



IMPACT OF COVID-19 ON THE MARITIME SECTOR IN THE EU



Partially funded by the
European Union - European
Maritime and Fisheries Fund





TABLE OF CONTENTS

1. Introduction	4
2. Traffic: initial disruption and normalization	4
3. Global maritime industry	6
4. Maritime Trade Impact in the EU: Significant impact initially, commodity and geographical complexities, strong recovery	6
5. Freight Rate Impact: Significant volatility, with periods of “disruption upside” for freight costs & vessel earnings	9
6. Covid-19 Impact on EU-MS flag & ownership: Long term trends continue	10
7. Shipbuilding Impact: EU Focus on Cruise leads to material disruption	12
8. Cruise & Passenger: Deep Cruise Impact & Financial Stress, deep ferry impact but moderate recovery	14
9. Safety and environmental inspections	15



1. INTRODUCTION

The unprecedented escalation of COVID-19 and its global outbreak was followed by national lockdowns and strict travel restrictions. Consequently shipping, as a global industry, was severely impacted by COVID-19 in all areas, such as maritime traffic, trade, etc. Several sectors, from passenger ships to container ships and oil tankers, were also affected.

The coronavirus pandemic is an ongoing situation that is evolving day by day. What shipping will look like post COVID-19 is not yet known, but the pandemic could have a deep and long-term impact. However, the European Maritime Safety Agency (EMSA) has the necessary information and tools to compare data from the years before COVID-19 (2016-2019) with 2020 in the areas of maritime traffic, safety and pollution of the marine environment. With the support of an external contractor (tender EMSA/NEG/29/2020, awarded to Clarksons Research) information on trade volumes and type, cargo freight, and other financial indexes and indicators related to shipping (and consequently the financial impact on the EU maritime transport sector as a whole) was obtained.

As a result, data related to the impact of the pandemic on shipping were gathered. The data may be used by policy makers as a supporting tool in defining recovery measures. The report reflects the EU-28, considering that until the end of 2020, the UK was still a member of the EU.

If not specified, data provided in figures and tables have been obtained by EMSA's own systems. Traffic data have been obtained mainly from the Union Maritime Information and Exchange System (SafeSeaNet¹), and in certain cases have been combined with LRIT² and MARINFO³ data. Information on the impact of the pandemic on port calls in EU ports has already been made available on the EMSA website since July 2020.

A fleet analysis of the ships flagged in the EU-28 and whose owners were based in the EU Member States was carried out using the proprietary fleet database of Clarksons Research. The same database has also been used for trade and freight information, shipbuilding, repairs and part of the cruise industry activities.

2. TRAFFIC: INITIAL DISRUPTION

AND NORMALIZATION

With international transport at the forefront of trade, and dependent on travel and human interaction, the shipping industry has been impacted both directly and indirectly by the COVID-19 outbreak.

The period between 2016 and 2019 was rather stable with few variations. However, in 2020, the number of ship calls in the first quarter of the year was similar to the figures from 2019, but a significant decrease was recorded in the second quarter of the year (26.5%). The second quarter started shortly after the World Health Organization (WHO) declared the COVID-19 outbreak to be a pandemic (12 March 2020). In the third quarter of 2020 a decrease of 9.1% in comparison with 2019 was detected, but the fourth quarter of 2020 was very similar to 2019 (1.1% decrease).



1 Directive 2002/59/EC on Vessel Traffic Monitoring

2 Long Range Identification and Tracking system

3 EMSA database (fed by information bought from commercial providers)

By looking at the number of ship calls per ship type, a decrease in the number of ship calls between year 2019 and 2020 was found for all ship types. The cruise ships, passenger ships and vehicle carriers are the ship types for which the highest decrease in ship traffic was detected in 2020, with drops of 85.8%, 39% and 22.1% respectively. Meanwhile, the number of ship calls for bulk carriers, chemical tankers, container ships, general cargo vessels, liquified gas tankers, oil tankers, ropax and ro-ro cargo ships saw only a small decrease (up to 5%).

Croatia, France, Iceland and Spain experienced a decrease in the number of ship calls of more than 20% between 2019 and 2020, making them the most affected countries. This decrease in number of ship calls between 2019 and 2020 is attributed to the cruise and passenger coastal ship traffic which has been heavily affected by the crisis.

NUMBER OF SHIP CALLS REPORTED TO SAFESEANET

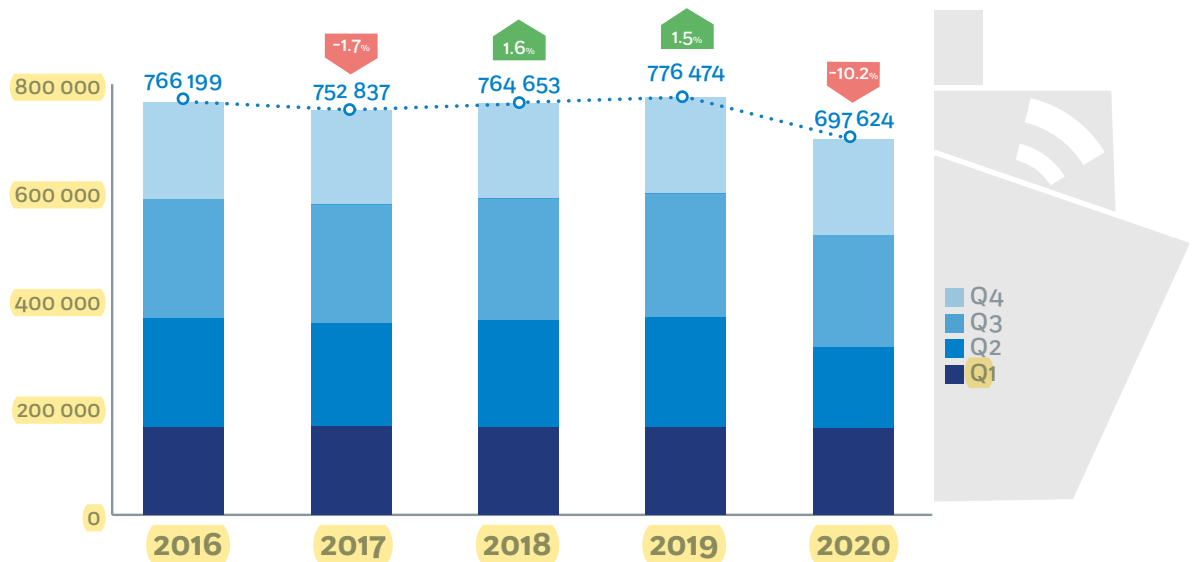


Figure 1: Number of ship calls reported to SSN between 2016 and 2020 per year quarter.

The total number of calls made by vessels flying the flags of EU Member States increased each year between 2016 and 2019. However, in 2020, the total calls figure dropped by 3.5% in comparison to 2019, with the related overall gross tonnage dropping by 11.1%. A significant decrease started in the second quarter of 2020, as an impact of the COVID-19 outbreak escalation across Europe that obliged many EU Member States to put in place lockdown measures.

In the third and fourth quarter of 2020, however, this trend appeared more stable, alternating between slightly negative (e.g. in Q3) and positive (e.g. in Q4) variations in comparison to the same periods in 2019. Major variations in 2020, compared with equivalent periods in 2019, can be observed for cruise and vehicle carriers.

The cruise sector and in general the transport of passengers were the sectors most heavily impacted by the COVID-19. Other sectors were also impacted, but in general, the trade did not stop. There was an initially dramatic dip in the first half of 2020, but thereafter the situation gradually improved. It is safe to say that, besides cruise ships, nowadays shipping is back to normal. Despite the major difficulties shipping had to face, commercial ship operations, ports and other maritime transport sectors continued to operate – confirming the resilience of the industry – thus ensuring the movement of goods and proving the strategic importance of maritime for our livelihoods.



3. GLOBAL MARITIME INDUSTRY

The global maritime transport industry is fundamental to international trade, being a cost effective and sustainable means of transporting large volumes of many essential commodities and finished goods. In 2020, the total annual world seaborne trade amounted to 11.5 billion tonnes and 1.5t per capita, some 88% of global trade (up from 85% in 2019 as the COVID-19 pandemic had a greater impact on other modes of transport including air, truck and rail). The EU is responsible for ~20% of global maritime trade and its maritime industries are relatively under-represented in terms of shipbuilding (around 5% of global output but focused on the cruise sector), generally aligned in terms of flag state representation (~17%) and ship repair (~18% of global activity), and well-represented in terms of vessel ownership (33%, rising to 39% if Norway and the UK are included), marine equipment, classification and ship finance.

4. MARITIME TRADE IMPACT IN THE EU:

SIGNIFICANT IMPACT INITIALLY, COMMODITY AND

GEOGRAPHICAL COMPLEXITIES, STRONG RECOVERY

The impact of the COVID-19 pandemic led global seaborne trade to decline by -3.6% y-o-y in 2020, a similar rate to the drop in global GDP. Disruption to the world economy from the pandemic led global GDP to fall by 3.5% over the full year of 2020 (source: IMF, Jan 2021), a relatively similar rate to the four quarters following the global financial crisis (Q4 08-Q3 09: -2.5%, IMF). Impacted by COVID-19 and the related disruption to the world economy, trade flows and supply chains, the world seaborne trade (in tonnes) is estimated to have declined by -3.6% across 2020 (source: Clarksons Research, Feb 2021). However, there was a notable variation in the rate of decline across seaborne commodities, and the overall impact on global seaborne trade in 2020 may not have been as negative as many had initially feared (for context, the global seaborne trade in tonnes fell by 4.0% in 2009).

An analysis of customs data reported by EU Member States suggested that in 2019, 20% (2.4bn tonnes) of global seaborne trade (11.9bn tonnes) was accounted for by a combination of intra-EU volumes and imports and exports between the EU and non-EU states. Based on available data up to and including December 2020, it is estimated that EU seaborne trade declined more significantly than global trade at 9.3% across 2020, corresponding to a 'loss' of 226 million tonnes of trade. The most significant decline

in trade volumes was in imports into the EU from non-EU states, which fell by 12.2% in 2020, followed by intra-EU trade (down 7.1% over the same period) and then exports from the EU to non-EU states (down 4.3%).

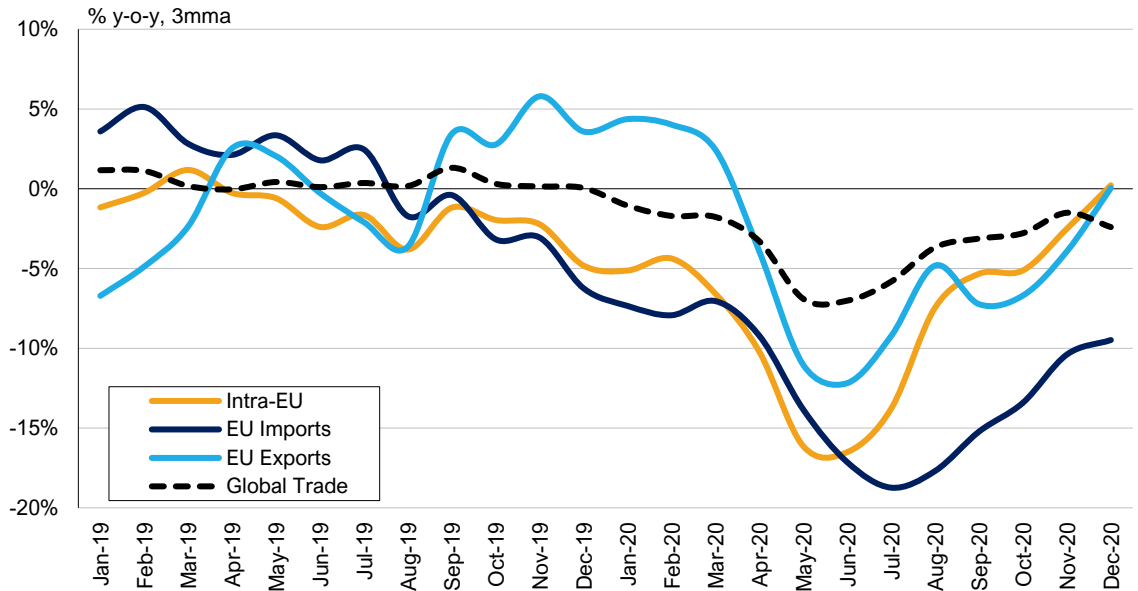


Figure 2: EU Seaborne Trade Summary, tonnes, % y-o-y, 3-month moving average⁴

An overview on how the shipping routes from Europe to China and from Europe to the United States of America (US) have been affected has also been performed. Traffic from China to Europe has been reducing in terms of the number of port calls since 2016, and by 2019 it had already reduced by -34%. In 2020, most likely due to the COVID-19 pandemic, this reduction reached -62% when compared to 2016. In the opposite voyage direction, from Europe to China, these reductions are -26% from 2016 to 2019 reaching -65% from 2016 to 2020.

A similar exercise was made for port calls generated by ships sailing to and from the USA, the most important destination for goods exported by the EU⁵. The number of port calls made by ships trading between the EU and the USA is much lower compared to the equivalent calls for ships between the EU and China. However, this does not necessarily imply that the traded volumes, and especially the total value of goods, is lower or higher when comparing trade to/from the USA and to/from China. A decrease of -31% in port calls by ships travelling from the US to Europe was observed from 2016 to 2019, passing to -58% in 2020. These reductions are more representative in the opposite direction, i.e. from Europe to US being -55% from 2016 to 2019, and -70% from 2016 to 2020.

A further analysis of the total deadweight displaced in these voyages shows a decreasing trend of deadweight tonnage (DWT) similar to that observed for the number of port calls. Thus, the data suggests the direct exchange of goods via maritime routes between Europe and the USA and Europe and China has been reducing since 2016, with a larger reduction noted in 2020.

⁴ Source: Clarksons Research. Basis EU customs data up to and including December 2020. Basis EU-28, does not include Norway or Iceland. Global seaborne trade data basis published Monthly Global Seaborne Trade Growth Indicator, as at Feb-21

⁵ <http://www.europarl.europa.eu/factsheets/en/sheet/160/a-uniao-europeia-e-os-seus-parceiros-comerciais>



INTRA & EXTRA EU SEABORNE TRADE BY COMMODITY

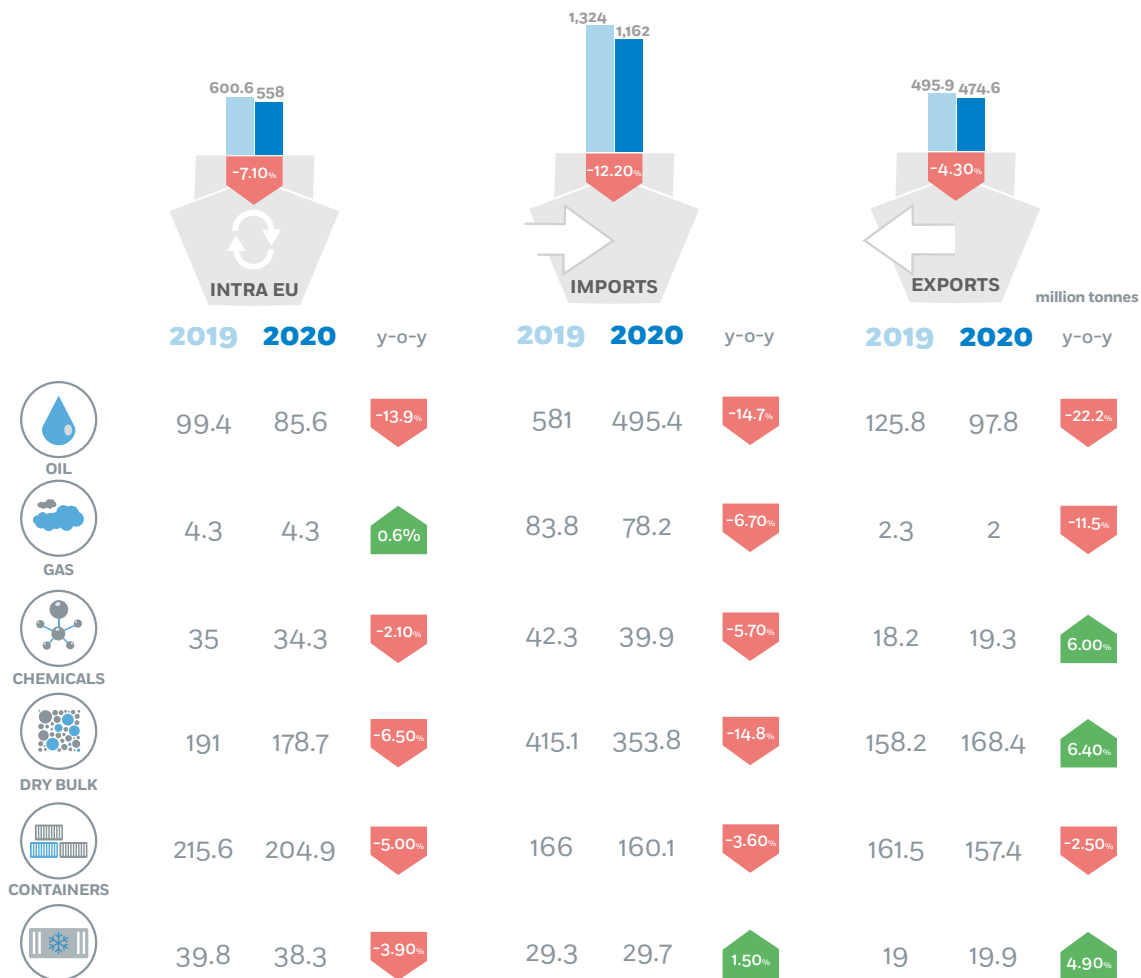


Figure 3: Intra-EU Seaborne Trade and External Seaborne trade (import and export) by Commodity, million tonnes⁶

⁶ Source: Clarksons Research. Basis EU customs data up to and including December 2020. Basis EU-28, does not include Norway or Iceland. Global seaborne trade data estimates as of Feb-21

5. FREIGHT RATE IMPACT: SIGNIFICANT VOLATILITY, WITH PERIODS OF “DISRUPTION UPSIDE” FOR FREIGHT COSTS & VESSEL EARNINGS

Global seaborne freight and charter markets experienced major volatility and disruption throughout 2020 due to the impact of COVID-19. Despite significant disruption, the global cross-segment ClarkSea Index (which indicates movements in average vessel charter cost/earnings across the key “volume” shipping sectors) averaged just -2% down y-o-y in 2020, though there was significant variation and notable individual sector complexity with many sectors seeing “disruption upside” at some point during the year. The first half of 2020 in particular was the best half year for the ClarkSea Index in a decade, averaging \$16,373/day, though the average in the second half of the year slipped back to \$13,304/day. The first half ‘spike’ was generally driven by a surge in demand for ‘floating storage’ tanker usage, as COVID-19 related ‘lockdowns’ led to a rapid build-up of surplus oil globally and oil prices in contango.

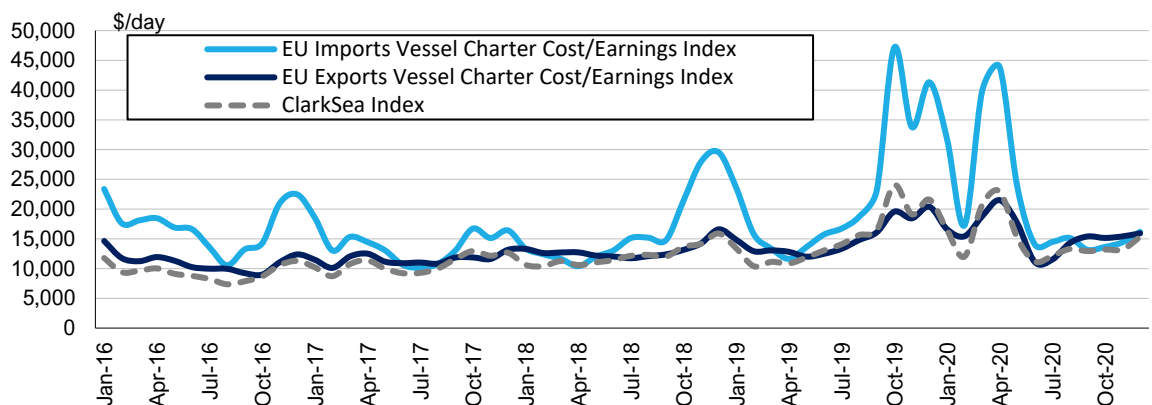


Figure 4: Extra-EU Vessel Charter Cost/Earnings Indices⁷

Trends for the EU shipping market were broadly similar to global trends. The EU Extra-Imports vessel earnings index averaged \$21,470/day across 2020, down by just -6% on the 2019 average, although there was significant variation across the year. The EU Extra-Imports vessel earnings index peaked (on a monthly basis) at \$43,876/day in April, and averaged \$28,439/day across the first half of 2020, with support from the “spike” in tanker costs/earnings, before declining in the second half of 2020 to an average of \$14,506, -49% down on the first six months of the year as tanker markets slumped, despite significant increases in costs/earnings for containerships and gas carriers later in the year.

The EU Extra-Exports vessel earnings index averaged \$15,732, 4% up on 2019, and 18% above the 2016-20 average level, despite the impact of COVID-19. However, the second half of 2020 saw a decline, with the EU Extra-Export vessel charter cost/earnings index 13% lower, averaging \$14,615/day, compared to \$16,849/day in the first half of the year, although again there were strong increases in container and gas freight towards the end of 2020.

⁷ Source: Clarksons Research



6. COVID-19 IMPACT ON EU-MS FLAG & OWNERSHIP: LONG TERM TRENDS CONTINUE

At the end of 2020, the EU-28 flagged fleet stood at a total of 9,177 vessels with a combined 238m GT, representing 17% of the global fleet in terms of tonnage. The EU-28 flagged fleet grew by just 0.1% in terms of GT in 2020, significantly below the global fleet growth of 3.0%. This was broadly a continuation of trends observed prior to the COVID-19 pandemic with the 5-year compound annual growth rate (CAGR) of the EU-28 flagged fleet standing at 1.9%, compared to 3.4% for the global fleet. Generally, the EU-28 flagged fleet is well-represented in the ro-ro freight segment (58% of global ro-ro tonnage is flagged in one of the EU Member States) and passenger sectors (40% of both cruise and ferry tonnage is flagged in the EU-28), due to its geographical characteristics and the many islands between EU Member States, but 76% of the total fleet in terms of tonnage is still accounted for by tankers, bulkers and containerships.

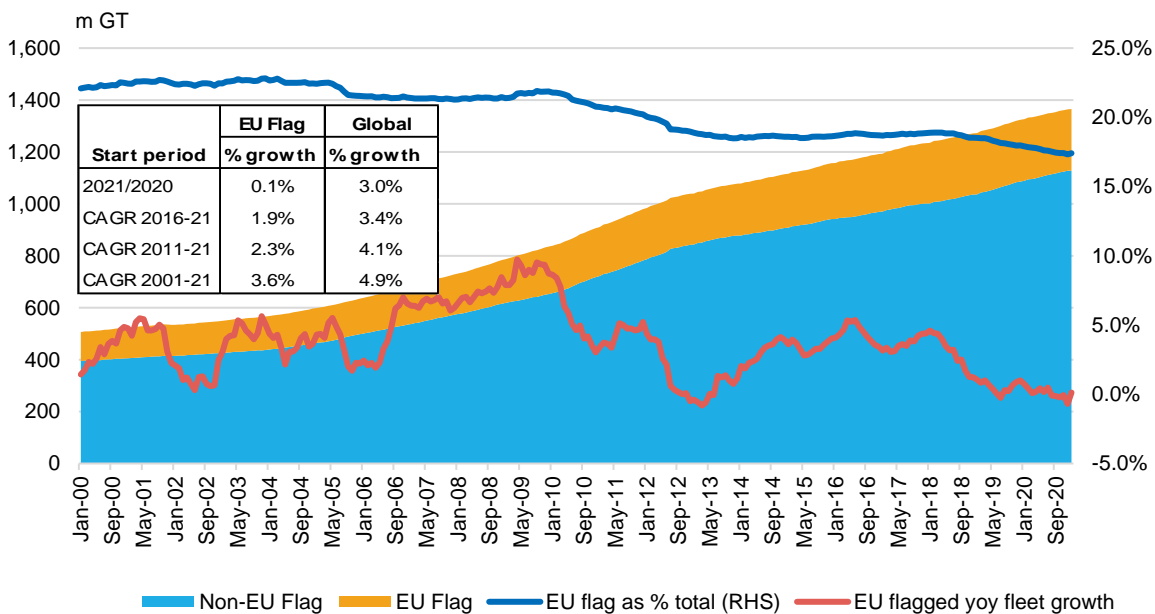


Figure 5: Long-term fleet development of EU-MS flagged fleet⁸

⁸ Source: Clarksons Research

Elsewhere, the fleet owned by EU-based owners stood at 15,355 vessels of a combined 482m GT at the end of 2020, or 33% of global tonnage. Similar to the EU-28 flagged fleet, growth in the EU-28 owned fleet has been trending downwards relative to global growth, and in 2020 the fleet expanded by just 1.4% relative to a global 3.0%. Fleet growth, however, has been varied across Member States with strong recent and historic growth in the Greek-owned fleet (the largest owner), but long-term decline in the fleet of German owners, the second largest EU owner nation. The EU-28 orderbook (total outstanding vessel orders) stood at 5.9% of fleet capacity at the end of 2020 compared to 8.5% globally.

With the exception of ferries, the EU-28 flagged and owned fleets are generally deployed on international trade routes and therefore exposed to the international freight and charter markets. Analysis of vessel movements indicates that across 2020, 87% of tonnage flagged by an EU Member State and 92% of tonnage owned by an EU Member State was internationally trading, with little variation in deployment patterns pre- and post COVID-19. In terms of port call activity, EU-28 flagged/owned vessels recorded a 13%/12% decline in port calls across 2020 compared to 8% globally, the difference reflecting the greater share of cruise and ferry tonnage in the EU-28 flagged and owned fleet.

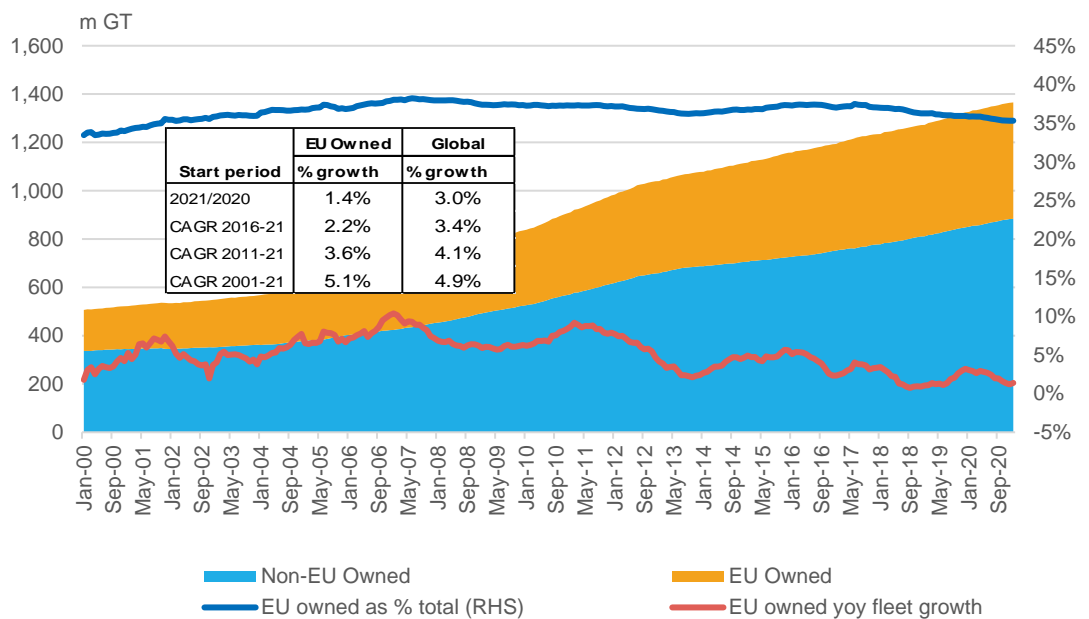


Figure 6: Long-term fleet development of EU-MS owned fleet⁹.

By examining activity on a vessel-by-vessel basis, it is also possible to examine the direct impact of COVID-19 on vessel in lay-up. At the peak, during the first wave of national lockdowns, 9% of the EU-28 flagged fleet in terms of tonnage was idle (June 2020) compared to just 3% at the start of 2020. Likewise, 6.5% of the EU-28 owned fleet was idle at the end of June 2020, around double the levels at the start of the year.

⁹ Source: Clarksons Research. Note: RHS = right hand side axis



7. SHIPBUILDING IMPACT: EU FOCUS ON CRUISE LEADS TO MATERIAL DISRUPTION

On a global level the pandemic led to a challenging year with new vessel orders falling by over 30% (also in part due to “green” technology uncertainties) although output was relatively well managed at 85% of 2019 levels. However, EU shipbuilding was deeply impacted due to its focus on the building of cruise ships.

EU yards had a global market share of 4.6% in terms of new build output in 2020 by CGT (Compensated Gross Tonnes, a measure of yard work content), compared to 5.7% in 2019. The reduction in 2020 activity was partly related to a drop in deliveries of cruise vessels, which declined by 34% in terms of GT in 2020 (vs a 15% decline globally for all ship types), with new orders of cruise ships down 98% on 2019 (34% globally). Before the pandemic, the cruise industry had been regarded as a success-story in Europe, with EU yards having a >90% market share. There were 94 cruise ships (out of 182 vessels in total) on order at EU shipyards (including Norway and Iceland) at the end of 2020, with a total newbuild value of c.\$60bn.

ANNUAL DELIVERIES BY BUILDER COUNTRY/REGION

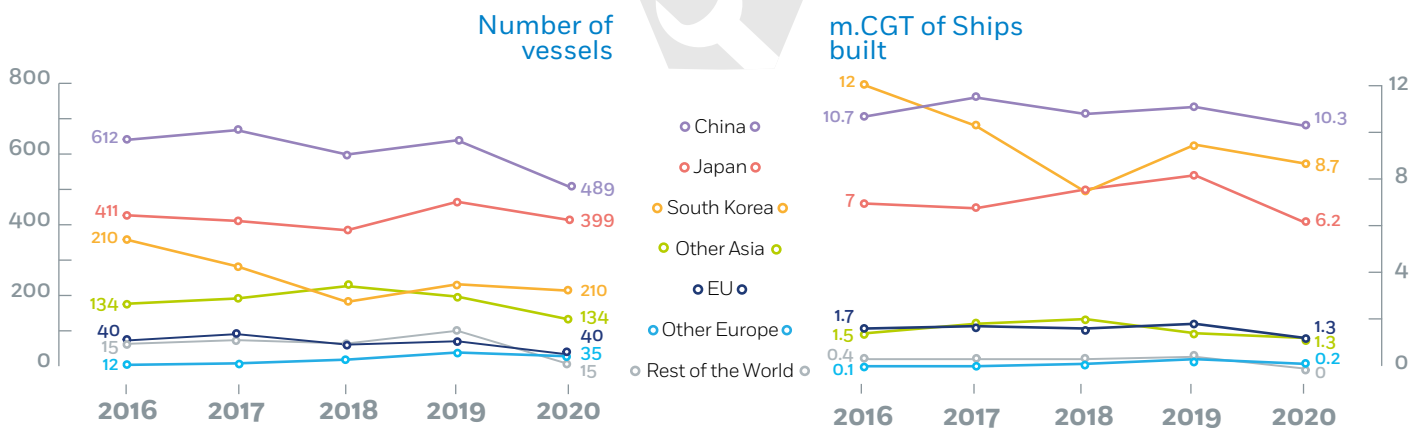


Figure 7: Annual Deliveries by Builder Country/Region¹⁰

¹⁰ Source: Clarksons Research

Ship recycling activity remained relatively low in 2020 compared to recent years. Following the spread of the COVID-19 pandemic, some shipping observers expected a large volume of ships to be sold for recycling across 2020. However, in GT terms 2020 represented the second lowest annual ship recycling volumes since the onset of the financial crisis, with the impact of the pandemic on shipping markets arguably not as damaging as initially expected, and widespread COVID-19 related restrictions limiting recycling yard activity. Across all merchant sectors, 17.4m GT was sold for demolition in 2020 (0.1m GT in the EU). The prominence of ‘green recycling’ has continued to increase following the introduction of the EU Ship Recycling Regulation (SRR) at the beginning of 2019. During 2020, a record 1.6m GT was reported sold for scrap to Turkish recyclers, with several owners of EU-28 flagged cruise and container ships choosing to recycle at ‘approved yards’ in compliance with the EU SRR. However, the majority of recycling activity still occurs in the Indian sub-continent and no facility in the area has yet been approved by the EU.

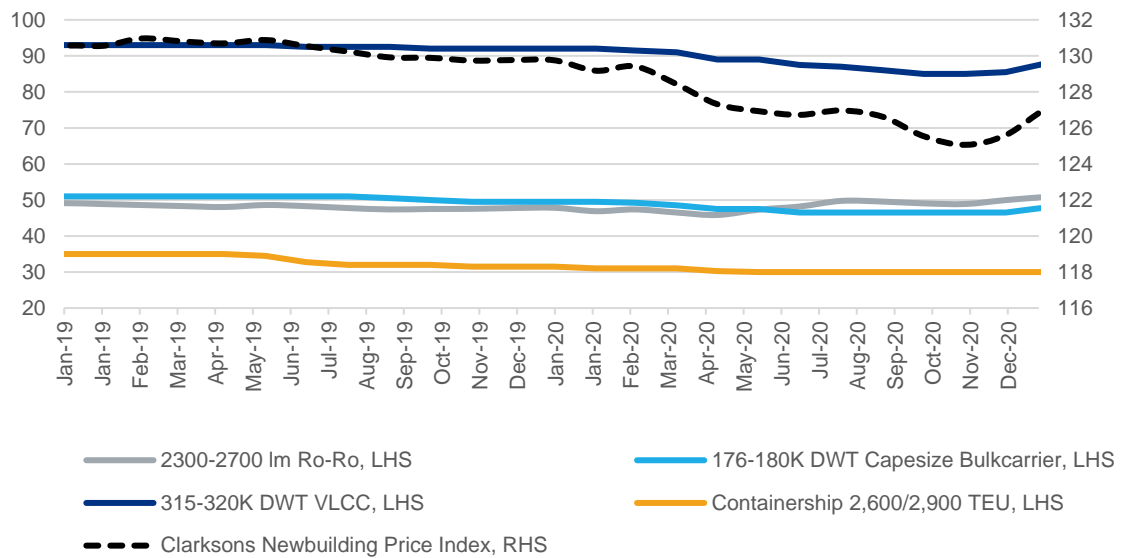


Figure 8: Monthly Newbuild Prices (Selected Sectors & Clarksons Index)¹¹

Ship repair activity remained relatively steady in 2020, despite some COVID-19 related disruption in Q2. EU yards have a larger global market share (17% of activity 2019-20) in ship repair than in new building (~5%). Some volume of work was impacted at EU yards in 2020 by yard disruption / closures and special survey deferrals following the COVID-19 outbreak, peaking in Q2 2020 when activity fell by around 10%.

¹¹ Source: Clarksons Research. Clarksons Newbuilding Price Index includes a wide range of newbuild prices across the bulkcarrier, tanker, containership, gas carrier and other dry cargo sectors, weighted by their size in dwt. January 1988=100.



8. CRUISE & PASSENGER: DEEP CRUISE IMPACT & FINANCIAL STRESS, DEEP FERRY IMPACT BUT MODERATE RECOVERY

Prior to the COVID-19 outbreak, the global cruise market was in a significant growth phase, reaching 30 million passengers per year and with a growing fleet driven by a record new building programme, mainly involving construction at European shipyards. Europe has around 25% of the global cruise market, with 7.5m passengers in 2019 up from five million ten years earlier. Measured by port calls, EU cruise ship activity fell by c.a. 85% across 2020, and by over 90% in Q2 in particular due to COVID-19 and over 90% of the fleet became idle (up from 2% at the start of the year and still over 88% by the end of 2020), with recovery potential being very limited to date. Around 30% of the global cruise fleet is EU-28 flagged (27% excluding the UK) and around 18% is owned by EU companies (at the parent group nationality level).

The COVID-19 pandemic has caused unprecedented disruption across the global ferry market, albeit not as severe as in the cruise sector, and with some earlier recovery signs. EU-28 owners and flags are over-represented with around 50% of ferry tonnage globally. EU ferry activity by port calls fell by 19% across 2020, but disruption peaked at -36% y-o-y in Q2 and improved to -10% in Q4.

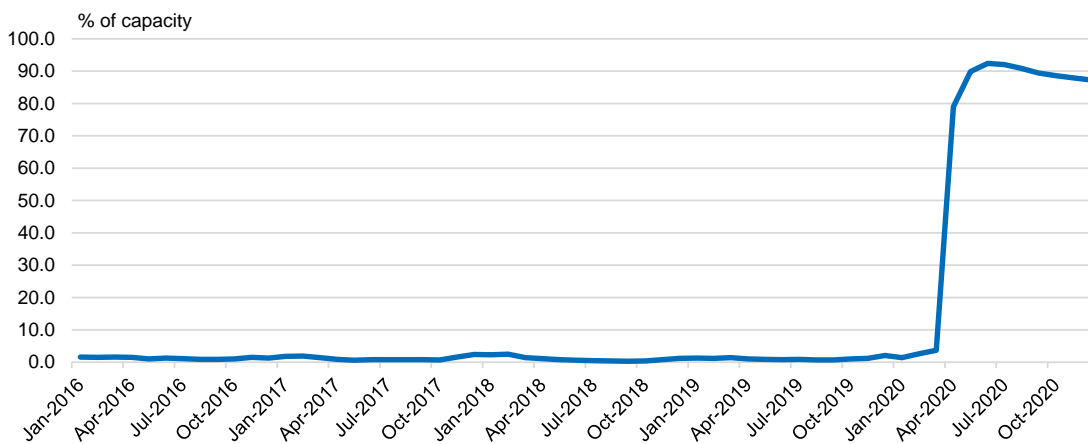


Figure 9: Idle Cruise Capacity as a Percentage of the Fleet¹²

¹² Source: Clarksons Research.

Ships carrying passengers (cruise ships, passenger ships and ro-ro/passenger) were most affected by the pandemic. The report shows that the number of persons on board (PoB) on cruise ships began to decrease gradually from the second quarter of 2020 and remained at a very low level, mainly accounted for by crew members remaining on board the vessels. Every major cruise line in the world suspended departures in mid-March as the coronavirus outbreak grew, with some returning to operations in a limited number of vessels and areas.

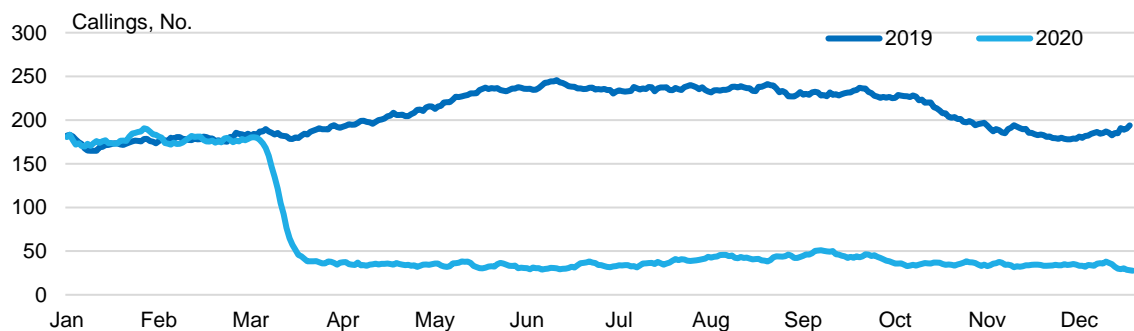


Figure 10: Global Cruise Ship Callings, 2019-2020, 7 day moving average¹³

This report confirms that the cruise segment, and in general the transport of passengers, are the sectors most heavily impacted by COVID-19. Other sectors were also impacted, but in general trade did not stop. Despite the difficulties, commercial ship operations, ports and other maritime transport sectors continued to operate, ensuring the movement of goods and proving the strategic importance of the maritime transport industry for citizens.

9. SAFETY AND ENVIRONMENTAL INSPECTIONS

Port State Control (PSC) inspection activities by the EU countries of the Paris MoU and by the members of the Tokyo MoU in the period between 2016-2020 show a strong impact on the number of inspections carried out during the second quarter of 2020. However, in the third and fourth quarter inspections of EU-28 flagged vessels nearly returned to normal levels. At the same time, it can be noted that the number of detentions did not drop during 2020, leading to a higher ratio of inspections resulting in a detention. This could be evidence of a larger amount of detected breaches or violations of the provisions of the international conventions governing shipping.

The occurrence of inspections leading to detentions as performed by the EU Member States which are part of the Paris MoU appears rather stable in the past 5 years, although the long-term trend for EU-28-flagged ships is negative. Notably, an increase in the ratio of detentions is noted during 2020, which is not reflected by ships with a non-EU-28 flag at the time of the inspection. However, even during the worsening period in 2020, EU-28 flagged ships are still doing better than ships flagged elsewhere.

¹³ Source: Clarksons Research. Port calls data based on vessel movements data. Port calls data basis all instances of a vessel entering and leaving a defined port location, excluding instances where vessel not recorded as travelling at less than 1 knot, and combining multiple consecutive instances at the same port where the vessel has not left a buffered shape around the port or within the same day (in selected vessel sectors). Port calls dated according to date of entry into port location.

From this analysis, it can clearly be seen that the pandemic also seriously affected the opportunities for Port State Control inspections by maritime authorities in the Tokyo MoU area. It is interesting to note that the volume of inspections was affected throughout the year rather than just in the second quarter of 2020, as happened in the EU.

Furthermore, it should also be noted that, contrary to what happened in the EU, inspections leading to detentions of EU-28 flagged ships diminished significantly during 2020. Overall, the occurrence of inspections leading to detention is rather low compared to similar figures from EU Port States (1.5% for Tokyo MoU inspections versus 3% for Paris MoU inspections performed by EU States).

INSPECTIONS AND DETENTIONS BY EU PORT STATE

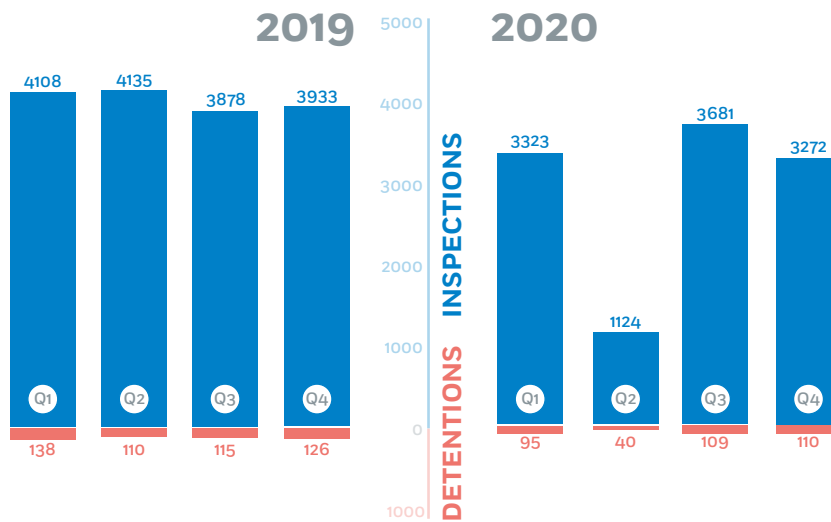
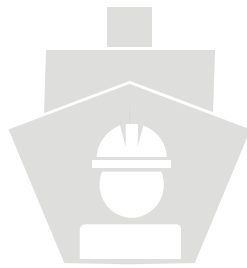


Figure 11: EU Port State inspections and detentions

The inspection effort by EU Port States is regulated by the 'fair share' or 'annual commitment' stipulated in Directive 2009/16 EU on Port State Control. The commitment is agreed annually, and States comply with the set target throughout the year. During the second quarter of 2020 many national health authorities imposed a ban on the performance of inspections, which led to a strong overall reduction in the numbers. In the third quarter the ban was partially raised, and several Member States started inspecting again, even beyond their originally agreed commitment. This led to a similar effort overall, but a different distribution of inspections among Member States. The fourth quarter saw a restart of inspections in all Member States, and a pre-pandemic level was almost achieved. Still, the impact is significant, even at the end of 2020.



Information on issued statutory and class certificates by the organisations recognised in accordance with Regulation 2009/391 (EU) on common rules and standards for ship inspection and survey organisations, is stored in EMSA applications and has been analysed. The data shows that 2020 was characterised by a stable issuance of new class certificates, where class certificates represent the completion of renewal (special) surveys. This suggests that operations were not overly affected by the pandemic. However, the last quarter of 2020 saw a reduction in the number of ships issued with a new class certificate. This may be explained by a stronger impact of the pandemic worldwide or may be due to the fact that the work had been carried out at an earlier point in the year.



EMSA has also looked at statistics on the marine casualties and incidents falling within the scope of Directive 2009/18/EC that were reported to EMCIP between 2016-2020. EMCIP data shows a drop in the overall figures of accidents and incidents in 2020 in comparison with the average data from 2016-2019. The decrease does not appear homogenous for all ship types, probably due to their different types of service, and the operations undertaken. In this respect, passenger vessels record the most significant drop in the number of accidents, which may be explained by the widespread halt in cruise vessel activity. The reduction for cargo vessels appears more pronounced during Q3 and Q4. Fishing vessels registered a sharp increase in the number of accidents in Q3. The type of casualty event also presents mixed trends; in general, the number of navigational accidents decreased in the period in question, while other types of casualties increased in specific quarters of 2020 (e.g. loss of control and contact in Q1, fire in Q3 and flooding/foundering in Q4).

Sulphur inspection activities in the EU in 2018-2019 (average number) and 2020 were compared. During the months of January and February 2020, the number of inspections remained at comparable levels with 2018 and 2019. However, since March 2020, there was a decrease in the total number of inspections. In particular, in March 2020, only 43% of the 2018/2019 inspections were conducted. In April 2020, only 10% of the inspections were carried out. A recovery was observed, however, from June, and in September 2020, 5% more inspections than in 2018-2019 were carried out.



In terms of the total number of inspections per sea region, the greatest reduction in total number of inspections (compared to previous years) has been observed in the North Sea, followed by the Baltic Sea and to a lesser extent outside the Sulphur Emission Control Areas (SECA). The results of the analysis of fuel samples taken during the sulphur inspections show that, although a progressive increase in compliance levels has been observed since 2018, this increase has been more significant in 2020. In terms of ship types, important reductions in the total number of inspections conducted in 2020 compared to the previous year on passenger ships (the category which for sulphur statistics mainly correspond to inspections on cruise ships) were observed. This has been followed by reductions among general cargo ships and bulk carriers. Conversely, inspections on container ships and ropax ships have been less affected by the COVID-19 situation.



ABOUT THE EUROPEAN MARITIME SAFETY AGENCY

The European Maritime Safety Agency is one of the European Union's decentralised agencies. Based in Lisbon, the Agency's mission is to ensure a high level of maritime safety, maritime security, prevention of and response to pollution from ships, as well as response to marine pollution from oil and gas installations. The overall purpose is to promote a safe, clean and economically viable maritime sector in the EU.

Get in touch for more information

European Maritime Safety Agency

Praça Europa 4
Cais do Sodré
1249-206 Lisboa
Portugal

Tel +351 21 1209 200 / Fax +351 21 1209 210
emsa.europa.eu / [Twitter@EMSA_Lisbon](https://twitter.com/EMSA_Lisbon)

© European Maritime Safety Agency 2021

Photo credits: Epicstockmedia/Shutterstock.com; Olivier Lantendorffer/iStock.com; newsfocus1/iStock.com; wissanu01/iStock.com; Sky_Blue/iStock.com; t-design/Shutterstock.com; Alex Stemmer/Shutterstock.com; Pavel L/Shutterstock.com; Nightman1965/Shutterstock.com; JuliusKielaitis/Shutterstock.com; jorisvo/Shutterstock.com; IndustryAndTravel/Shutterstock.com; Bildagentur Zoonar GmbH/Shutterstock.com; Andrey Armyagov/Shutterstock.com; Alex Marakhovets/Shutterstock.com; Igor Kardasov/Shutterstock.com; Wojciech Wrzesien/Shutterstock.com; lam_Anupong/Shutterstock.com; triple v./Shutterstock.com; Alexander Schedrov/Shutterstock.com; levgen Postovyk / Shutterstock.com; Rasto SK/Shutterstock.com; narvikk/iStock.com.