



Italy-Serbia trade and new green logistic models

Alessandro Panaro
Head of Maritime & Energy Dept., SRM

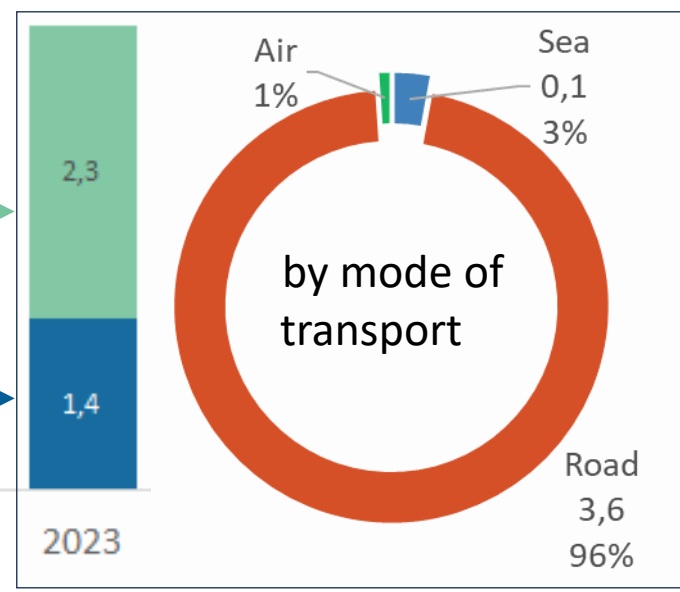
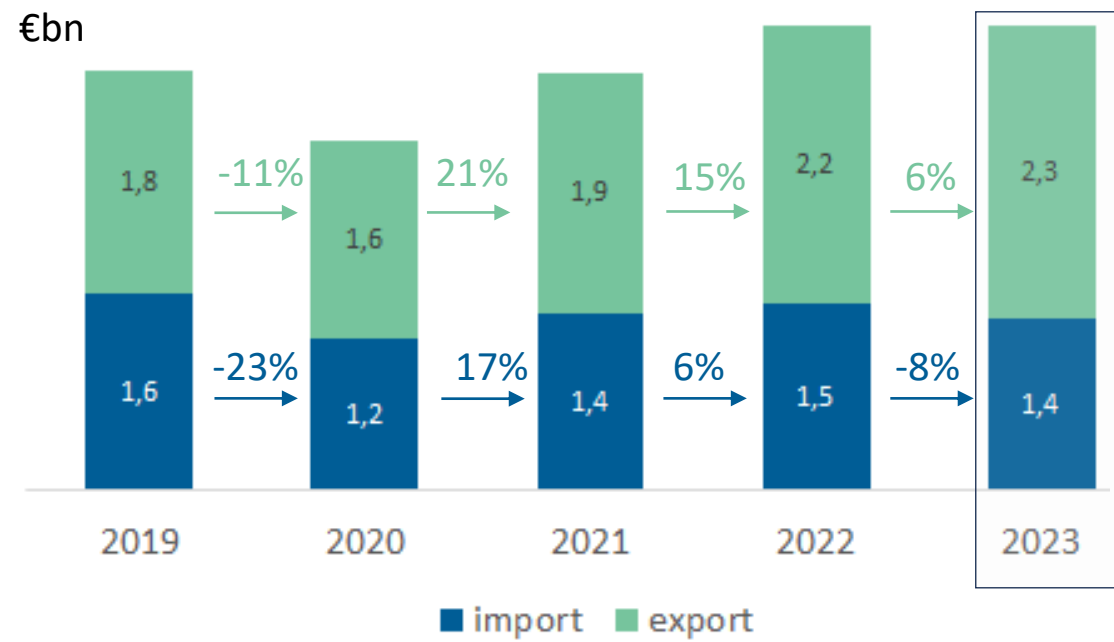
Belgrade, 10 July 2024

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- A map of Europe is shown in the background, with several colored horizontal bars overlaid on it. The bars are numbered 1 through 5 and contain text. The colors of the bars are: 1 (pink), 2 (orange), 3 (yellow), 4 (teal), and 5 (green).
- 1 Italy – Serbia trade
 - 2 Logistic efficiency
 - 3 New TEN-T Corridors
 - 4 Current scenario
 - 5 New drivers to compete




AGENDA

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Italy-Serbia trade: €3.7 billion



Italy 3 major import value: 54%

-  Textiles and clothing **32%**
-  Plastic and non-metallic ores **11%**
-  Metals **10%**

Italy 3 major export value: 50%

-  Textiles and clothing **19%**
-  Machinery **17%**
-  Metals **14%**

Logistic efficiency: key driver for competitiveness

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LPI Score

SERBIA	2,8	ITALY	3,7	GERMANY	4,3
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	Score, var. on 2018	SERBIA	ITALY	GERMANY
Customs	→	2,2 ▼	3,4 ▼	3,9 ▼
Infrastructure	→	2,4 ▼	3,8 ▼	4,3 ▼
International Shipments	→	2,9 ▼	3,4 ▼	3,7 ▼
Logistics competence	→	2,7 =	3,8 ▲	4,2 ▼
Tracking & Tracing	→	2,9 ▲	3,9 ▲	4,2 ▼
Timeliness	→	3,4 ▲	3,9 ▼	4,1 ▼

Ten-T corridors: the new reform (June 2024)

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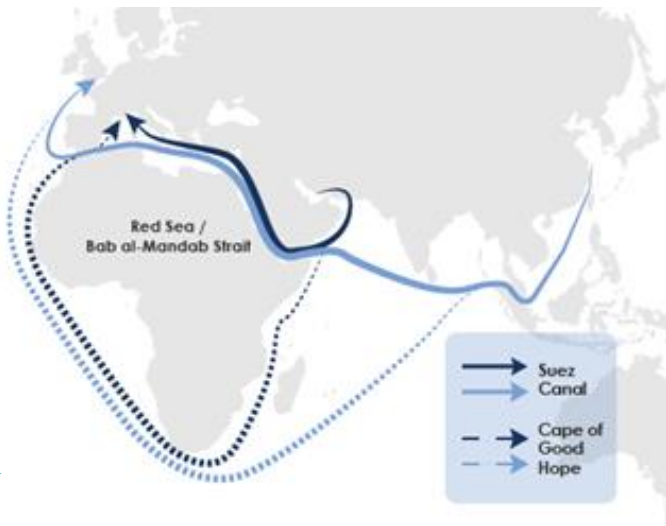
Source: European Commission **TENtec**



- ATLANTIC
- SCANDINAVIAN - MEDITERRANEAN
- MEDITERRANEAN
- NORTH SEA - RHINE - MEDITERRANEAN
- BALTIC SEA - ADRIATIC SEA
- WESTERN BALKANS - EASTERN MEDITERRANEAN
- NORTH SEA - BALTIC
- RHINE - DANUBE
- BALTIC SEA - BLACK SEA - AEGEAN SEA

Logistics is going through a complex time

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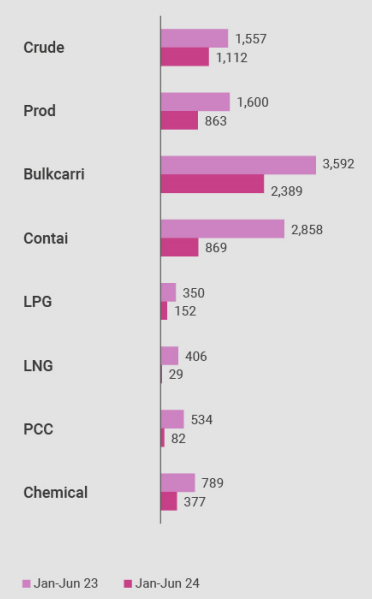


Impact of rerouting on the Cape of Good Hope
 on sailing distance, total sailing time and emissions for a typical weekly Asia-North Europe liner service.

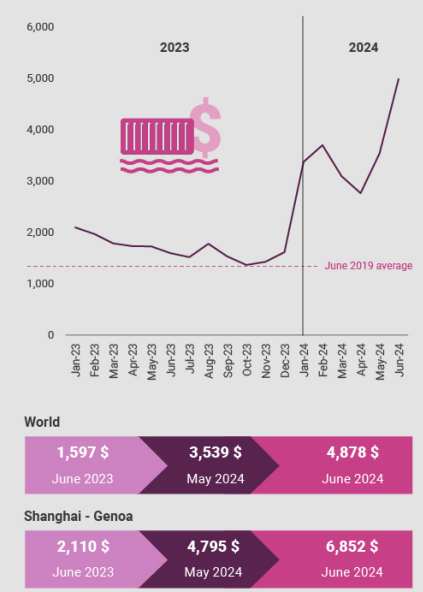
	Unit	Red Sea/ Suez route	Cape route	Increase (%)
Total roundvoyage sailing distance	nm	24000	31000	29.2
Average sailing speed	kn	16	17	6.3
Average total port time per call	days	1.7	1.7	
Number of Asian port calls	no.	5	5	
Number of North European port calls	no.	4	4	
Total sailing time	days	62.5	76.0	21.6
Total port time	days	15.3	15.3	
Total roundvoyage time	days	77.8	91.3	17.3
Required number of vessels for weekly service	no.	11	13	17.3

The Red Sea Crisis: its impact on the Mediterranean

Number of ships transiting from Suez



Drewry World Container Index (US\$/40ft)



Reliability of container liner services



Days of delay



More delays for companies on the Asia-Med route



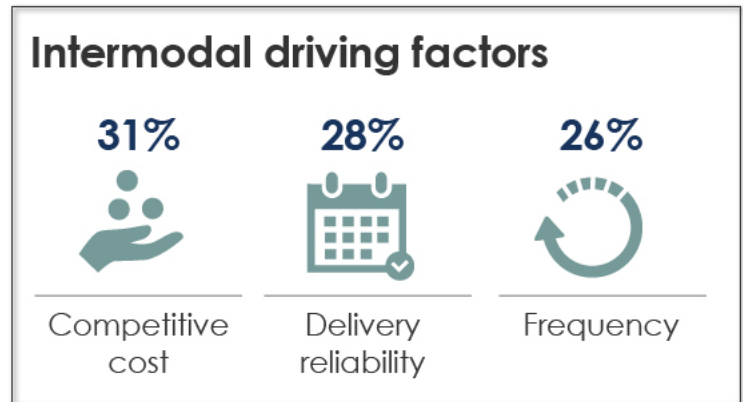
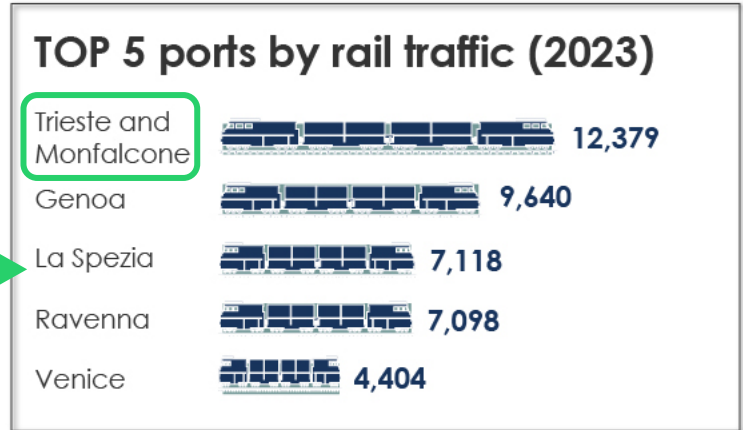
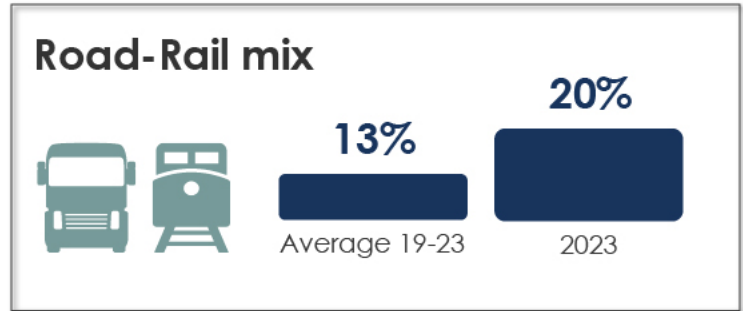
Changing strategies for companies

- Reorganisation of services
- Growth in transhipment
- Reduction of direct services

Source: SRM on various data



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The challenge of sustainability

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Average GHG emissions (gCO2 per tonne-Km), well-to-wheel, for freight transport in the EU-27

as a share of total GHG emissions in the EU-27

Other sectors*

71.5 %

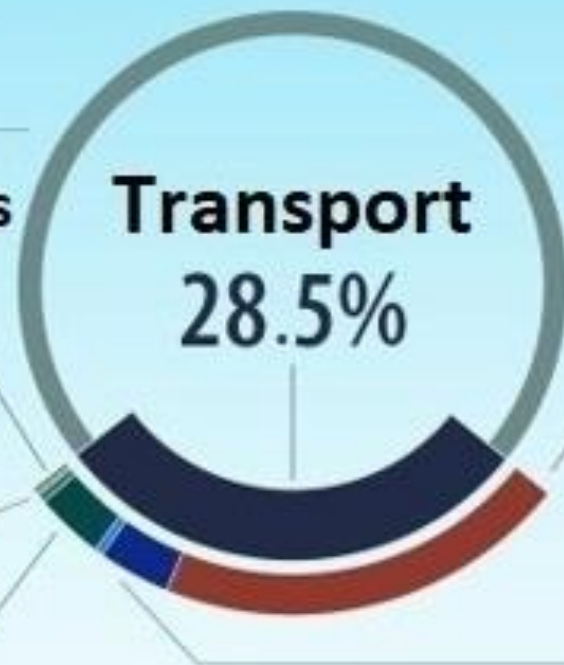
Other transports

0.1 %

Rail 0.1 %

Air

National	International
0.4 %	3.4 %



Road 20.5 %

Sea

National	International
0.4 %	3.6 %

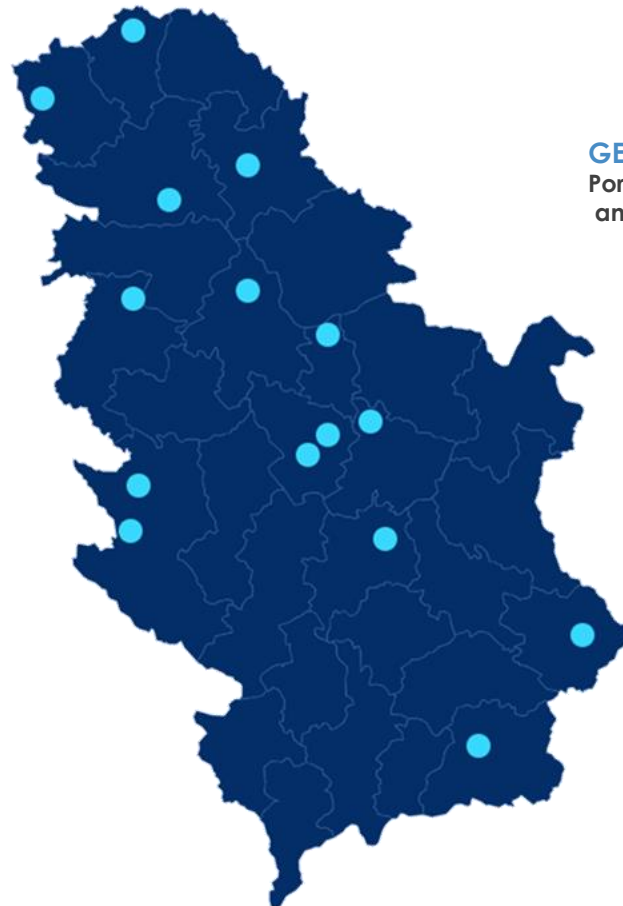
* Energy, manufacturing industries and construction , households, commerce, institutions, agriculture and others

Simplified Logistic Zones and Free Zones: one strategy for both countries

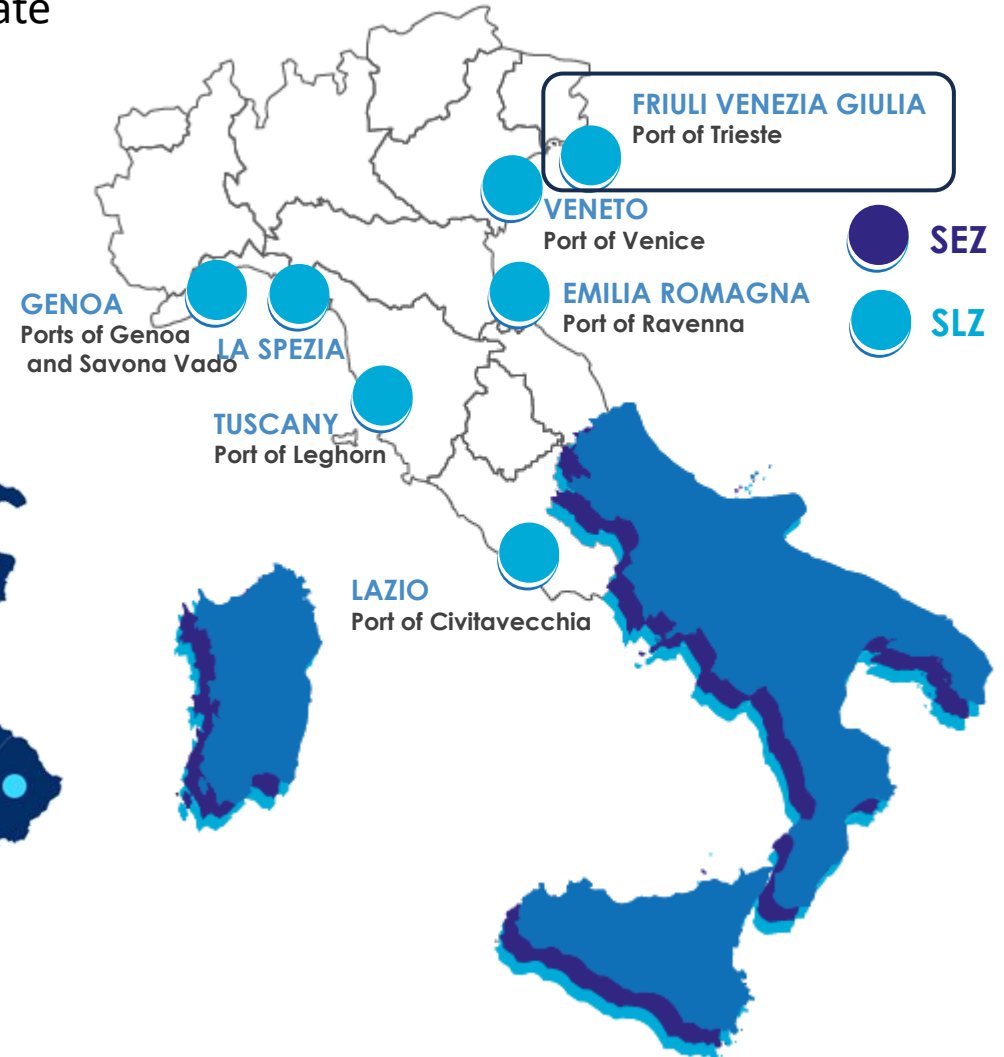
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Free Zones in the Republic of Serbia

More than 200 companies operate in 15 free trade zones.





Free Zones in Italy



Strategic role of ports of Trieste and Monfalcone as pivot for the development of Serbia's potential

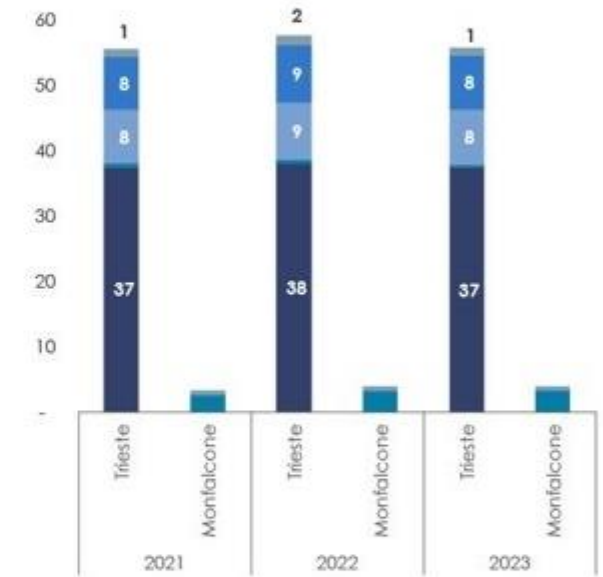
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			Italy
	Liquid bulk	37.3-1.4%	-1%
	Dry bulk	3.5 -7.8%	-15%
	Container	8.4 -3.9%	-3.6%
	Ro-Ro	8.5 -4.9%	+0.4%
	Other cargo	1.7 -17.8%	-5.4%

TOTAL THROUGHPUT 2023 59.5 -3.2% -3.2%

Jan - Apr 2024
3,045 trains

Trend cargo handled by Trieste and Monfalcone ports



■ Liquid bulk ■ Dry bulk
■ Container ■ Ro-Ro ■ Other cargo

Jan – May 2024
266,661 TEUs



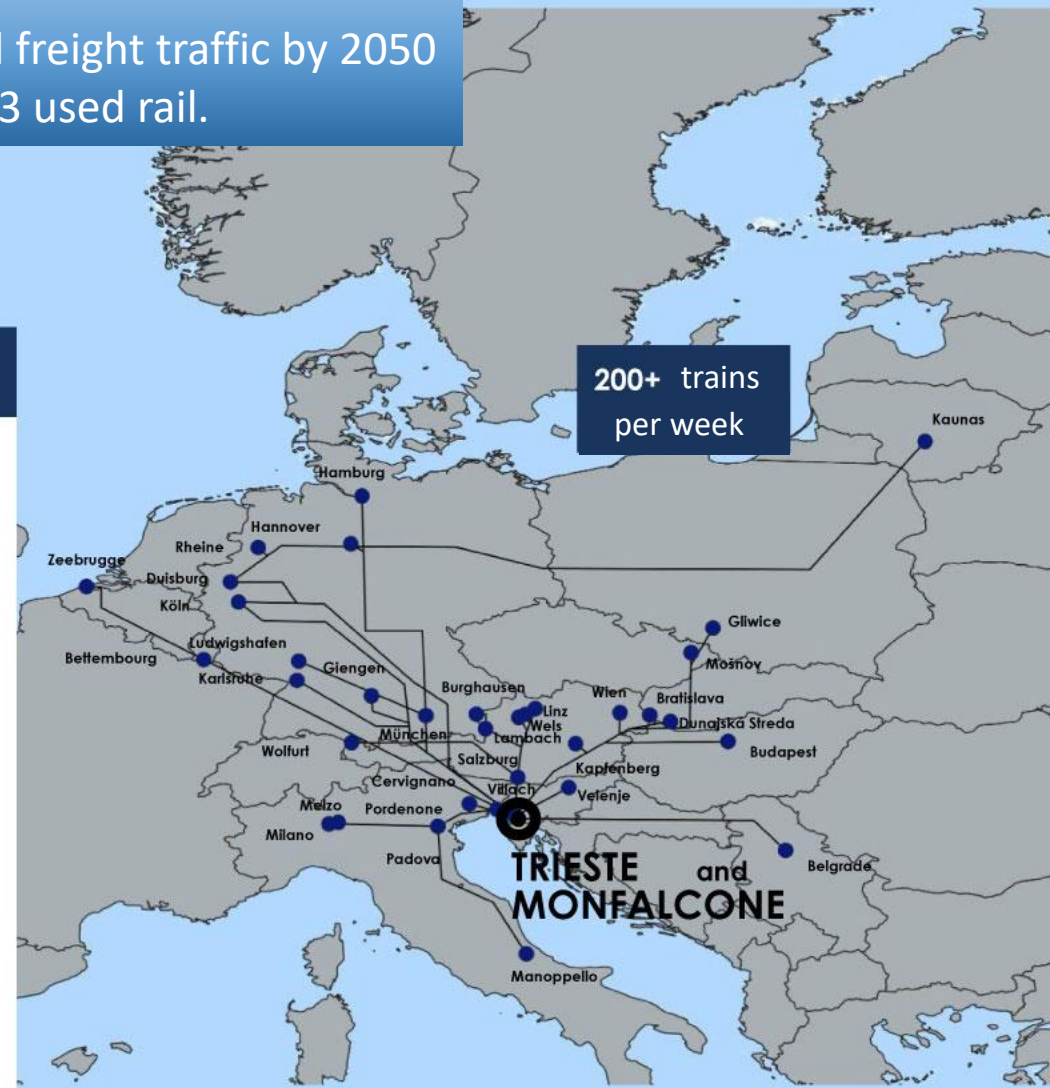
Ports serving Europe

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Modal shift:
EU's target: 50% of European rail freight traffic by 2050
Trieste: 54% of containers in 2023 used rail.

Weekly scheduled train services

<p>Austria Kapfenberg, Linz, Salzburg, Villach, Wels / Lambach, Wien, Wolfurt <i>via Villach:</i> Linz, Salzburg, Wien, Wolfurt</p>	<p>Italia Cervignano, Manoppello, Melzo, Milano, Padova, Pordenone <i>via Cervignano:</i> Duisburg, Belgrade</p>
<p>Belgio Zeebrugge</p>	<p>Lituania Kaunas</p>
<p>Repubblica Ceca Mošnov</p>	<p>Lussemburgo Bettembourg</p>
<p>Germania Burghausen, Giengen, Karlsruhe, Köln, München, Rheine <i>via Duisburg:</i> Kaunas <i>via München:</i> Hamburg, Hannover, Köln, Ludwigshafen</p>	<p>Polonia Gliwice</p>
<p>Ungheria Budapest</p>	<p>Serbia Belgrade</p>
	<p>Slovacchia Bratislava, Dunajská Streda</p>
	<p>Slovenia Velenje</p>



Districts as potential new markets

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% INTERMODAL



**Prosecco
Conegliano –
Valdobbiadene**

23%



**Metallurgical
of Brescia**

13%



**Wood and
furniture of
Brianza**

80%

Save the date



Italian
Maritime
Economy
Conference
2024

The new challenges
for ports in the
Euro-Mediterranean
region: the Red Sea
crisis and the
transformations driven
by green models

sr-m.it

Naples
Gallerie
d'Italia
19 July
2024



Thank you
for your
attention