

Market analysis: Electrofuels in Norrbotten County, Sweden

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This study assesses the role of electrofuels in enabling low-emission transport and industrial transition in Norrbotten County. It aims to evaluate market readiness and outline key barriers and opportunities.

Reference:
Linde, L., Styhre, L., Bach, H. & Backlund, M. (2026) Market analysis: Electrofuels in Norrbotten County, Sweden. IVL-Report number: B11245, ISBN number: 978-91-7883-829-5.



Introduction to H2Derivatives@Baltic Sea Ports

Partners:

Swedish organisations:

CLOSER



Associated organisations:

Business



Project partners' location

H2Deri@BSP is a collaborative project supporting the maritime sector's transition to low- and zero-emission hydrogen-based fuels (electrofuels), including methanol, ammonia, and hydrogen, in the Baltic Sea region. The project is led by Port of Hamburg Marketing.

A 2025 market analysis across eight Baltic Sea countries shows growing momentum for renewable maritime fuels, although the electrofuel market remains at an early stage (Styhre et al., 2025).

This report focuses on the **Norrbottn County** assessing the current situation and market outlook for electrofuels for maritime and broader applications. The analysis is based on 12 in-depth interviews and a stakeholder workshop with key regional actors across the value chain (see Appendix).

The project is funded by Interreg Baltic Sea Region, with co-funding from the European Union and the Swedish Transport Administration. The report has been prepared by Closer, LTU Business and IVL Swedish Environmental Research Institute.



Norrbotten County, Sweden

- Norrbotten County area and northern Sweden, bordering Finland and Norway, with access to the Baltic Sea and proximity to Arctic trade routes. The county covers ~25% of Sweden's land area and is about the same size as Estonia and Latvia combined.
- The region is the most sparsely populated in the EU (~250 000 inhabitants), with long distances between urban centers and a dispersed settlement structure.
- Norrbotten hosts energy- and resource-intensive industries, including mining (iron ore), steel production, and emerging green industrial projects (e.g. fossil-free steel and hydrogen).
- The region has abundant access to renewable electricity, primarily from hydropower, making it attractive for energy-intensive and electrofuel production.
- Long distances, export-oriented industries, and limited infrastructure create strong demand for efficient, reliable, and low-emission transport solutions, particularly for maritime and heavy freight.



Renewable fuels and propulsion technologies for ships

Electricity/Batteries

- Tested in marine applications
- Smaller ships are generally suitable for full electrification and larger ships for hybrid solutions



HVO (Biodiesel)

- Requires no specific adaptation of engines
- Does not reduce emissions of NO_x and particles

Wind

- So far mainly as assisting energy supply in marine applications
- Ongoing development for wind as a primary energy source



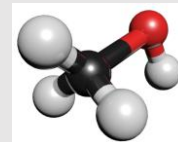
Biogas/Liquefied Bio Methane

- Good climate performance
- Requires no adaptation of LNG-powered ships
- Problems with methane slip



Methanol

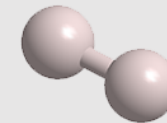
- Proven in marine applications
- Good climate performance if input is from biomass or green electricity
- Plans for production in Sweden



ELECTROFUELS

Hydrogen

- To some extent tested in marine applications
- Does not contain carbon
- Low energy content per volume requiring bulky storage



Ammonia

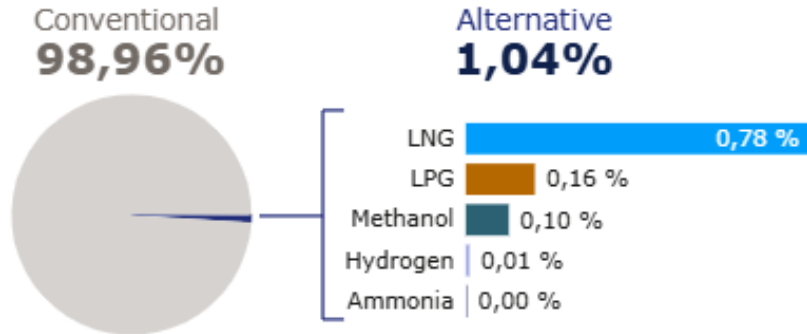
- Barely tested in marine applications
- Does not contain carbon
- Highly toxic
- Several safety issues to be resolved



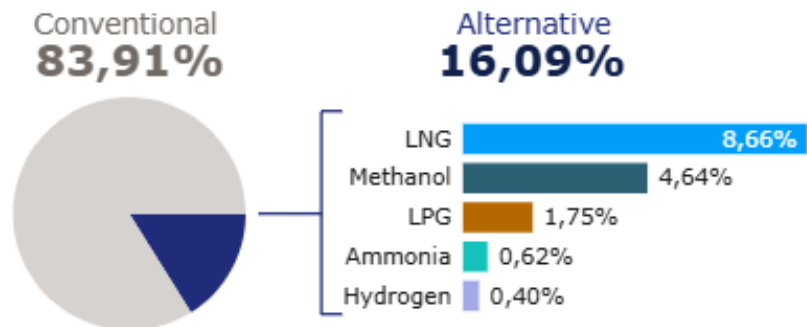
Source: Styhre, et al. (2024)

Ships in operation and in global orderbook

In operation



On order



- LNG growing as a key bridging fuel
- Dual-fuel ships retain fossil fallback
- Biofuels will be used where available, but constrained by feedstock and competing demand
- Electrofuels (hydrogen, methanol, ammonia) limited and costly before 2030; expected growth after 2030
- Large-scale ammonia propulsion unlikely before ~2035

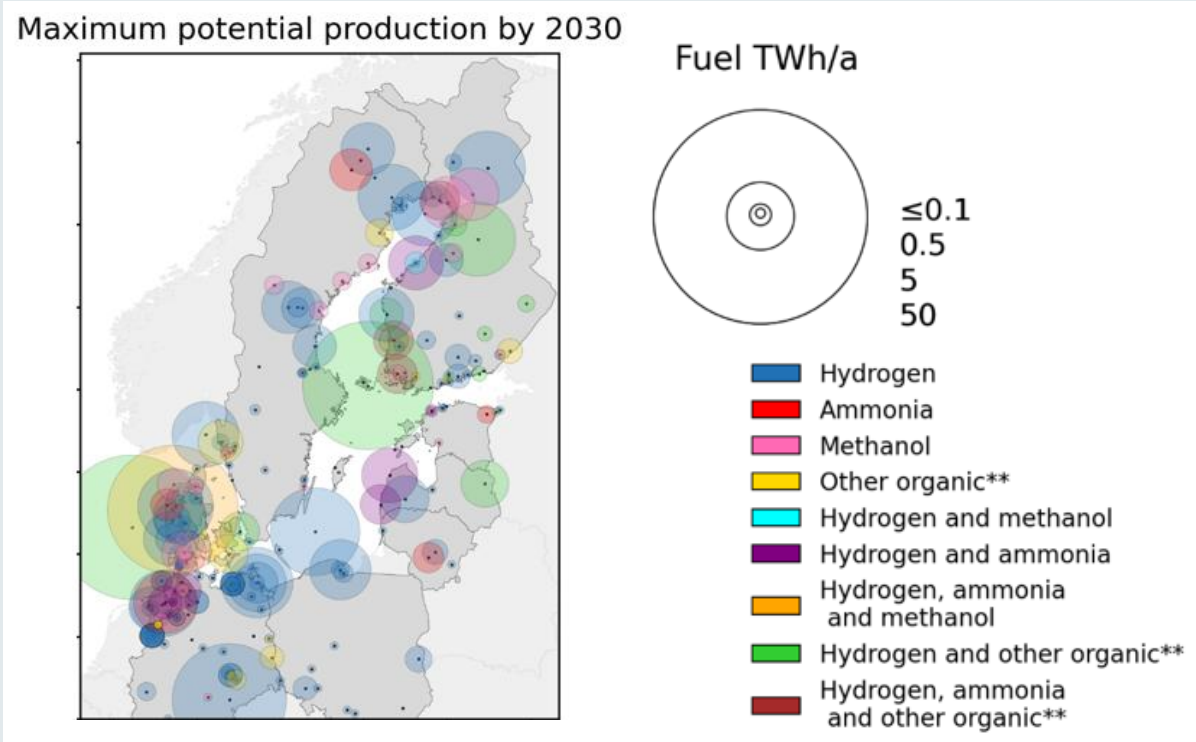


Alternative Fuels Insight

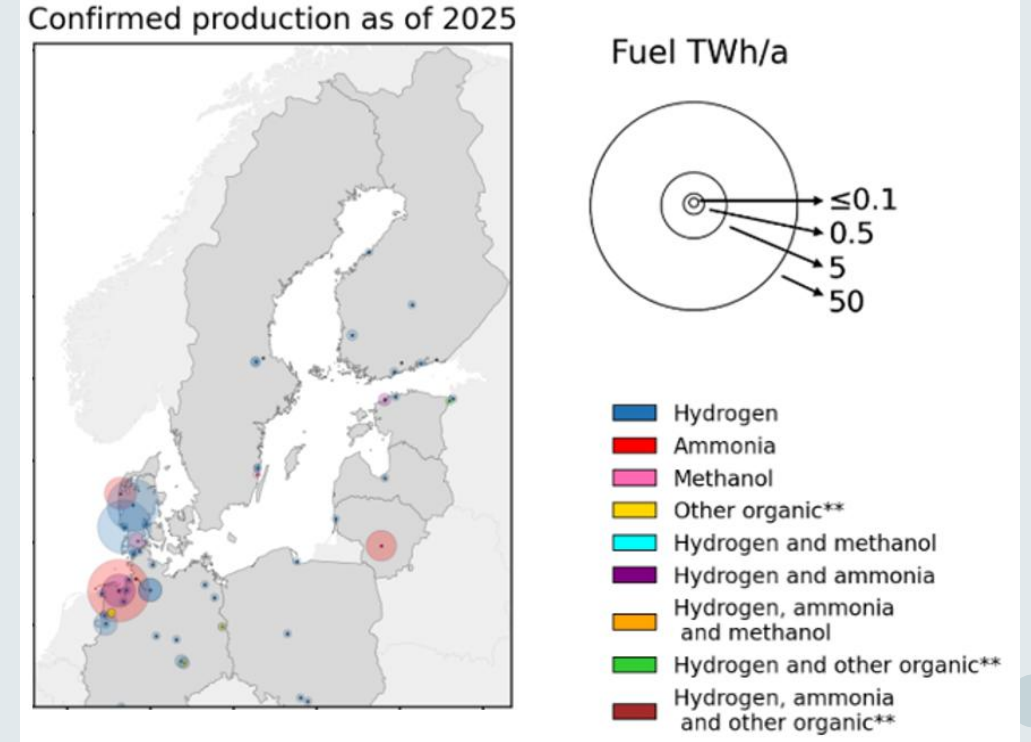
Source: <https://afi.dnv.com/>



Ongoing and planned projects for electrofuel production



- 298 projects identified in the Baltic region
- Fuel type often undecided during development
- Half of the potential electrofuel production is hydrogen
- Capacity available for the maritime sector is ~84 TWh/year (24%)
- Total planned capacity: ~338 TWh/year (~31 million tonnes of oil-equivalents)



- 38 projects (~3 TWh) in operation
- Most projects still in planning stage
- Many projects cancelled/on-hold, with high uncertainties
- We estimate that ~7–25% will be realised, reflecting high uncertainty for future supply quantities

Policy landscape and regulations

The legislative landscape is evolving. Some key policy instruments are already in place, with both direct and indirect implications for Norrbotten County.

GLOBAL REGULATIONS (IMO)

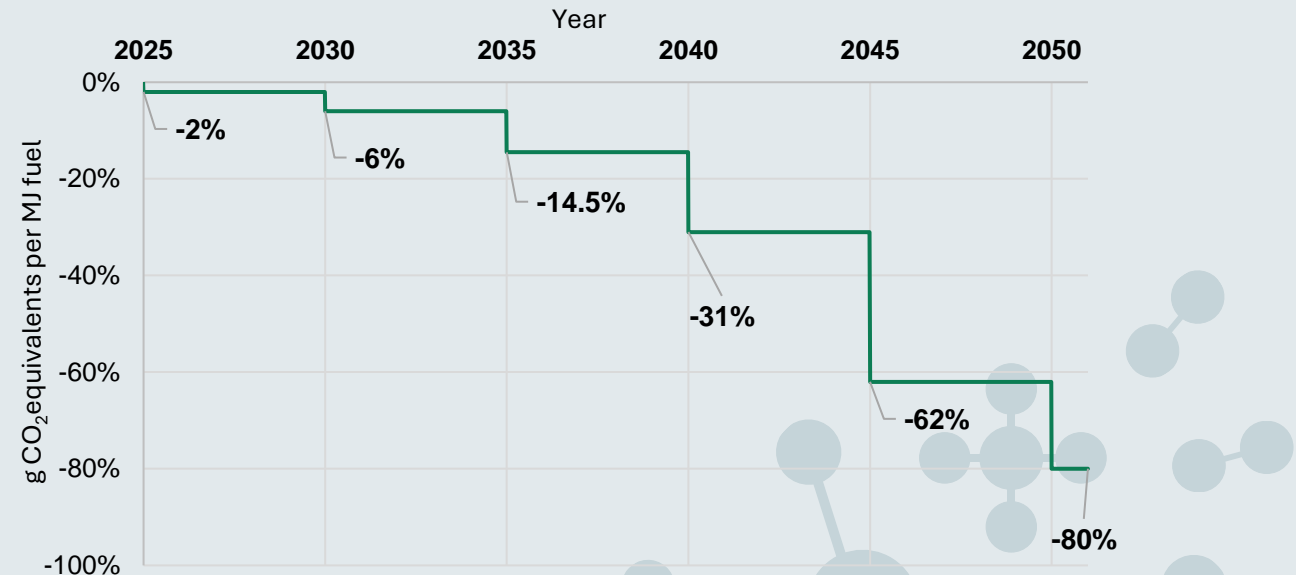
- IMO strategy targets net-zero GHG emissions from ships 2050 (MEPC, 2023)
- In 2025 IMO delayed the final adoption of a legally binding net-zero GHG regulation for shipping

NATIONAL REGULATIONS AND SUPPORT (SWEDEN)

- Klimatklivet - supports climate investments
- Industriklivet - supports industrial decarbonisation
- Environmentally differentiated fairway and port fees - incentivise more sustainable vessel operations

EU REGULATIONS

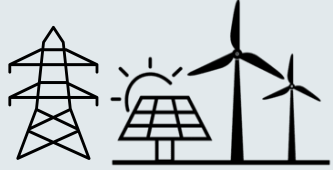
- EU ETS Maritime (European Union, 2023a) - applies to vessels larger than 5 000 GT that call European ports - requires use of low-GHG fuels
- FuelEU Maritime (European Union, 2023b)
- AFIR (Alternative Fuels Infrastructure Regulation – on-shore power supply requirements)



Development of required reductions of the greenhouse gas intensity of the fuel in relation to 2020 in accordance with FuelEU Maritime.

Future market and actors

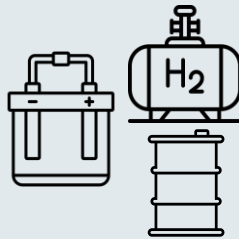
Renewable electricity production



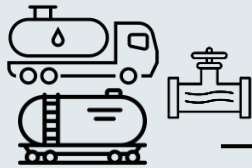
Biogenic carbon dioxide



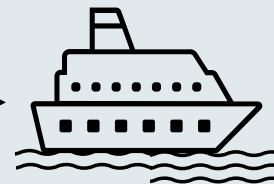
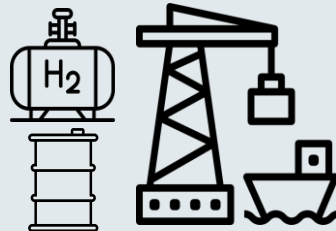
Electrofuel production



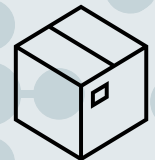
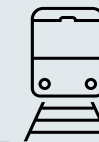
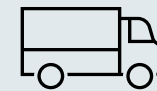
Distribution infrastructure



Port infrastructure



Low and zero emission transport



The port authority
Port management
Terminal operators
Stevedoring

Charterers
Shipping agents
Cargo brokers
Freight forwarders

Technology providers
Energy companies
Energy suppliers

Energy infrastructure provider
Rail and road transport provider

Bunker companies

Shipping companies

Rail and road
transport provider

Cargo owners/
Shippers

Authorities and decision makers

Maritime commissions
Flag State
The IMO
The EU
Local authorities

Other notable groups

Financial institutions
Non-governmental organisation
Labor unions and workers' representatives
Trade associations
Training institutions
Research and academic institutions



Market analysis – SWOT analysis

This analysis takes starting point in the strengths, weaknesses, opportunities and threats for electrofuel production in the Norrbotten County. Factors are listed in order of importance as indicated by study participants during interviews and the workshop.

STRENGTHS

- Access to resources
- Knowledge and expertise
- Ambition
- Collaboration

WEAKNESSES

- Chicken-and-egg dilemma
- Lack of infrastructure
- Long lead times for new infrastructure
- Lack of capacity & supply limitations
- Competition around good production sites
- Lack of coordination

OPPORTUNITIES

- Potential synergies with heavy industry
- Green transition trend
- Customer demand for green transport
- New routines for electricity grid connections
- Recent investments in infrastructure
- Possibility to re-use/adjust existing infrastructure
- Sharing the risk between actors

THREATS

- Lack of clear political direction
- Price gap with conventional fuels
- Conflicts of interest & veto mandates
- Electricity market uncertainty
- Geopolitical uncertainty

Market analysis – Strengths

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

Access to resources: Norrbotten has strong access to renewable and relatively low-cost electricity, biogenic CO₂, land, water, and potential storage capacity, creating favourable conditions for electrofuel production. Excess heat can also be integrated into local district heating networks, improving overall system efficiency.

Knowledge and expertise: The region has a strong industrial knowledge base relevant to hydrogen and methanol. Initiatives such as HYBRIT (joint initiative by SSAB, LKAB, and Vattenfall to by replacing coking coal with fossil-free hydrogen for steel industry) have shown promising results, while ports and energy actors already have practical experience of handling and assessing alternative fuel solutions.

Ambition: Many actors in the region show high ambition and see electrofuels as important for both the green transition and long-term regional competitiveness. This creates momentum even in areas where investments are still at an early stage.

Collaboration: Norrbotten benefits from a strong and established network among authorities, ports, industry, and infrastructure actors. Regional collaboration is further reinforced through cross-border cooperation with European partners such as Gasgrid Finland. Intermediary and supportive actors like Länsstyrelsen (The County Administrative Board) play a key role in this ecosystem by actively connecting different regional stakeholders and acting as a bridge by lobbying for Norrbotten's interests at the national government level.

"The prerequisites for electrofuel production in Norrbotten are very good. Currently there is a large overproduction of electricity and there is access to other necessary resources."

"Electrofuels are extremely important for business in Norrbotten. Companies here need to remain competitive tomorrow and in 30 years, and in that context, electrofuels are an important factor for the competitiveness of shipping and heavy industry going forward."

Market analysis – Weaknesses

Chicken-and-egg dilemma: Electrofuel producers are hesitant to invest due to demand uncertainty, consumers are hesitant to invest due to supply uncertainty. In addition, multiple choices of future fuel pathways adds to hesitance among ship-owners and ports.

Lack of infrastructure: there is currently very limited electrofuel infrastructure, such as pipelines, storage and bunkering facilities. There is also limited available physical space in Norrbotten ports, which hinders construction of storage, bunkering and cargo loading infrastructure. Such construction would also require large investments, further limiting the possibilities for ship transport of electrofuels and using electrofuels as ship fuel. The electricity grid in the region is furthermore partially inadequate and requires increase of electrical grid capacity to enable electro fuel production in additional locations.

Long lead times for new infrastructure: permitting processes, planning and construction takes a long time. Permitting processes are complex due to conflicts of interest at national and local level regarding land use (electricity/electrofuel production vs. reindeer grazing lands, national parks, protected species, military interests and private landowners' interests). Lead time for implementation of new electricity production was estimated to 10-15 years, of which attracting external financing and physical construction time was indicated as the major part, implying that improved conditions for electro fuel production is far into the future.

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

"A lot of costumers are interested, but not interested enough to invest."

"We don't really have a tradition of investing in gas infrastructure in Sweden. At the national level, it's almost non-existent."

Market analysis – Weaknesses

Lack of capacity & supply limitations: All of the planned and current availability of electrofuels in the region is reserved for heavy industry. Similarly, the power capacity of the electricity grid is limited as all available capacity is already reserved for planned projects, leaving few possibilities to scale up electrofuel production to use as ship fuel.

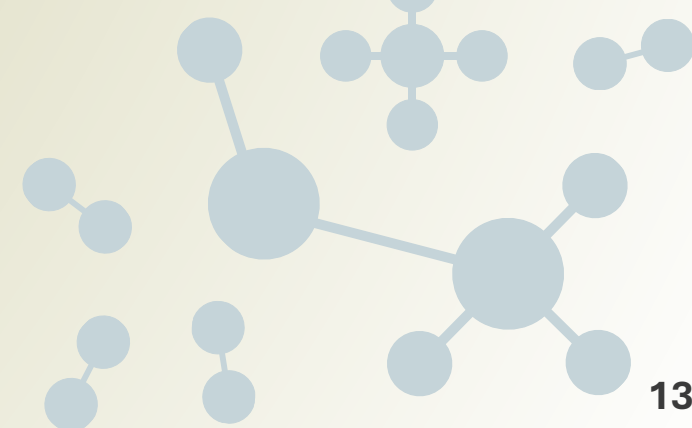
Competition around good production sites: Although the region offers access to resources necessary for electrofuel production, there are very few locations where these resources are co-located.

Lack of coordination: Lack of dialogue and coordination between actors, relating to for example future electricity and power needs, which actor needs to take which actions to scale up electrofuels production, and the choice of alternative fuel to implement for ships operating in Norrbotten ports.

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

“In the Norrbotten region, the power capacity of the grid is completely blocked by a few actors who do not use that capacity yet, but they are first in line.”

“Typically, something is missing, there are actually quite few sites that have all the ingredients you need in terms of biogenic CO₂, power capacity, water and land. Before long, these sites will run out, especially when it comes to scaling up to a cost-effective level.”



STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

Market analysis – Opportunities

Potential synergies with heavy industry: The transition benefits from knowledge spillovers from existing hydrogen projects within the heavy industry sector, as well as the possibility to utilize potential future over-production of hydrogen.

Green transition trend: Interest in electrofuels is driven by the urgent need to achieve climate targets, phase out Russian fossil gas, and increase societal resilience. Upcoming emission reduction targets and increasing stringency of performance standards in EU regulation provide increasingly strong incentives for market development.

Customer demand for green transport: There is a growing demand for green shipping from major cargo owners in the region, including LKAB and SSAB. Introducing fossil free products, these companies are looking to increase export from Norrbotten ports and will likely enforce stricter sustainability criteria for future ship transport.

New routines for electricity grid connections: To ease capacity challenges in the electricity grid, grid operators are actively working to match interested actors with locations where the grid has more power capacity. The national grid authority have furthermore included additional factors, such as assessment of level of maturity for projects applying for connection to the grid, when making prioritisation decisions.

"It is beneficial that we already are several actors working with and interested in hydrogen production, and I think there will be additional actors in the future, which is good because I think we need to be a few more involved for real action to happen."

"The storyline around producing for example green steel loses some of its credibility if the products are then transported to customers with a ship using heavy fuel oil, so we foresee a demand for alternative fuels."



Market analysis – Opportunities

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

Recent investments in infrastructure: Planned infrastructure, such as Nordion's regional hydrogen pipeline and the Aurora line (reinforcing electricity grid connections to Finland), increases system redundancy and decreases local grid competition. Furthermore, pipeline infrastructure allows production of electrofuels in optimal sites as it enables transport to costumers. Calculations indicate that it is less costly to build pipelines than expanding the electricity grid for on-site electrofuel production.

Possibility to adjust/retrofit current infrastructure: Some existing conventional ship engines can be retrofitted to run on methanol, and parts of current fuel storage and distribution infrastructure can be adapted to handle alternative fuels. There is also a future possibility of upgrading worn-out methane pipelines to hydrogen standards, a method already established in other countries.

Sharing the risk between actors: New business models are being developed to share financial risks during the initial ramp-up phase. This includes mechanisms like deferring investment costs until the market matures, using bank credit guarantees (potentially backed by the European Investment Bank at the EU level).

"We have just commissioned a third power line to Finland, Aurora line, which gives a large increase in electricity trading capacity with Finland that have a lot of wind power coming, so that's a positive development."

"We need a risk model where it is possible to postpone parts of the additional investment cost so that actors that joining later, maybe in 2045, are also part of sharing the risk."

Market analysis – Threats

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

Lack of clear political direction: Unpredictable future EU and international regulations, lack of regulations for handling hydrogen as well as the absence of a national hydrogen strategy and a political shift prioritizing nuclear power and defence over sustainability are causing energy companies to pause regional investments. Sweden is perceived to be falling behind neighbouring countries due to this lack of direction and actors expressed a need for clarification of mandates between infrastructure actors. Furthermore, conflicting directions (e.g., investing in shore power vs. alternative fuels, and which alternative fuel) create hesitance to invest among shipowners and ports.

"Businesses want stability. Once regulatory frameworks are in place, companies must be able to rely on them remaining consistent. If the rules change along the way, it becomes very difficult to make investment decisions."

Price gap with conventional fuels: Producing green fuels is currently highly expensive. This creates a persistent price gap compared to conventional fuels, making it costly for ship-owners to invest in both e-fuels and compatible vessels. Furthermore, costly investments in production and distribution infrastructure as well as expanding the electricity grid are required for upscaling electrofuel production.

"There is no availability of these fuels, and even more importantly, there is no availability with a good price. And in the end, the customers are hesitant to pay for this."

Market analysis – Threats

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

Conflicts of interest & veto mandates: Many actors have an interest in land-use in Norrbotten, including the military and reindeer herders which may object to construction of electrofuel production and infrastructure. Furthermore, large areas are protected by nature reserves and Natura2000 regulations, disqualifying infrastructure construction in these areas. Additionally, municipal and military vetoes can effectively block crucial wind power expansion.

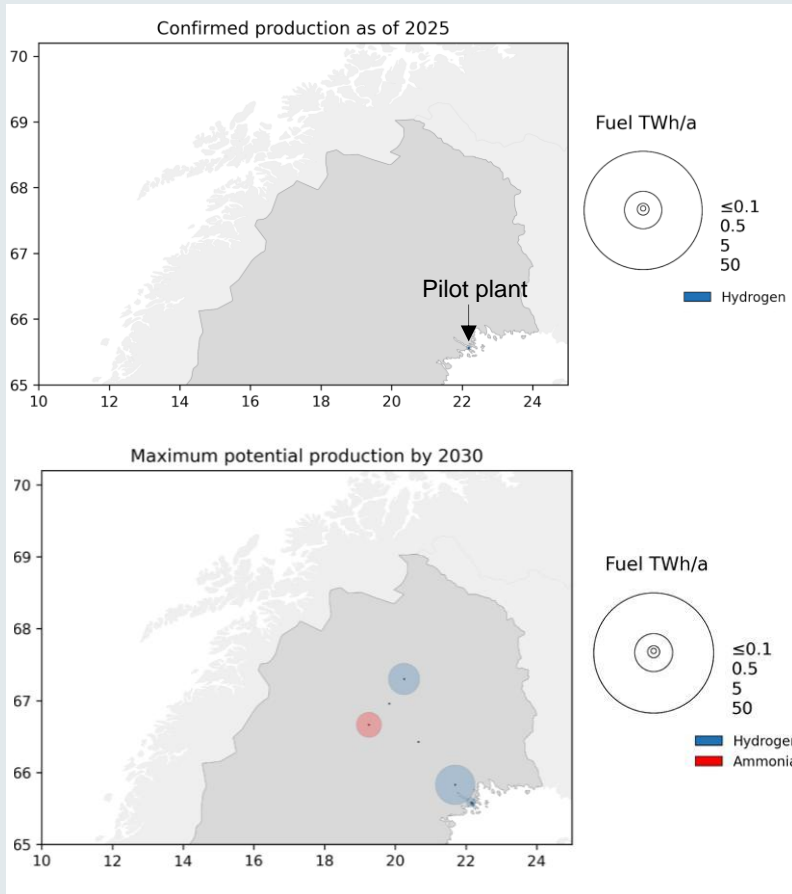
Electricity market uncertainty: The electricity market faces conflicting risks - low electricity prices threaten the profitability of new renewable energy projects (like wind power), while a sudden surge in industrial demand risks driving up regional electricity prices in Norrbotten significantly.

Geopolitical uncertainty: Ongoing global conflicts and wars are shifting overall political focus and resources away from sustainability, redirecting them toward immediate energy security and national defence.

"A lot of people say 'there is so much land in Norrbotten', but if we put all of these interests in relation to each other, there is not a lot of available land left."

"Right now the focus in discussions is geopolitical questions and defence. And that pushes questions around alternative fuels to the side."

Market analysis – Production capacity



Operational plants (above) and planned production plants by 2030 (below).

While the Baltic Sea Region has significant production potential (~338 TWh/year by 2030), electrofuel markets remain at an early stage. Only a few plants are operational, and many projects are paused due to high market uncertainty.

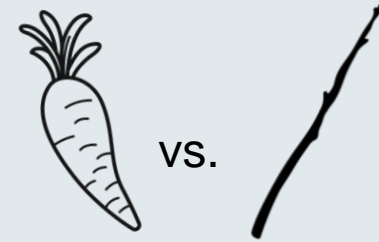
In Norrbotten, potential production capacity is estimated at 14.7 TWh, while current output is limited to one small pilot plant in Luleå (Styhre et al., 2025). Despite strong regional advantages, three key barriers must be addressed:

Fuel price gap: The large cost differences between conventional fuels and electrofuels limits demand, highlighting the need for policy support across governance levels.

Grid constraints: The regional electricity grid, much of it dates back to the 1970s, is heavily constrained. Although the region has a surplus of electricity production (total production 25 TWh (The Swedish Energy Agency, 2026)), the surplus is already allocated to planned industrial projects. This leaves limited room for new electrofuel production if all planned projects are realised. While some projects include electrofuel production, the volumes are expected to be used internally, with no surplus available for maritime use. This implies that the production focus is centered around heavy industry needs rather than electrofuel production for (maritime) transport.

Distribution infrastructure: There is currently very limited distribution infrastructure in the region, especially for hydrogen. This restricting production beyond on-site use. Expanding pipelines could be more cost-effective than grid expansion and reduce site competition.

Market analysis – Policy incentives



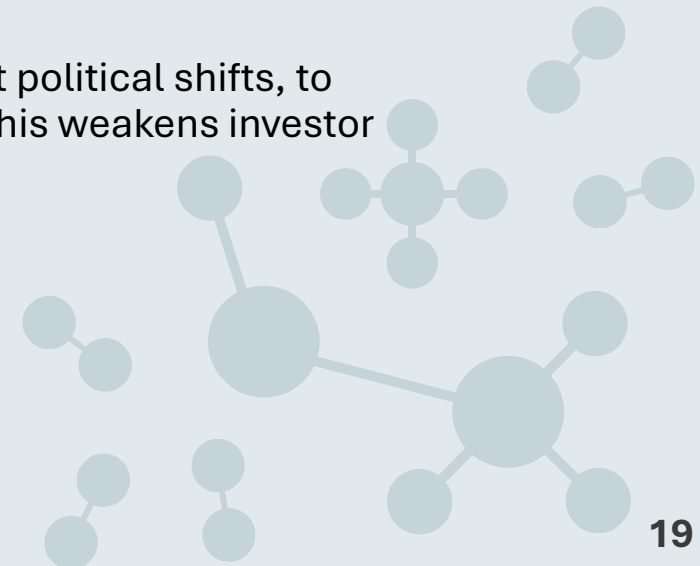
Overcoming weaknesses and threats requires strong policy incentives across governance levels, including national, EU and international level, along the entire electrofuel value chain, from production and infrastructure to vessel uptake. Current measures are insufficient, as reflected in limited production capacity and paused projects.

Interview and workshop participants emphasised the need for more ambitious and targeted policy support, particularly in three areas:

Financial support: Production support is needed at EU and national levels to bridge the price gap. Support for ship investments and higher operating costs is also critical to address the “chicken-and-egg” dilemma.

Risk sharing: Producers call for state or EU-backed guarantees to reduce financial risks during the initial ramp-up phase, inspired by models in Germany and Denmark.

Clear political direction: Sweden lacks a dedicated national hydrogen strategy, and recent political shifts, to prioritize for examples nuclear power and defence over sustainability, create uncertainty. This weakens investor confidence compared to more proactive countries such as Finland and Denmark.



Market analysis – Visions of the future

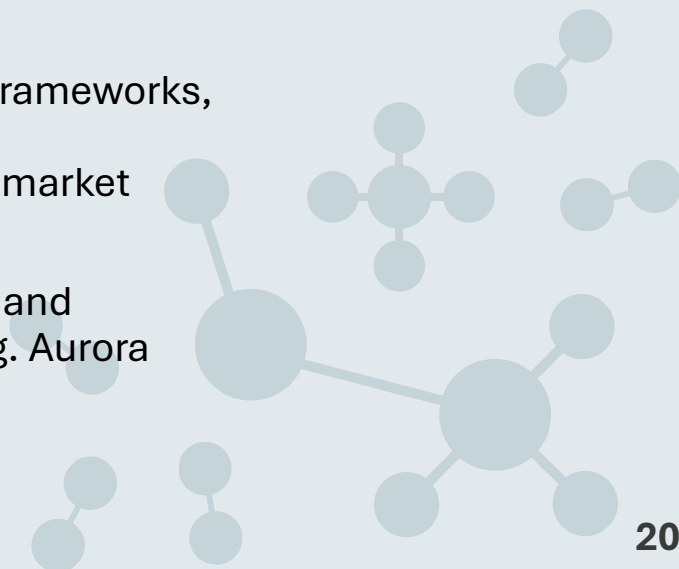
When discussing future outlooks, stakeholders expressed generally optimistic views on electrofuel development in Norrbotten:

Emerging green hub: Norrbotten has strong potential to lead the green transition, supported by access to fossil-free electricity, biogenic carbon dioxide, water and land, as well as strong regional ambition. Actors in the region have high sustainability ambitions and want to be part of solving climate change challenges through decarbonising heavy industry and developing fossil-free logistics chains. Electrofuel development is seen as key to maintaining industrial competitiveness. However, the lack of a clear national hydrogen strategy and clear political direction risk slowing progress compared to more proactive neighbours such as Finland and Denmark.

Potential synergies: Although currently planned electrofuel production is aimed for heavy industry, Norrbotten provides prerequisites for upscaling production – where a potential surplus of electrofuels could benefit the (maritime) transport sector.

Gradual market off-take: Market growth is expected to be driven by upcoming regulatory frameworks, including the EU’s emission trading scheme and increasingly stringent emission reduction requirements in the FuelEU Maritime regulation. These regulations are anticipated to drive market developments from 2035 onwards.

Infrastructure as a catalyst: Scaling up depends heavily on shared infrastructure. Recent and planned investments, such as regional hydrogen pipelines and electricity transmission (e.g. Aurora Line), are crucial to easing grid constraints and enabling production at optimal locations.



Conclusions

Mixture of renewable fuels: There will be no single "silver bullet" or dominant fuel. Instead, the future market will likely consist of a mix of different renewable fuels and hybrid solutions.

Strategic hydrogen opportunity, but early-stage deployment: Baltic Sea Region has strong potential as a hydrogen/electrofuel hub (with planned capacities ~338 TWh by 2030), but deployment remains very early and for industry rather than shipping (~2% operational). In Norrbotten County, the potential production capacity is 14.7 TWh.

Maritime sector as early driver: Customer demand for green shipping can drive market development in the region and beyond, but the market is constrained by uncertainty and limited readiness.

Risk of a "Chicken-and-Egg" Dilemma: The electrofuel market is currently stalled by mutual hesitation delaying market off-take agreements, and investments are hindered by uncertainties surrounding both supply/demand and the overall political direction.

Need for stable regulations/policies and cooperation: A successful scale-up depends on implementation of stable long-term global, EU and national regulations, risk-sharing mechanisms, and cross-border infrastructure collaboration.

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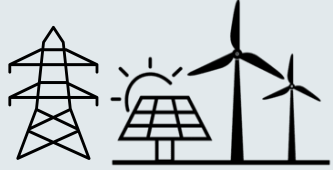
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Appendix: Interviews and workshop participants

Renewable electricity production

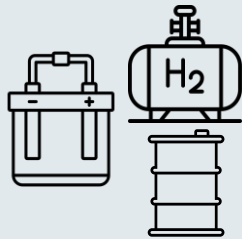


12 Interviews, 30-120 min each ⁽¹⁾
1 workshop, 3 h with 24 participants ⁽²⁾

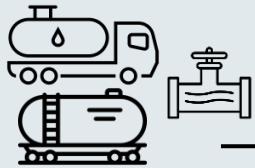
Biogenic carbon dioxide



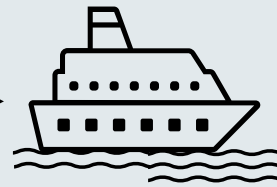
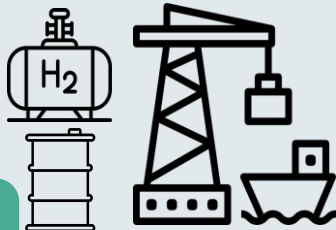
Electrofuel production



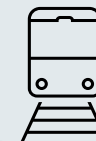
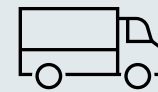
Distribution infrastructure



Port infrastructure



Low and zero emission transport



Technology providers
Energy companies
Energy suppliers

Vattenfall^{1,2}
Uniper^{1,2}

The Swedish National
Transmission Operator¹
Nordion Energi^{1,2}

Energy infrastructure provider
Rail and road transport provider

The port authority
Port management
Terminal operators
Stevedoring

Port of Luleå^{1,2}
Port of Piteå^{1,2}
Port of Skellefteå²
Shorelink¹

Bunker companies

No bunker
companies in the
region

Shipping companies

Statistical data
collected through
desktop research

Rail and road
transport provider

Out of scope for the
project focus

Cargo owners/
Shippers

LKAB¹
SSAB¹

Authorities and decision makers

Maritime commissions
Flag State
The IMO
The EU
Local authorities

Other notable groups

Financial institutions
Non-governmental organisation
Labor unions and workers' representatives
Trade associations
Training institutions
Research and academic institutions

County Administrative Board of Norrbotten¹
Norrbotten Chamber of Commerce¹
Region Norrbotten²
Luleå Municipality²

IVL Swedish Environmental Research Institute
Lindholmen Science Park
LTU Business

Charterers
Shipping agents
Cargo brokers
Freight forwarders