

What's happening in the Med area?

The new maritime phenomena

Alessandro Panaro
Head of Maritime & Energy Dept. SRM
Intesa Sanpaolo Banking Group

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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

[Read More](#)

Consulta la Nota Congiunturale sul Trasporto Merci di Confetra

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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Con Intesa Sanpaolo a Cagliari | Un nuovo convegno sull'Economia del mare

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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Speaker a Trieste | Workshop Connectivity in the Alpine Region

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

[Read More](#)

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

[Aggiungi al carrello](#)

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**

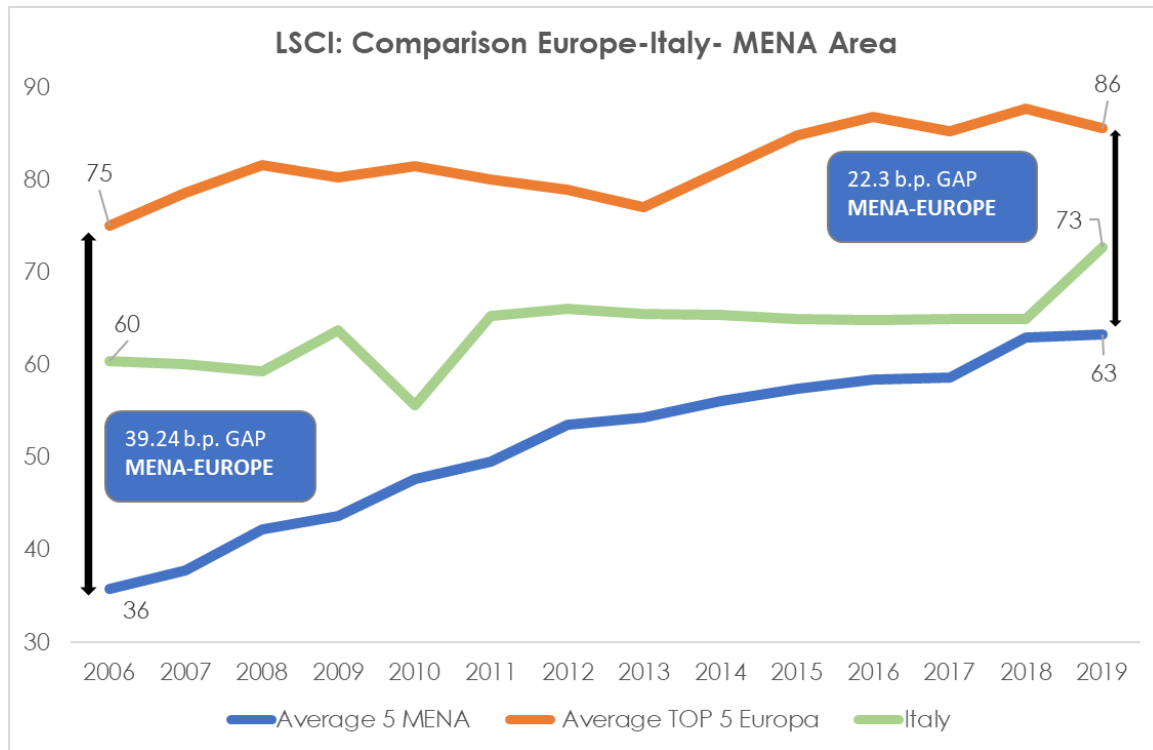
**614 mln
tonnes
SHORT SEA
SHIPPING**

**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

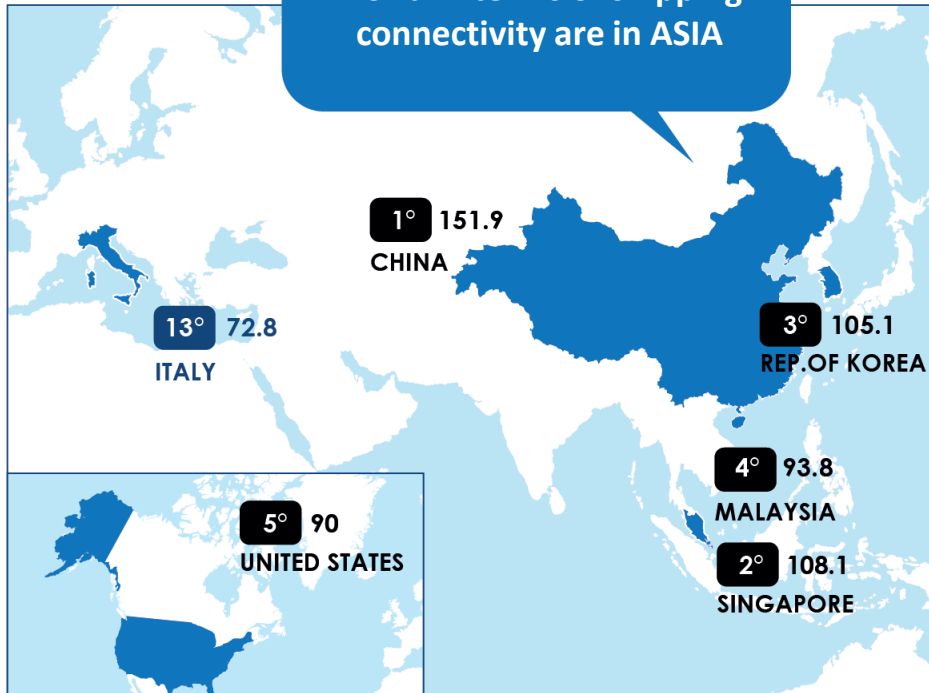
Belgium,
Germany,
Netherlands,
Spain, UK

Source: SRM on UNCTAD

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

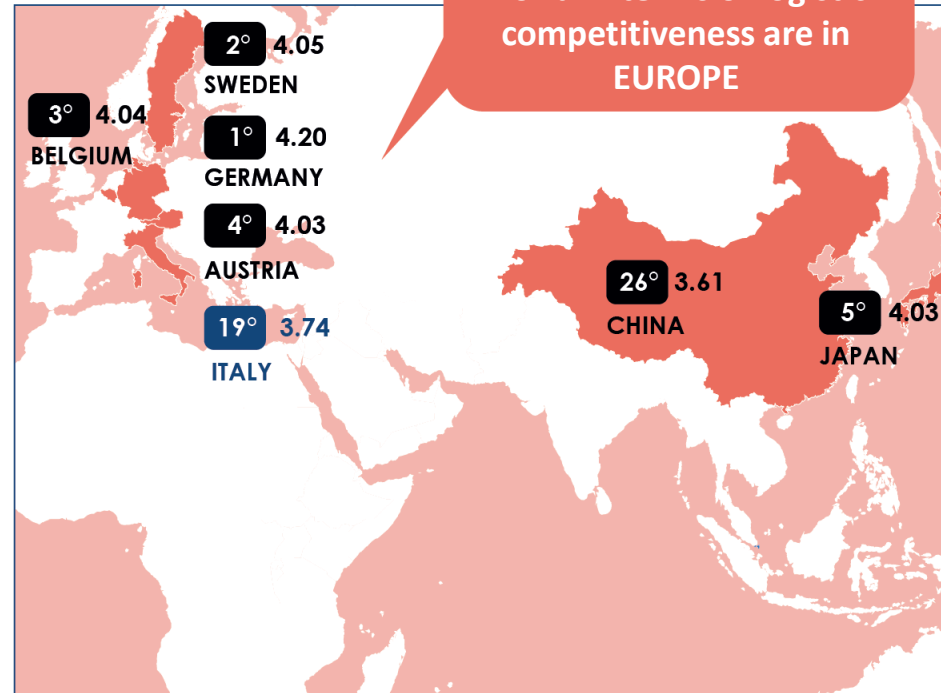
LSCI

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



LPI

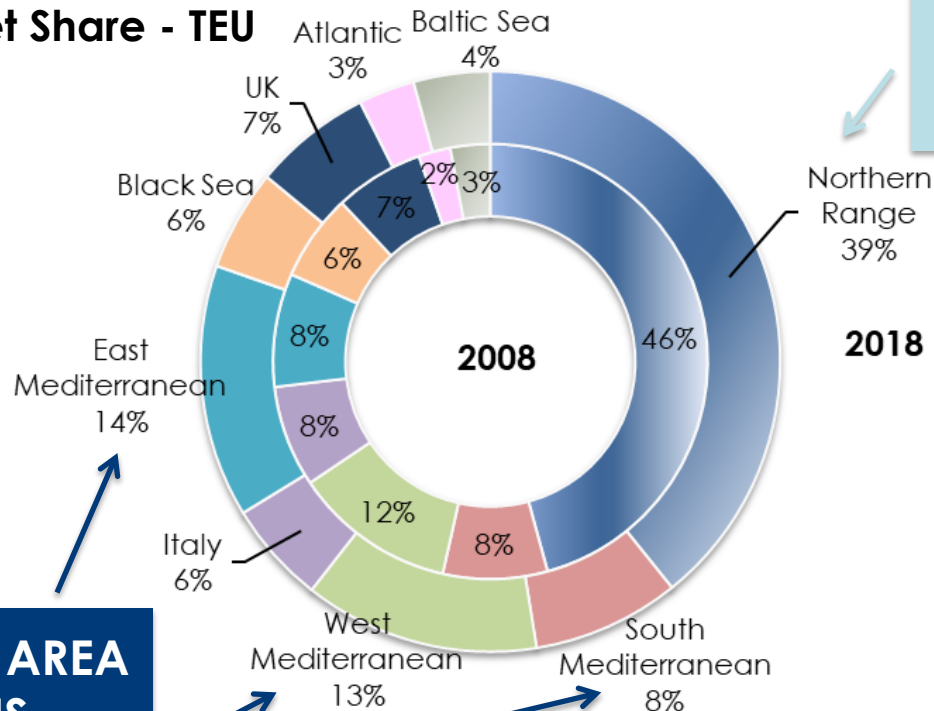
The top 4 countries of the world in terms of logistic competitiveness are in EUROPE



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

7

Market Share - TEU



**NORTHERN
RANGE IS
SLOWING DOWN**

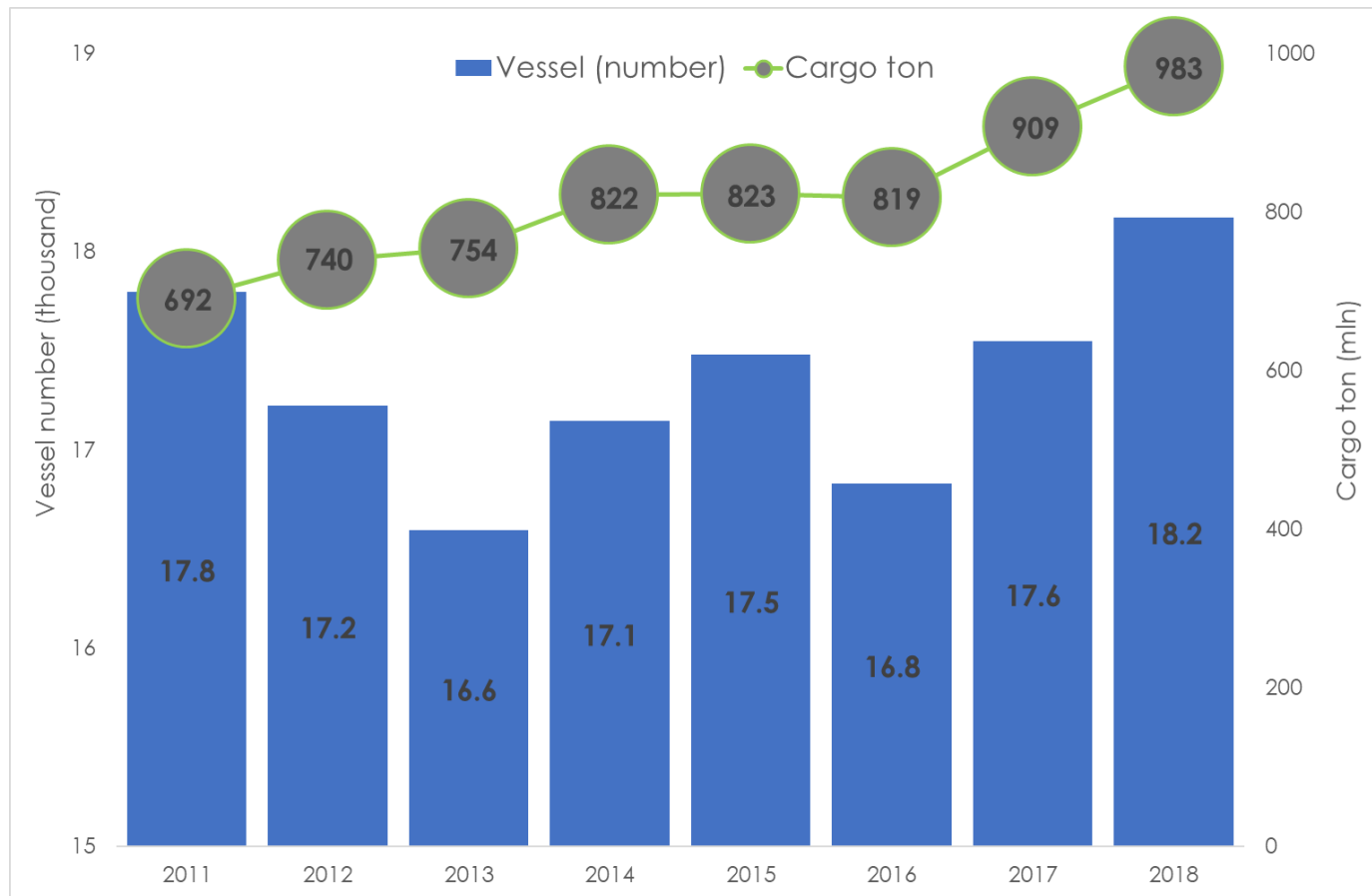
2018

- **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

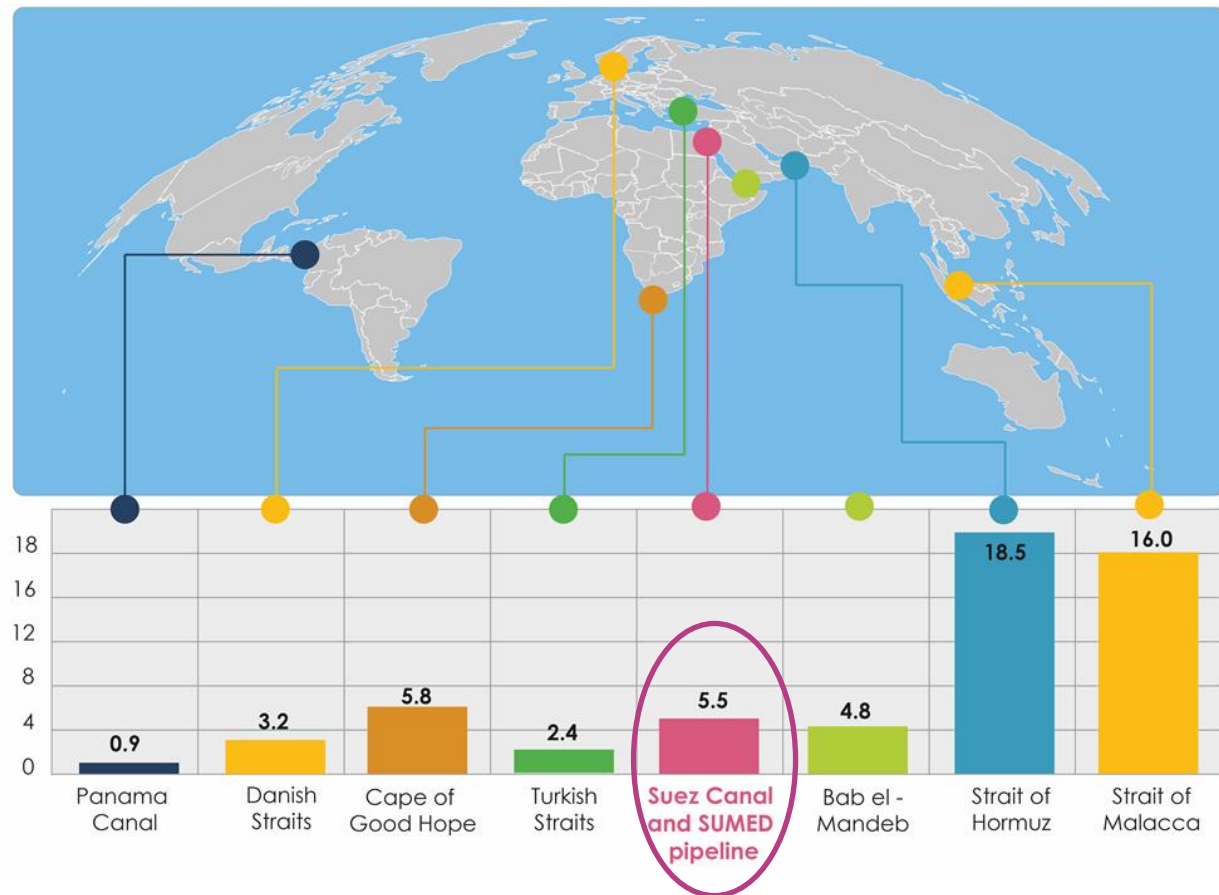
The Suez Canal: the new records



Source: SRM on Suez Canal Authority, 2019

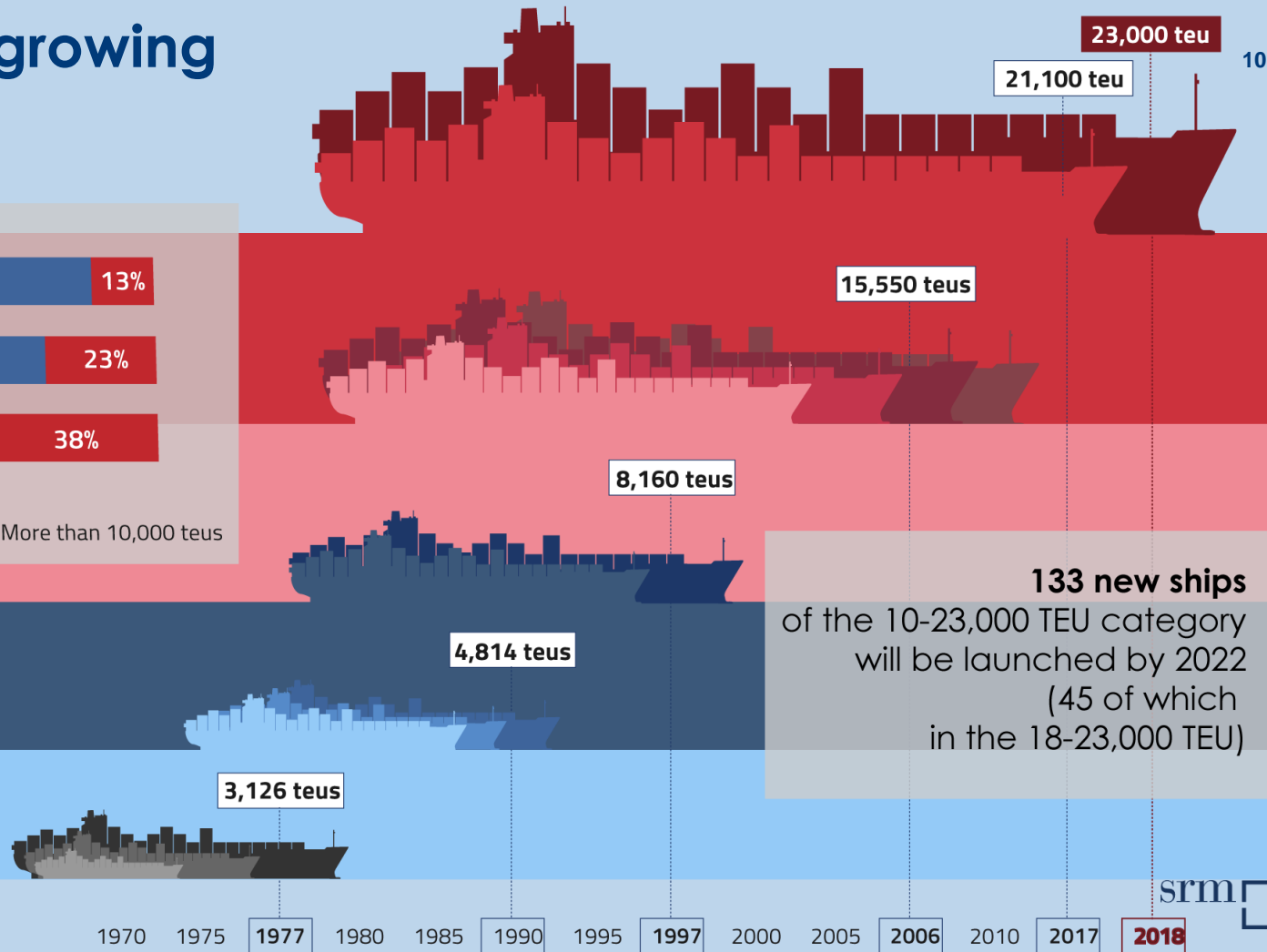
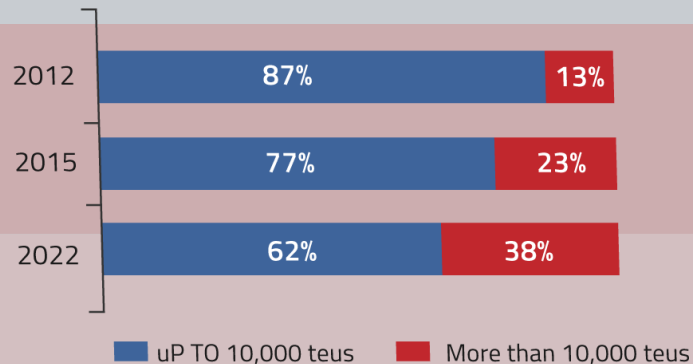
Main oil global chokepoints

9



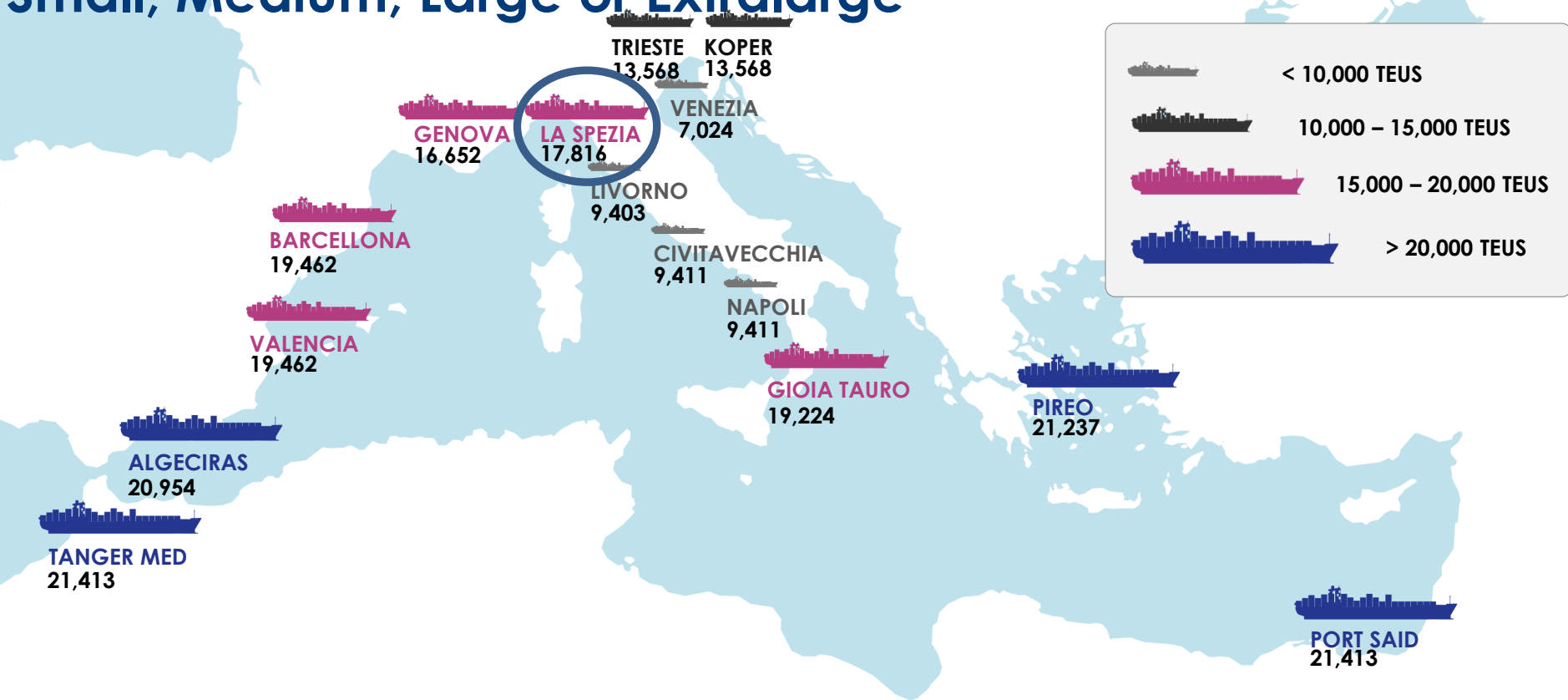
- **Suez** (and the Sumed pipeline) was the **3rd** transit route in the world for the transport of crude oil and petroleum products with 5.5 million barrels per day.
- It amounts for 9% of global oil trade and **LNG**.

Ship Sizes are growing



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

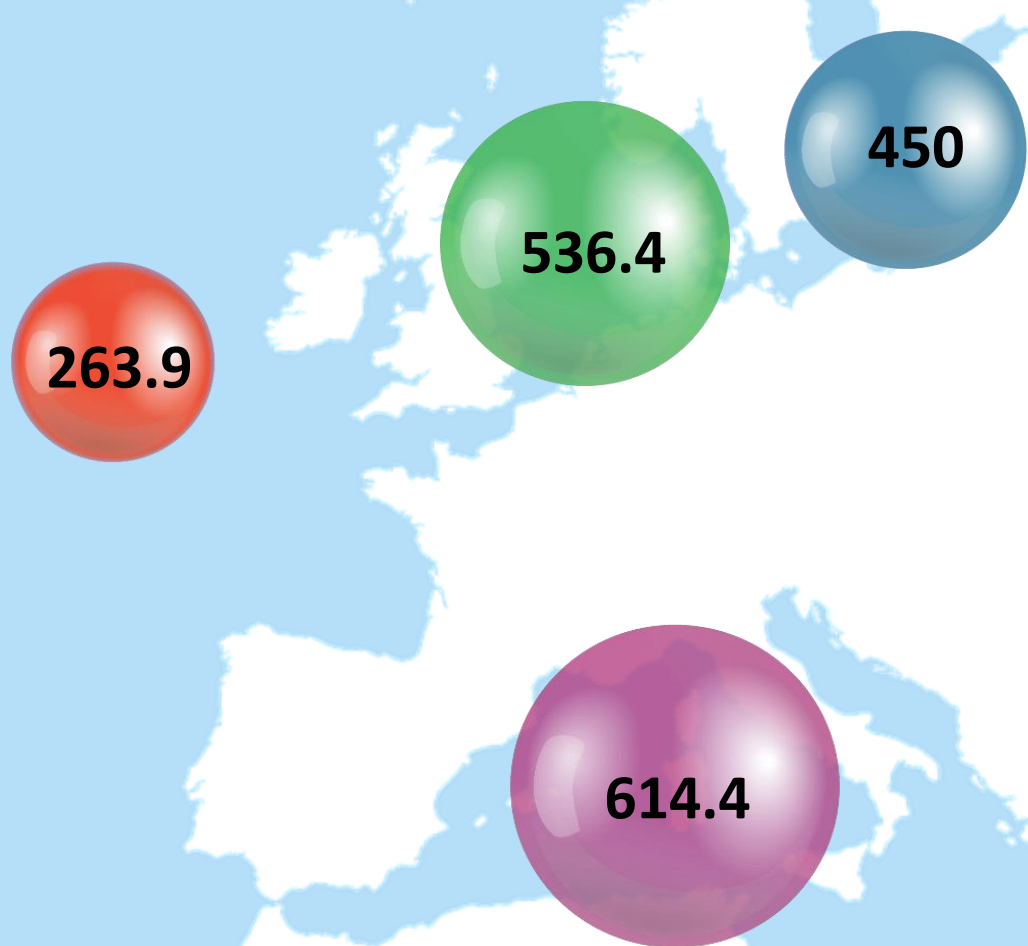
11



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

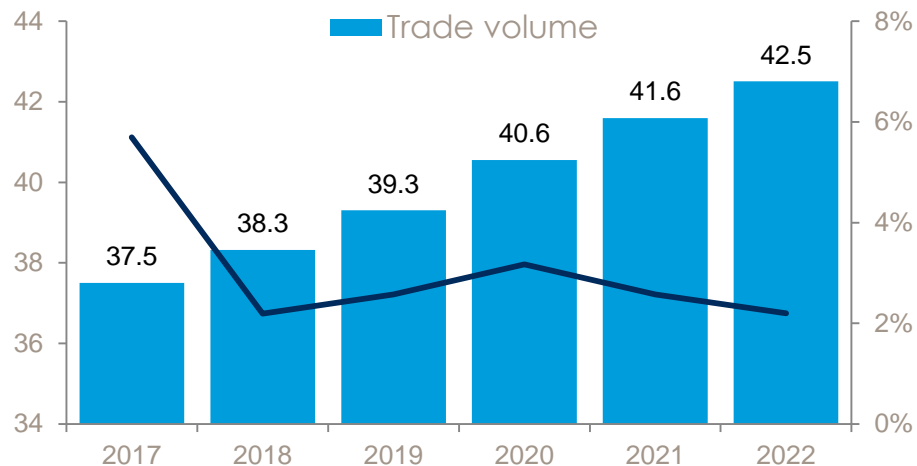
■ For SSS, especially in Europe, **Roll-on Roll-off (RoRo)** is almost equally important as container shipping

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%)**

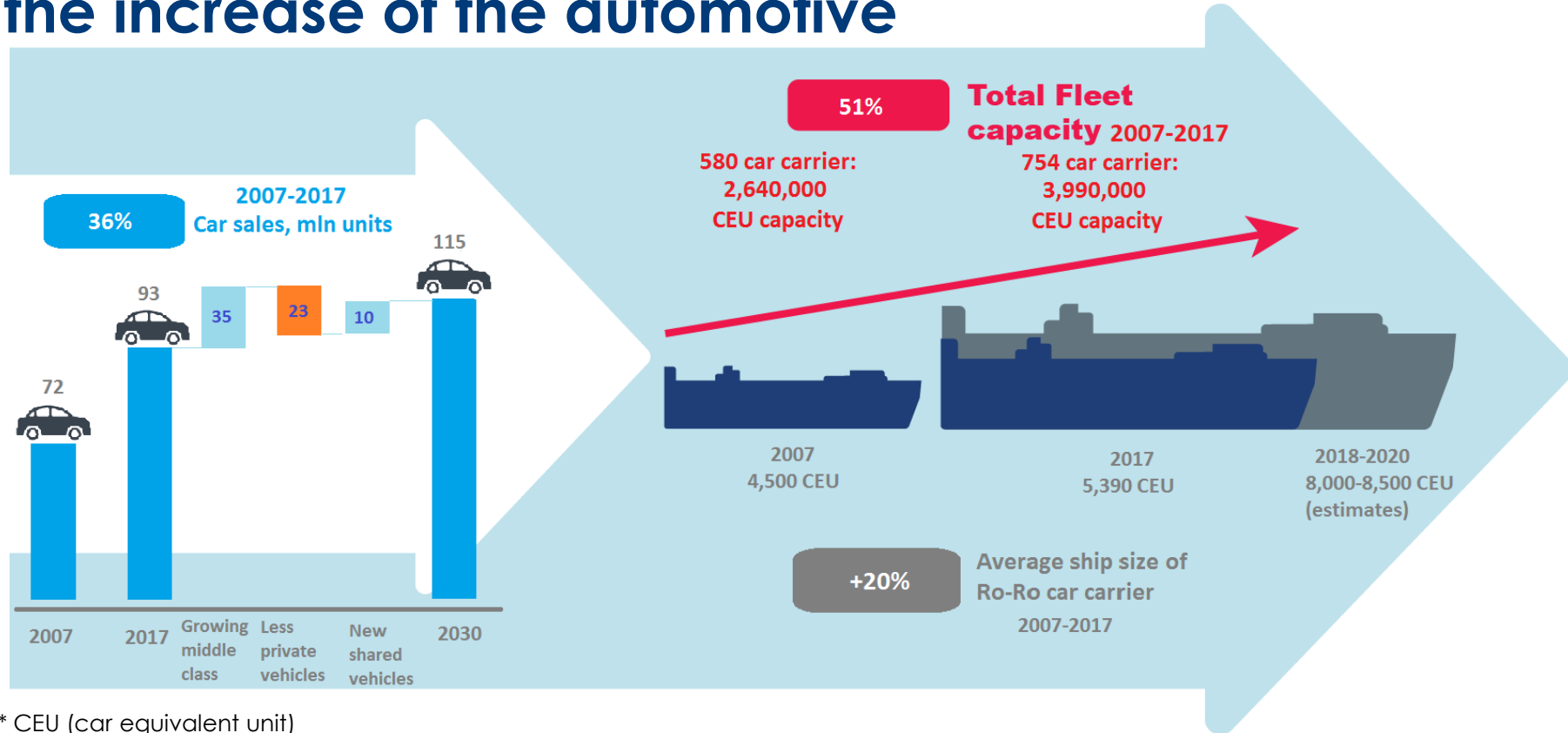
FORECAST INTRA-MEDITERRANEAN VEHICLE TRADE VOLUMES 2018-2022 (MILLION CEU)



■ 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)

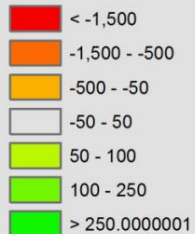
* Source: SRM on WWL, BRS Group, ANFIA, Fearnleys

Ro-Ro traffic in the Mediterranean Sea

Ro-Ro density map – 2012-2017 comparison

Ro-Ro - 2012-2017 comparison

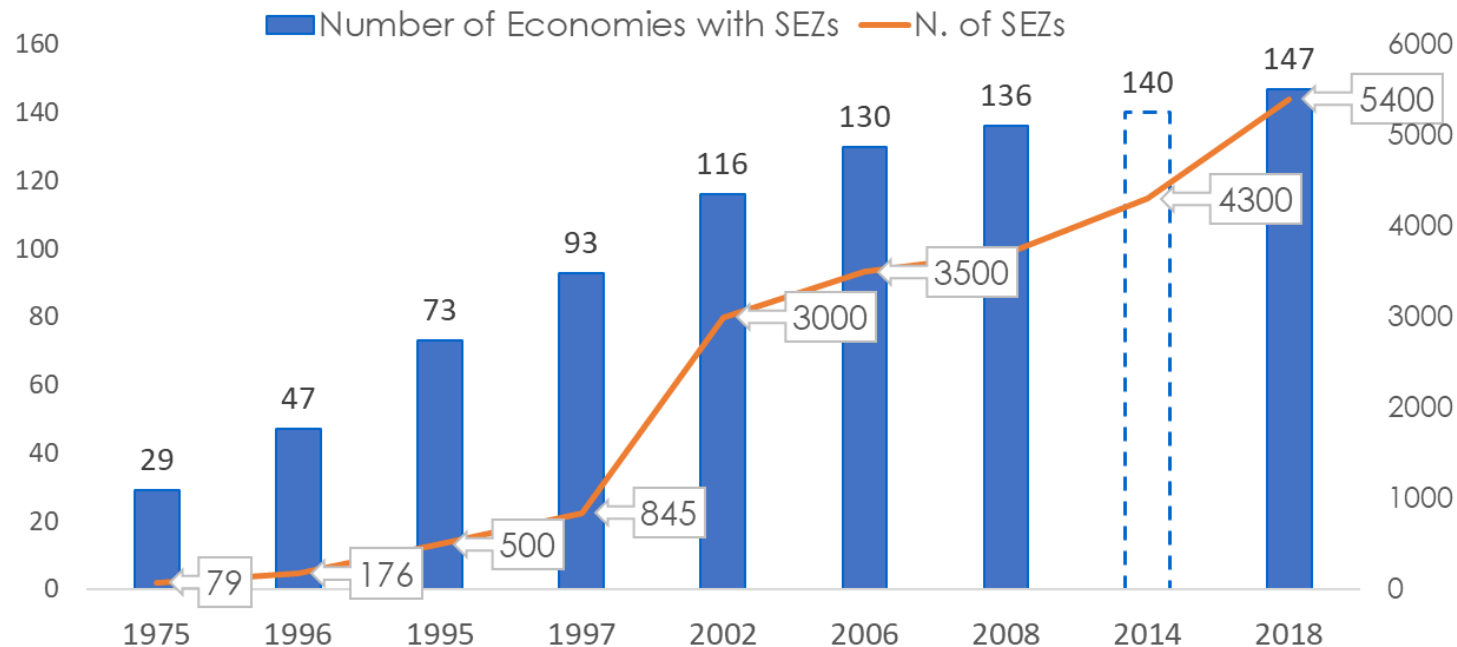
Number of vessels



0 250 500 750 1,000
Kilometers

Free Zones are growing...

16

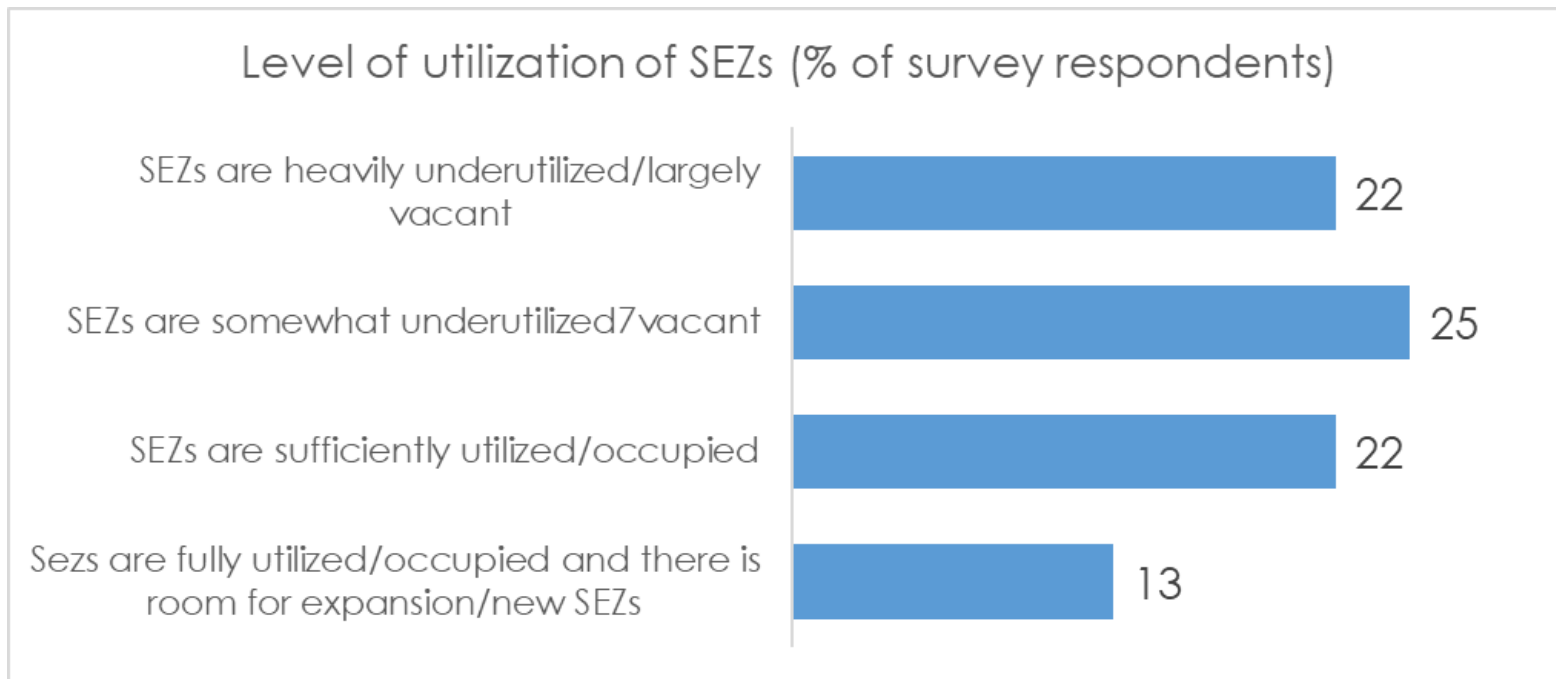


Source: SRM on UNCTAD 2019

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

Free Zones not everywhere are successful: level of utilization

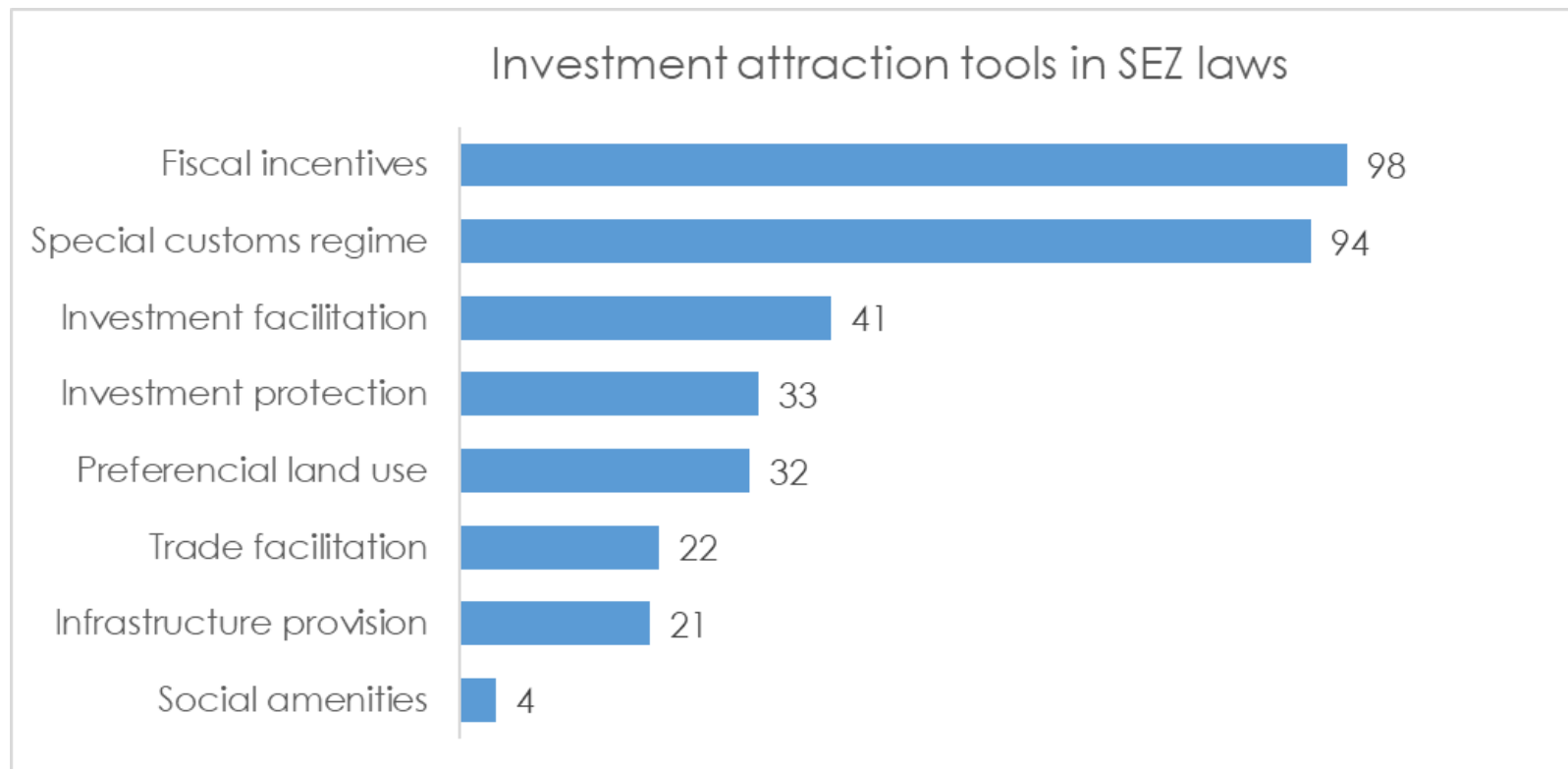
17



Source: UNCTAD Investment Promotion Agencies Survey.

How to attract investments in the SEZs

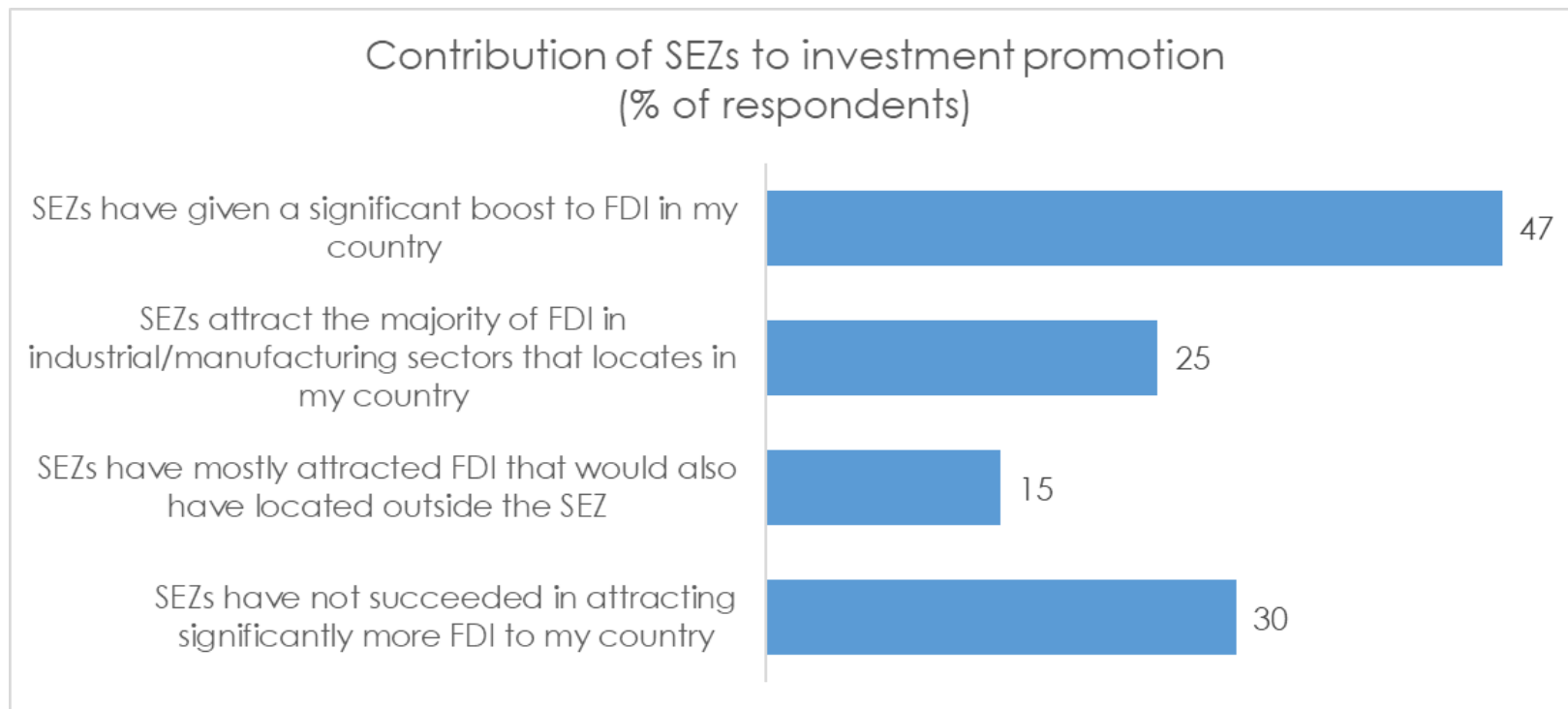
18



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



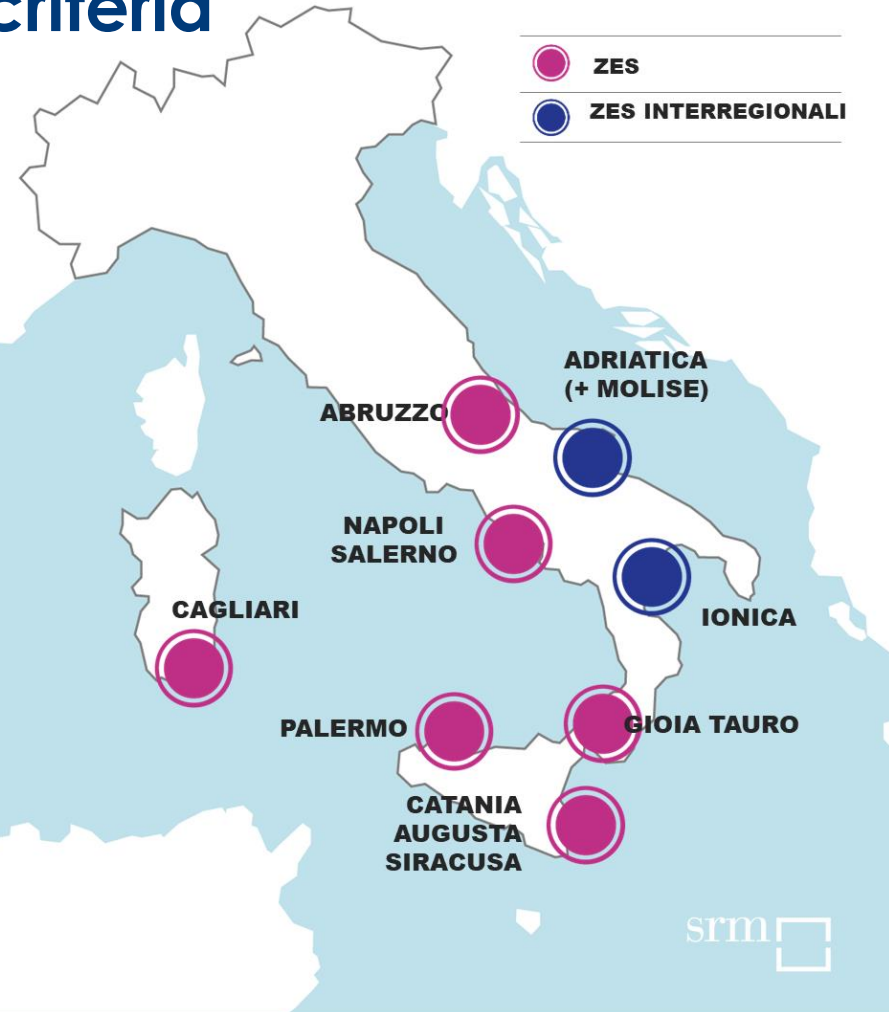
Special agreements with banks



Management Committee

 ZES

 ZES INTERREGIONALI



PORT 6.0

INTERNATIONALISATION

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

INTERMODALITY

- ▶ Department for intermodal traffic
- ▶ Local transport networks
- ▶ Monitoring of transport phenomena

TRAINING & ACADEMY

- ▶ Relations with universities and Centres of Research
- ▶ Study rooms for students
- ▶ Heritage of publications and databases



INNOVATION & START-UP

- ▶ The Port XL model
- ▶ Specialised expertise and incentives

FREE ZONE & TERRITORIAL MARKETING

- ▶ Plan for territorial development and attraction of investments
- ▶ Financial and bureaucratic incentives

SUSTAINABILITY

- ▶ Creating economic and social value and realising sustainable growth



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