

Le scénario actuel des SSS en Méditerranée

Lo scenario attuale dei SSS nel Mediterraneo

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Outline

- ✓ Introduction
- ✓ WEST MED: Short Sea Services with non-EU Countries
- ✓ WEST MED: Short Sea Services statistics and trends
- ✓ A focus on the Italy - France area
- ✓ Conclusive remarks



Definitions and tasks of the SSS

Short Sea Shipping (SSS) are services:

- For freight and passengers transport over short distances.
- Integrated in an intermodal system (two or more modes in a door-to-door scheme).
- Between European Countries or with the neighbors
- Concentrate flows on viable, regular, frequent, high-quality and reliable links

The **European Commission** describes short sea shipping as follows: *“short sea shipping includes domestic and international maritime transport, including feeder services, along the coast and to and from the islands, rivers and lakes.”*

Main objectives of SSS (European Commission)

- Reduce road congestion
- Improve access to the States regions and islands
- Improve economy



Next Step in the SSS

Multimodality



Intermodality



Comodality

Efficient use of the different modes of transport alone or in combination, to get a better and sustainable use of the resources.





WESTERN MEDITERRANEAN SHORT SEA SHIPPING

- Several outfitted ports
- Large amount of Intra-European links as well as Europe-North Africa ones.
- SSS services integrated in multimodal logistics supply chains.
- High opportunity for unlocking maritime trade.





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Context: distance matters for trade flows – unlocked potential

The larger the distance between countries, the smaller the trade flows between them ... validity of the Transport Gravitational Theory!

Maritime transport continues to be a barrier to trade.

Three examples:

- Spain exports more to Portugal (7%) are as high as those to Italy (7%) even though the Italian economy is over five times larger than the Portuguese one!
- Spain exports more to Belgium than to Morocco!
- Italy exports more to Switzerland than to all North African countries combined!

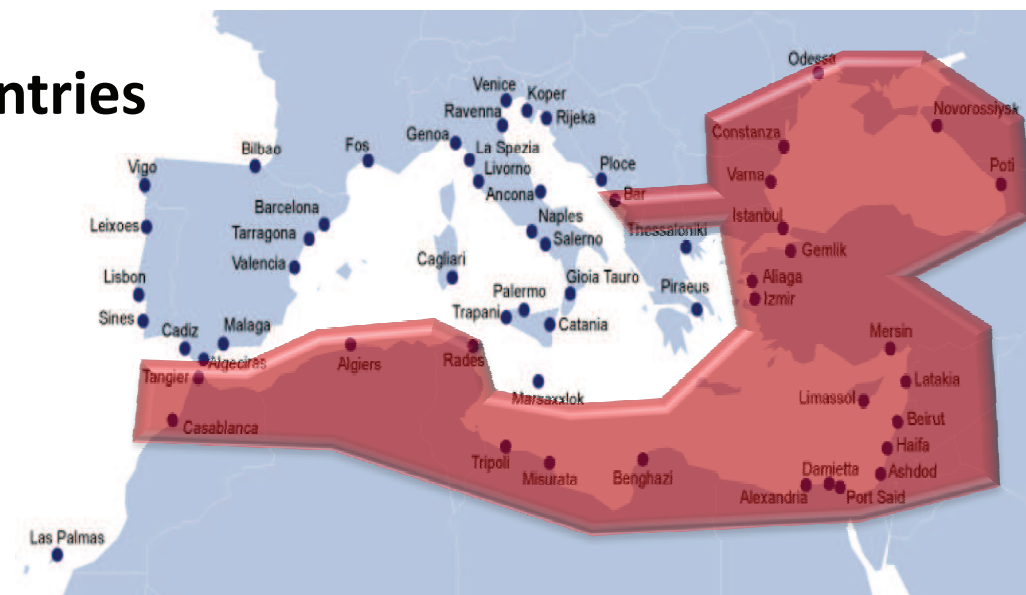
This clearly shows that distance still matters in trade and that maritime transport imposes trade barriers, weighted down by regulatory fragmentation and considerable bureaucratic hurdles.



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Short Sea Services with non-EU Countries

- Focus has traditionally been on intra EU traffics
- Nevertheless there are very important trades with non UE countries in the Mediterranean
- North-South services are strongly demanded by passengers, that may be the basis for new short sea services. Europe-Africa summer migration reached, in 2016, 2,8 million passengers only from Southern Spanish ports (1,9% increase from 2015)
- Automotive and textile industries are moving South, while most of the demand is still from Europe
- Agriculture is also another fast growing trade from South to North





WESTERN MEDITERRANEAN SHORT SEA SHIPPING

Short Sea Services with non-EU Countries – SWOT ANALYSIS

STRENGTHS

- Cultural links, language, native population living in UE.
- Passenger traffics help to achieve profit.
- Small distance from many ports in Mediterranean.

WEAKNESSES

- Custom requirements in UE for Intra European traffics collide.
- Traffic congestion in North Africa facilities for Ro-Ro cargo, and customs better prepared for container traffics.

SWOT

- Market with strong growth; a big difference in wealth increase trade.
- South–South trades will increase in the following years.

OPPORTUNITIES

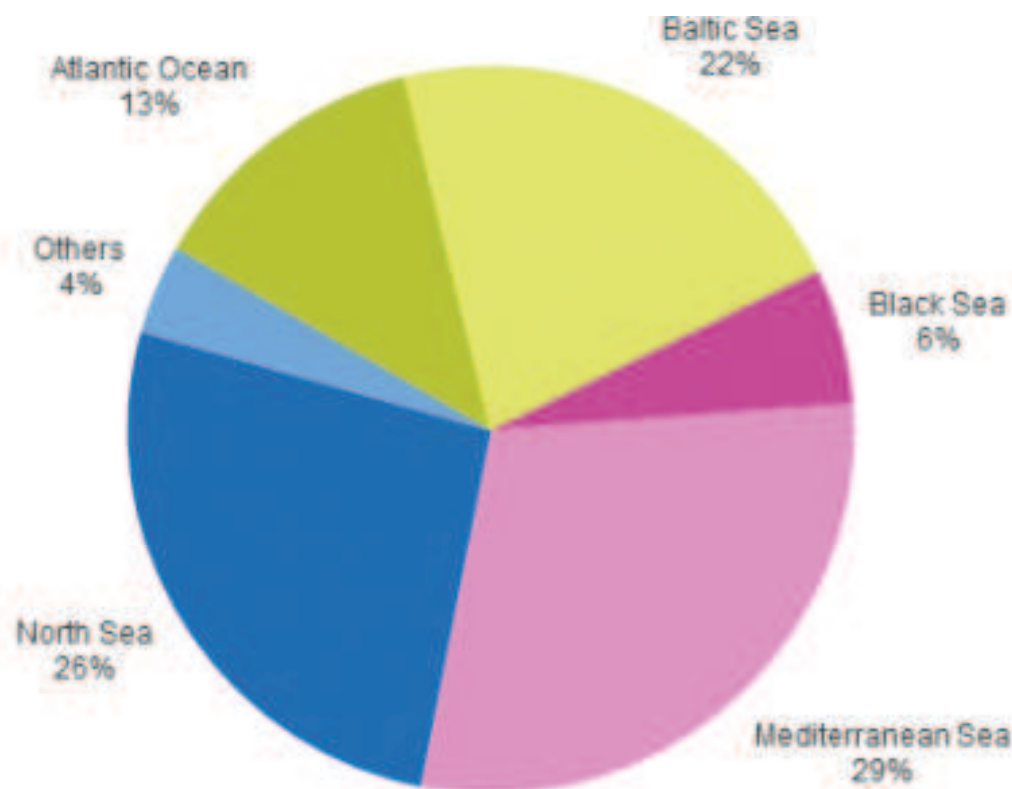
- Political instability of most countries.
- Legal framework not clear and/or stable.
- Terrorism and illegal immigration.

THREATS



WESTERN MEDITERRANEAN SHORT SEA SHIPPING

The largest volume of goods exchanged by SSS in Europe is within the Mediterranean Area.



EU-28 Short Sea Shipping (SSS) of goods by sea region of partner ports in 2015 (in % of total gross weight of goods transported) *Source: Eurostat*