

NAVIGATING THE NEW REALITY: ARCTIC SEA ROUTES AND ECO-FRIENDLY SHIPBUILDING

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The value of Italian ports for Europe

#Italianports



15%

Italian Ports
of European Ports Total Traffic (EU 27)

21%

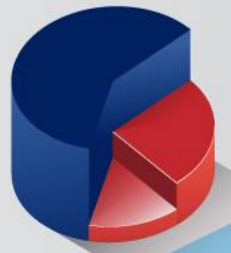
Italian Port calls
of European Port calls (EU 27)



% of European Ports

- 24%** Ro-Ro
- 15.8%** Liquid Bulk
- 13%** Container
- 8.7%** Dry Bulk

Italian Ports Traffic (Ton)



Italian Shipping Fleet (DWT ranking in EU 27)

- 1st** Ro-Ro Ferries
- 2nd** Car Carrier
- 2nd** Liquid Bulk
- 4th** Dry Bulk



Italian Ports main figures

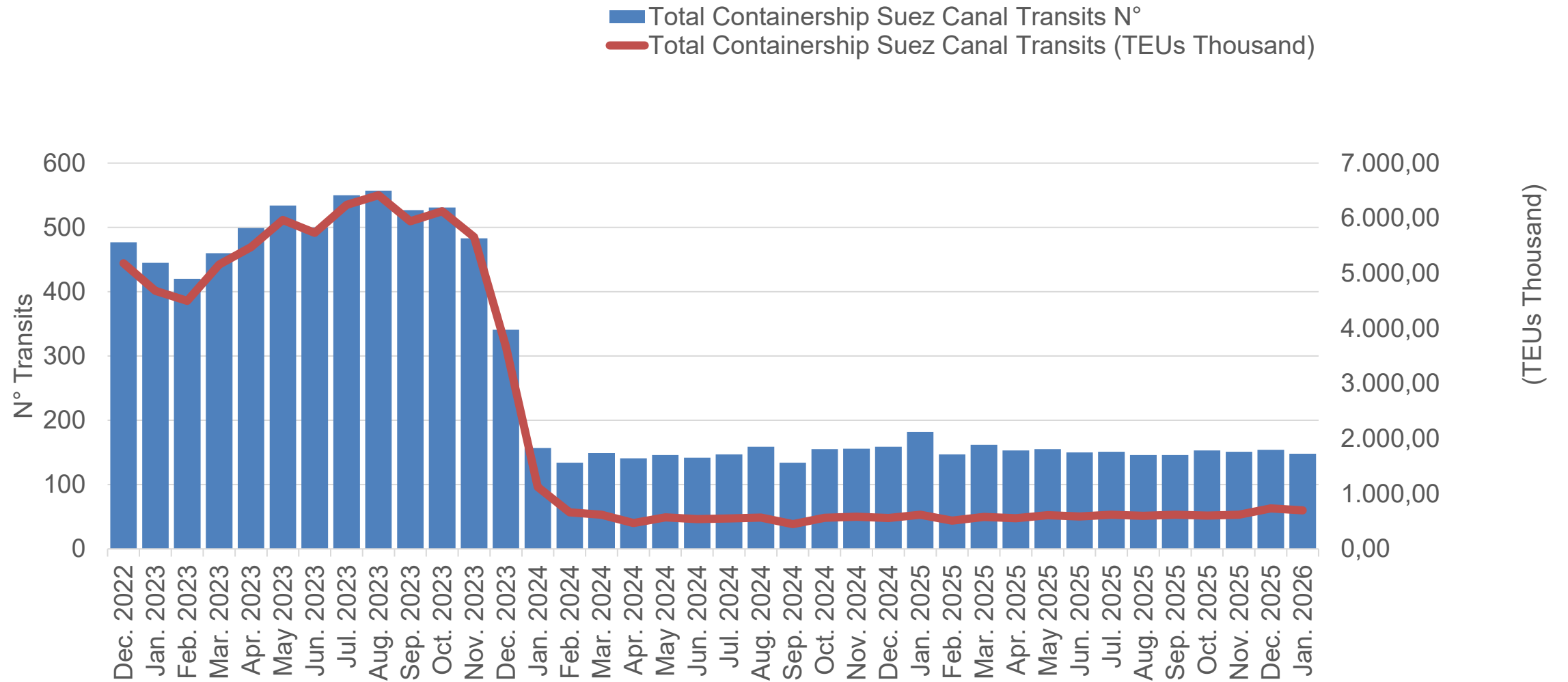
- ★ **Trieste** 1st European Port in the Mediterranean Area – SSS (Ton)
- ★ **Gioia Tauro & Genoa** 9th and 16th in the ranking of Container Ports in the Euromed Area (Teus)
- ★ **Genoa, Leghorn, Messina** are among the Top 10 European Ports for Ro-Ro traffic (Ton)



Source: SRM based on Eurostat

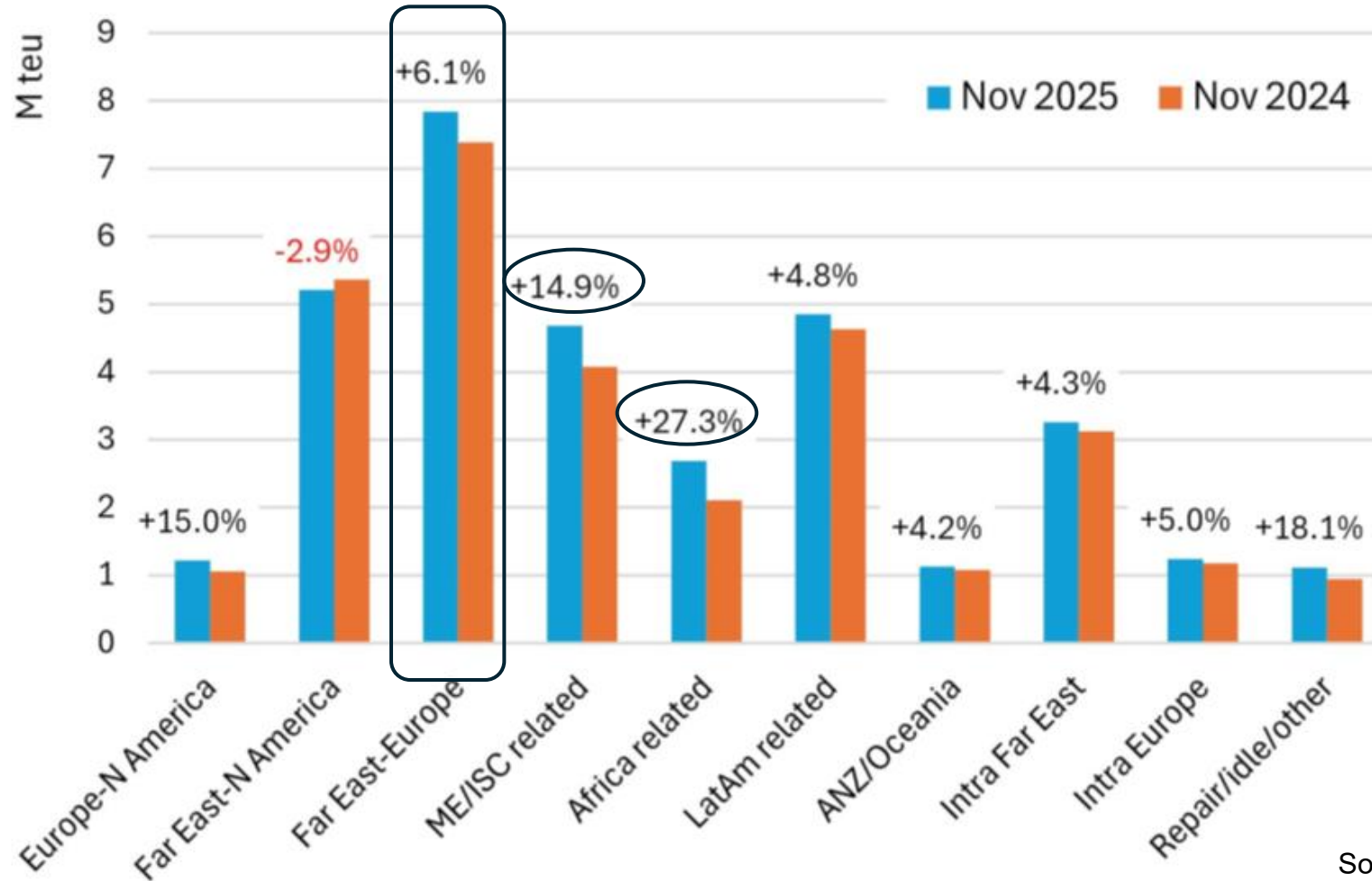


Container traffic through the Suez Canal



Source: SRM on Clarksons

Global container fleet deployment by trade area



Global container fleet: +7.3%

33.2 Million TEUs of capacity

Source: Alphaliner

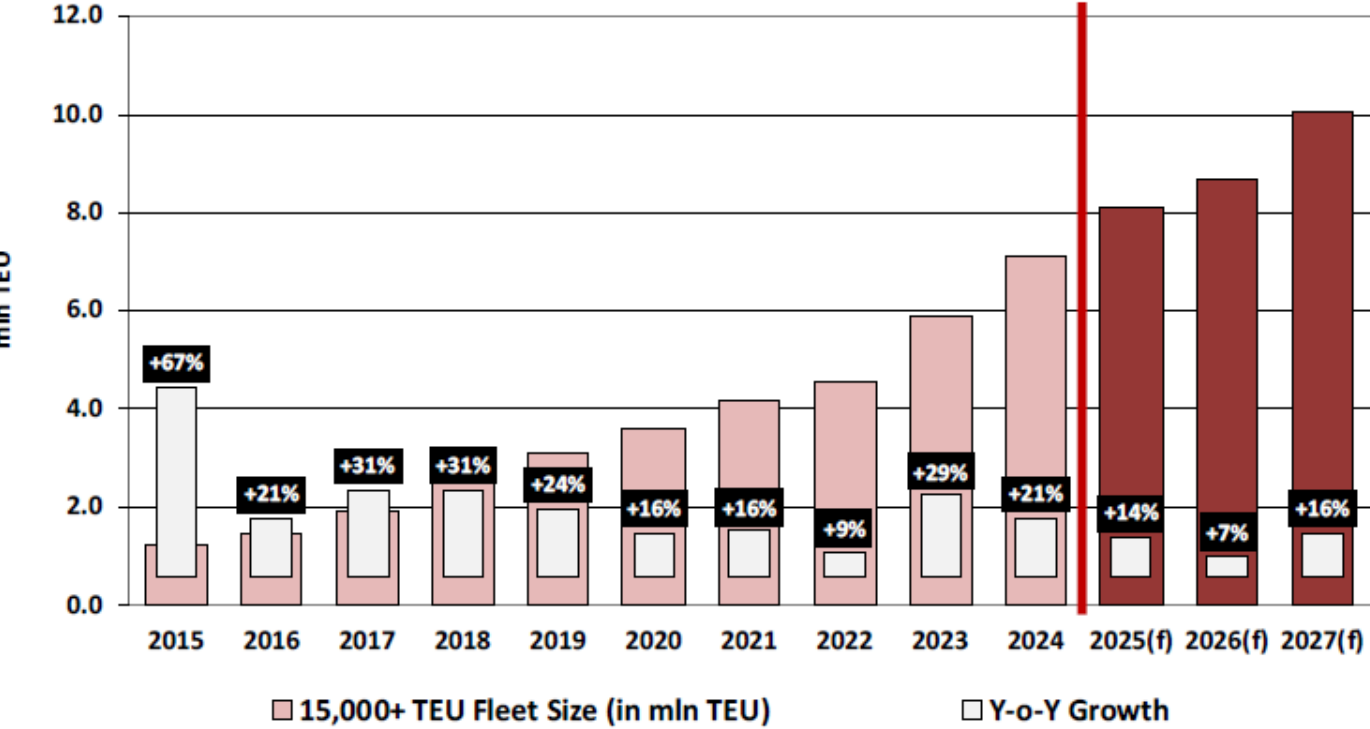
ISC: India Sub Continent

ANZ: Australia New Zealand

A never-ending phenomenon: megaships

Projected Ultra Large Containership Fleet Growth

(jul 2025 ; only units over 15,000 TEU ; in mln TEU ; after assuming slippage and demo)



Evolution of container ship capacity



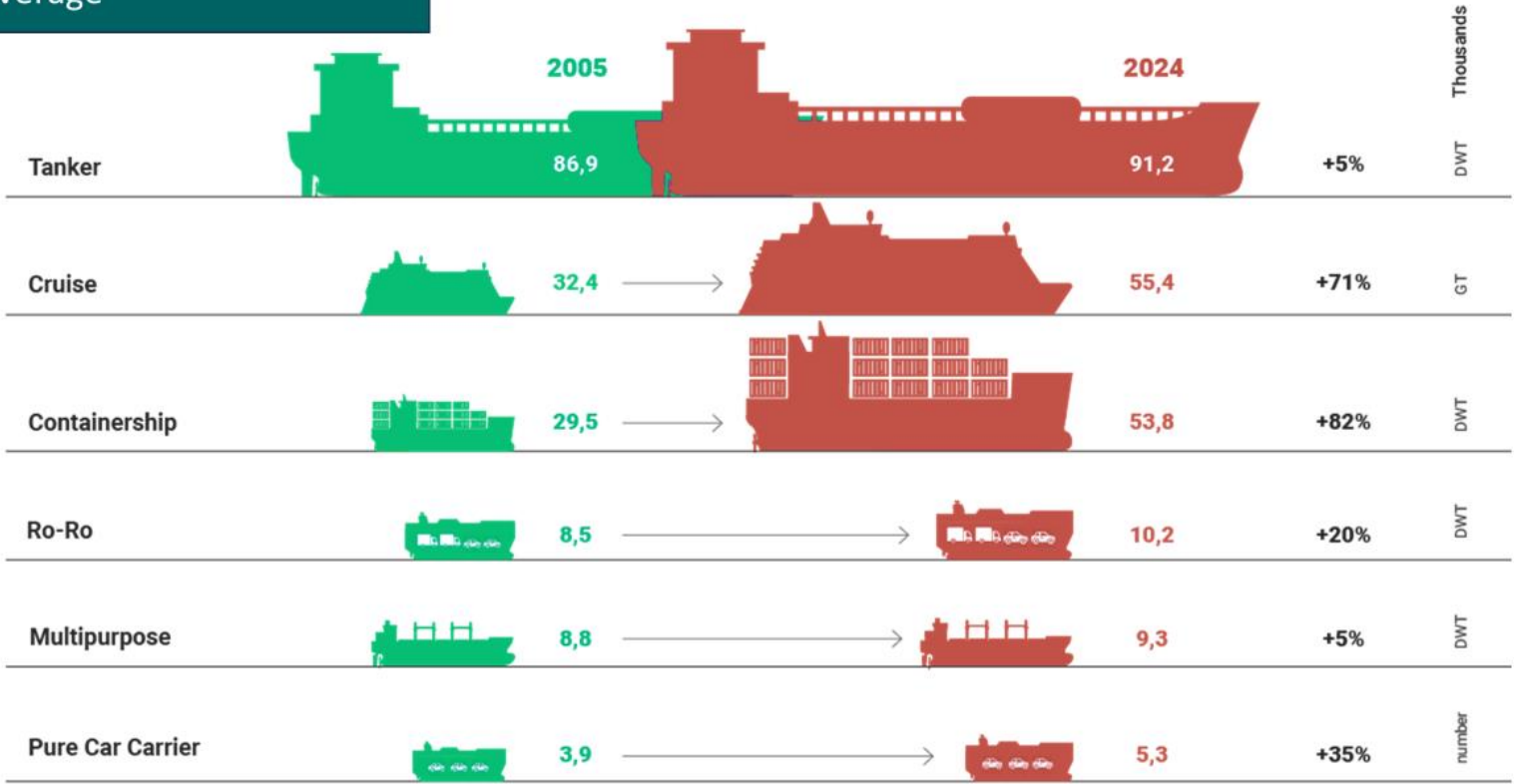
Source: © www.thefluctus.com

* These ships do not pass through the Panama Canal because they exceed the permitted size limits.
 ** Top design speed.

A never-ending phenomenon: megaships

Naval Gigantism and investment in ports

Ship Size Average

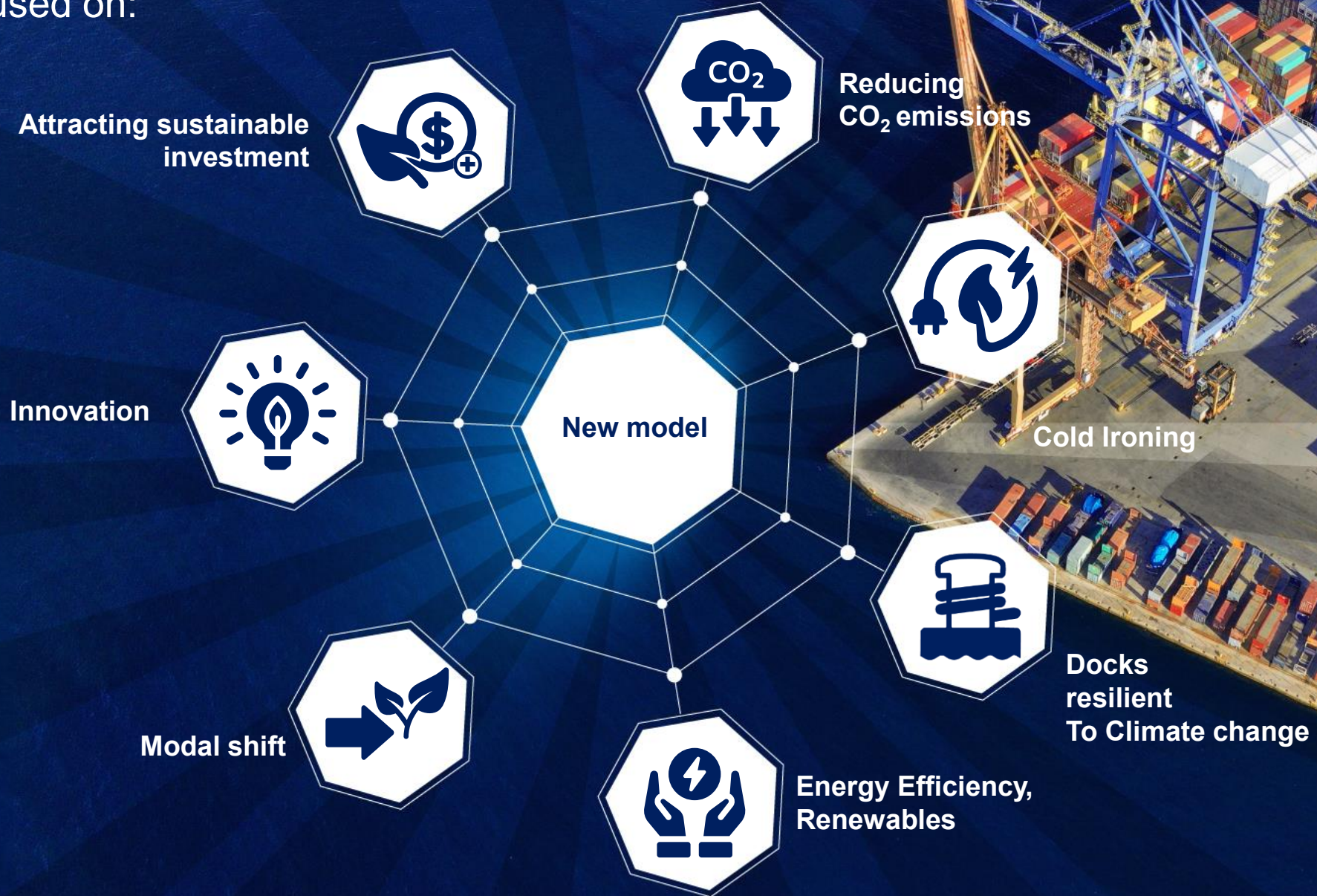


Source: SRM su Clarksons



Ports are investing in a new model “green & smart”

Focused on:

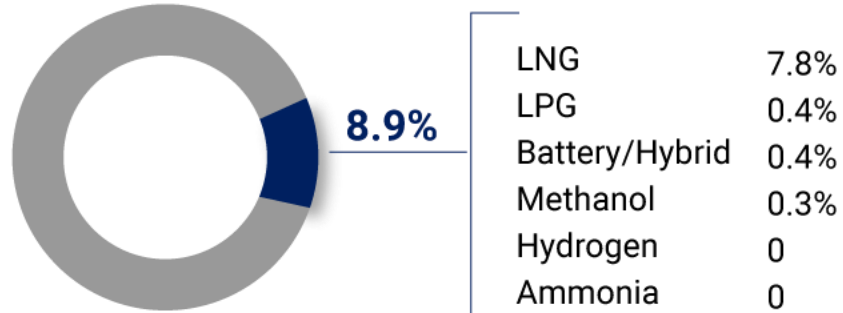


A big challenge for ports and shipping: alternative fuels

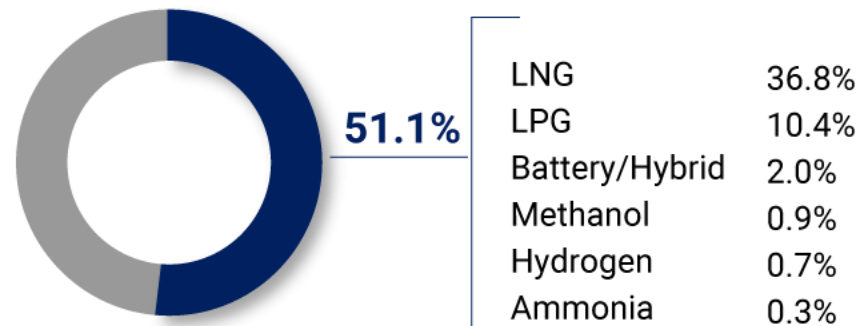
Uptake of alternative fuel technologies for large bulkers, tankers and containerships

Conventional LNG Methanol Ammonia

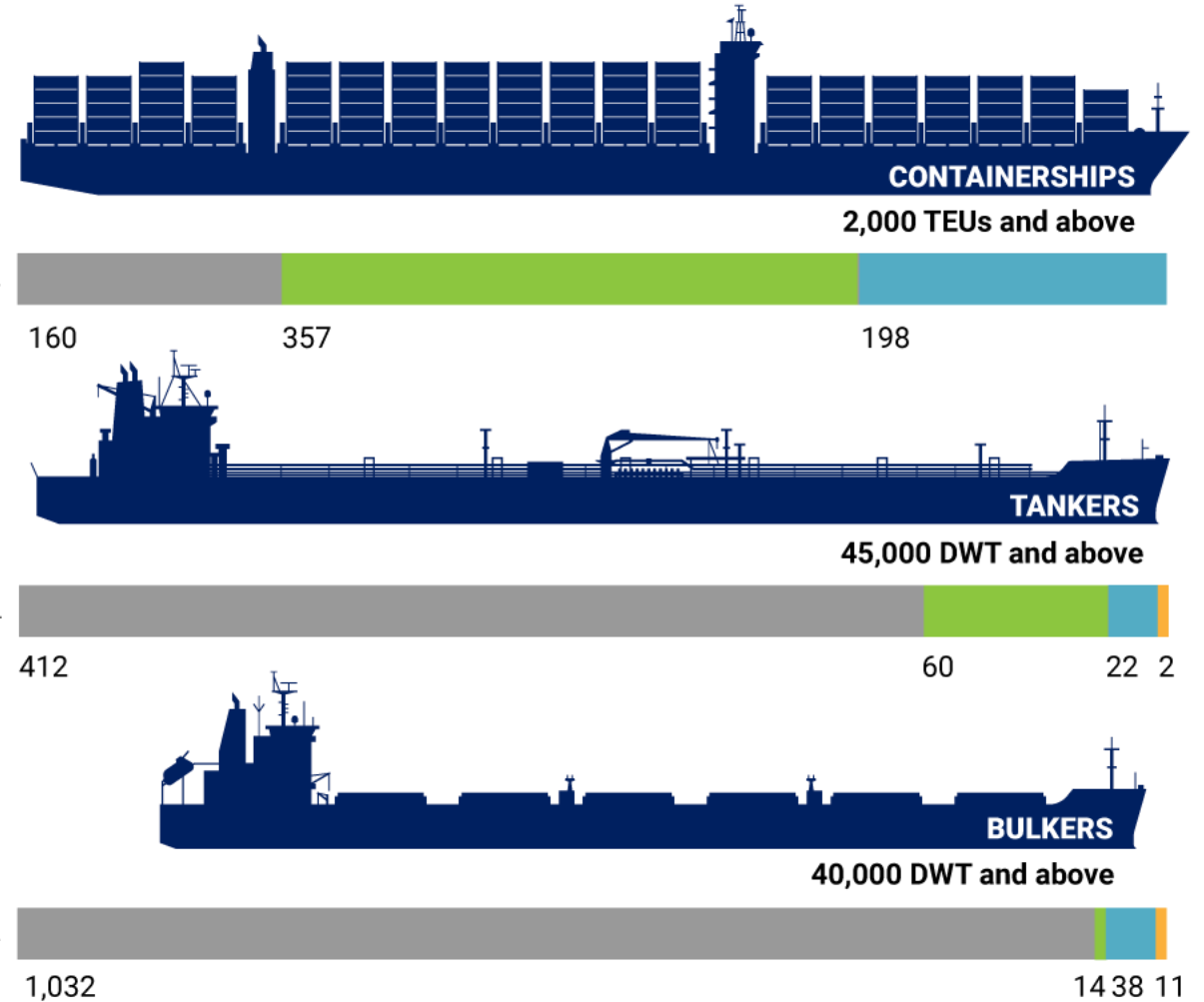
GROSS TONNAGE IN OPERATION



GROSS TONNAGE IN ORDER



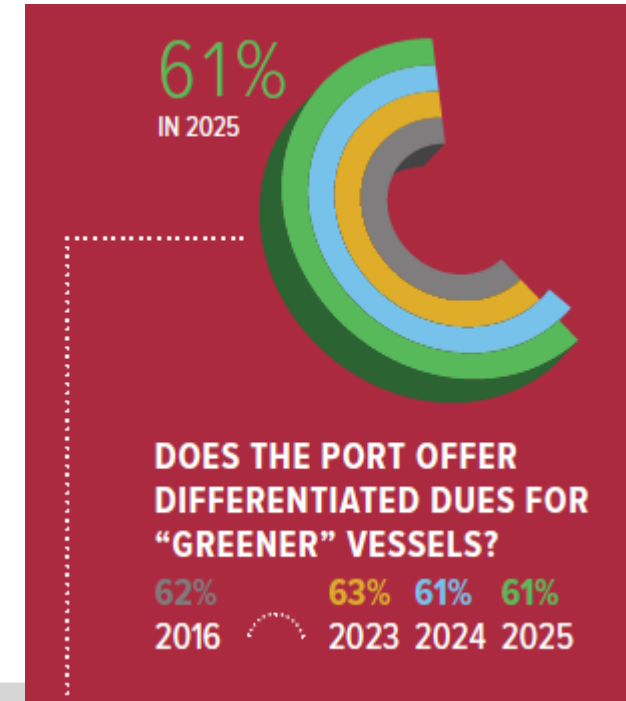
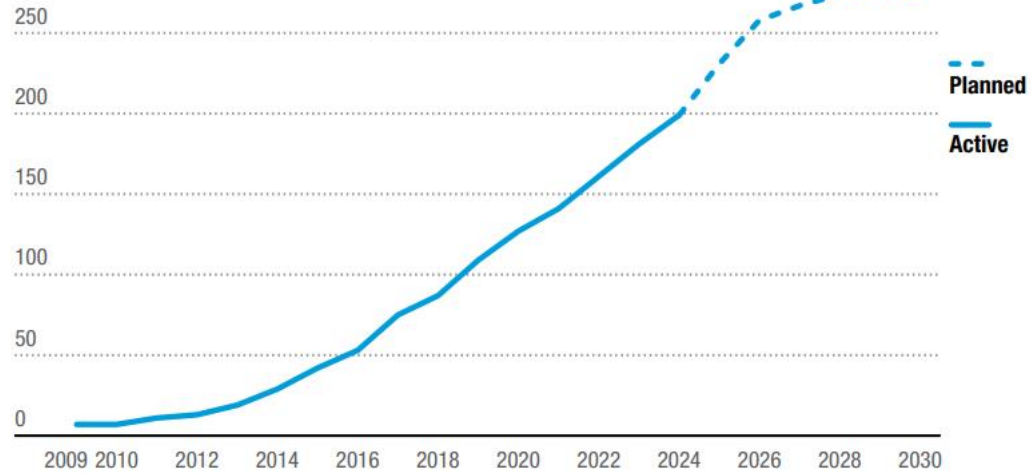
Share of order book. Number of ships



Source: SRM elaboration on DNV

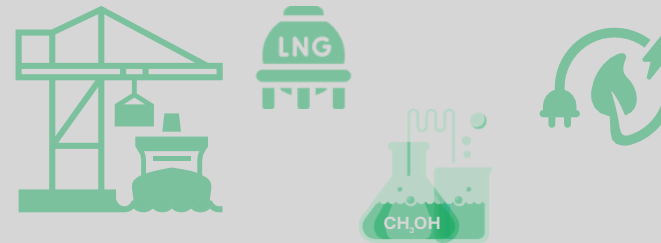
Current situations about bunker places

Ports providing LNG bunkering services
(Number)



Alternative fuels Bunkering ports

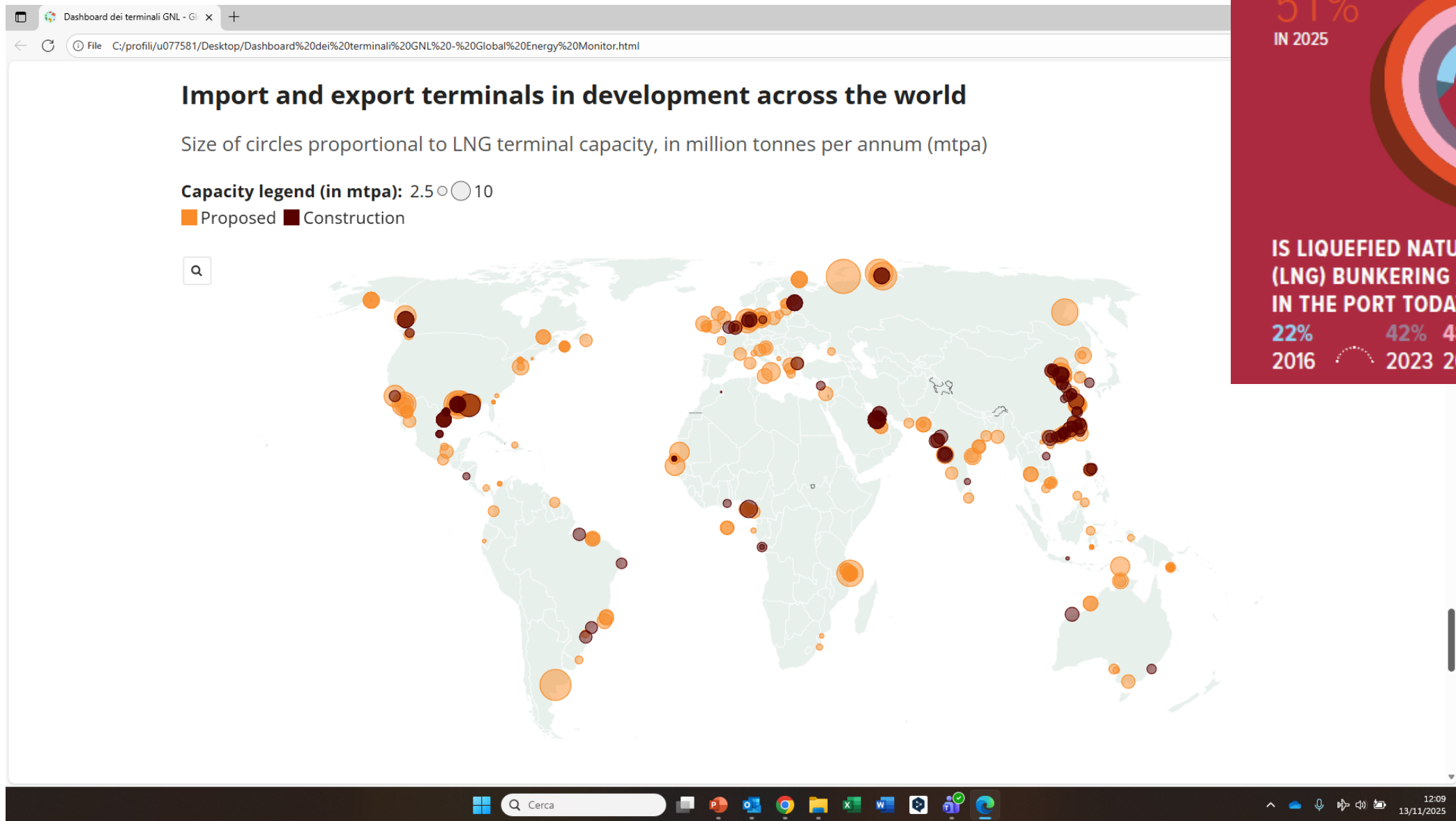
	Active	Under development
LNG	210	60
Methanol	22	21



Shore Power Connection **225** **84** **▶ 3,570** ships equipped or to be equipped with shore power connections

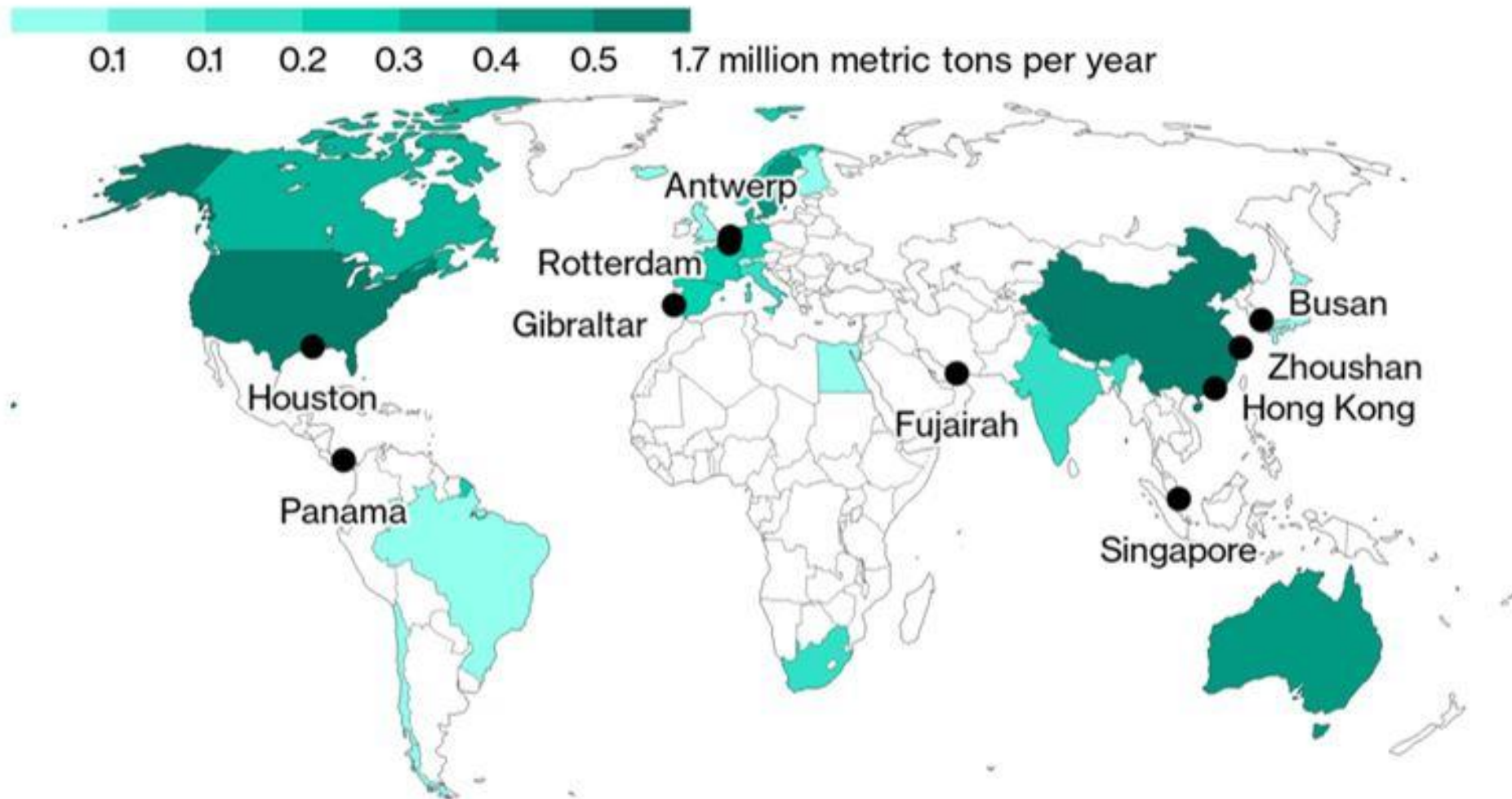
Source: SRM on Clarksons

LNG projects in the world



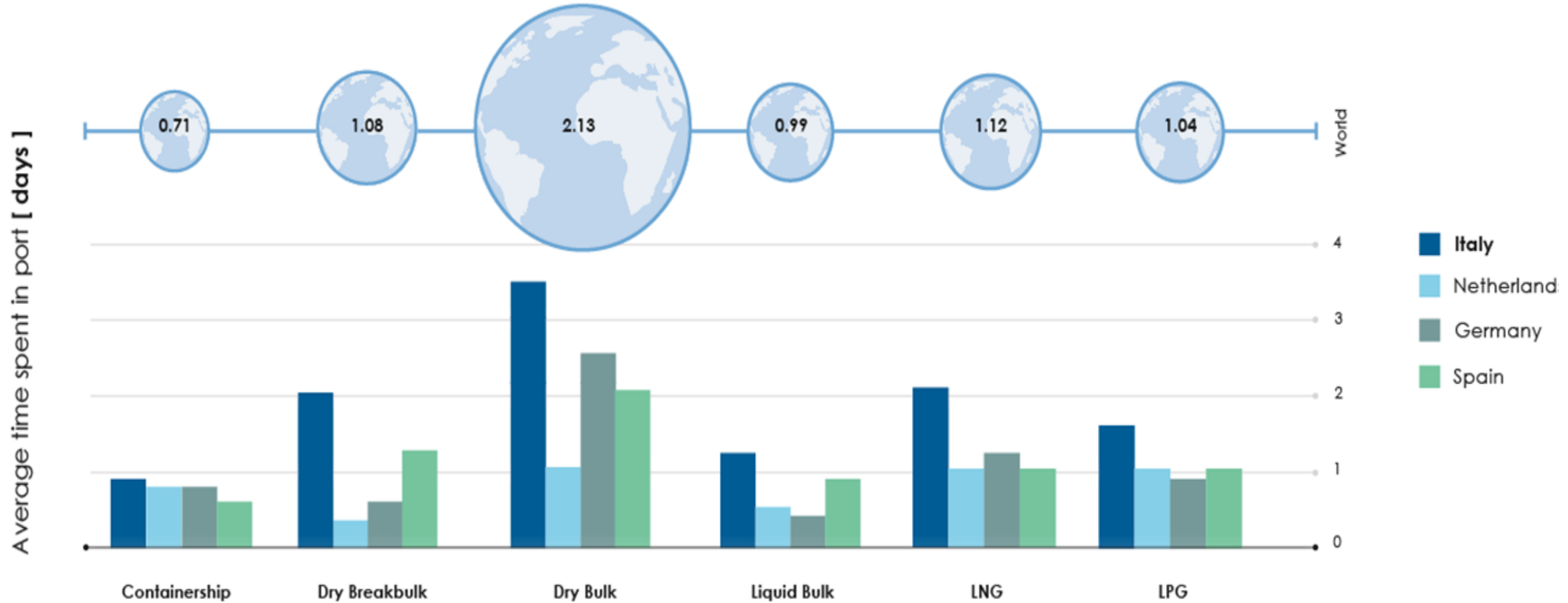
Methanol ports

Figure 4: The world's largest bunkering ports, and 2027 green methanol production capacity by market



Source: BloombergNEF. Note: Data as of July 2023.

Time spent in ports: a new index





Thank you for your attention

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