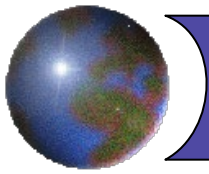


Turchia, Nord Africa, Black Sea:

il rapporto tra l'attuale situazione politico-economica e le possibili conseguenze sui traffici marittimi nel Mediterraneo

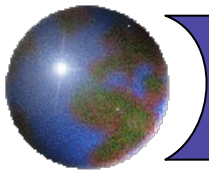
Napoli Shipping Week
4 Ottobre 2024

Sabrina Falceri
Business Head
Settore Mediterraneo
Evergreen Line



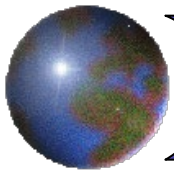
INTRAMED in pillole

- ✦ ***Rotte brevi***
- ✦ ***Esigenza transit times veloci (preferenza per servizi diretti)***
- ✦ ***Mercato frammentato***
- ✦ ***Flussi sbilanciati tra import ed export e per container type***



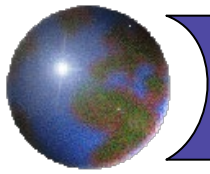
INTRAMED in pillole

- ✦ ***Navi piccole (stazza media 400-1000 teus fino max 2800 teus)***
- ✦ ***Utilizzo navi Ro/RO***
- ✦ ***Utilizzo tratte inter-coastal su mainliners oceanici: verso una riduzione della capacità dopo la crisi di Suez?***
- ✦ ***Sempre di più Door to Door packages***



INTRAMED: quali sfide?

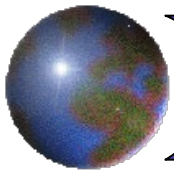
- ❖ ***Instabilità politica: non più una variabile ma una costante?***
- ❖ ***Dalla "globalization" alla "slowbalization" ed alla "newbalization"***
- ❖ ***La virata protezionistica e le restrizioni commerciali: corsi e ricorsi storici?***
- ❖ ***Re-shoring e **near-shoring**: trend destinato a durare?***



INTRAMED: quali sfide?

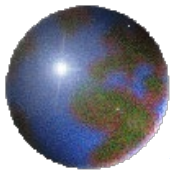
➤ Le opportunità del *nearshoring*:

- ***Riduzione rischi fornitura***
- ***Costi di trasporto inferiori***
- ***Gestione logistica più semplice***
- ***Miglioramento immagine aziendale***
- ***Comunicazione più semplice ed immediata con i partners (friend-shoring)***



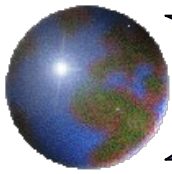
INTRAMED: quali sfide?

- ❖ ***Ipotizzabile un backshoring o un further offshoring?***
- ❖ ***La terza via: tra globalizzazione eccessiva e l'impossibile autarchia?***
- ❖ ***Green Deal: un vero affare?***
- ❖ ***Crescente congestionamento dei porti: il logistic bottleneck***



GREEN DEAL: Normative per riduzione GHG

YEAR		2023	2024	2025	2026	2027	2028	2029	2030
IMO		EEXI							
	CII baseline set 2019	CII -5%	CII -7%	CII -9%	CII-11%	New CII formula			
EU	ETS Maritimes		ETS 40%	ETS 70%	ETS 100%				
	Fuel EU			Fuel EU					
	ETS2					ETS2			
	EUA			EUA					
	CBAM				CBAM				
	CSRD	Oct 17 2023							
	CSDDD								
	EFRAG								
	TEN-T								
US	California Shipping Act	HR8336 2022	baseline				-20%		-45%
	Clean Competition Act	HR4024 2023							
	International Maritime Pollution Accountability Act of 2023 S1920								
	US DOT blueprint for transportation decarbonization								
	FMC OSRA2 HR 1696								
	Calf SB253 Climate Corporate Data Accountability Act								
	Calf SB261 climate-related financial risk								
China	ETS					CN ETS			
Global			IFRS IASB ISSB						
Taiwan	FSC The Financial Supervisory Commission	CSR report GRI standard SASB standard TCFD	CSR report Inline with Annual report IFRS IASB ISSB S1S2						



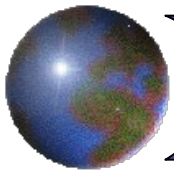
IL caso EGITTO

Year	Export to MED In TEU	Growth %
2021	310.944	
2022	321.782	+ 3%
2023	410.797	+ 28%
2024 (forecast)	527.472	+ 28%

Year	Import fm MED in TEU	Growth %
2021	229.635	
2022	199.096	- 13%
2023	161.444	- 19%
2024 (forecast)	172.928	+7 %

EG ports: Alexandria, Port Said, Damietta

Source: CTS data



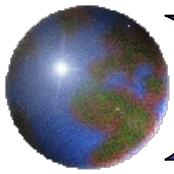
IL caso Turchia

Year	Export to MED in TEU	Growth %
2021	1.106.618	
2022	1.025.819	- 7%
2023	952.870	- 7%
2024 (forecast)	965.208	+ 1%

Year	Import fm MED in TEU	Growth %
2021	419.512	
2022	399.040	- 5%
2023	426.988	+ 7%
2024 (forecast)	483.110	+ 13%

TR Ports: Istanbul, Izmir, Gemlik, Mersin, Iskenderun

Source: CTS data



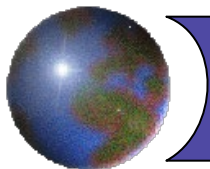
IL caso GRECIA

Year	Export to MED In TEU	Growth %
2021	119.761	
2022	118.734	- 1%
2023	124.554	+ 5%
2024 (forecast)	135.894	+ 9%

Year	Import fm MED in TEU	Growth %
2021	109.561	
2022	117.814	+ 7%
2023	119.040	+ 1%
2024 (forecast)	164.396	+ 38%

GR ports: Piraeus and Thessaloniki

Source: CTS data



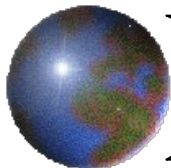
IL caso ROMANIA

Year	Export to MED In TEU	Growth %
2021	31.974	
2022	45.096	+ 41%
2023	38.455	- 15%
2024 (forecast)	49.996	+30 %

Year	Import fm MED in TEU	Growth %
2021	20.269	
2022	27.064	+ 34%
2023	25.173	- 7%
2024 (forecast)	27.928	+ 11%

Since February 2022, RO volumes include as well some volumes to/fm UA

Source: CTS data



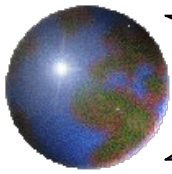
IL caso BULGARIA

Year	Export To MED In TEU	Growth %
2021	11.092	
2022	13.800	+ 24%
2023	12.521	- 9%
2024 (forecast)	16.452	+ 31%

Year	Import fm MED in TEU	Growth %
2021	8.695	
2022	8.261	- 5%
2023	7.291	- 12%
2024 (forecast)	10.402	+ 43%

BG ports: Varna and Burgas

Source: CTS data



Grazie per l'attenzione