



FORUM

delle Camere di Commercio dell'Adriatico e dello Ionio
of the Chambers of Commerce of the Adriatic and Ionian Area



STUDI PER LA GESTIONE
DELL'ECONOMIA
E DELLE AZIENDE

ADRIATIC AND IONIAN PORTS: Maritime traffic in 2010 SSS: new traffics and financial measures to start services

Ida Simonella

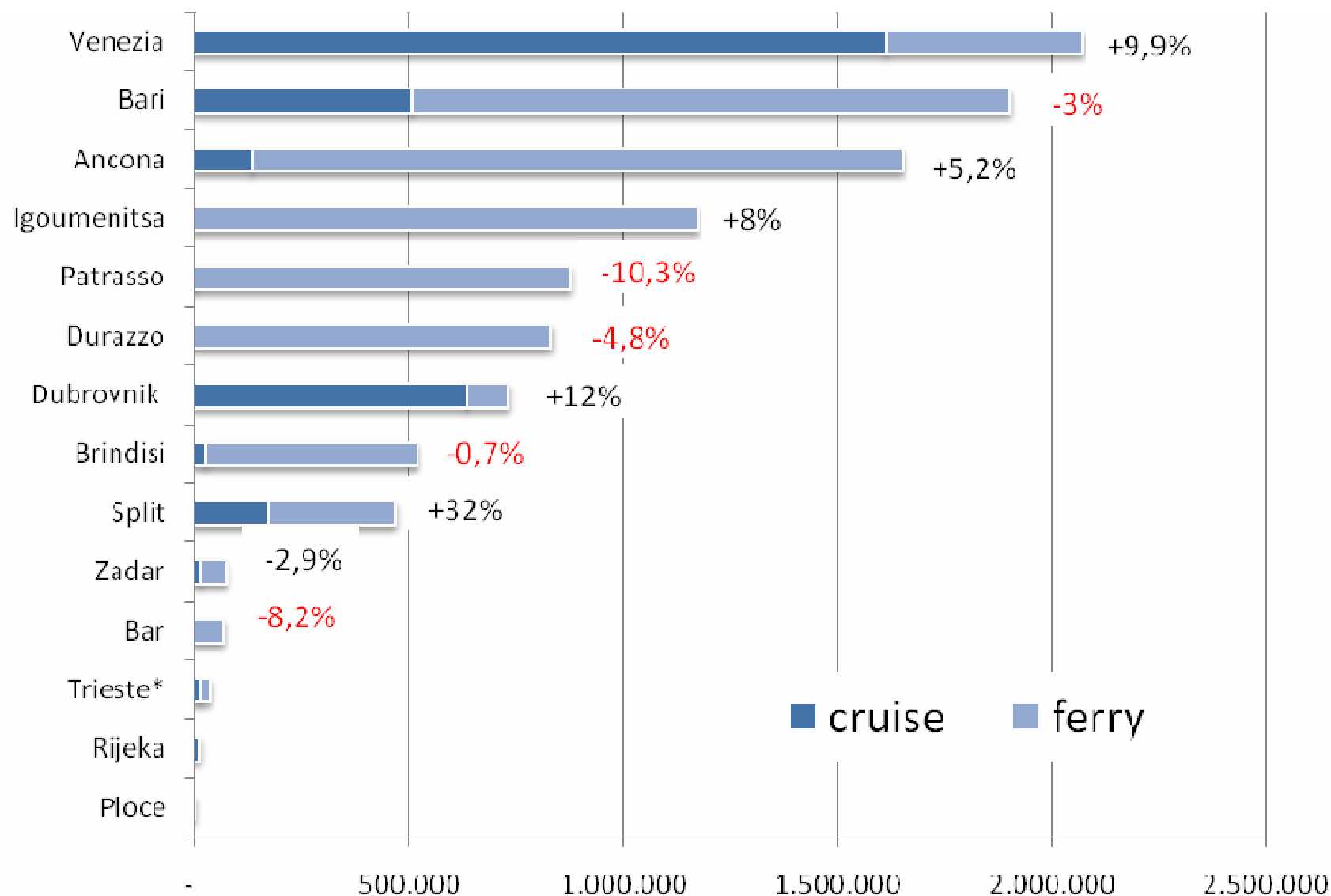
Budva Becici, 12th May 2011

● **TRAFFIC AND TRENDS**

● SSS AND EAST MED

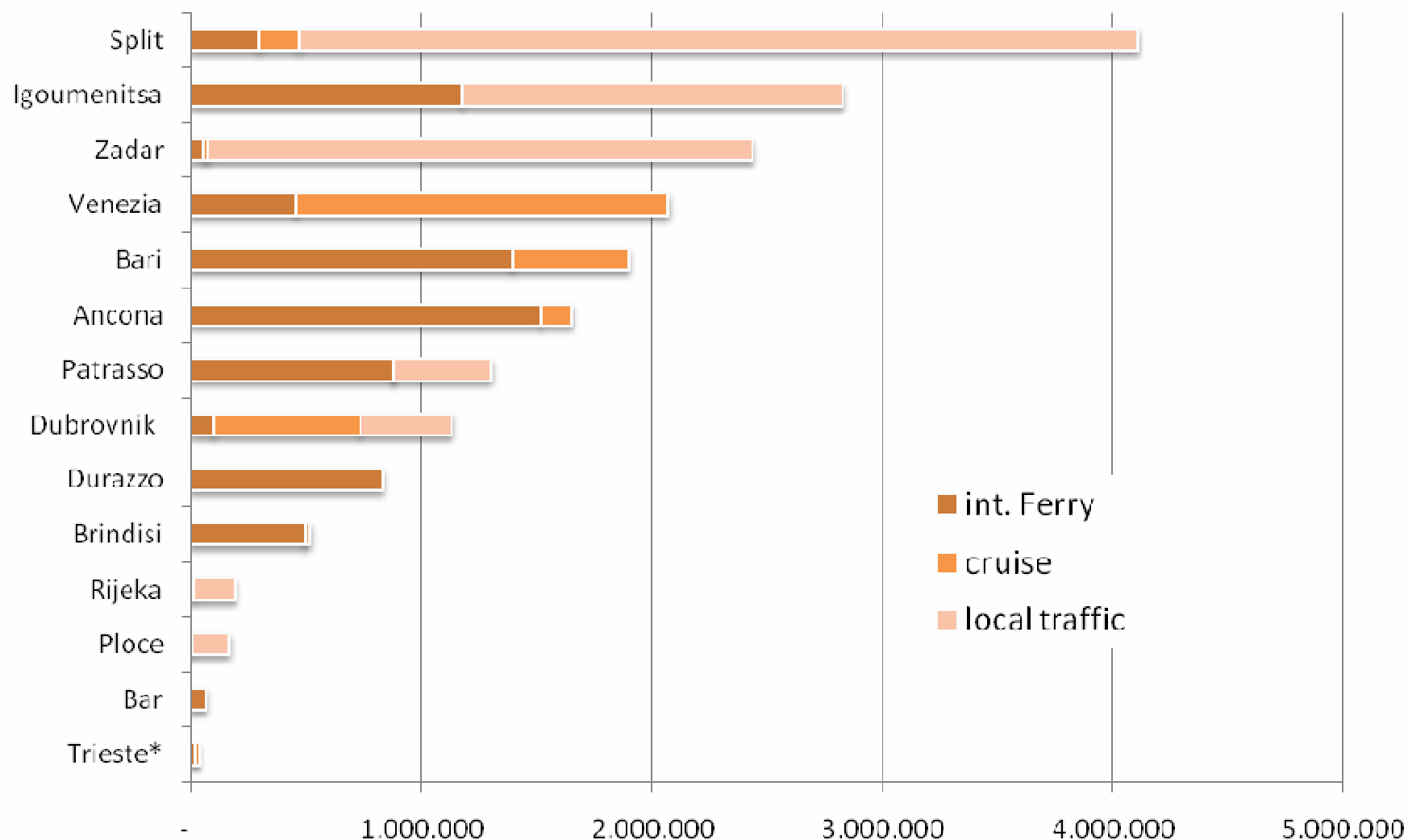
● FINANCIAL MEASURES TO DEVELOP SSS
TRAFFICS

A-I PORTS: INTERNATIONAL PASSENGER MOVEMENTS 2010



Source: ISTAO OTM on Port Authorities data

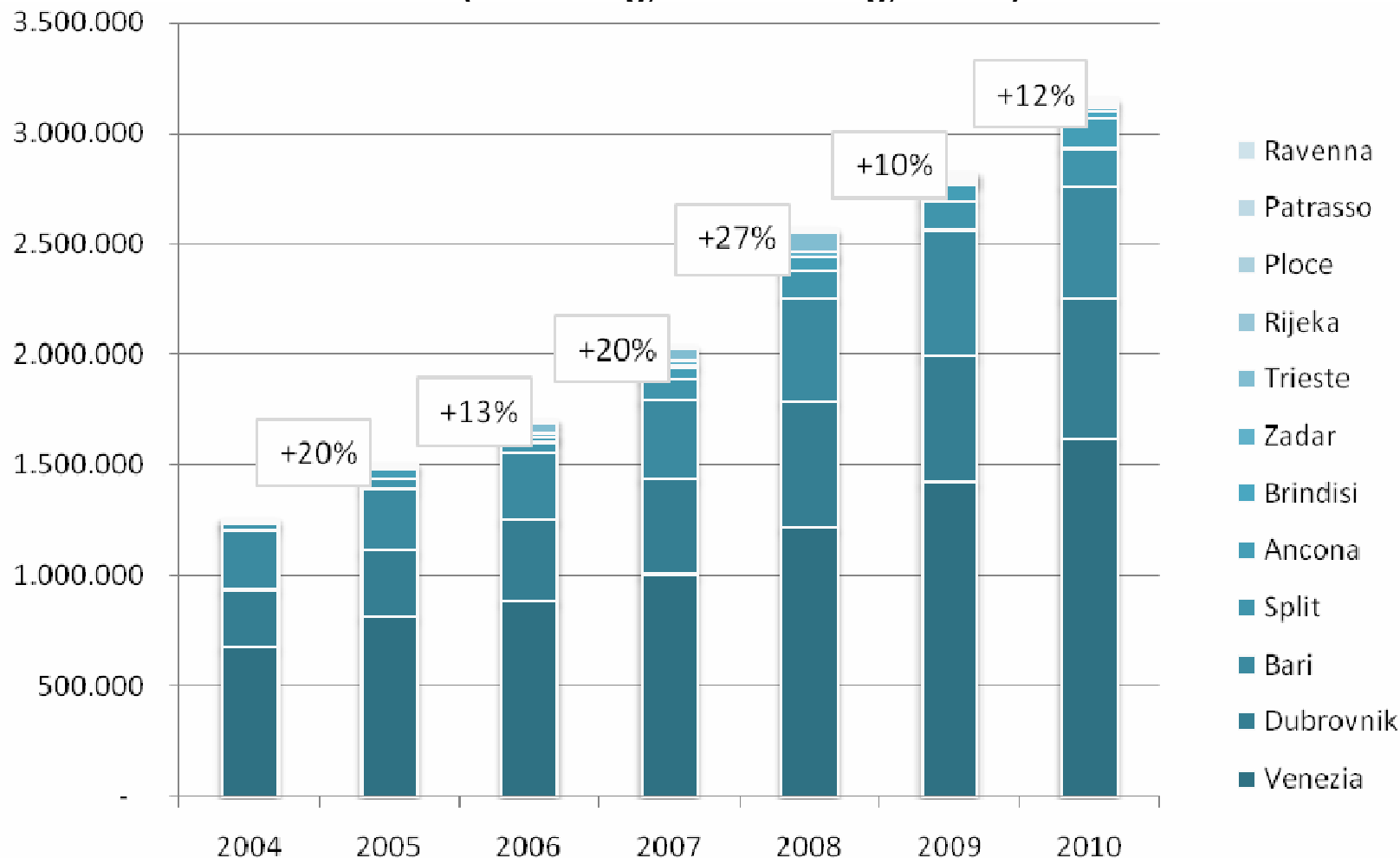
A-I PORTS: INTERNATIONAL+LOCAL PASSENGER MOVEMENTS 2010



Source: ISTAO OTM on Port Authorities data

CRUISE TRAFFIC

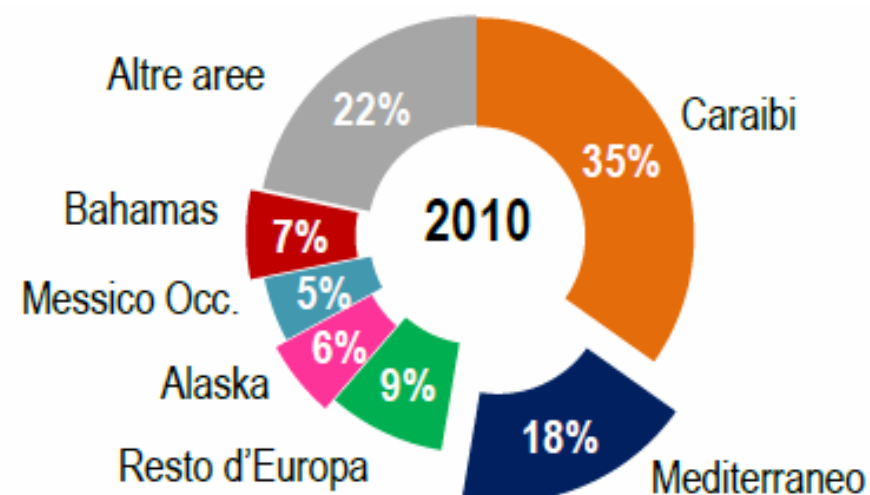
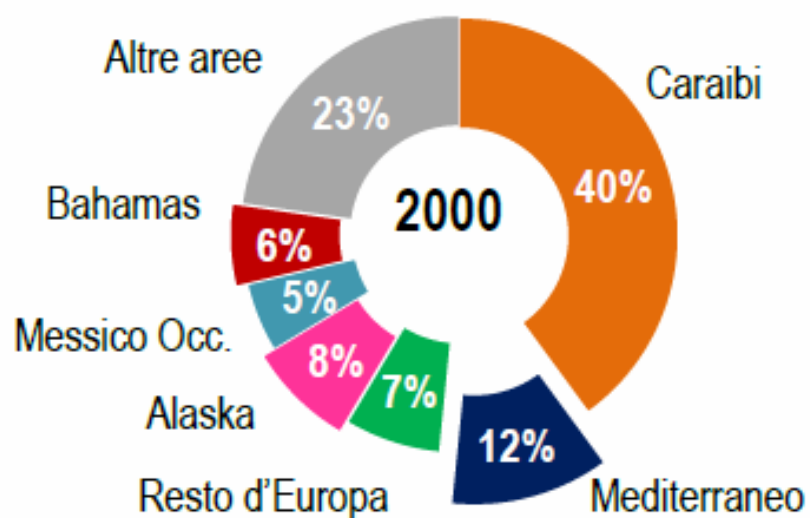
CRUISE PASSENGERS (embarking, disembarking, transit) - TREND 2004-2010



Source: ISTAO OTM on Port Authorities data

CRUISE TRAFFIC

CRUISE PASSENGERS (capacity of sleeping accomodations every destination area)



Source: ISTAO OTM on Port Authorities data

A-I PORTS: TRENDS

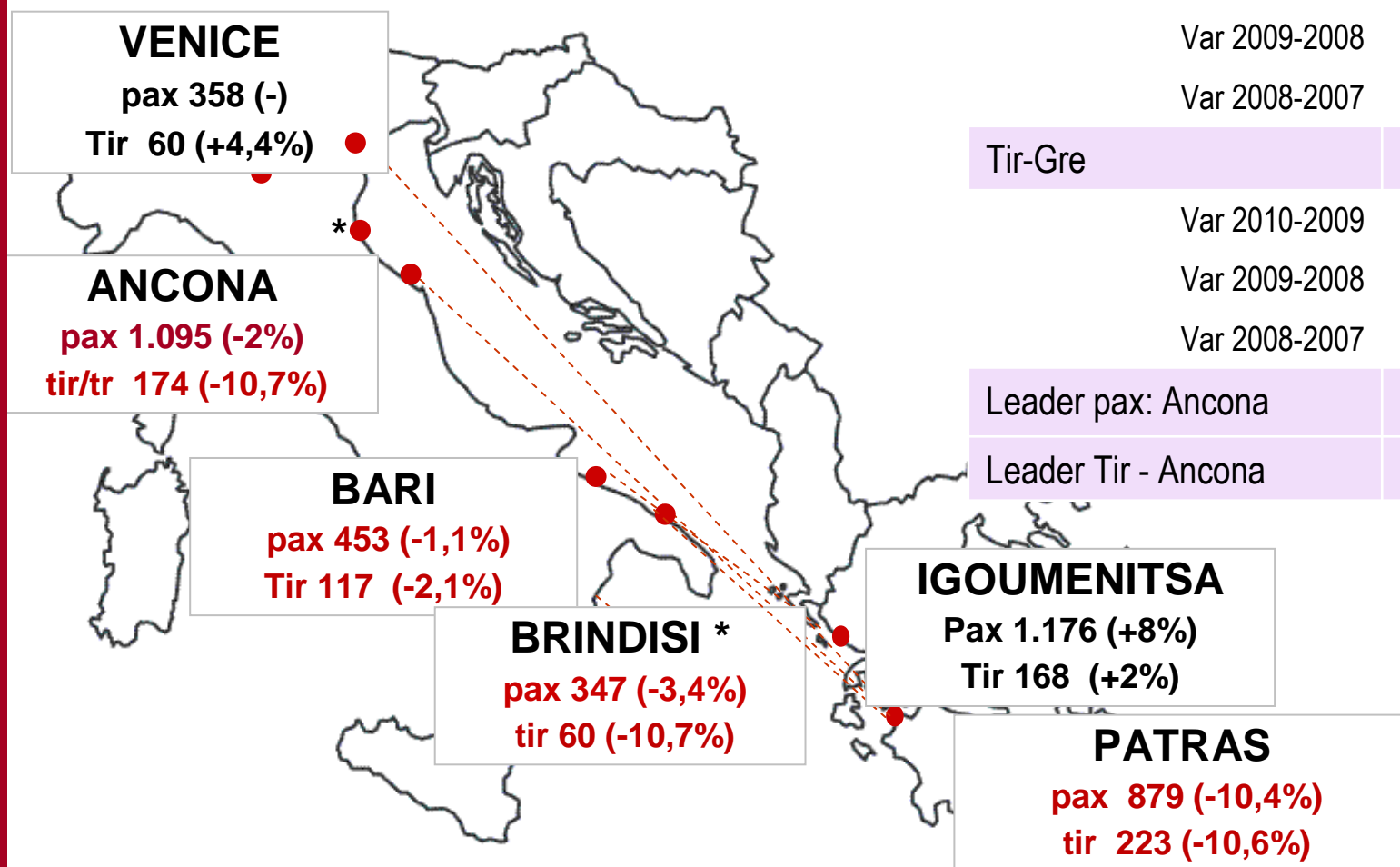
INTERNATIONAL PASSENGERS MOVEMENTS. TREND 2001- 2009

	2005	2006	2007	2008	2009	2010
Venezia	815.153	885.664	1.003.529	1.215.088	1.420.980	1.617.011
	20%	9%	13%	21%	17%	14%
Dubrovnik	297.466	367.321	435.486	571.328	573.742	637.269
	14%	23%	19%	31%	0%	11%
Bari	277.979	303.388	351.897	465.739	567.885	507.712
	6%	9%	16%	32%	22%	-11%
Split	47.315	46.999	99.281	124.871	131.833	172.378
	39%	-1%	111%	26%	6%	31%
Ancona	39.638	18.916	48.652	61.423	75.445	135.858
	701%	-52%	157%	26%	23%	80%

Source: ISTAO otm on Port Authorities data

INTERNATIONAL MOVEMENT TOWARD AND FROM GREECE -2010

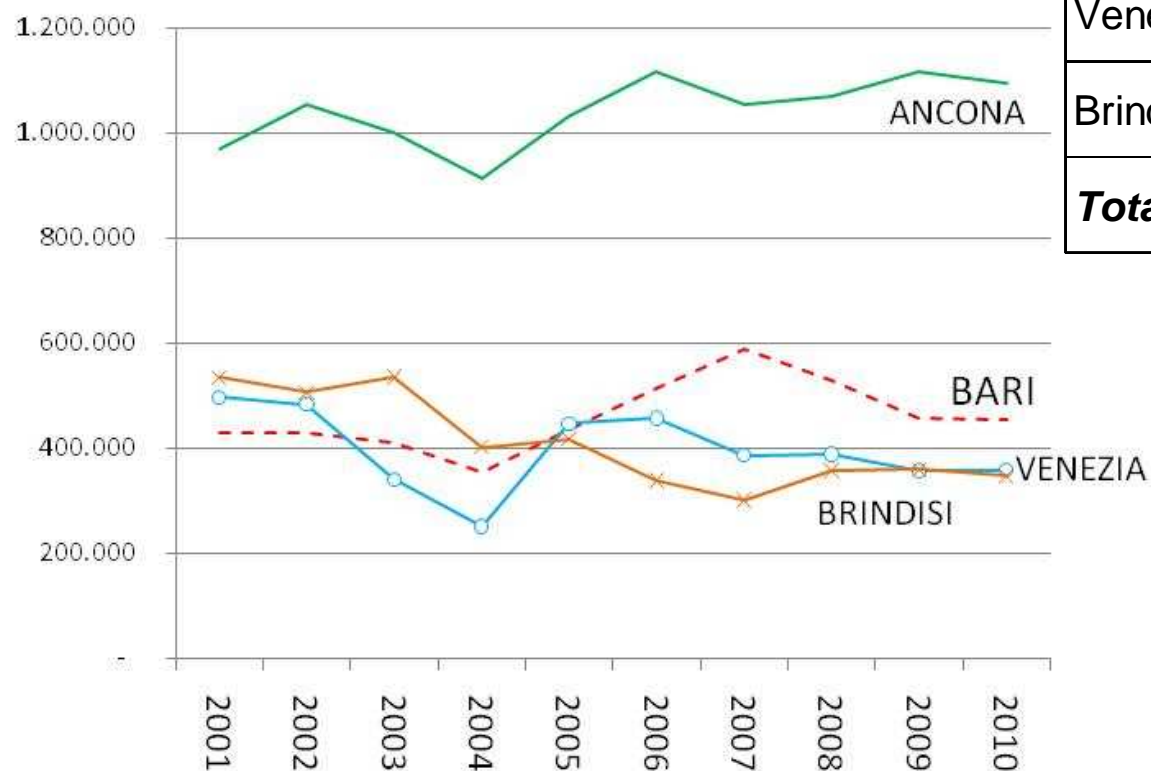
**Thousands of pax and tir
variation to 2009**



Pax Ita-Gre	2,25 mil
Var 2010-2009	-1,7%
Var 2009-2008	-2,1%
Var 2008-2007	+1,6%
Tir-Gre	392.928
Var 2010-2009	-6,5%
Var 2009-2008	-14,6%
Var 2008-2007	+6,4%
Leader pax: Ancona	49%
Leader Tir - Ancona	40%

Source: ISTAO OTM on Port Authorities data

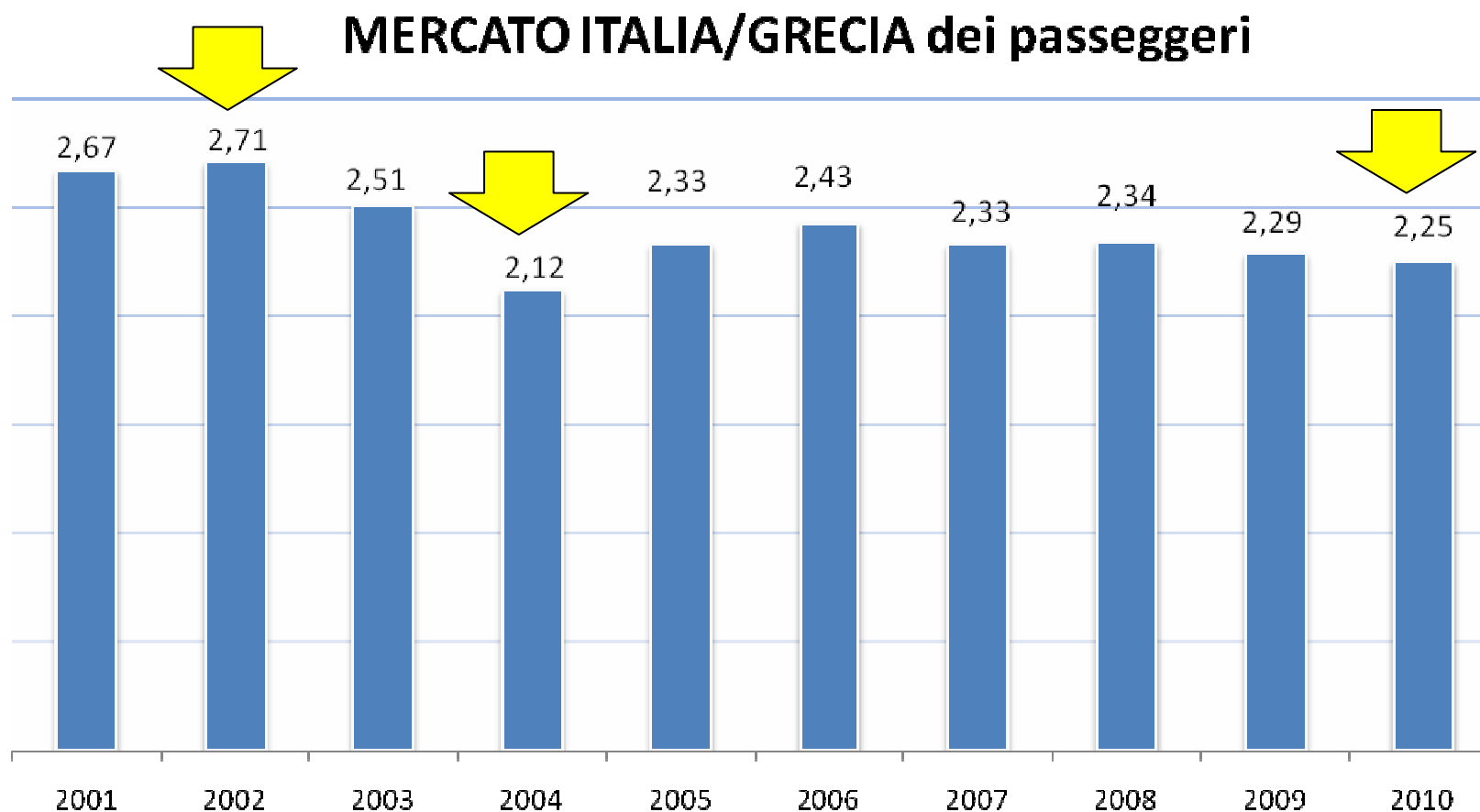
INTERNATIONAL MOVEMENT TOWARD AND FROM GREECE PAX 2001 - 2010



	2010	Var %
Ancona	1.094.548	-2%
Bari	452.480	-1%
Venezia	357.813	0%
Brindisi	346.699	-3%
Totale	2.251.540	-2%

Fonte: elaborazioni OTM su dati AP

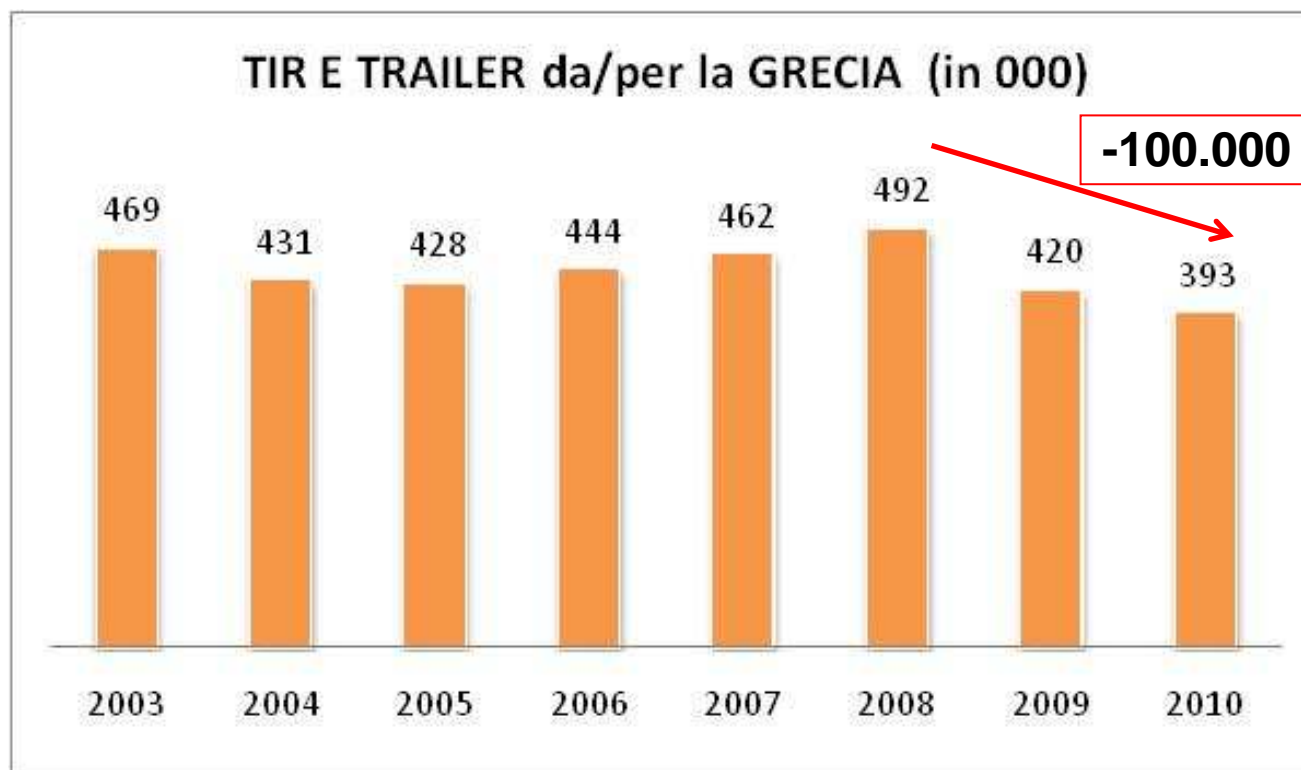
INTERNATIONAL MOVEMENT TOWARD AND FROM GREECE – PAX TREND



Fonte: elaborazioni OTM su dati AP

INTERNATIONAL MOVEMENT TOWARD AND FROM GREECE – tir trailer trend

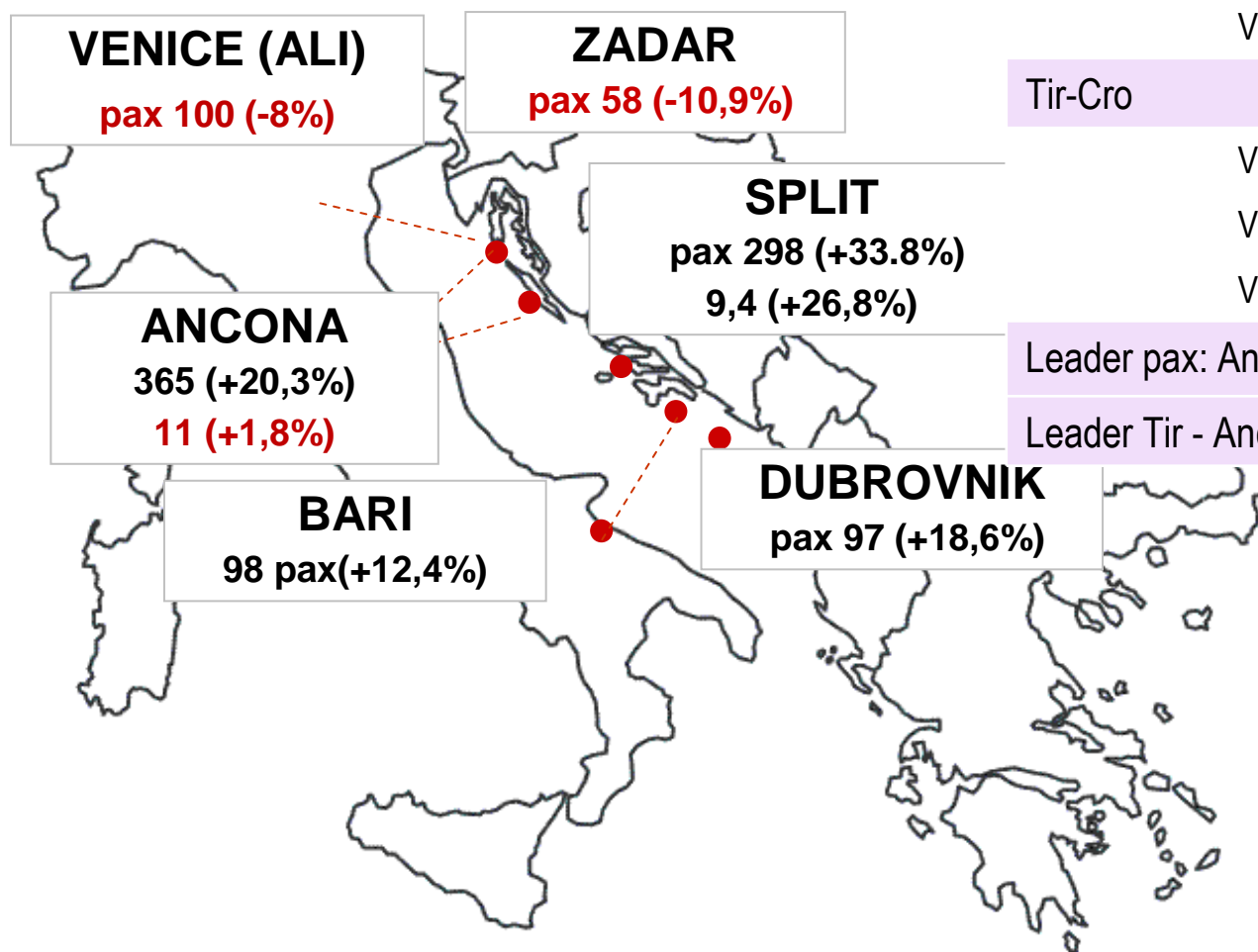
	2009	2010	Var %
Ancona	174.331	155.698	-11%
Bari	119.609	117.144	-2%
Brindisi	67.612	60.398	-11%
Venezia	57.159	59.688	4%
Totale	418.711	392.928	-6%



Fonte: elaborazioni OTM su dati AP

INTERNATIONAL MOVEMENTS TOWARD AND FROM CROATIA – 2010

Thousands of pax and tir
variation to 2009



Pax Ita-Cro	564.000
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Var 2010-2009	+11,8%
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Var 2009-2008	+0,1%
---------------	-------

Var 2008-2007	-5,2%
---------------	-------

Tir-Cro	12.115
---------	--------

Var 2010-2009	+5,5%
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Var 2009-2008	-18%
---------------	------

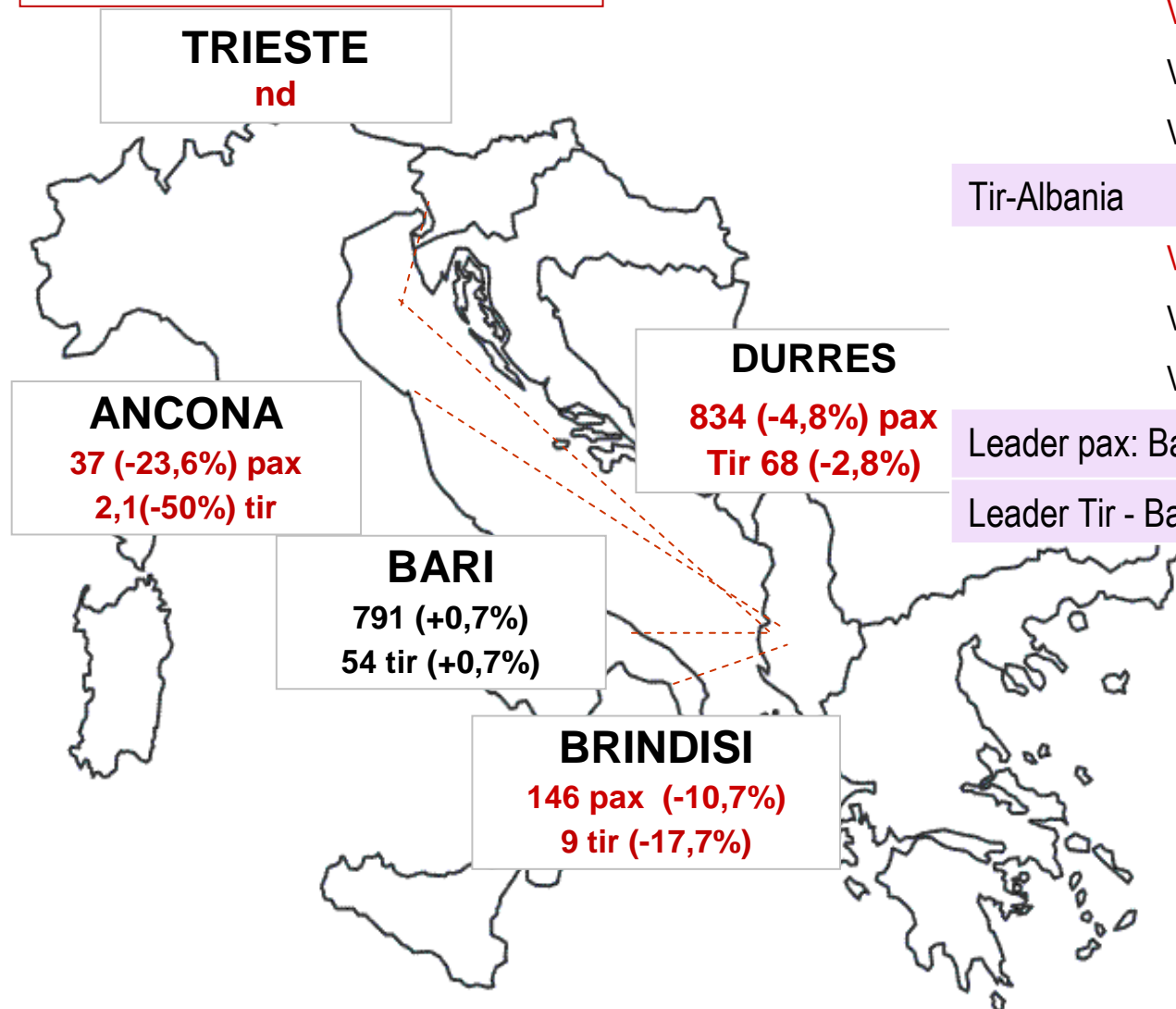
Var 2008-2007	-1%
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Leader pax: Ancona	65%
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Leader Tir - Ancona	100%
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INTERNATIONAL MOVEMENTS TOWARD AND FROM ALBANIA – 2010

Thousands of pax and tir
variation to 2009



Pax Ita-Albania	974.630
-----------------	---------

Var 2010-2009	-4,8
---------------	------

Var 2009-2008	+12,1%
---------------	--------

Var 2008-2007	+5%
---------------	-----

Tir-Albania	68.462
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Var 2010-2009	-2,8
---------------	------

Var 2009-2008	+0,7%
---------------	-------

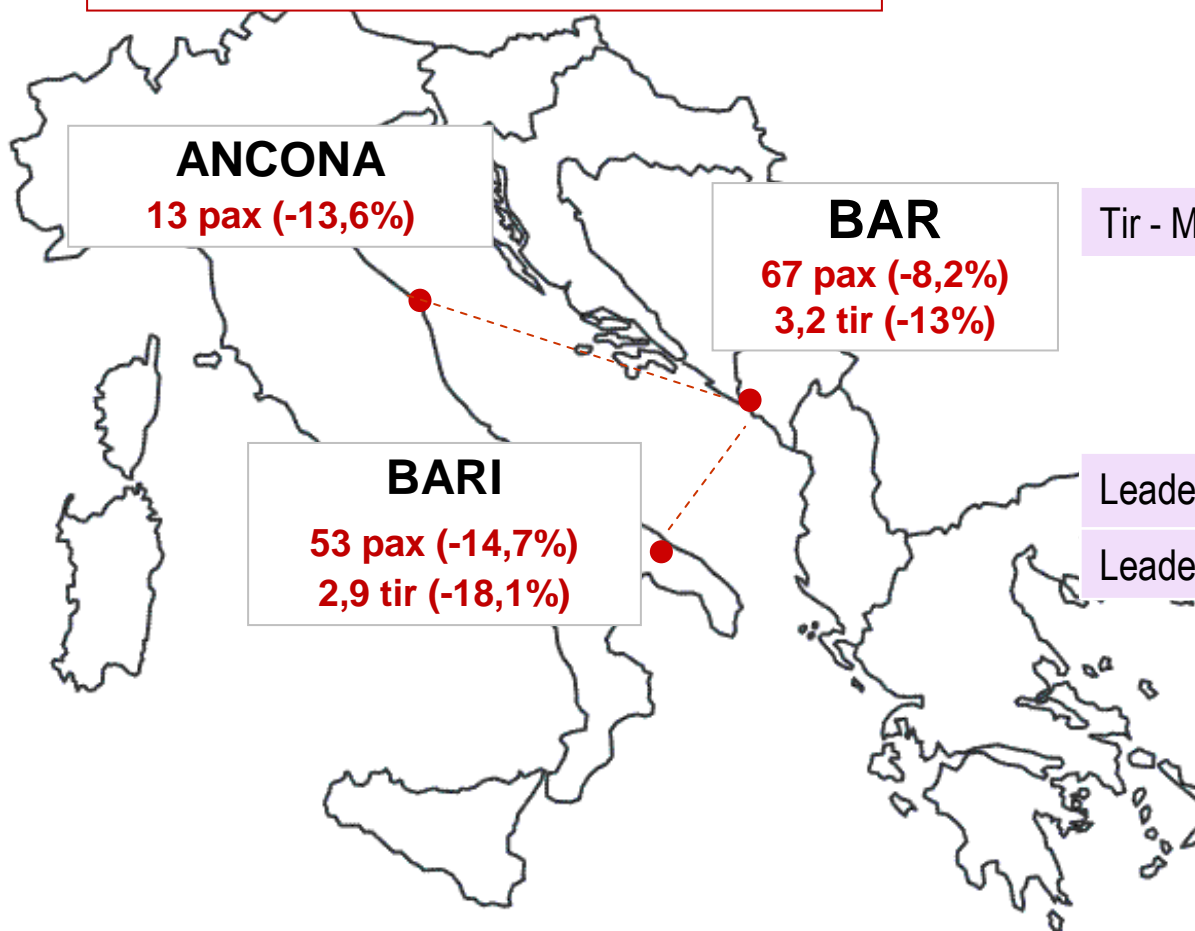
Var 2008-2007	+11,7%
---------------	--------

Leader pax: Bari	81%
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Leader Tir - Bari	83%
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INTERNATIONAL MOVEMENTS TOWARD AND FROM MONTENEGRO – 2010

**Thousands of pax and TIR
variation to 2009**



Pax Ita - Montenegro	65.893
----------------------	--------

Var 2010-2009	-14,5%
---------------	--------

Var 2009-2008	-17%
---------------	------

Var 2008-2007	+3,8%
---------------	-------

Tir - Montenegro	3.022
------------------	-------

Var 2010-2009	-18,1%
---------------	--------

Var 2009-2008	-26,2%
---------------	--------

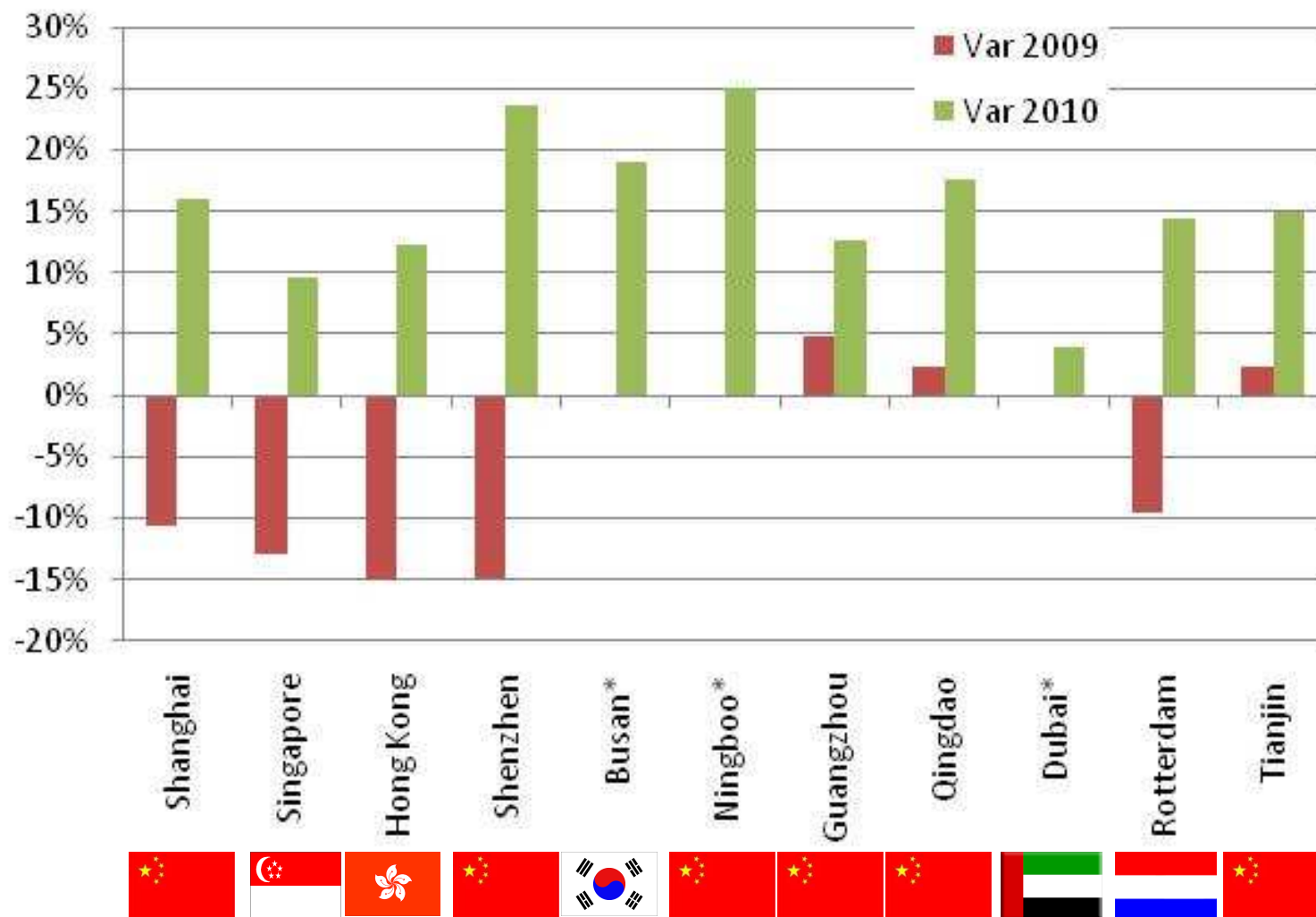
Var 2008-2007	+2,8%
---------------	-------

Leader pax: Bari	80%
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Leader Tir - Bari	96%
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TRAFFIC OF CONTAINERS IN THE MAIN MARITIME PORTS OF THE WORLD

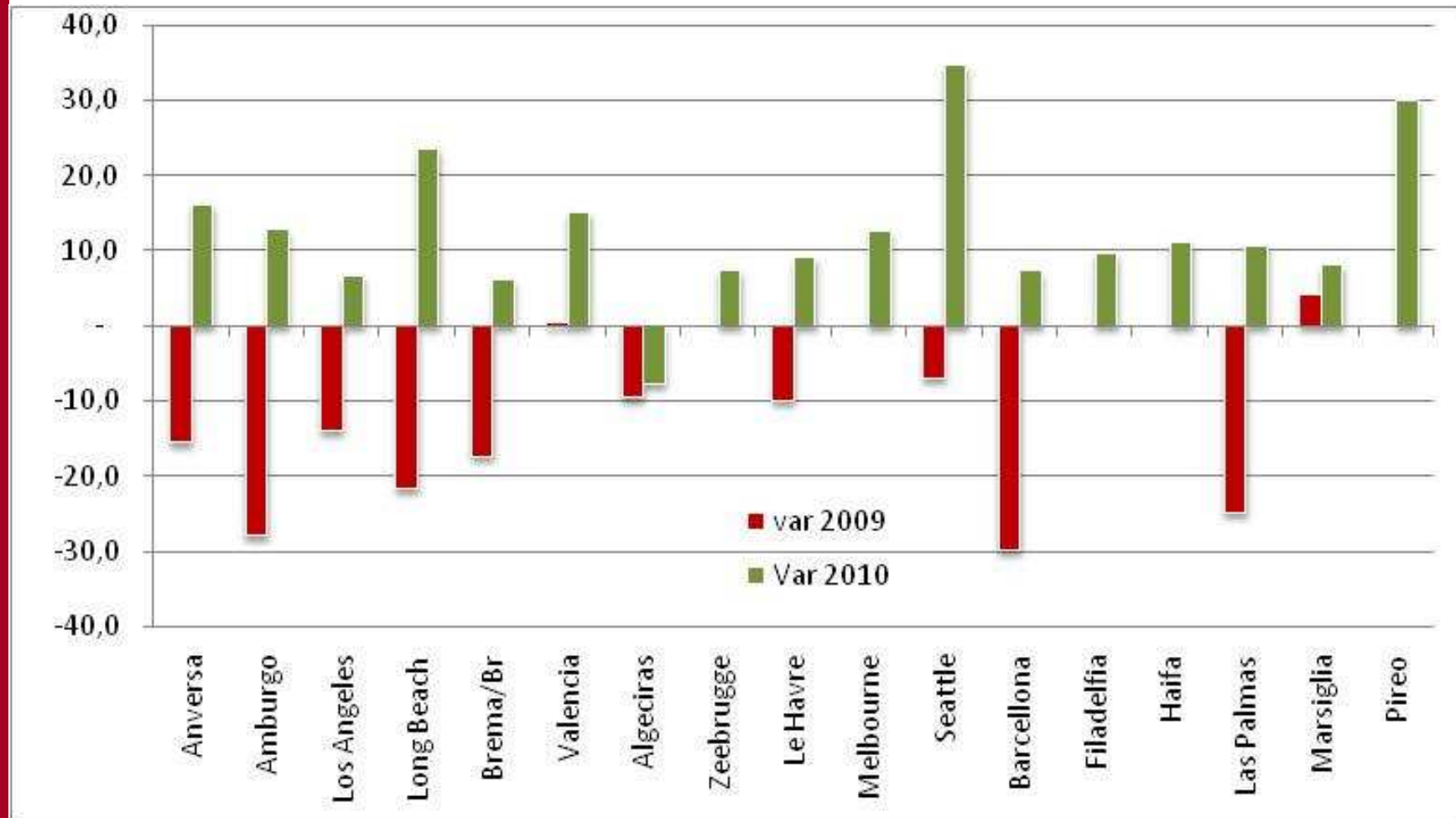
WORLD MARITIME PORTS OVER 10 MIL TEUS Var 2009 and 2010



Fonte: elaborazioni OTM su dati AP

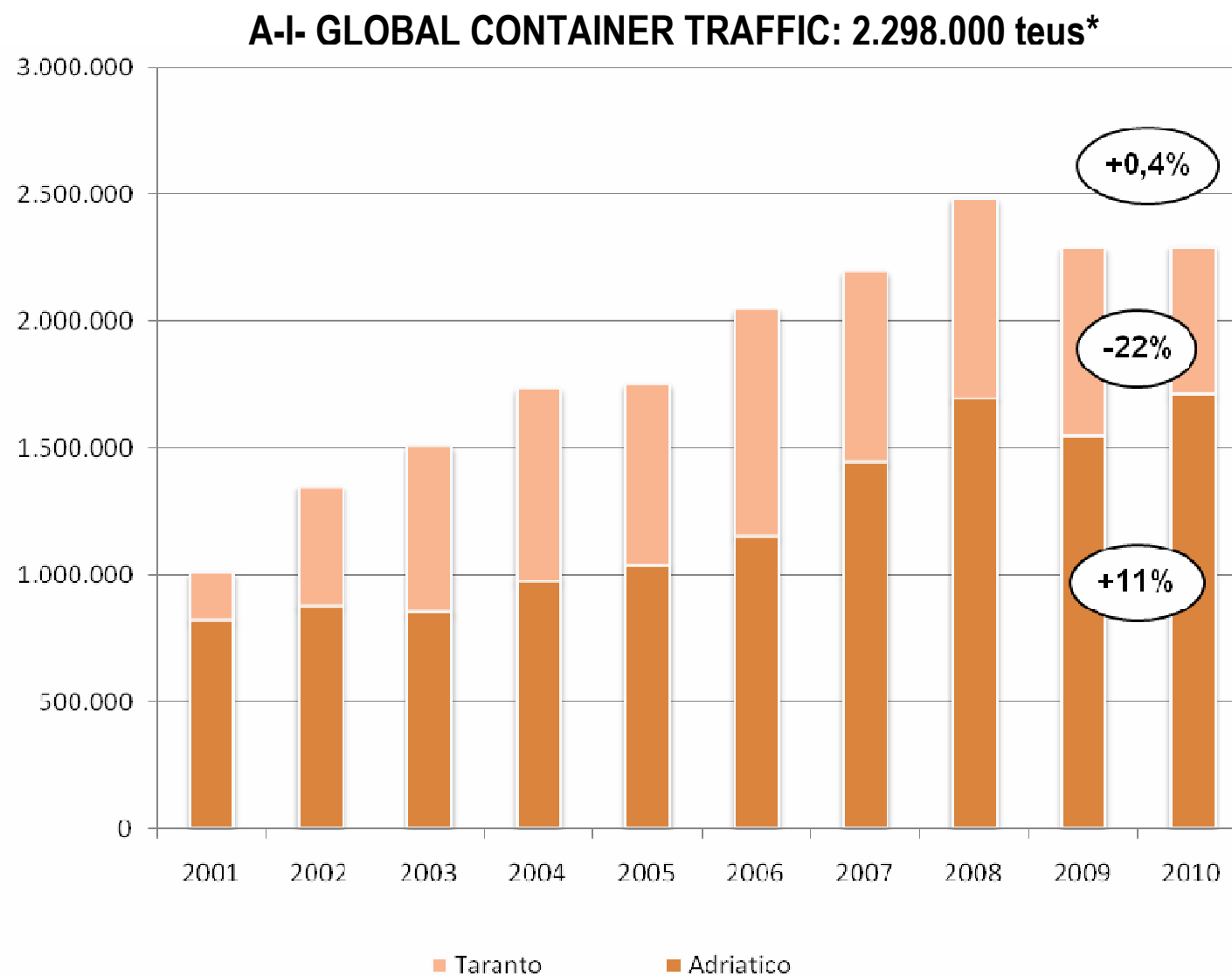
TRAFFIC OF CONTAINERS IN THE MAIN MARITIME PORTS OF THE WORLD

OTHER MARITIME PORTS WHICH ARE LEADERS IN THE TEU TRAFFIC – Var 2008-2009



■ Everyone is positive (except to Algeciras) with a change at least over 7%

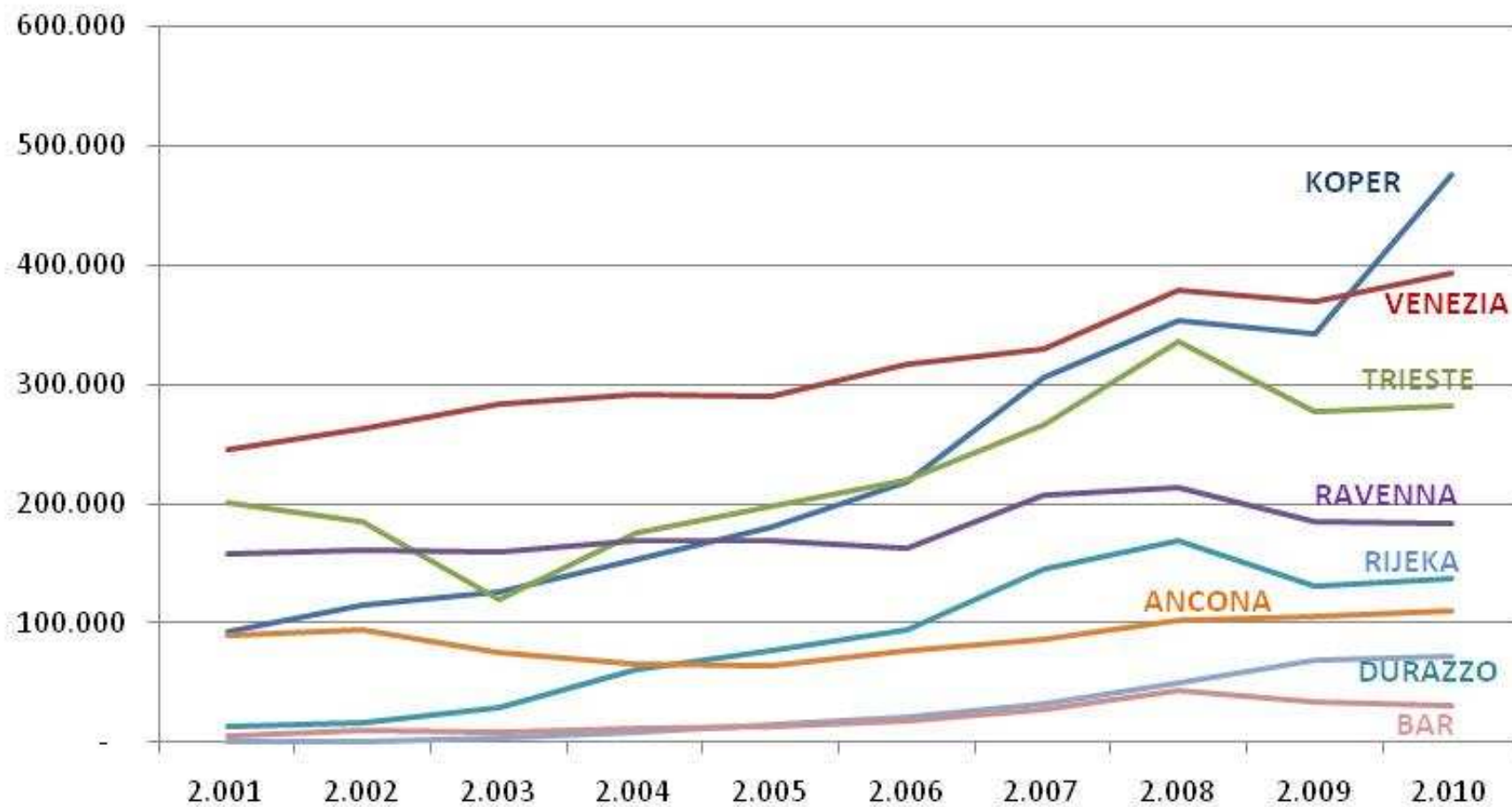
CONTAINER MOVEMENTS IN A-I AREA – 2009



Source: ISTAO OTM on Port Authorities data

*estimated

CONTAINER TRAFFIC TREND IN ADRIATIC SEA



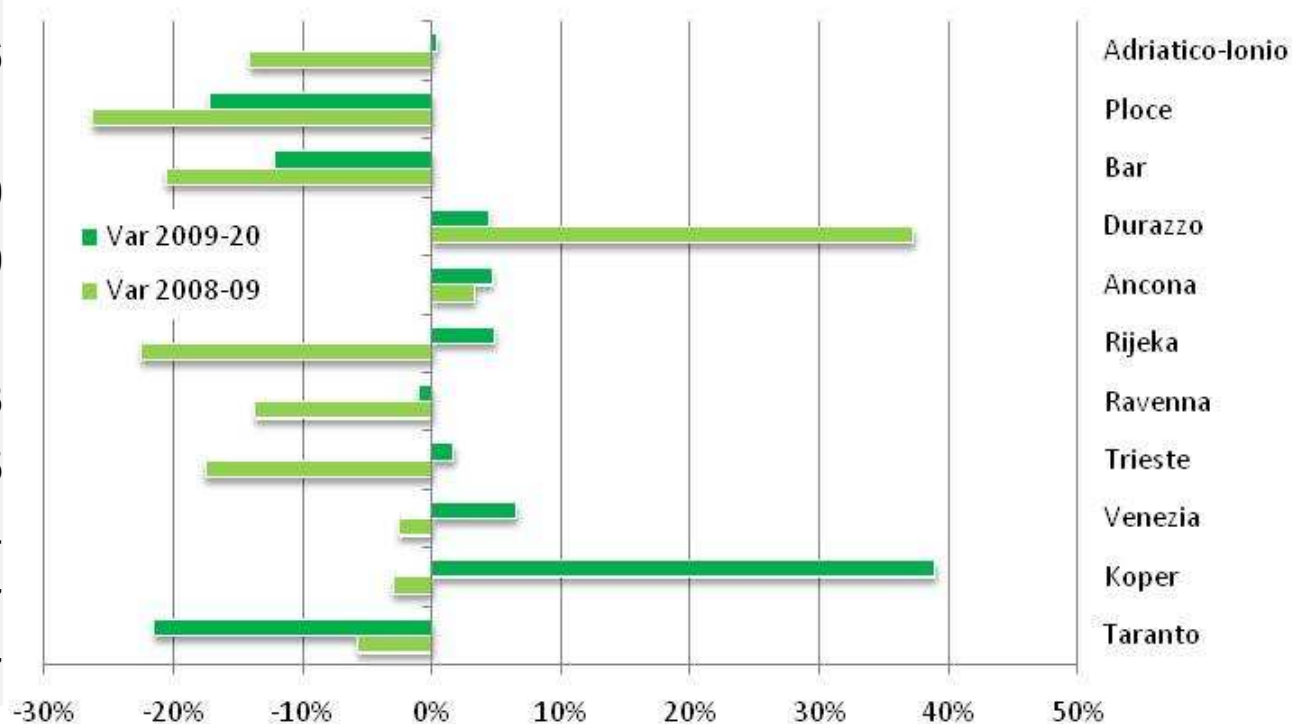
Source: ISTAO OTM on Port Authorities data

CONTAINER TRAFFIC TREND

CONTAINER TRAFFIC TEU IN THE MAIN ADRIATIC AND IONIAN PORTS

	2010
Taranto	581.936
Koper	476.731
Venezia	393.459
Trieste	281.629
Ravenna	183.041
Rijeka	137.048
Ancona	110.395
Durazzo	71.614
Bar	30.477
Ploce	21.457

Variation 2010-2009 and 2009-2008



Source: ISTAO OTM on Port Authorities data

● TRAFFIC AND TRENDS

● **SSS E EAST MED**

● FINANCIAL MEASURES TO DEVELOP SSS
TRAFFICS

PORTS IN NORTH AFRICA: BETWEEN THREATS AND CHANCES

3 - IL MEDITERRANEO DEI TRAFFICI

Porti del Northern Range		
		Teu*
Le Havre	(Francia)	2.512.000
Anversa	(Belgio)	8.438.000
Rotterdam	(Paesi Bassi)	11.000.000
Amsterdam	(Paesi Bassi)	435.129
Bremerhaven	(Germania)	4.551.845
Amburgo	(Germania)	1.930.000

- There is a safe threat for the Italian hub ports about containers. It's less for feeder ports or gateway (as Trieste or Genoa)

Tangeri

2009: 1,

2010: 2.000.000

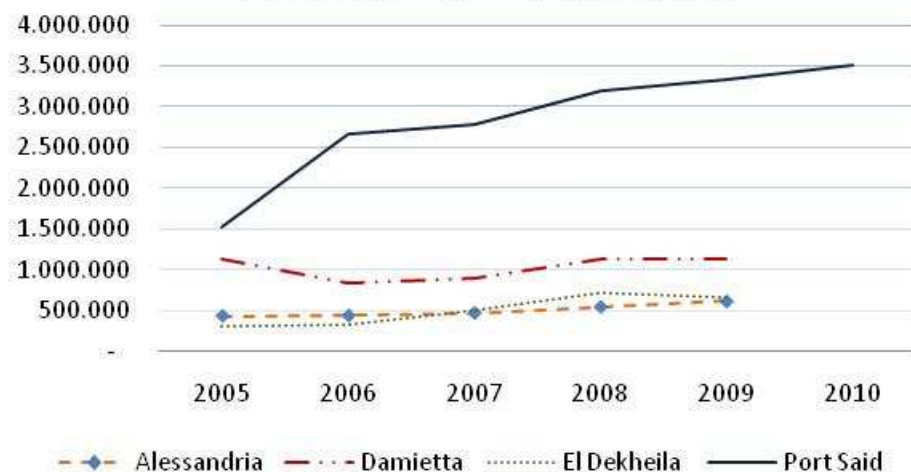
Transshipment Companies	
Möller-Maersk	DPWorld
Cma-Cgm	China Shipping
Msc	Evergreen
Eurokai Contship	Psa
Cosco	Porto in fase di privatizzazione

Damietta :
1,2 milioni

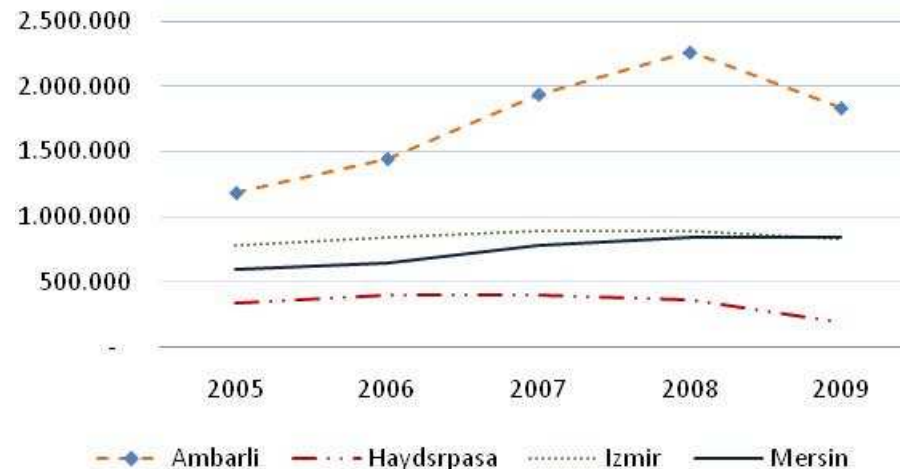
Port Said
2009: 3,3 milioni
2010 3,5 milioni

EAST MED – New ports

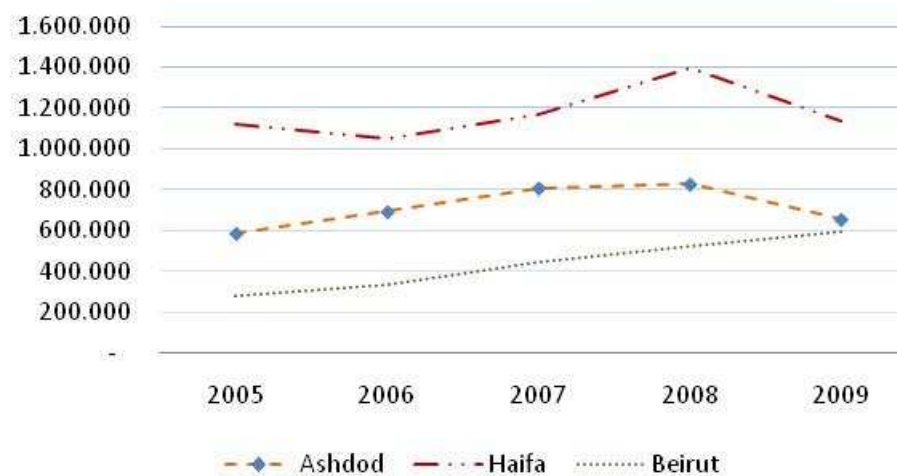
PORTI EGIZIANI - traffico in Teus



PORTI TURCHI - traffico in Teus



PORTI ISRAELE E LIBANO - traffico in Teus



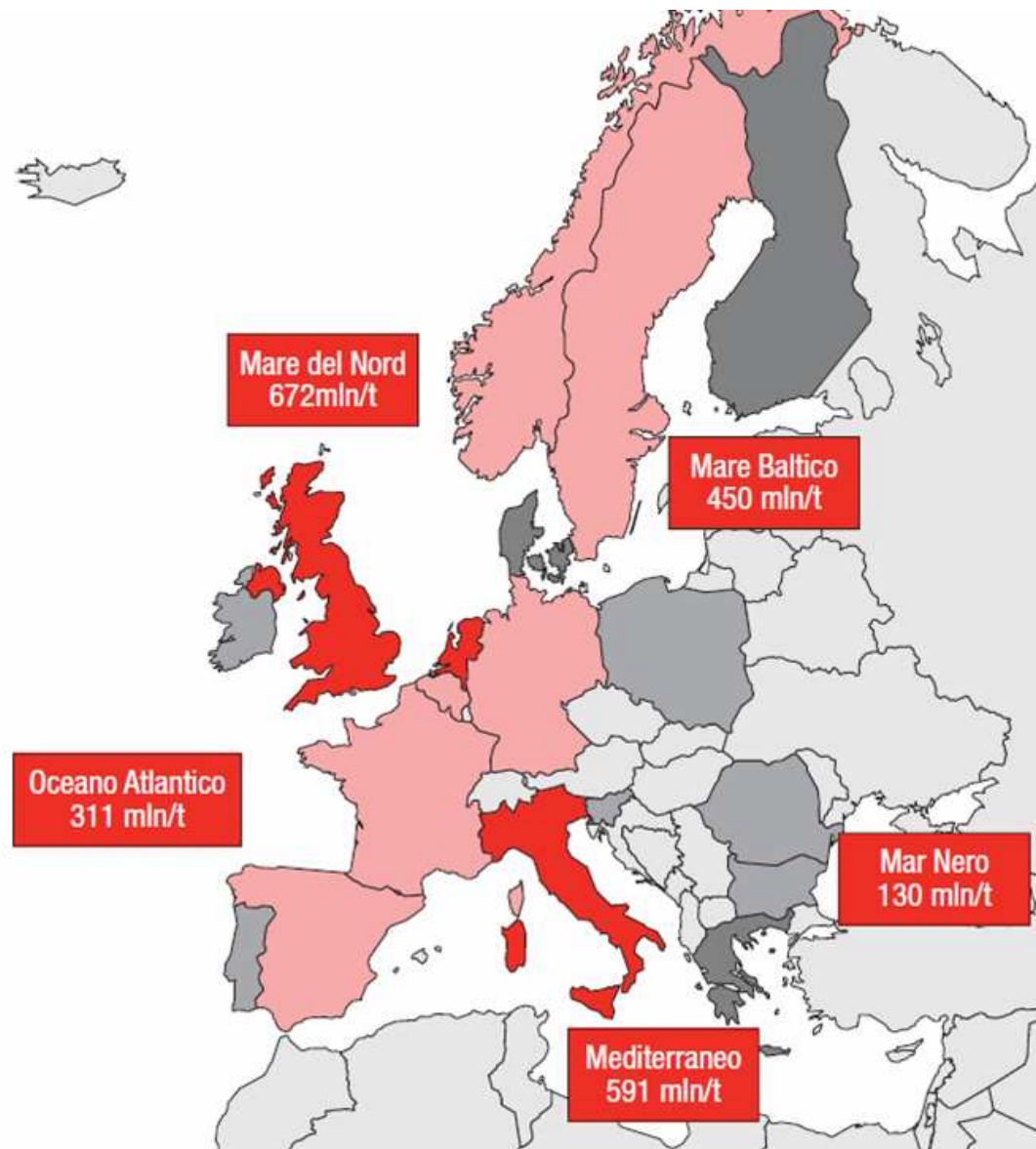
Fonte: elaborazione OTM su dati AP e Assoporti

THE MEDITERRANEAN AND THE SHORT SEA SHIPPING TRAFFIC



**Italy: settlement of
SSS traffics every
kind of loaded**

	%
Fluid bulks	56,0
Dry bulks	12,4
Containers	13,5
RO-RO	12,5
Others	5,6



Fonte: MCC, Eurostat, 2009

REASONS WHY RO-RO AND RO-PAX TRAFFICS HAVE GOT AN HIGH POTENTIAL

1

STRUCTURAL FEATURES OF THE SERVICE

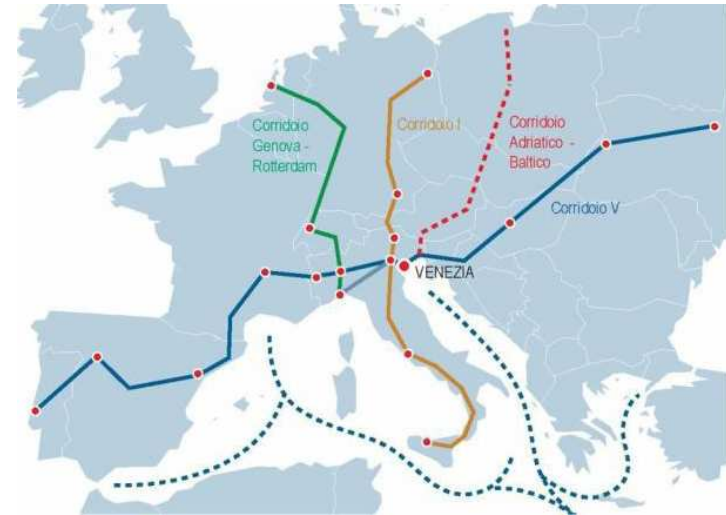
- High capacity of **Integration** with other transport systems
- **Flexibility** of transport capacity (passangers, trailers, cars, pallettized goods,...)
- **Speed** of transactions of loading/unloading, stowage and morring.
- **Adaptability** to external shocks (see last crisis)
- The increase of **cruise speed** in the ships (till 25 knots for Ro-ro and about 30 knots for Ro-pax)

REASONS WHY RO-RO AND RO-PAX TRAFFICS HAVE GOT AN HIGH POTENTIAL

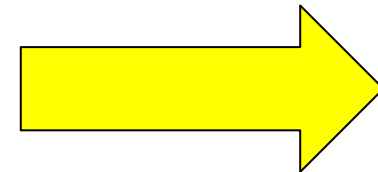
2 MEDIUM AND SHORT RANGE PROMOTIONAL POLICIES FOCUSING ON ENVIRONMENTAL TOPICS

- ...both Community level (Marco Polo, Sea Highways)
- ...and national level (Ecobonus)

TEN PROGRAMS in ITALY AND MED

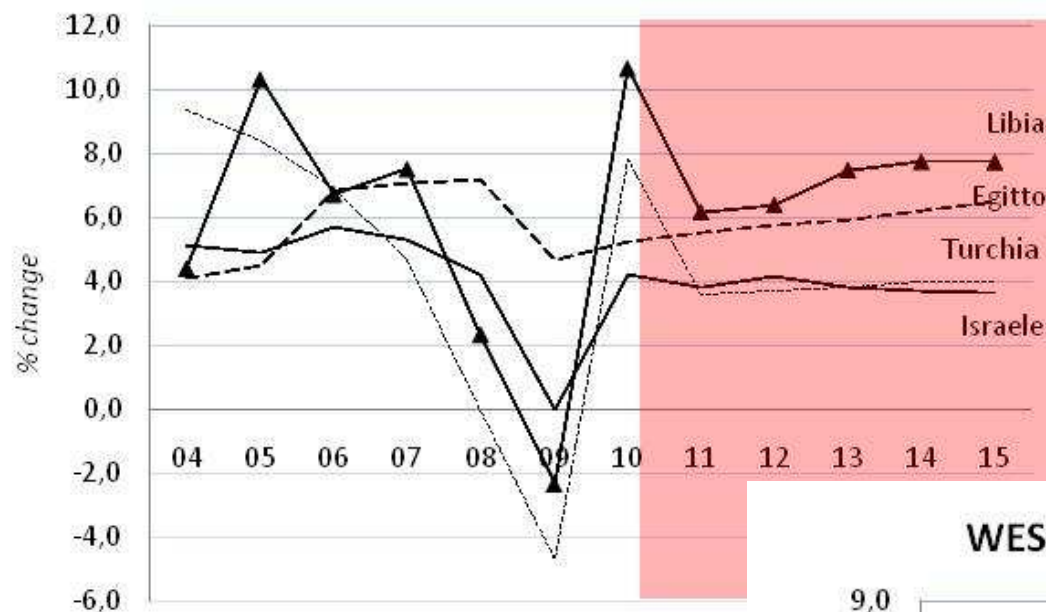


3 DEVELOPMENT OF THE MEDITERRANEAN AFRICA

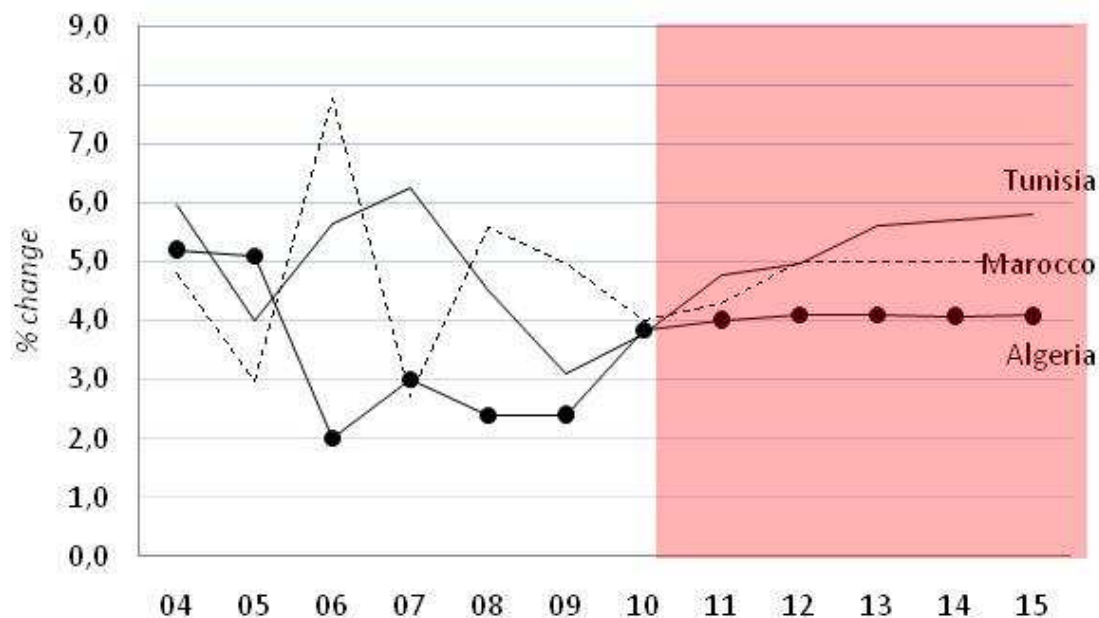


NORTH AFRICA MARITIME PORTS AND INFRA-MEDITERRANEAN TRAFFIC

EAST MED - Var % GDP (prezzi costanti)










WEST MED - Var % GDP (prezzi costanti)



Fonte: elaborazione OTM su dati IMF, 2010

POTENTIALITIES: POPULATION

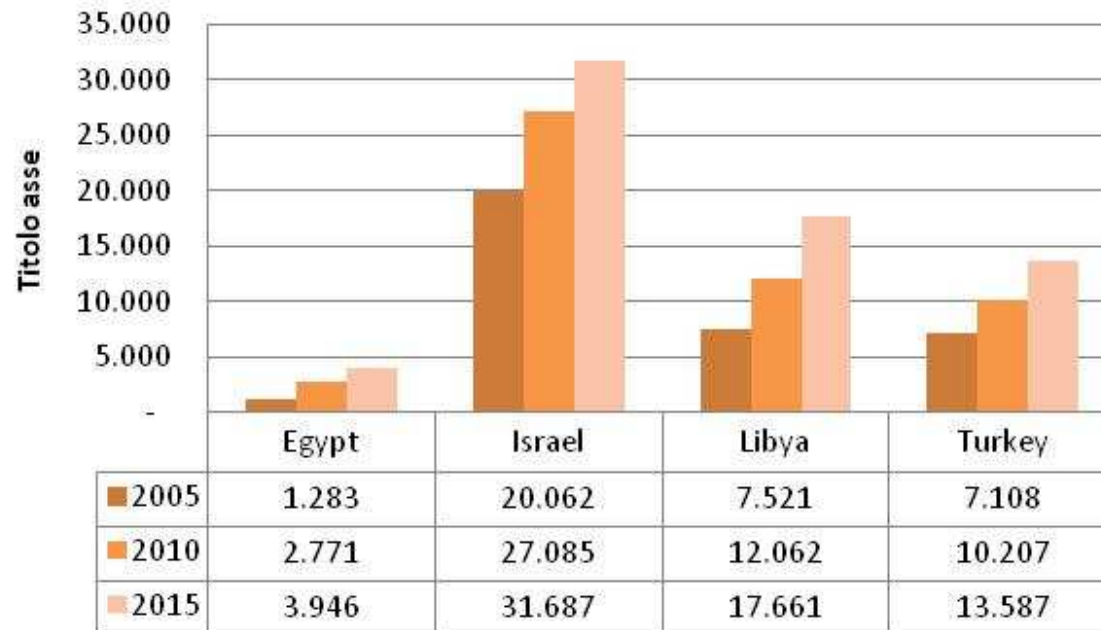
Per million inhabitants

		2005	2010	2015
	Egypt	70	78	86
	Turkey	68	71	76
	Israel	7	7	8
	Libya	6	6	7
East Med		150	164	178
	Marocco	30	32	33
	Algeria	33	36	38
	Tunisia	10	11	11
West Med		73	78	83

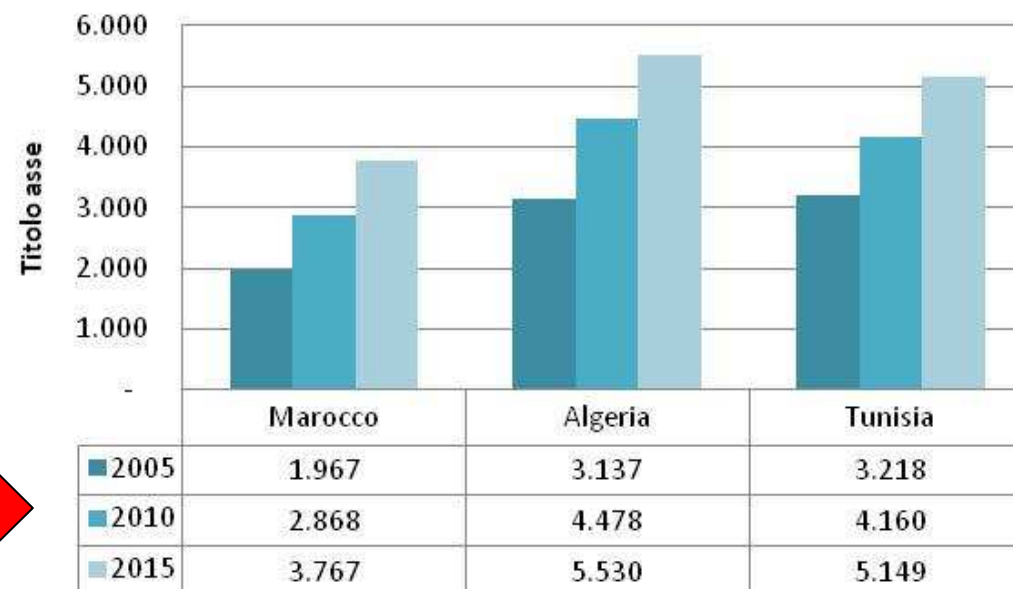
Fonte: elaborazione OTM su dati IMF, 2010

SOCIAL ISSUE

East Med - Reddito pro capite (in \$)

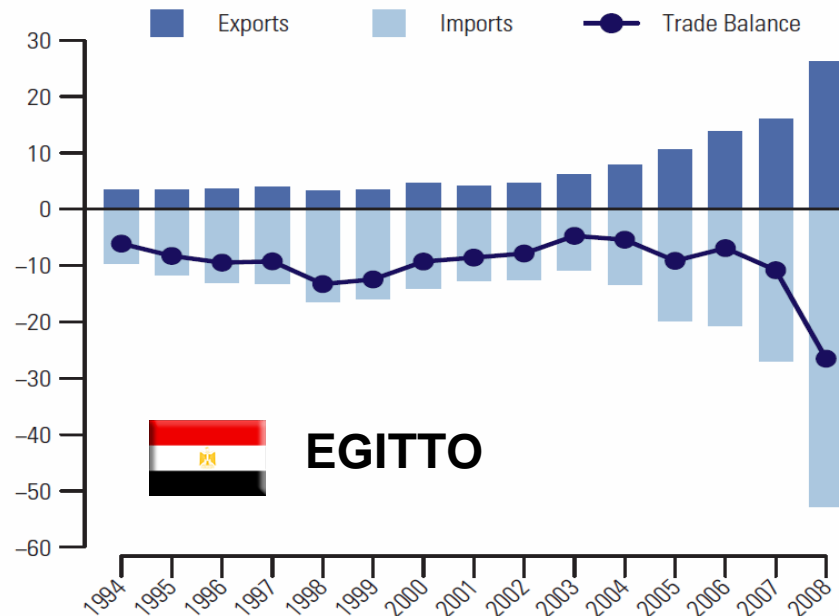


West Med - Reddito pro capite (in .000 \$)

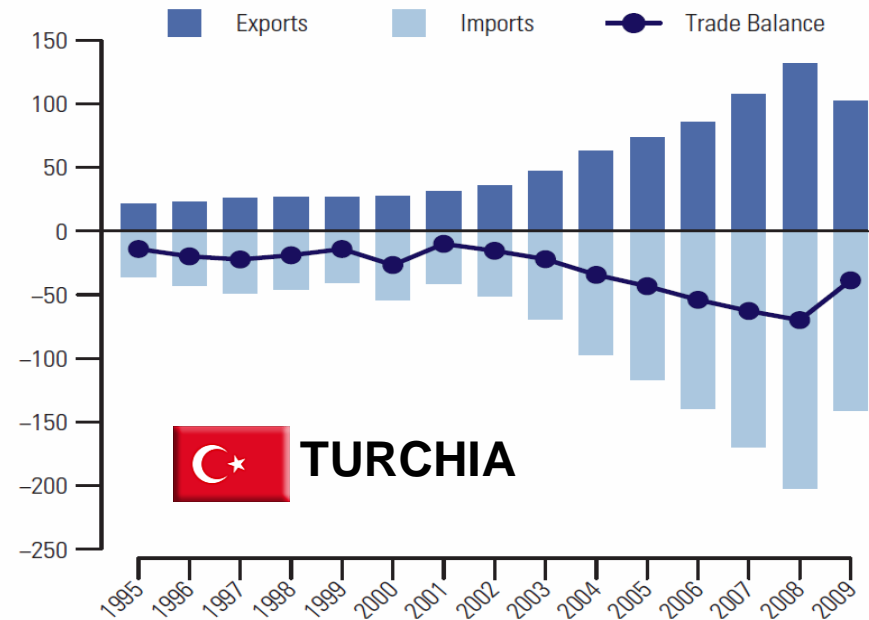


Fonte: elaborazione OTM su dati IMF, 2010

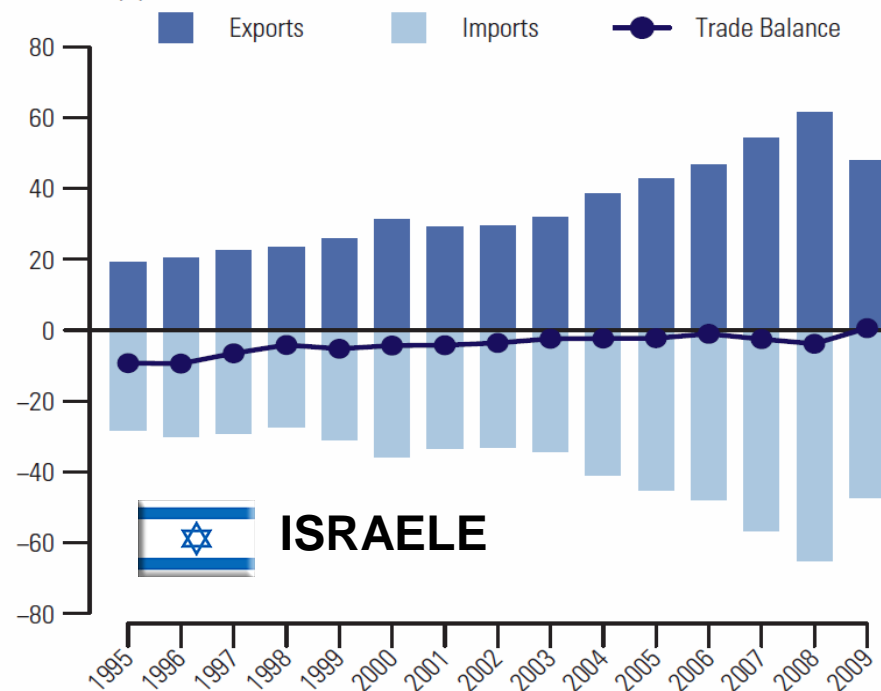
(Bln US\$ by year)



(Bln US\$ by year)





























(Bln US\$ by year)



POTENTIALITIES: INTERNATIONAL OPENING – EAST MED

Fonte: elaborazione OTM su dati IMF, 2010

OPERATORS IN THE INTERNATIONAL LINKS (RO-RO and RO PAX with Italy)

	ADRIATICO	GRECIA	TURCHIA
MEDITERRANEO ORIENTALE	         	      	 
	FRANCIA, SPAGNA, MALTA	TUNISIA	MAROCCO
MEDITERRANEO OCCIDENTALE	 	   	

...WEAK SIGNALS



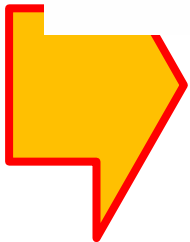
- The service has been set up since about one year. It was introduced by a possible railway link to Monaco.

- **TRAFFIC AND TRENDS**
- **SSS E EAST MED**
- **FINANCIAL MEASURES TO DEVELOP SSS
TRAFFICS**

MARCO POLO PROGRAMME



MARCO POLO | 
NEW WAYS TO A GREEN HORIZON



Marco Polo aims to ease road congestion and its attendant pollution by promoting a switch to greener transport modes for European freight traffic.

MARCO POLO PROGRAMME: FIVE KEYS ACTIONS



Marco Polo key action	Goal
 Modal shift	Switch road freight to rail, sea or inland waterways
 Catalyst action	Support innovations that overcome barriers to non-road transport
 Motorways of the sea	Use sea routes where possible
 Traffic avoidance	Reduce the need for goods transport through better logistics
 Common learning	Encourage joint training and use of common logistical services/systems

MODAL SHIFT ACTION (MOD)



- Just a **service shifting freight from road** – no innovation needed
- **Route** – 2 participating countries **or** 1 EU MS + 1 neighbour third country
- **Threshold** required – **60m tkm** (yearly average!)
- Special threshold for IWW – 13m tkm (yearly average!)
- **Duration** – **≤ 36 months**
- **Subsidy** - lowest figure of
 - ▶ total **deficit** or
 - ▶ 35% of **eligible costs** or
 - ▶ **2€** for each 500 tkm shifted

GENERAL ELEGIBLE CRITERIA

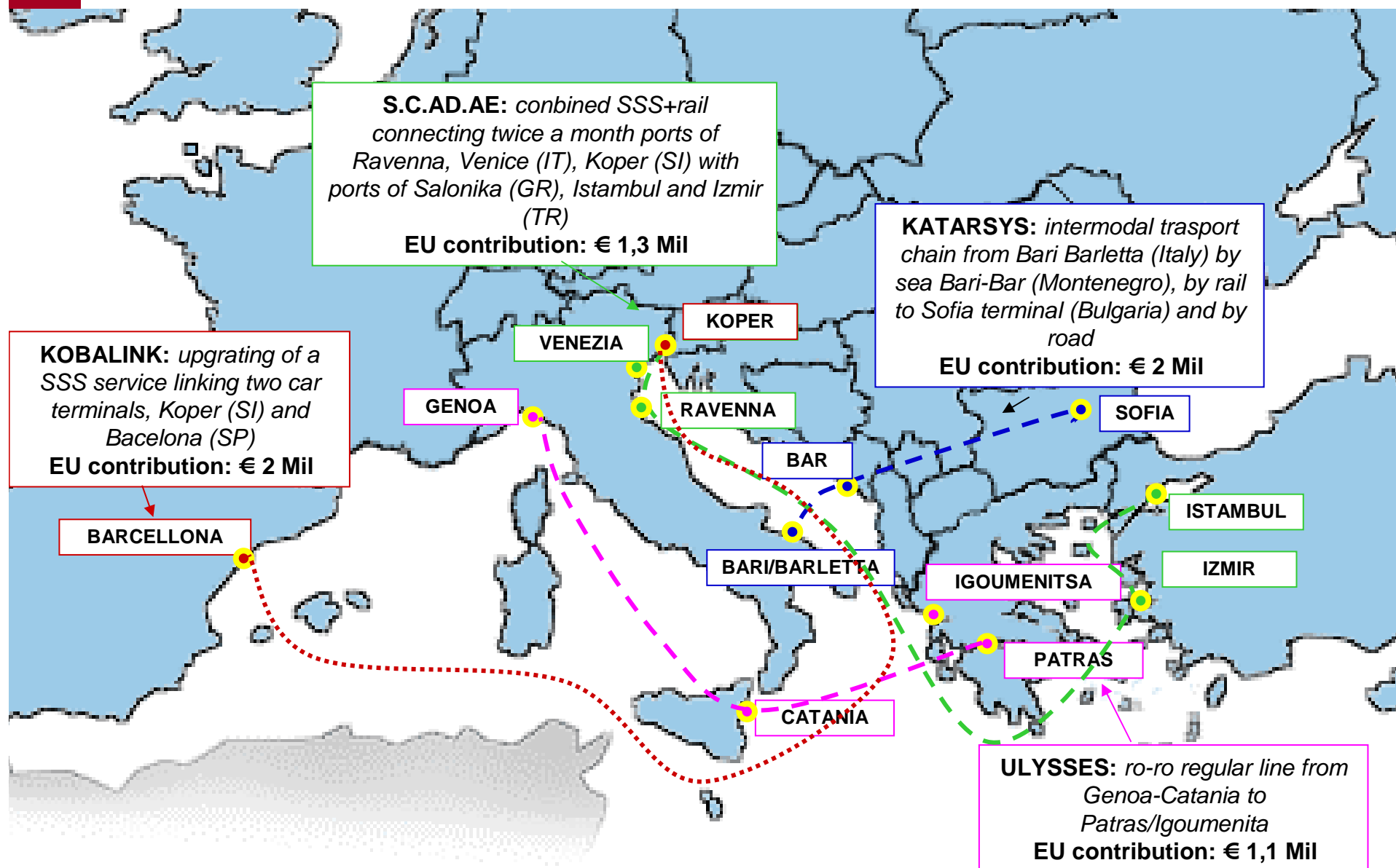
- **UNIQUENESS** – only 1 action type!
- **TRANSPORT SERVICES** – Should involve transport service or logistic concept) (no infrastructure, research or study projects)
- **EUROPEAN DIMENSION** – Undertaking. Single undertaking/consortium established in any EU MS or Norway, Iceland, Liechtenstein, Croatia?
....."An undertaking from a close third country may also be involved as an associated partner (not as a lead partner) to a project. Actions shall involve the territory of at least two Member States or the territory of at least one Member State and the territory of a close third country"
Close third country – means any country not a member of a European Union with a common border with the European Union or with a coastline on a closed or semiclosed sea neighbouring the European Union
- **EUROPEAN DIMENSION COST**: will budget finance costs arising only on EU territories or fully participating countries?
- **TIPE of LEGAL ENTITY**: are all project participants legal persons and privately/publicly owned commercial unertakings?
- **START UP of ACTION**: will action start between.....?

SPECIFIC ELEGIBLE CRITERIA FOR MODAL SHIFT ACTIONS

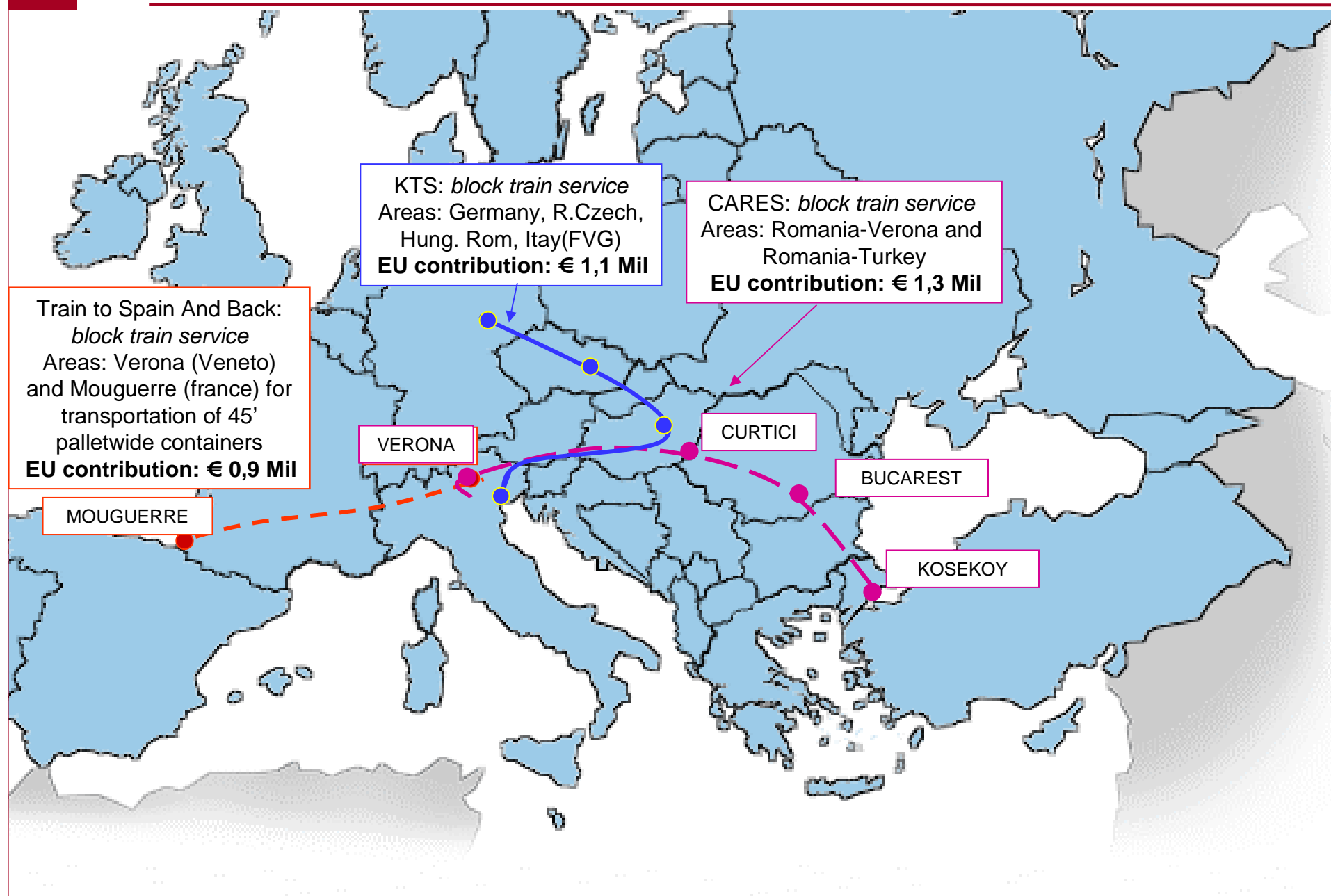
	MOD	CAT	MoS	TAV	CLA
Route	European Dimension (+ use of “Category A” ports for MoS)				n/a
Duration	Max. 36	36 to 60			Max. 24
Threshold (tkm <u>per year</u>)	60m (13 for IWW)	30m	200m	80m (or 4m vkm)	min. €250,000



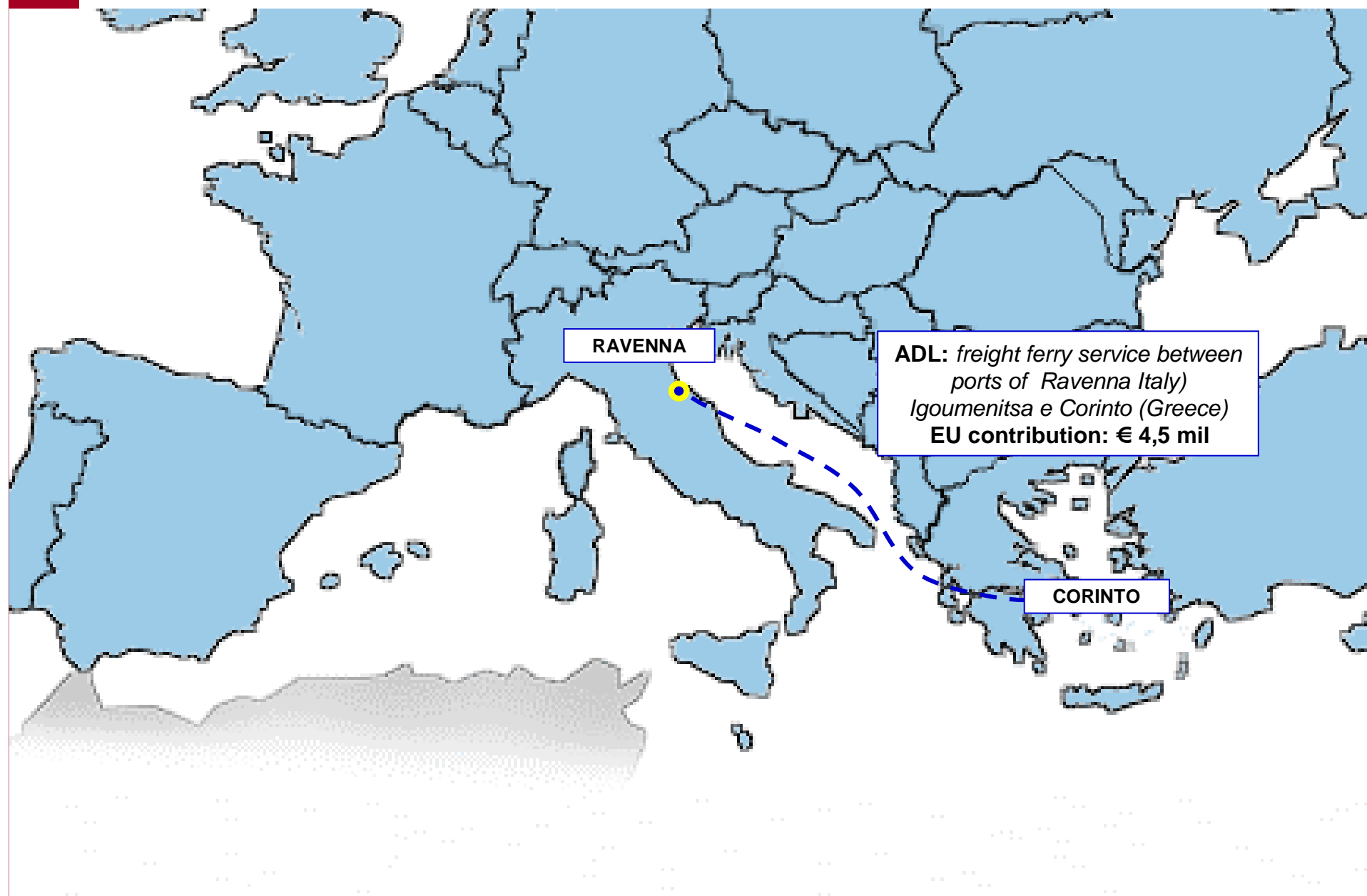
2008 - FINANCED PROJECTS A-I : SHIPPING...



2008 - FINANCED PROJECTS A-I : RAIL...



2009 - FINANCED PROJECTS A-I : SHIPPING...



2010 - FINANCED PROJECTS A-I : COMMON LEARNING ACTIONS

NO-ONE OF THE PROJECTS IN THE "MODAL SHIFT ACTION" CATEGORY IS SPONSORED INTO THE ADRIATIC AND IONIAN BASIN

SYNTHESIS

The aim of the proposed action is to develop "Learning Networks" providing innovative training courses "On Board" and "On Site" for cooperation, discussion and knowledge sharing to disseminate methodological tools and best practises which would enhance intermodal transportation and logistics procedures in the Adriatic Sea and East Mediterranean.

• **ANEK LINES sa (GR)**

DIASTASI- TRAINING AND CONSULTING SERVICES sa (GR)

• BPM- BUSINESS AND PROJECT MANAGEMENT sa (GR)

• INTERPORTO MARCHE SpA (IT)

• Port Authority of Ancona (IT)

€ 396.000

X-Posse

The aim of the proposed project is to promote green logistics alternatives through focused training actions on sea-river, searail and marketing of these services.

Hamburg School of Business Administration (HSBA) (DE)

• I3 Group eeg: Innovative Integrated Ideas (BE)

• ShipCon (CY)

• Innovamar (ES)

• CTL: Centro di Ricerca de "La Sapienza" per il Trasporto e la logistica (IT)

• Port of Gijon (ES)

• CFLI (Port of Venice) (IT)

• El Victor (GR)

• MARI (Maritime Association for Research and Innovation) (IT)

• CYMEPA (Cyprus Marine Environment Protection Ass.) (CY)

€ 491.000

● CONCLUSIONS



MARITIME TRAFFIC: CRUISES AND FERRIES

- In 2010, the traffic of passengers in the international (Adriatic – Ionian) links has got too differed results, in relations with the variety of markets.
- The positive performance of cruise traffic goes on and signs +12% than in the year before. Thanks to this trend Venice becomes the first maritime port in Adriatic – Ionian area for the international movements.
- Performances of Croatia are excellent, especially linked with Italy. Religious tourism flanks traditional touristic demand (regarding the sea).
- The markets from/to Greece are suffering: -2% passengers; -6.5% trucks / trailer. Greek crisis is going on and has got its effects also in 2010.
- Also the markets from/to Albania came to a standstill after some years of growth. In addition, the international traffics with Montenegro have been reducing.

MARITIME TRAFFIC: GOODS

- The 2010 year signed a strong recovery of container traffic in the world. Every main maritime port of the world (almost totally coming from Asia) has widely recovered the 2009 deficit.
- The pick up is not so marked in Europe. Italy grows at 3% and has got a slow development according to a controlled economic recovery.
- What's noteworthy in the Adriatic – Ionian basin is Koper' s bounce ahead (It has become the first Adriatic maritime port) and the recovery of Ancona, Rijeka, Trieste and Venice.

MARITIME TRAFFIC: PROSPETTIVE DELLO SSS

- East Mediterranean area (included also North Africa) is the new frontier for the development of the services of Short Sea Shipping from/to Adriatic – Ionian ports.
- Some countries (such as Turkey, Israel, Egypt) have got high potentialities (GDP growth, infrastructures and international opening).
- Some subsidies for the development of these services can come from Europe, too, thanks to Marco Polo II Programme (its announcement 2011 is expected to the latter session of the year).
- **The real match for the Adriatic ports still regards the links with hinterlands and with rich consumer basins of North Europe Centre. At this point, the iron – sea intermodal services are essentials.**



Thank you

Ida Simonella

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