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molise ]

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**The Maritime Indicators for Abruzzo, Marche and Molise  
have been drawn up by SRM and are available at  
[www.srm-maritimeeconomy.com](http://www.srm-maritimeeconomy.com)  
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**SRM - Maritime Indicators Abruzzo, Marche and Molise**

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# [ Introduction ]

This publication represents the first issue of the **"Maritime Indicators"** collection dedicated to the regions of **Abruzzo, Marche and Molise**. The work is part of the "Maritime Indicators" regional papers carried out by SRM and inaugurated this year with a paper focusing on Campania's sea economy.

The maritime papers are concise and user-friendly periodical reports which provide an interpretative framework of the dynamics and the principal phenomena affecting the Italian maritime and logistics sector. The collection is characterized by a series of benchmarks – **Indicators** – useful to analyze the sector from a commercial, infrastructural and entrepreneurial point of view.

This analysis methodology (see page 23) was once again used to take a first step towards the creation of a "dashboard" of the logistics and maritime system of Abruzzo, Marche and Molise, a macro-area which for its centrality represents an important traffic hub between Eastern Europe and the rest of Italy. It suffices to say that more than 300 companies which collectively operate in the Sea "industry" – fishery, transport, logistics and tourism – and the sea born trade in the area, are worth €8 billion and up by 7,5%. These are only a few figures about the three Adriatic regions' Maritime Economy which, together with the analysis on the Motorways of the Sea, provides the first snapshot of a constantly active industry.

The report presented in this introductory section offers an overview of the maritime sector in the macro-area and proposes a detailed insight about the area under analysis while also displaying explanatory infographics and summary sheets with the main figures about the sector.

In particular, the study lingers on the port of Ancona with the pri-

mary objective to identify its most significant factors of competitiveness.

More in detail, the work pivots around three key indicators: **"International trade relations"**, **"Competitiveness"** and **"Companies"**. Each study of the three indicators represents a section of the report.

The first section offers an insight on trade, especially maritime, and underlines how this area of the country is strongly oriented towards foreign markets and provides an insight sorted both by country of destination and by commodity, which also includes a regional focus.


The second part deals with the competitiveness factors of the port systems of Abruzzo, Marche and Molise. The "Competitiveness" indicator regards the themes of port traffic in terms of volume of transported goods and of passengers/cruisers in transit; it also addresses the development of the Motorways of the Sea and the theme of intermodality, as the port of Ancona is one of the few ones on the Adriatic Sea - and more generally in Italy - to be connected to the national railway.

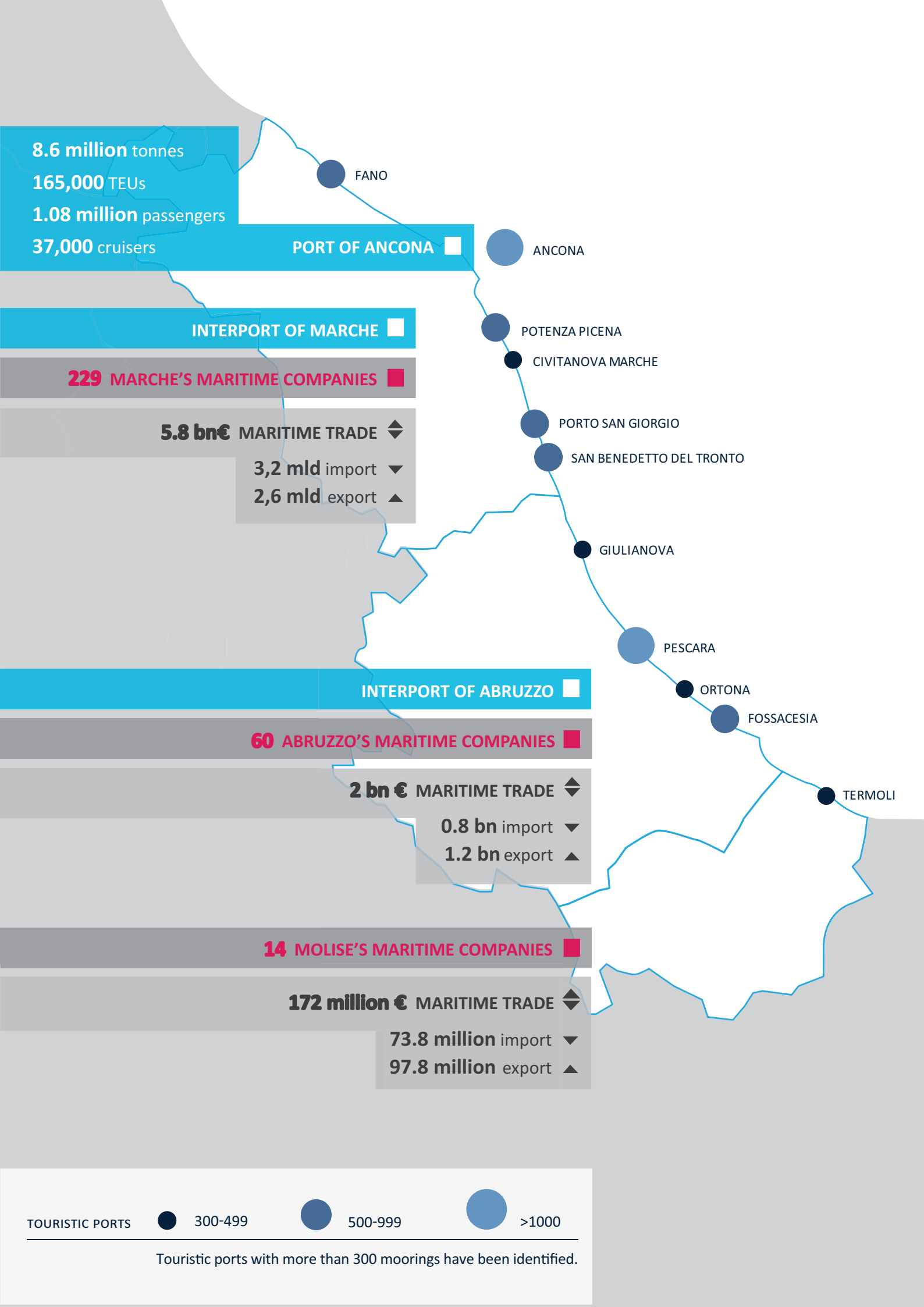
This second part also includes a focus on touristic ports given the importance of such offer in the area. Finally, the third part is centered on the analysis of the entrepreneurial fabric and focuses its attention on the regional maritime sector in terms of figures and revenues. In the first case, information about the type of companies and their three-year trend are reported to better show the "health" conditions of the sector. In the second case, instead, the focus is on the sales figures of maritime companies of Abruzzo, Marche and Molise.

Once again in our publications, the sea economy appears to be one of the most important assets

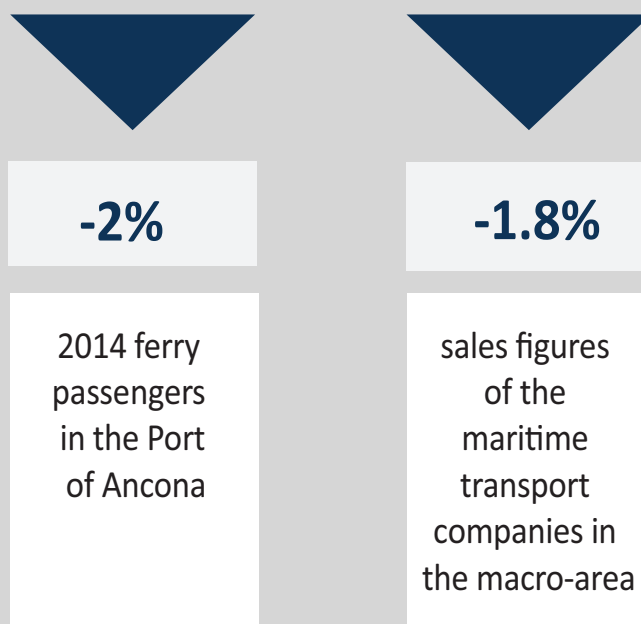
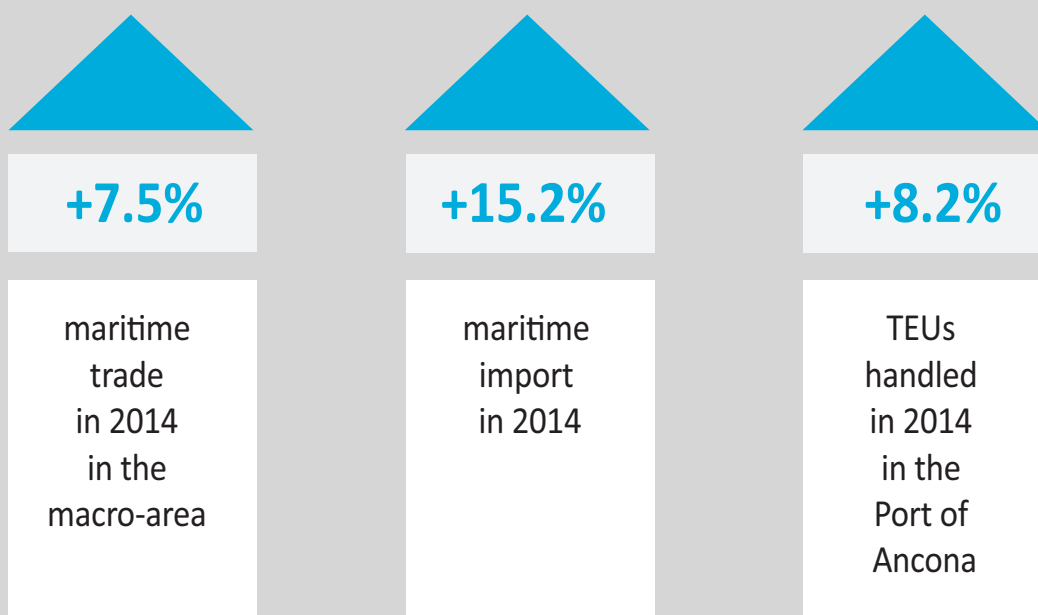
of Italian regions.

Therefore the collection and elaboration of data by SRM Observatory's aims at offering to the operators of the sector in the regions under analysis a balanced and precise overview. In fact, before providing the reader with a more detailed analysis, it has shown **an overview of the maritime and logistics system of Abruzzo, Marche and Molise** which includes its most significant figures and characteristics and **infographics about the trends recorded in the macro area**.

Here begins the first issue of the "Maritime Indicators" collection dedicated to the regions of Abruzzo, Marche and Molise. 



# [ Good and Bad ]



**The various sets of indicators analysed to investigate and better interpret the trends of the economy of the sea are illustrated below.**

1

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indicators

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**INTERNATIONAL  
TRADE  
RELATIONS**

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# [ Import-Export Trade ]

This set of indicators groups the short-term statistics as well as the trends of seaborne trade of Abruzzo, Marche and Molise. The data refers to 2014.

In 2014, the commercial trade of the three regions amounted to over €30.6 billion (which represents 23% of Central Italy's regions: Tuscany, Umbria, Lazio, Abruzzo, Marche and Molise; with an over-

rall €133.4 billion in revenue) up by 5.0% compared to 2013. 2014 figures comprises of 63.8% (about €19 billion) from Marche's trade (+6.1%), followed by Abruzzo with 33.8% (about €10.3 billion and up by +3.2% compared to 2013) and Molise (about €726 million, +4.1%). The area shows a strong orientation towards export which accounts for 65% of the total trade (an average of all three regions). In more detail, export is about €18.6

billion and increased by 5.9% while import amounting to €10.4 billion, grew by 3.4%.

The data shows that about 26% of the trade is seaborne, against 43% of trade which is transported by road. Trades amount to nearly €7.9 million which weigh by 3.6% on the total amount of the national maritime trades and by 22.5% on the correspondent overall amount of the Central regions (about €35.5 billion).

## Mode of transport in the macro-region trades (data in mln €). 2014

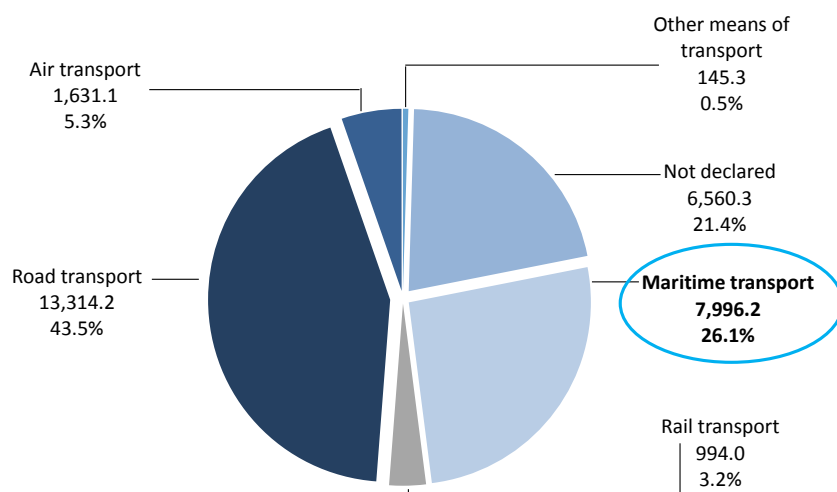


Figure 1 - Source: SRM on Coeweb data

## Trade by mode of transport sorted by region (data in mln €). 2014

	Marche	Abruzzo	Molise
Other means of transport	143,010,606	2,308,768	13,218
Not declared	4,482,823,686	1,874,525,735	202,956,237
<b>Maritime transport</b>	<b>5,818,796,154</b>	<b>2,005,788,153</b>	<b>171,592,510</b>
Rail transport	218,468,545	774,664,160	845,527
Road transport	7,712,839,351	5,263,201,473	338,110,236
Air transport	1,174,246,821	444,085,973	12,743,509
<b>Total</b>	<b>19,550,185,163</b>	<b>10,364,574,262</b>	<b>726,261,237</b>

Table 1 - Sorce: SRM on Coeweb data

Maritime import/export is particularly relevant in Marche where 72% of all the maritime import/export is concentrated, followed by Abruzzo with 25%. In terms of relative weight, maritime transport of each region accounts for 30% in Marche, 24% in Molise and 19% in Abruzzo.

From 2010 to 2014 the trend of maritime trade in the three regions was on average €7.7 billion (with the exception of 2011 when it amounted to €8.1 billion). Last year showed a +15.2% recovery of seaborne import (raised from 3.5 to 4.1) with a substantially stable level of maritime export. The volume of goods which in 2014 led to

a growth in the export of the three regions (as previously illustrated) are mainly transported by road which, in fact grew by +11% compared to 2013.

The non-EU European countries are the areas with which Abruzzo, Marche and Molise trade the most by sea by €1.7 billion (21.8% of the overall amount). This result is due to being in close proximity to the ports of the Adriatic-Balkan shores. East Asia (19.2%), Middle East (14.8%), North African countries (14.6%) and North America (10.7%) follow.

Between 2010 and 2014 commercial maritime relationships with the European non-EU countries

intensified (+11.3%), while the trades with East Asia and Middle East slightly decreased. Trade with North African countries also increased, by 3.3%.

An analysis of the types of traded goods (by their value) shows the prevalence of machinery and electronic products by about 23.3%. This is followed by 21% in coal and natural gas (due to the handling of coal by Enel in the port of Ancona), followed by the textile industry (10.8%), chemicals (8.8%), metal and metallurgical products, and subsequently by the food chain.

#### Abruzzo, Marche and Molise maritime import-export trend

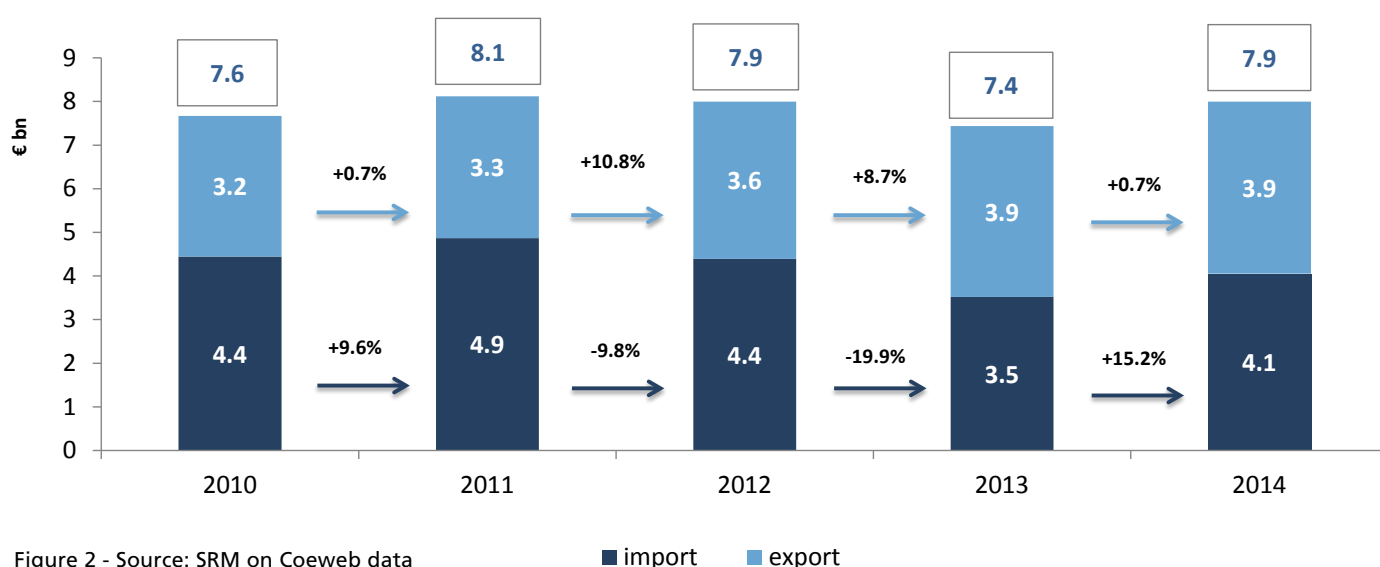


Figure 2 - Source: SRM on Coeweb data

#### Major geographical target areas in Marche, Abruzzo and Molise's maritime trades. 2014

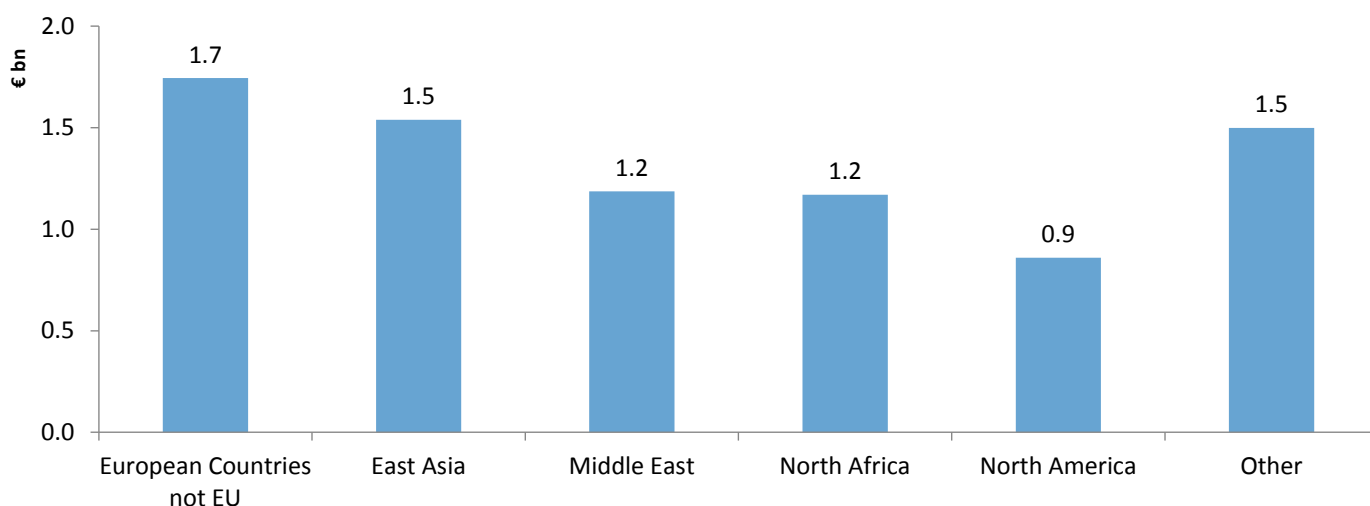


Figure 3 - Source: SRM on Coeweb data

**Trend of the principal geographical target areas in Marche, Abruzzo and Molise's maritime trades. 2010 - 2014**

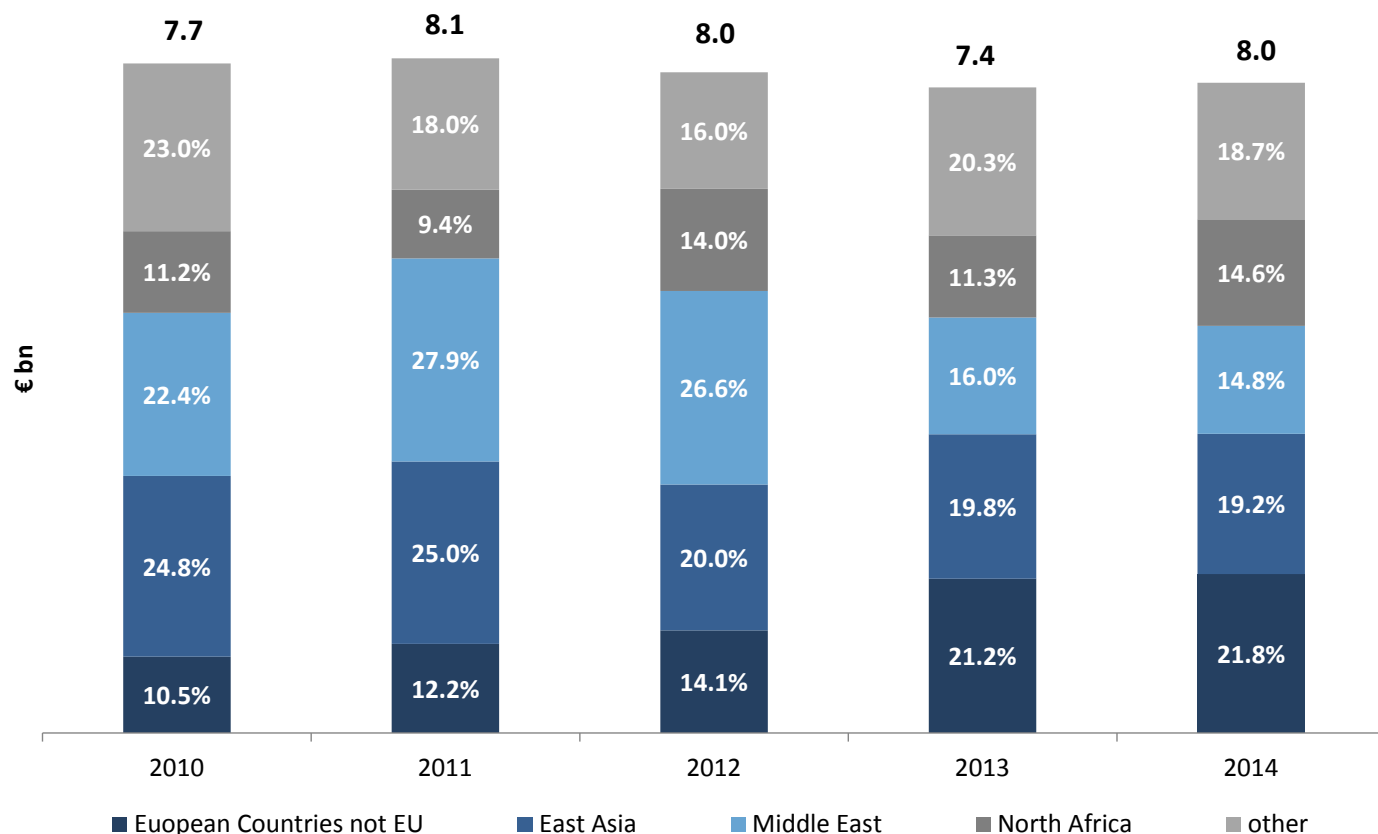


Figure 4 - Source: SRM on Coeweb data

**Principal commodity categories of Marche, Abruzzo and Molise's maritime trades. 2014**

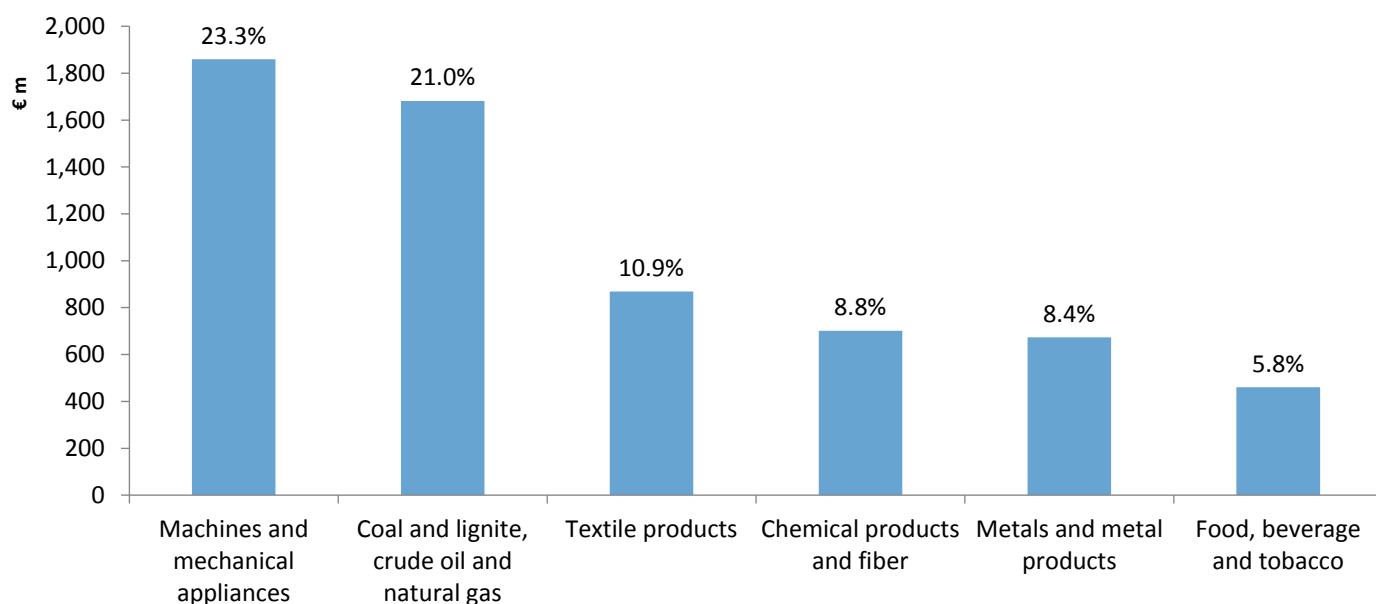


Figure 5 - Source: SRM on Coeweb data

The data contained in this set of parameters detects an increase in Marche, Abruzzo and Molise's maritime trades, mostly driven by an increase in the export of Marche. Despite the centrality of the port of Ancona in the Adriatic Sea, maritime transport accounts for about 30% of total freight.

2

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indicators

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COMPETITIVENESS

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# [ Motorways of the Sea and intermodality ]

Ancona was confirmed as one of the southern terminals in the Scandinavian-Mediterranean corridor within the TEN-T European transport networks which crosses the heart of Europe, connecting some of the principal productive and consumer centers of the continent, from Italy to Germany, following the Scandinavian peninsula and reflecting the continental route of traffic served by the Port of Ancona, through the

ferry lines in particular. The development of the Ro-Ro traffic and the potential capacity of handling trains are some of the distinctive features characterizing the Port of Ancona in terms of intermodality. The 2014 Isfort survey on a sample of truck drivers awaiting embarkation in the Port of Ancona shows that 71% of the road-sea traffic towards Greece originates abroad and chooses Ancona as its port of departure for the

final destination. Such percentage was also sorted by the geographical area of origin; 34% of the trucks travelling on the route towards Greece comes from Western Europe, 32% from Central Europe and 5% from Eastern Europe. The remaining 29% of the traffics originates in Italy.

Areas of origin in the Ancona-Greece trades. 2013 data

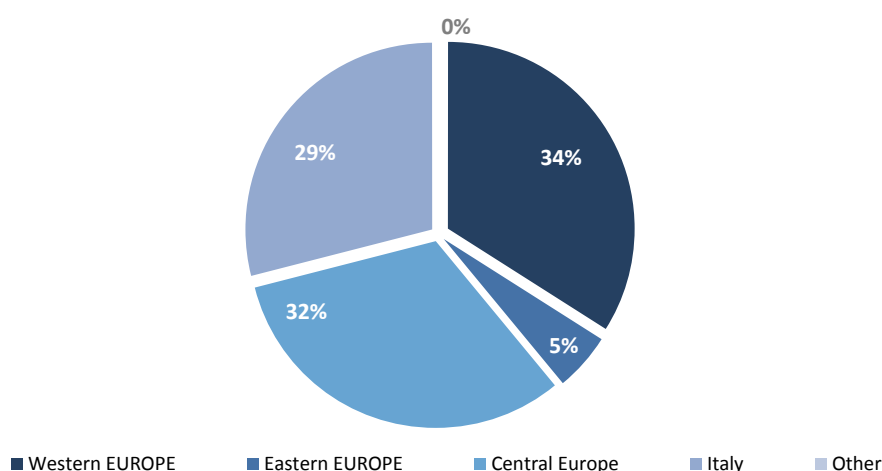


Figure 6 - Source: SRM elaboration on Autostrade del Mare 2.0-Isfort, 2014

The Port of Ancona is among the ports of the Adriatic Sea which are connected to the national railway network and experiences very short travel times (about 30 minutes) towards the regional logistic center of Jesi (22 km away). Nevertheless, the use of the railway only affects the activity of the port with trains carrying coal to the Enel plants in Umbria.

The port serves an area which exceeds the borders of its natural reference territory intercepting Ro-Ro flows which originate from/head towards France, Spain, United Kingdom, and Scandinavia towards Greece and Balkans. The Region, JESI logistic center, and Ancona's Port Authority are involved in the INTERMODADRIA project within the "Programma di cooperazione tran-

sfrontaliera (IPA)" (Adriatic Cross-Border Cooperation Programme) aimed at improving the integration of maritime short-range transport in the logistics chains which includes Adriatic ports and dry ports with different levels of accessibility to the inland transport infrastructure.

## Connections between ports and inland – a comparison

Port	Direct train connection to the main network	Presence of a Railway terminal in port	Minimum distance interports by rail	Presence of a logistics platform	Presence of Distripark
Ancona	YES	YES	30 min	NO	NO
Ravenna	YES	YES	60 min	NO	NO
Taranto	YES	YES	85 min	YES	NO
Bari	NO	NO	18 min	NO	NO
Venice	YES	YES	2 min	YES	YES
Trieste	YES	YES	53 min	NO	YES

Table 2 - Source: SRM's elaborations on "Rapporto Portualità" – Dipe, Dipartimento per la programmazione e il coordinamento della politica economica, Presidenza del Consiglio dei Ministri, 2014

# [ Port traffic ]

The objective of this insight is to evaluate the performance of the port systems of Abruzzo, Marche and Molise in terms of goods handled and passengers/cruisers transported. Given the characteristics and dimen-

sions of Abruzzo's ports (Pescara, Ortona, Fossacesia, and Giulianova) and of those of Molise (Termoli and the touristic port of Marina Sveva), the study focuses on the port of Ancona, core of the TEN network

in the Scandinavian-Mediterranean corridor. The latter is an important connection between the corridor and the south-eastern Motorways of the Sea towards Croatia, Albania and Greece.

## Handling of goods in the port of Ancona in TEUs. 2014 data

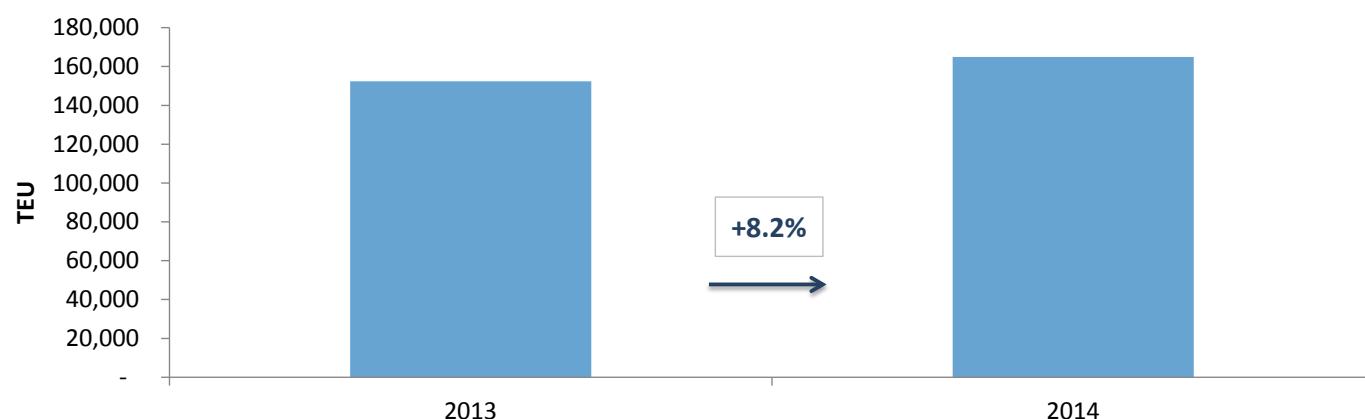


Figure 7 - Source: SRM on Port Authority data

In 2014 the Port of Ancona handled 164,882 TEUs, up by 8.2% compared to 2013. Not only has the positive trend which characterized this type of handling since 2009 been established, it even increased; by more than 50% from 2009 to 2014 (105,000 TEUs handled in 2009). The Figures released for the first quarter of 2015 confirm this positive trend compared to the same

period of the previous year (more than 37.000 TEUs).

In terms of tonnage, the Port of Ancona recorded about 8.5 million tonnes and a growth of 22% compared to 2013. It is mainly due to the result of liquid bulks (oil and derivatives) which accounts for 56% of the overall tonnes handled, and are ascribable to the near "API" refinery plant located

in Falconara.

Liquid bulk grew by 46% compared to 2013.

Goods handled by truck and trailer (Ro-Ro traffic) are the second main element of the freight traffic of the port (24% of the tonnes totally handled) and account for 2 million tonnes although slightly down (-2%) compared to the previous year.

## Bulk handling in the Port of Ancona. 2014 data

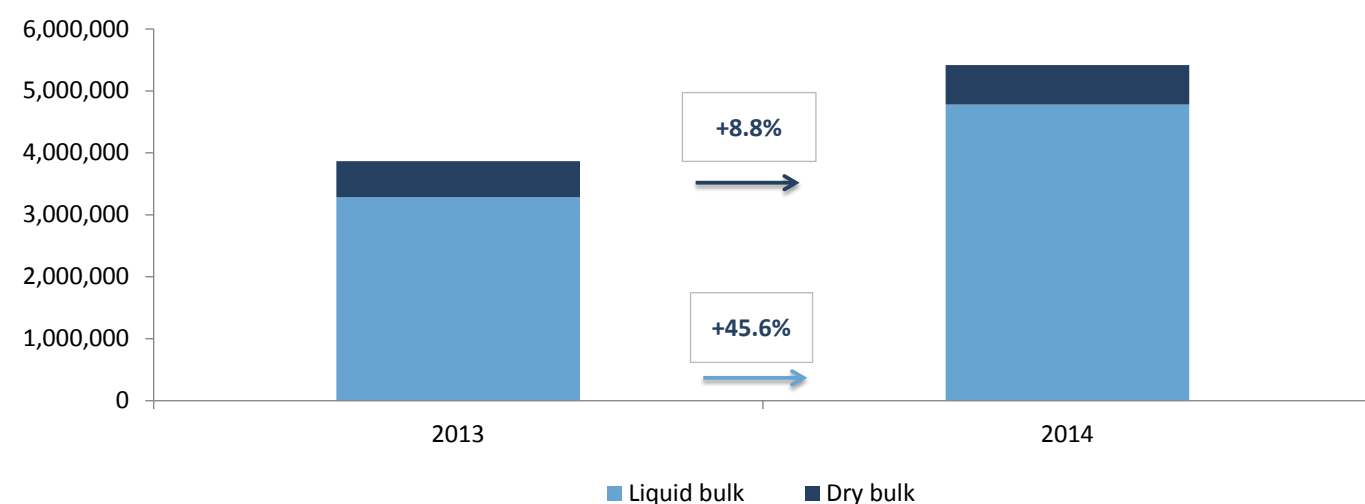


Figure 8 - Source: SRM on Port Authority data

The total number of trucks in transit (embarking and disembarking) in the Port of Ancona slightly decreased in 2014 in comparison with the previous year (about 118,000, -1.8%). Interestingly, as illustrated in the graph, the composition of the Ro-Ro traffic in the Port of Ancona and its evolution from 2012 to 2014 demonstrates the importance of the routes to/from Ancona with Greece, Croatia, and Albania and, over the last year, with Turkey. The presence of trucks to/from Italy is certainly insignificant, mainly due to the lack of Ro-Ro cabotage routes which demonstrates a preference for road transporta-

tion instead of the road-sea transport on national routes. However the first quarter of 2015 recorded a positive trend for trucks and trailers in the Port, for a total amount of 533,208 tonnes (+15%). Heavy vehicles amounted to 33,541 (+16%), 30,000 of which were in transit on the route to and from Ancona-Greece. The truck and trailer traffic to/from Albania is strongly growing (2,078 vehicles, +88%). As for passenger traffic, in 2014 the Port of Ancona saw about 1.08 million passengers (down by 8% compared to 2013) almost entirely ascribable to the departures and

arrivals from the ferries to/from Greece, Croatia, Albania. Cruisers increased from more than 100,000 in 2013 to a little less than 30,000 in 2014 due to the interruption of service by Costa Crociere. As regards the ferry traffic, the slight decrease is due to the route to/from Croatia which accounts for 25% of ferry transits while recording a 21% drop mitigated by the positive performance of the relationship between Greece, (+5% and 726,000 passengers per year) and Albania (+23% and about 56,000 transits).

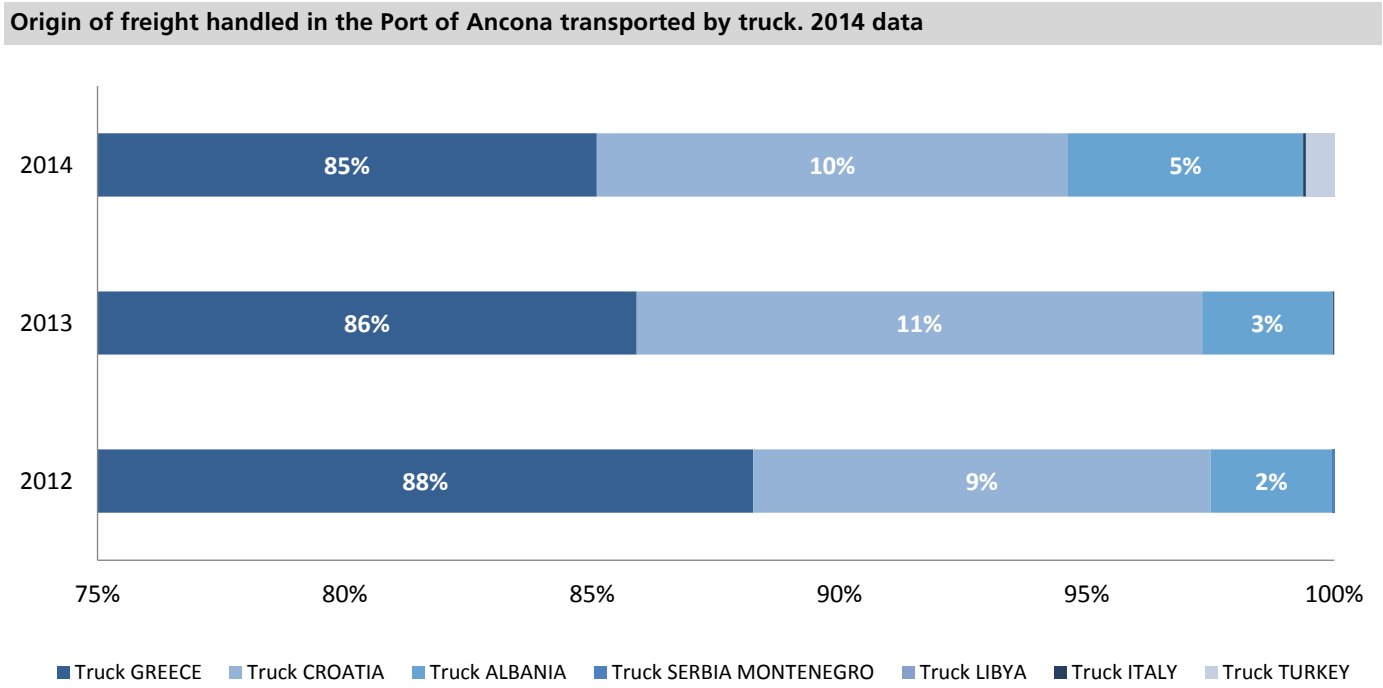


Figure 9 - Source: SRM on Port Authority data

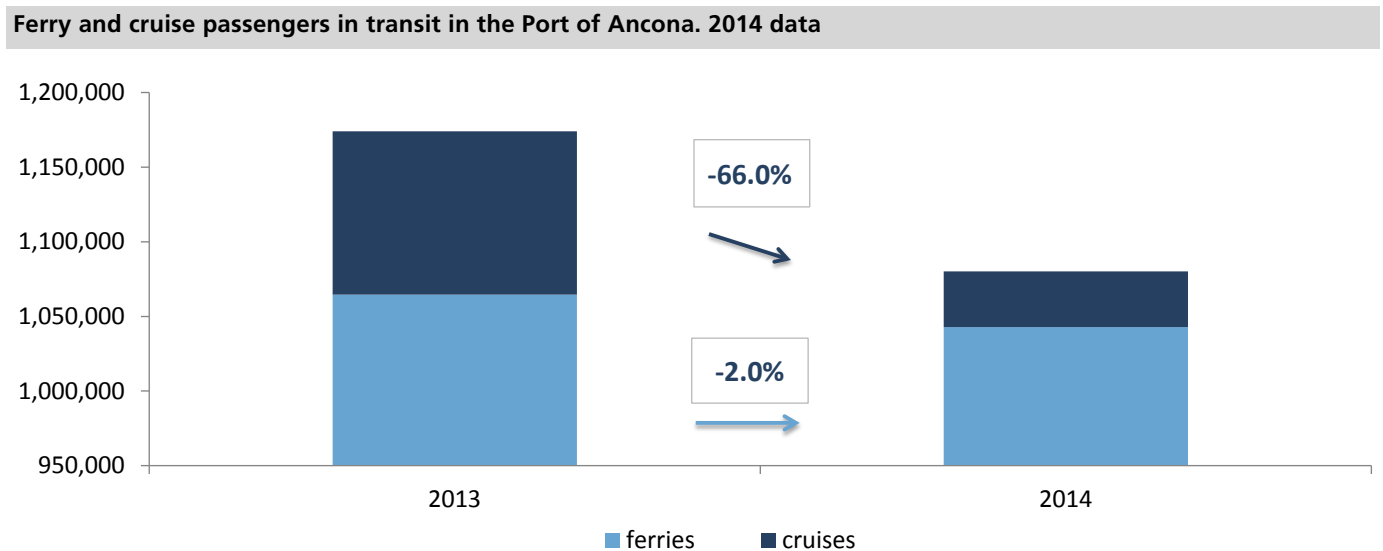


Figure 10 - Source: SRM on Port Authority data

# [ Tourist ports ]

Abruzzo, Marche and Molise feature a good number of infrastructures for yachting.

The 3 regions collectively host 9030 moorings; 60% in Marche, 33.8% in Abruzzo and 6.2% in Molise. The Indices of overcrowding of the 3 re-

gions are lower than the value of Central Italy (80.5) and of Italy in general (70).

Hence the data shows that infrastructures are able to meet a demand which could be higher than the current one. In confirmation

of this, the number of moorings per km of coastline of Marche and Abruzzo is higher than the national value (19.2) but lower than the one of Central Italy (29).

**Figures of yachting in Abruzzo Marche and Molise – Data to 31.12.13**

Region	Mooring	Moorings exceeding 24 m	Weight on Central Italy	Yachts recorded per 100 moorings (overcrowding index)	Moorings per km of coastline
Abruzzo	3,049	18	8.5%	30	22.1
Marche	5,393	46	15%	62.9	28.7
Molise	588	5	1.7%	9.7	16.3

Table 3 - Source: SRM on Ministry of Infrastructure and Transport, 2014

The focus on the trend of the port systems of Abruzzo, Marche and Molise in 2014 shows a positive performance of Ancona compared to 2013.

The Port of Ancona, in fact, is an important hub on the Adriatic shore for the sea-road intermodal traffic chosen by a significant share of operators to/from abroad. In 2014 about 71% of the road-sea trade towards Greece originated abroad and chose Ancona as its departure port.

Particular attention should be paid to the infrastructural work programme of PRG and to the technical and functional adjustments aimed at the enlargement of the port areas and the improvement of the accessibility from both the seaside and the dry port, and the optimization, retraining and specialization of the existing spaces. These works outline a new configuration of the port particularly towards access from the sea, through the building of a downwave breakwater, and the realization of a straight quay longer than 900m (14 m deeper). Lastly, the project is completed by the adjustment and the filling of the existing sediment tank in order to allow the construction of new aprons and a lateral quay. Once the project will be realized, the new port areas will comprise of about 2 hectares of aprons, more than 1,000m of quays and a depth of 14m.

As regards the touristic port, the macro-area shows a good infrastructural potential.

3

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indicators

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COMPANIES

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# [ Companies of the maritime cluster ]

This group of indicators refers to the data relating to the number of companies belonging to the maritime cluster, sorted by type. Data refers to the first semester of 2014.

The overall number of companies of the maritime cluster in Abruzzo,

Marche and Molise is 995 and accounts for about 4% of all the Italian companies in the sector. The companies of the maritime cluster represent 19.0% of the companies of the Regions of central Italy (about 1,590 companies), 16.1% of all the companies of Italian Regions lining the Adriatic shores (about 1,880 companies)

and 4.4% of all Italian companies. In terms of weight, repair companies in the area (80) are particularly significant representing 43% of the repair companies of Central Italy, 38% of repair companies of the Adriatic coast and 11% of those of the entire Italy.

**Distribution of the companies of the maritime cluster by type of business – I semester 2014**

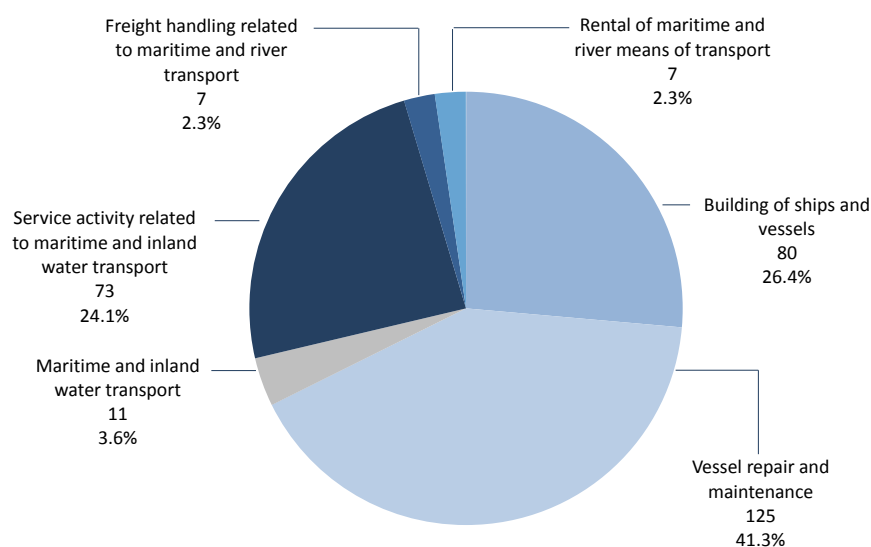


Figure 11 - Source: SRM on Unioncamere data

**Distribution of the companies of the maritime cluster by region - I semester 2014**

	Building of ships and vessels	Vessel repair and maintenance	Maritime and inland water transport	Service activity related to maritime and inland water transport	Freight handling related to maritime and river transport	Rental of maritime and river means of transport	Total by region
Abruzzo	4	21	2	24	3	6	60
Marche	76	99	8	41	4	1	229
Molise	0	5	1	8	0	0	14
<b>TOTAL</b>	<b>80</b>	<b>125</b>	<b>11</b>	<b>73</b>	<b>7</b>	<b>7</b>	<b>303</b>

Table 4 – Source: SRM on Unioncamere data

## The weight of the companies of the maritime cluster of Abruzzo, Marche and Molise on the national total – I semester 2014

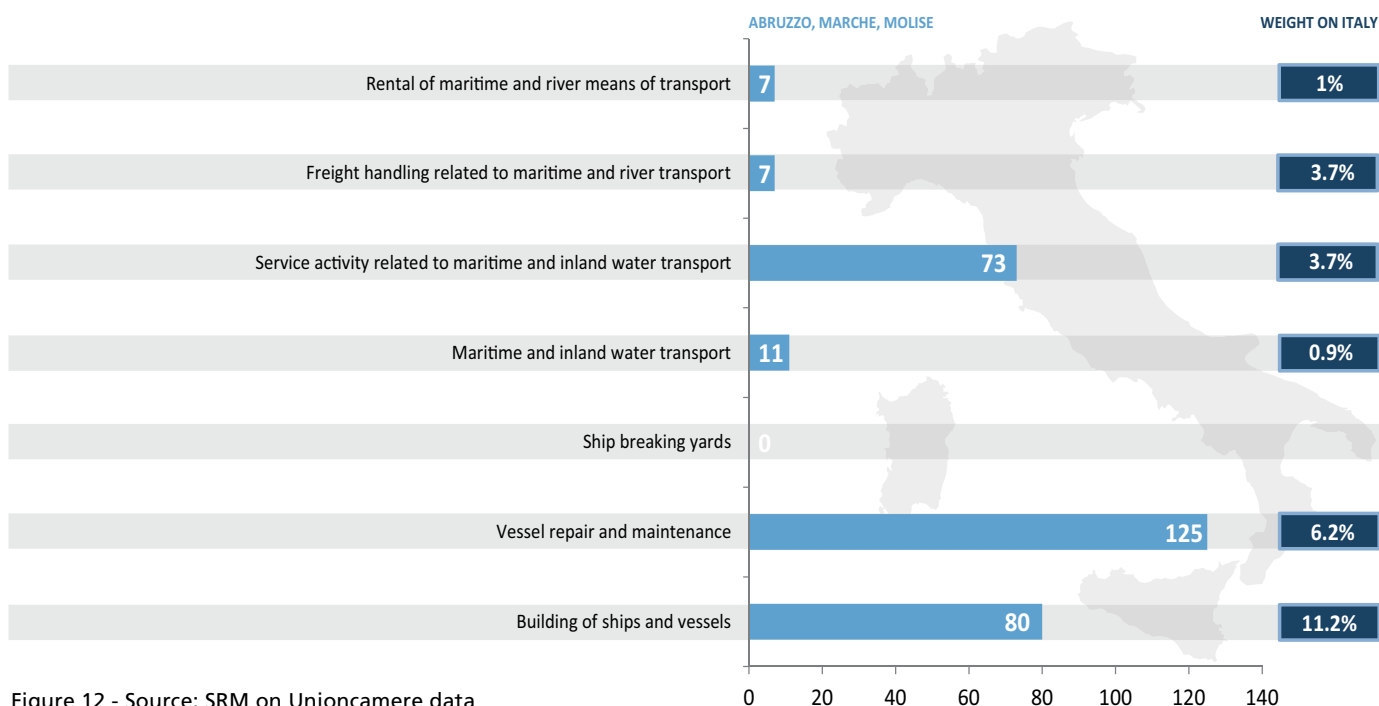


Figure 12 - Source: SRM on Unioncamere data

## Companies of the maritime cluster of Abruzzo, Marche and Molise (2011-2014)

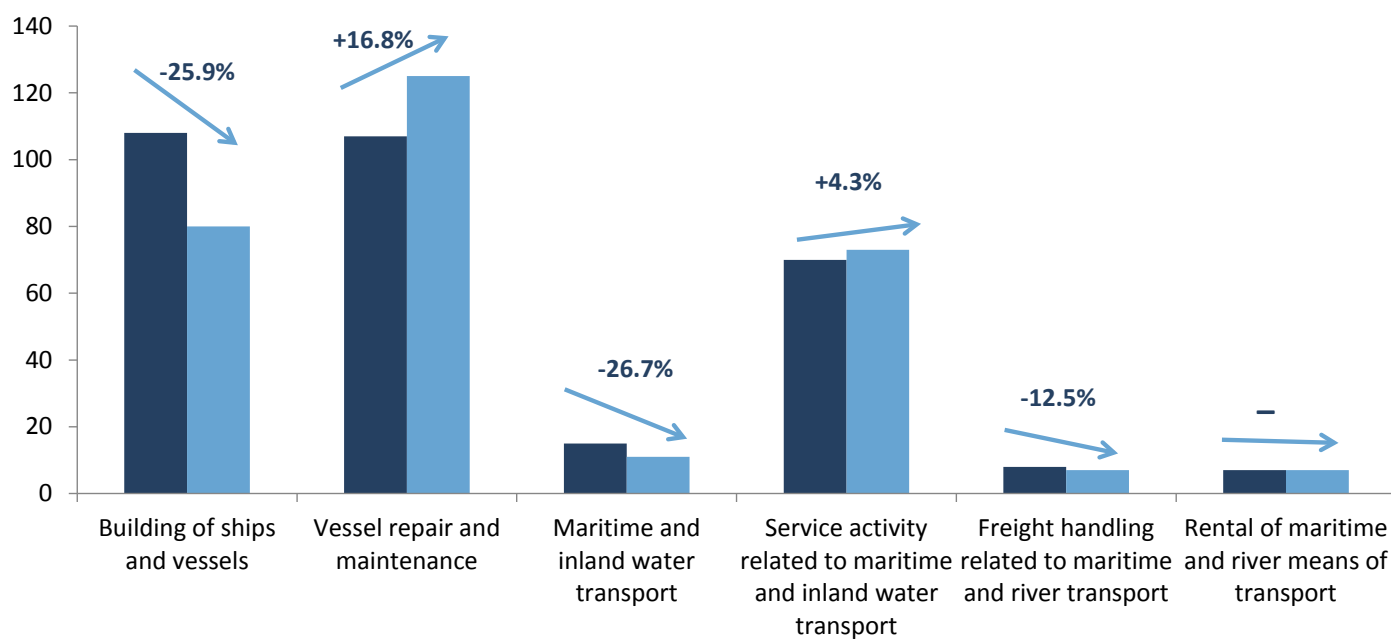


Figure 13 - Source: SRM on Unioncamere data

■ 2011 ■ I sem 2014

In comparison with data from 2011, companies belonging to the maritime cluster of Abruzzo, Marche, and Molise are dropping by 3.8% (-2.5% is the national

percentage while -0.6% refers to Central Italy), mitigating the double-digit decrease recorded in the building sector (-25.9%), in maritime transport (-26.7%) and

in freight handling (-12.5%). The only plus-sign regards vessel repair and maintenance companies (+16.8%) and the maritime transport related services (+4.3%).

The data regarding companies of the maritime cluster shows the difficulty of recovery of the Italian economy and reveals a reduction in the number of companies both on a national and on a regional (Abruzzo Marche and Molise) level.

## Turnover of companies of maritime transport of goods and passengers

This set of indicators - whose calculations are based on the queries from the SRM databases - allows us to perform an analysis on the turnover of companies in maritime transport (freight and passenger),

with detailed information on the trend and on their concentration in the area. The following findings result from the query of the AIDA bureau van Dijk database and extrapolating amongst the maritime

companies with registered offices in Abruzzo, Marche and Molise, those with an available budget (and revenues at least equal to zero) for the years 2011, 2012 and 2013. It is a sampling analysis.

**Trend of the overall turnover of maritime goods and passengers transport companies of Abruzzo Marche, and Molise. 2011-2013**

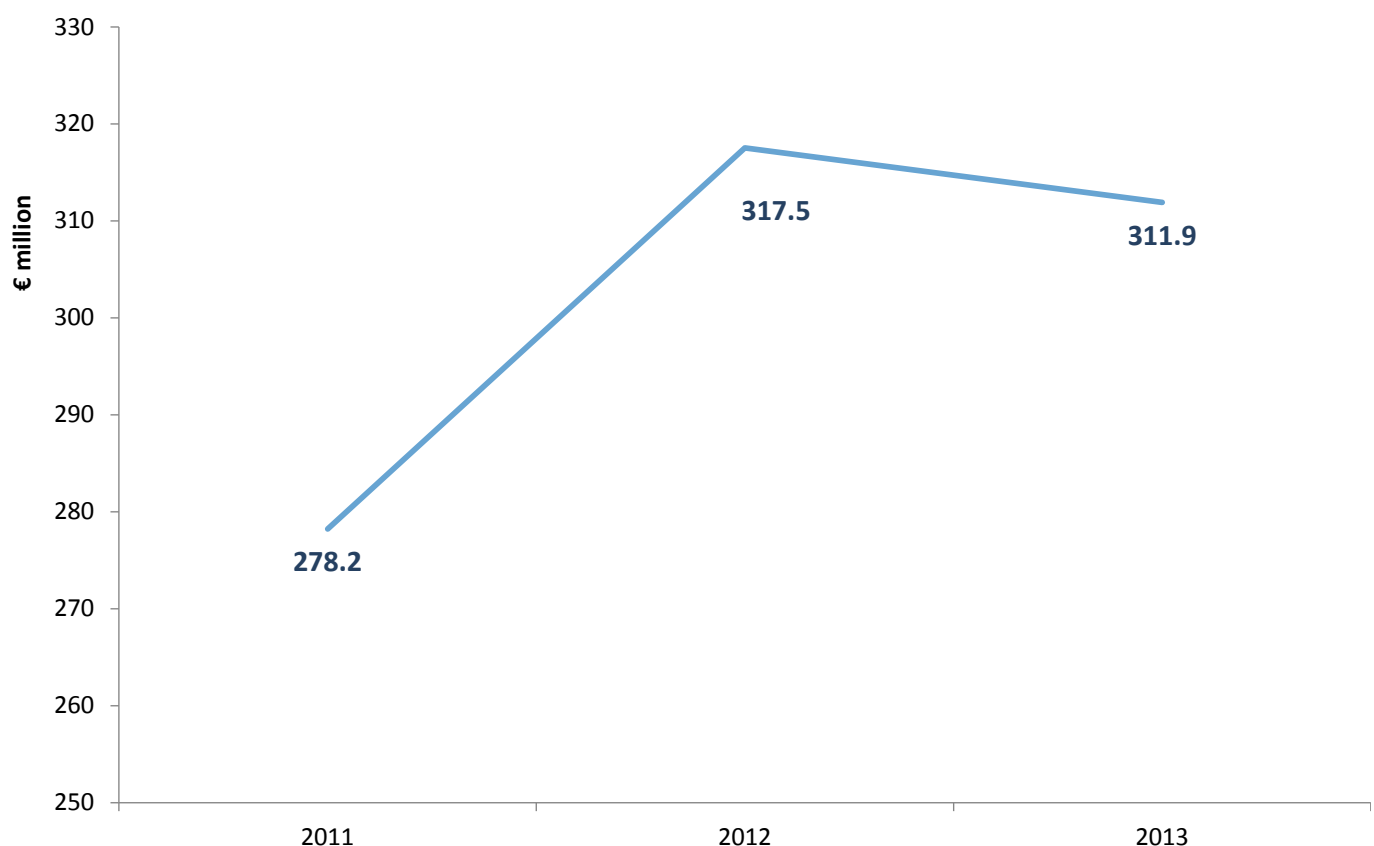


Figure 14 - Source: SRM on AIDA Bureau van Dijk data

The study of the trend of overall turnover of the sample of companies in the maritime cluster (142 companies with available budget in the three-year period and revenues at least equal to zero) shows, during the years under considera-

tion, a good performance of the companies; in 2012 the turnover amounted to €317 million, up by 14.1% compared to 2011, while in 2013 it dropped by 1.8% and the turnover amounted to €311.9 million.

By examining the distribution of the turnover by region, it emerges that almost the entire value, 96% is attributable to the companies of Marche, 3% to those of Abruzzo and the remaining 1% to Molise's.

The data referring to the turnover of maritime companies with registered offices in Abruzzo, Marche and Molise proved the system was substantially steady in 2013, with only a slight decrease compared to the previous year.

## [ A Global View ]



The indicators taken into account by SRM's Observatory demonstrate that maritime trade in Abruzzo, Marche and Molise expanded, driven by the growth of maritime import, which, by the end of 2014 recorded +15.2% compared to 2013. Maritime export instead, remained substantially stable. However, in the regions under consideration, maritime transport has a considerable weight (equal or higher to 20%) on trade.

Actually, less than 30% of the total trades travel by sea, but the favourable position of the Port of Ancona on the Adriatic coastline and the attention paid towards the development of intermodality, allowed significant improvements. The focus on the trend of the port systems of Abruzzo, Marche and Molise in 2014 draw attention to the good performance of the Port of Ancona compared to the value of 2013. In 2014 about 71% of the road-sea traffic towards Greece originated from abroad and chose Ancona as its departure port.

As regards the touristic port, the macro-area shows a good infrastructural potential.

Data in reference to the companies belonging to the maritime cluster of Abruzzo, Marche, and Molise show a trend similar to the national one and highlights a slight reduction in the number of companies, especially in shipbuilding, although repair and servicing companies also increased. 76% of the companies of the maritime cluster is in Marche.

The data referring to the turnover of maritime companies proved the system was substantially steady in 2013 with only a slight decrease compared to the previous year.

## [ Notes on Methodology ]

**“Maritime Indicators Abruzzo, Marche and Molise”** is a publication of SRM; a periodical report which analyses the maritime economy through a series of indicators whose purpose is to provide an interpretative key of the dynamics and the various phenomena which characterize the maritime sector in the Italian regions Abruzzo, Marche e Molise. Then the analysis focuses on the **port of Ancona** with the primary objective to identify the parameters which determine its competitiveness.

The aim of SRM's publication, in particular, is to offer a new and unique tool to the business operators in these regions, with detailed and constantly updated analysis at a territorial level. The news contained in the publication regards both the infrastructures and the companies.

This issue in particular contains some reference parameters – **Indicators** - which represent a first step towards the creation of an economic “dashboard” for the Transport and Maritime Sector in Abruzzo, Marche and Molise; and to offer an interpretation of its dynamics and to the various phenomena which characterize it. Therefore they can

be considered as instruments capable to identify the possible ways for the development of the sea economy in these regions starting from their ports.

The parameters which have been chosen aim at investigating the economic trends in sea transport from an economic, infrastructural and entrepreneurial point of view.

The indicators are grouped into 3 categories: **“International trade relations”**, **“Competitiveness”** and **“Companies”**. Each series of indicators includes tables, graphs and figures which are considered to be particularly representative for analyzing the regional context and, if possible, to evaluate the placement of the macroarea in the competitive national context, and in that of the Center of Italy.


The analysis originates from an evaluation with an international scope of the trend of international trade by sea, which highlights the weight over the total amount of the national trades, the imports-exports trend, the main reference areas and the most frequently traded goods.

As for the **“Competitiveness”**, the parameter for analysis chosen regards, instead, the development

of the Motorways of the sea and intermodality, as the Port of Ancona is one of the few ports on the Adriatic coast, and in Italy generally, which is connected to the national railway network. As regards the passengers segment, the analysis focuses on tourist ports in the area and provides an insight about the number of available moorings.

Lastly, the analysis of the entrepreneurial fabric focuses on the sector of the regional maritime transport in terms of figures and turnover.

In the first case, information about the type of companies and their three-year trend are reported to better show the “health” conditions of the sector. In the second case, instead, the attention is put on the companies’ turnover with in depth-analysis concerning the trends and the companies’ legal status.

The data that the Observatory contains are gathered and processed by SRM based on different national and international databases; for this reason, it may have a different date of updating that is specified from time to time. 

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