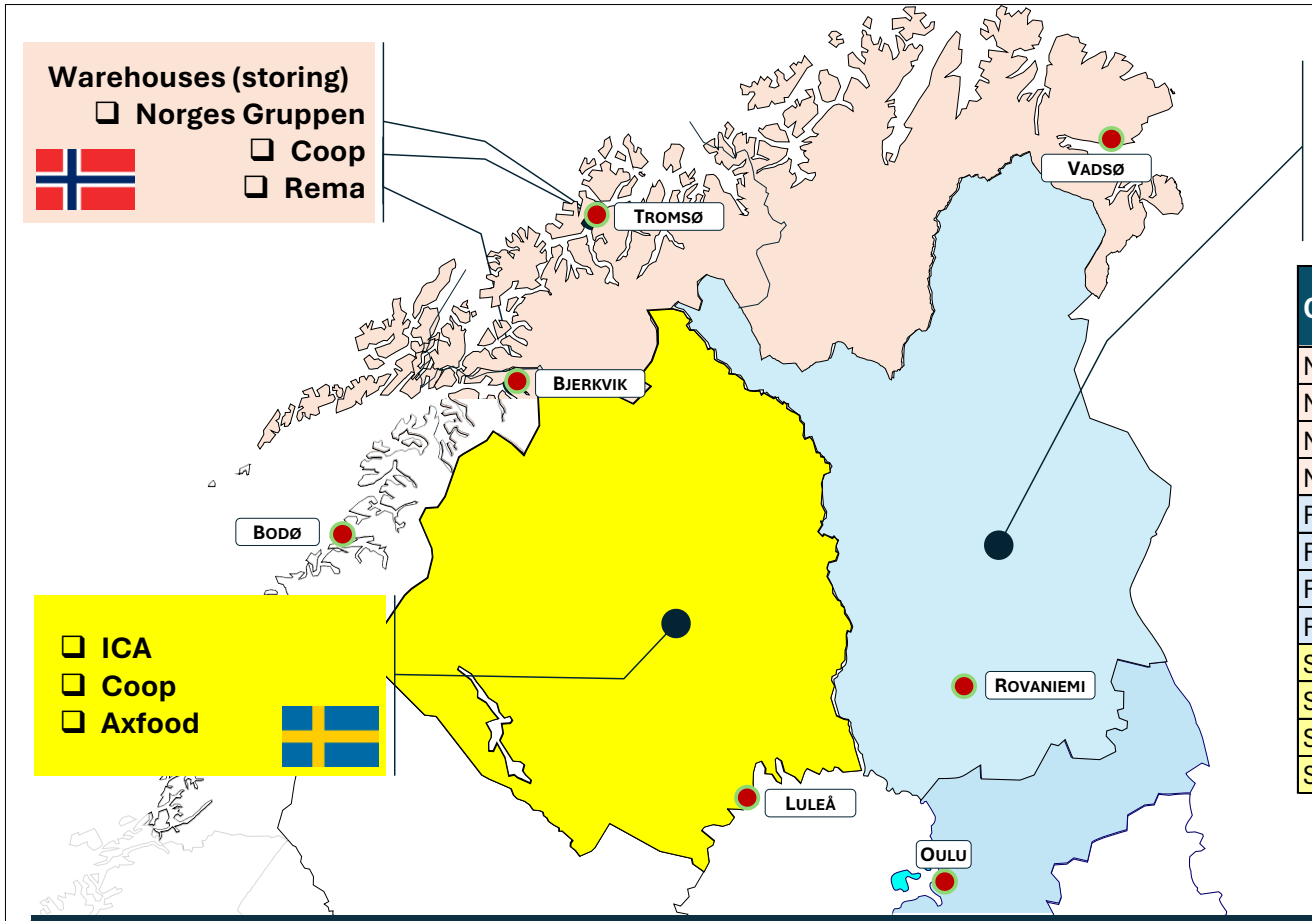
GROCERY



Country	Wholesaler	National market share
Norway	REMA	24 %
Norway	Coop	30 %
Norway	Norgesgruppen/ASKO	44 %
Norway	Bunnpris/other	3 %
Finland	S-Group (SOK)	48 %
Finland	Kesko	34 %
Finland	Lidl	10 %
Finland	Other	8 %
Sweden	ICA	50 %
Sweden	COOP og Netto	18 %
Sweden	Axfood (Willys, Hemköp)	21 %
Sweden	Lidl and other	12 %

MAIN GROCERY COMPANIES – WP1 AREA

ILLUSTRATION: TRANSPORTUTVIKLING AS

TRANSPORT UTVIKLING

ALL COUNTRIES:

- ✓ 500 RETAILERS
- ✓ THE MARKET IS CONTROLLED BY A FEW LARGE PLAYERS
- ✓ SIGNIFICANT ROAD TRANSPORT

DIFFERENT DISTRIBUTION STRUCTURES

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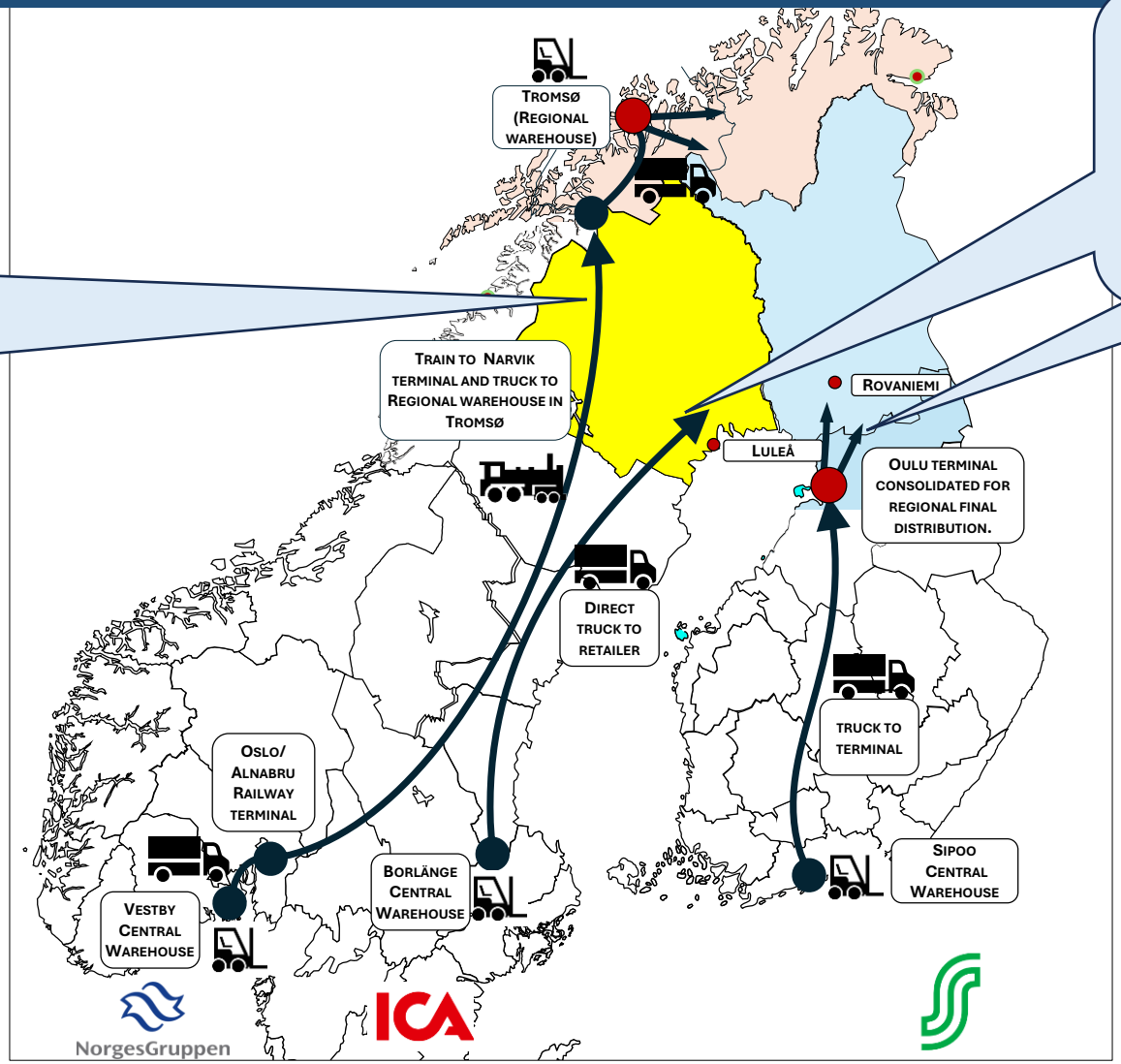
Grocery – different distribution structures

Norway:
Usually train/truck-truck to **Regional warehouses**, and truck distribution to retailers

Sweden/Finland:
Usually **direct transports from national warehouses**, or reloading terminals



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THE MARKET REPORT WILL BE USED FOR THE NEXT STEPS

It is an ambition that the final project will be a knowledge base when working on improving cross-border transports in the North-Nordic region

This first report forms the basis for the projects next phases.

- Identify various **bottlenecks** for freight transports along the selected corridors
- Suggestions for **improvement**
- Further work may also include a verification of different procedures for registration of transport statistics

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THANK YOU FOR YOUR ATTENTION