



Intermodal connections and the Port system: strategies for the development of the EUSALP area in the perspective of 2030 trend

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Trieste, 26th September 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

www.srm-maritimeeconomy.com

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Geo-strategic scenarios of Italian ports in the Mediterranean | Assoporti | 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

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

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The relevance of seaborne trade



Maritime traffic and infrastructures



Intermodality: a key of success

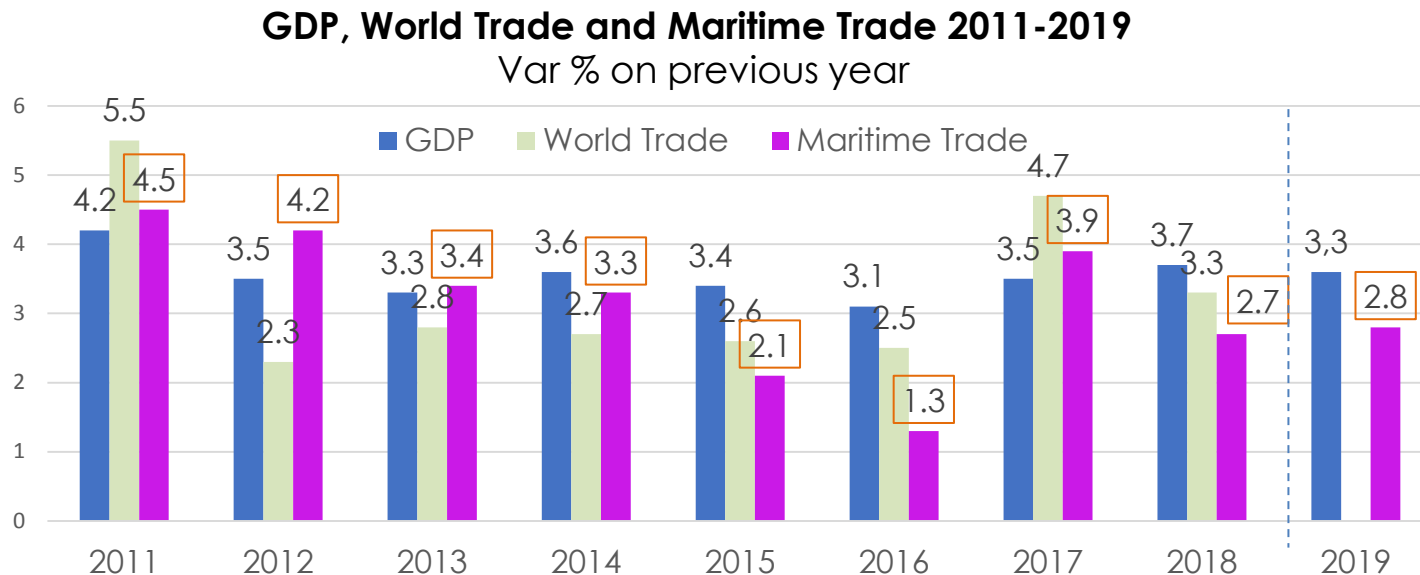


The biggest future trends of Maritime traffic

The growth of the world seaborne trade

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- Globalization: **GDP, merchandise trade** and **seaborne trade** are interlinked and **have grown rapidly**.
- In 2018, seaborne trade grew by 2.7% (GDP 3.3%). In 2019 it will grow by 2.8%.

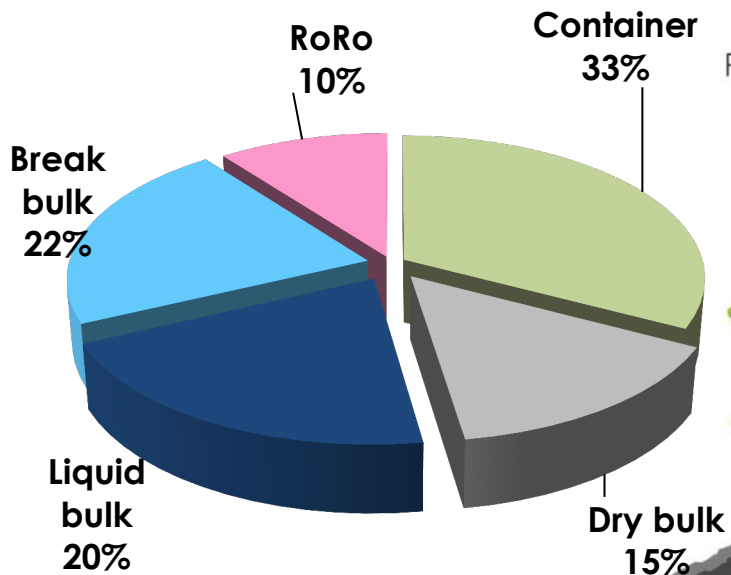


Source: Confitarma and IMF 2019

The weight of the MED in the EUSALP area

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*MED seaborne trade:
2 bn tonnes*



*The strategy concerns:
7 Countries; 48 Regions*

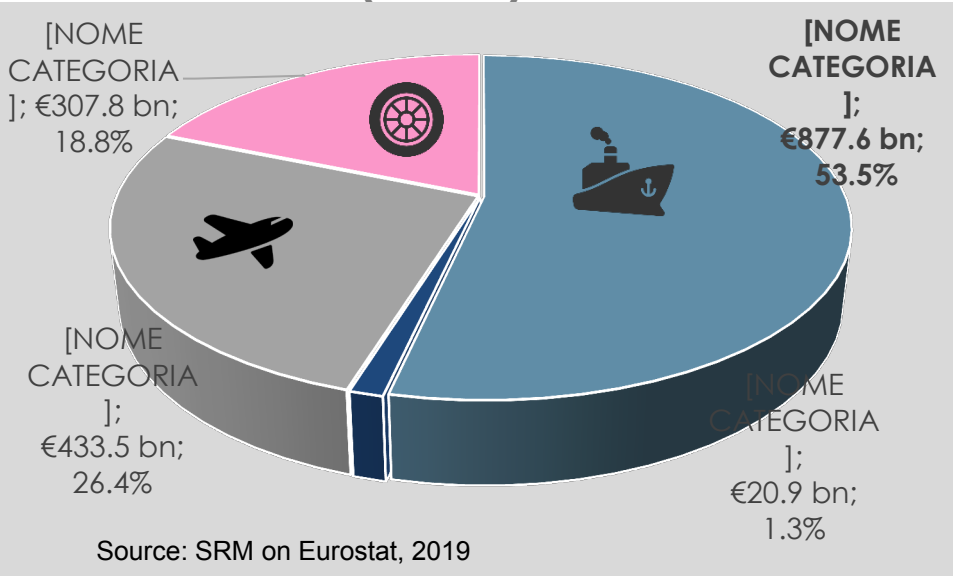


Source: SRM on OECD, 2019

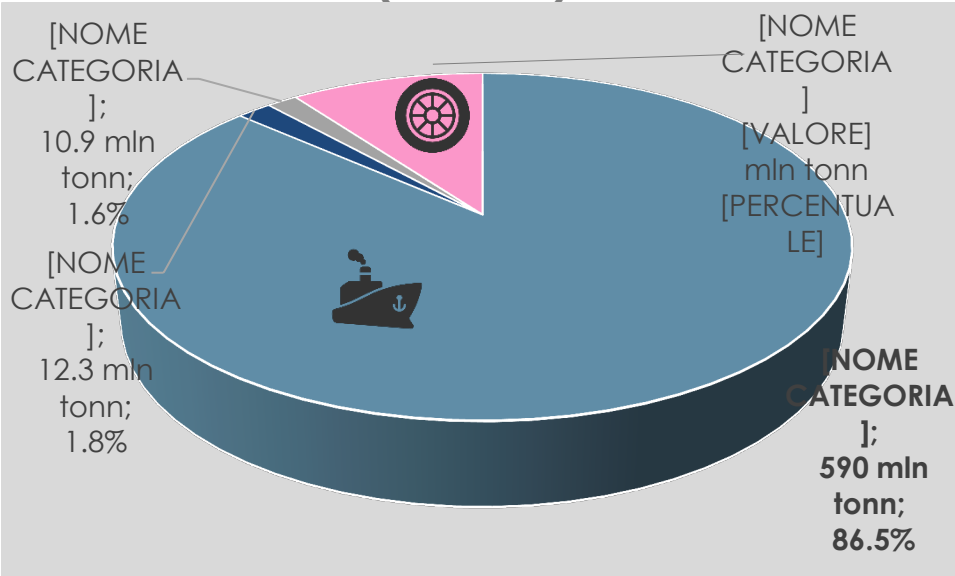
Area's trade with extra-EU by mode of transport

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Import-Export Eusalp Countries
by Mode of transport. 2018
(VALUE)



Import-Export Eusalp Countries
by Mode of transport. 2018
(TONNES)

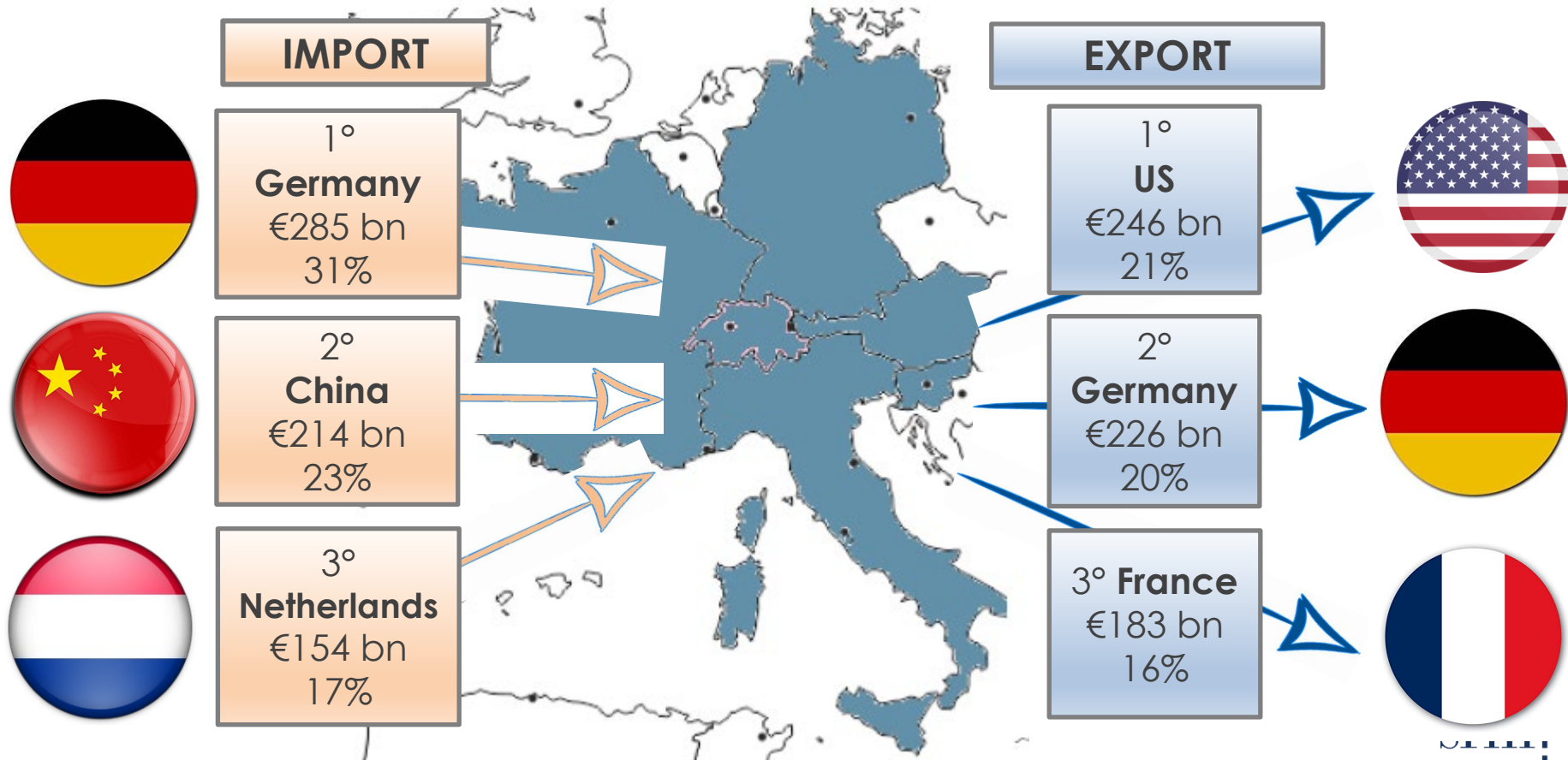


In 2018, EUSALP Countries maritime trade with extra EU reached **almost €900 bn** equal to **more than half** of the total.

EUSALP Countries volume of maritime traffic amounted to almost **600 million tonnes** equal to **87% of the total**.

Area's trade partner

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Source: SRM on UNCTAD 2019

A strategic sector: Ro-Ro traffic in Europe

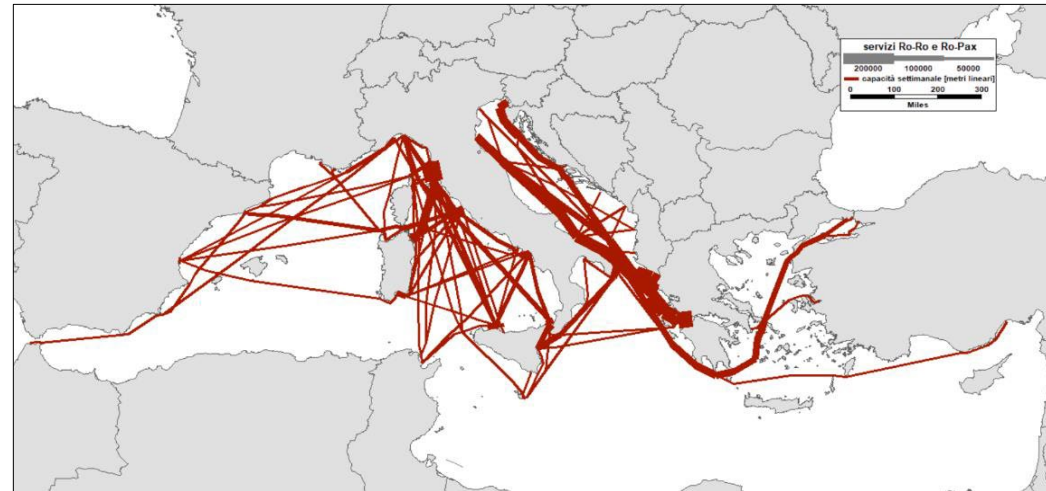
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**478 mln tonnes of goods (+1.4%)
carried on Ro-Ro ships in Europe**

Share on UE:



Ro-Ro and Ro-pax services in Italy: weekly capacity



- **109 mln tonnes of Ro-Ro cargo** handled in Italy in 2018
- 85% of services provided by Italian companies



86 mln on the Tyrrhenian (and Islands side)
23 mln on the Adriatic side



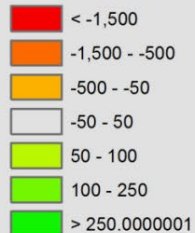
Source: SRM on Assoporti, Eurostat, RAM

Ro-Ro traffic in the Mediterranean Sea

Ro-Ro density map – 2012-2017 comparison

Ro-Ro - 2012-2017 comparison

Number of vessels

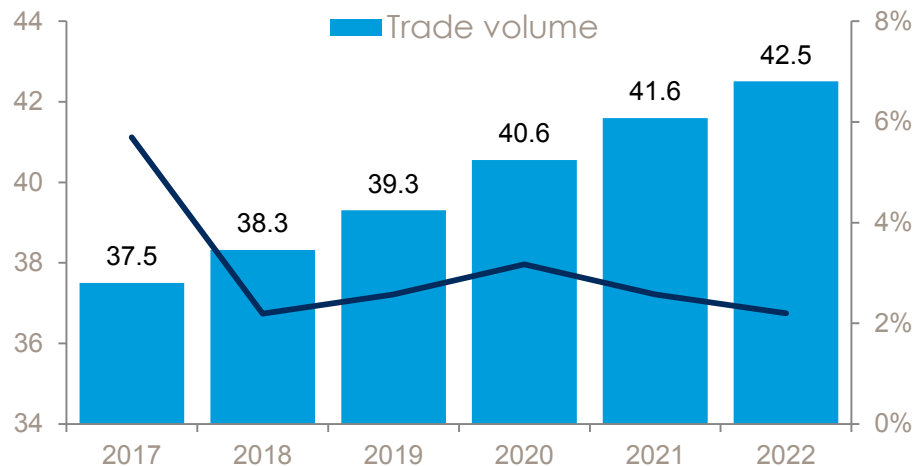


0 250 500 750 1,000
Kilometers

Vehicles' Export is rising

10

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%)**

■ This data is very interesting for **the EUSALP Area**

Fonte: Drewry Maritime Research, 2018

Transalpine freight traffic flows

The amount of goods carried across the Alps reached a new record of **216.2 million tonnes** (road:146 & rail: 70.2).

Switzerland:
38.8 Mln T.

Gotthard: 22.2 Mln T.
Road: 8.6 Rail: 13.6

Simplon: 14.6 Mln T.
Road: 1.0 Rail: 13.6

Gr. St. Bernard: 0.4 Mln T.
Road: 0.4

Mont Blanc: 9.4 Mln T.
Road: 9.4 Rail: -

Frejus: 13.8 Mln T.
Road: 11.1 Rail: 2.7

Montgenèvre: 0.6 Mln T.
Road: 0.6 Mln T. -

France:
44.1 Mln T.

Ventimiglia: 20.2 Mln T.
Road: 19.5 Rail: 0.7

San Bernardino: 1.8 Mln T.
Road: 1.8

Reschen: 1.2 Mln T.
Road: 1.2

Brenner: 49.4 Mln T.
Road: 35.6 Rail: 13.8

Tauern: 26.7 Mln T.
Road: 1.2

Semmering: 16.7 Mln T.
Road: 5.7 Rail: 11

Shoberpass: 22.5 Mln T.
Road: 18.1; Rail: 4.4

Wechsel: 16 Mln T.
Road: 15.9 Rail: 0.1

Austria:
133.2 Mln T.

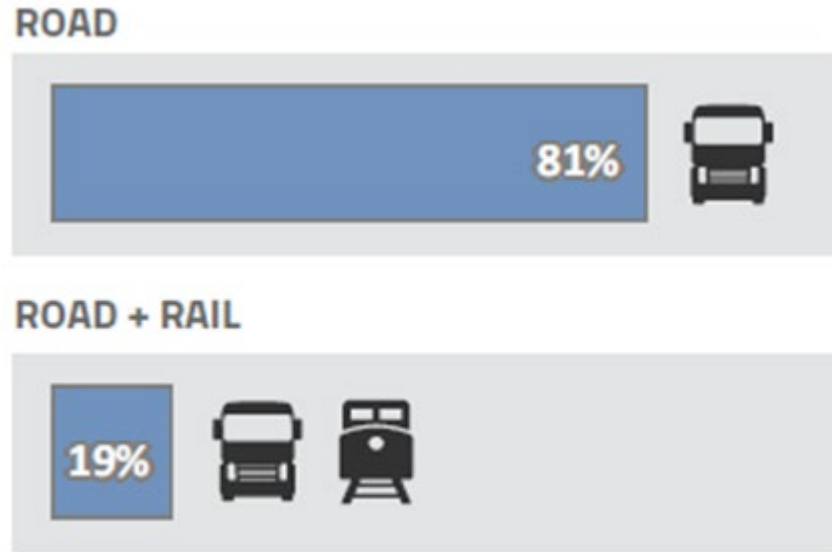
■ France
■ Switzerland
■ Austria

**International
traffic
involving Italy:
161 Mln T
(Road: 106;
Rail: 55)**

Source: EC DG MOVE- Swiss Confederation Federal Office of Transport (FOT) - Observation and analysis of transalpine freight traffic flows, Key figures 2017

From companies to ports: intermodality is still low

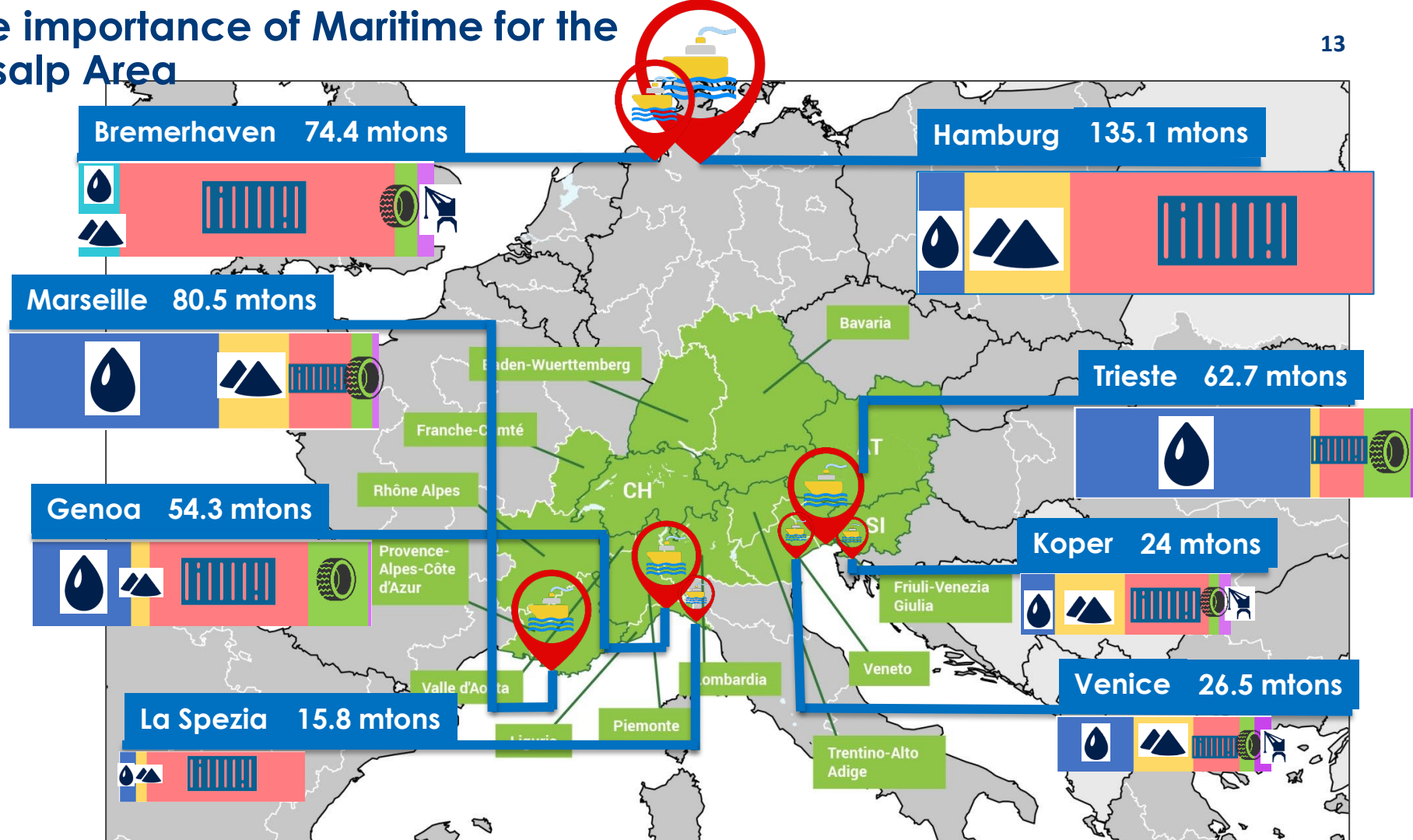
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Source: SRM/Contship

- **81%** of companies use only road to transport goods from companies to the port and viceversa. Just 19% use also trains.

The importance of Maritime for the Eusalp Area



The value of the port system

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The impact of the port system on the national economy in terms of value added:

€25.5 bn

The impact on the economy of an increment of the capacity of port system:

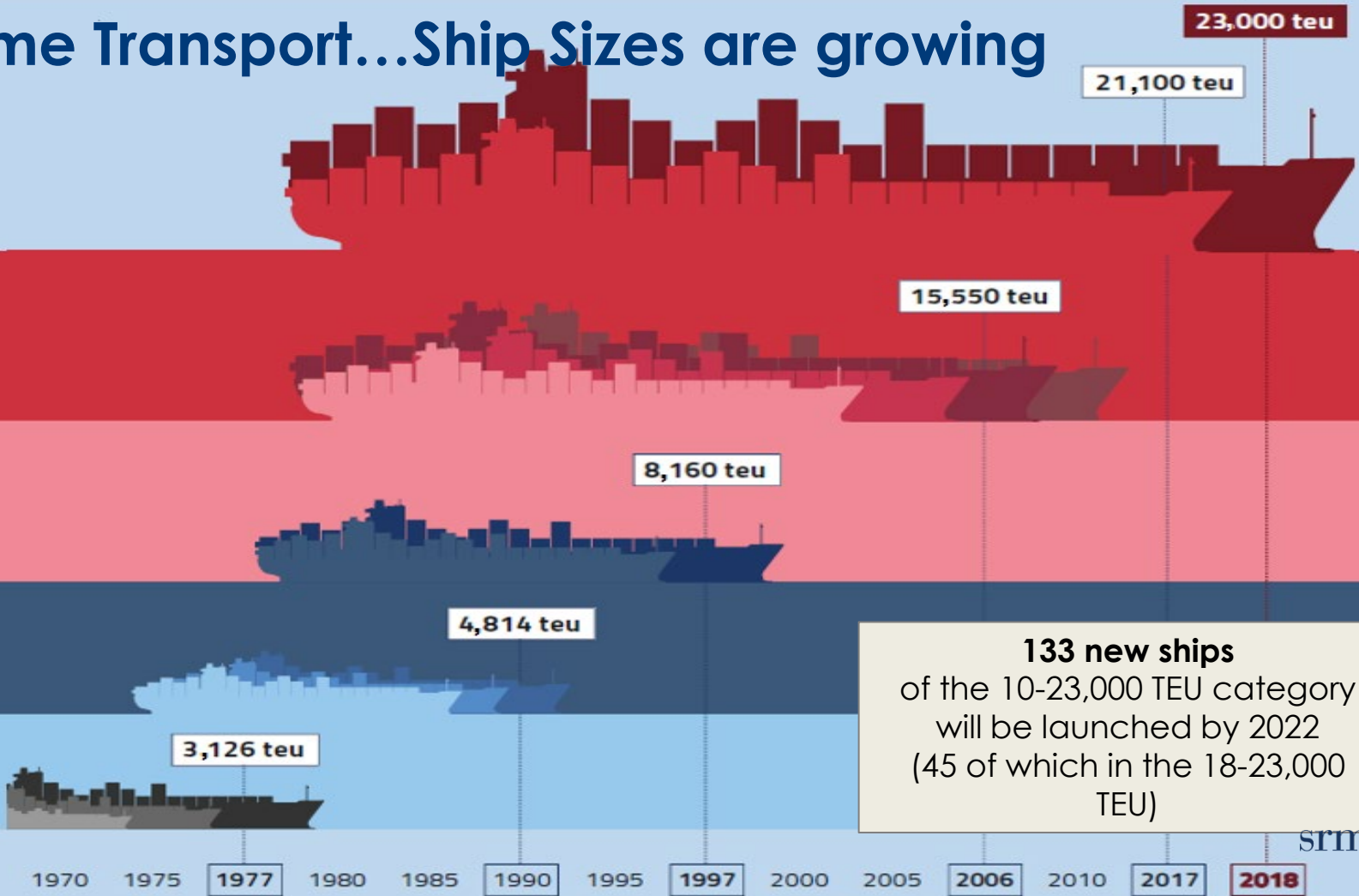
+ 3.2 billion Euros of value

added

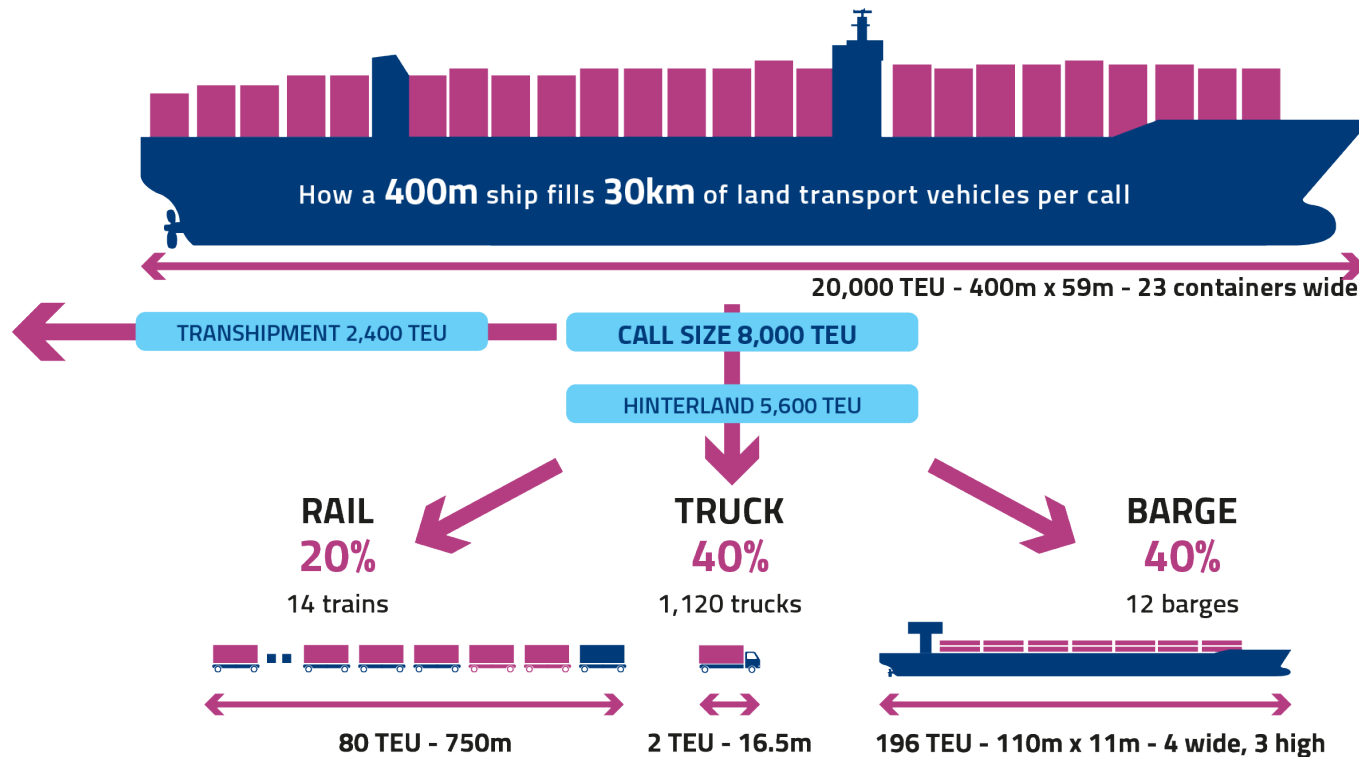
**+10% Investments
in port system**

Maritime Transport...Ship Sizes are growing

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The impact of a megaship on intermodal system





INTERNATIONAL- LISATION

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



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INNOVATION & START-UP

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



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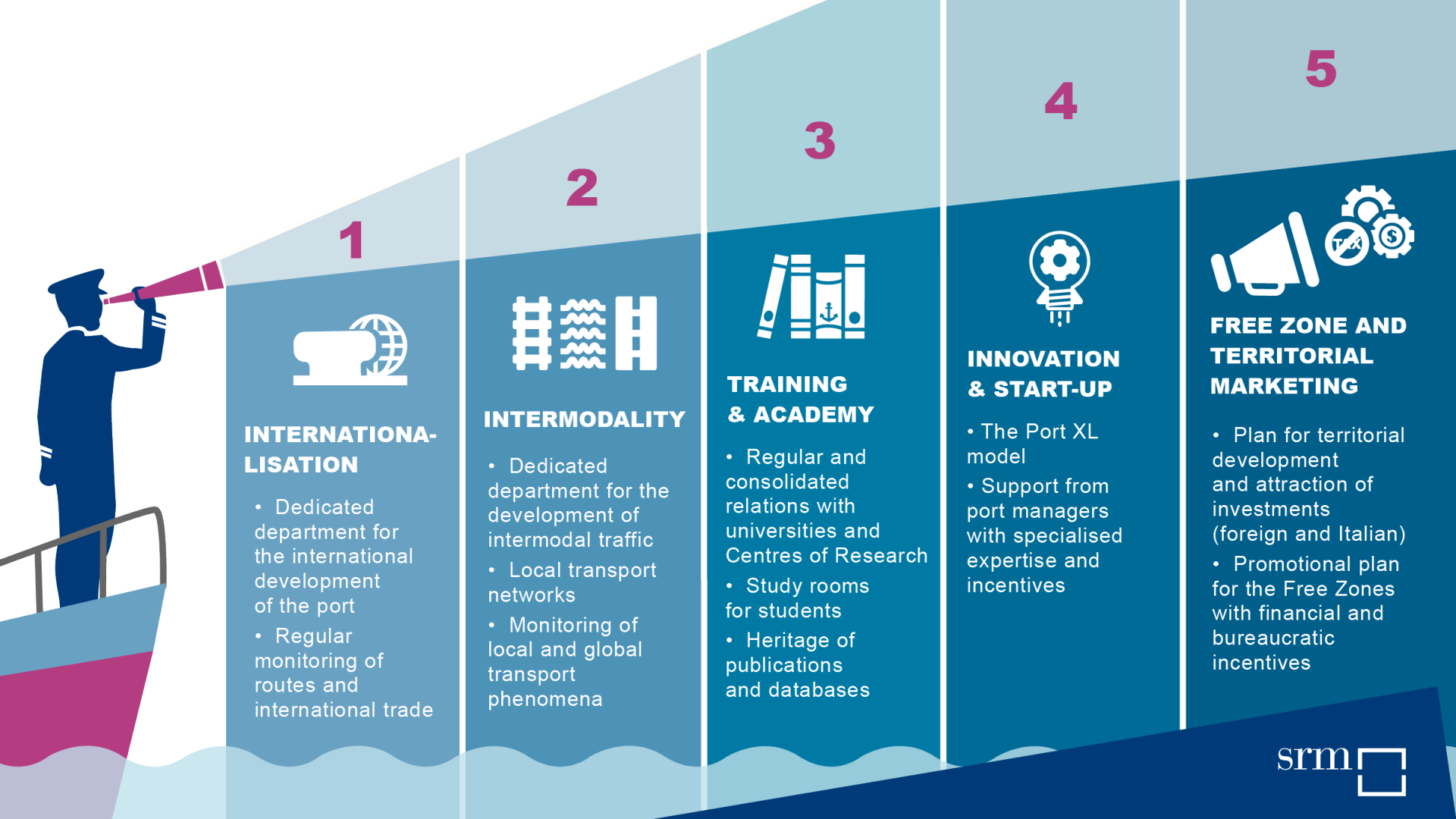
INNOVATION & START-UP

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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



Conclusions



The economic relevance of Maritime for the EUSALP Area



The integration of infrastructures



The growth of the port system



An intermodal vision

.... to achieve a better and more sustainable future