



# Intermodal connections and the Port system: strategies for the development of the EUSALP area in the perspective of 2030 trend

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Trieste, 26<sup>th</sup> September 2019

# A new observatory: a permanent analysis on ports and shipping

## News

**SRM partner of the 2018 Dialogue of Continents Forum | Paris 3-5 September**

SRM is partner of the 2018 Dialogue of Continents Forum. The event is organised by the Reinventing Bretton Woods

**Geo-strategic scenarios of Italian ports in the Mediterranean | Assoport | Rome, 19 July**

On Thursday 19th July the Association of the Italian Ports presented a study on Geo-strategic scenarios of Italian ports in the Mediterranean

**Italian Excellence: The Ro-Ro sector | Article in "Porti campani in RETE" magazine**

Italian Excellence: The Ro-Ro sector. This is the title of the analysis written by Alessandro Panaro, Head of "Maritime & Mediterranean Economy"

**Network and Infrastructure | Confartigiano Conference | Bari, 13th July**

On 13th July SRM will be speaker at one of the conference organized by Confartigianato in anticipation of the 2018 Mezzogiorno Convention

**Italian Maritime Economy. China, energy corridors, ports and new routes: geomaps of a changing Mediterranean**

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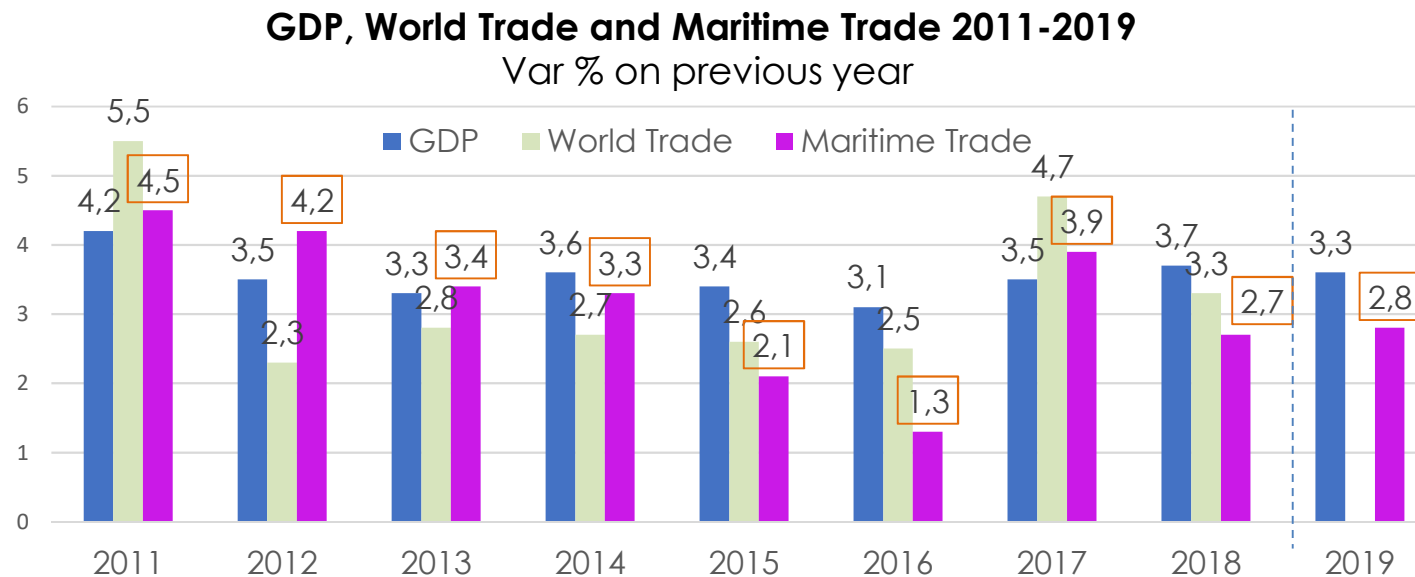
# Agenda

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-  **The relevance of seaborne trade**
-  **Maritime traffic and infrastructures**
-  **Intermodality: a key of success**
-  **The biggest future trends of Maritime traffic**

## The growth of the world seaborne trade

- Globalization: **GDP, merchandise trade** and **seaborne trade** are interlinked and **have grown rapidly**.
- In 2018, seaborne trade grew by 2.7% (GDP 3.3%). In 2019 it will grow by 2.8%.



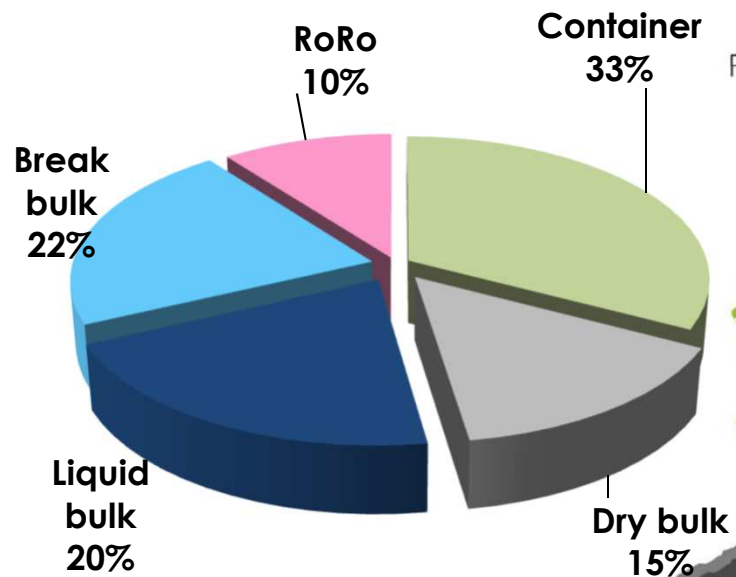
Source: Confitarma and IMF 2019

# The weight of the MED in the EUSALP area

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*MED seaborne trade:  
2 bn tonnes*

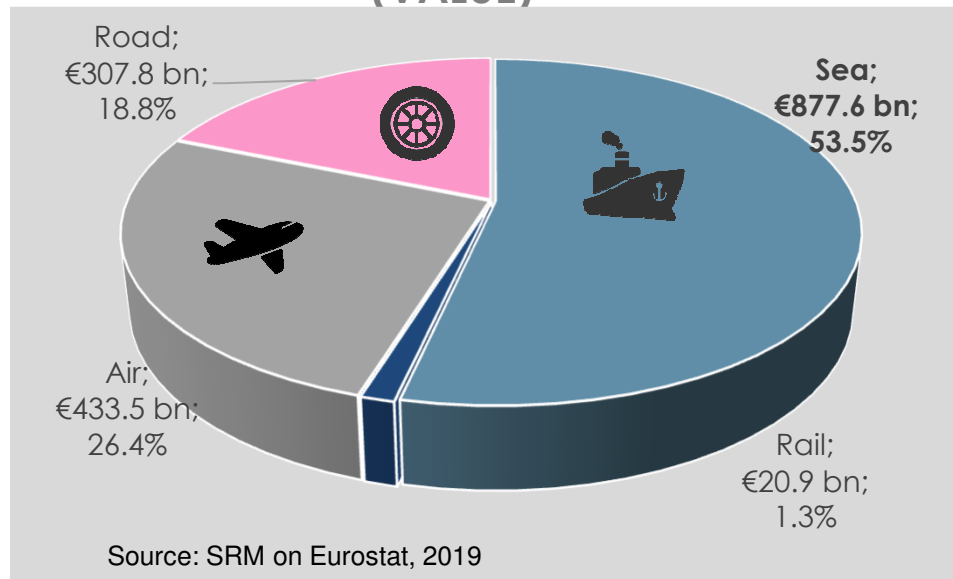
*The strategy concerns:  
7 Countries; 48 Regions*



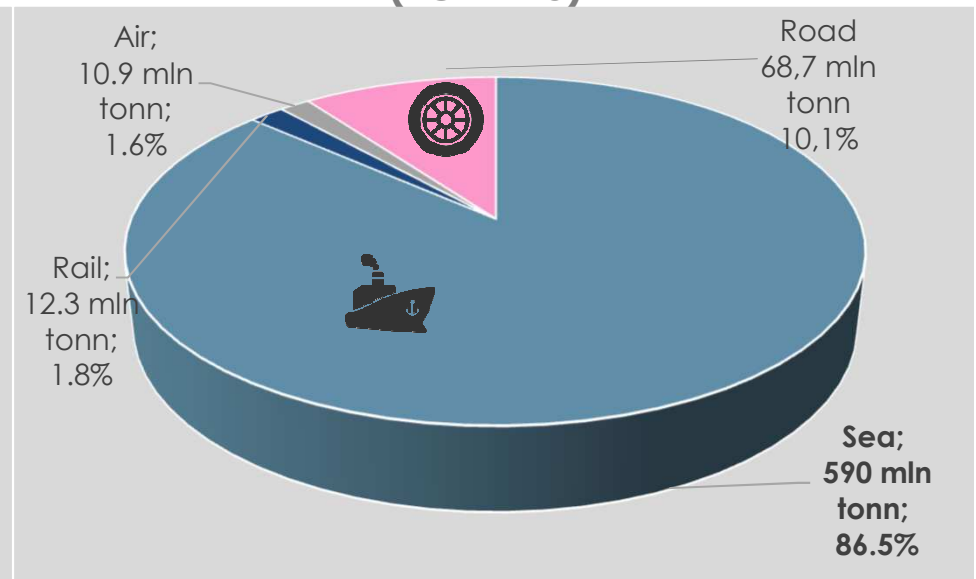
Source: SRM on OECD, 2019

## Area's trade with extra-EU by mode of transport

Import-Export Eusalp Countries  
by Mode of transport. 2018  
(VALUE)



Import-Export Eusalp Countries  
by Mode of transport. 2018  
(TONNES)

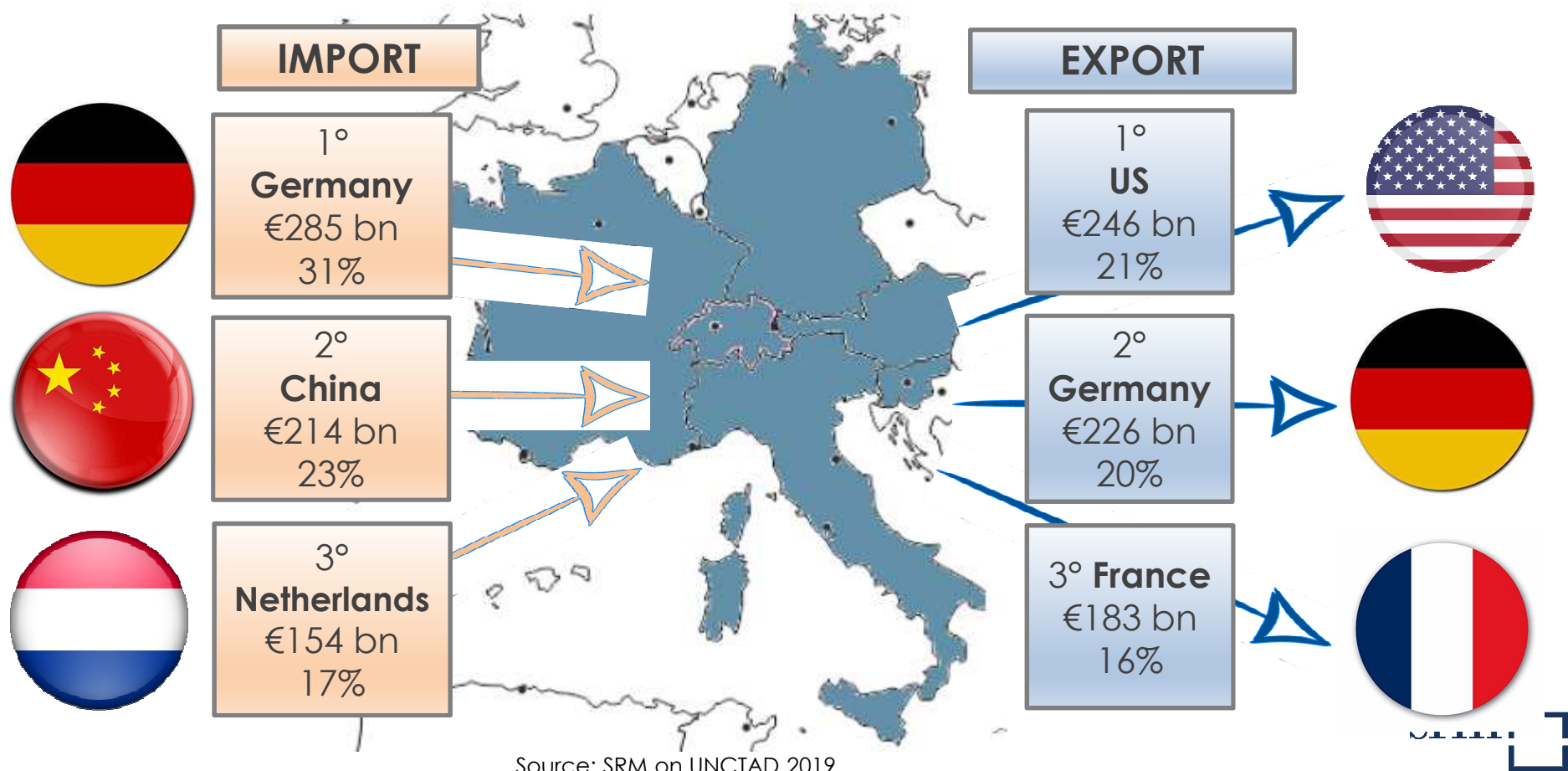


- In 2018, EUSALP Countries maritime trade with extra EU reached **almost €900 bn** equal to **more than half** of the total.
- EUSALP Countries volume of maritime traffic amounted to almost **600 million tonnes** equal to **87% of the total**.



# Area's trade partner

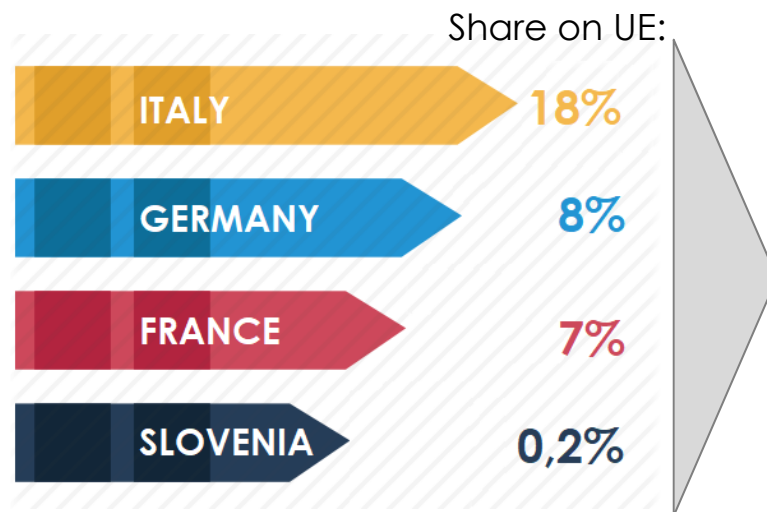
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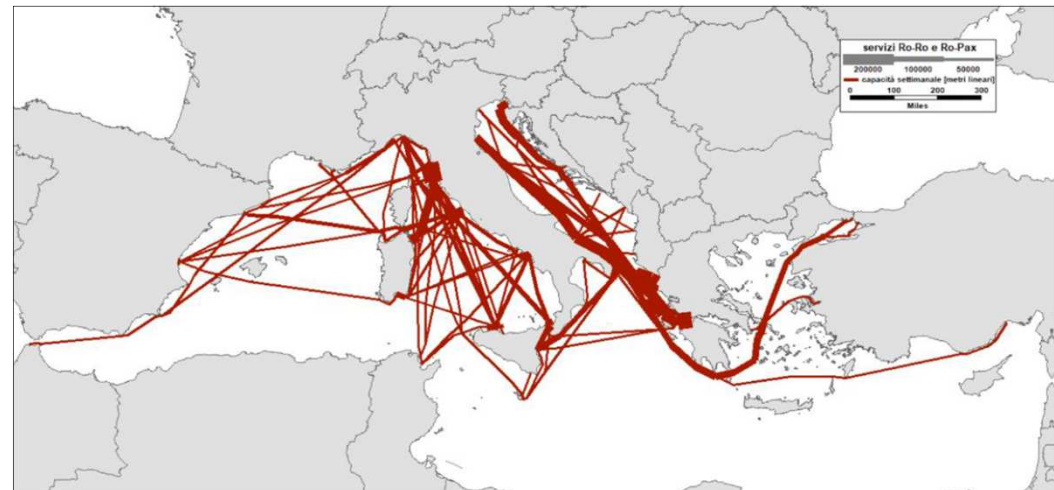
## A strategic sector: Ro-Ro traffic in Europe

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**478 mln tonnes of goods (+1.4%)  
carried on Ro-Ro ships in Europe**



**Ro-Ro and Ro-pax services in Italy: weekly capacity**



- **109 mln tonnes of Ro-Ro cargo** handled in Italy in 2018
- 85% of services provided by Italian companies



86 mln on the Tyrrhenian (and Islands side)

23 mln on the Adriatic side

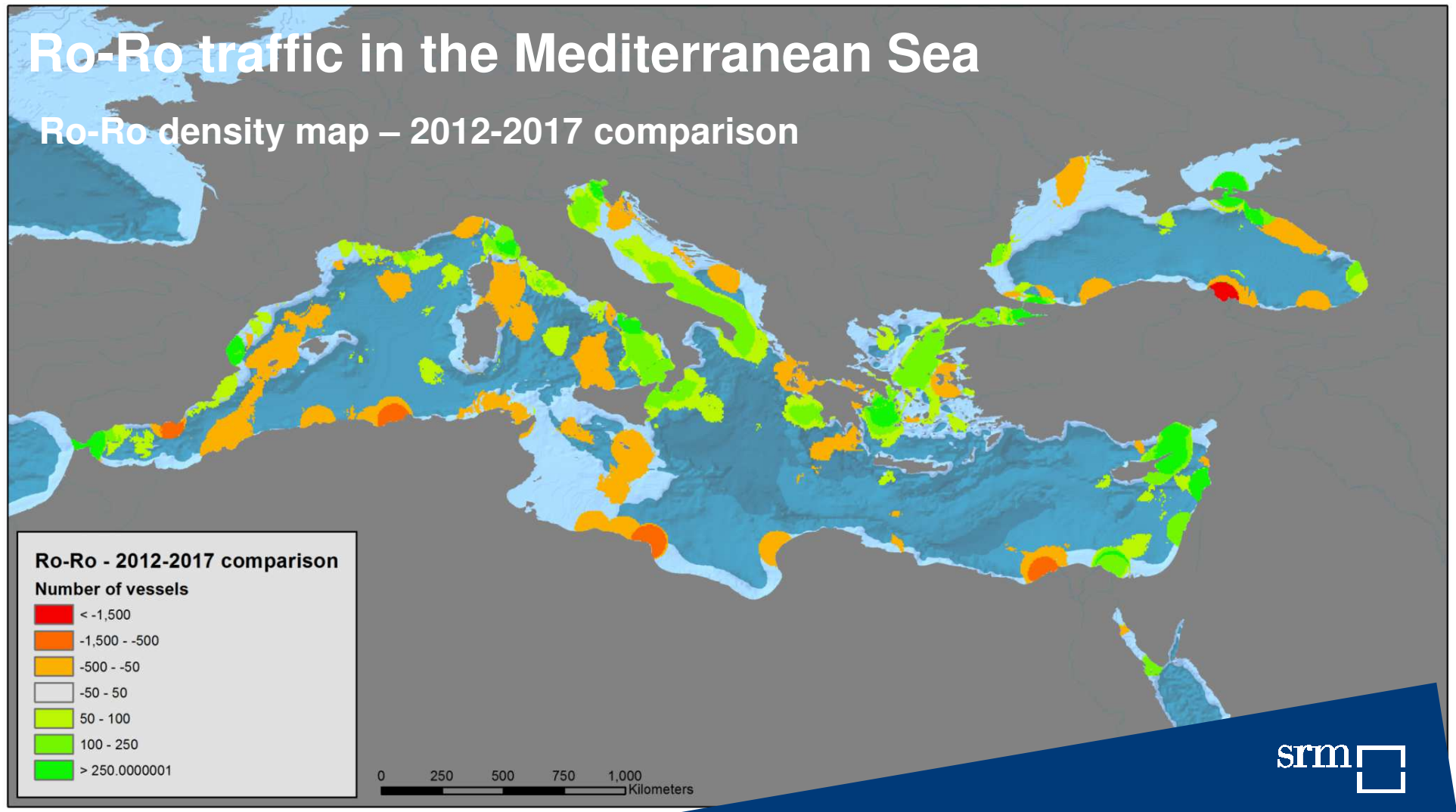


Source: SRM on Assoporti, Eurostat, RAM



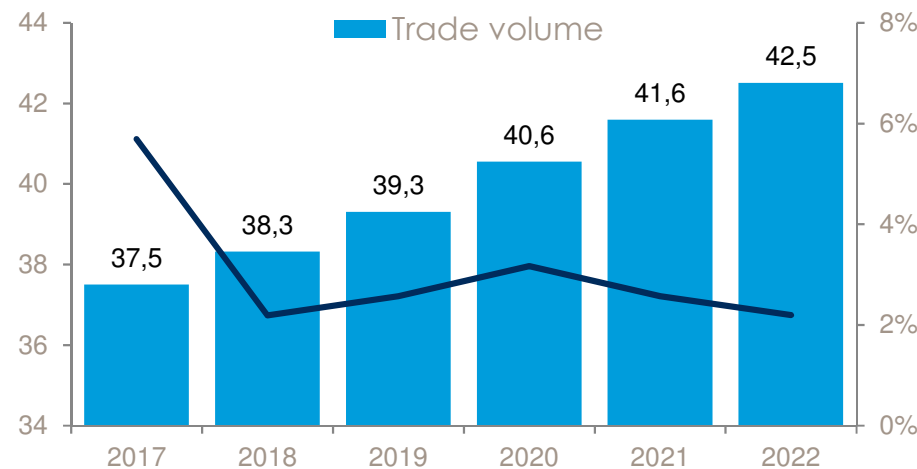
# Ro-Ro traffic in the Mediterranean Sea

Ro-Ro density map – 2012-2017 comparison



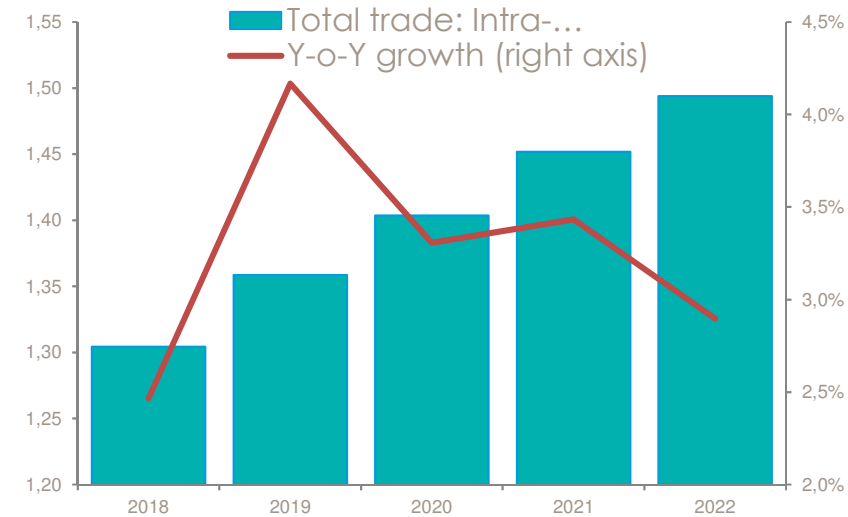
# Vehicles' Export is rising

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)



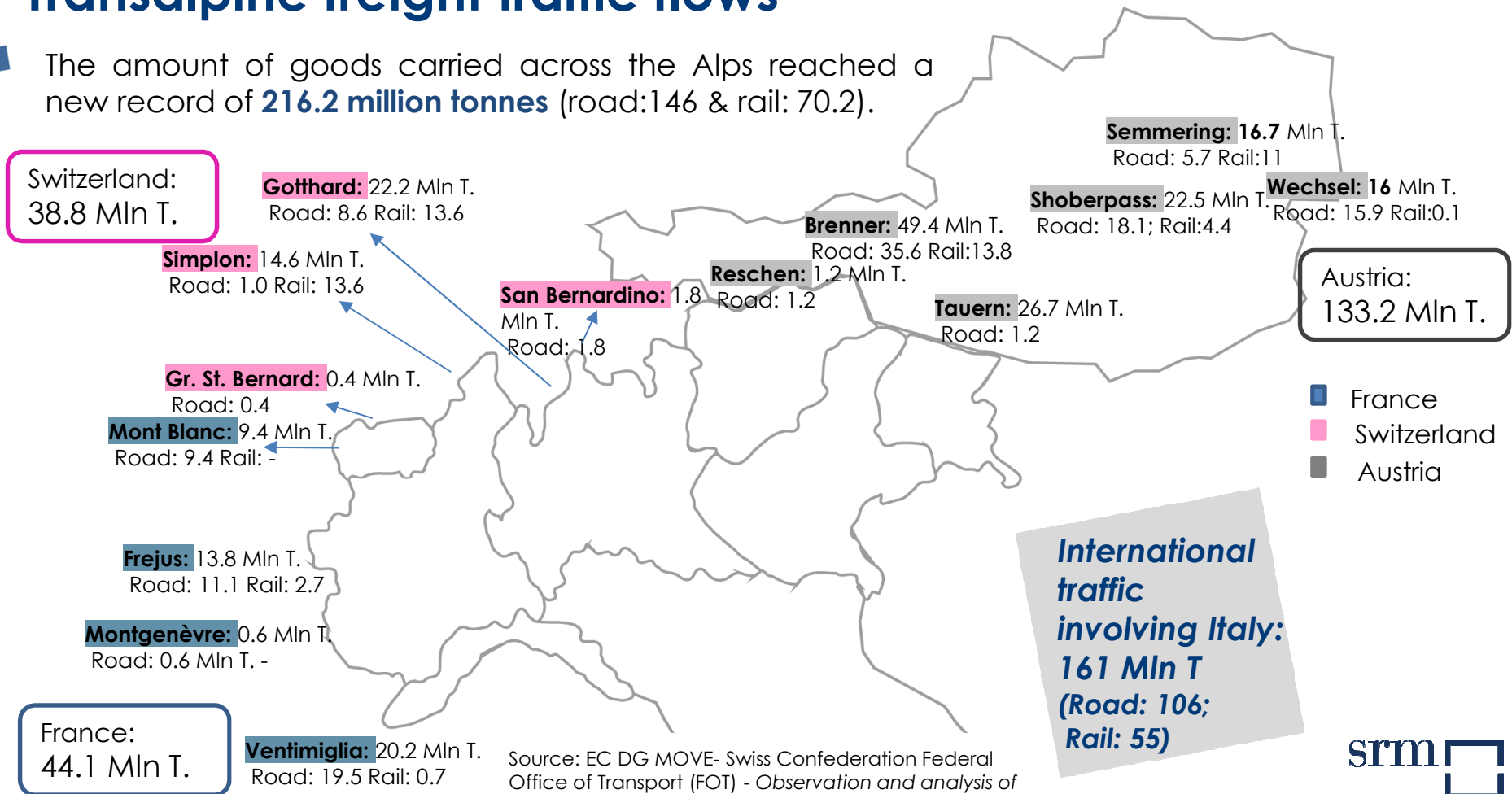
- To 2022 **Intra-med** trade shows a **growth (3.3%)**
- This data is very interesting for **the EUSALP Area**

Fonte: Drewry Maritime Research, 2018



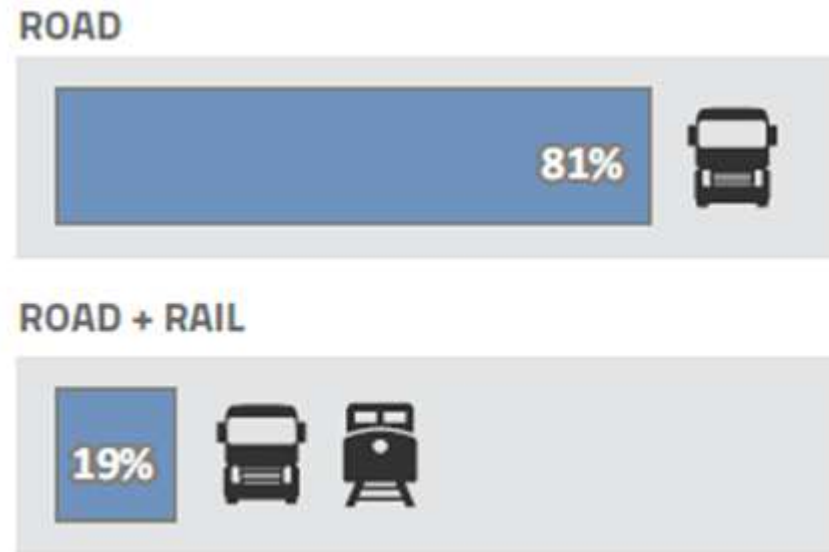
# Transalpine freight traffic flows

- The amount of goods carried across the Alps reached a new record of **216.2 million tonnes** (road:146 & rail: 70.2).



## From companies to ports: intermodality is still low

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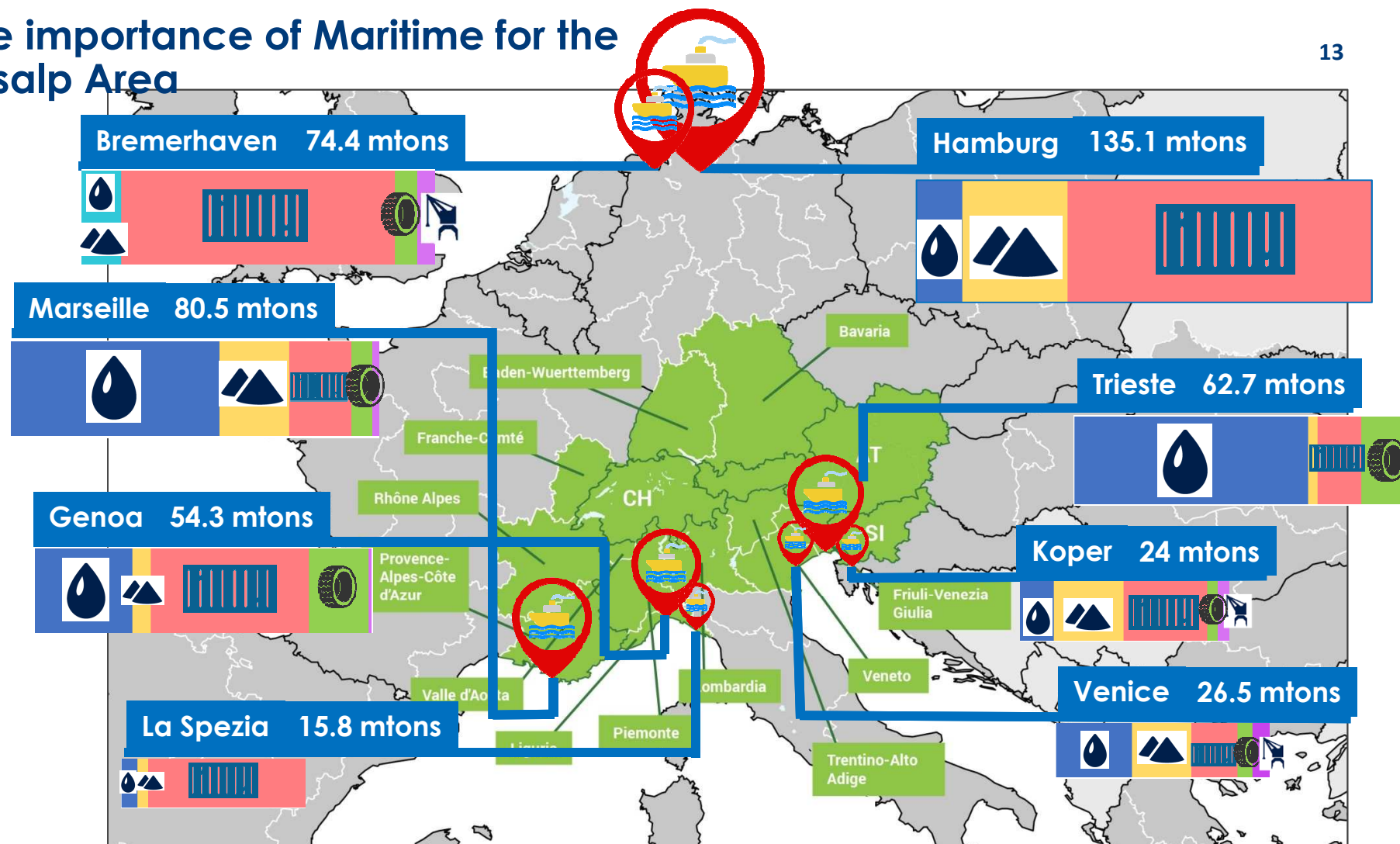


Source: SRM/Contship

- **81%** of companies use only road to transport goods from companies to the port and viceversa. Just 19% use also trains.

## The importance of Maritime for the Eusalp Area

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## The value of the port system



*The impact of the port system on the national economy in terms of value added:*

**€25.5 bn**

The impact on the economy of an increment of the capacity of port system:

**+ 3.2 billion Euros of value**

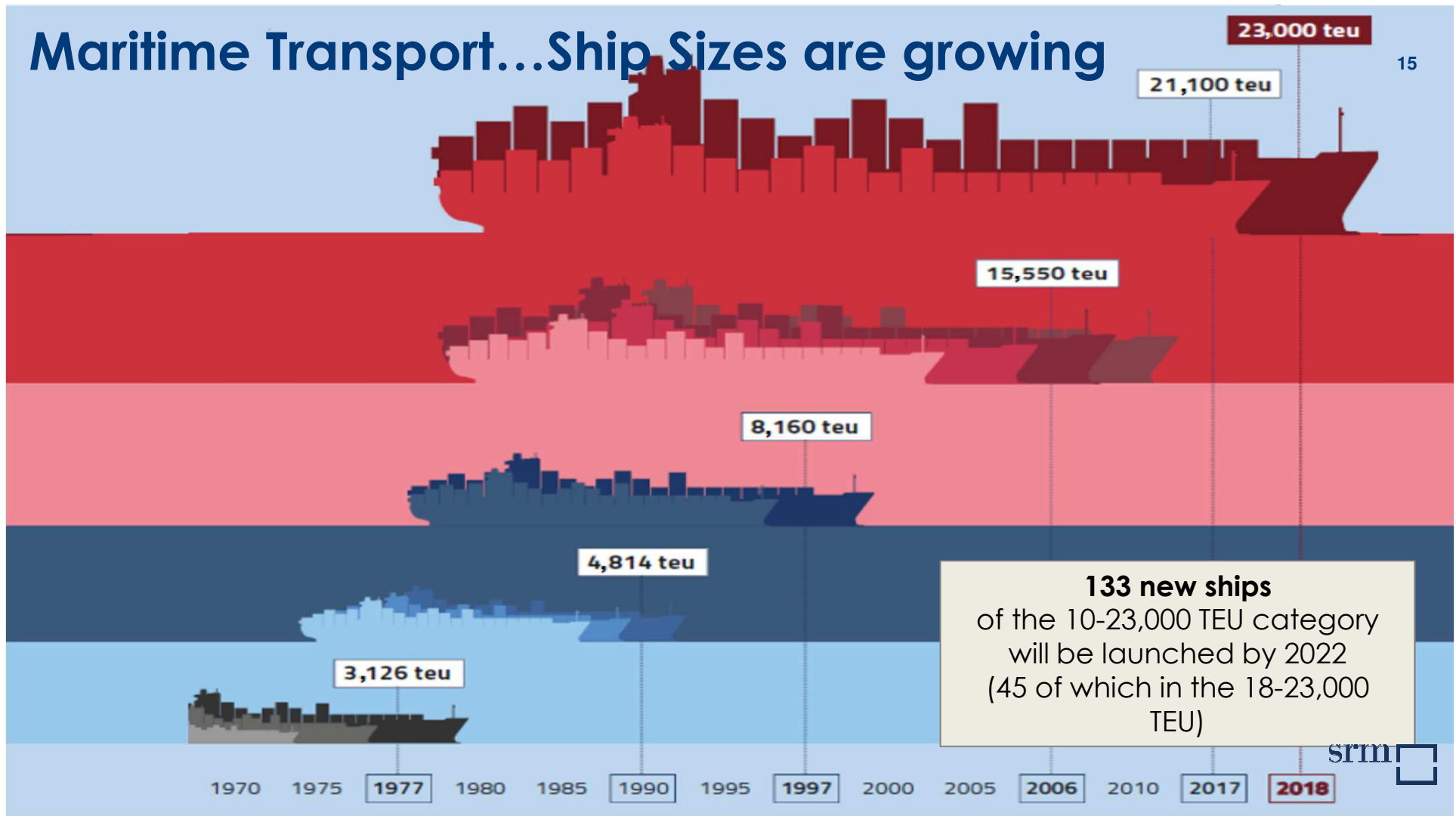
**added**



**+10% Investments  
in port system**

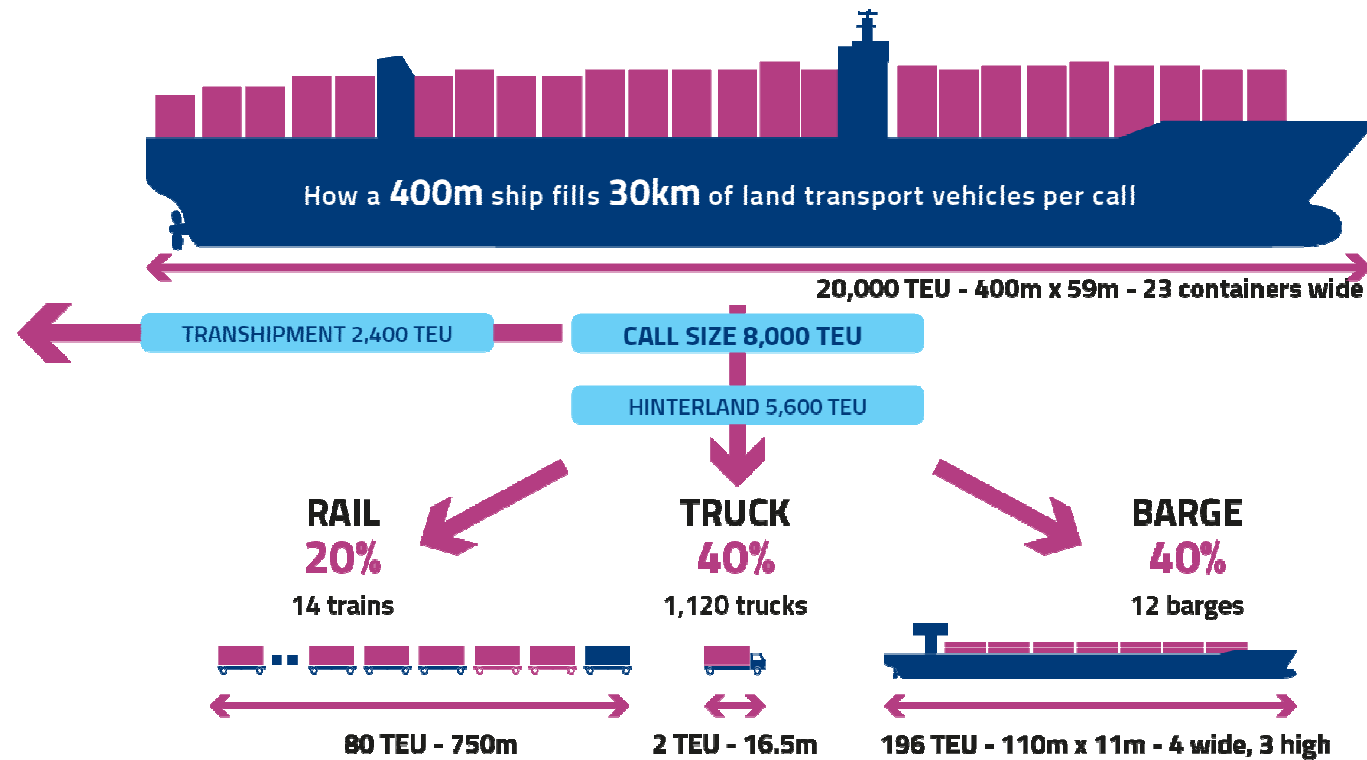


# Maritime Transport...Ship Sizes are growing



# The impact of a megaship on intermodal system

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Fonte: T. Notteboom



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- Dedicated department for the international development of the port
- Regular monitoring of routes and international trade



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- The Port XL model
- Support from port managers with specialised expertise and incentives





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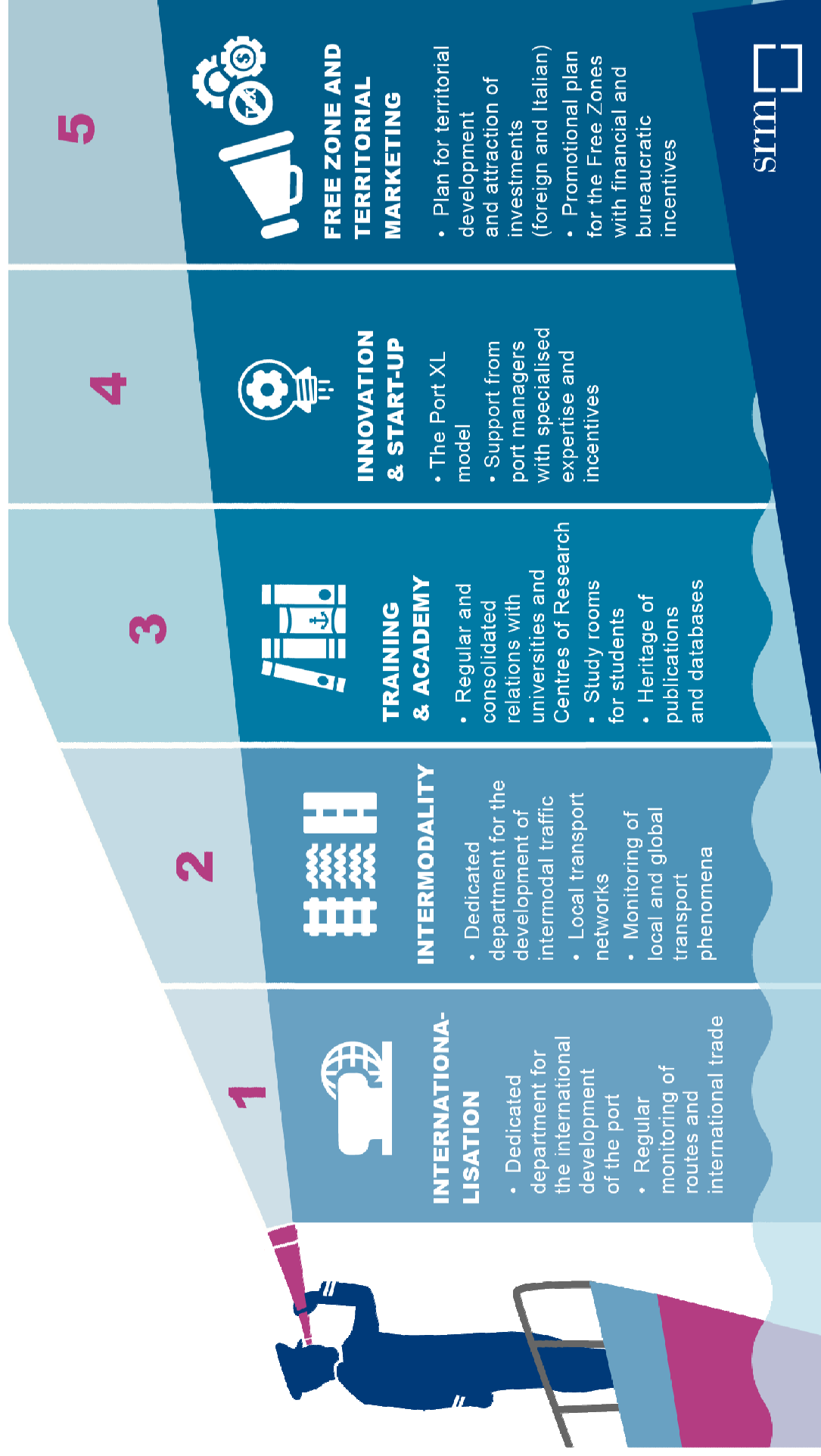
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## FREE ZONE AND TERRITORIAL MARKETING

- Plan for territorial development and attraction of investments (foreign and Italian)
- Promotional plan for the Free Zones with financial and bureaucratic incentives



## Conclusions

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-  The economic relevance of *Maritime* for the EUSALP Area
-  The integration of infrastructures
-  The growth of the port system
-  An intermodal vision

.... to achieve a better and more sustainable future