



Analysis of the Italian Maritime Economy

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Leghorn, 23rd May 2019

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A new observatory: a permanent analysis on ports and shipping

News

SRM partner of the 2018 Dialogue of Continents Forum | Paris 3-5 September

SRM is partner of the 2018 Dialogue of Continents Forum. The event is organised by the Reinventing Bretton Woods

Geo-strategic scenarios of Italian ports in the Mediterranean | Assoport | Rome, 19 July

On Thursday 19th July the Association of the Italian Ports presented a study on Geo-strategic scenarios of Italian ports in the Mediterranean

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Italian Excellence: The Ro-Ro sector | Article in "Porti campani in RETE" magazine

Italian Excellence: The Ro-Ro sector. This is the title of the analysis written by Alessandro Panaro, Head of "Maritime & Mediterranean Economy"

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Network and Infrastructure | Confartigiano Conference | Bari, 13th July

On 13th July SRM will be speaker at one of the conference organized by Confartigianato in anticipation of the 2018 Mezzogiorno Convention

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Italian Maritime Economy. China, energy corridors, ports and new routes: geomaps of a changing Mediterranean

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The growing role of Mediterranean

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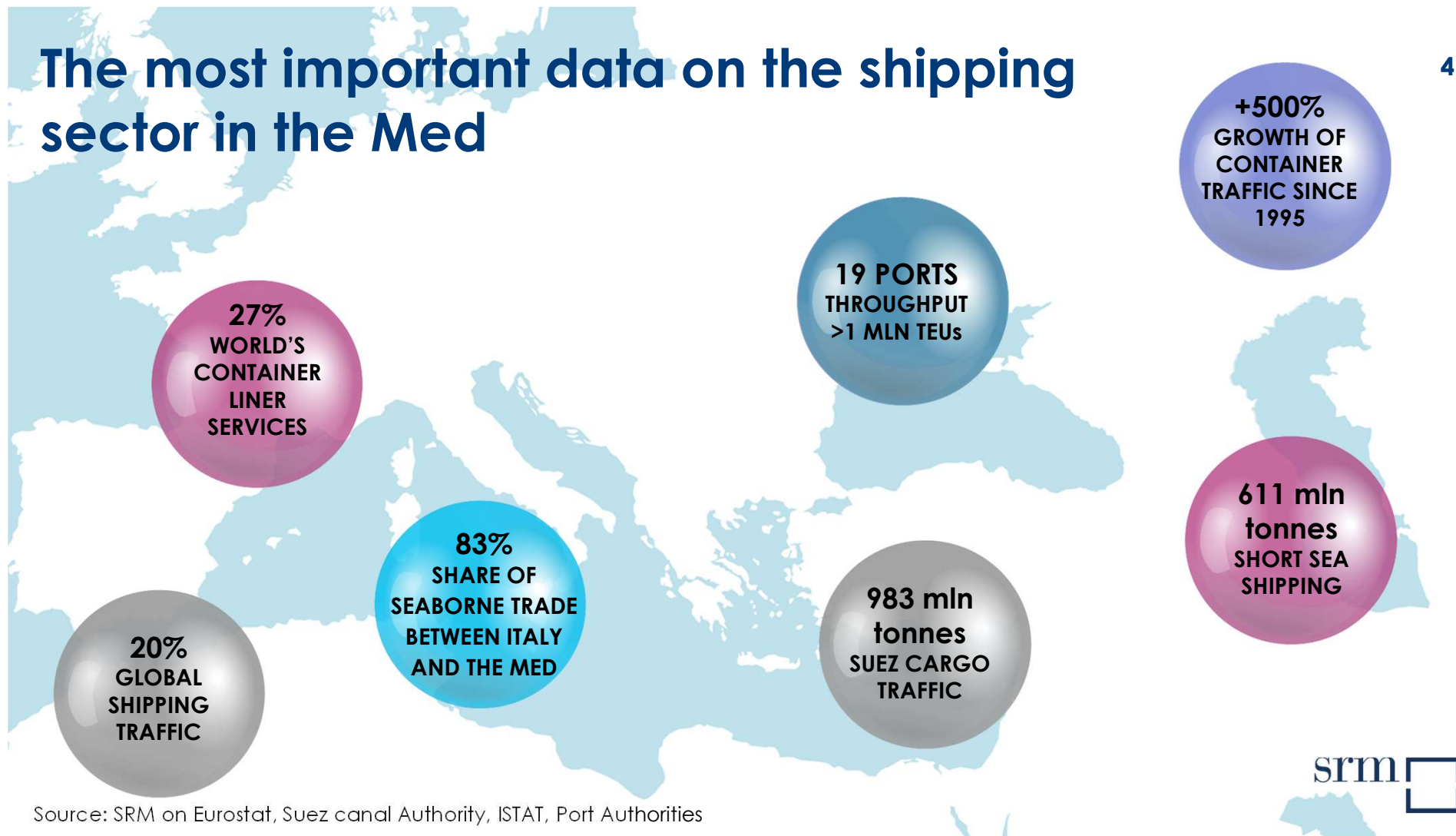
The **Mediterranean Economic Scenario**
and competitiveness indicators



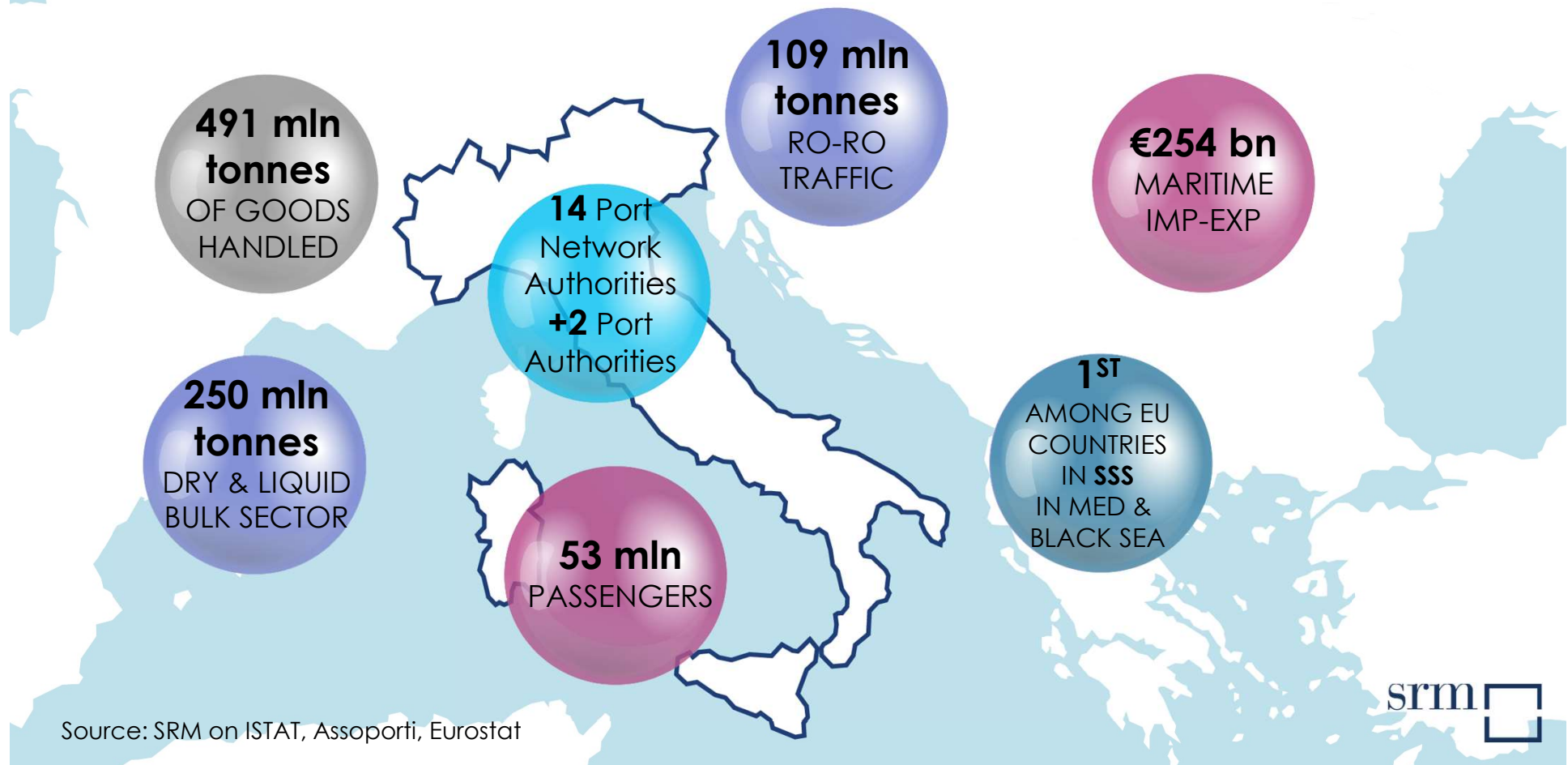
The **main phenomena** that will shape the
future of the maritime sector

The most important data on the shipping sector in the Med

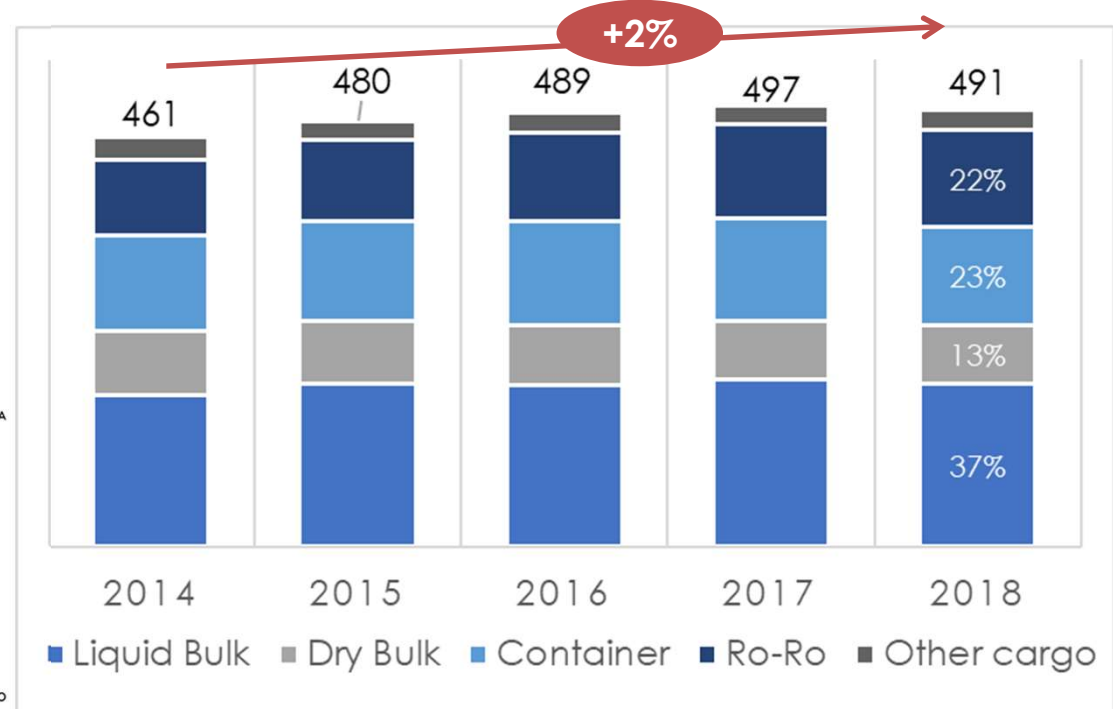
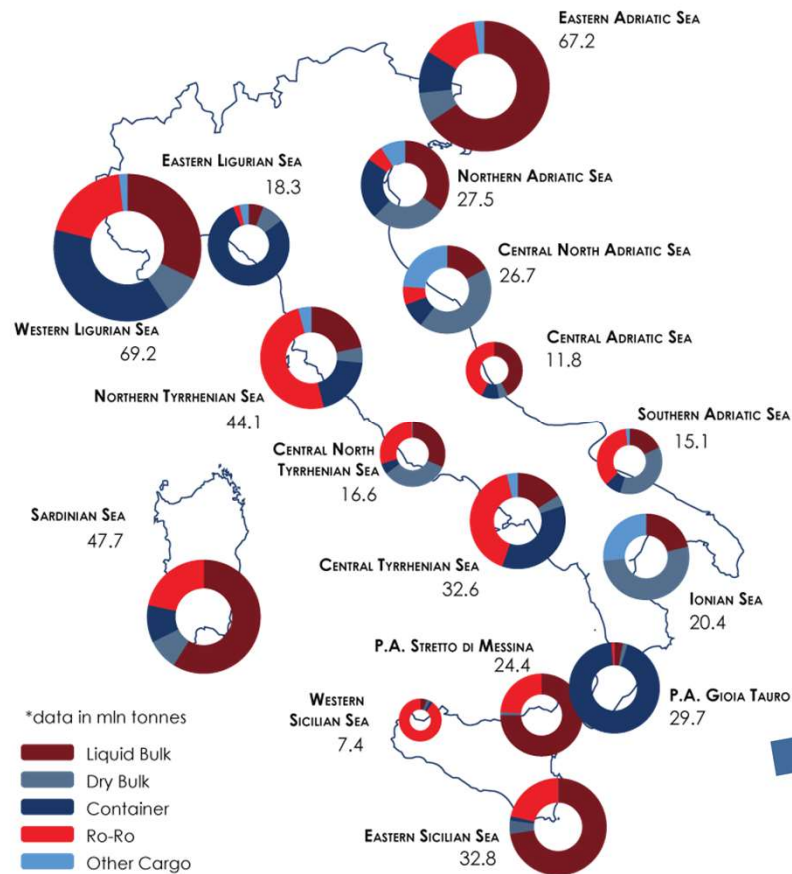
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Main ports & Shipping statistics in Italy



Analysis of Italian ports performance

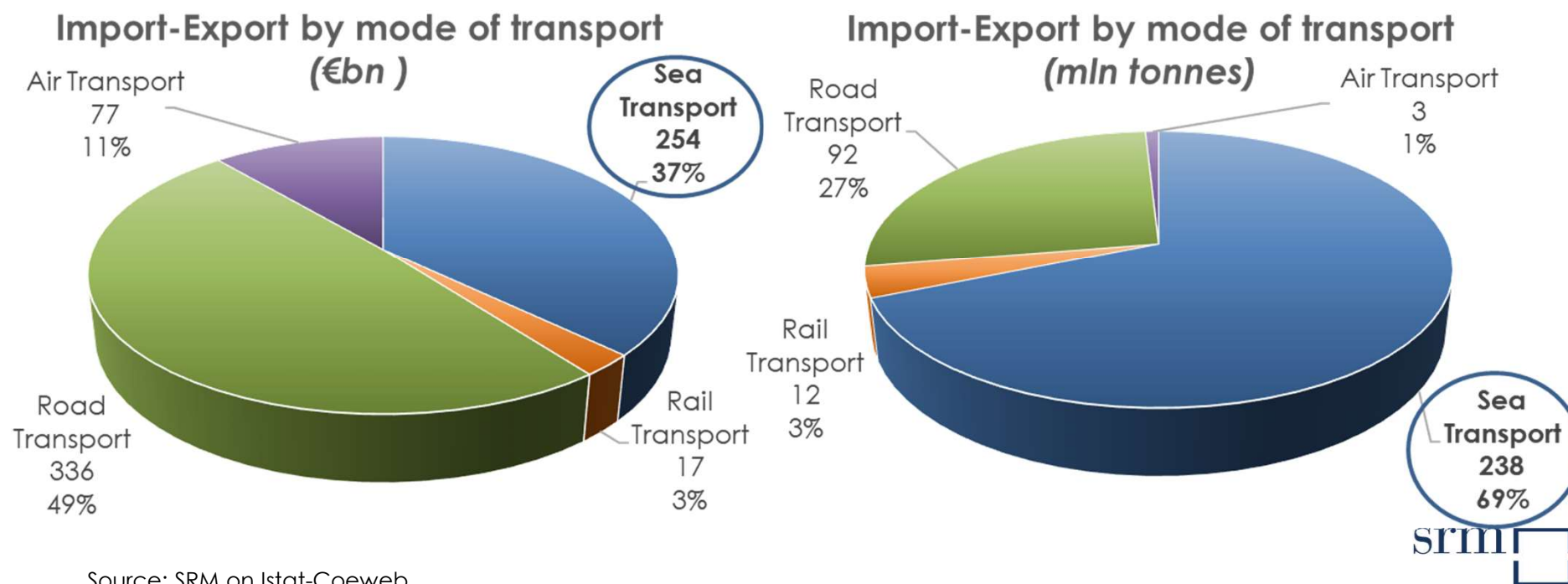


■ **Ro-Ro with a volume of 109 mln tonnes (+3% on 2017) realized the best performance.**

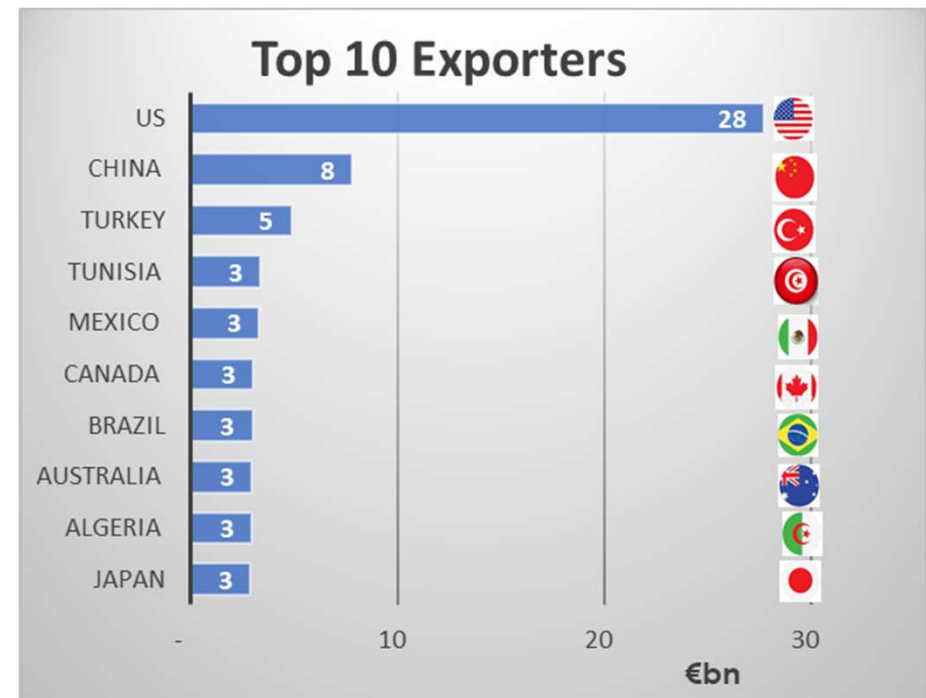
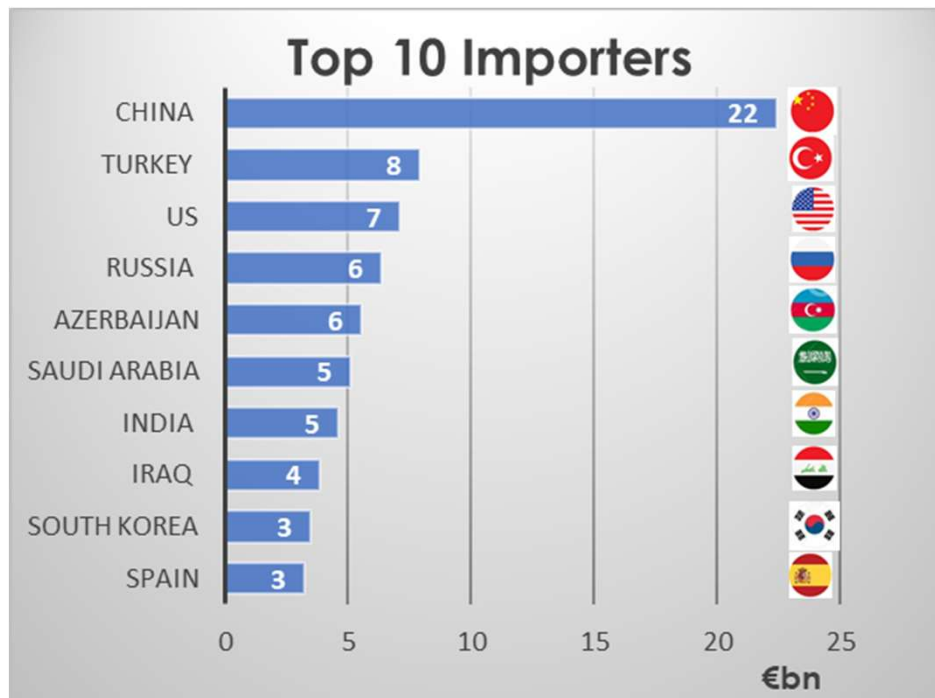
The Italian maritime trade

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- **Seaborne trade** in our country **is worth €254 bn**; over a third of Italy's import-export is carried out by ship
- In terms of **quantity**, trade by sea reached 69% of total traffic equal to **238 mln tonnes**
- **Maritime transport is clearly the most significant.**



The Italian maritime trade partners

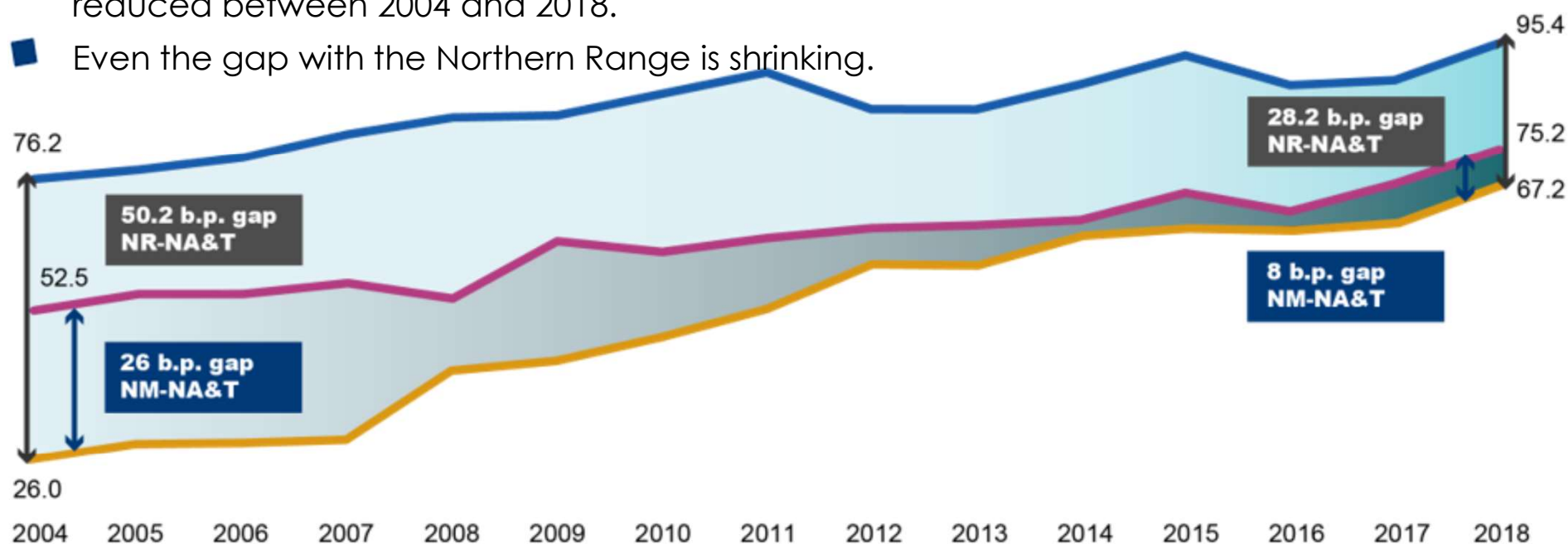


2018 data
Source: SRM on Istat-Coeweb

The MENA Area is increasing its competitiveness

9

- The gap between the ports of the South and the North of the Mediterranean has greatly reduced between 2004 and 2018.
- Even the gap with the Northern Range is shrinking.

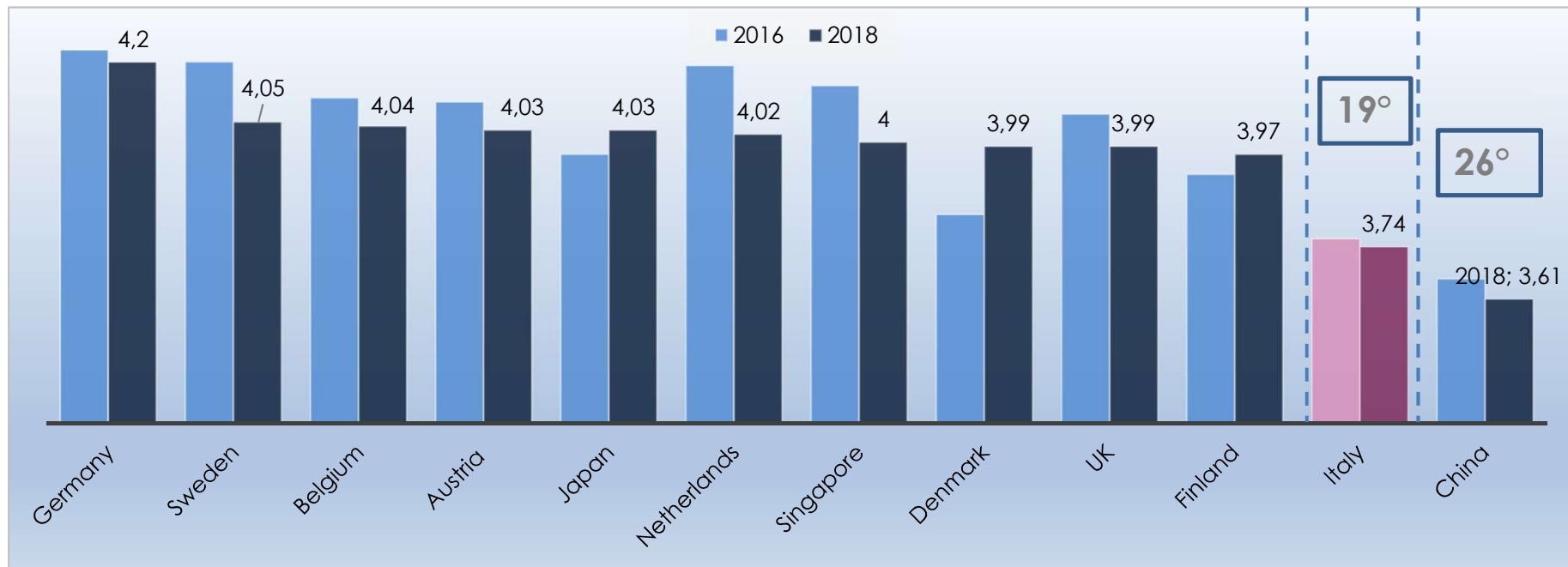


Source: SRM on Unctad

Average NR	Northern Range (Germany, Netherlands, Belgium)
Average NM	North Mediterranean (Spain, France, Italy, Greece)
Average NA & T.	North Africa & Turkey (Morocco, Egypt, Turkey)

Logistic Performance Index

10



Source: SRM on World Bank

□ **Italy** ranks **19°**; **China** hold the **26°** place in the world

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

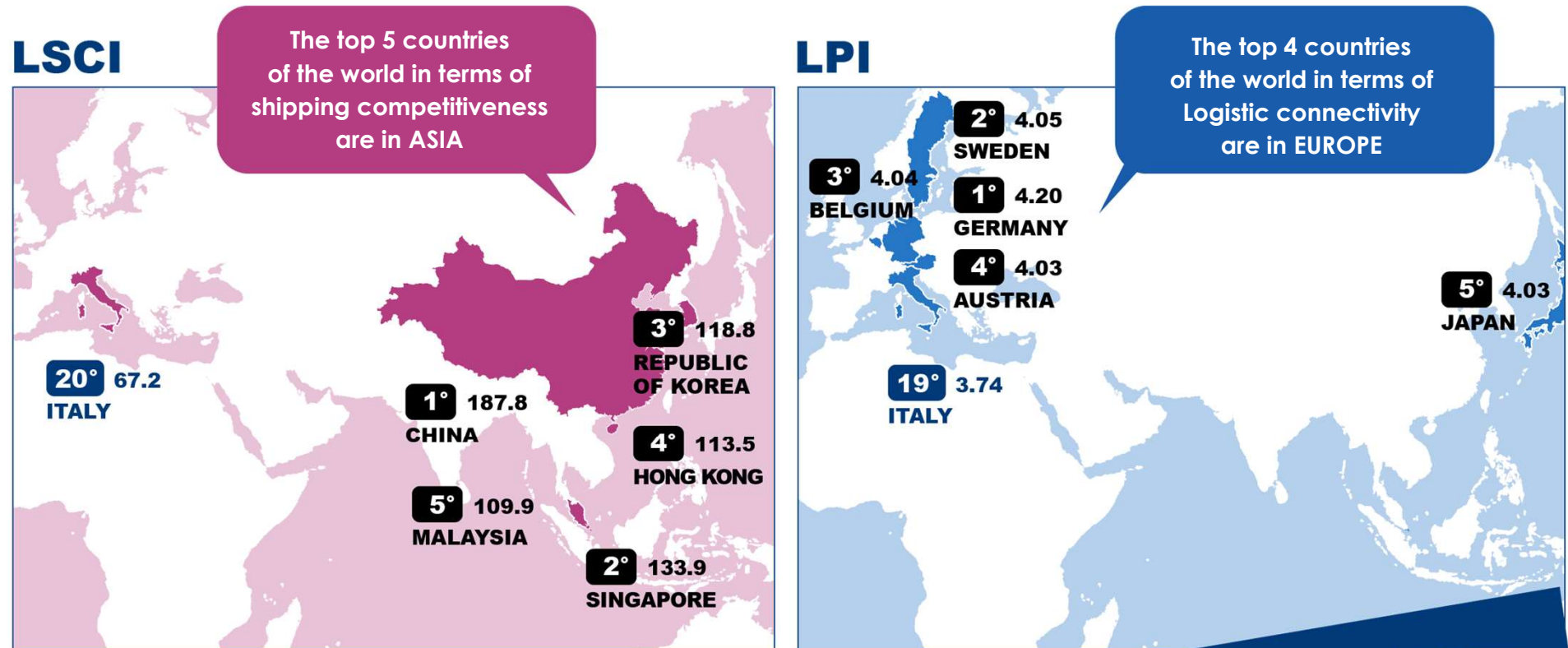
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Source: SRM on Unctad

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

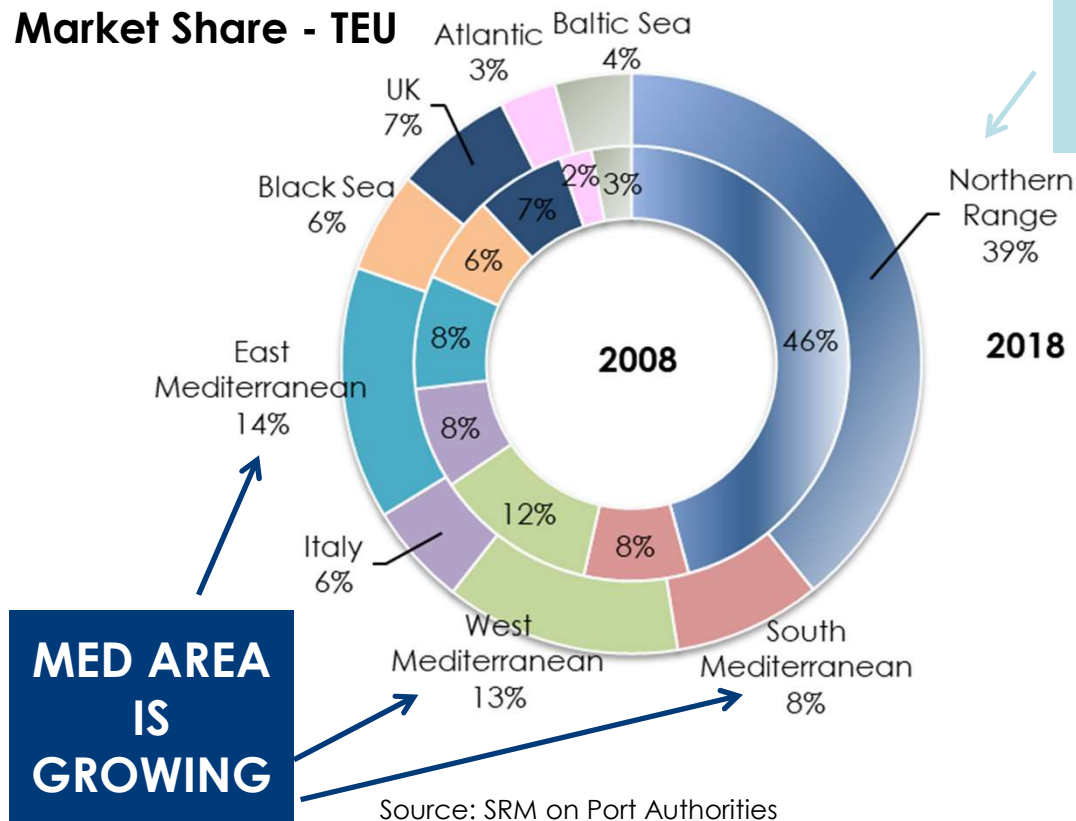
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Source: SRM on WB and Unctad

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

Market Share - TEU

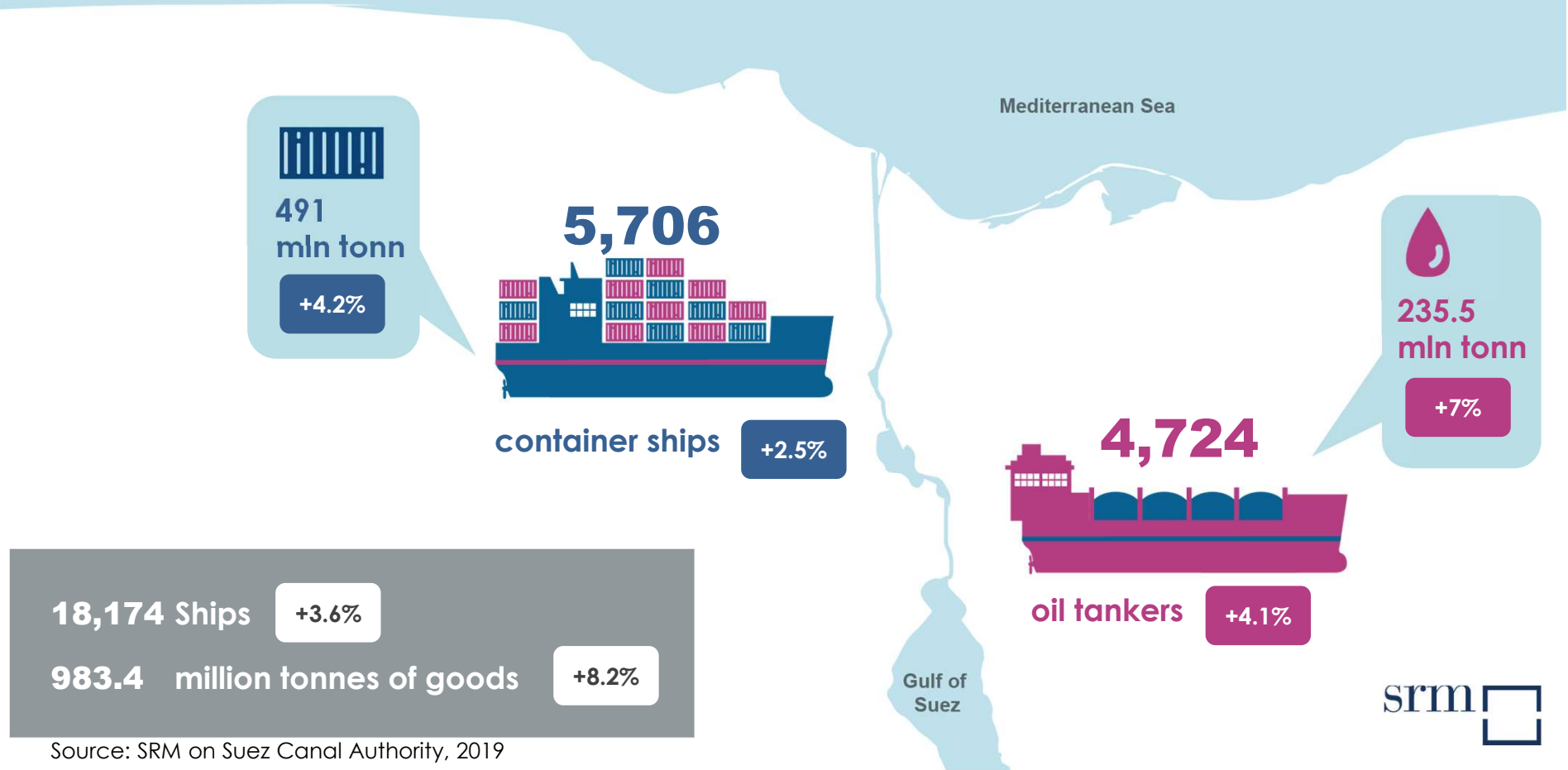


**NORTHERN
RANGE IS
SLOWING DOWN**

- **Northern Range** market share (39%) 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%.

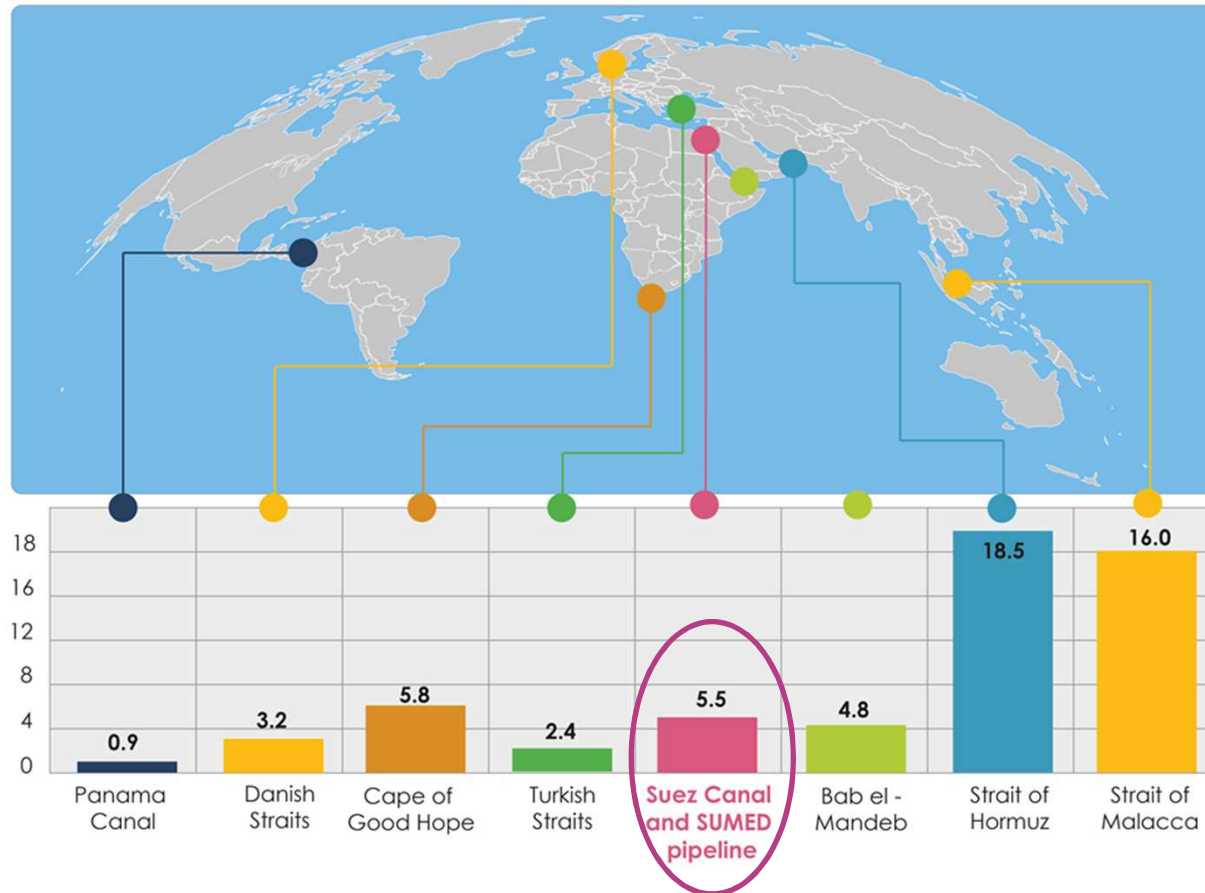
The Suez Canal: the new records

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Main oil global chokepoints

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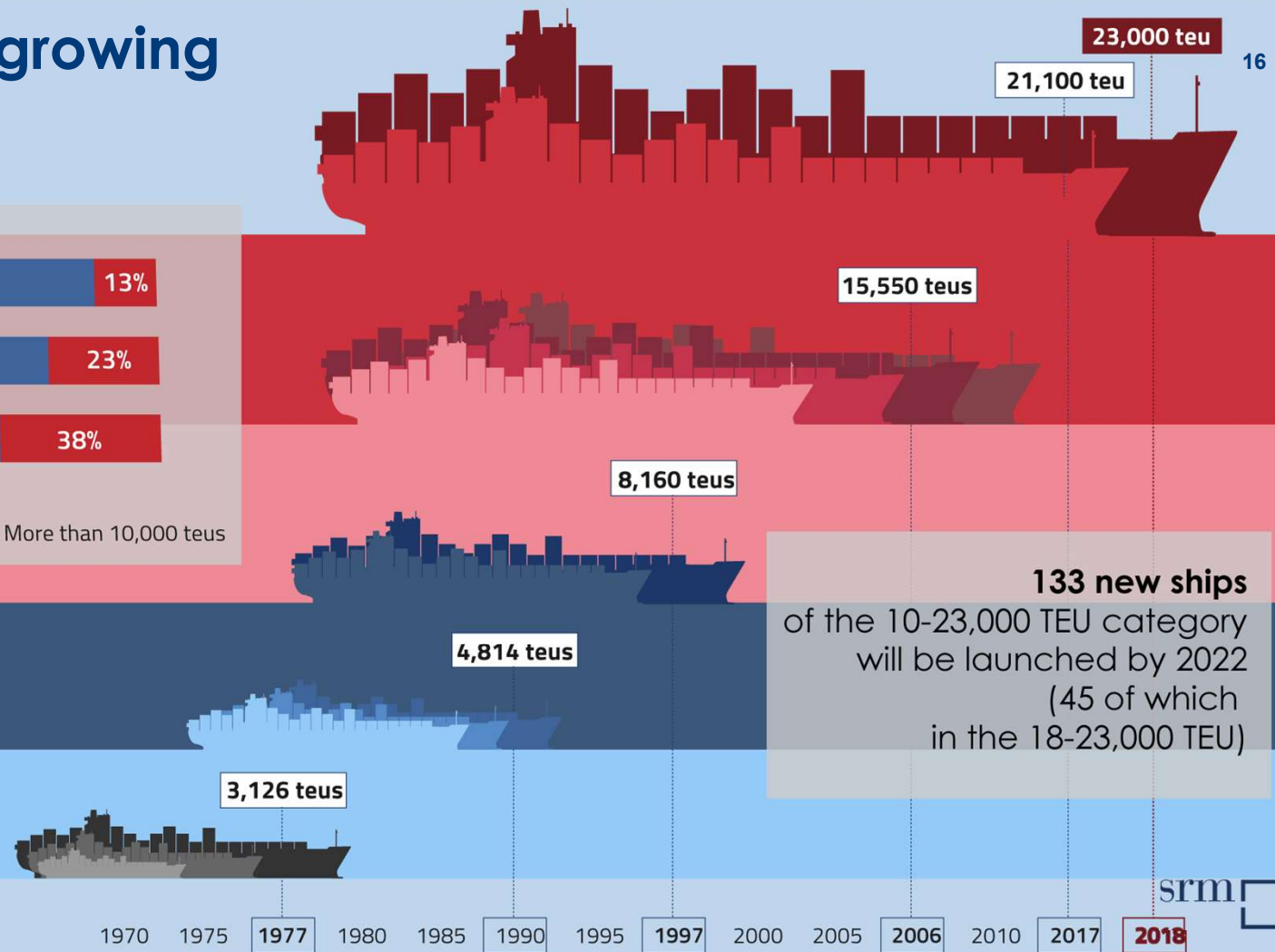


Source: SRM on U.S. Energy Information Administration

■ **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**.

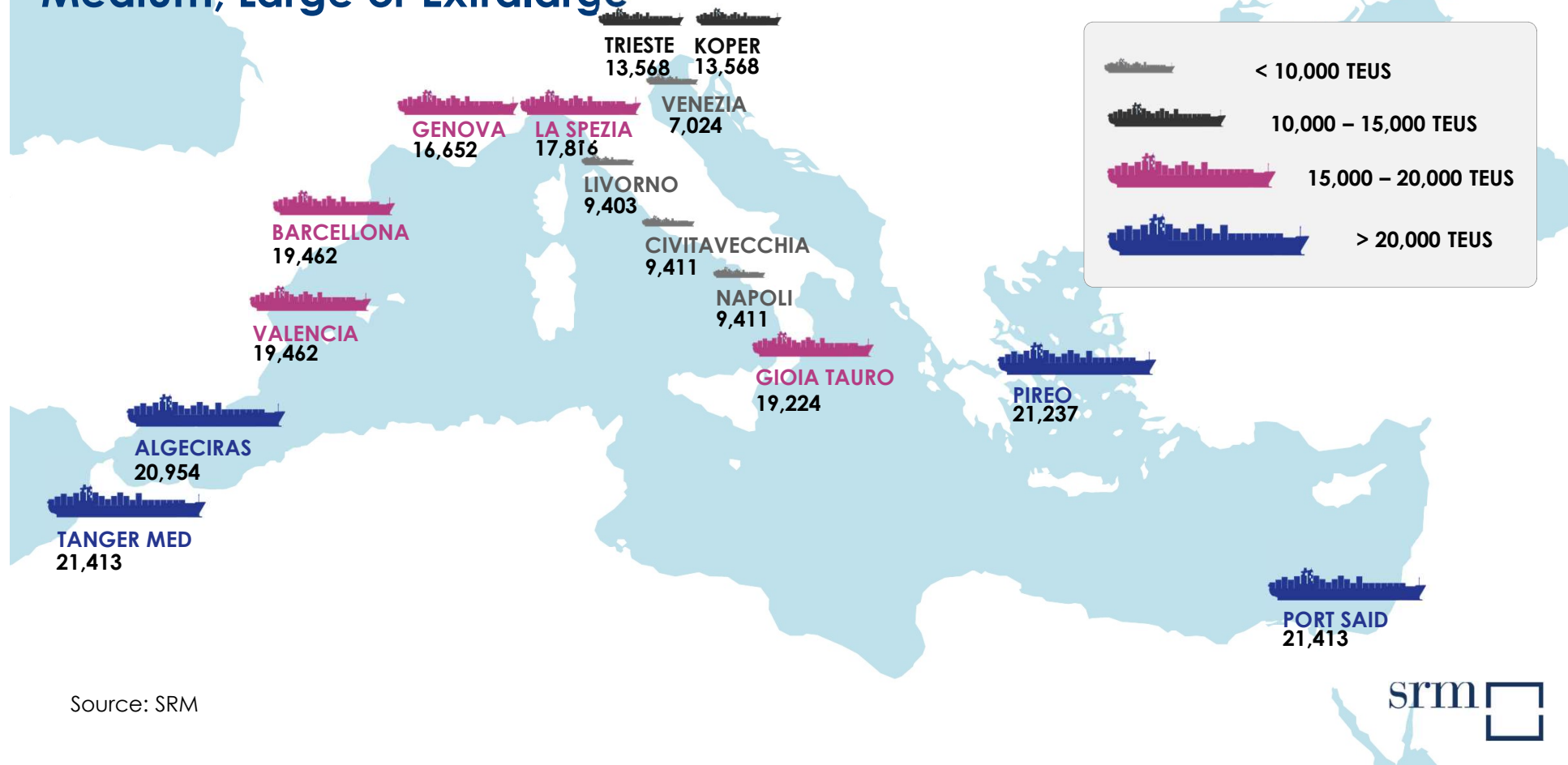
Ship Sizes are growing



Source: SRM

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

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The routes of the Ocean Alliance

2017

27%
OCEAN
ALLIANCE
TRAFFIC

+10%
COSCO
PRESENCE

LEGEND

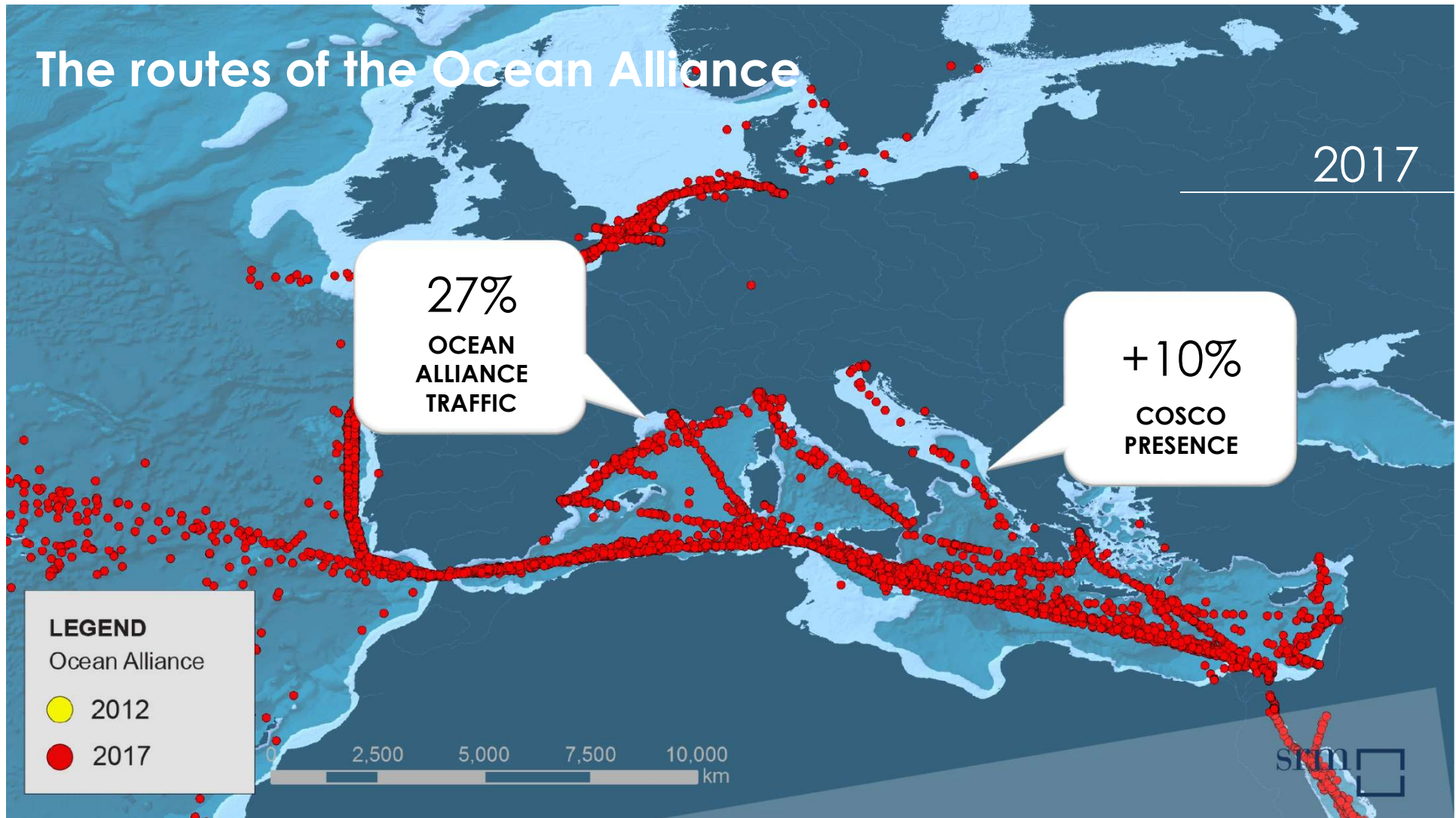
Ocean Alliance

2012

2017

0 2,500 5,000 7,500 10,000 km

SIN



The Short Sea Shipping map: Europe

Source: SRM on Eurostat

125

Cargo Carried
(Million tons)

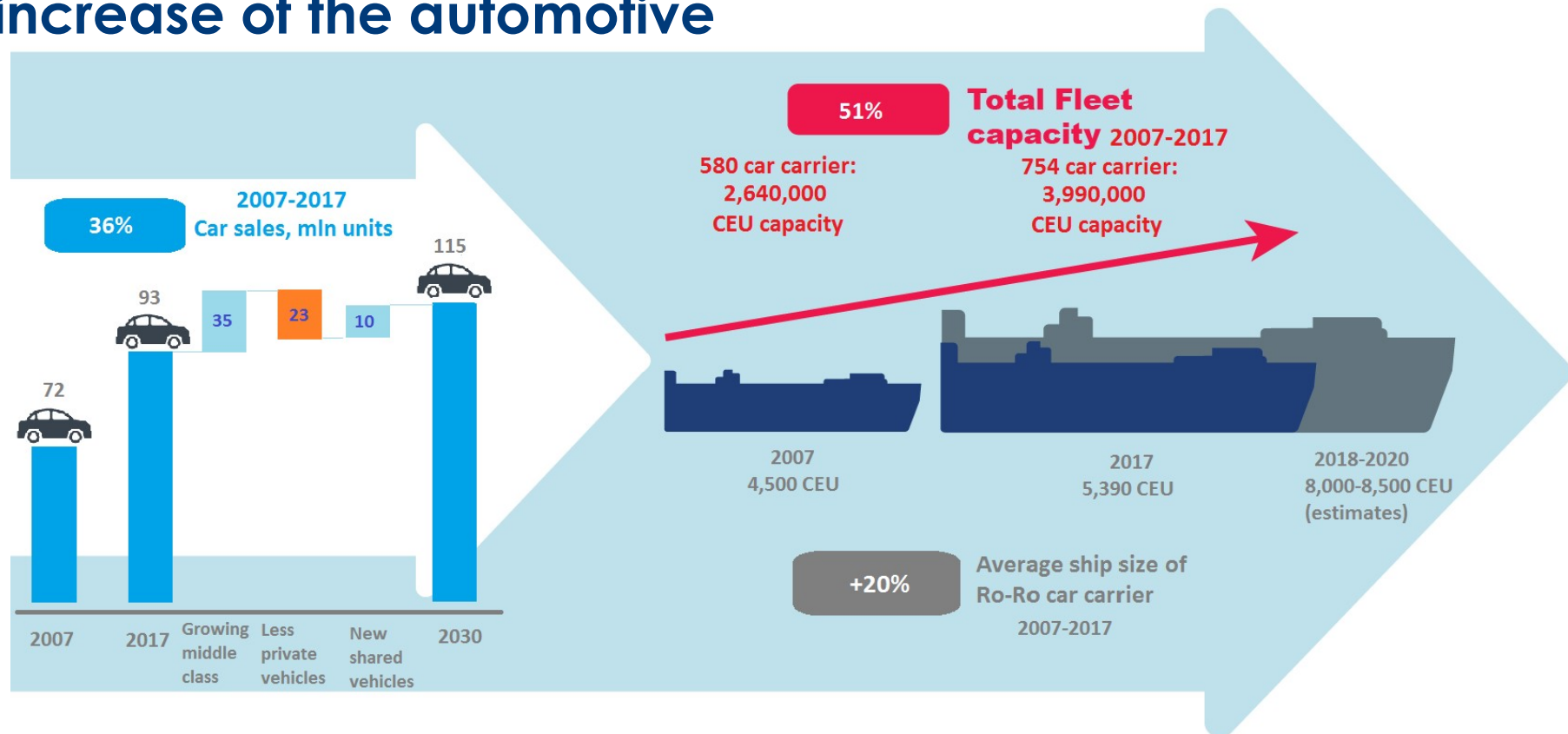
Main Short Sea
Shipping Corridor

from to

Cargo Transited
(Million tons)



The connection between the growth of Ro-Ro and the increase of the automotive ²⁰

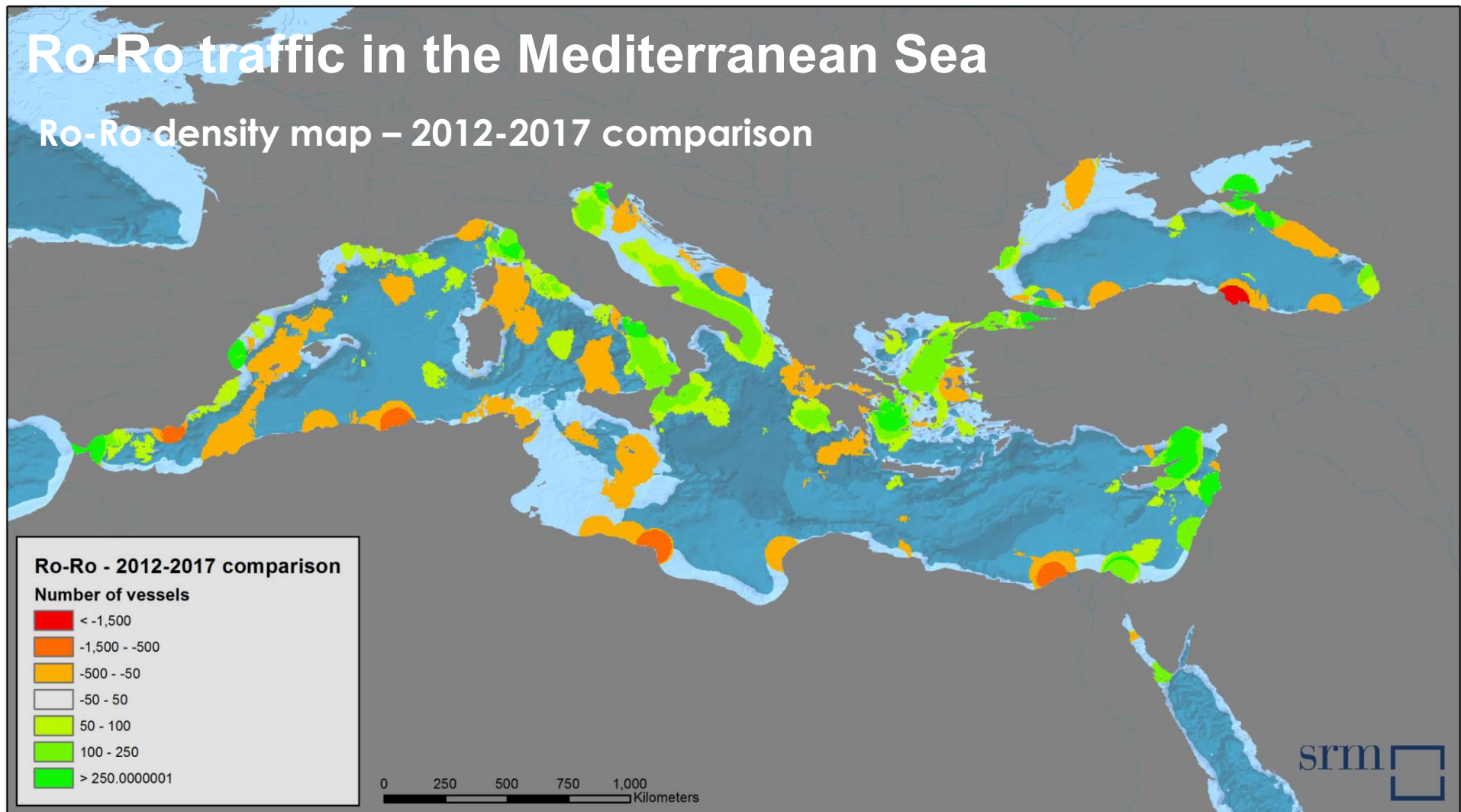


* CEU (car equivalent unit)

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

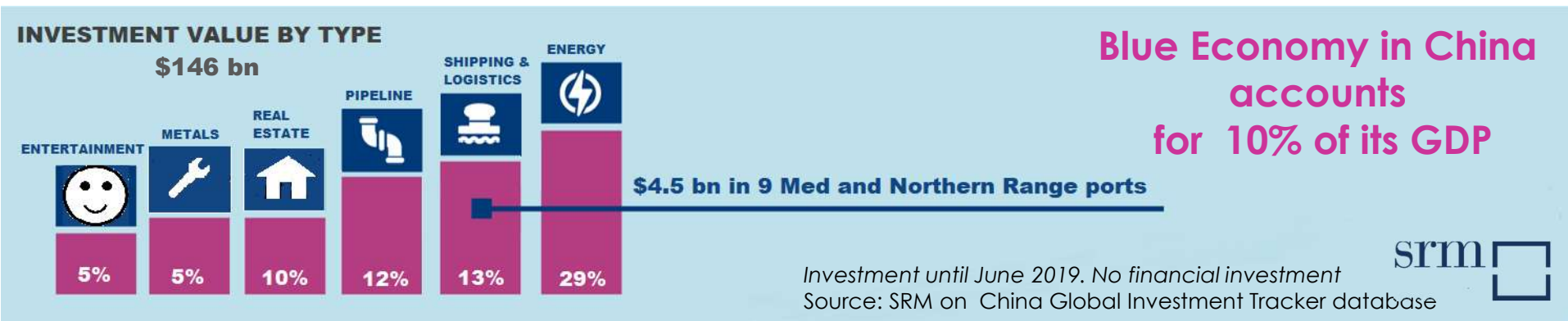
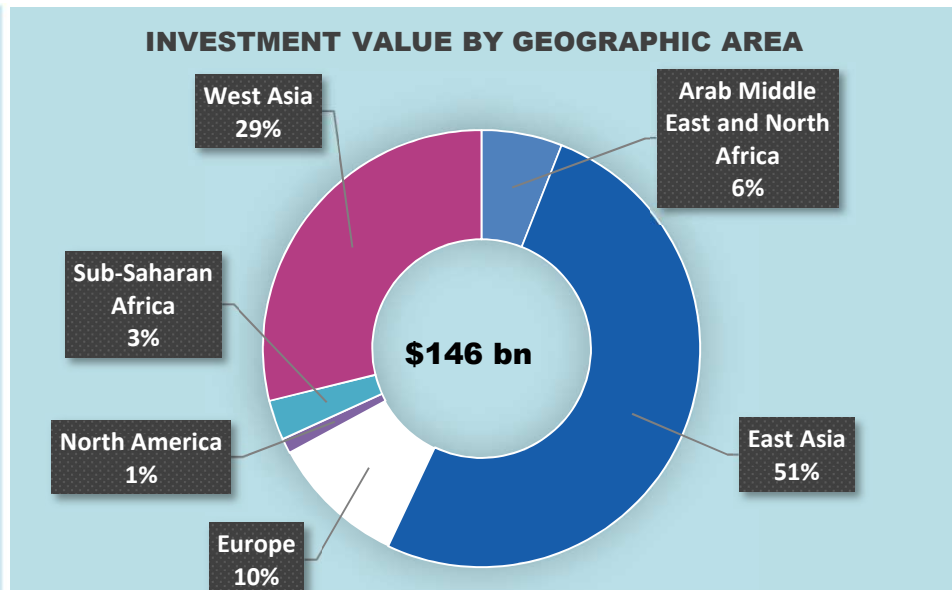
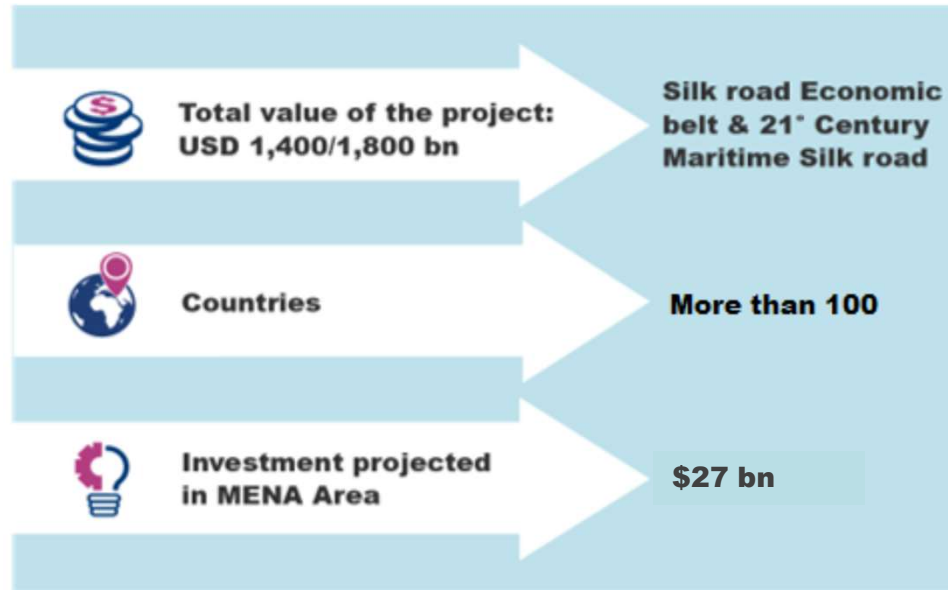
Ro-Ro traffic in the Mediterranean Sea

Ro-Ro density map – 2012-2017 comparison



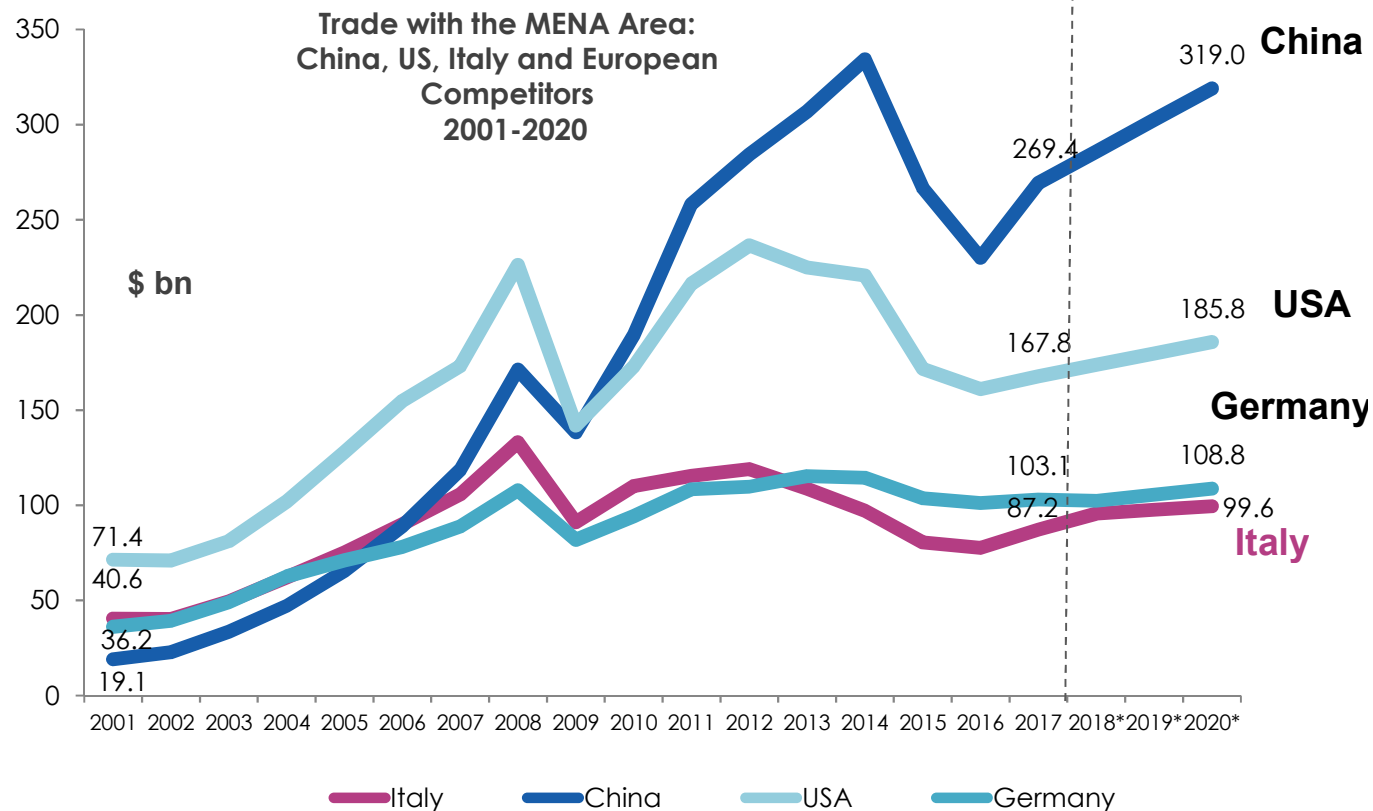
The role of BRI in the Mediterranean

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A steady increase in trade relation towards the MENA area: China is the largest partner

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China ■ **China is the largest trade partner of MENA countries (\$269.4 bn import-export).**

■ **Italy's trade with MENA Area: \$87 bn (+70.4% on 2001). According to SRM forecast, this trade will reach \$99.6 bn in 2020.**

Source: SRM on UNCTAD

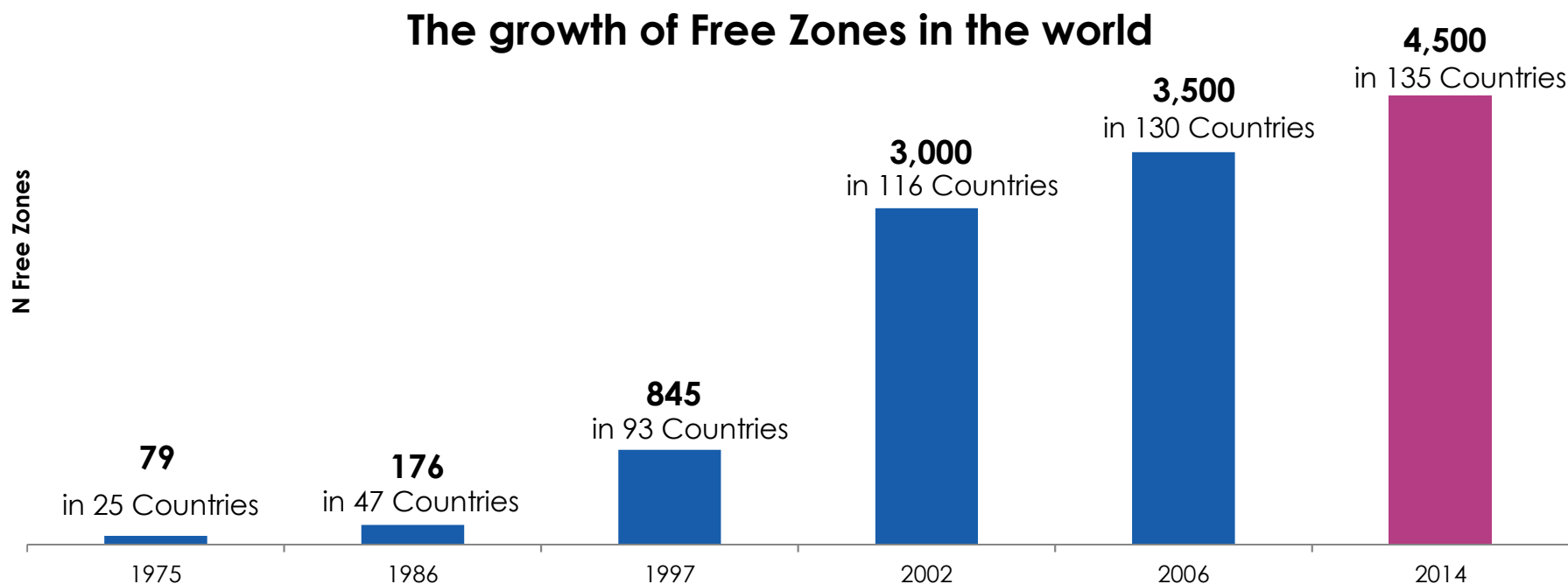
The Chinese chessboard

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Free Zones in the World

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Source: SRM on Trade Performance Of Free Trade Zones, 2014 and others

- There are about **4,500 Free zones** all over the world.
- These zones have created **68 million direct jobs** and **over \$ 500 billion of direct trade-related value added.**

Italian Free Zones: SEZ basic criteria

26



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





INTERNATIONAL- LISATION

- Dedicated department for the international development of the port
- Regular monitoring of routes and international trade



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INTERMODALITY

- Dedicated department for the development of intermodal traffic
- Local transport networks
- Monitoring of local and global transport phenomena



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TRAINING & ACADEMY

- Regular and consolidated relations with universities and Centres of Research
- Study rooms for students
- Heritage of publications and databases



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INNOVATION & START-UP

- The Port XL model
- Support from port managers with specialised expertise and incentives



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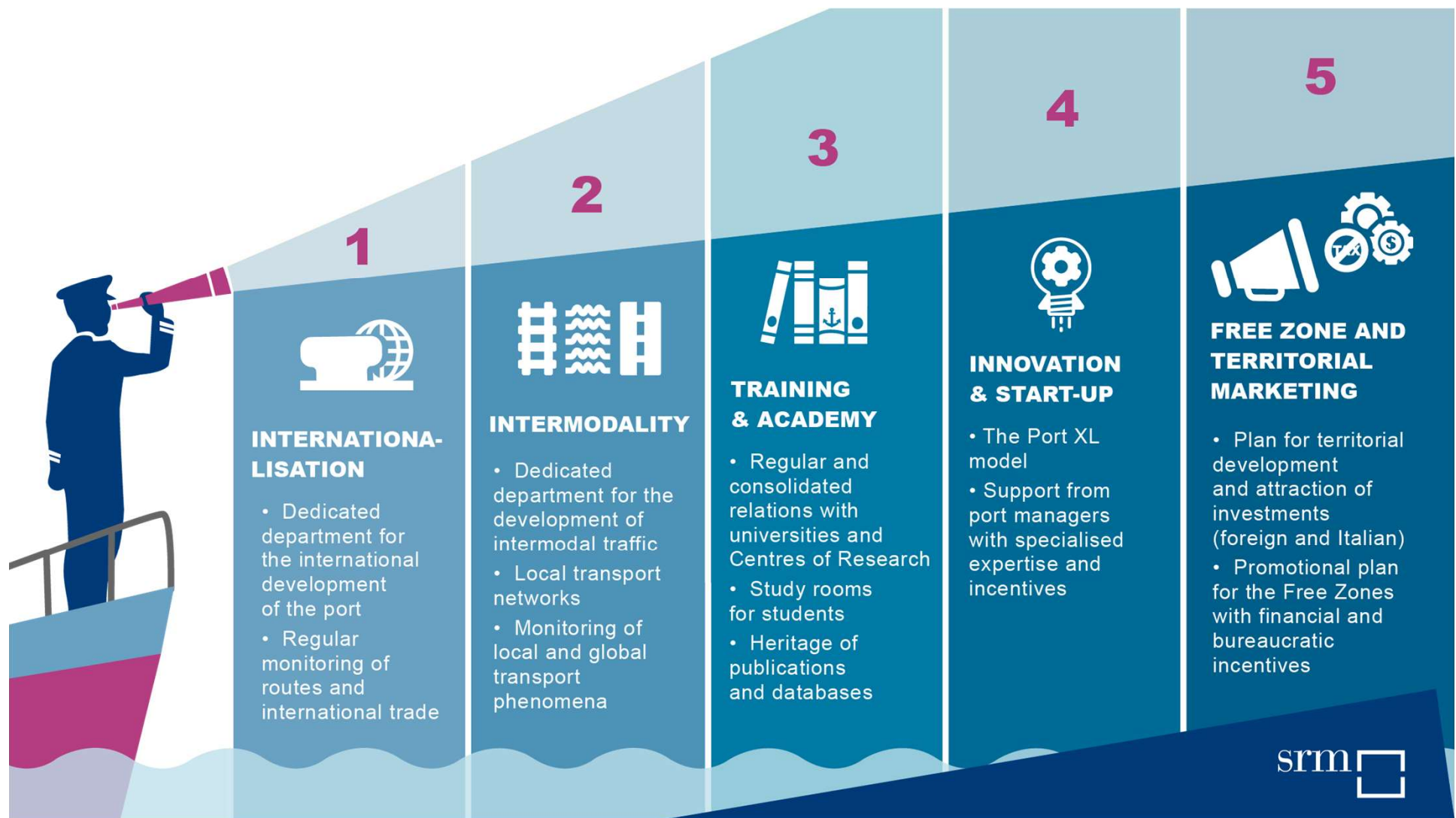
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FREE ZONE AND TERRITORIAL MARKETING

- Plan for territorial development and attraction of investments (foreign and Italian)
- Promotional plan for the Free Zones with financial and bureaucratic incentives





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