

PANEL 4 - COAST GUARD FUNCTIONS AND CONTROL

Overview on Marine Economic routes and impact for the environment

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TOPICS



Mediterranean maritime outlook. The new challenges and opportunities



The recent phenomena affecting maritime transport and the main routes



Forecasts and conclusions



The Mediterranean remains strategic: key figures

The Mediterranean Sea

is increasing its centrality

in the global economy

27%
WORLD'S
CONTAINER
LINER
SERVICES

20%
GLOBAL
SHIPPING
TRAFFIC

76%
SHARE OF
TRADE BETWEEN
ITALY AND MED
BY SEA

18 PORTS
THROUGHPUT
>1 MLN TEUs

**More than
1bn tonnes**
SUEZ CARGO
TRAFFIC

+541%
GROWTH OF
CONTAINER
TRAFFIC SINCE
1995

**587 mln
tonnes**
SHORT SEA
SHIPPING

Suez, a crucial waterway to the Euro-Med area

20,694
n. ships

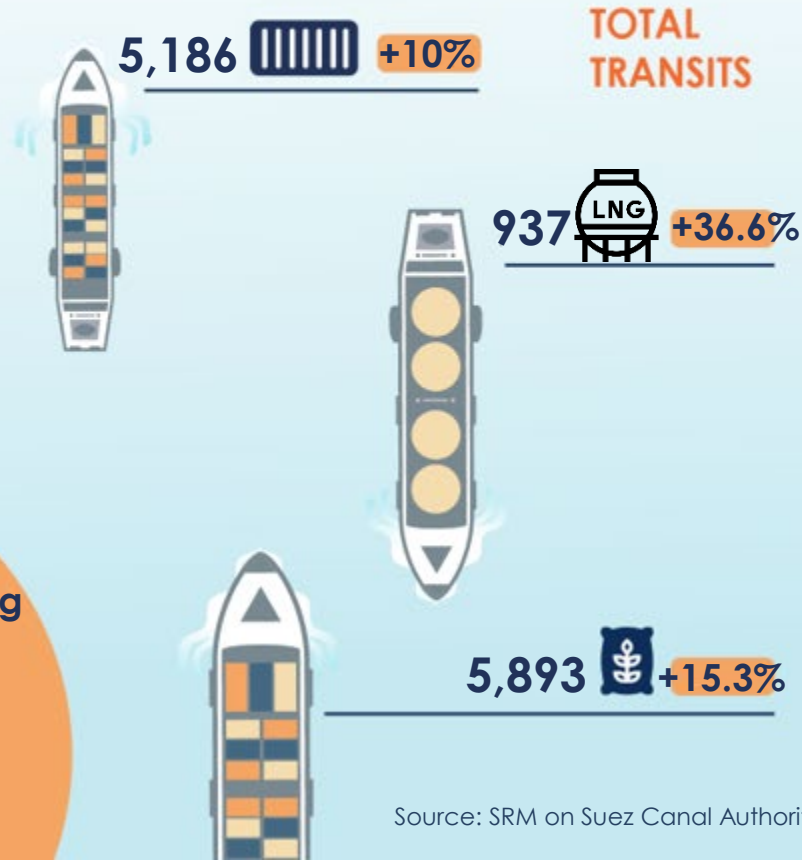
+9.9%

1,27
net tonnage

+8.5%

NEXT STEPS:

- **Expanding** and **dredging** the southern section of the Canal (by 2023)
- Target of **15% share of global energy trade** (by 2040)



of global trade



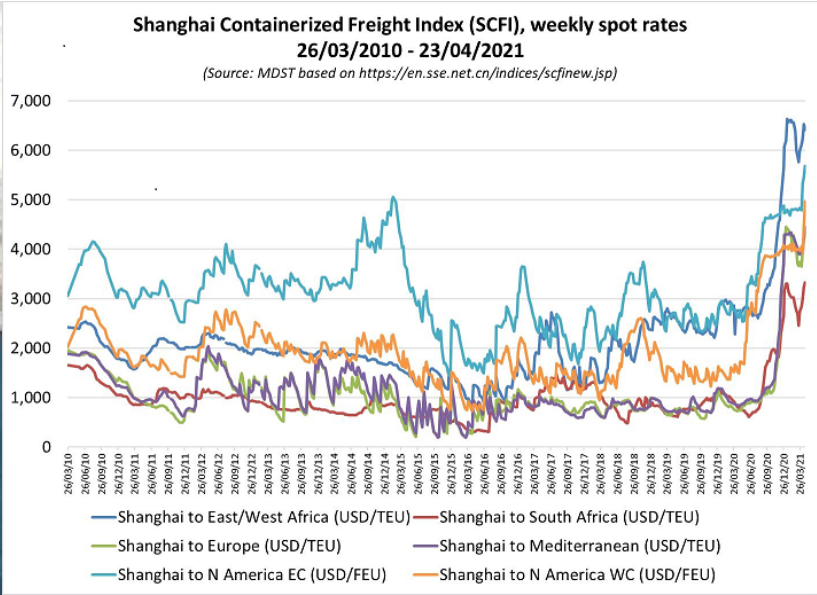
of oil traffic



\$6.3 bn
the highest
annual revenue
in the history of
the Canal

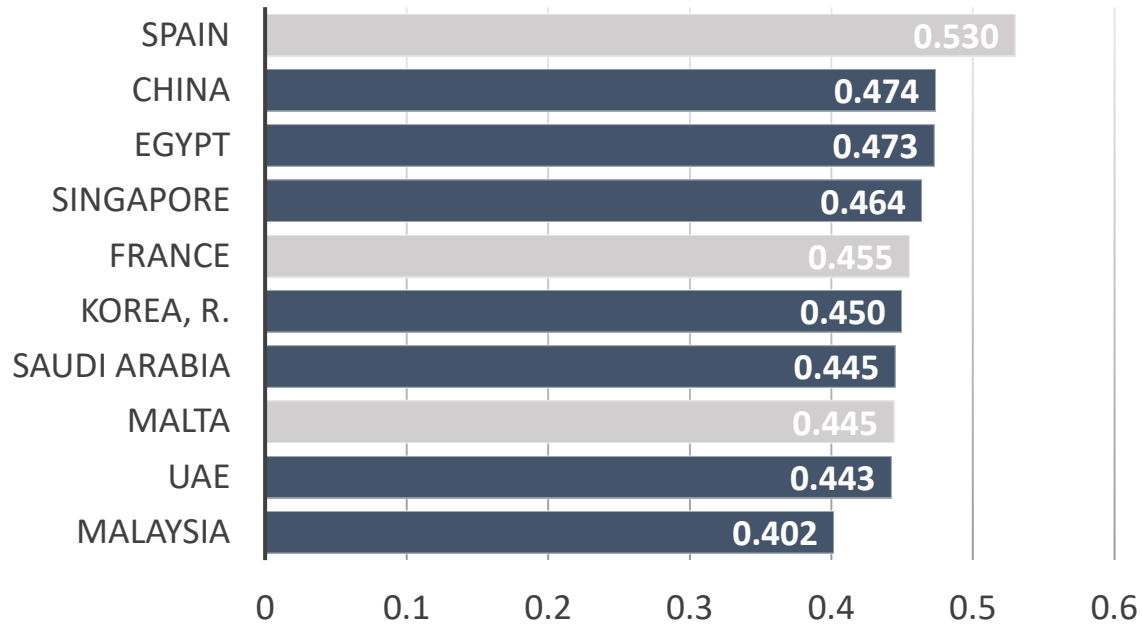
Source: SRM on Suez Canal Authority

The dynamics of international maritime trade are highly dependent on this crossroads: the case of the Ever Given



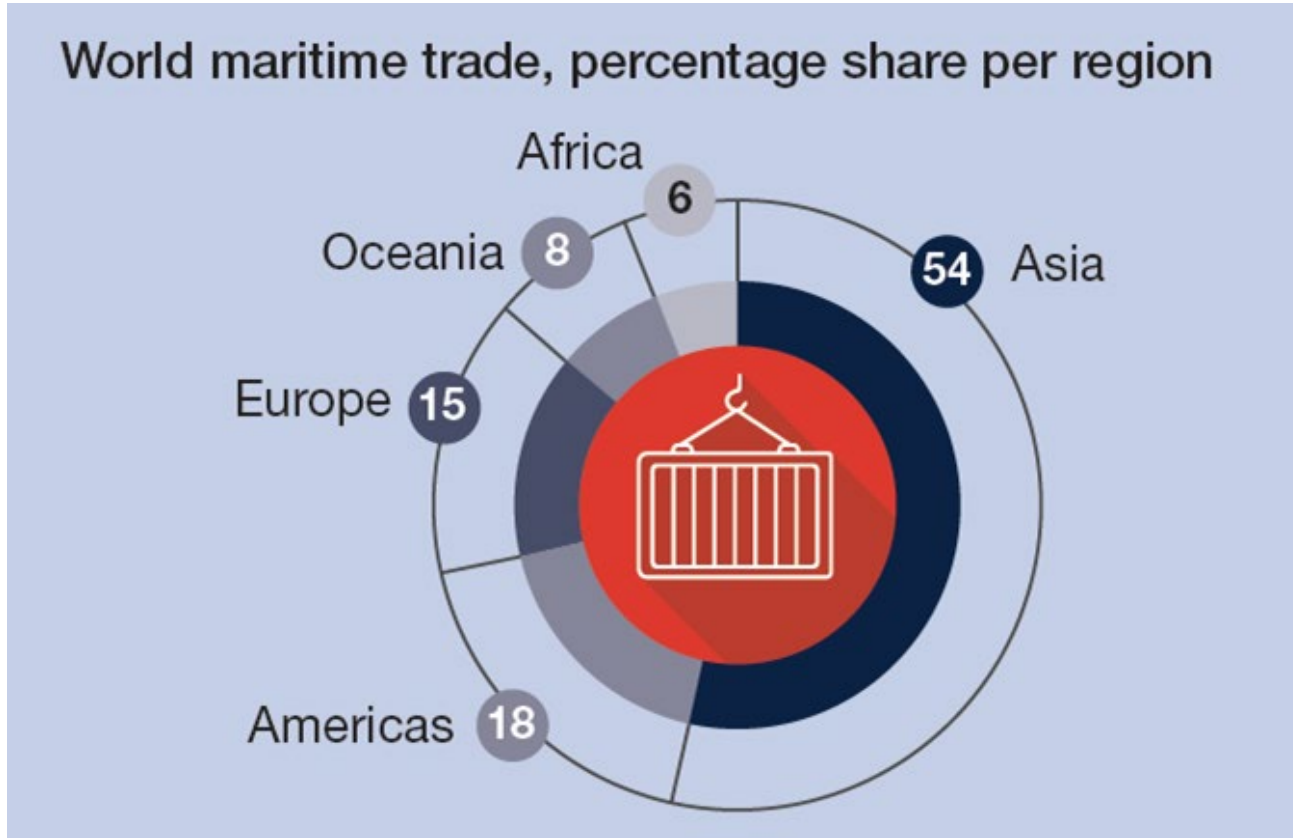
The deep sea routes: bilateral connectivity index 2021

Top 10 partners in 2021 - Italy



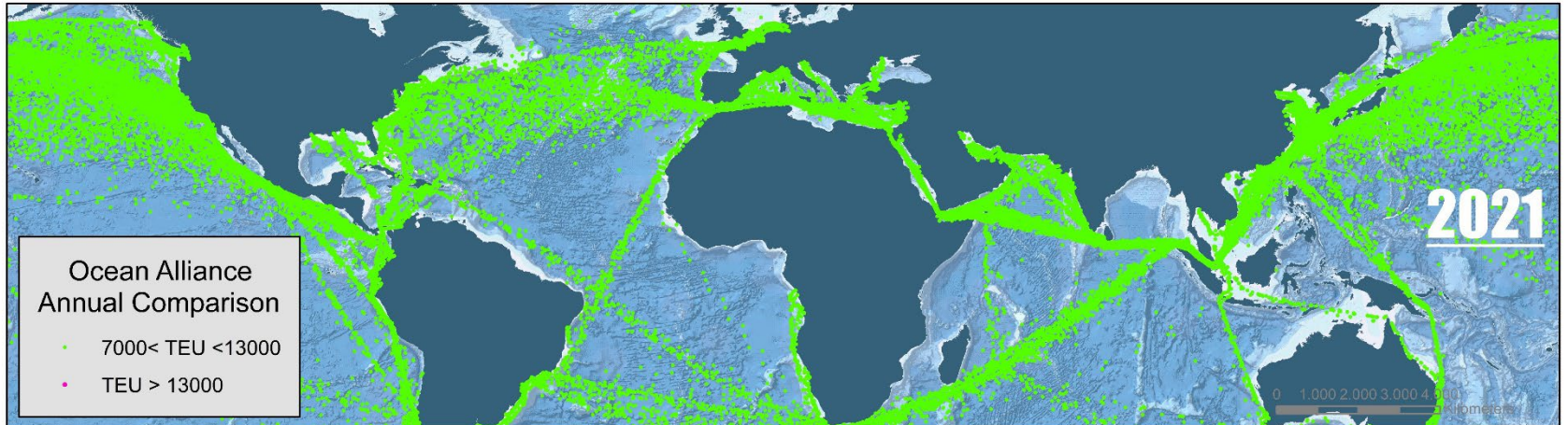
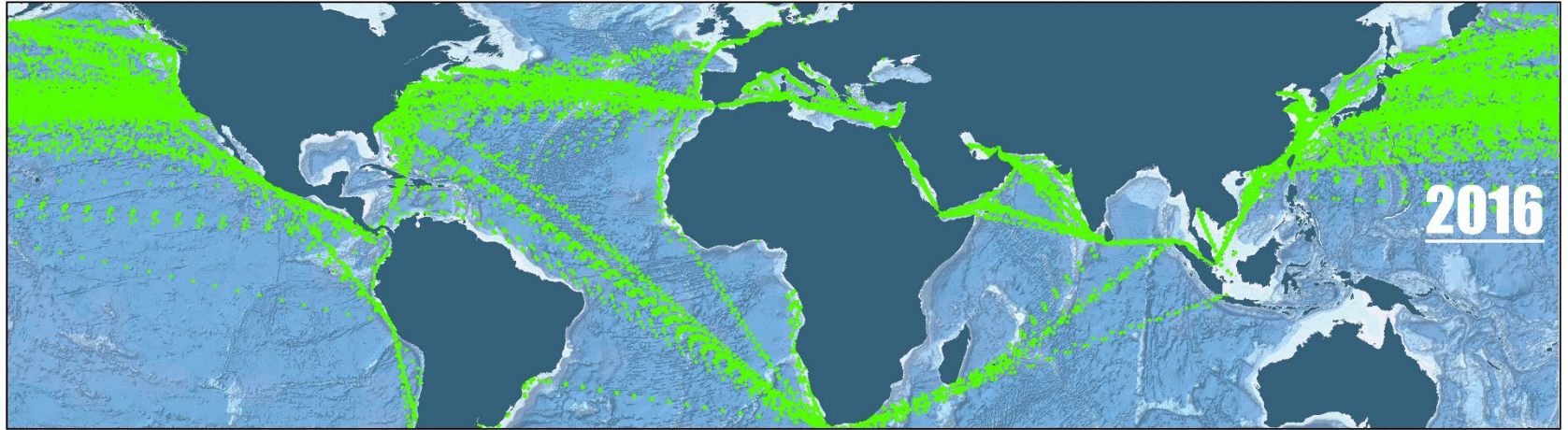
For Italy, Suez is a strategic maritime route: in order to reach 7 of the 10 countries most connected to us, we have to pass through the canal.

The dominant role of ASIA in world maritime trade

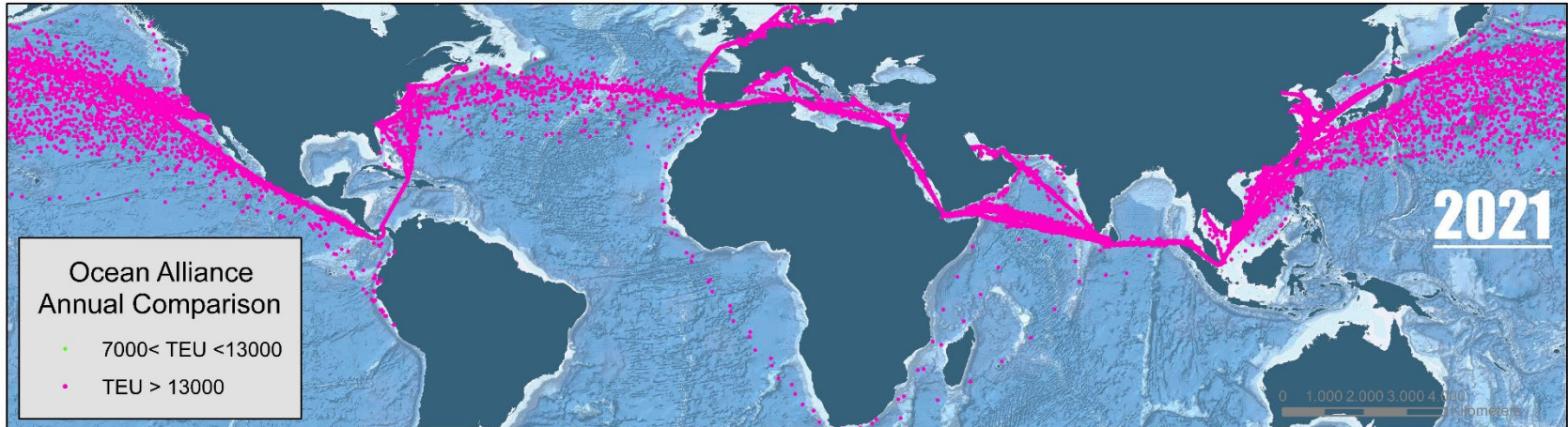
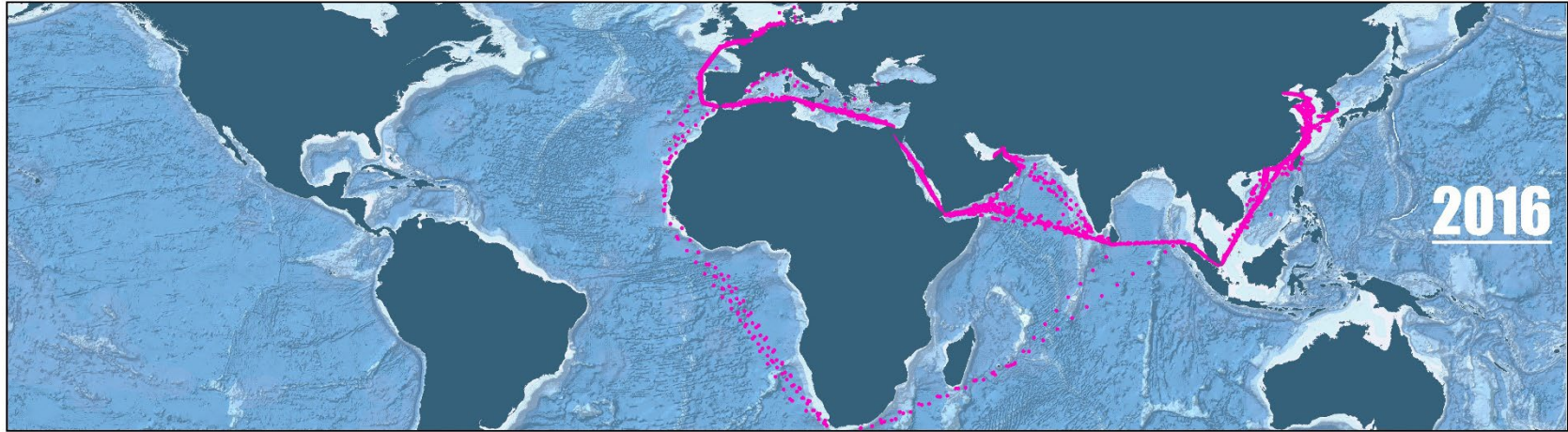


Source: UNCTAD 2021

Ocean Alliance – medium size ships (7000 -13000 TEUs)



Ocean Alliance – Megaships (TEUs > 13000)



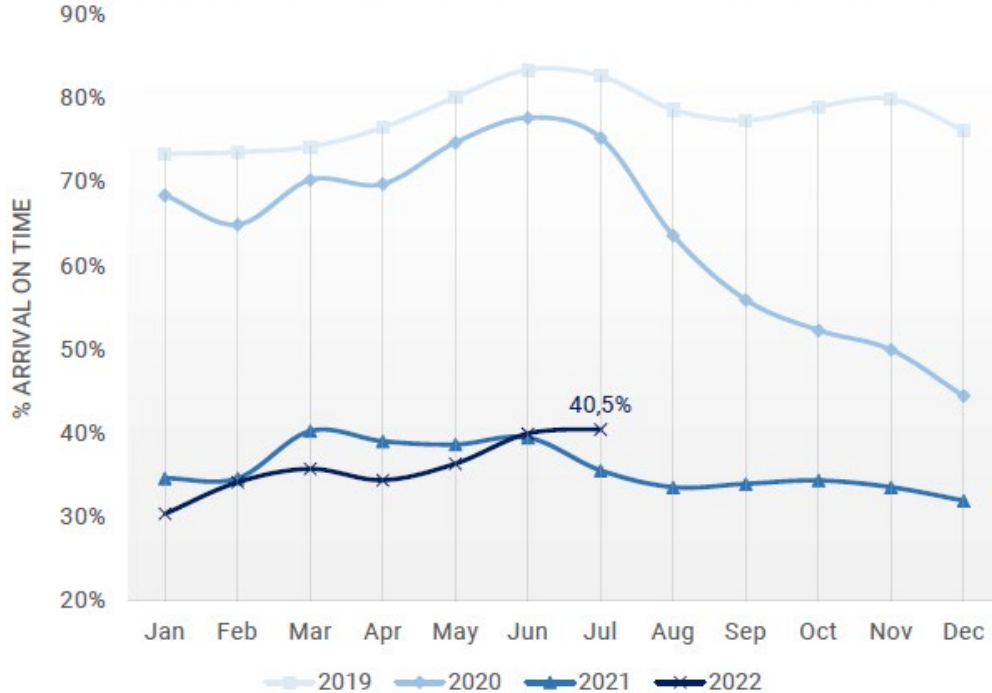
Freight rates: trend on strategic routes



Source: Drewry

Port congestion and Omicron

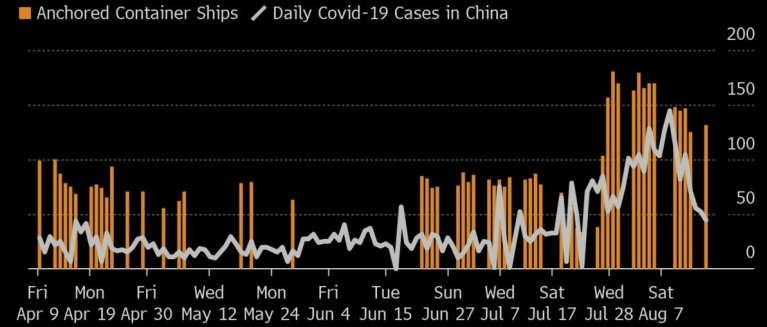
Average Carriers Reliability (Arrival on time within one business day)



Source: SRM on Bloomberg, DB Group and Marinetraffic

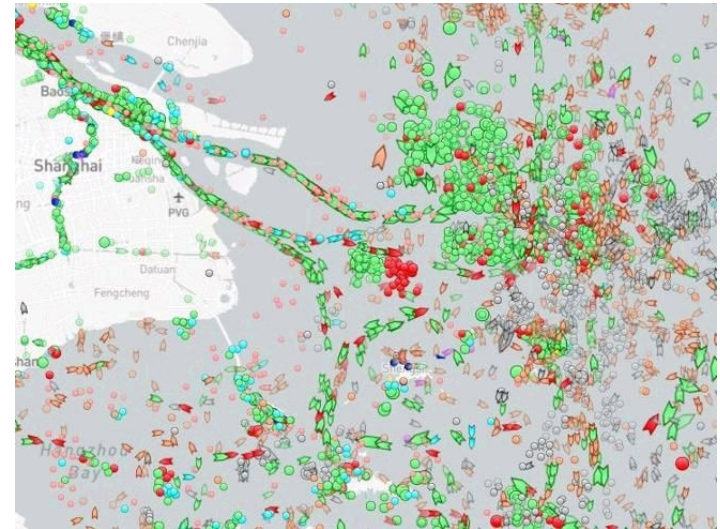
Traffic Jam

A rise in Covid-19 cases in China raises congestion off Shanghai-Ningbo



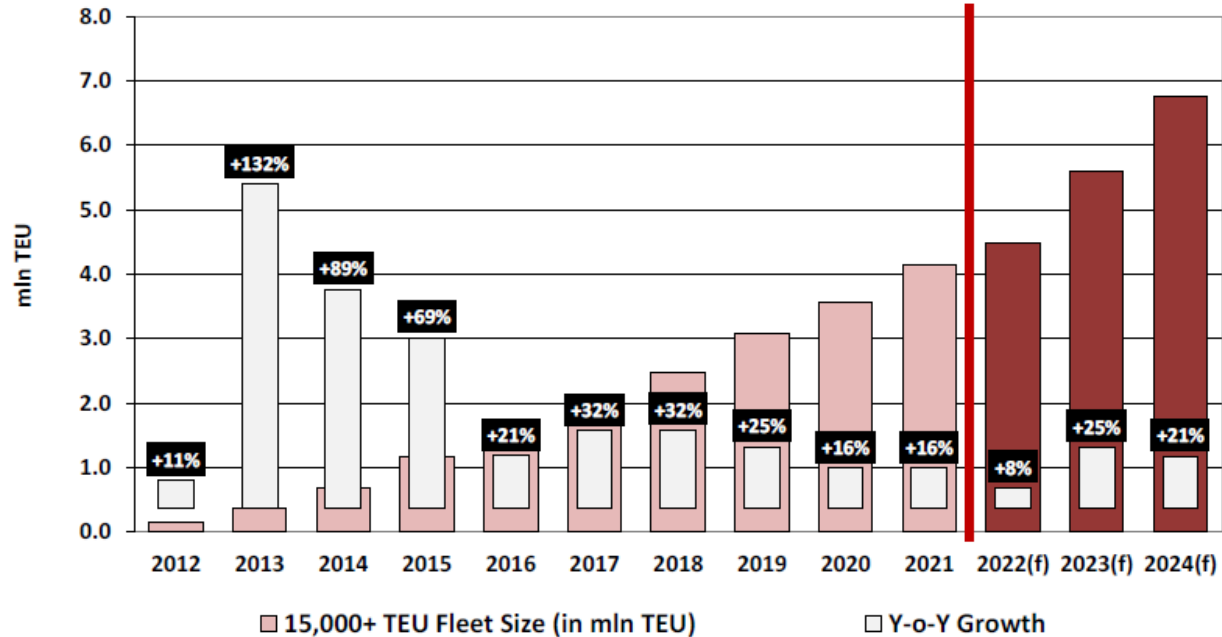
Sources: Bloomberg, IHS Markit, Genscape, John Hopkins University
 Note: April to August data based on 55 observations of port traffic for container ships in shared anchorage area off Shanghai and Ningbo. Not all days available.

Bloomberg



Projected Ultra Large Containership Fleet Growth


(Jun 2022 ; only units over 15,000 TEU ; in mln TEU ; after assuming slippage and demo)




Source: Banchero Costa

Not only ports are changing, but also shipping industries: alliances, gigantism and vertical integration are new strategies

Alliances




MAERSK LINE




MSC

2M

Capacity : 2.1 million TEU
Vessels : 185
Routes served: 44




COSCO SHIPPING




OOCL

Ocean Alliance

Capacity : 3.8 million TEU
Vessels : 330
Routes served: 38




EVERGREEN




CMA CGM

THE Alliance

Capacity : 3.5 million TEU
Vessels : 249
Routes served: 31




HMM




Hapag-Lloyd

Capacity : 3.5 million TEU
Vessels : 249
Routes served: 31



YANG MING

Capacity : 3.5 million TEU
Vessels : 249
Routes served: 31

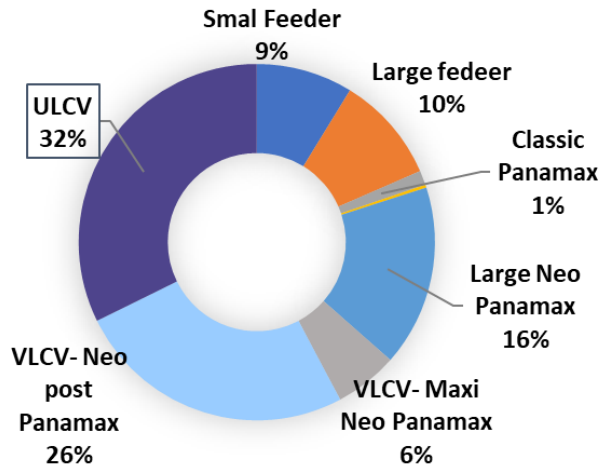


ONE
OCEAN NETWORK EXPRESS

Capacity : 3.5 million TEU
Vessels : 249
Routes served: 31

Gigantism

Orderbook by Dimension-capacity in TEUS (%)


















SRM on Drewry, OECD

Vertical integration


Carrier	Terminal	Logistics	Rail	Truck
Maersk	■	■	■	■
MSC	■	■	■	■
CMA CGM	■	■	■	■
Cosco	■	■	■	
Evergreen	■	■	■	■
Hapag-Lloyd	■	■		
ONE	■	■		■
Yang Ming	■	■		■
HMM	■	■	■	■


Outlook on Italian ports


		Var. % 21	Var. % 19
	Liquid bulk 83,3m tonnes	 +5,6%	 -4%
	Dry bulk 30,8 m tonnes	 +13%	 -2%
	Containers 5,9 m TEU	 +7%	 +11,6%
	Roll-On Roll-Off 56,4m tonnes	 -3,2%	 +8,3%
	Other general 10,6 m tonnes	 +10,7%	 -10,9%

ADSP Gen-Giu 22

244 m tonnes



Var. % 21  +5,1%

Var. % 19  +2,7%



20,4 mln

Of which
2,5 mln cruise

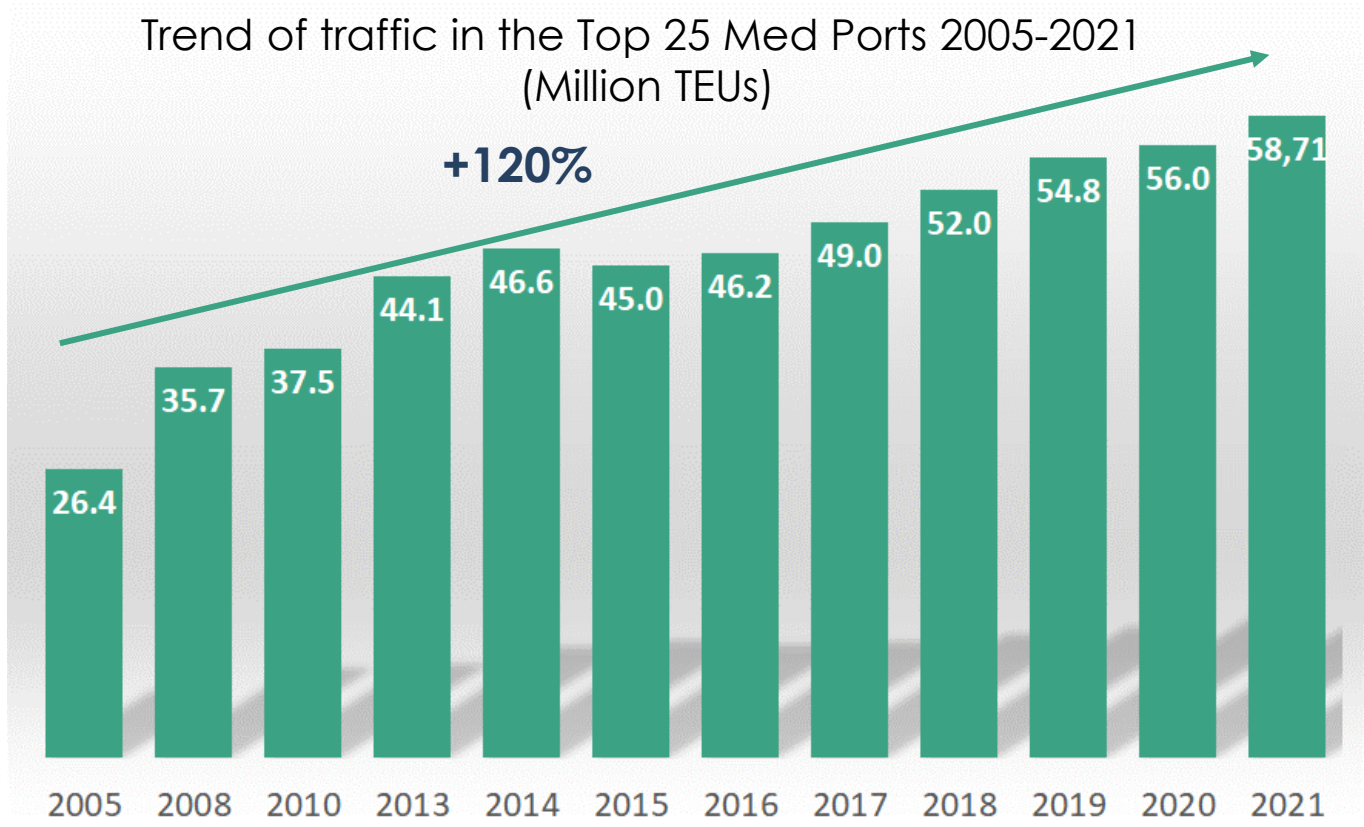
Var. % 21  +75,8%

Var. % 19  -14,8%

+702,5% -45,8%

Source: SRM on Assoporti

Despite the crisis, the Mediterranean does not lose traffic



Source: SRM on Port Authorities



Possible «equations»



GREEN PORTS

Intermodal
Renewables
Digital



GREEN SHIPS

Methanol
Hydrogen
Ammonia
LNG



ZES E ZLS SHORT SEA SHIPPING

Reshoring
Nearshoring



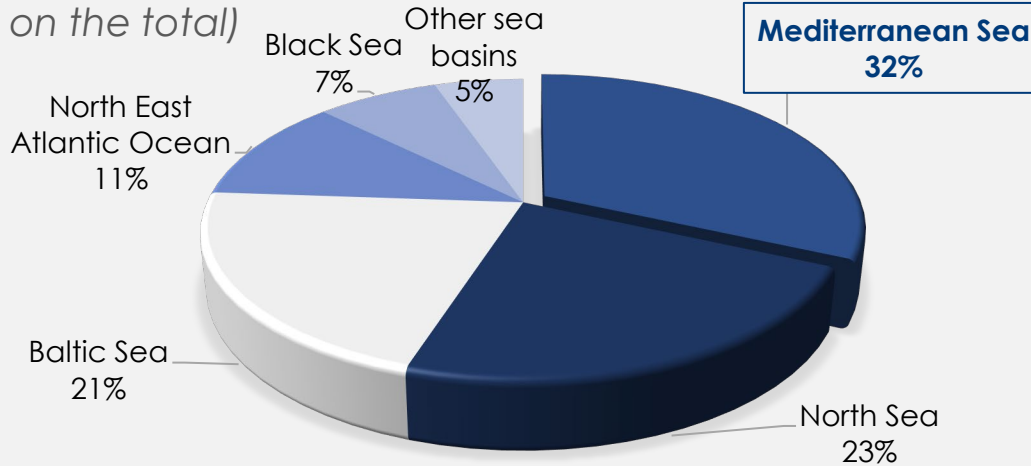
GREEN LOGISTICS

Digitalization
Innovation



Short Sea Shipping (SSS) is growing and is always a challenge

SSS in Europe
(% on the total)



- Covid pandemic and reshoring are changing supply chains: SSS benefits from this.
- European SSS mainly concentrates in the **Mediterranean** with 587 million tonnes amounting to **32%** of total.
- In the **Med Area**, **Italy ranked 1st** with a volume equal to 225 million tonnes of cargo (**38% market share**).

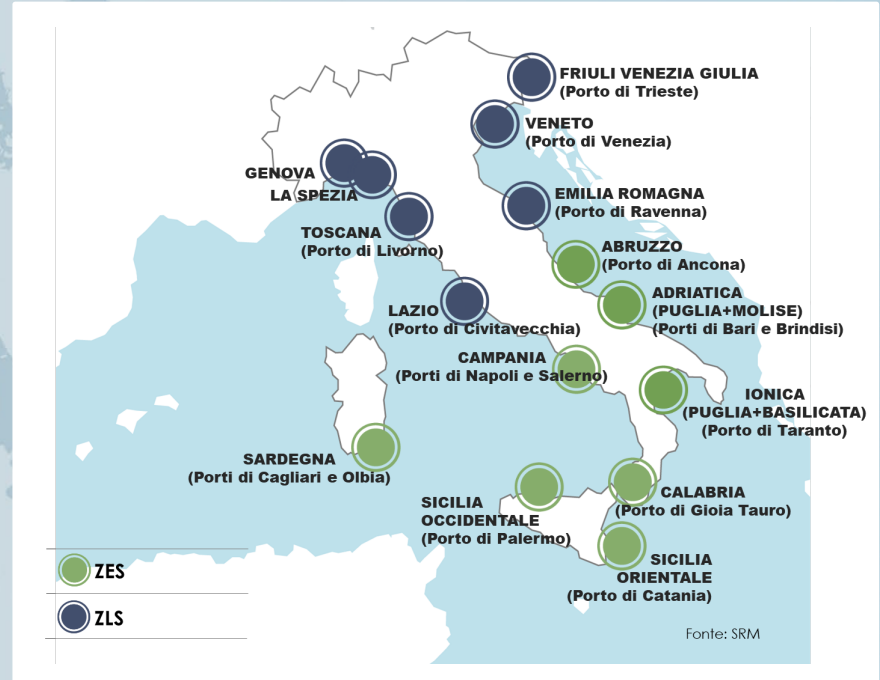
SSS in the Med	Italy	Spain	Greece	France	Others
	225	110	79	50	122
	38%	19%	14%	8%	21%

*Million tonnes and % | Source: SRM on Eurostat, 2022

SEZ and SLZ as new opportunity

- Port is the development driver
- Bureaucratic facilities
- Public incentives (by State or Regions)
- Free Zone
- Banks facilities
- Sinergies between Logistics and Industry

SEZ IN THE NRPP



630 million euros for last mile, logistics and infrastructures

MISSION 3: INFRASTRUCTURE FOR SUSTAINABLE MOBILITY: 31.4 €bn

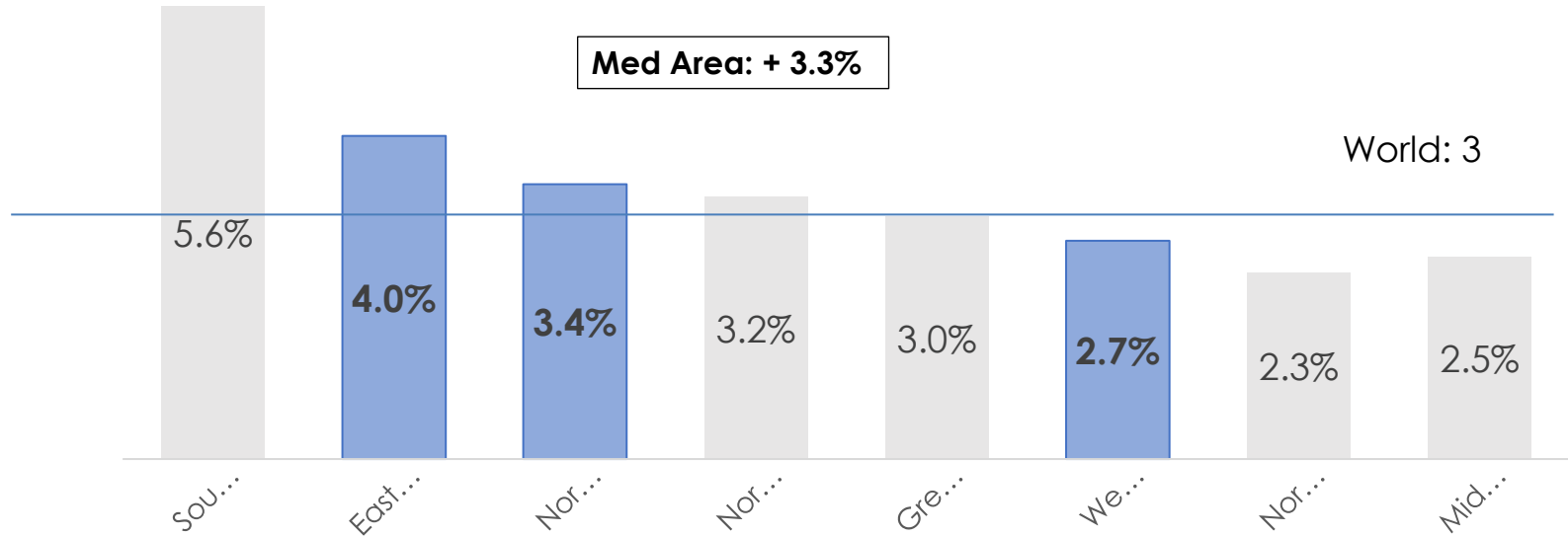
In details, for the **ports: about 4 €bn** to

- Development of **maritime accessibility** and **resilience of port infrastructure** to climate changes
- **Digitalisation of the logistics chain** to increase national logistical competitiveness by creating an interoperable digital system between public and private entities for the transport of goods and logistics (**250 €bn**).
- **Green ports** to make port activities more compatible and harmonious with urban activities and life, thanks to interventions to **reduce energy consumption and increase environmental sustainability**, also using renewable energy (**270 €bn**); **cold ironing** - Electrification of the platforms (**700 €bn**)



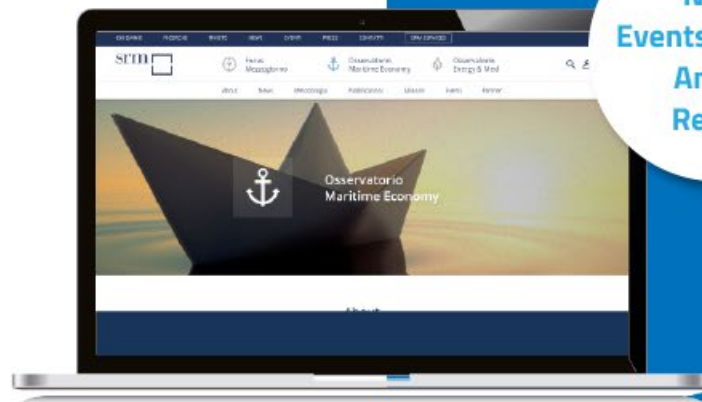
Mediterranean growth will continue.....

World Container forecast annual average **2021-2026** (TEU)




Source: SRM on Drewry

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