



**Ports and Shipping:
Strategic Drivers
for Albania and Italy**

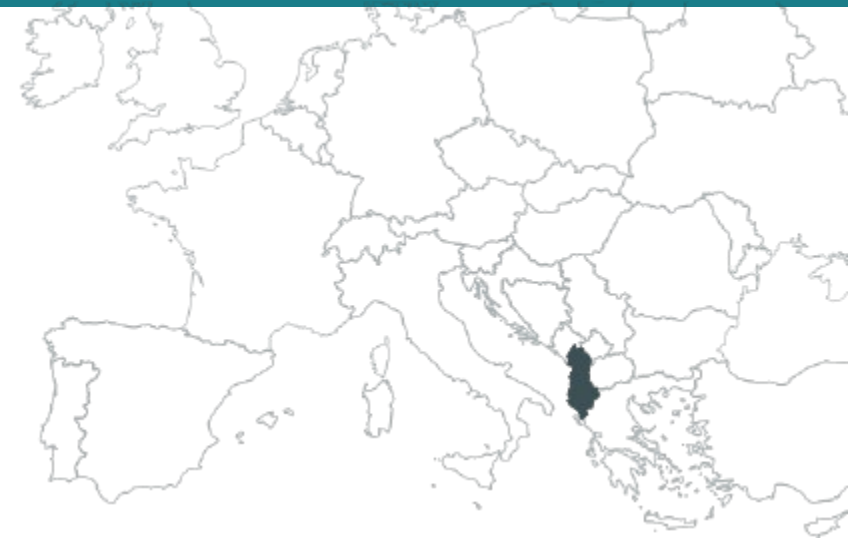
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Research Center related to Intesa Sanpaolo Banking Group

Tirana, 9th April 2025

Purpose and Organisation of the Study

This study was made by Intesa Sanpaolo Bank Albania and SRM



Part One Albania's port network structure and competitive position

Part Two Albania's maritime relations with Italy

1 Why is the Mediterranean essential both for global trade and the shipping industry?

2 The growing role of the East Mediterranean

- The Adriatic Sea as a gateway
- The rising relevance of Albania

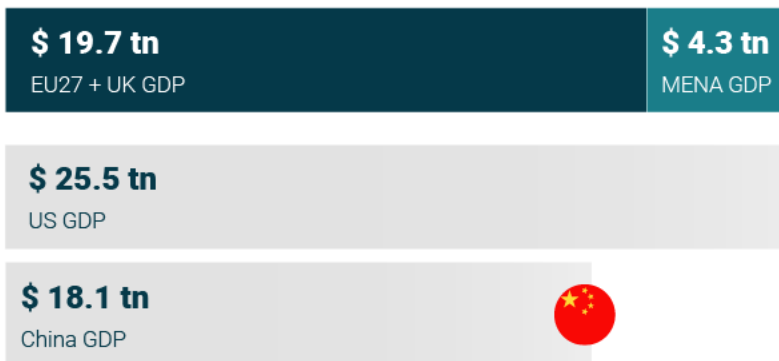
3 Albania's ports traffic, competitive position and trade relations



1 Why is the Mediterranean essential both for global trade and the shipping industry?

The Mediterranean is the cornerstone of the world economy

The Mediterranean is at the centre of an area worth **\$ 24 tn** of total GDP, almost as **much as the USA** and **more than China**.



Source: SRM on various data

The key numbers of the Mediterranean



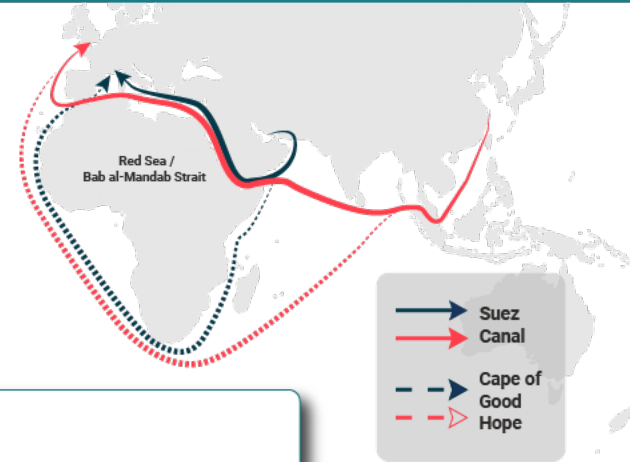
TOP 10 container ports of the Mediterranean + Adriatic ports



Source: SRM on Eurostat, Port and Canal Authority, ISTAT, Port Authorities

1 Why is the Mediterranean essential both for global trade and the shipping industry?

Suez and the Red Sea: despite the impact on the shipping routes, the forecast of the Med container traffic is positive



Average Suez transits 2024 on 2023 average

-70%
in GT terms

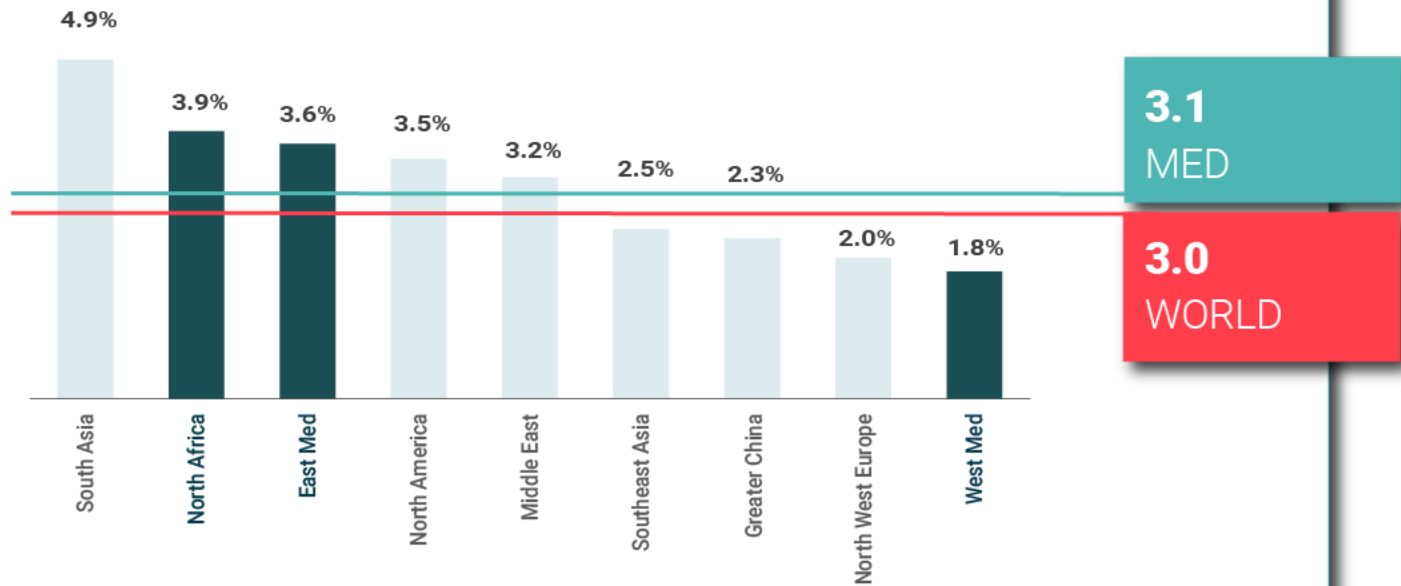
Containership
Car carriers, Cruise ships, LNG carriers

-90%
or more

Bulkers
Tankers

-50%

Average annual growth 2024-2029 container traffic



The Adriatic Sea as a gateway. It supports the Balkans and Central Europe with its maritime and energy infrastructures

The Adriatic Sea includes 6 countries:
Albania, Bosnia and Herzegovina, Croatia,
Italy, Montenegro, Slovenia.

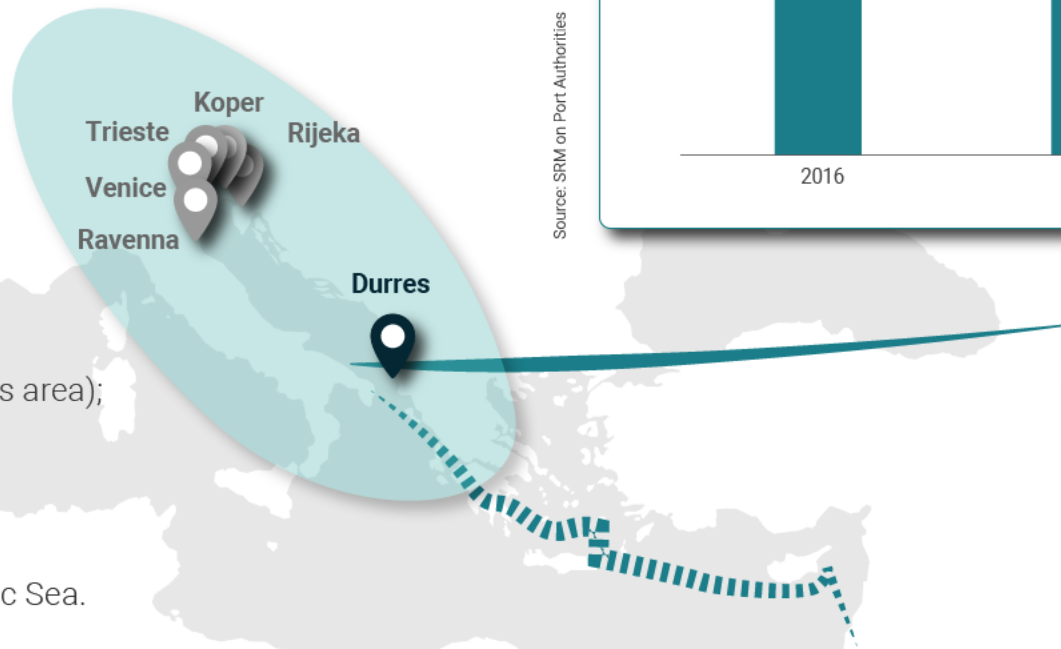
GDP: \$2,511 bn

14% on EU GDP

Source: SRM on IMF

ENERGY

The East Med is rich of natural gas (ENI is exploring this area);
EastMed Pipeline (Poseidon) is under construction to
connect this area with Italy and Europe;
TAP (Trans Adriatic Pipeline) is a gas pipeline from
Azerbaijan to Italy, crossing Greece, Albania and Adriatic Sea.

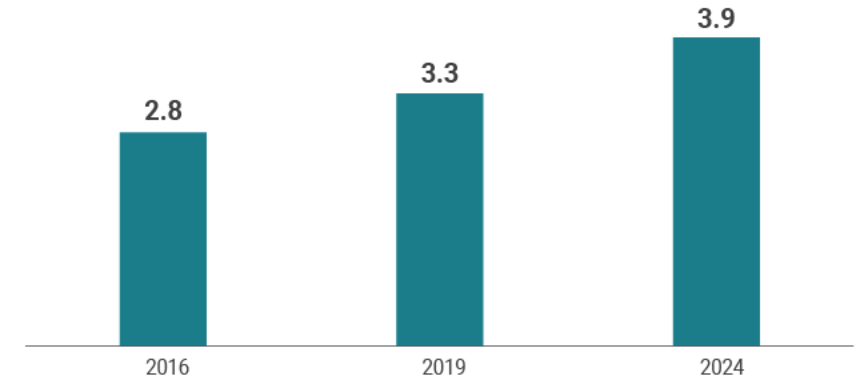


Source: SRM on Port Authorities

PORTS

In the Adriatic Sea there are many important ports
handling cargo that is crucial for the countries' economy.

The Adriatic Sea. Container throughput (mln TEUs)



The Adriatic Sea is a strategic geopolitical crossroads and it has got a regional integration role



Industry Supply Chains Reorganization



Reshaping relations in the Area, following the regionalization of the globalization.

Ports, Logistics, Tourism and Maritime Economy



A strategic sector for all these countries.

Energy Sector crucial for all Mediterranean Strategies



The Adriatic Sea is a strategic energy corridor to Central Europe.

Italy and Albania could play a crucial role.

The Adriatic space could:

Provide Italy with a gateway to major continental European regions, such as the Danube and the Baltic.

Be a front door to the Mediterranean.



Albania's main economic figures at a glance

Economy and foreign trade

GDP at current price **\$25.4 bn**

36.9%

GDP growth
2014-2024

3.2%

GDP growth
2014-2024
annual average

3.5%

GDP growth
2025-2029
annual average

\$16,477

GDP
per capita
PPP

\$19,889

GDP
per capita in 2029
PPP | EXP

€12.6 bn
Foreign trade
in 2024

33.7%
Foreign trade
change on 2019

**around €11 bn
of foreign trade
is by sea**



The Maritime & Logistic Sector

Cargo handled by total ports in 2024
7.7 m tonnes



93.4%

share of total transport

90.6%

change on 2014

6.7%

annual growth 2014-2024

11 projects in the TEN-T Corridors context for a total value of €1 bn.

6

road projects

2

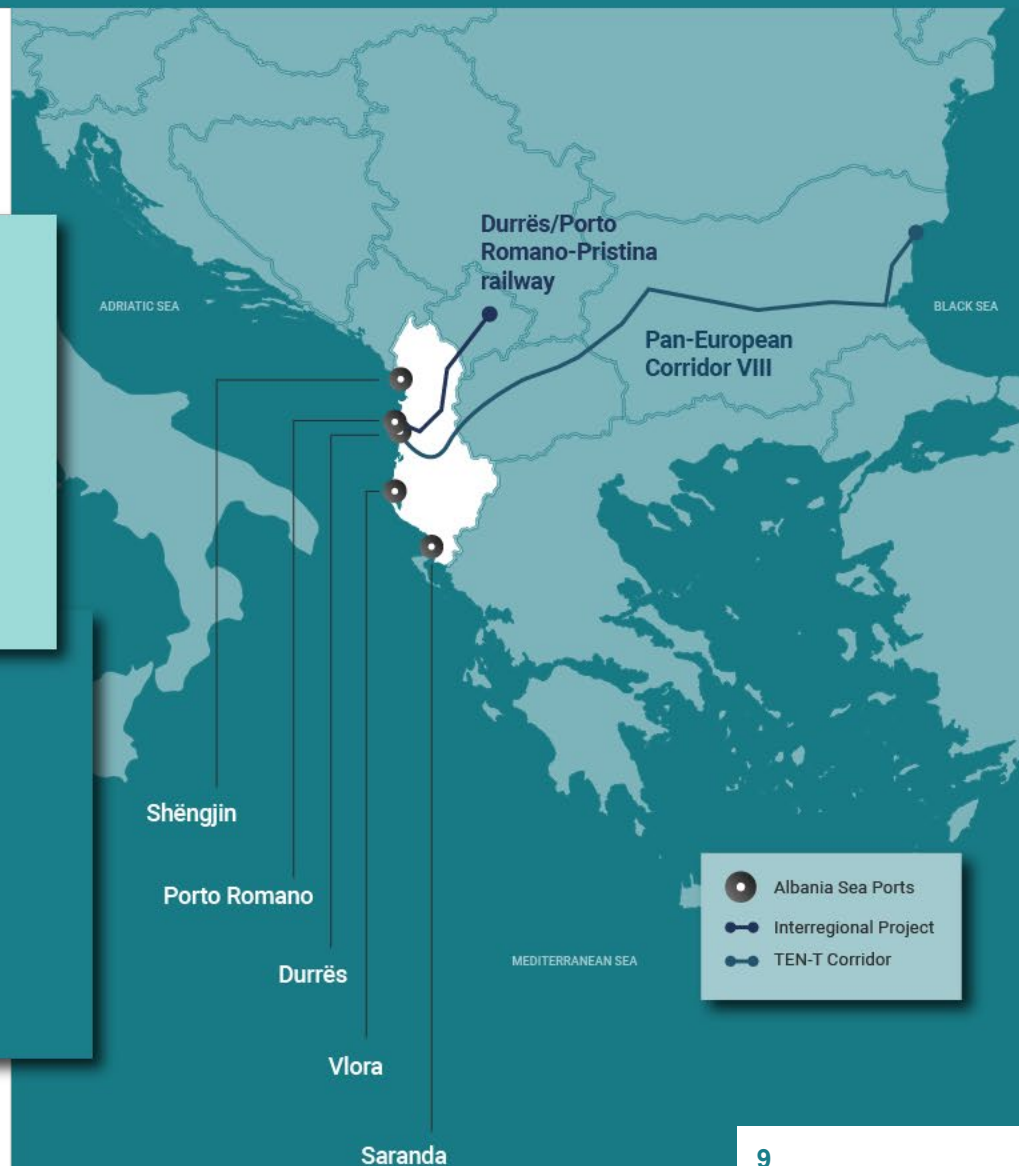
rail projects

2

maritime projects

1

air projects



Source: SRM on INSTAT



The main maritime European partners

Ports and type of cargo

ITALY: Main ports: Bari, Ancona, and Gioia Tauro.
Primary categories: Liquid bulk and Ro-Ro.

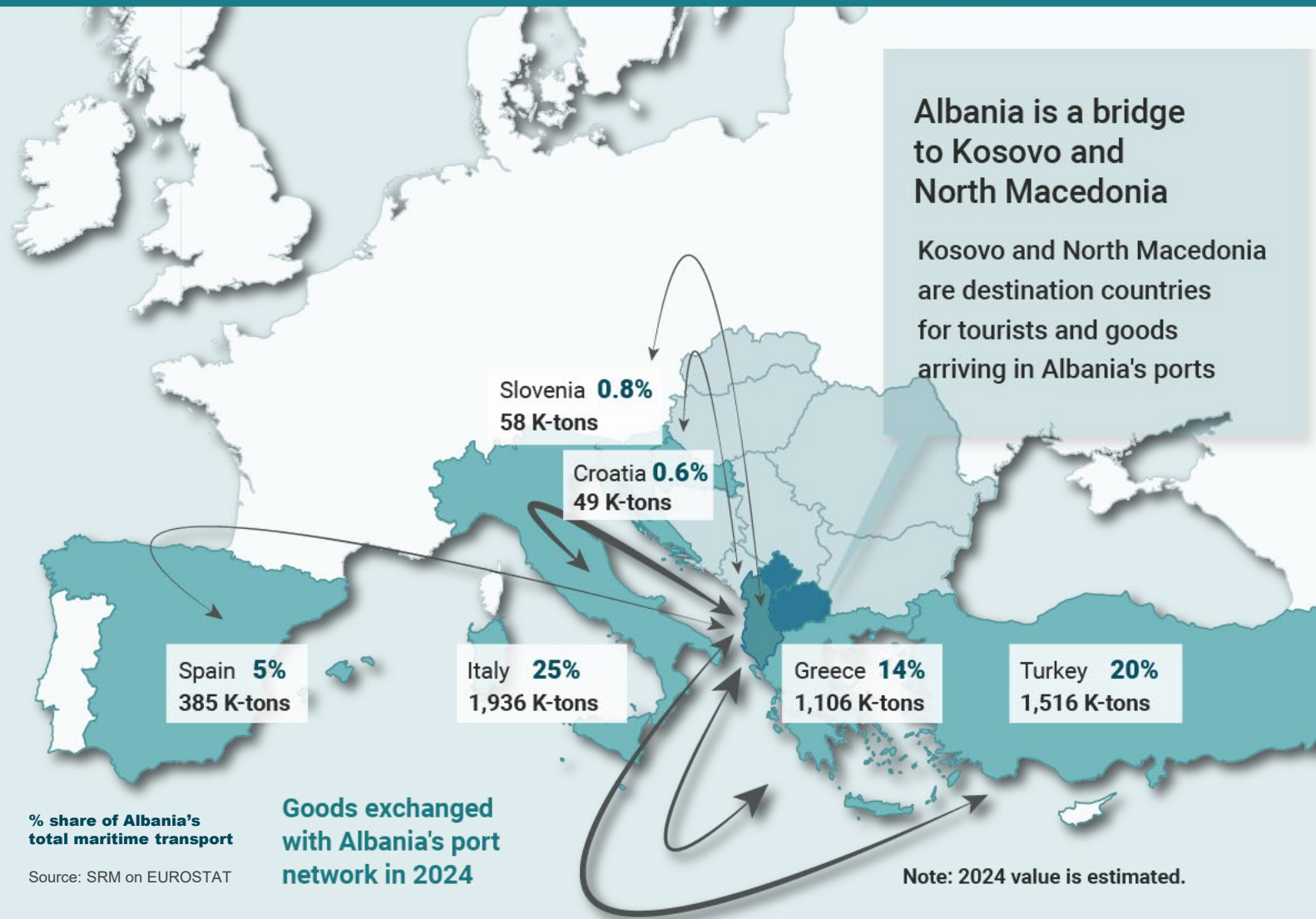
TURKEY: Main ports: Aliaga, Izmit, and Izmir
Primary category: Dry bulk.

GREECE: Main port: Piraeus.
Primary category: Container.

SPAIN: Main ports: Tarragona and Barcelona
Primary category: Liquid bulk.

SLOVENIA: Main port: Koper.
Primary category: Liquid bulk.

CROATIA: Main ports: Bakar and Ploce.
Primary category: Liquid bulk.



% share of Albania's total maritime transport
Source: SRM on EUROSTAT

Goods exchanged with Albania's port network in 2024



Main cargo transported and ports traffic

Oil products, Metal products and Non metallic products are **main cargo** transported by sea in Albania.

Q4 2024

Oil products

26%

527.4 k-tons

Metal products

18%

359.4 k-tons

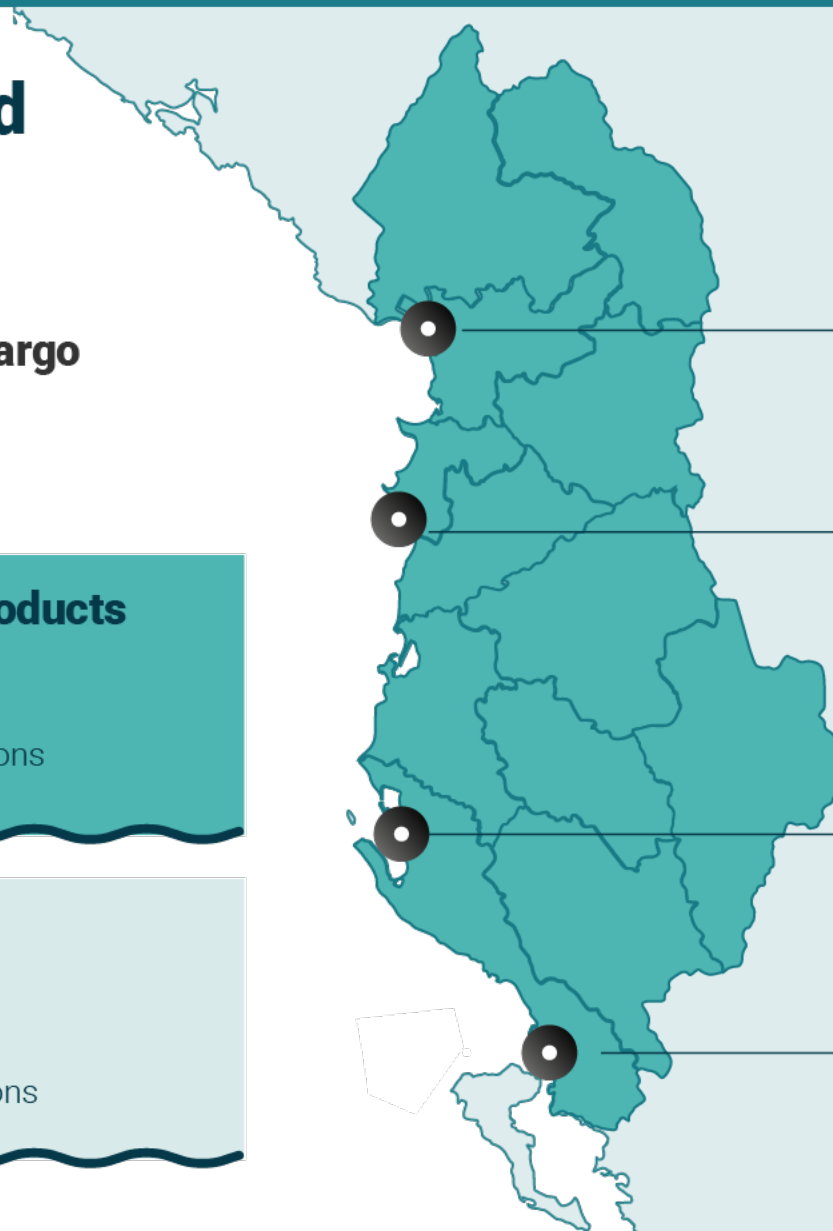
Non metallic products 13%

253.2 k-tons

Others

43%

868.2 k-tons



Total ports traffic

7,748 K-Tons

	2024	share	change on 2022
Port of Shëngjin	182	2.3%	21.3%
Port of Durrës	7,354	95%	14.5%
Port of Vlora	179	2.3%	37.7%
Port of Saranda	34	0.4%	-41.4%

Source: SRM on INSTAT



Italy-Albania port network relations

Italy's first, with about **1.9 million of tons** exchanged with Albania's port network

Port of Venice

7%

Port of Ortona

5%

Porto Foxi

9%



Port of Ancona

19%

Port of Bari

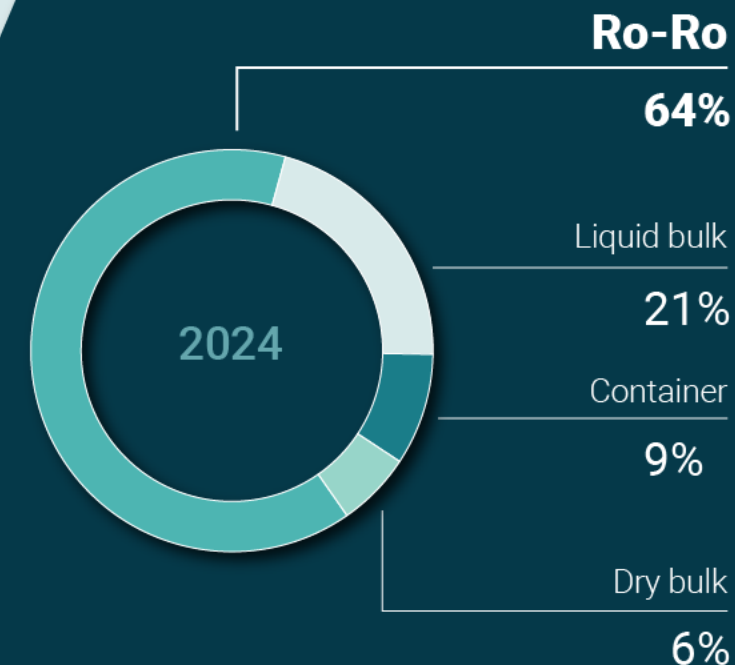
41%

Port of Gioia Tauro

7%

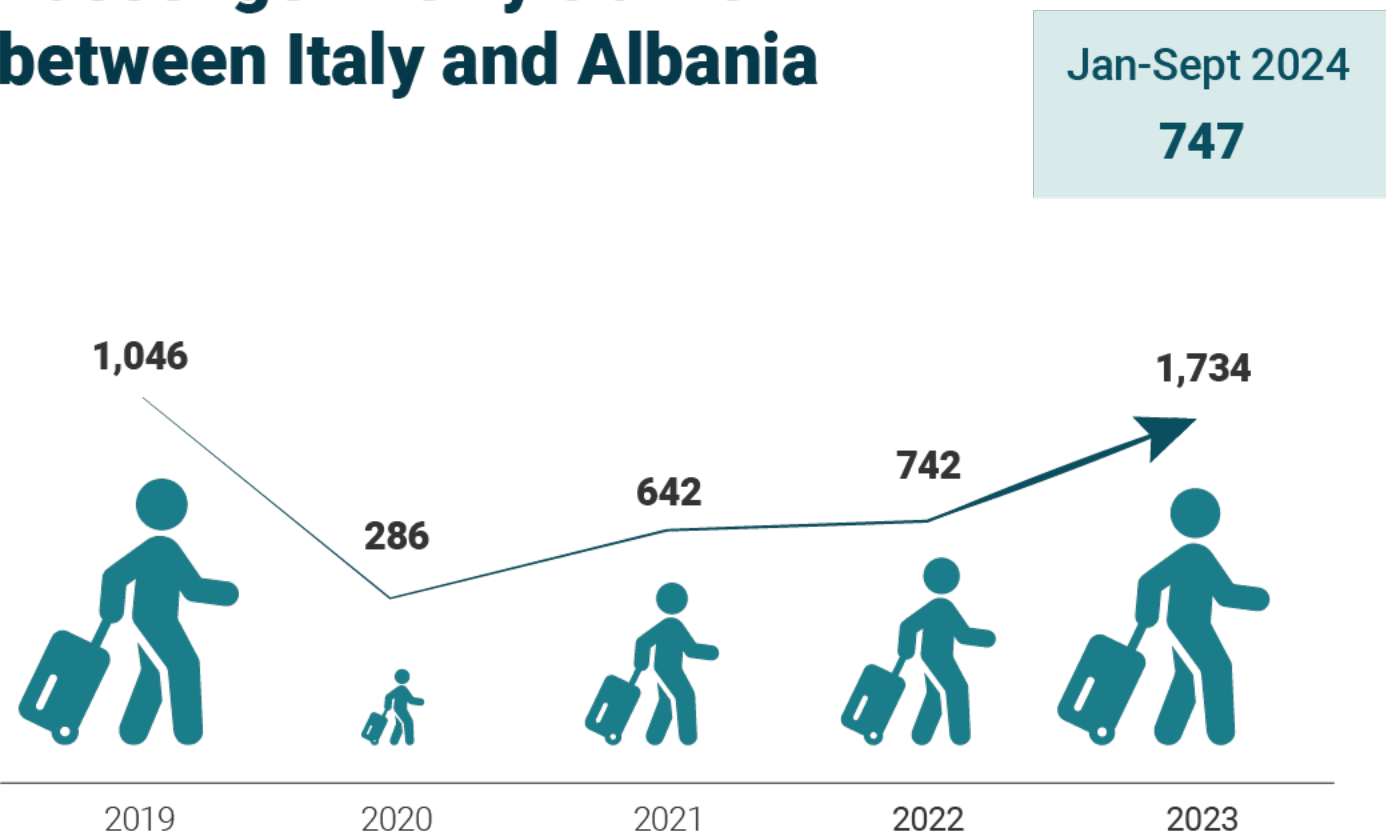
Breakdown by port 2024

Breakdown by category 2024

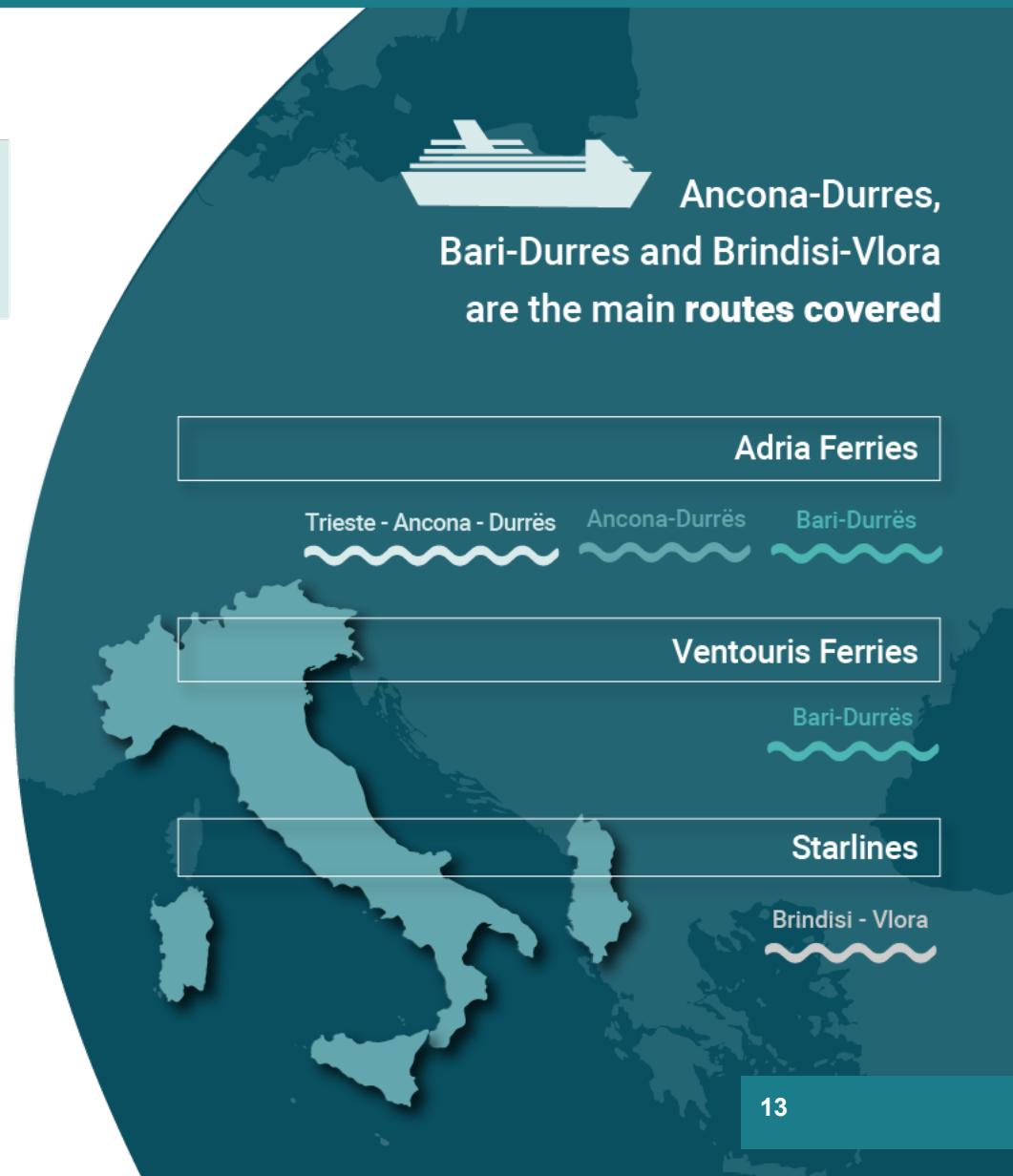




Passenger-Ferry traffic between Italy and Albania



Source: SRM on Eurostat | **Thousand Passengers**



3 Albania's ports traffic, competitive position and trade relations A Focus on Durres Port



Durres makes up 95% of Albania's throughput.

7,354 K-Tons



18%
EXPORTS
1,345 K-Tons

82%
IMPORTS
6,009 K-Tons

The traffic includes prevalently inwards goods.





Durres Calls were about 1,693 in 2024.

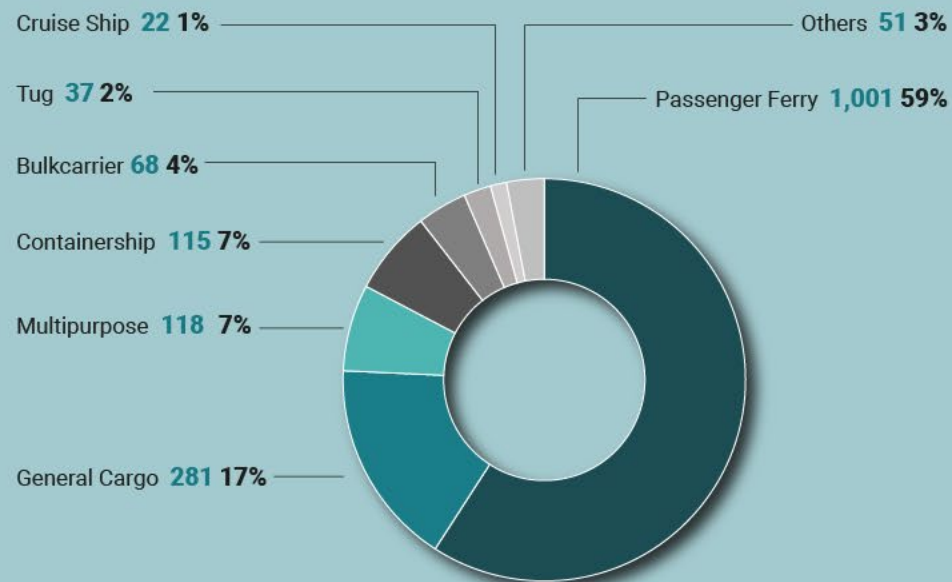
Passenger Ferry (59%) is the main category followed by General Cargo (17%), Multipurpose and Containership (both 7%).

Durrës port calls by year



Source: SRM on Clarksons

Vessel calls in the port of Durrës in 2024: sectorial breakdown



Source: SRM on Clarksons



Durres hub-port project: a look into the future

Porto Romano will become the main commercial port

€390 million

Durres will be transformed into a tourist port

€2 billion

Durres Yacht & Marina project

- **400 hectares** area.
- A **new container terminal** with three times the capacity of the current one.
- An **Economic Free Zone**: a 60-hectare logistics park linked to the port by a four-kilometre railway.
- A **16-metre-deep canal** for the construction of large ships.

IMPACT

2 million containers per year

50 million tonnes of goods

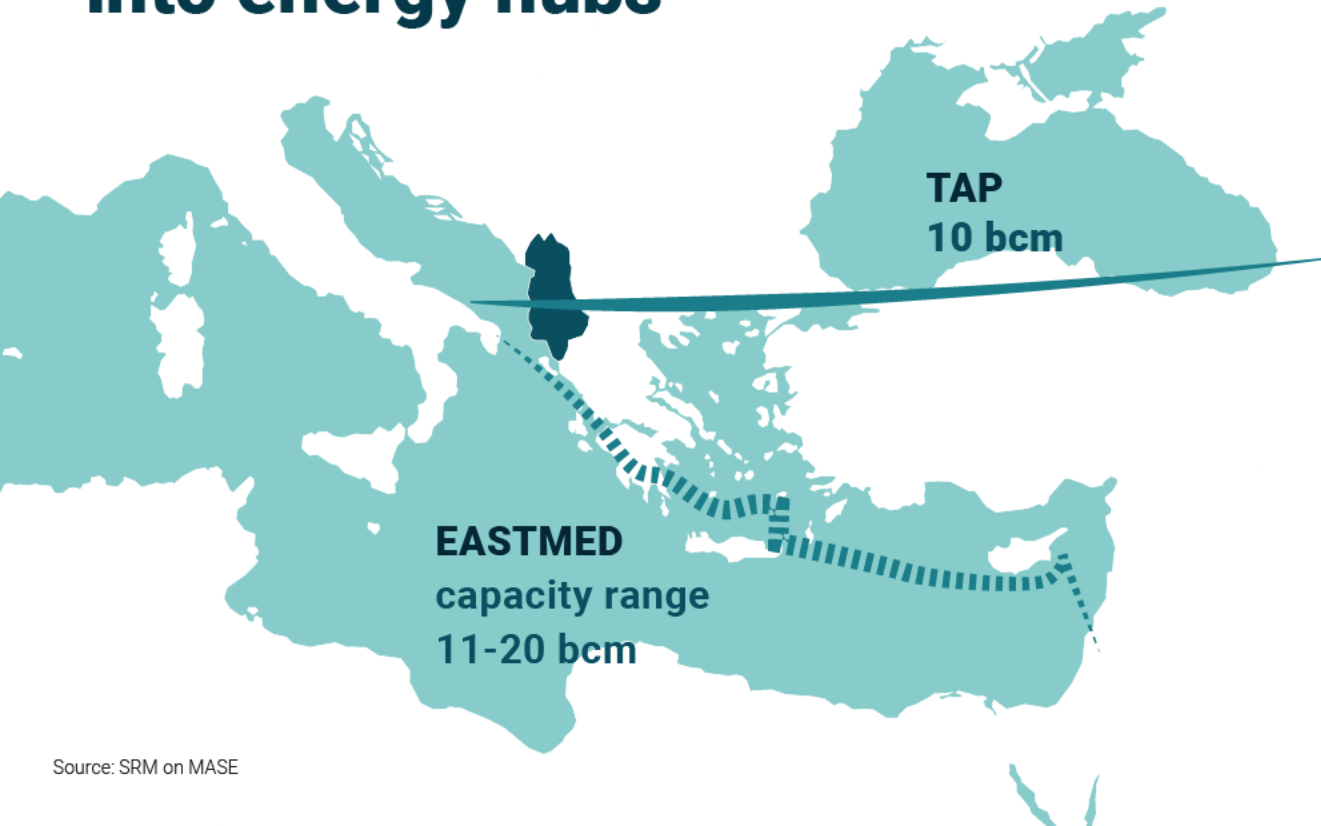
1 million passengers

Between +1.2% and +1.8% of GDP

The project is the result of **cooperation between** the governments of **Albania, North Macedonia and Kosovo**, and includes the construction of **2 dry ports** in Pristina (Kosovo) and Struga (North Macedonia), connected to the **Durres-Pristina railway**.



Ports are not only logistics nodes... They are evolving into energy hubs



Ports are:

- Crucial infrastructure for regulating the functioning of the energy market;
- Entrance points of oil & gas pipelines;
- Energy gateways; Oil and Chemical need to be converted into biofuel and biochemical.
- **Energy communities:** they facilitate the energy transition process of shipping and logistics;
- **Alternative fuels bunkering points** to boost green shipping.

Durres is moving towards this direction:

Action Plan for a Sustainable and Low-carbon Port

- Revitalisation of **green areas**
- A **recycling plan** for a sustainable port
- A **Mobility plan** for Durres Port employees
- Investment in **clean energy** (renewable)

The recent strategic pact between **Italy, Albania, and the United Arab Emirates**, signed on **January 15, 2025**, aims to produce renewable energy in Albania and share it with its two partners.



Thank you for your attention

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