

ITALIAN MARITIME TRANSPORT: IMPACT ON THE ECONOMIC DEVELOPMENT

Scenarios, sea traffic analysis and case studies





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GIANNINI EDITORE

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The data supplied were updated in April 2013.

Editing and editorial design: Marina RIPOLI (SRM)

Cover design: Ciro D'ORIANO

ISBN - 978-88-7431-675-5

2013 © Giannini Editore

Napoli - via Cisterna dell'Olio, 6/b

www.gianninieditore.it

Published by



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ACKNOWLEDGEMENTS

Special thanks for the collaboration go to ASSOPORTI, with which SRM signed a specific memorandum of understanding aimed at the joint working up of studies and investigations, as well as the holding of interviews with personalities from the maritime transport world. Thanks go to the President, Luigi MERLO, to the Past President, Francesco NERLI, and to Dr. Tiziana MURGIA.

Thanks also go to the Genoa branch of the BANK OF ITALY for the collaboration in the editing of the research; special thanks to the Director, Letizia RADONI, and to all the researchers of the *Territorial Economic Analysis and Research* office.

Thanks to the President of CONFITARMA, Paolo D'AMICO, for participating to the SRM presentation of the preliminary study on shipping during the event *Martedì in Terrazza* (Tuesdays on the Terrace) held at the Banco di Napoli. During the event, valuable information and comments were collected for the improvement of the work.

Special thanks for their support go to Giuseppe CASTAGNA (General Director of the BANCO DI NAPOLI), Luigi MONCERI (General Director of the BANCA DI CREDITO SARDO), Antonio NUCCI (Regional Director of INTESA SANPAOLO for Piedmont, Aosta Valley and Liguria) and to the *Desk Shipping* experts of MEDIOCREDITO ITALIANO (INTESA SANPAOLO Group).

Special thanks for the collaboration and willingness go to IPE, Institute for research and educational activities. In particular, to Prof. Antonio RICCIARDI, Director of the Training Institute Masters and to Dr. Andrea IOVENE, Project Manager.

Thanks for their collaboration in the editing of Chapter VI of the research "The economic scenarios: results of a territorial survey" go to Valeria CARNOVALE, Simona DE FEO and Federica GIORLEO, students of the 2012 edition of the IPE Master "Shipping: Finance, Logistics and Business Strategy." This Chapter was the subject of the Project Work presented at the same Master.

During the research, privileged viewpoints were also collected from institutions, industry associations, companies and infrastructures, which contributed to provide added value and allowed to carry out a more detailed analysis of the sector; special thanks to everybody from SRM and the researchers who supervised the work.

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Thanks for their collaboration also to:

Silvia COPPOLINO (PORT AUTHORITY OF TARANTO) Fiorinda CORRADINO (PORT AUTHORITY OF NAPLES), Vanna COSLOVICH (PORT AUTHORITY OF TRIESTE), Emanuele D'AGOSTINO (CONTSHIP ITALIA), Laura DOMINGO PARDO (PORT AUTHORITY OF BARCELONA), Silvia MARTINI (PORT AUTHORITY OF GENOA), Paul MEDUGNO (MAERSK ITALIA), Riccardo PODESTÀ (LIGURIA RICERCHE), Teresa PUGLIESE (MEDIOCREDITO ITALIANO, INTESA SANPAOLO Group).

NOTES:

Notwithstanding the care and responsibility of SRM in the drawing up of the whole research, please note that Chapters from I to VI were edited by SRM; Chapter V – Case study No. 1 – by Ennio FORTE, Erica PIGHETTI, Lucio SIVIERO; Chapter V – Case study No. 2 – by Enrico BERETTA, Alessandra DALLE VACCHE, Andrea MIGLIARDI; Chapter V – Case study No. 3 – by Giacomo BORRUSO and Giuseppe BORRUSO. See page 155 for further details.

*To those who with ideas,
works and actions contribute to
the social and economic development
of Southern Italy, through a
European and Mediterranean vision*

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PREFACE

In recent years, profound and important changes have affected the socio-economic tissue of Italy; in particular, phenomena such as the globalisation, the liberalisation of the markets, the increasing demand for internationalisation of companies and, last but not least, the advent of a severe economic and financial crisis that is affecting and changing, among other things, the structure of the world trade, have occurred.

These changes have affected and are affecting significantly the role of maritime transport which now has carved out a leading position in the economy. In this context, Italy is called to face new trading, economic and productive challenges in order to reach those levels of competitiveness that are required to "stay in Europe" and to compete with the Asian and Atlantic trading giants, more than ever, with a crisis.

According to SRM, one of the starting points can be strongly represented by investment in the sectors in which the Italian economy has a consolidated know-how and history, and it is in this context that we should place the importance of the maritime sector, seen as a vital link in a chain of integrated logistics.

With this perspective, a new research on the development of Italy's "sea economy", with particular reference to shipping, has been carried out and introduced in the international context. SRM comes then back on a key issue for the development of the country, considering that it should be among the priorities of Italian national growth strategies, with the South at the fore.

In recent years, while significantly affected by the current crisis, shipping has continued to innovate, to invest and contribute increasingly to the internationalisation of the Italian manufacturing system. But that is not enough; especially in the container sector, shipping is strongly characterised by the presence of large foreign carriers - Danish, German and Eastern companies - which indicates that the business and the turnover are more and more interesting, as well as that stronger trade relations are being activated, providing more opportunities.

Shipping is continually evolving: new routes, new ideas to create innovative ships; think of the sea highways, of the increasingly structured Ro-Ro ships and of an important fleet such as the Italian one, the youngest in the world. But also of new and existing insidious competitors, especially at a port level, ready to attract Italian traffic, including North Africa, Spain and the Northern European emblem (with Rotterdam, Hamburg and Antwerp) that, conscious of the opportunities offered by the sector, are investing more and more in the maritime economy.

In Italy there are critical issues. First of all, a bureaucratic system whose complexity represents a serious obstacle to business investment; but certainty about the funds available for the development of infrastructure is also needed, along with a medium to long-term proper planning of the country's maritime sector development in which shipping, together with ports, represents one of the peaks of excellence.

Moreover, phenomena like the naval gigantism (larger and larger vessels crossing our seas and docking in our ports), are not new. Naval gigantism involves the need for increasingly equipped facilities, as well as for faster and more efficient unloading and

distribution services, without considering that the increase of trade in the global economy and changes in the cargo handling techniques require increasingly wide spaces.

The research has therefore immediately underlined the structural and economic aspects of sea transport, providing guidance on the competitiveness of the sector which would require even greater attention on the part of institutional bodies, to enable the achievement of standards of facilities and services equal to those of the main European competitors. In short, we ought to think to maritime transport more and more as a strategic asset of the country and then plan its growth in a wise and structured way.

The Southern economy is an economy in which the greatest attention must be paid to the solution of structural problems that still affect growth but, now more than ever, these constraints have to be dealt with according to a strategic view, in the context of a comprehensive and systemic panorama of the interventions and development processes that require promotion.

Thanks to all the research team for completing this important work that aims at representing a contribution of SRM to those who work for a healthy and widespread development of Italy, in order to make the country more competitive in Europe.

Paolo SCUDIERI
President of SRM

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Printed in Naples
at Officine Grafiche Francesco Giannini & Figli SpA
in May 2013

The research investigates the economic and strategic aspects of the Italian maritime transport, which SRM considers as one of the driving sectors of the country's growth.

The work starts out by analysing the sector both at national and international level, providing data and statistics on the generation of sea traffic, on the abundance of the fleet, on the sector development areas and on the strengths and weaknesses of maritime transport, without neglecting aspects related to the presence of strong, insidious, foreign competitors both among ship owners and in terms of logistic and port installations.

A specific section is dedicated to the analysis of the Med Area, with particular reference to North Africa, where new opportunities will be developed in the next few years for our companies and infrastructure. The survey continues focusing on Italy's maritime commercial interexchange relations, with a detailed description of the "target" countries and the most dynamic areas where the industry is insisting. The research shows that Italian shipping could be more appreciated if the regulatory and bureaucratic constraints that make it difficult to build infrastructure and are burdensome for companies wishing to invest, not only to expand their business, were removed. The innovation and internationalisation of the manufacturing system are two possible paths to follow in order to stimulate our sea system which, together with the resumption of investment in port infrastructure, can be the factors for the crisis exit strategy; all this with a comprehensive vision.

Three focuses are presented to provide significant case studies to the reader wishing to penetrate, in a way by no means exhaustive, specific areas which are considered strategic for the country. They are dedicated to the maritime ship-owner cluster of the Campania Region and to port of Genoa and Trieste, three "engines" of our sea economy.

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