



ECSCA

European Community Shipowners' Associations

## On-line survey for ship operators

- Real-time information about economic impact
- From operators wholly / partly active in European SECAs
- **Second Round:** February 2015 (active until 9 March morning)
- Survey link: <http://svy.mk/17iJu5x>

Four main sections:

- Information company, incl. trades and routes covered
- Compliance methods chosen / problems encountered
- Economic impact: freight rates, behaviour customers, level of service (frequency / number of vessels)
- Experiences on Enforcement of the Sulphur Directive



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## Preliminary results survey (1)

- 31 shipping companies completed the survey so far
- 38,7% liner/48,4% tramp/12,9% other
- Majority of respondents (67,8 %) operate 0-20 ships
- Proportion of company's ships operated in the European SECAs in the period 01/01/2015 - 15/02/2015:
  - For liner 0-50% or 100%
  - For tramp 0-25%
- Switch to low sulphur fuel (29 respondents)
- 5 installed scrubbers (mostly Hybrid system)
- 3 use LNG (mostly for new builds)
- 0 use Methanol



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## Preliminary results survey (2)

- 54,8% respondents increased freight rates
- Influence of Company's freight rates or customers' behavior due to MGO/MDO price: 70.6% (yes), 17.6% (no), 11.8% (not sure)
- 0-15% volume lost
- Calculation of loss of freight customers difficult on 1,5 month basis - uncertainly whether there will be a modal shift
- Impact on level of service (frequency, number of vessels deployed): generally too early to estimate
- The drop in fuel prices has helped to limited the negative impact.
- Inspections already in Finland, Sweden, UK but generally too early to share experiences on enforcement.
- Accidental non-compliant cases already taken place, mostly because of bunkering contamination