



# What's happening in the Med area? The new maritime phenomena

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La Spezia, 16<sup>th</sup> of October 2019

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# A new observatory: a permanent analysis on ports and shipping

## News

**Save the date | Il Porto di Taranto. Un'analisi del mercato captive e del mercato contestabile**

Si terrà a Taranto, il prossimo 7 ottobre presso il Castello Aragonese di Taranto la presentazione del working paper: "Il Porto di

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Siamo lieti di rendere disponibile sul nostro sito la Nota Congiunturale sul Trasporto Merci (Gennaio-Giugno 2019) elaborata dal Centro Studi del nostro

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Continuano gli appuntamenti di Intesa Sanpaolo dedicati all'Economia del mare. Il convegno, organizzato in collaborazione con SRM e Autorità di Sistema Portuale

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SRM ha partecipato al workshop "Connectivity in the Alpine Region: Focus on Intermodality of Transport Systems and Maritime Dimension" che si è

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**6° Rapporto annuale Italian Maritime Economy | Nuovi scenari nel Mediterraneo: Suez e la Cina, le strategie dei grandi carrier, le nuove tecnologie e le rotte dell'energia**

Sostieni i nostri progetti di ricerca, registrati e acquista il rapporto

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# The growing role of *Mediterranean*



The **Mediterranean Economic Scenario**  
and competitiveness indicators



The **main phenomena** that will shape the  
future of the maritime sector

# The most important data on the shipping sector in the Med

4

**27%  
WORLD'S  
CONTAINER  
LINER  
SERVICES**

**19 PORTS  
THROUGHPUT  
>1 MLN TEUs**

**+514%  
GROWTH OF  
CONTAINER  
TRAFFIC SINCE  
1995**

**83%  
SHARE OF  
SEABORNE TRADE  
BETWEEN ITALY  
AND THE MED**

**983 mln  
tonnes  
SUEZ CARGO  
TRAFFIC**

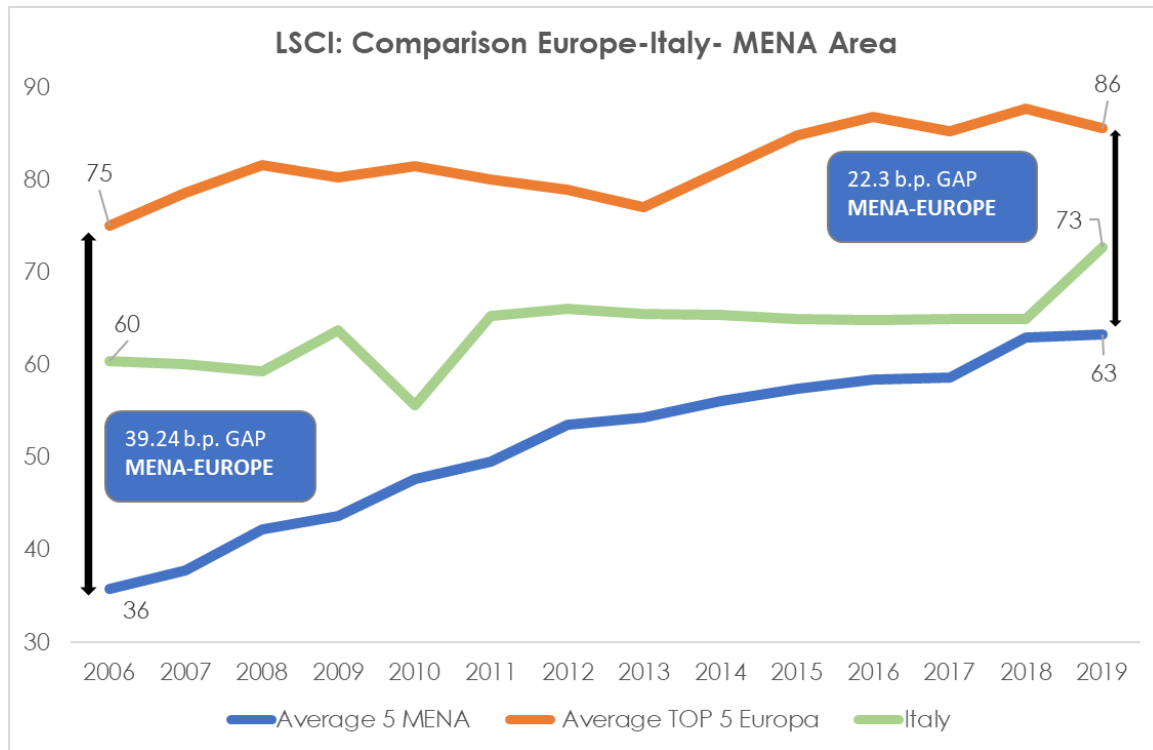
**614 mln  
tonnes  
SHORT SEA  
SHIPPING**

**20%  
GLOBAL  
SHIPPING  
TRAFFIC**

# The MENA Area is increasing its competitiveness

5

- The gap between the MENA and European has greatly reduced between 2006 and 2019.
- Even the gap with Italy is shrinking.



TOP 5  
MENA

Egypt,  
Morocco,  
Saudi Arabia,  
Turkey, UAE

TOP 5  
EUROPE

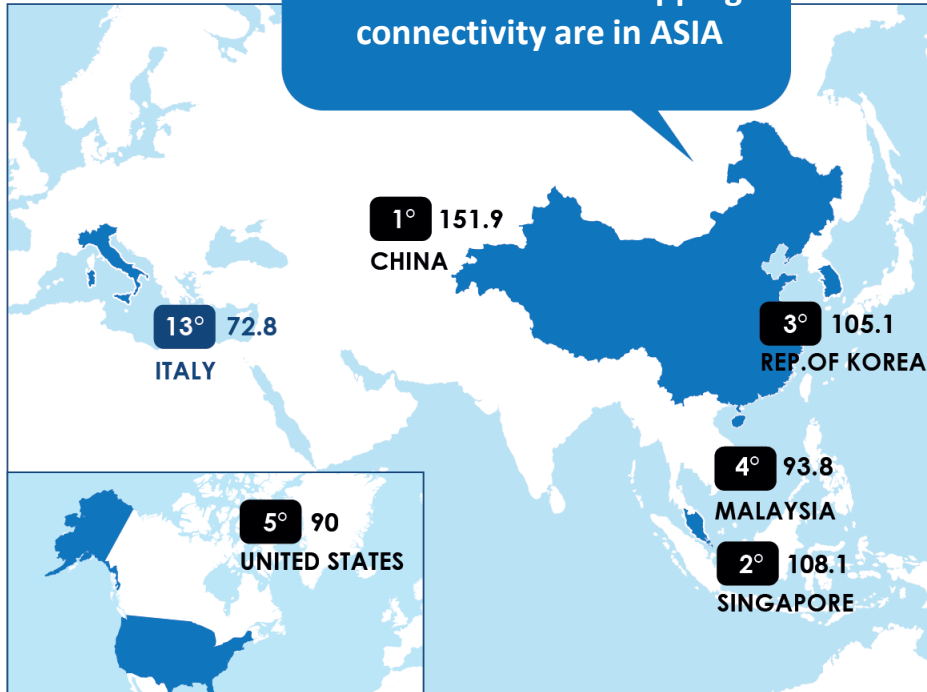
Belgium,  
Germany,  
Netherlands,  
Spain, UK

Source: SRM on UNCTAD

# In this scenario logistic efficiency and connectivity are the new challenges in international maritime competitiveness

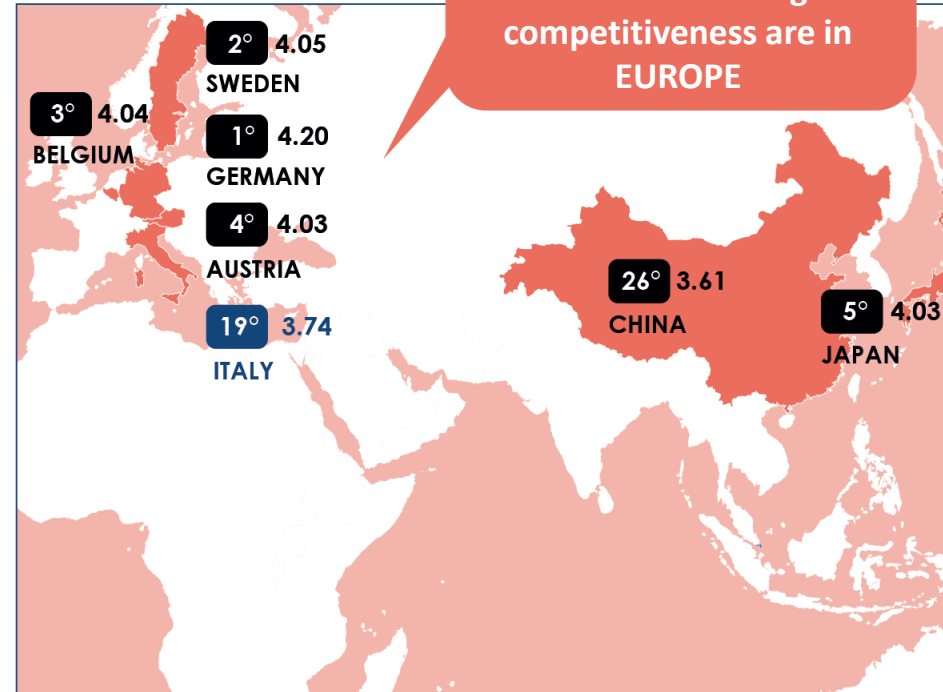
## LSCI

The top 4 countries of the world in terms of shipping connectivity are in ASIA



## LPI

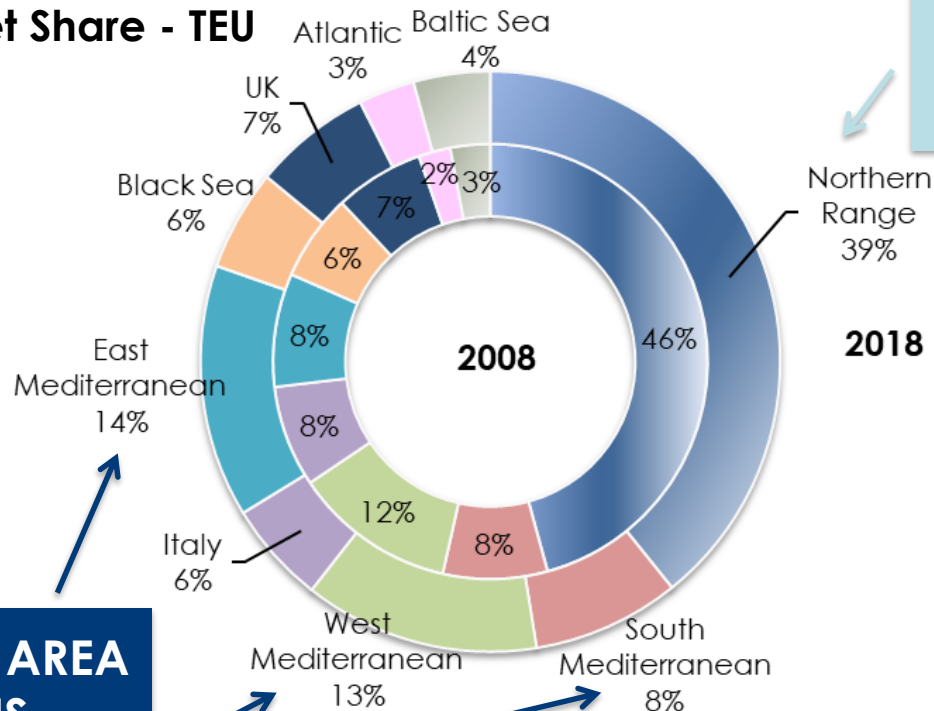
The top 4 countries of the world in terms of logistic competitiveness are in EUROPE



# The analysis of container ports by geographic area: the new role of Med

7

## Market Share - TEU



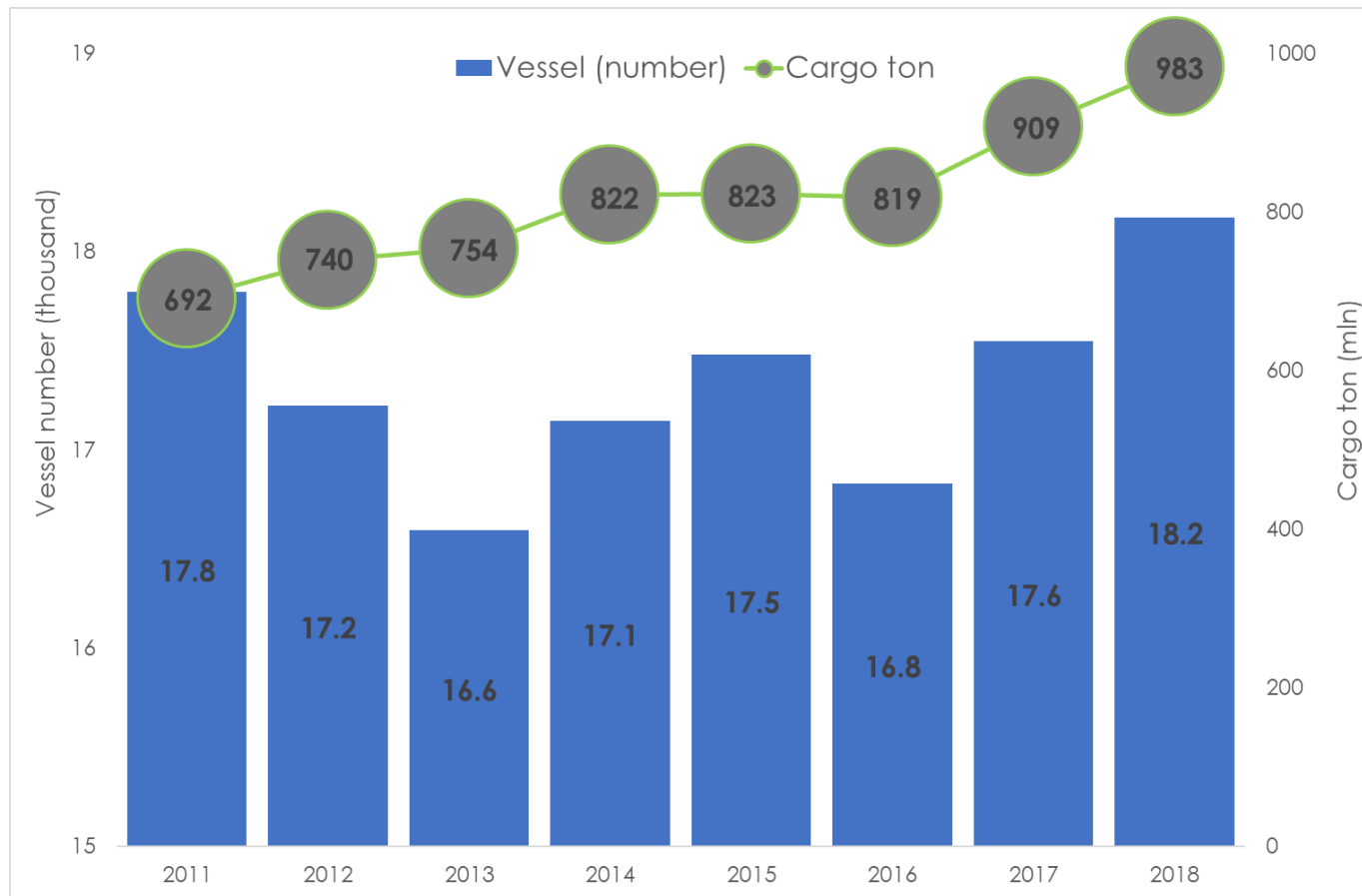
**NORTHERN  
RANGE IS  
SLOWING DOWN**

- **Northern Range** market share (39%) is decreased between 2008 and 2018.
- The **MED Area** can be a great opportunity; between 2008 and 2018 the ports of MED Area increased their market share from 36% to 41%.

**MED AREA  
IS  
GROWING**

Source: SRM on Port Authorities

# The Suez Canal: the new records

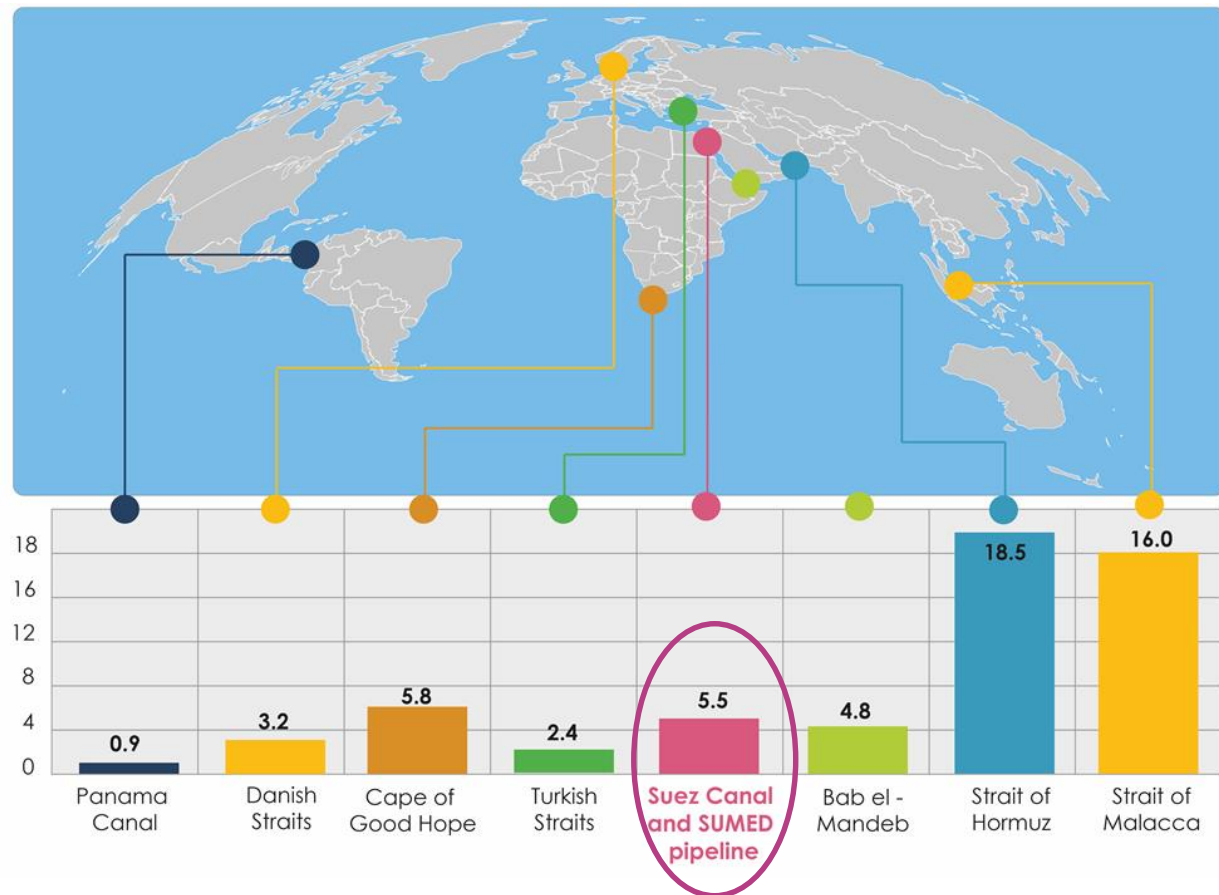


Source: SRM on Suez Canal Authority, 2019



# Main oil global chokepoints

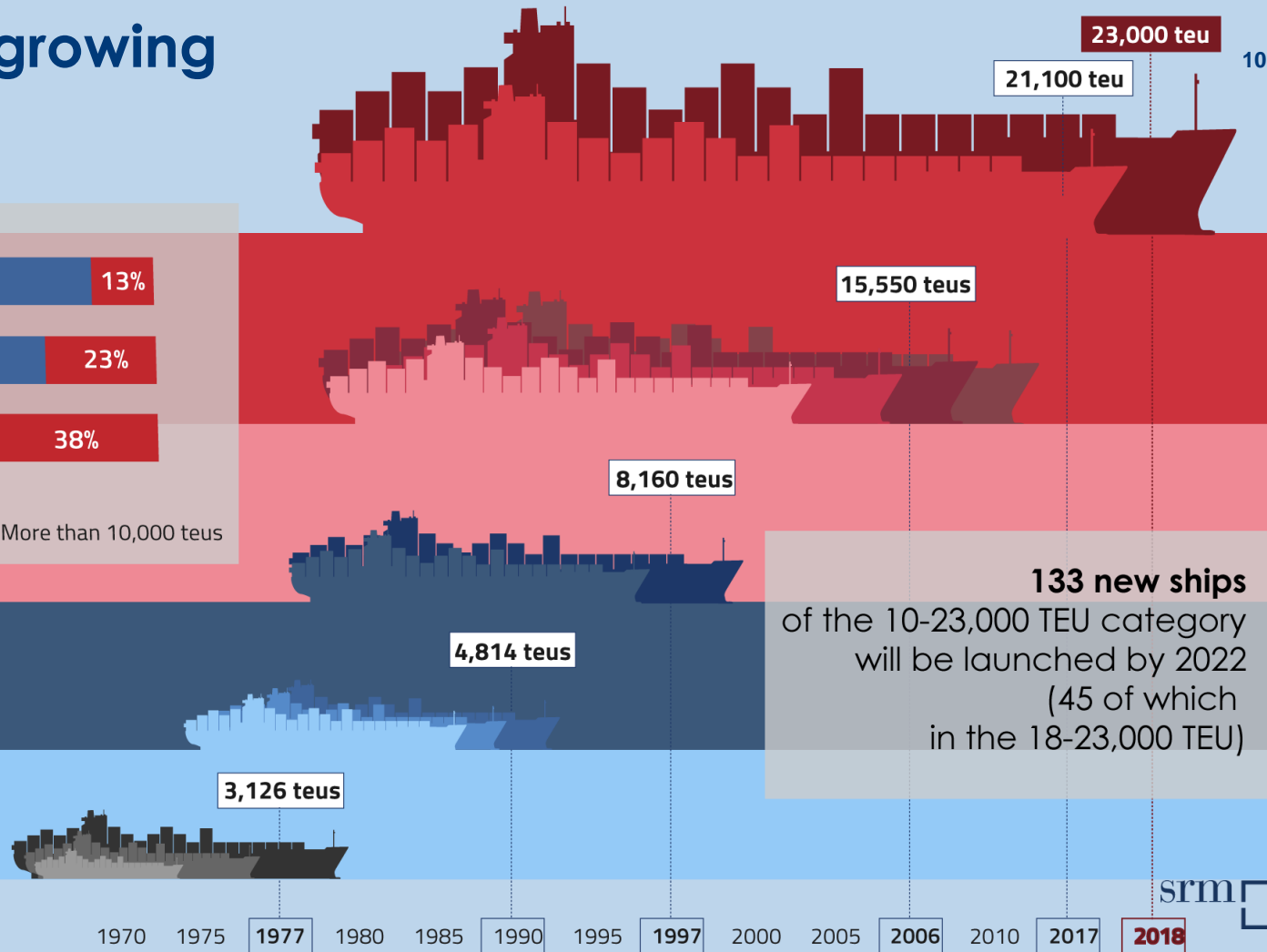
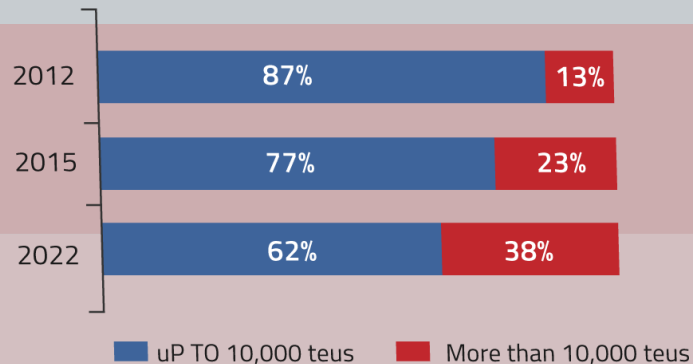
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■ **Suez** (and the Sumed pipeline) was the **3rd** transit route in the world for the transport of crude oil and petroleum products with 5.5 million barrels per day.

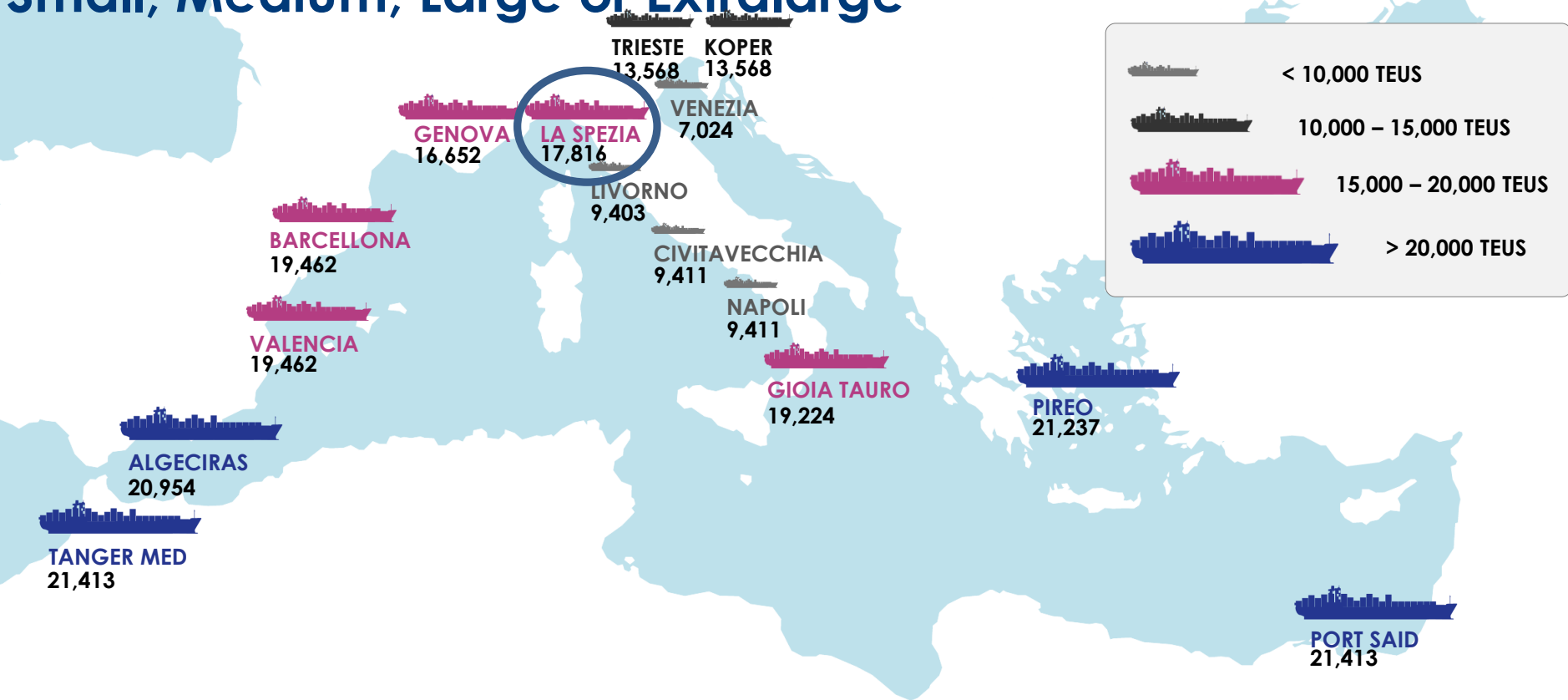
■ It amounts for 9% of global oil trade and **LNG**.

# Ship Sizes are growing



# The size of the Megaships in the Mediterranean ports: Small, Medium, Large or Extralarge

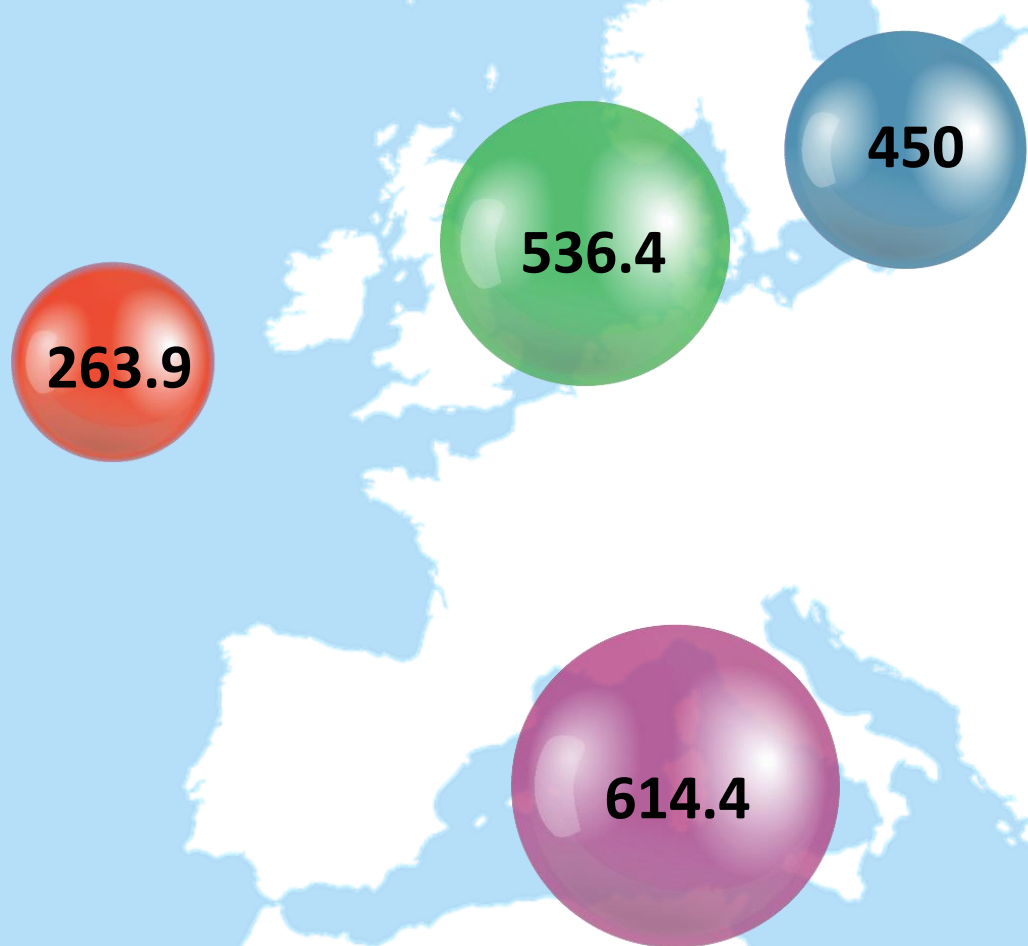
11



Source: SRM

# Med is a strategic area for Short Sea Shipping

12



■ Goods transported as part of **EU short sea shipping** are almost **1.9 billion tonnes**

■ **Short sea shipping** made up close to **60% of the total** sea transport of goods to and from the main EU ports

**136.2**

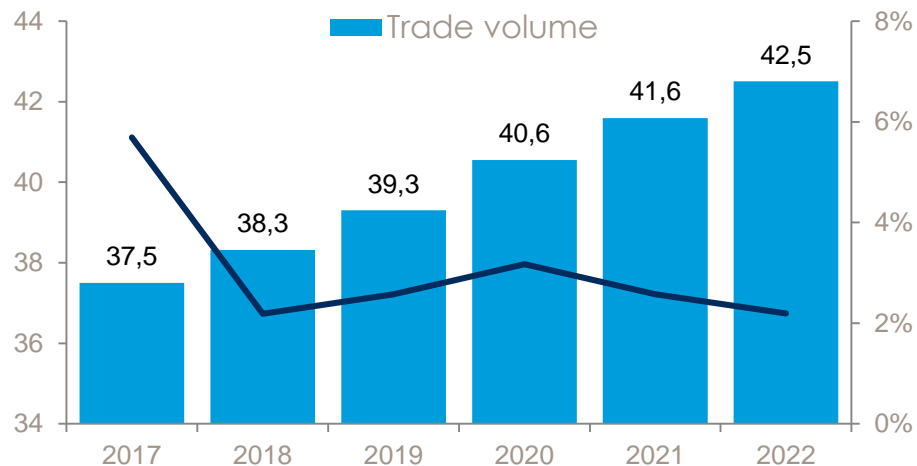
■ For SSS, especially in Europe, **Roll-on Roll-off (RoRo)** is almost equally important as container shipping

*Data in million tonnes*  
Source: SRM on Eurostat

# Vehicle exports continue to rise

13

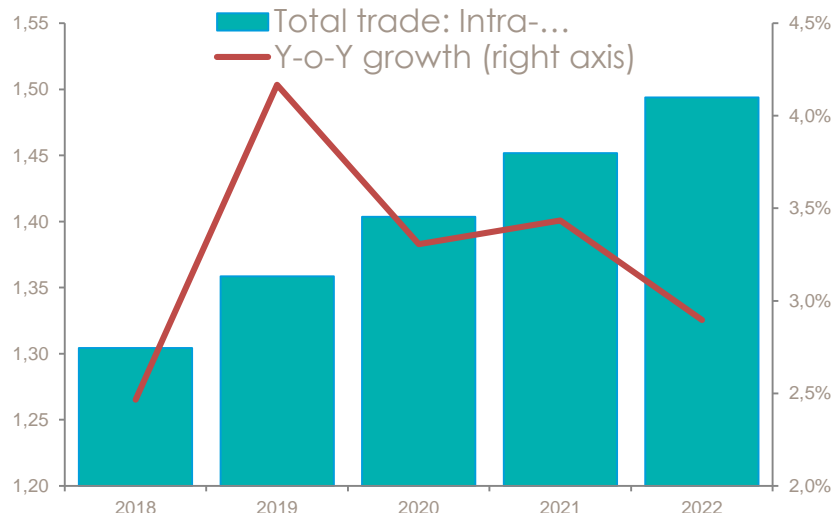
FORECAST GLOBAL SEABORNE VEHICLE TRADE VOLUMES  
(MILLION CEU- Car Equivalent Unit). 2017-2022



■ Car carrier seaborne volume **growth rate is 2.5% a year to 2022.**

■ Most growth is forecast to continue to come from short-distance **Intra-Asian trade(+4,2% annual growth)** , as well as **Asia to Europe(+2,7%)**

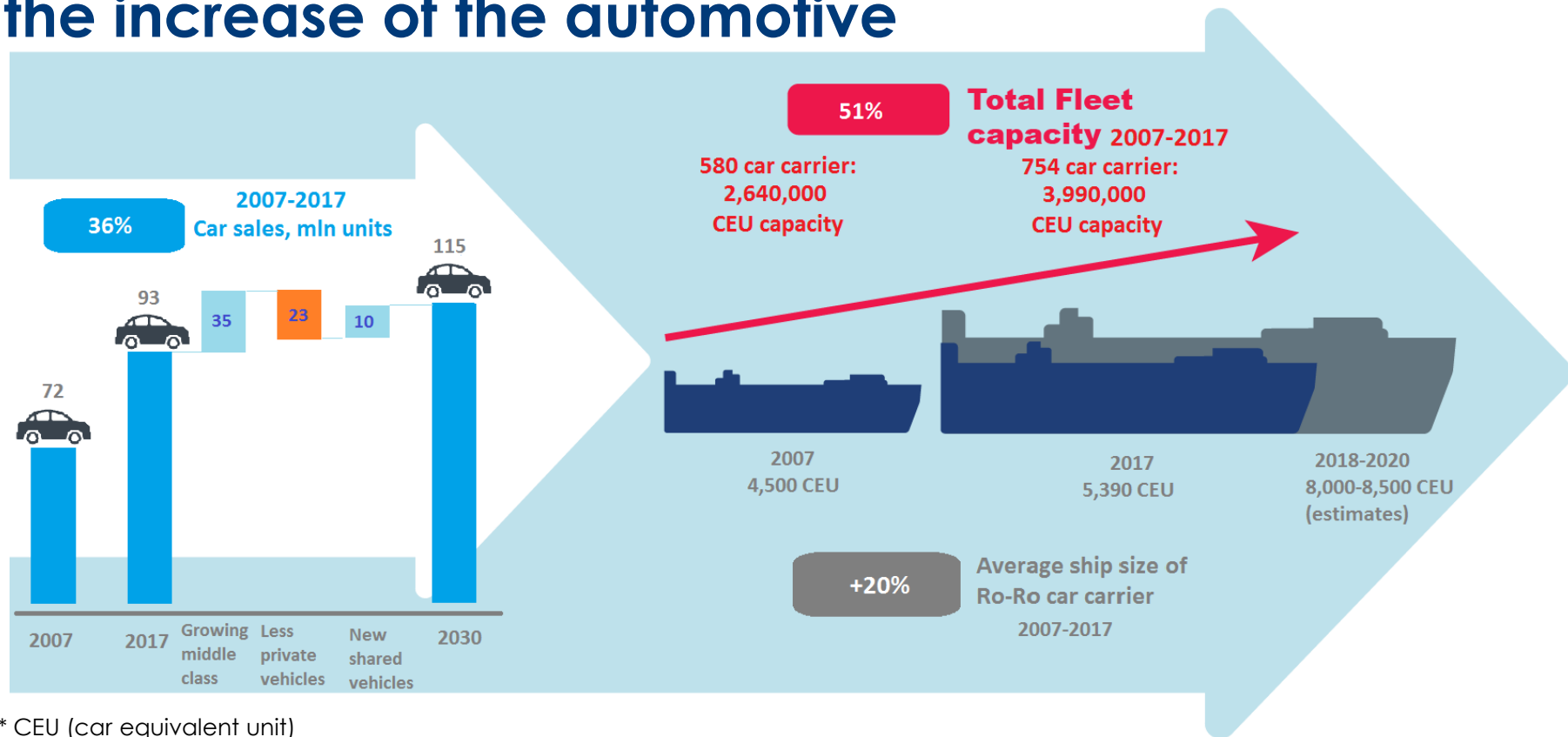
FORECAST INTRA-MEDITERRANEAN VEHICLE TRADE VOLUMES 2018-2022 (MILLION CEU)



■ To 2022 **Intra-med** trade shows a **growth (3.3%)**

■ ...thanks to **Morocco** that is becoming a major car producer (33% of the Intra-Med).

# The connection between the growth of Ro-Ro and the increase of the automotive 14



\* CEU (car equivalent unit)

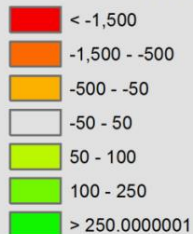
\* Source: SRM on WWL, BRS Group, ANFIA, Fearnleys

# Ro-Ro traffic in the Mediterranean Sea

## Ro-Ro density map – 2012-2017 comparison

### Ro-Ro - 2012-2017 comparison

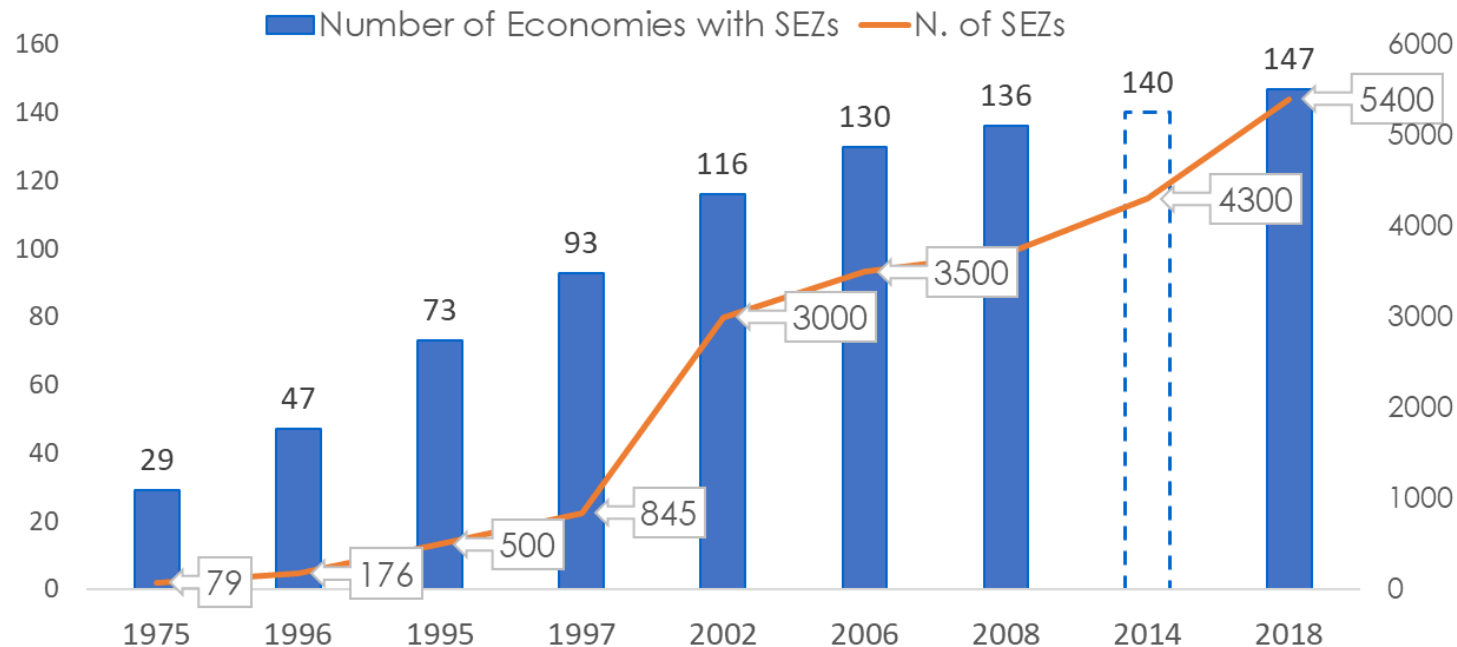
#### Number of vessels



0 250 500 750 1,000  
Kilometers

# Free Zones are growing...

16



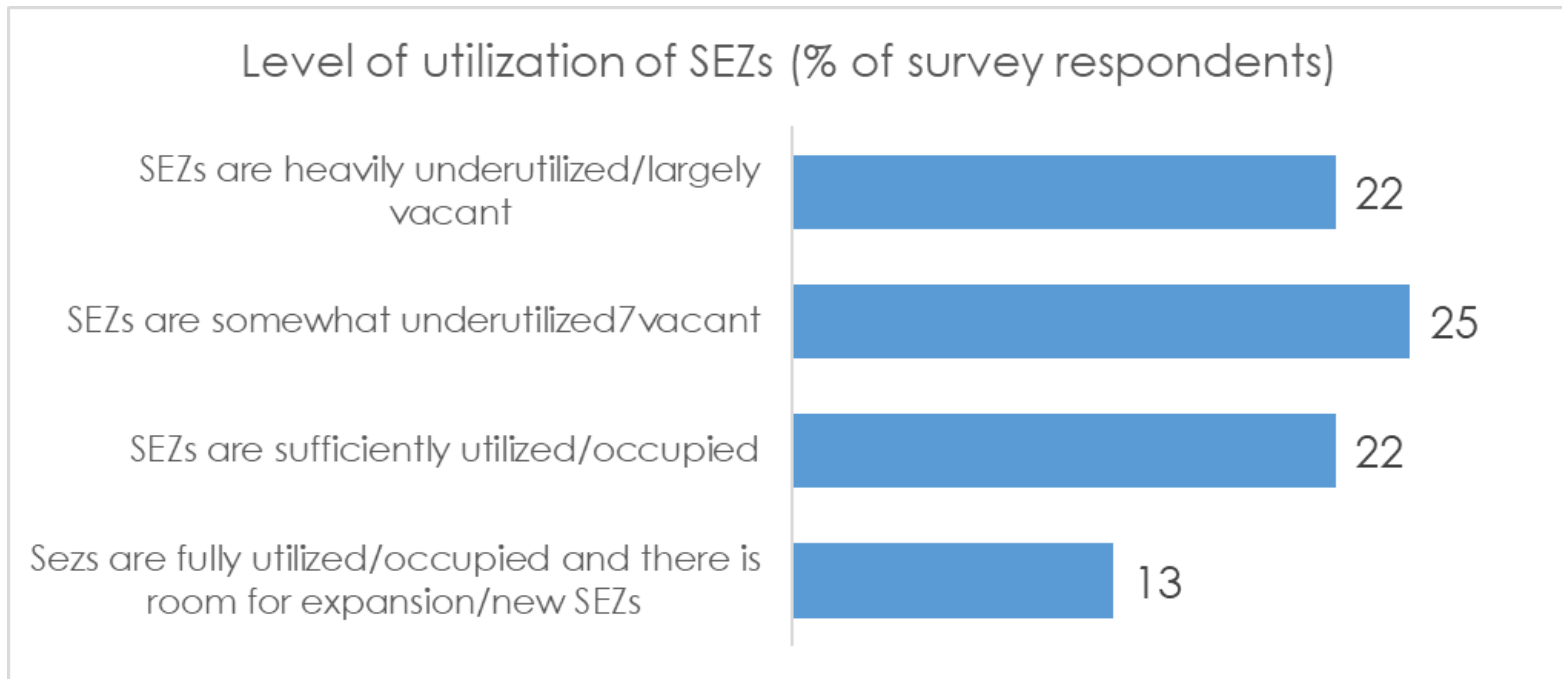
Source: SRM on UNCTAD 2019

□ Free Zones employ between **90 and 100 million direct workers**



# Free Zones not everywhere are successful: level of utilization

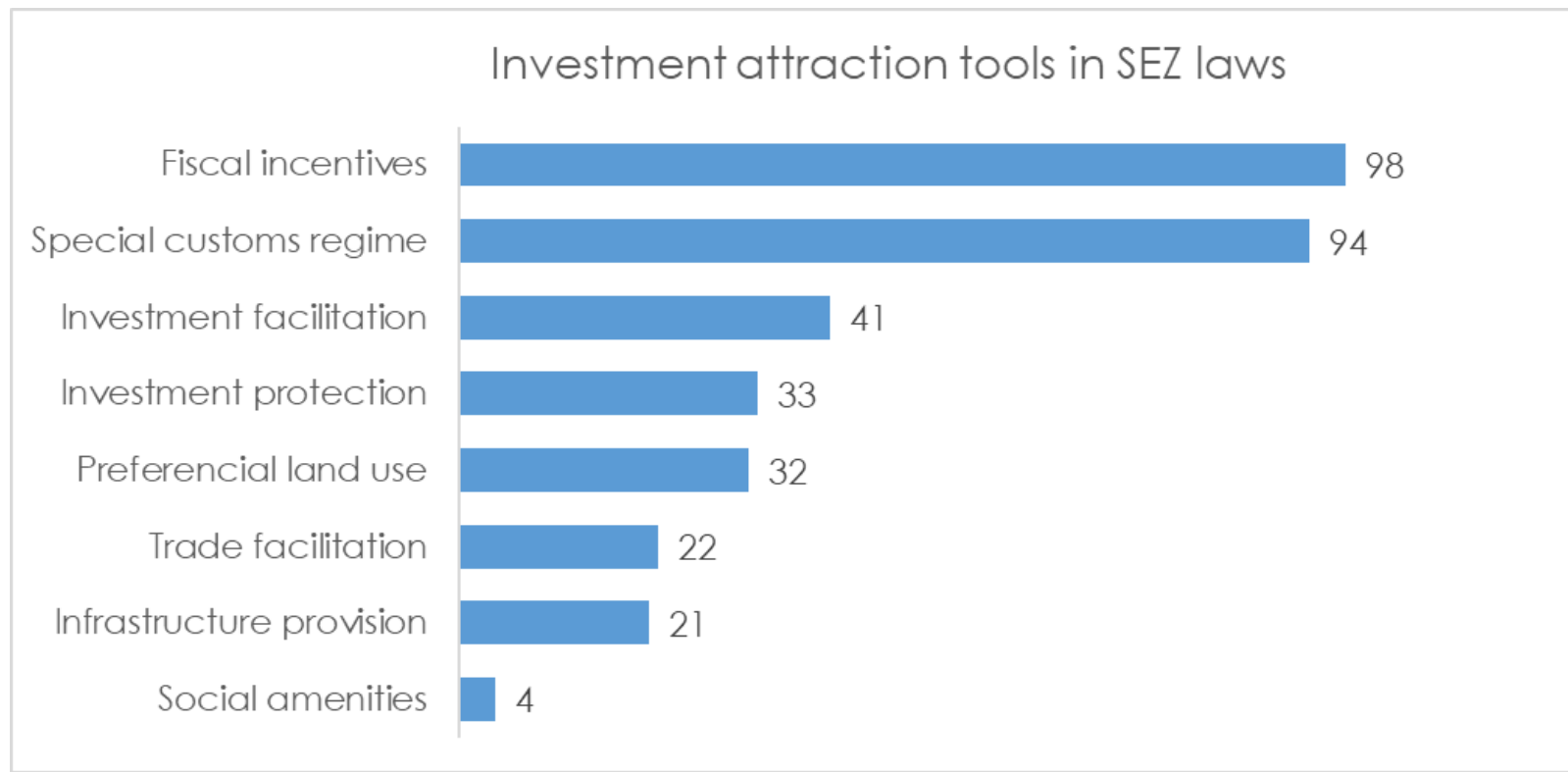
17



Source: UNCTAD Investment Promotion Agencies Survey.

# How to attract investments in the SEZs

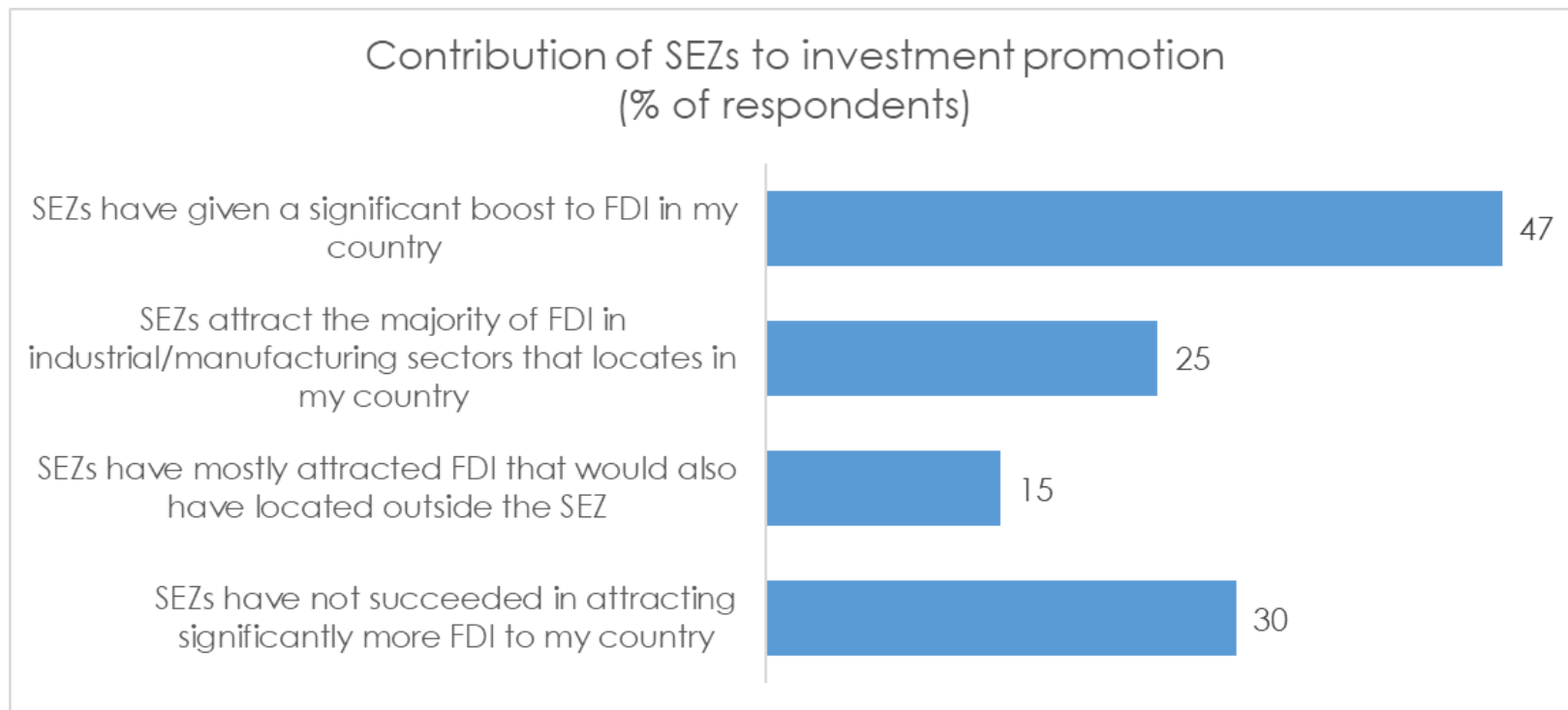
18



Source: UNCTAD Investment Promotion Agencies Survey.

# Direct and indirect economic contributions of SEZs

19



Fonte: SRM su UNCTAD, 2019

# Italian Free Zones: SEZ basic criteria



Southern Italian regions



Including at least one port area



Incentives for investments



Tax and duty advantages and reduction of bureaucracy



Strategic Development Plan



Special agreements with banks



Management Committee

 ZES

 ZES INTERREGIONALI



# PORT 6.0



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- ▶ Department for international development
- ▶ Monitoring of international trade



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- ▶ Plan for territorial development and attraction of investments
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## SUSTAINABILITY

- ▶ Creating economic and social value and realising sustainable growth



**Thank you for your attention**

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