

ITALIAN
PORTS
ASSOCIATION



srmm

Port Infographics

maritime
economy

1 2019

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I dati della pubblicazione hanno vari livelli di aggiornamento.

La consultazione delle fonti è aggiornata a febbraio 2019.

Le analisi contenute nella ricerca non impegnano né rappresentano in alcun modo il pensiero e l'opinione dei Soci fondatori ed ordinari di SRM. Lo studio ha finalità esclusivamente conoscitiva ed informativa, e non costituisce, ad alcun effetto, un parere, un suggerimento di investimento, un giudizio su aziende o persone citate.

Le illustrazioni e le infografiche presenti nello studio sono da intendersi come immagini e non come mappe, per cui l'equivalenza delle aree e dei confini potrebbe non essere rispettata.

Sono consentiti l'uso e la riproduzione della pubblicazione ai fini scientifici e di analisi, solo citando espressamente la fonte:

SRM & Assoporti - Port Infographics

Un nuovo mondo marittimo...

La nuova newsletter realizzata da Assoporti e SRM inizia da questo numero con un nuovo concept. È stata, infatti, interamente realizzata attraverso l'uso di infografiche.

L'obiettivo è quello di offrire al lettore visione immediata del fenomeno oggetto di analisi e delle principali statistiche ad esso collegate.

Si entra così in un nuovo mondo marittimo composto da dati e informazioni che vengono visualizzati in modo innovativo e originale e non solo in formato numerico e/o

attraverso uso di grafici di tipo "classico".

È questo un segnale di crescita del prodotto di ricerca, sempre apprezzato dagli operatori che da questo numero vuole affermarsi attraverso un formato che è rivolto sempre più a dare valore aggiunto alle informazioni.

SRM e Assoporti intendono, infatti, proporre uno stile sempre più fruibile e al servizio degli operatori della portualità e della logistica che così possono disporre di dati e statistiche aggiornate, ma anche di chiavi interpretative dell'economia del mare che resta la protagonista assoluta delle analisi.

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l'anno dei record
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Henk de Bruijn,
Rotterdam
Port Authority**

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2018

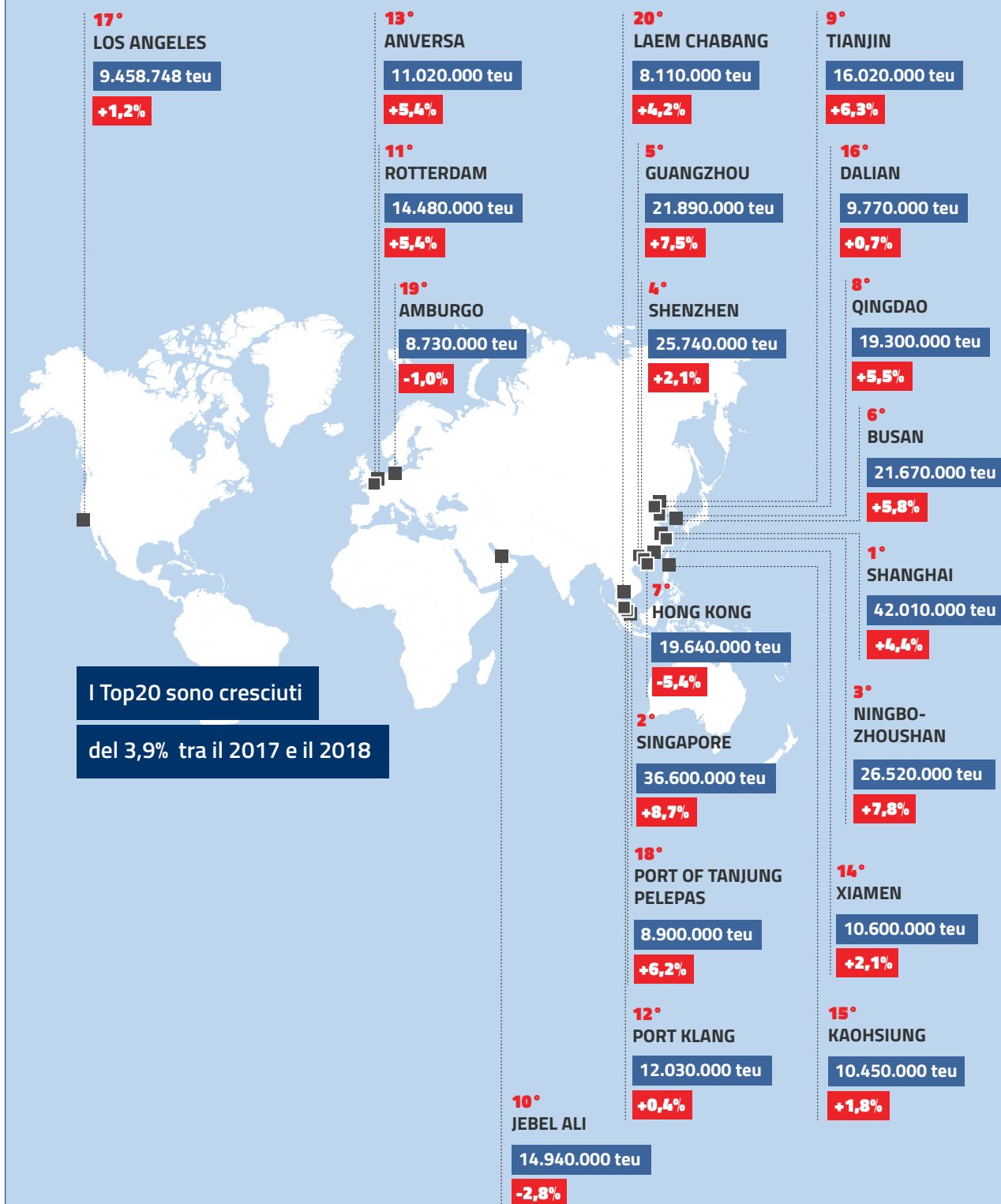
**l'anno dei record
per i grandi porti
e per Suez**

**348 milioni di teu
movimentati
dai Top20 del mondo:
+12% negli ultimi 5 anni**

**L'Asia
leader nel settore
del trasporto container**

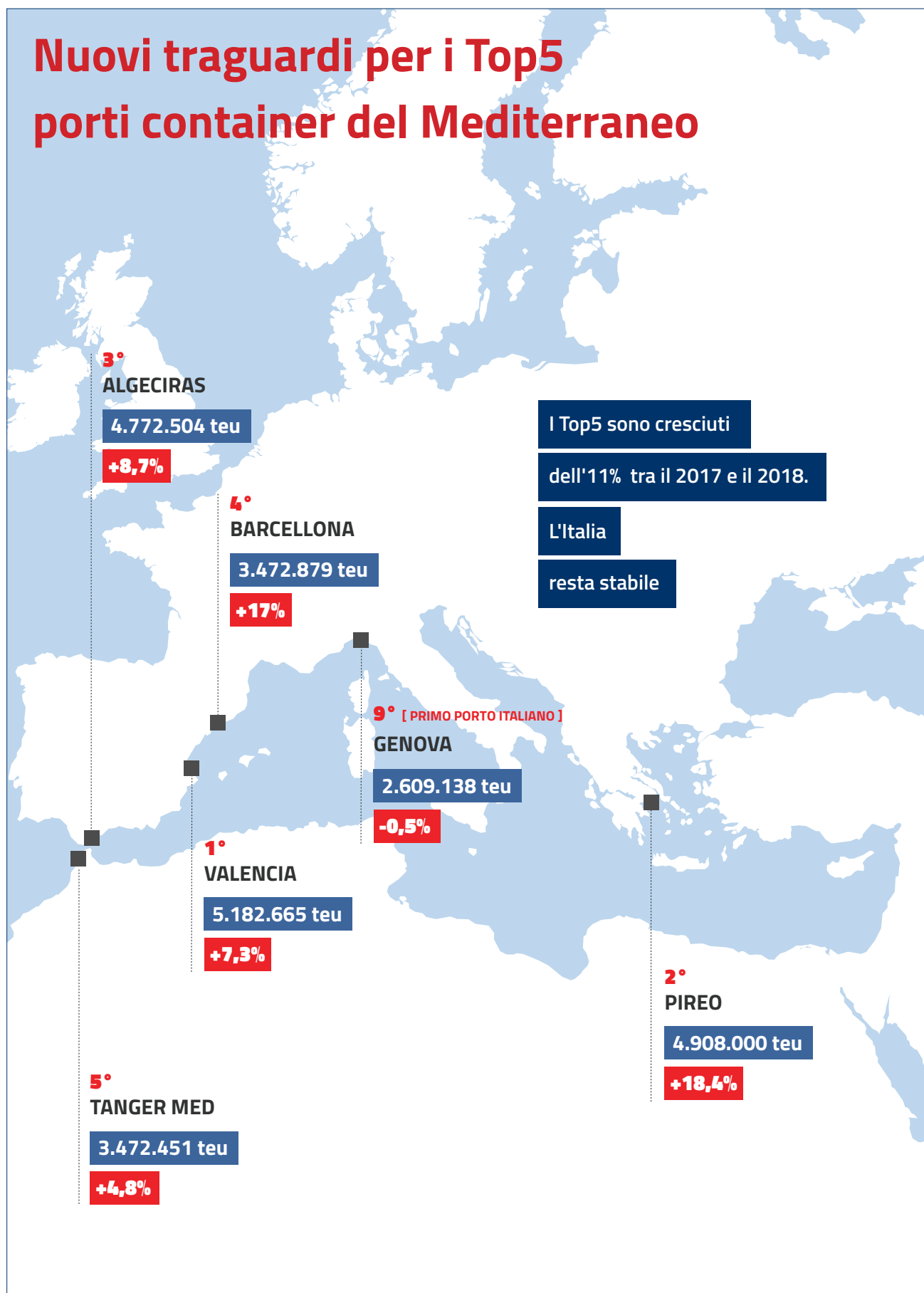
**I 150 anni del Canale di Suez:
si conferma la grande via di transito
del trasporto marittimo**

I principali porti container mondiali continuano a crescere



Fonte: SRM su fonti varie

Nuovi traguardi per i Top5 porti container del Mediterraneo



Fonte: SRM su fonti varie

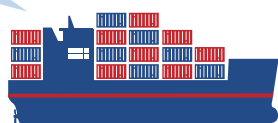
Le recenti performance del Canale di Suez...

Nel 2018 doppio record:

oltre 18 mila navi e 983 milioni di merci transitate

491 mln tonn
+4,2%

5.706



containership +2,5%

A seguito dell'allargamento

la dimensione media delle navi è

cresciuta del 12% tra il 2014 e il 2018

Mar Mediterraneo

Golfo di Suez

4.724



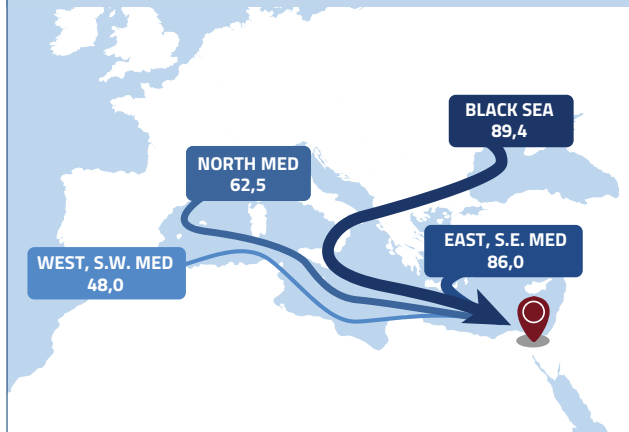
oil tanker +4,1%



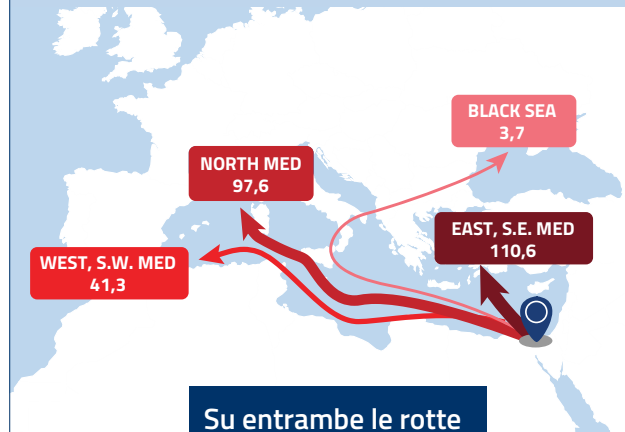
235,5 mln tonn
+7%

...e il ruolo dei porti Med

524,6 mln tonn TOT. SOUTHBOUND



458,8 mln tonn TOT. NORTHBOUND



Su entrambe le rotte

coprono il 55% del totale

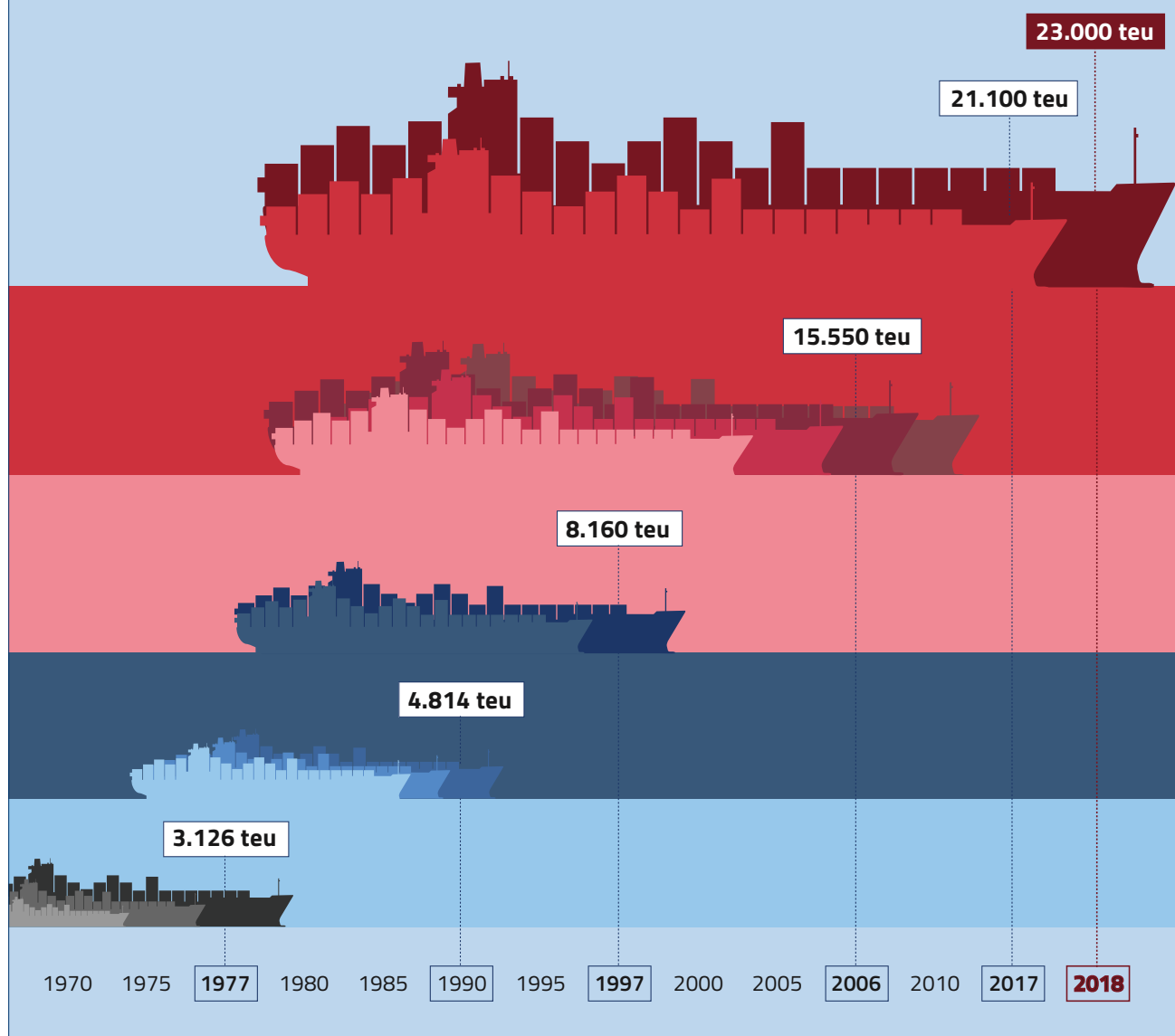
Fonte: SRM su Suez Canal Authority

I grandi fenomeni marittimi

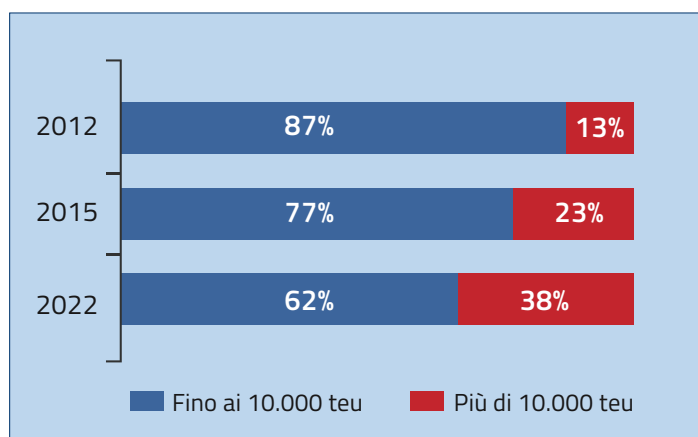
I porti Med:
ponte per la manifattura
cinese e per la distribuzione
dei grandi player
del Middle East

Con le Special Economic Zone
si rafforzano le strategie
degli investimenti esteri

Continua la rincorsa al gigantismo



Flotta container



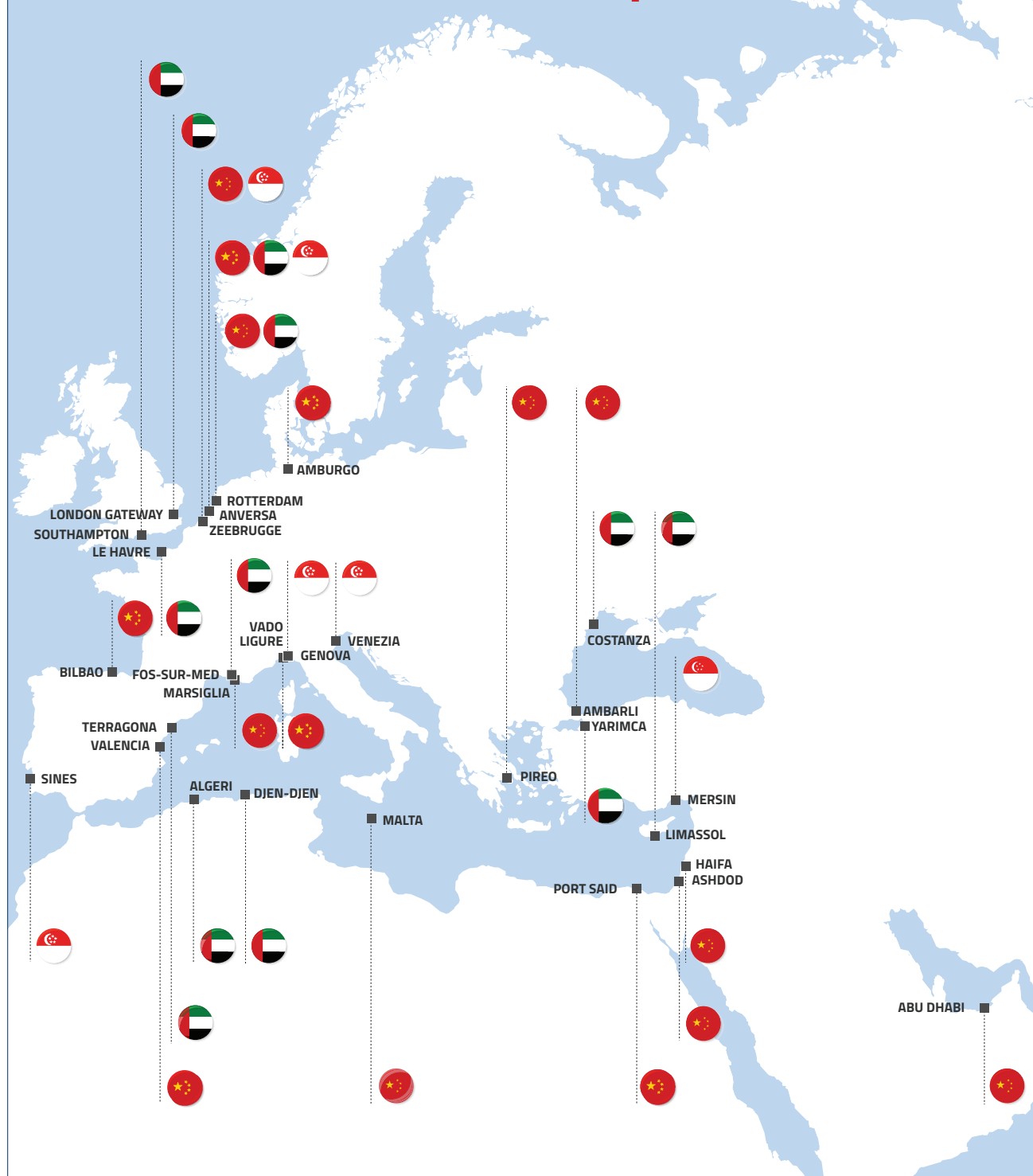
133 nuove navi da 10-23.000 teu

verranno lanciate nel 2022,

45 delle quali nella fascia 18-23.000 teu

Fonte: SRM su Alphaliner e OCSE

Aumenta l'attrattività dei porti Med



INVESTIMENTI:



Cina



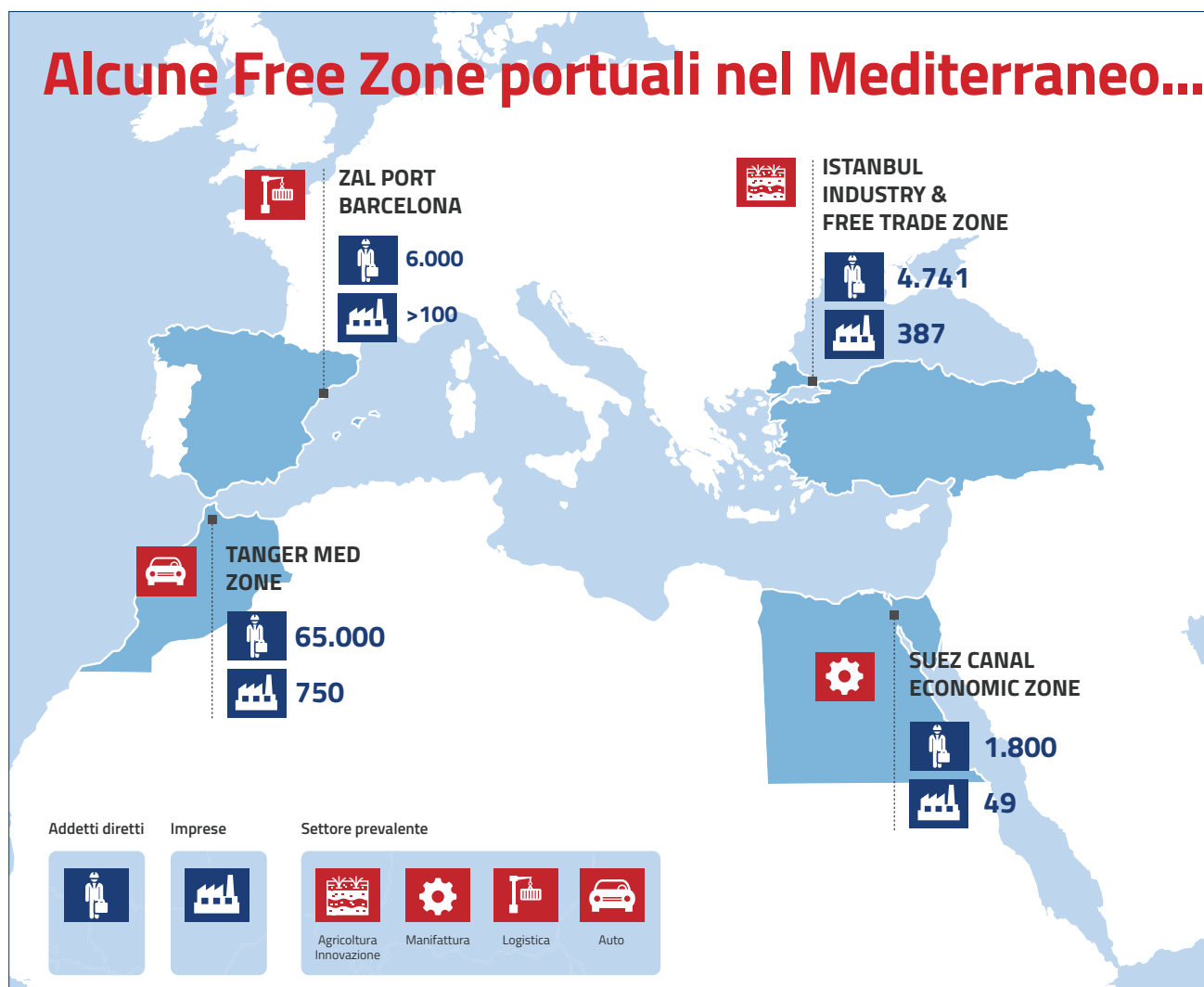
Emirati Arabi Uniti



Singapore

Fonte: SRM su fonti varie

Alcune Free Zone portuali nel Mediterraneo...



...e lo stato di avanzamento delle ZES in Italia



Fonte: SRM su fonti varie

Il ritratto marittimo dell'Italia

**I porti italiani
gestiscono
quasi 500 milioni
di tonnellate
di merci l'anno**



184 mln tonn
rinfuse liquide



69 mln tonn
rinfuse solide



106 mln tonn
Ro-Ro

**Il mare veicola
oltre un terzo
dell'export italiano**

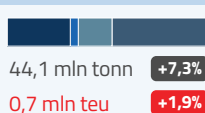
**L'export via mare dell'Italia
nel 2018 ha superato
i 120 miliardi di euro (+4%)**

Le performance delle Autorità di Sistema Portuale italiane

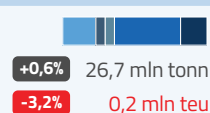
MAR LIGURE ORIENTALE



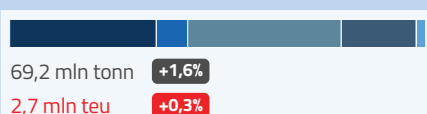
MAR TIRRENO SETTENTRIONALE



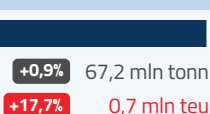
MARE ADRIATICO CENTRO-SETTENTRIONALE



MAR LIGURE OCCIDENTALE



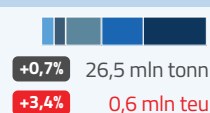
MARE ADRIATICO ORIENTALE



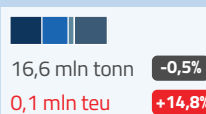
MAR DI SARDEGNA



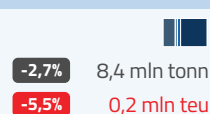
MARE ADRIATICO SETTENTRIONALE



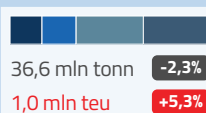
MAR TIRRENO CENTRO-SETTENTRIONALE



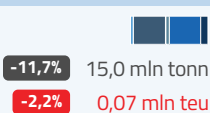
MARE ADRIATICO CENTRALE



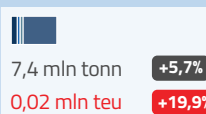
MAR TIRRENO CENTRALE *



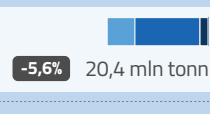
MARE ADRIATICO MERIDIONALE



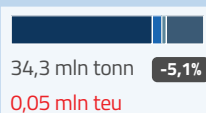
MARE DI SICILIA OCCIDENTALE



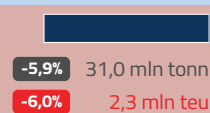
MAR JONIO



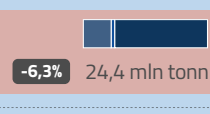
MARE DI SICILIA ORIENTALE **



PORTO DI GIOIA TAURO ***



PORTI DI MESSINA-MILAZZO



* Il dato delle rinfuse solide del porto di Napoli è stimato.

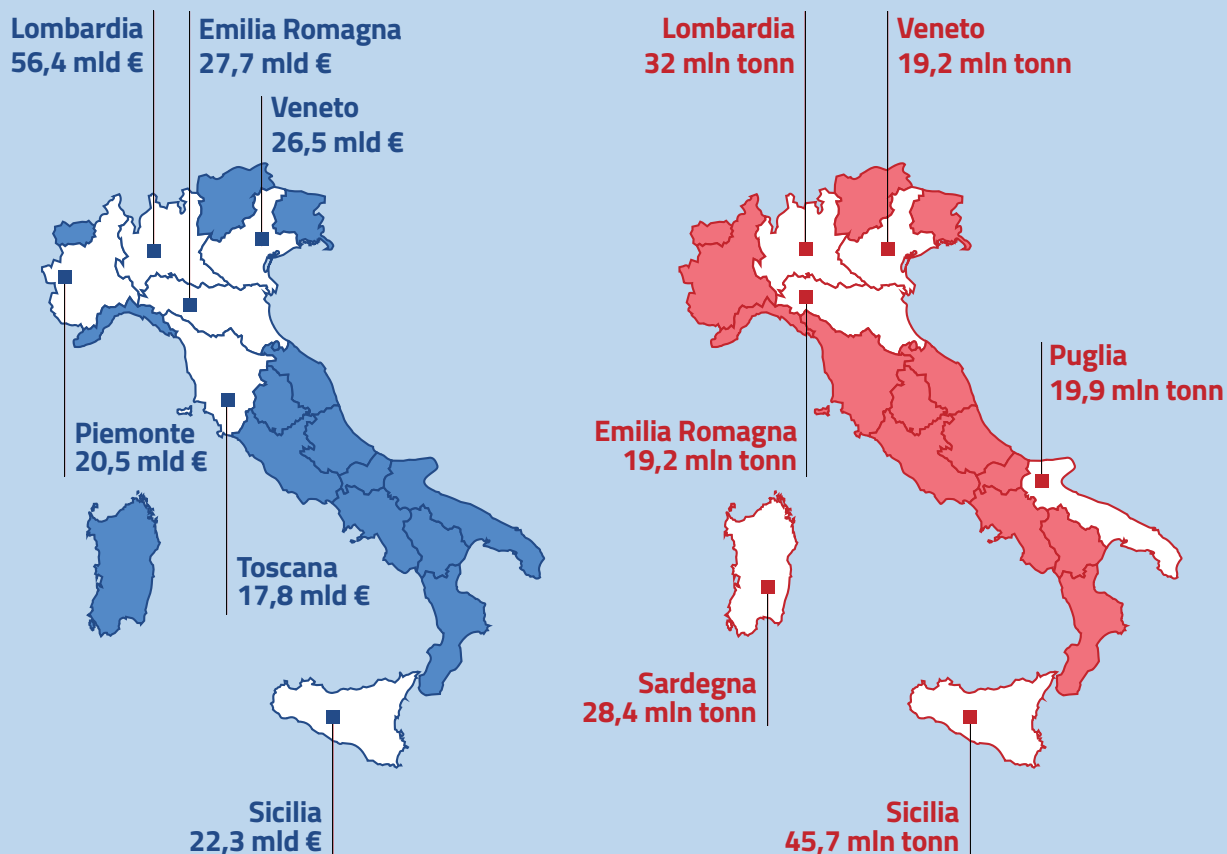
** Per il porto di Catania il dato 2018 non è disponibile.
Pertanto è stato considerato il 2017.

*** Stima merci per Gioia Tauro sulla base dei TEU movimentati.

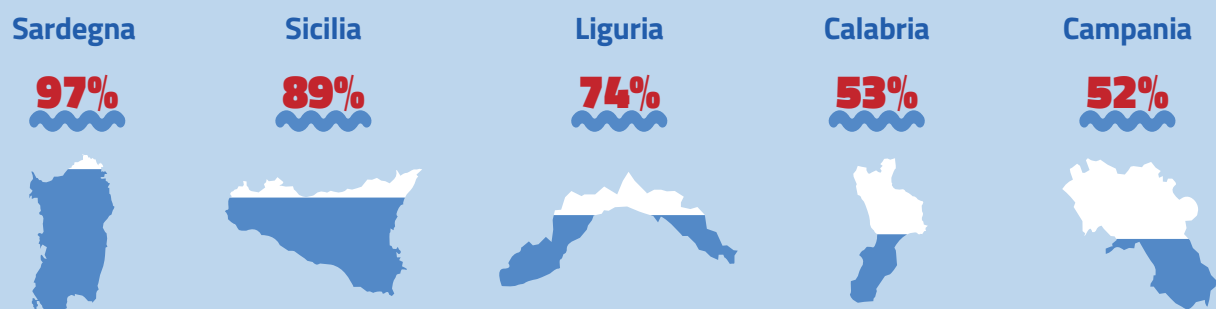
■ Rinfuse liquide (mln tonn) ■ Rinfuse solide (mln tonn)
■ Container (mln tonn) ■ Ro-Ro (mln tonn) ■ Altre merci (mln tonn)

■ tot merci Var. 2018-2017
■ tot teu Var. 2018-2017

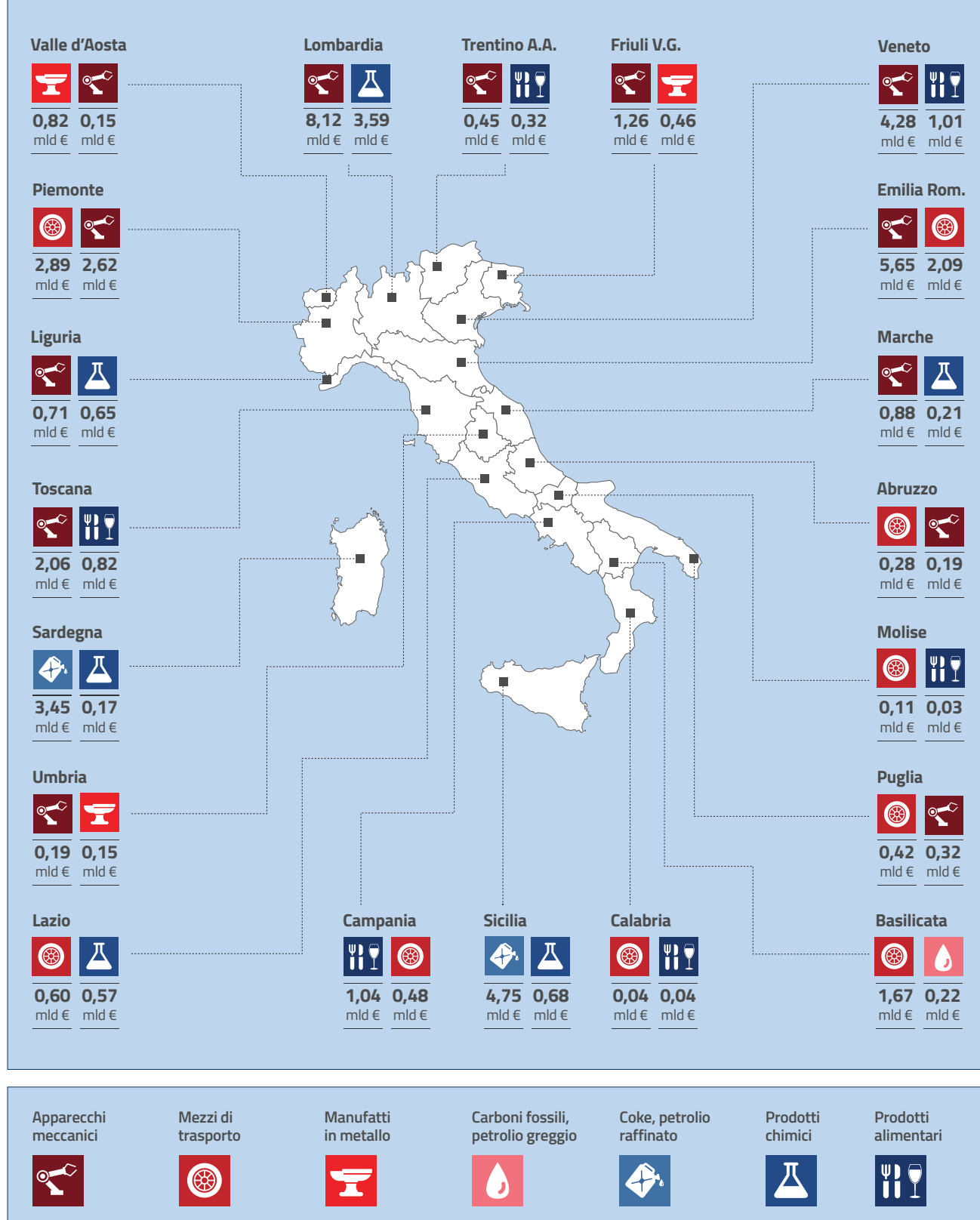
Le regioni italiane con maggiore import-export marittimo



Quanto vale il "mare" per l'import-export delle regioni?

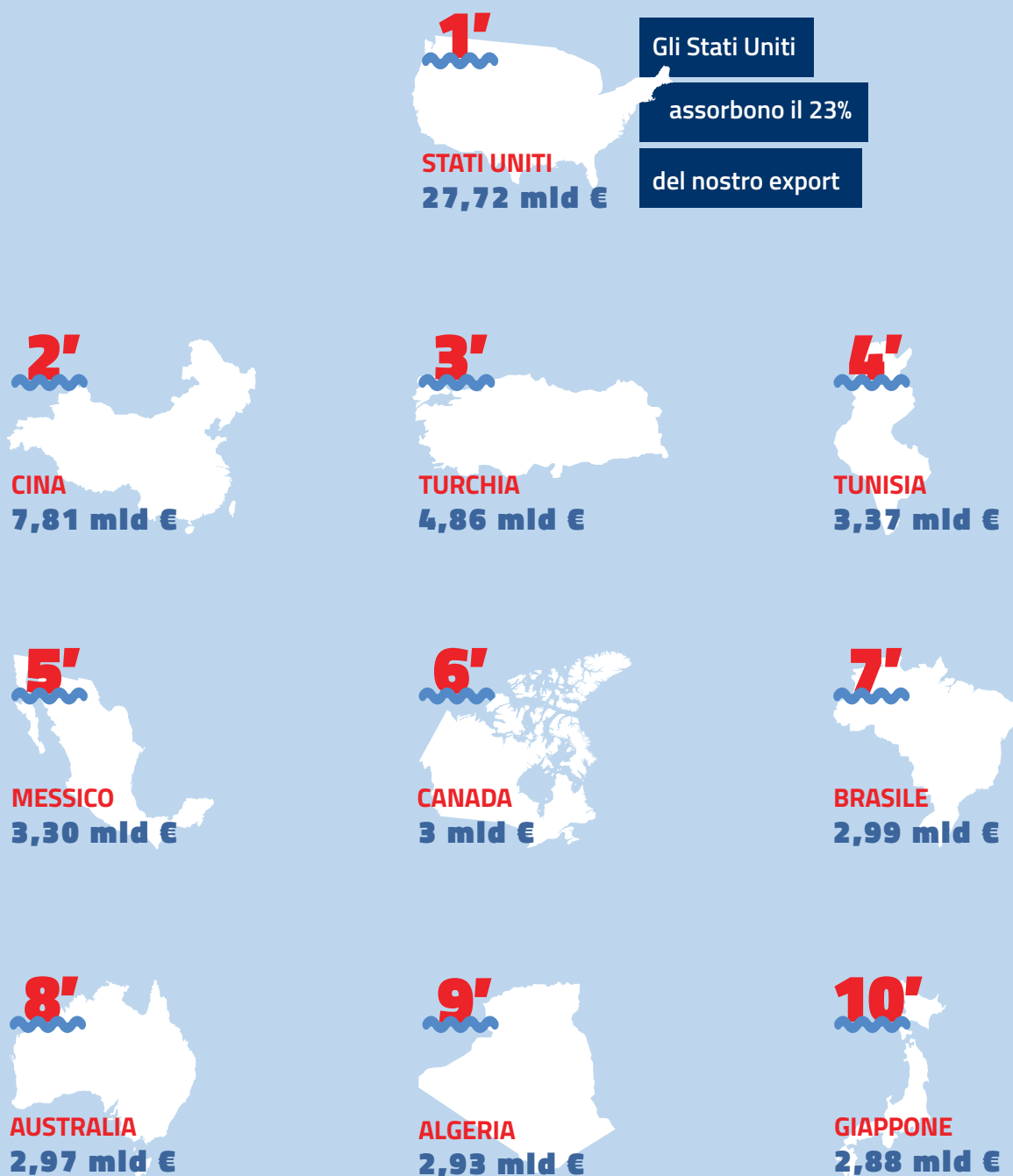


Quali sono le merci più esportate via mare dalle regioni italiane?



Fonte: SRM su Istat-Coeweb (dati relativi al periodo gennaio/settembre 2018)

Le prime 10 destinazioni dell'export italiano via mare



Intervista a Henk de Bruijn, Manager Social & Labour Affairs, Rotterdam Port Authority



Do you believe that over the last years the role of the Port Authority has improved ? Does this connect with general perception of the port on behalf of the people living around the port?

The role of Port Authorities in the world is influenced by local and international trends and developments, which makes it a challenge to compare.

However in the annual report over 2017 the PA (published in 2018) has an extensive performance dashboard in place.

The sustainability report is completely integrated in the annual report.

The materiality index explains quite substantially how the interests of stakeholders meet with the value drivers of the port of Rotterdam.

Also there is a comprehensive set of performance indicators which makes the environmental and social performance as transparent as possible.

Whether this connects with the perception of the people living around the port is difficult to say. What we can say is that the PA is taking a pro-active role when it comes to jobs, employment and employability, so this contributes directly to the quality of lives of our port citizens. The port is and remains the job engine of the region, which was recently underscored by the report 'The Rotterdam Effect', a research conducted by the Erasmus University.

Important tools are also FutureLand, Maasvlakte2 and Education and Information Center at the Landtong.

In FutureLand (www.futureland.nl) you can experience the developments in Rotterdam's newest port area from close quarters.

Maasvlakte2 (www.portofrotterdam.com) doesn't only show you the world's most modern container terminals and largest sea-going vessels, you can also view the latest offshore innovations. Curious about other Rotterdam port developments? Be amazed

by the role of digitisation or promising forms of new energy. EIC Mainport Rotterdam (www.eic-mainport.nl) is an initiative of the Port of Rotterdam and Deltalinqs (representing the port and industrial companies in Rotterdam in important issues of common interest). The main objective is to inform young people about the port and industrial area of Rotterdam. Yearly about 20.000 pupils and students visit the port.

Another important tool is our 'Havenkrant'. The Havenkrant – the main newspaper of the Port of Rotterdam – brings the port 'closer' to local residents.

The Havenkrant is a twelve-page tabloid newspaper which the Port of Rotterdam Authorities has been delivering free of charge to all the residents living in the vicinity of the Port of Rotterdam since 2009. The circulation is 530,000 and it appears four times a year. It is also available free in central places in the city. The newspaper's aim is to bring the port, which has literally moved increasingly further away, closer to local residents. The articles are low threshold and present the port in all its aspects. From work to recreation, from security to accessibility. To make it more hands-on: this week we have signed a Learning & Jobs agreement

which is signed by the Municipality, the Port Authority, vocational education institutes and the industry, represented by Deltalinqs.

In this time of transitional change, there is quite an anxiety among the people whether there will be sufficient jobs because of the digitization, robotization and energy transition. This program covers actions relating to three labour market challenges: from school to work, from work to work and return to work. Companies are going to invest in 1000 so-called career-start guarantees, and millions of euros are invested in job mobility (from work to work) and education programmes.

Do you think that the Port Authority is doing its best

to inform people about and integrate the role of the port for the city?

The PA is using all means of communication to not only inform, but also engage people about the role of the port for the city. Obviously there are the formal communication channels with the municipality and stakeholders in the society, but ordinary people will not see how intensive these contacts are. The formal integration of this role is made explicit in the CSR statement. Within the department of Environmental Management, there is a programme manager for CSR activities.

The CEO is also part of the CSR core team, who are looking after the CSR awareness within the organization.

What the general public notices from the pro-active role towards the general public is obviously at big events such as the World Port Days, visited by approx. 350,000 per year. Besides this the PA sponsors many other festivals. Additionally the PA is an active contributor to education programmes, both in terms of guest lectures, company visits and even as co-developers of new programmes.

In addition to that there are open communication channels, newsletters, Instagram and twitter accounts. For the longer term, the port and city are actively and collaboratively going through continuous development cycles

with regards to the port vision. This also includes many consultative sessions with and in stakeholder communities.

The results of our yearly 'Port reputation survey' are:

Port reputation survey

DUTCH PUBLIC

FAMILIAR

with port of Rotterdam
61%
of the public

PROUD

of port of Rotterdam
93%
of the public

REPUTATION

of port of Rotterdam
85,7

LICENCE TO GROW

of port of Rotterdam
80,1

LOCAL RESIDENTS

FAMILIAR

with port of Rotterdam
98%
of the local residents

PROUD

of port of Rotterdam
93%
of the local residents

REPUTATION

of port of Rotterdam
87,4

LICENCE TO GROW

of port of Rotterdam
79,9

Would you consider the Rotterdam model as the best for

societal integration? And for business? Is there a limit between

the business role and that of a public authority?

We believe it is not possible to say that there is a best for everything. Whether the Rotterdam model exists seems to be the perception of other port authorities or scientists. Our port model is built upon the landlord model. This means we want to be the best for our clients, users and stakeholders, and to lead by example.

More and more we are under the impression that 'doing the things right' is not what matters most.

What matters is that we have to believe in is 'doing the right things right'.

If you're really committed to contributing to sustainable goals and societal integration, we have to go beyond economic growth and let this go

hand in hand with improving the living environment. This means we attract and do business in a socially responsible way with

respect for people and environmental issues. By doing so, we are reconciling the business role and that of the public authority.

Do you believe that all PAs would benefit from this type of model or do you think that there is a difference according to location and market?

The landlord model is being applied in other ports around the world. The scientific discourse tells us that port management models vary a lot, depending on the institutional governance, the coordination mechanisms at play to work out conflicts of interests. We are learning a lot ourselves in the ports where we are actively involved, such as in Sohar.

Considering the performance over the last 15 years, this is actually the best comparison where the 'Rotterdam model' as you are calling is actively implemented. We are learning a lot from the way we have understood our own port model, but now in a different location, different market and different stage of development. So yes, we believe there is a significant difference.

maritime
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