

Covid-19: a challenge for Italian maritime transport

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Global Shipping Think Tank Alliance

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**Osservatorio COVID-19
sui Trasporti Marittimi
e la Logistica**

**maritime
economy**

Aprile 2020

A new Observatory about Covid-19 and its impact on Maritime Sector

- **International Scenario and Forecasts**
- **Analysis on Covid-19 vs Maritime import-export**
- **A Survey with maritime players**

Logistics and Maritime Transport: How Covid-19 will impact Trade and Economy

We will have a **decrease** in...

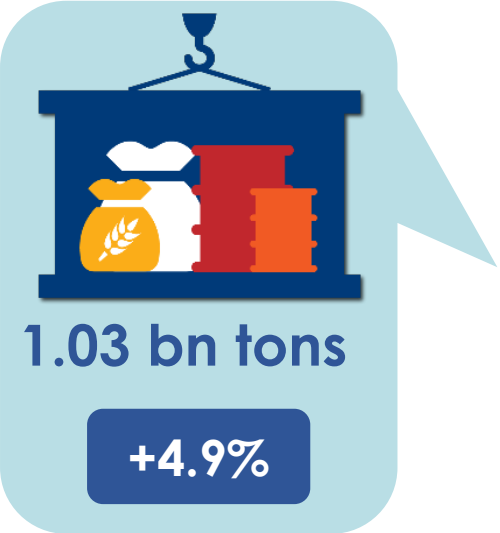
- **volumes** of national and international **cargo handled** by Italian ports (Container, Ro-Ro, Dry and Liquid Bulk)
- **Maritime import-export (in Italy, 250 billion Euros)**
- **Passenger** and **cruise traffic**

We will have also a **crises** of....

- small and very small **logistics enterprises** due to a lack of liquidity.

A brief outlook on the Med

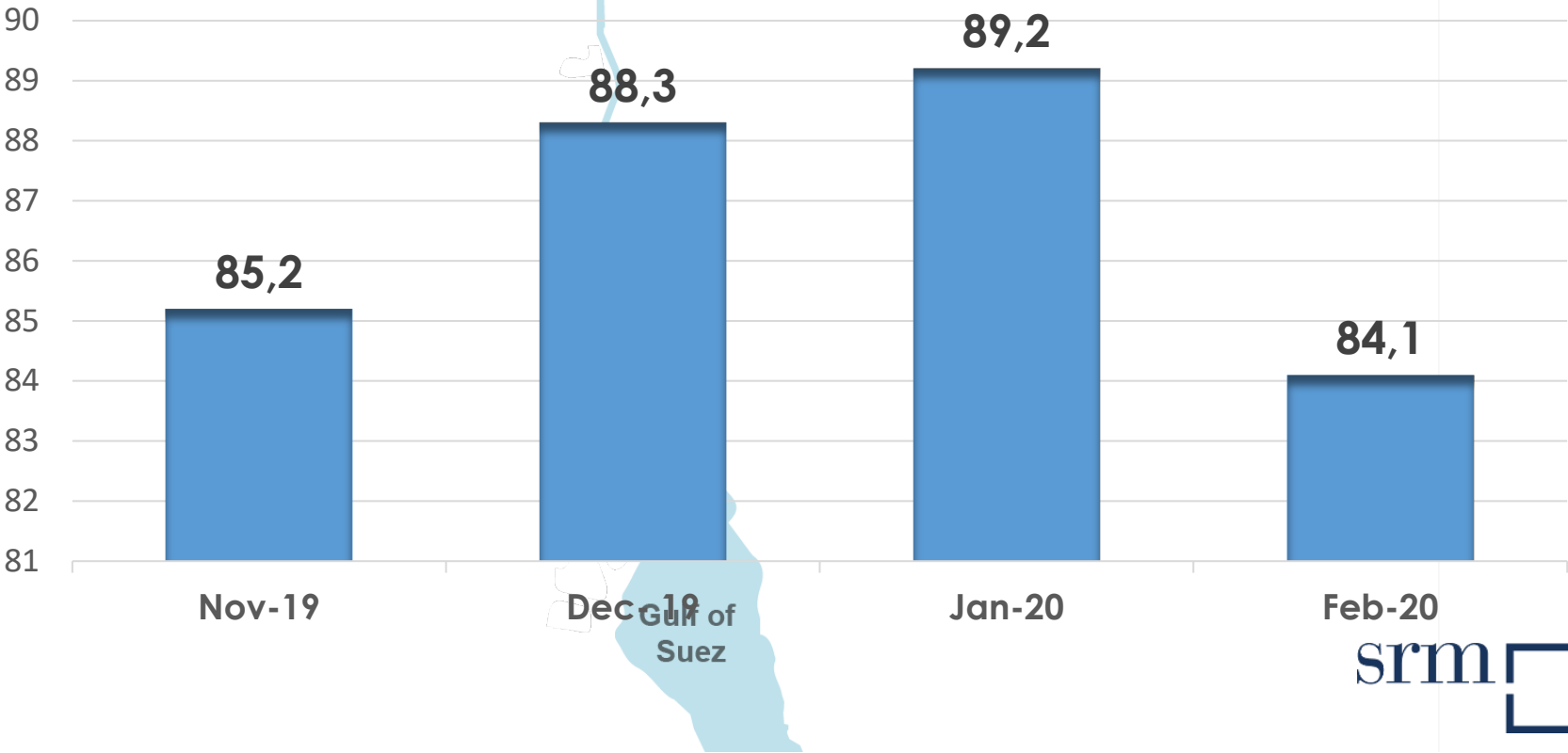
8-10%
Global Maritime trade



Mar. 20/Feb 20
Ships = -7.3%

Tonns = - 5.7%

Monthly traffic Suez (Nov'19-Feb '20) million tons

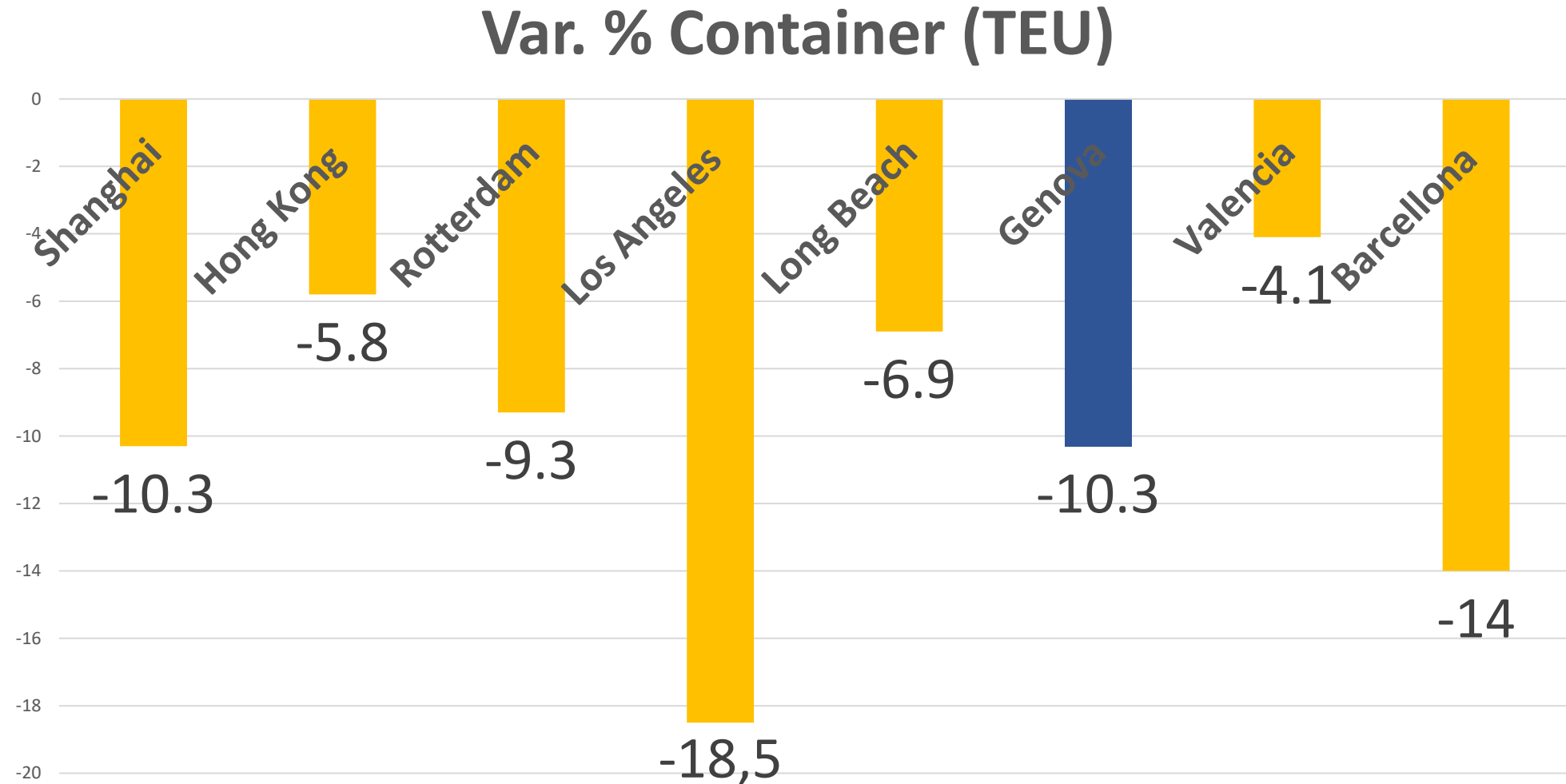


Source: SRM on Suez Canal Authority



Impact on some global ports: 1 Q 2020 results

5

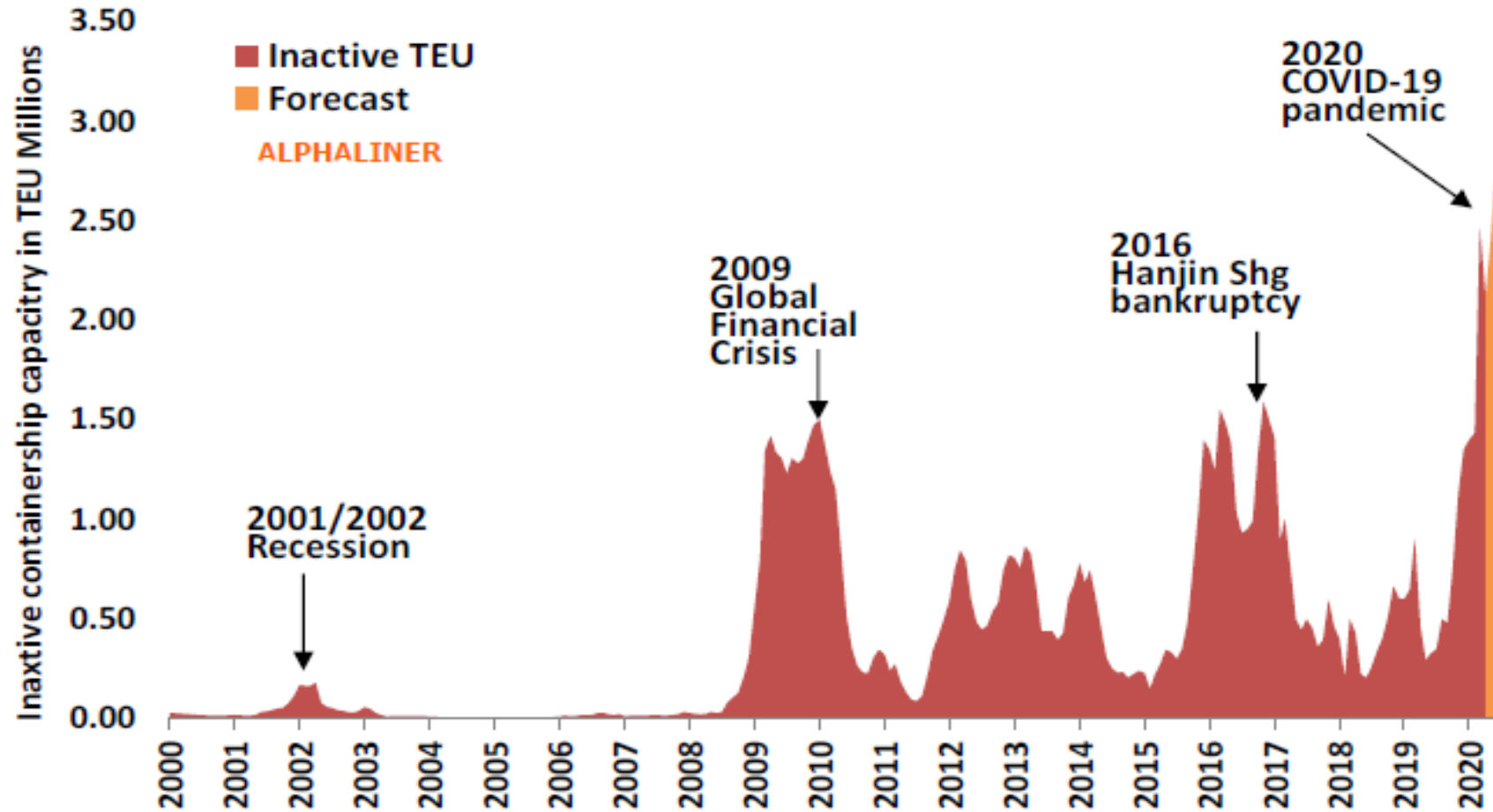


Source: SRM on Port Authorities

Blank Sailings

6

Inactive containership capacity 2000-2020(F)



The phenomenon of **blank sailings** will impact also on Italian ports.

SRM estimates that Italian ports could lose an amount of 90 million tonnes of goods in 2020.

The impact of Covid-19 on Italian ports

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According to SRM estimates, Covid-19 could lead to a **reduction** in Italian ports in **2020** of ...

CARGO

■ ... volume of **goods handled** of **-20/25%**.

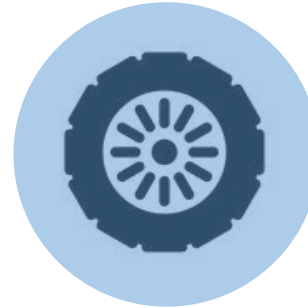
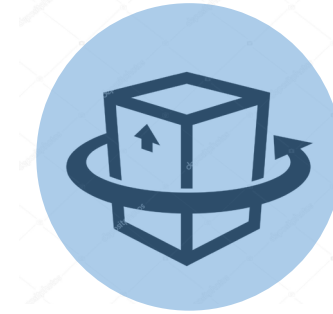
■ ... **Ro/Ro Car Carrier** of **-30%**.

PASSENGERS

■ ... **cruises** of **-70/80%**.

■ ... passenger **ferries** of **-15/20%**.

Source: SRM Survey



Impact of Covid 19 on maritime import-export: SRM's forecasts

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- The Italian maritime import export amounted approximately to **190 billion euros in 2019**
- SRM estimated for the end of 2020 in **two different scenarios** the impact of Covid on the import export by container
- Scenario A is **optimistic** and estimates that import export in June will begin to recover with a significant loss
- Scenario B is **pessimistic** and estimates that import export in September will begin to recover with a disastrous loss

Container maritime trade – Forecast 2020		
Scenario A	Economic recovery in June	-20 -22%
Scenario B	Economic recovery in September	-33 -35%

Fonte: SRM su dati Coeweb-Istat 2020

Logistics and Maritime Transport: How Covid-19 will Impact Trade and economy

SRM carried out a **survey** with **opinion leaders** and asked them **three questions about COVID 19**:

Theme 1

What do you think about the most **critical issues** ?

Theme 2

Sectors with a more **negative impact**

Theme 3

where do we **start from**?

Logistics and Maritime Transport: How Covid-19 will Impact Trade and economy

Survey's opinion leaders:

Assoporti (Italian Ports)

Confitarma (Italian Shipowners)

Confetra (Italian Logistics Companies)

Federagenti (Italian Ship Brokers and Agents)

Fedespediti (Italian Freight Forwarders)

5 Port Authorities (Genoa, Trieste, Bari, Naples, Taranto)

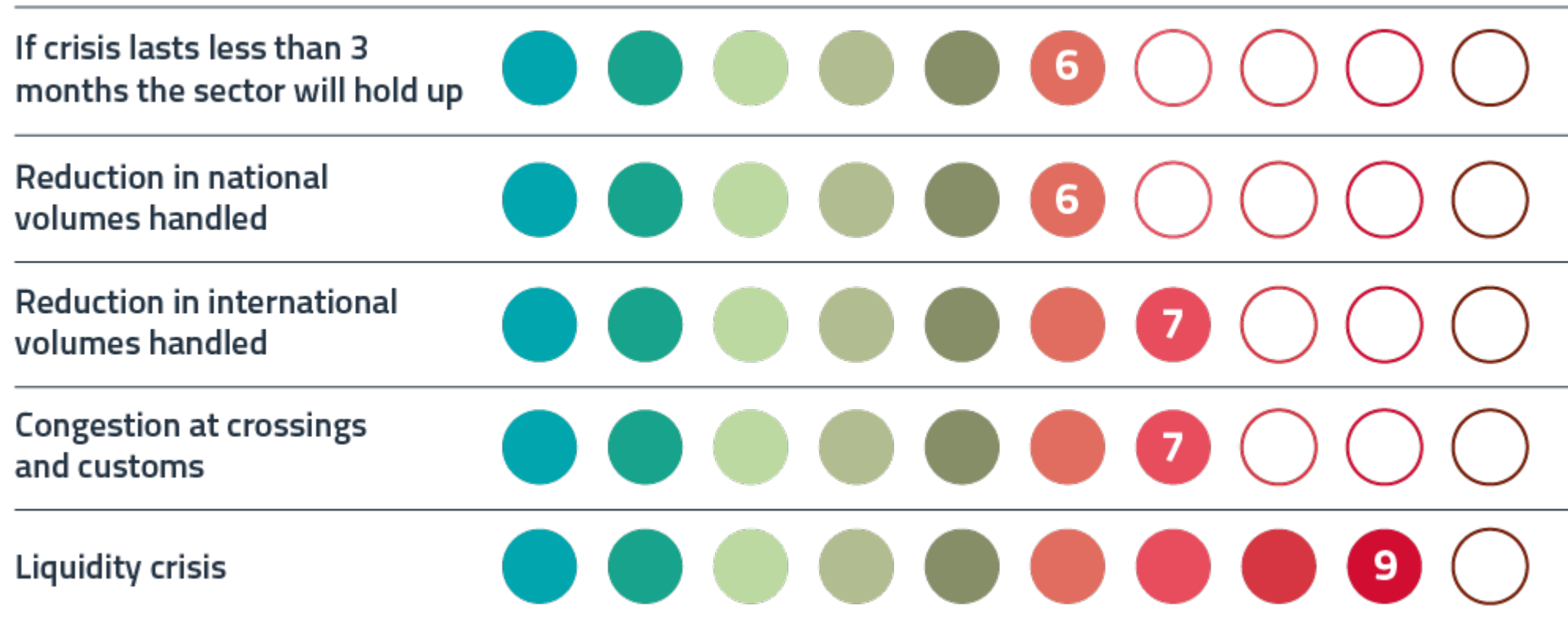
an evaluation of the answers was made

Theme 1

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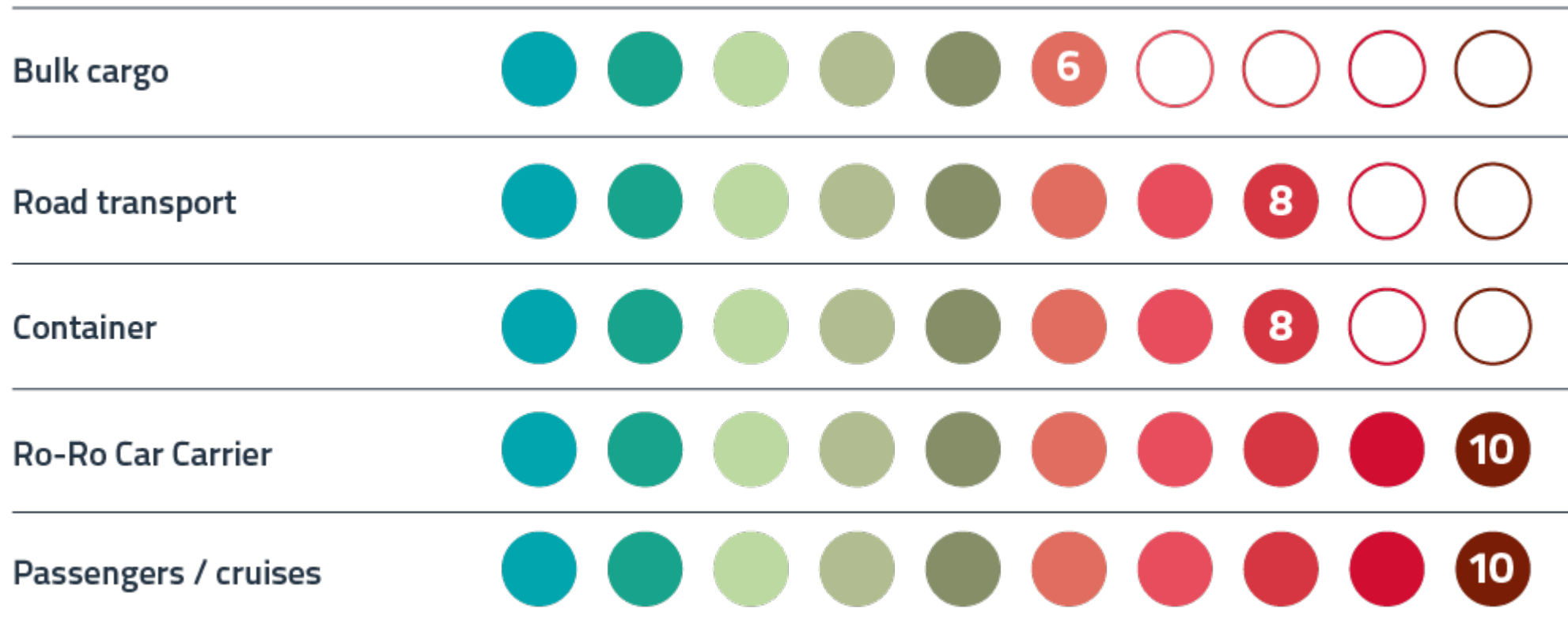
What do you think about the most critical issues?

Critical issues for Maritime & Logistics



Which sectors Covid has the most impact on

Higher impact sectors



Where do we start from?

Proposals of greater impact





Thank you for your attention

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