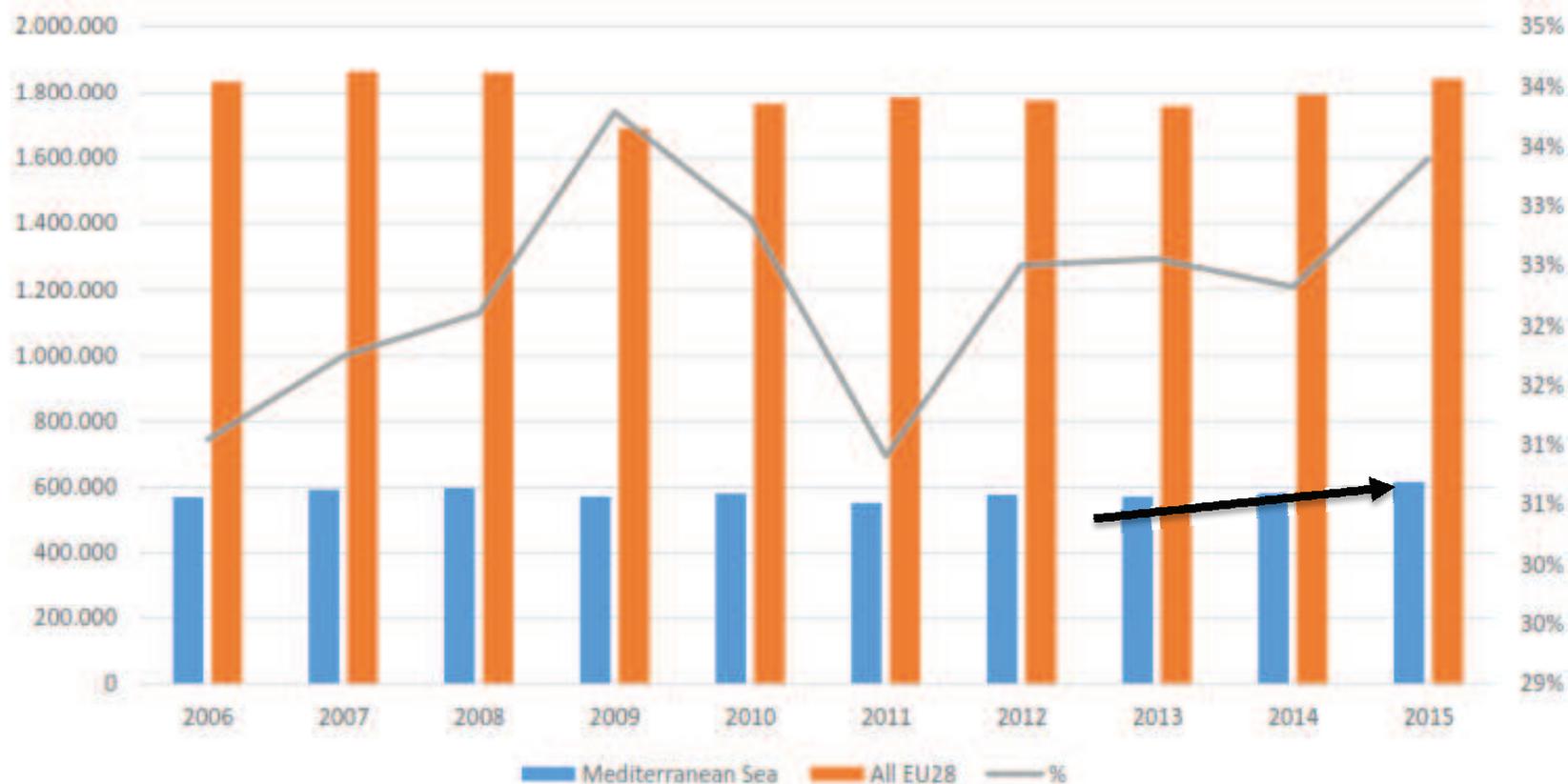
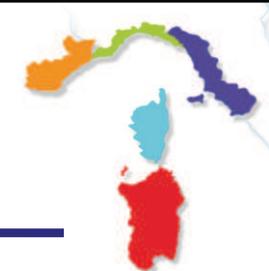


WESTERN MEDITERRANEAN SHORT SEA SHIPPING

In 2015 the Mediterranean area reaches the biggest value.

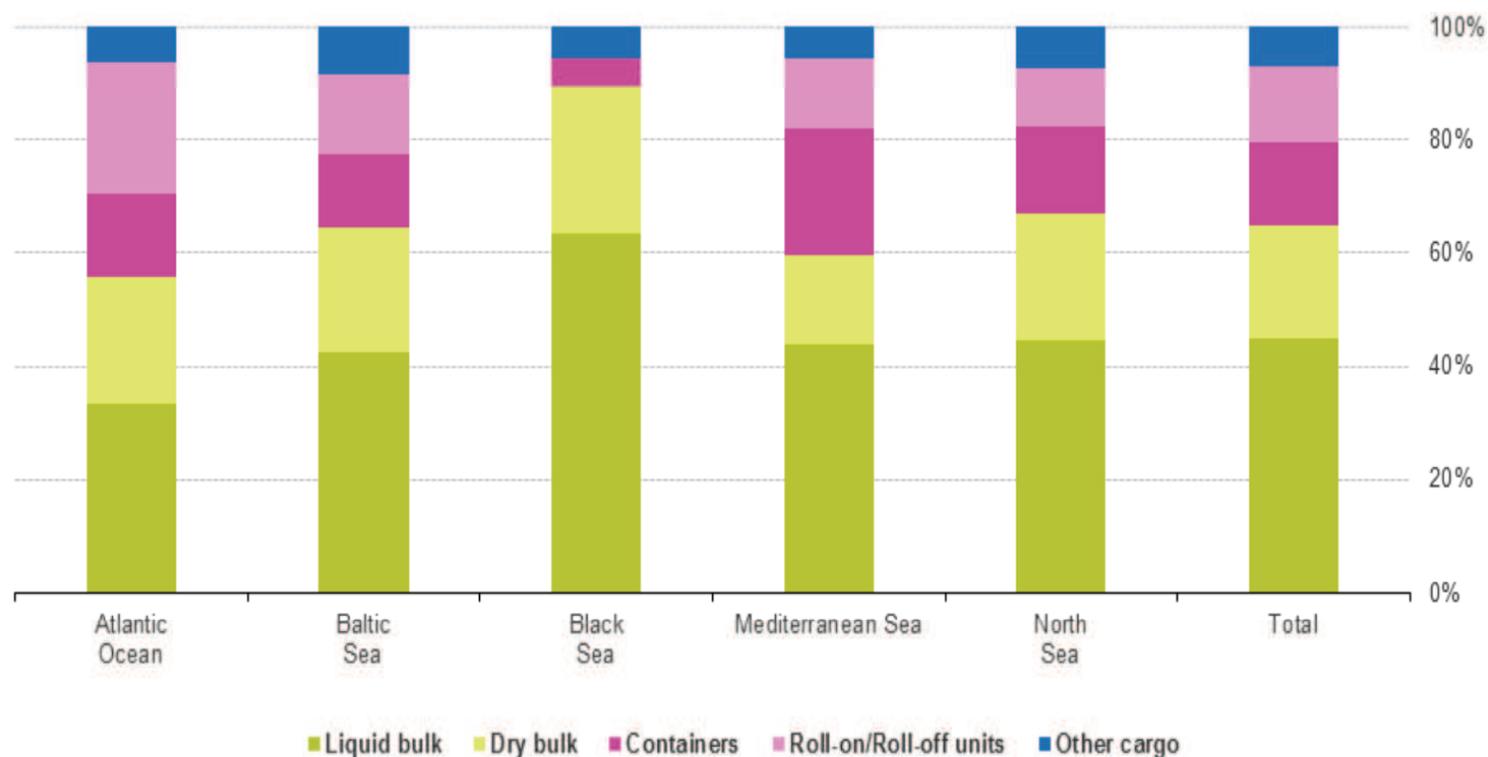


Short Sea Shipping – Mediterranean – Gross weight of goods transported to/from main ports EU28 (Source: Eurostat)

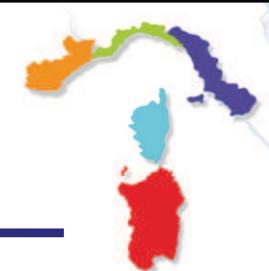


WESTERN MEDITERRANEAN SHORT SEA SHIPPING

The Mediterranean Area has the biggest percentage of goods traffic by Containers (>20%)

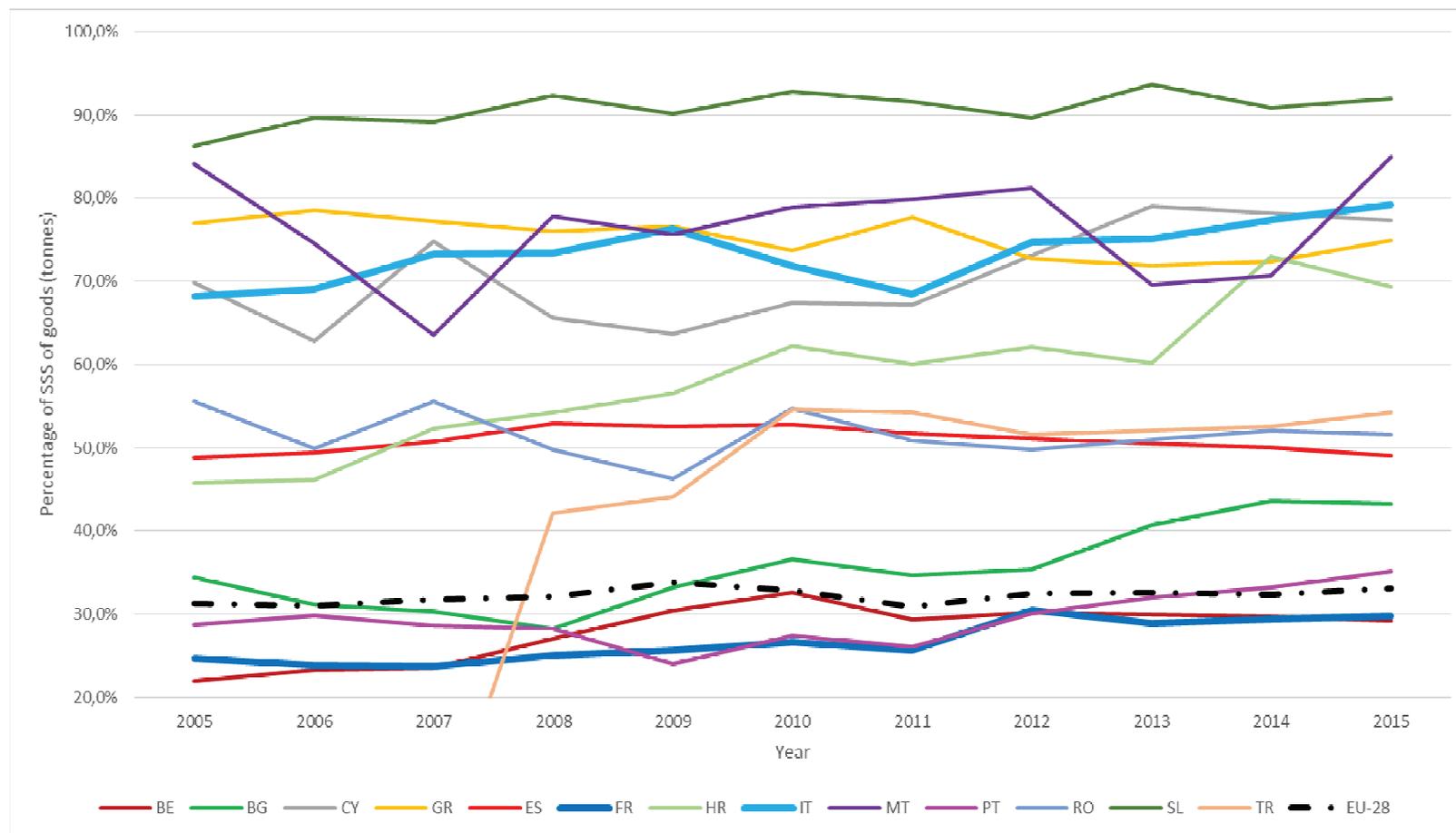


EU-28 SSS of goods by type of cargo for each sea region of partner ports in 2015 (in % of total gross weight of goods transported) *Source: Eurostat*

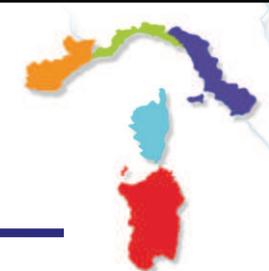


WESTERN MEDITERRANEAN SHORT SEA SHIPPING

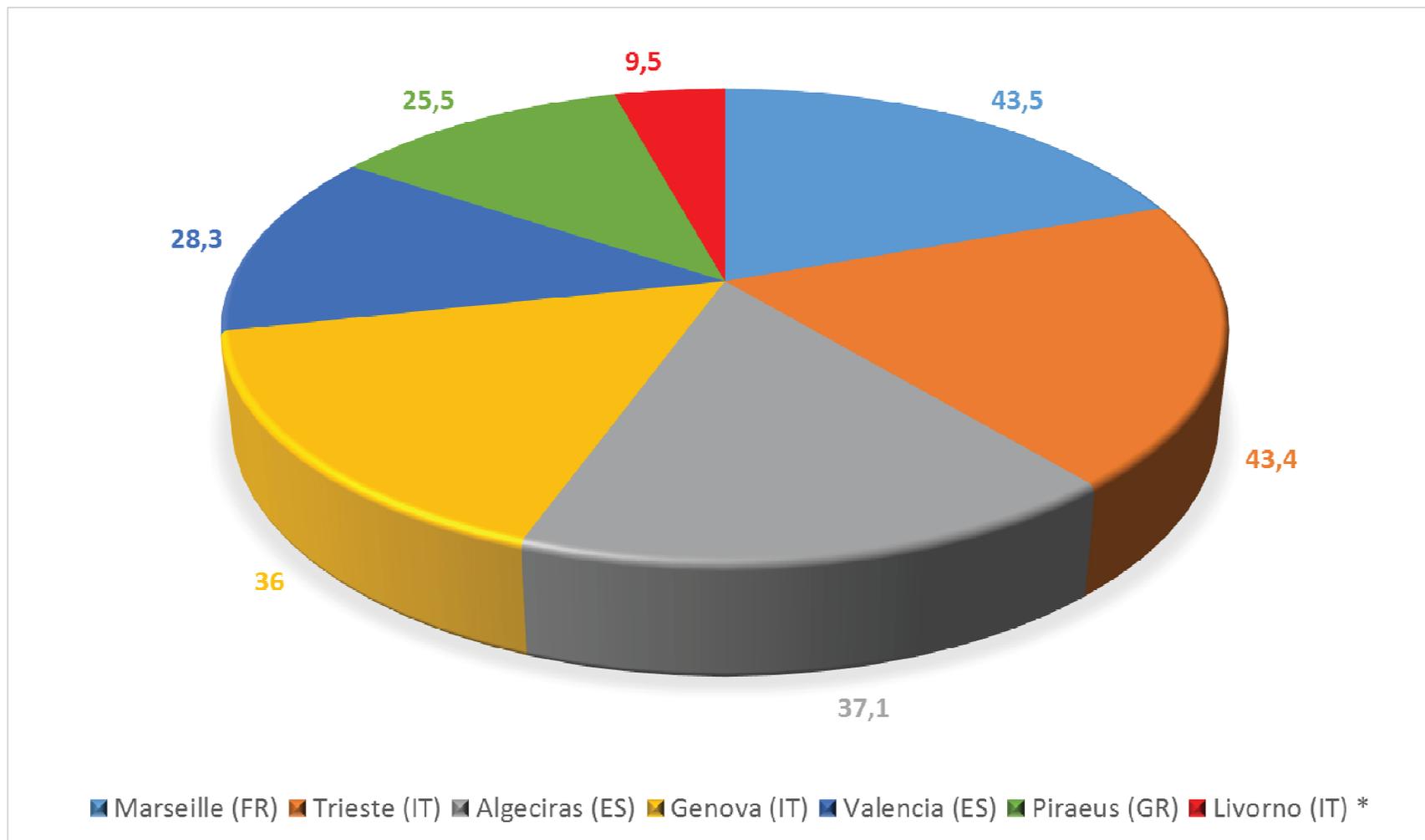
Italy and France shows in the last years a growing trends of goods traffic using SSS.



National Short Sea Shipping (SSS) of goods in Mediterranean ports (in % of total gross weight of goods transported in EU) *Source: Logit Lab elaboration of Eurostat data*



WESTERN MEDITERRANEAN SHORT SEA SHIPPING



Short Sea Shipping (SSS) of goods in Mediterranean major ports (gross weight of goods in Mio tonnes)
 (*for Livorno only Ro-Ro data available) *Source: Logit Lab elaboration of Eurostat and Assoporti data*



WESTERN MEDITERRANEAN SHORT SEA SHIPPING

Short Sea lines:
 Ro-Ro transport, cars and passengers in the **Mediterranean**

The first Ro-Ro operator in the world:



Valencia	Valencia	Barcelona	Barcelona	Barcelona	Barcelona
Livorno	Cagliari	Porto Torres	Livorno	Savona	Tanger
Savona	Salerno	Civitavecchia	Savona		
	Palermo		Valencia		
Daily Departure	3 Departure per week	Daily Departure	3 Departure per week	Daily Departure	1 Departure per week

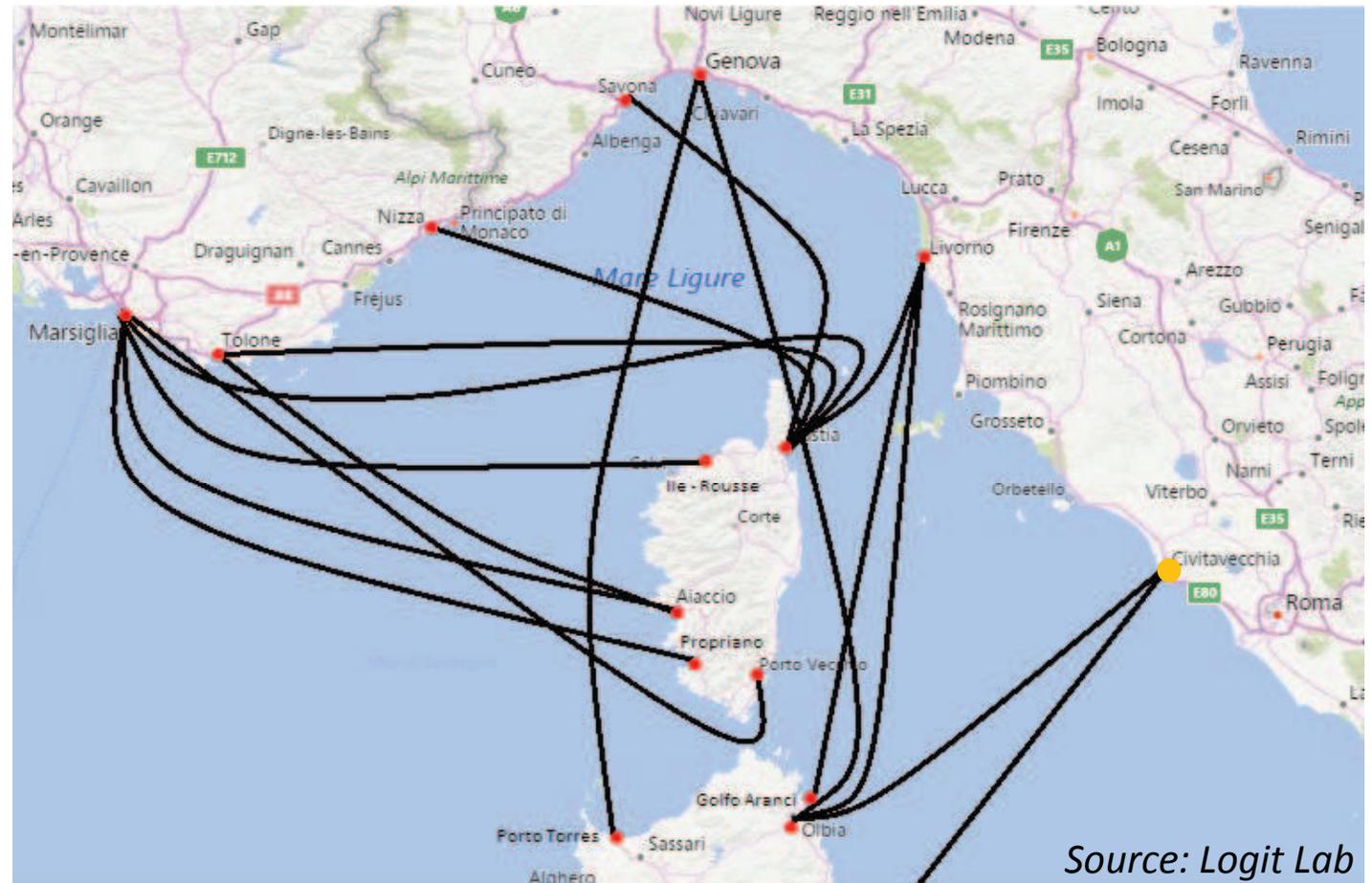
Short Sea Lines: Ro-Ro transport, cars and passengers in the Mediterranean (Source: Grimaldi Commercial Department)



WESTERN MEDITERRANEAN SHORT SEA SHIPPING

A focus on the Italy - France area

Existing routes from north Sardinia and Corsica to Italy and continental France.



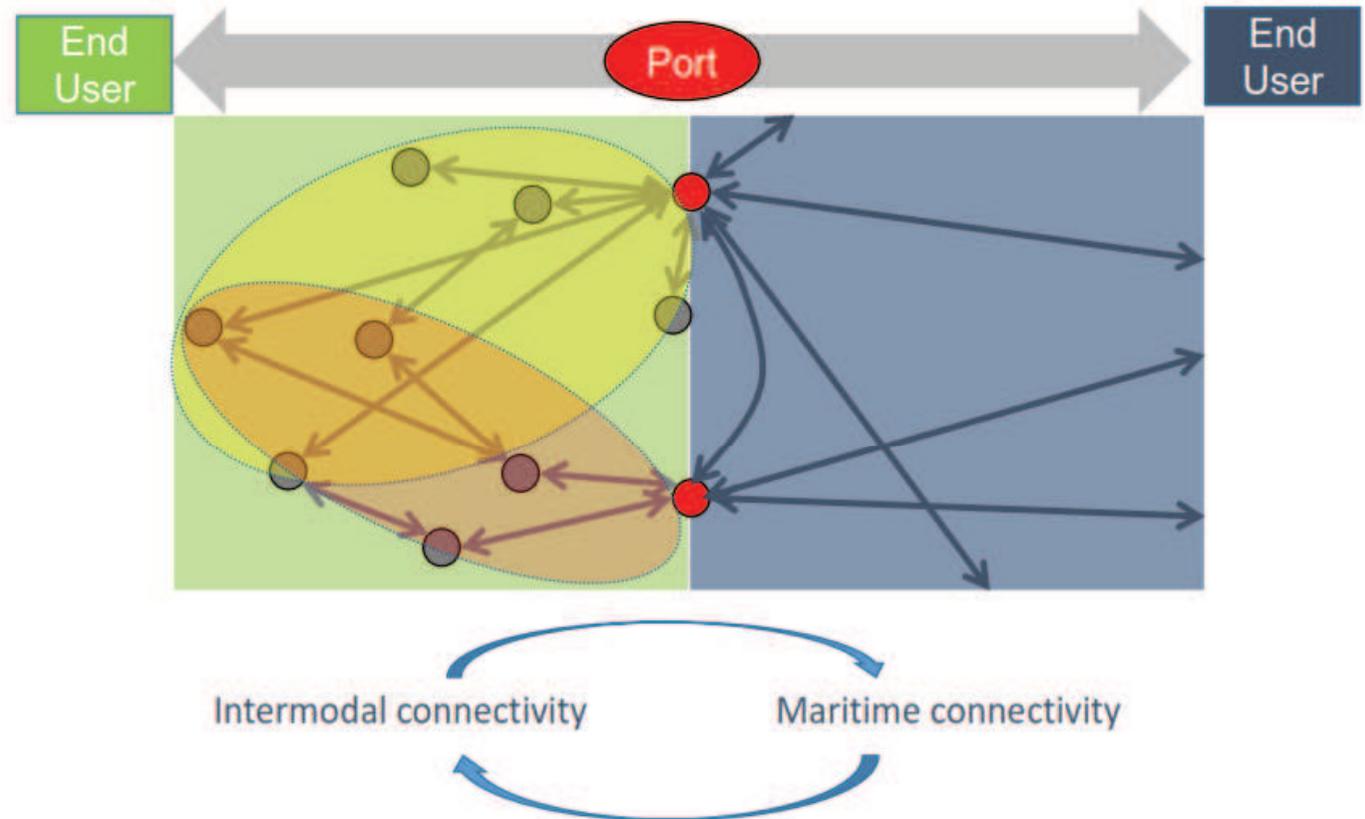


WESTERN MEDITERRANEAN SHORT SEA SHIPPING

An important issue: New Service Development NSD

Creation of new intermodal services is problematic and often unsuccessful:

- Case studies show service developers reluctant to take risks.
- Developers cannot capture 'value for society'.
- Many freight transport companies are focused on operations.
- NSD often requires cooperation, which increases complexity.



Source: Port & Logistics Advisory



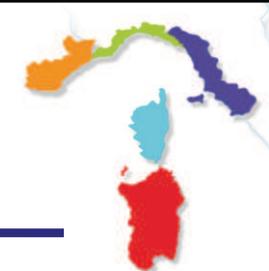
WESTERN MEDITERRANEAN SHORT SEA SHIPPING

Source: ECSA

Favourable (policy) environment for NSD

- New scheduled services create economic & societal value
- Within the EU, freight transport has doubled within 30 years and forecasts suggest an ongoing growth-> increasing road congestion and environmental concerns
- Intermodal & shortsea transportation: alternative to road transport (and potential source of competitive advantage for shippers / ports / countries)
- Regional and national policymakers and companies:
 - promote initiatives
 - set transport mode shift goals
 - provide financial assistance and invest in intermodal transport





Le scénario actuel des SSS en Méditerranée

Lo scenario attuale dei SSS nel Mediterraneo

Grazie
Merci

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