



# [ Mediterranean Ports ]

maritime  
economy

2016

## ***"Mediterranean Ports"***

### ***the New Publication by SRM and Assoport***

### ***Starts with this Issue***

Our goal is to highlight data, statistics and analysis on the competitiveness of the Mediterranean port system, a sea that houses around 19% of worldwide traffic and where many port and logistics infrastructures are undergoing a strengthening process.

Tanger Med and Piraeus, as the data is going to show, are the ports currently trying to achieve a leadership position in the Mare nostrum, although Turkish and Spanish ports (currently leading in terms of container throughput) are certainly not being idle.

Italy is going through a crucial period in its port economy, with an upcoming reform adding some significant innovation to the governance and organization of port structures, as well as many infrastructures pushing to implement important investments.

Maritime and port competition in the Mediterranean does not seem to stop, with the Mega-ships phenomenon not showing any sign of hesitation; the opening of the new Suez Canal and the imminent inauguration of the Panama Canal on the 26<sup>th</sup> of June are the new challenges which the Mediterranean – actually, the Mediterranean ports – will have to face, preparing to fully grasp the new arising trade flows.

The well-established role of the Northern Range ports is also part of the picture, having always been the main players on the worldwide trade scenario.

This newsletter aims to offer an overview to the operators on the Mediterranean and on the meaning of the port dynamics developing in its wake. And Italy is on the frontlines, striving to achieve a clear and solid development of its ports and of the system connected to them.

Analysis and data are corroborated by interviews conducted with the main players of international port systems. In this issue we have: Eamonn O'Reilly (Chief Executive at Dublin Port Company) and Santiago Garcia-Milà (Deputy Director General of Barcelona Port Authority).

...This is how the synergy between SRM and Assoport should be interpreted.

**"Mediterranean Ports" is a six-monthly analysis included in SRM's Observatory on Maritime Transport and Logistics. This publication is the result of a partnership between SRM and Assoporti. It is available on: [www.srm-maritimeconomy.com](http://www.srm-maritimeconomy.com) and [www.assoporti.it](http://www.assoporti.it)**

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**SRM & Assoporti - Mediterranean Ports**

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# Global Maritime News

MARCH 2016

**Panama Canal Authority Fixes the Expansion Inauguration Date on 26<sup>th</sup> June 2016**  
23<sup>rd</sup> March 2016

**Italian Port Reform Unanimous Support From the Conference of Regions**  
31<sup>st</sup> March 2016

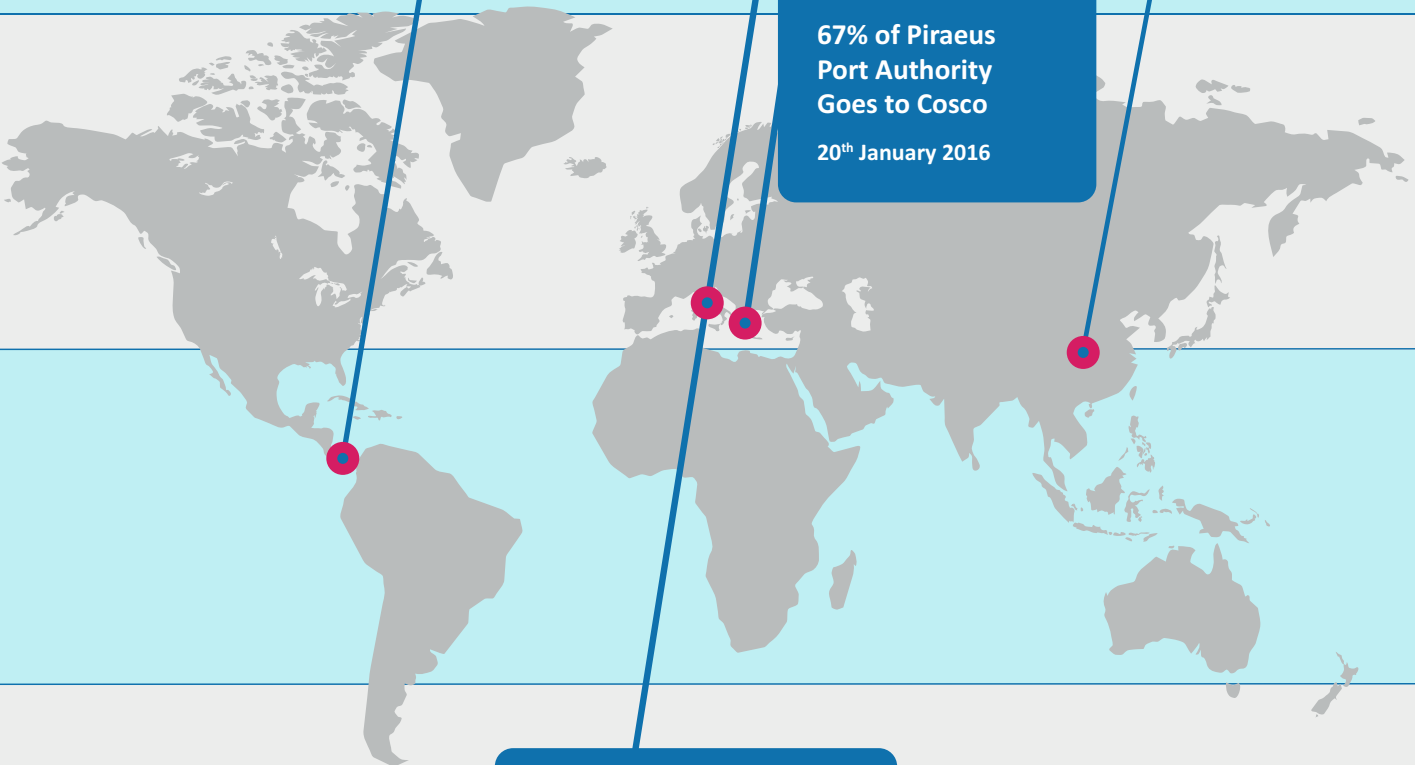
FEBRUARY 2016

**Coscocs Reveals Its Plans until 2018**  
22<sup>nd</sup> February 2016

JANUARY 2016

**67% of Piraeus Port Authority Goes to Cosco**  
20<sup>th</sup> January 2016

DECEMBER 2015



NOVEMBER 2015

**Italy's NOP Infrastructure Plan (2014-2020) Calls for €1.84bn in Spending**  
6<sup>th</sup> November 2015

# Global Maritime News

## 31<sup>st</sup> March 2016

### Italian Port Reform: Unanimous Support.

There was unanimous support for the reform of the port system in Italy. The main points of the Ports Decree are: i) the abolition of the port authorities and the reorganization of the ports into strategic decision centers managed by *Port System Authorities*, ii) the simplification of the procedures for passenger and cargo transit, and iii) central coordination under MIT. According to the reform, Italian ports will be reorganized into 15 *Port System Authorities* (“PSA”) based in the Italian “core” ports. These are Genoa, La Spezia, Livorno, Civitavecchia, Cagliari, Naples, Palermo, Augusta, Gioia Tauro, Taranto, Bari, Ancona, Ravenna, Venice and Trieste. The new PSA will be in charge of 54 national ports. With the latest amendments, it’s possible for regional presidents to request a *36-month moratorium on particularly complex mergers*. The local regional authorities can ask that additional ports of regional importance be included in the PSA. Now the reform is under the examination of specific parliamentary committees before the final approval that is expected by Summer 2016.

Source: Ship2Shore

## 23<sup>rd</sup> March 2016

### Panama Canal Authority Announces the Expansion Inauguration Date.

The Panama Canal Expansion will be officially inaugurated on **Sunday, June 26, 2016**. The announcement was made during the inauguration ceremony of the Canal's state-of-the-art Scale Model Maneuvering Training Facility, which will provide additional hands-on experience to pilots and tugboat captains to operate in the Expanded Panama Canal. The project will create a new lane of traffic along the Canal through the construction of a new set of locks, doubling the waterway’s capacity. The existing locks allow the passage of vessels that can carry up to 5,000 TEUs. After the expansion the Post-Panamax vessels will be able to transit through the Canal, with up to 13,000/14,000 TEUs. The Expansion will double the Canal’s capacity.

Source: Canal de Panamá

## 22<sup>nd</sup> February 2016

### Coscocs Reveals Its Plans until 2018.

China's biggest shipping line China Ocean Shipping Corporation (Coscocs) revealed its ambitious plan to increase its container shipping capacity to hit a 2 million TEUs over the next three years. Coscocs owns 1.58 million TEUs, ranking fourth out of the world's container shipping operators, behind Maersk Line, Mediterranean Shipping Company and CMA CGM.

Source: Marinelink.com

## 20<sup>th</sup> January 2016

### 67% of Piraeus Port Authority Goes to Cosco.

The Hellenic Republic Asset Development Fund (HRADF) announced that it has accepted a bid of €368.5m for a 67% equity share in the Piraeus Port Authority S.A. (OLP) from Hong-Kong based Cosco Group. That means that one of the main 'transshipment ports' of the Mediterranean belongs to China.

Source: The Meditelegraph

## 6<sup>th</sup> November 2015

### Italy's NOP Infrastructure Plan (2014-2020) Calls for €1.84bn in Spending.

Italy's NOP Infrastructure Plan (2014-2020) was presented in Naples by Graziano Delrio (Italy's Minister of Infrastructure and Transport) and Corina Cretu (European Commissioner for Regional Policy). The plan calls for €1.84bn in spending, with €1.38 billion coming from the European Regional Development Fund and a co-financing deal worth €460.9 million euros (25% of the total). The plan's general objective is to "promote sustainable transport systems and eliminate bottlenecks on the central network infrastructure." Over 37% of the funding (€684m) is devoted to the improvements of ports, dry ports and logistical hubs. Investments will be concentrated on 5 regions (Basilicata, Calabria, Campania, Puglia and Sicilia) and 5 logistics areas: Campania system, Puglia system, logistics hub of Gioia Tauro, East-Sicilia and West-Sicilia. A major boost will be given to technology, innovation and the development of smart transport systems.

Source: Italy's Ministry of Infrastructure and Transport

## IN THIS ISSUE...

### Interview with Eamonn O'Reilly, Dublin Port Company

"Dublin is a gateway port for an island economy with very large international trade in goods (valued at more than 80% of the country's GDP).

Having seen growth of 17.3% in the three years to 2015, we expect continued large growth in the years ahead. Our major strategic challenge, therefore, is to provide additional port capacity for the port's private sector cargo handling operators" ... **p. 33**

### Interview with Santiago Garcia-Milà, Barcelona Port Authority

"The Port of Barcelona ended 2015 with positive results in its key traffic indicators, with record figures in foreign trade and certain strategic cargo segments such as vehicles and motorways of the sea. Containers are a key traffic and a good barometer of the economic environment, and the Port registered 2 million TEU, up 4% year on year. This growth was even higher if taken only in terms of foreign trade. Export containers at the Port of Barcelona increased by 6.5%, while on the import side there was year-on-year growth of 9%.

... In 2015, and most importantly, we also launched our Third Strategic Plan which sets the Port of Barcelona's strategic objective: to become the main euro-regional distribution centre in the Mediterranean competing with the ports of Northern Europe" ... **p. 36**

# Six-Month Outlook

## ▶ Maritime Trade between Italy and the Mediterranean: stable in 2015

- The Mediterranean continues to represent a very important area for Italy's trade relations. In 2015, maritime trade between Italy and Mediterranean countries (EU countries excluded) amounted to **€50.7bn**, a value similar to that recorded in 2014. An increase of 65.7% was recorded compared to 2000.
- The weight of maritime trade from Italy's total trade with the Mediterranean area is **76.2%**.
- **Turkey** continues to be Italy's first Mediterranean trading partner (with €11.4bn of maritime trade between the two countries in 2015; +9.3% on 2014); It is followed by Saudi Arabia, Tunisia, Algeria and Egypt.
- Exports showed better dynamics: Italy's maritime exports to the Mediterranean area were **€31.4bn** in 2015 (**up 3.7%** compared to 2014).

## ▶ Maritime Trade with the Mediterranean: Italy is still first among European countries

- Among European countries, Italy, with **€50.7bn**, recorded the highest value of maritime trade with the Mediterranean, followed by Germany (€45.7bn) and France (€42.1bn).
- As for the 'quantity' (tons) traded, Italy's trade with the Mediterranean amounted to **57.9m tons** in 2015 (a **10% increase** compared to 2014). This confirms Italy as a leader in EU-Mediterranean maritime trade relations.

## ▶ Maritime Trade with the Mediterranean: Southern Italy first in terms of trade; the North West first in terms of exports

- Among the four Italian macro-regions, **Southern Italy** recorded the highest value of maritime trade with MENA (**€16.2bn**) in 2015. While, in 2015 Southern Italy and the North-West recorded a decrease in sea-borne trade relations with MENA countries (respectively, -14.0% and -1.7%), there was an increase as for North East (+5.7%) and Central Italy (+5.8%).
- In 2015, **seaborne exports** to MENA increased for Central Italy and the North Est, while it was almost stable for the **North West** and Southern Italy. The North West continues to play a leading role, with **€9.8bn** of exports in 2015.
- Maritime trade has a growing and very important role in the trade between Southern Italy and MENA countries: it made up **98.5%** of total trade in 2015, a stable percentage compared to 2014. Lower (but still important) percentages for the other Italian macro-regions.
- In 2015, **Lombardia**, with €10.5bn (-0.6% compared to 2014), retained its primacy in maritime trade with MENA countries, followed by Sicilia (€8.2bn; -20.1%) and Sardegna (€5.0bn; -12.6%).



## ► **Competitiveness and Structure: Italy is among the top 20 countries for 'maritime connectivity', 'logistics competitiveness' and 'container port throughput'**

- In 2015, Italy ranked **17<sup>th</sup>**, by maritime connectivity, with an **LSCI (Liner Shipping Connectivity Index)** of **67.4**, a slight decrease compared to 2014, but with a 10 points increase compared to 2004, when the index was 58.1. Germany and the Netherlands show a higher LSCI.
- In 2015, Italy ranked **20<sup>th</sup>** by logistics competitiveness, with an **LPI (Logistics Performance Index)** of 3.69 and an increasing performance compared to 2007 when the index was 3.58.
- In 2014, Italy ranked **15<sup>th</sup>** by container port throughput, with **11.3 million TEUs** (1.7% of world's total), a 2.7% increase compared to 2013 (11.0). Germany's (19.7 million TEUs), Spain's (14.7) and the Netherlands' (12.5) container port throughput in 2014 was still higher than Italy's.

## ► **Short Sea Shipping: Italy is the leader in the Mediterranean**

- As for **Short Sea Shipping (SSS)**, in 2014, Italy, with about **262 million tonnes** (a slight decrease compared to 2013), was 3<sup>rd</sup> among European countries, after The Netherlands and the United Kingdom.
- Among the EU28, Italy is first for **Short Sea Shipping in the Mediterranean Sea**, with **203 million tonnes** of goods transported (35% total SSS in the Mediterranean) in 2014.

## ► **Mediterranean ports: Tanger Med's (Morocco) and Ambarli's (Turkey) share in the growth**

- **Valencia** (Spain), **Algeciras** (Spain) and **Port Said** (Egypt) continue to be the three most important Mediterranean ports, each with more than 3 million TEUs handled in 2015. Of these three, Valencia is the only one that recorded an increase of container throughput compared to 2014.
- With reference to the main Italian ports, in 2015, **Gioia Tauro** handled about **2.5 million TEUs** (a **14.1% decrease** compared to 2014), **Genoa 2.2 million** (+3.2%) and **La Spezia 1.3 million** (-0.2%). Livorno (780 thousand TEUs; +35.2%), Venice (560 thousand, +22.9%) and Salerno (359 thousand; +12.3%) were those with the highest growth in 2015.
- In the long run, **Tanger Med** (Morocco) moved from 1 million TEUs in 2008 to almost 3 million TEUs handled in 2015; **Ambarli** (Turkey) from 1.2 million TEUs in 2005 to 3.1 million TEUs in 2015. Among the Italian Ports, **Trieste** (+152.8%) and **Venice** (93.3%) registered the best performances in the period considered.
- All this has brought a change in the Mediterranean ports' "market share". **Tanger Med's share** grew from 0% in 2005 to 11% in 2015, **Port Said's** from 10 to 14%, **Piraeus'** from 9% to 13% Valencia's from 16% to 18%.

# Maritime Trade Flows in the Mediterranean: Italy and Its Major European Competitors

## Maritime Trade between Italy and Mediterranean<sup>1</sup> Countries

In 2015, **maritime trade** between Italy and Mediterranean countries amounted to **€50.7bn**, a value similar to that recorded in 2014. Over the last fifteen years it has increased by about €20bn, despite the sharp slow-down observed since 2012. Turkey continues to be Italy's first Mediterranean trading partner (with €11.4bn of maritime trade between the two countries in 2015; +9.3% on 2014); It is followed by Saudi Arabia and Tunisia, with which Italy recorded a decline in maritime trade relations between 2014 and 2015. On the contrary, trade relations between Italy and the United Arab Emirates (UAE) improved strongly in 2015.

Italy's **maritime exports** to the Mediterranean area were €31.4bn in 2015 (up 3.7% compared to 2014). An increase was recorded in Italy's exports to most of the countries analysed, in particular, to the UAE (+ 25.9%).

### Maritime Trade between Italy and the Mediterranean Area

€bn; 2000-2015.

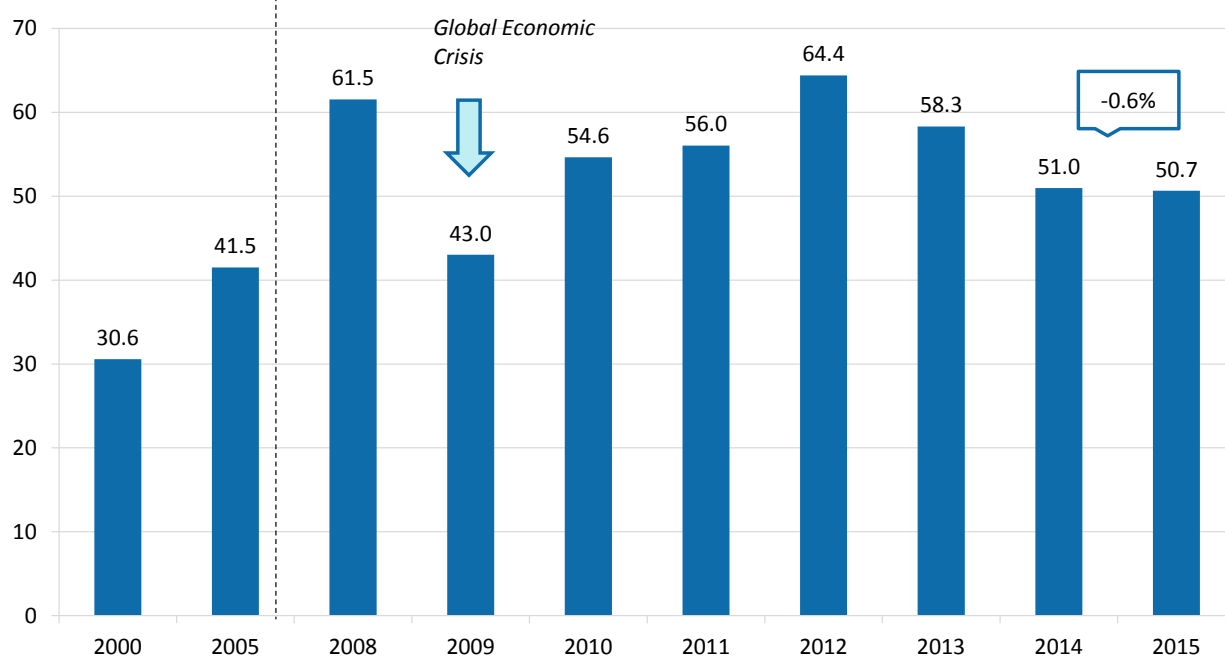


Figure 1 - Source: SRM elaboration on Eurostat data

<sup>1</sup> Mediterranean area defined and used by SRM for the realization of its studies. It includes the following countries: **Southern Mediterranean Countries** (Algeria, Egypt, Israel, Jordan, Libya, Lebanon, Morocco, Syria, Tunisia, Turkey); **Gulf Cooperation Council (GCC) Countries** (Oman, Bahrain, Kuwait, Qatar, Saudi Arabia, United Arab Emirates).

### Maritime Trade between Italy and Each Mediterranean Country

€bn; 2014-2015.

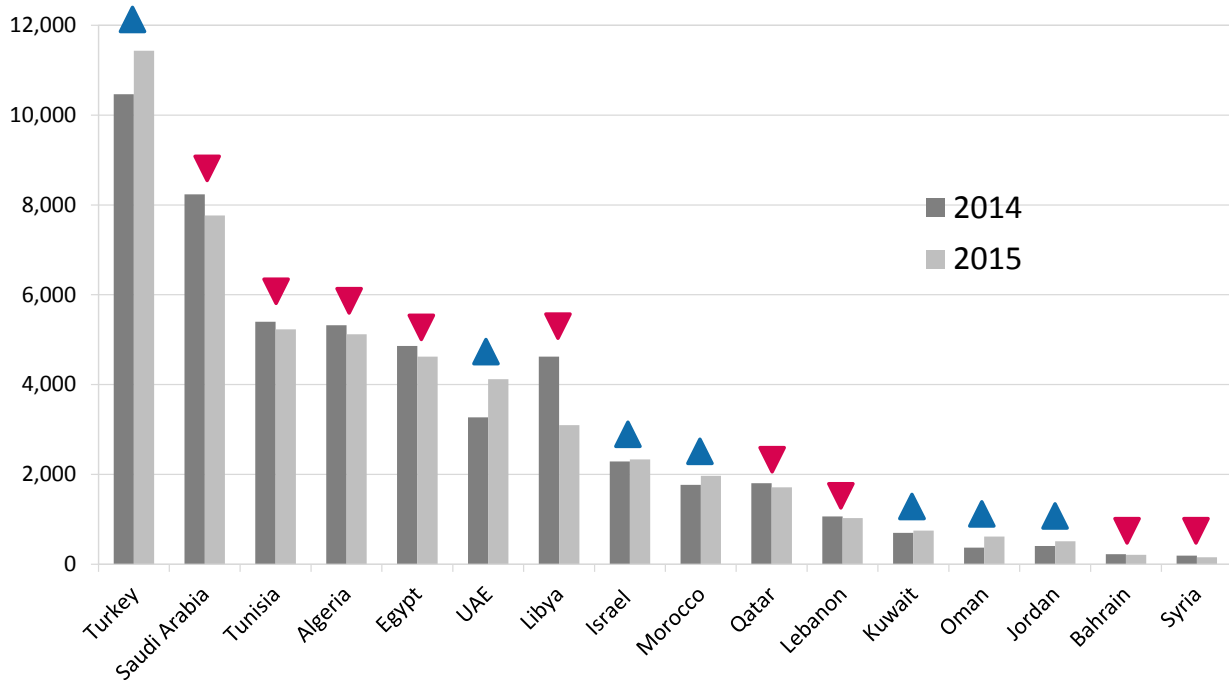


Figure 2 - Source: SRM elaboration on Eurostat data

### Italy's Exports to Each Mediterranean Country

€bn; 2014-2015.

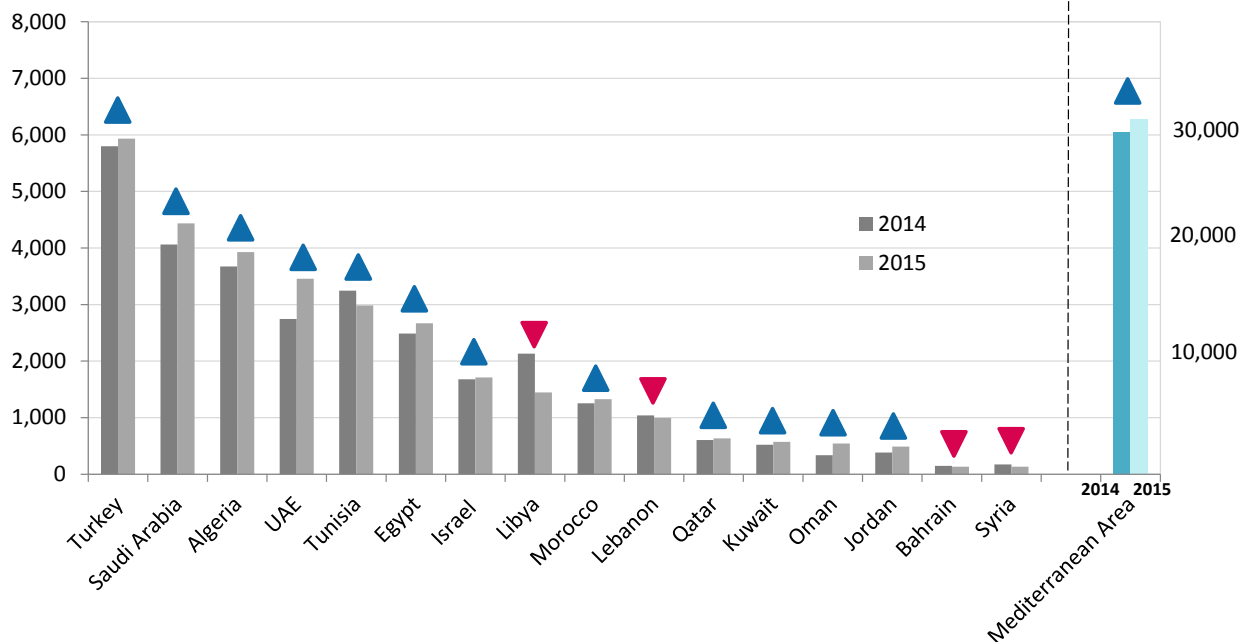


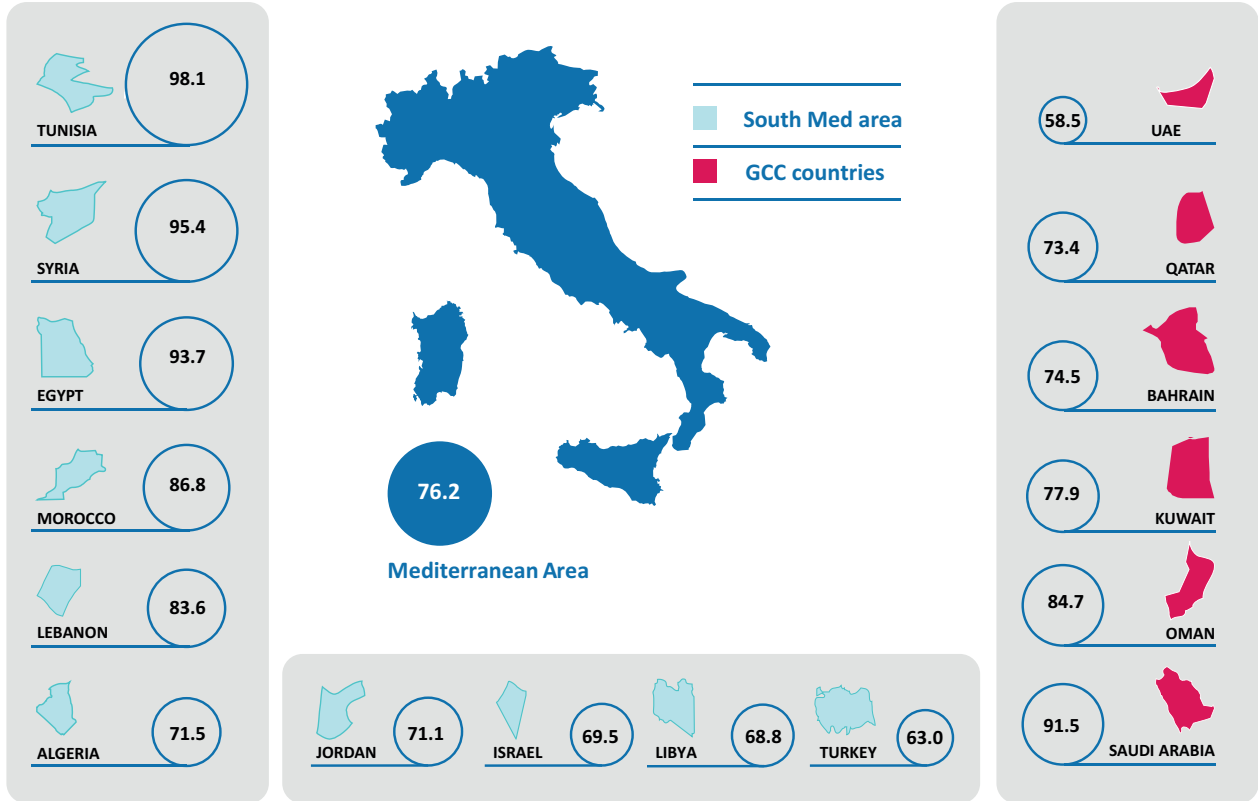
Figure 3 - Source: SRM elaboration on Eurostat data

The weight of maritime trade from Italy's total trade with the Mediterranean area is 76.2%. This is even higher and exceeds 80% in Italy's trade with Tunisia, Syria, Egypt, Morocco, Saudi Arabia and Oman. With reference to Italy's exports to Southern Mediterranean Countries, the share of seaborne exports (78.4%) is

higher than the share of seaborne imports (72.5%). As for the GCC, the opposite occurs: maritime exports make up 70.1% of the total, while maritime imports account for 91.7% of the total.

### The Weight of Maritime Trade from Italy's Trade with Mediterranean Countries

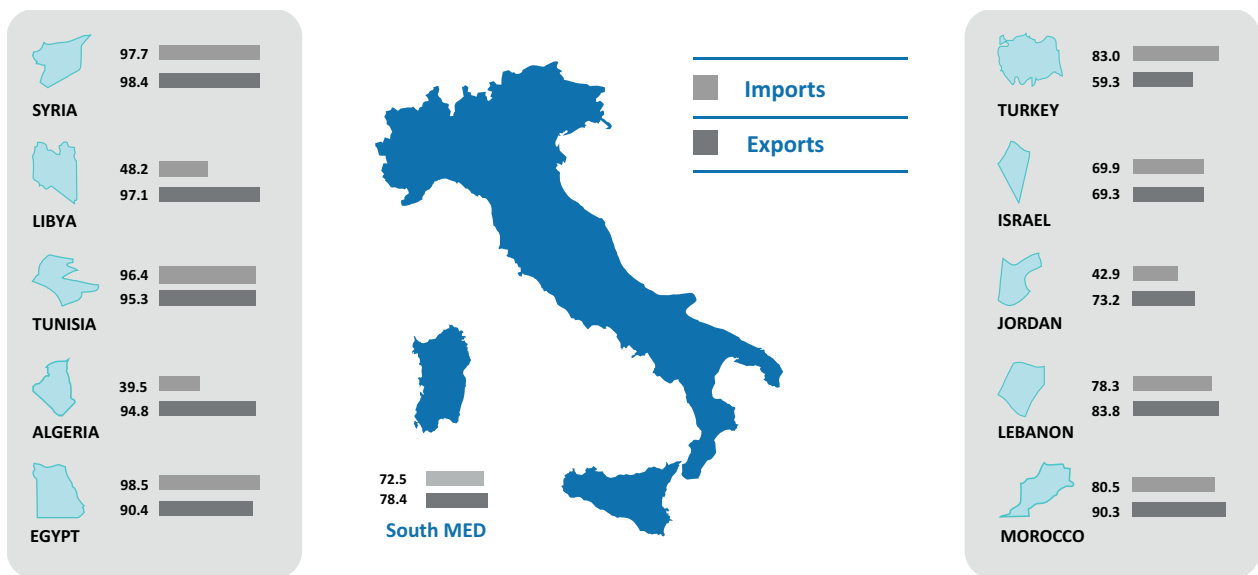
Maritime trade: % of total trade between Italy and each country.



Infographic 1 - Source: SRM elaboration on Eurostat data

### The Weight of Maritime Trade from Italy's Trade with Southern Mediterranean Countries

Maritime imports: % of Italy's total imports from each country.  
 Maritime exports: % of Italy's total exports to each country.



Infographic 2 - Source: SRM elaboration on Eurostat data

## The Weight of Maritime Trade from Italy's Trade with Gulf Cooperation Council (GCC) Countries

Maritime imports: % of Italy's total imports from each country.

Maritime exports: % of Italy's total exports to each country.



Infographic 3 - Source: SRM elaboration on Eurostat data

## Maritime Trade in the Mediterranean: the Role of the Main European Countries

European countries have historically had strong maritime trade relations with the countries located in the Mediterranean rim. Italy continues to play a leading role: in 2015 maritime trade between Italy and the Mediterranean area was **€50.7bn**, higher than that recorded by Germany (€45.7bn) and France (€42.1bn). 2015 was not the strongest year for *EU countries-Med countries* trade relations: aside from Germany, all the other EU countries considered in the analysis recorded a fall, though slight, in their seaborne trade with the Mediterranean.

The maritime sector is an important part of *EU countries-Med countries* trade relations. The share of maritime trade in total trade relations is particularly high for Greece (82.4% recorded in 2015) and Italy (76.2%). As for the 'quantity' (tons) traded, Italy's trade with the Mediterranean amounted to **57.9m tons** in 2015 (a 10% increase compared to 2014). This confirms Italy as the leader in EU-Mediterranean maritime trade relations.

It's interesting to observe the '**average value**' of the goods traded in bilateral relations. As for Italy, every ton of goods exported by sea is worth 1,250 Euros, about twice the value of the imported goods. Italy ranks third among the EU countries analysed, after Germany (€2,800) and France (€1,250).

## Maritime Trade with the Mediterranean

Italy and its main EU competitors; €bn; 2000-2015.

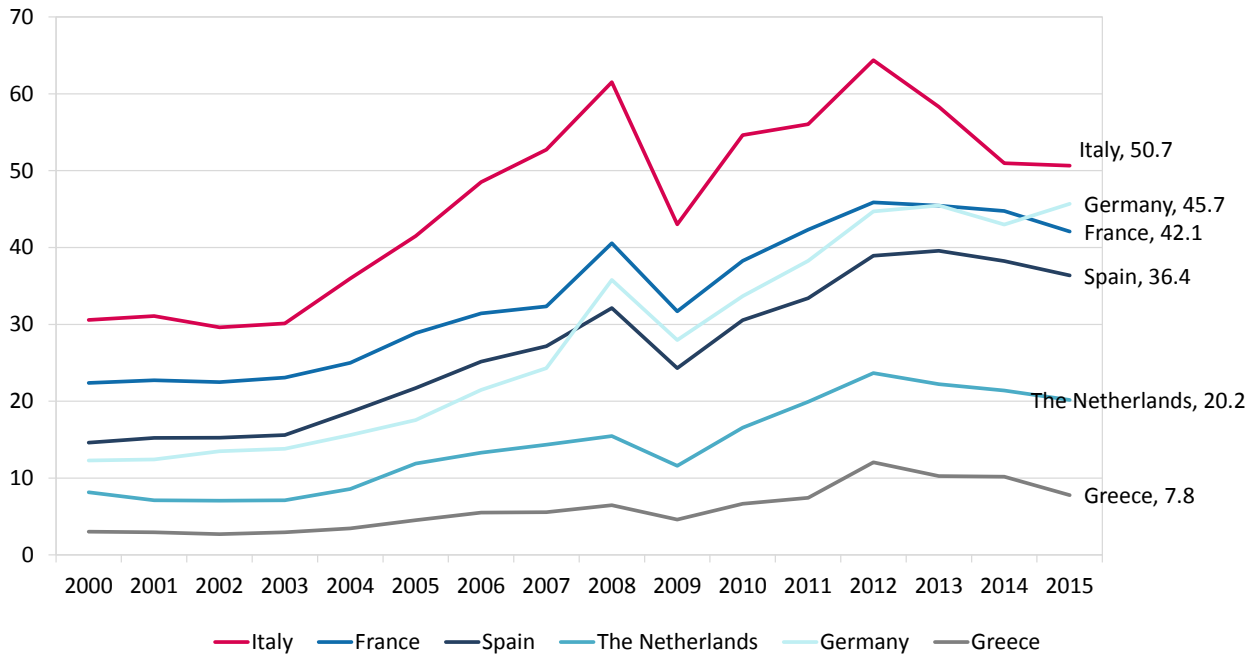
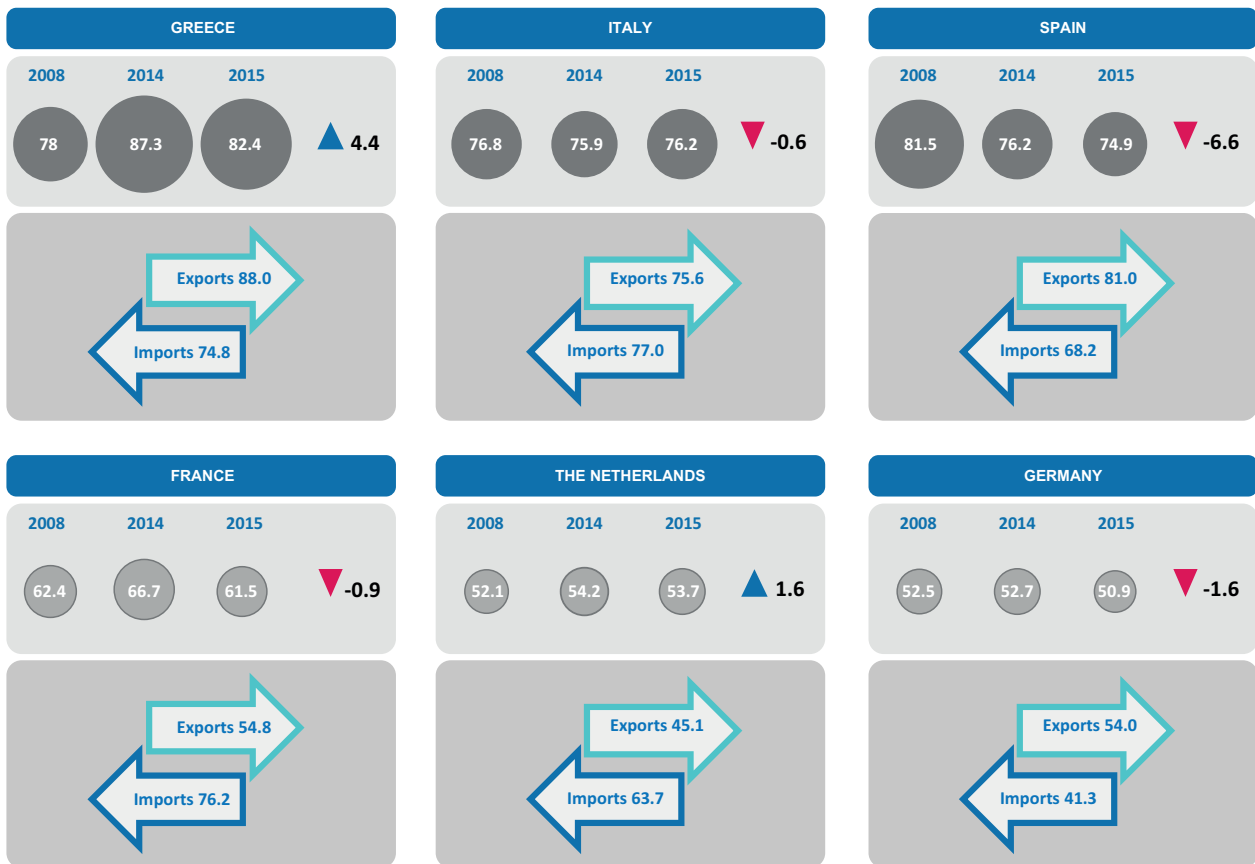


Figure 4 - Source: SRM elaboration on Eurostat data

## The Weight of Maritime Trade from the Trade with Mediterranean Countries

Maritime trade: % of total trade; 2008-2015.

▲ % Change 2008-2015



Infographic 4 - Source: SRM elaboration on Eurostat data

### Maritime Trade with the Mediterranean Area (Quantities)

Italy and its main EU competitors; millions of tons; 2000-2015.

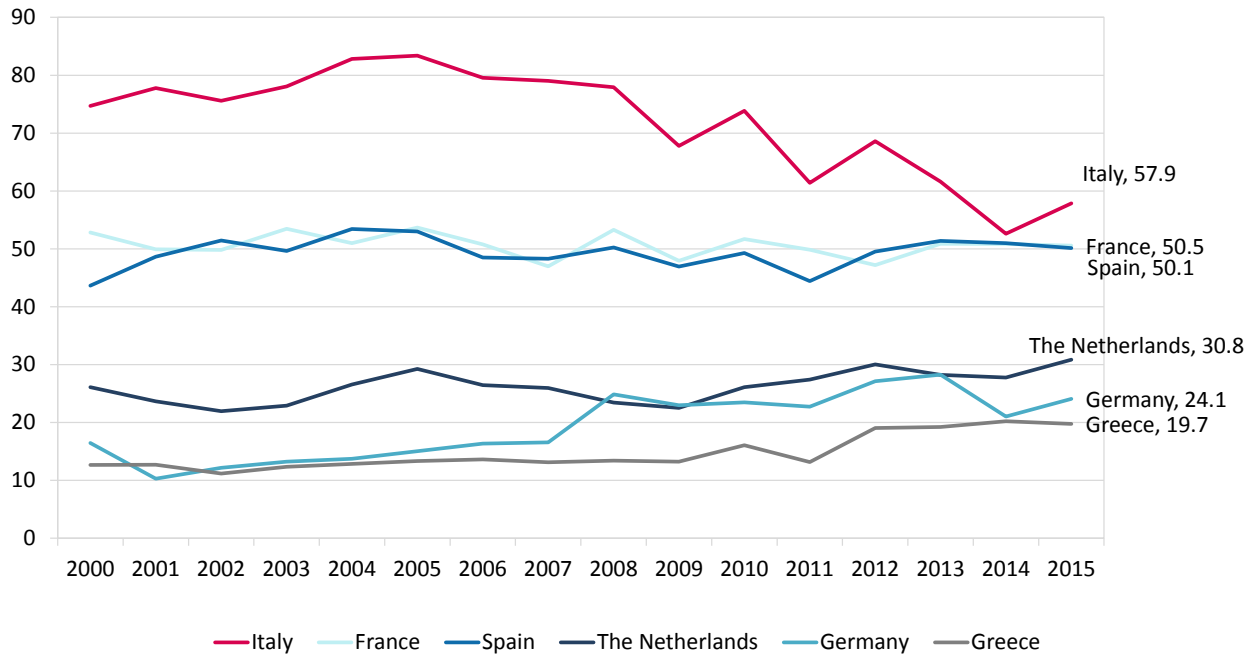


Figure 5 - Source: SRM elaboration on Eurostat data

### Maritime Trade with the Mediterranean Area: Average Value of Goods Traded

Italy and its main EU competitors; € per ton; 2015.

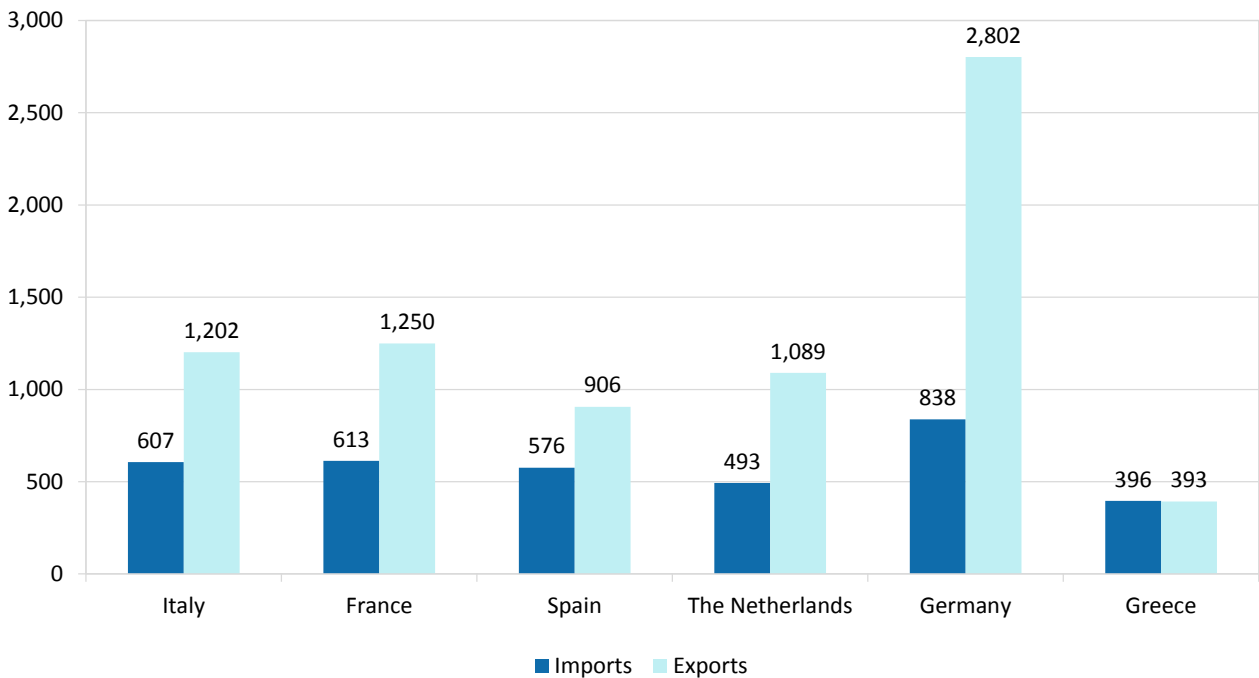


Figure 6 - Source: SRM elaboration on Eurostat data

# Maritime Trade: Italy's Main Regional Dynamics

This paragraph focuses on maritime relations between Italy's macro-regions (North-West, North-east, Central Italy, Southern Italy), as well as Italy's main regions, and the countries in the Middle East and North Africa (MENA)<sup>2</sup>. Among the four Italian macro-regions, **Southern Italy** recorded the highest value of maritime trade with MENA (€16.2bn) in 2015. While, in 2015 Southern Italy and the North West recorded a decrease in seaborne trade relations with MENA countries (respectively, -14.0% and -1.7%), there was an increase as for the North East (+5.7%) and Central Italy (+5.8%). In 2015, **seaborne exports** to MENA increased for Central Italy and the North East, while it was almost stable for North Western and Southern Italy. The North West continues to play a leading role, with €9.8 bn of exports in 2015.

Maritime trade has a growing and very important role in the trade between **Southern Italy** and MENA countries: it made up **98.5%** of total trade in 2015, a stable percentage compared to 2014. Maritime trade is preponderant but less important (than for Southern Italy) for the other Italian macro-regions: 83.7% for the North West; 81.4% for the North East and 78.1% for Central Italy.

## Maritime Trade between Italian Macro-Regions and the MENA region

€bn.

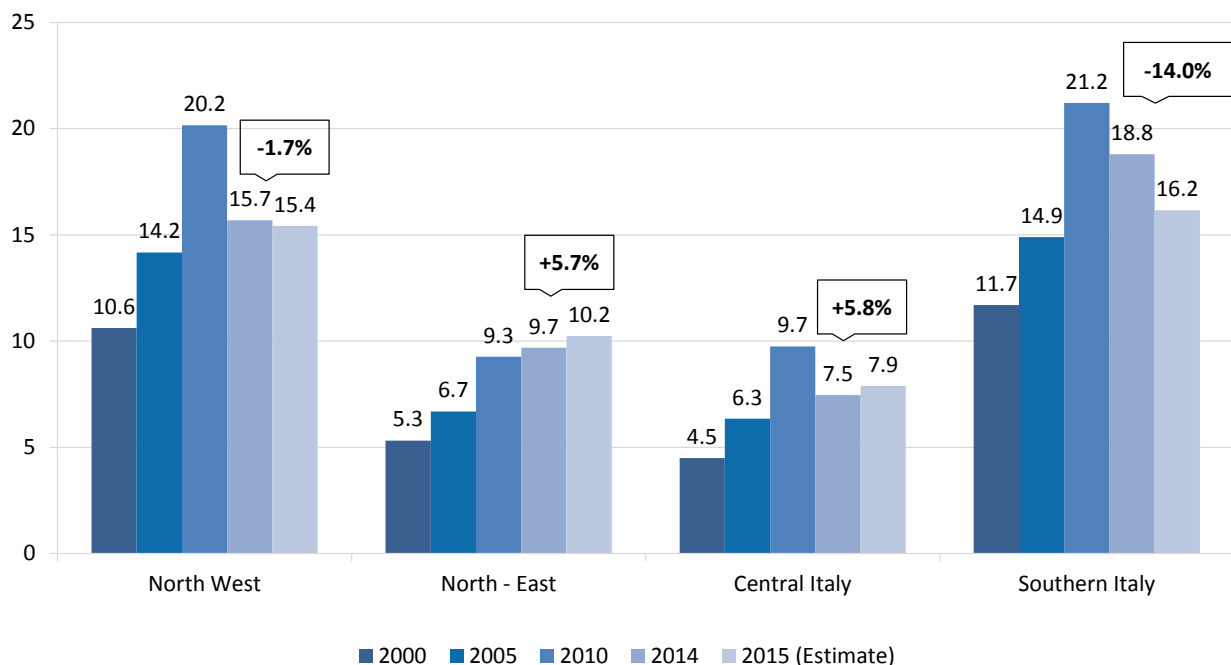


Figure 7 - Source: SRM elaboration on Istat data

<sup>2</sup> With reference to a macro-regional and a regional level, the Italian National Institute of Statistics (ISTAT) doesn't provide data on imports-exports relations with each country. Only data on bilateral trade with world's areas are provided. The partner-area considered in this paragraph is MENA. It doesn't exactly match the Mediterranean area used in paragraph 1. So data presented in this paragraph may partially differ from those used in the previous paragraph.



## Maritime Exports between Italian Macro-Regions and the MENA Region

€bn.

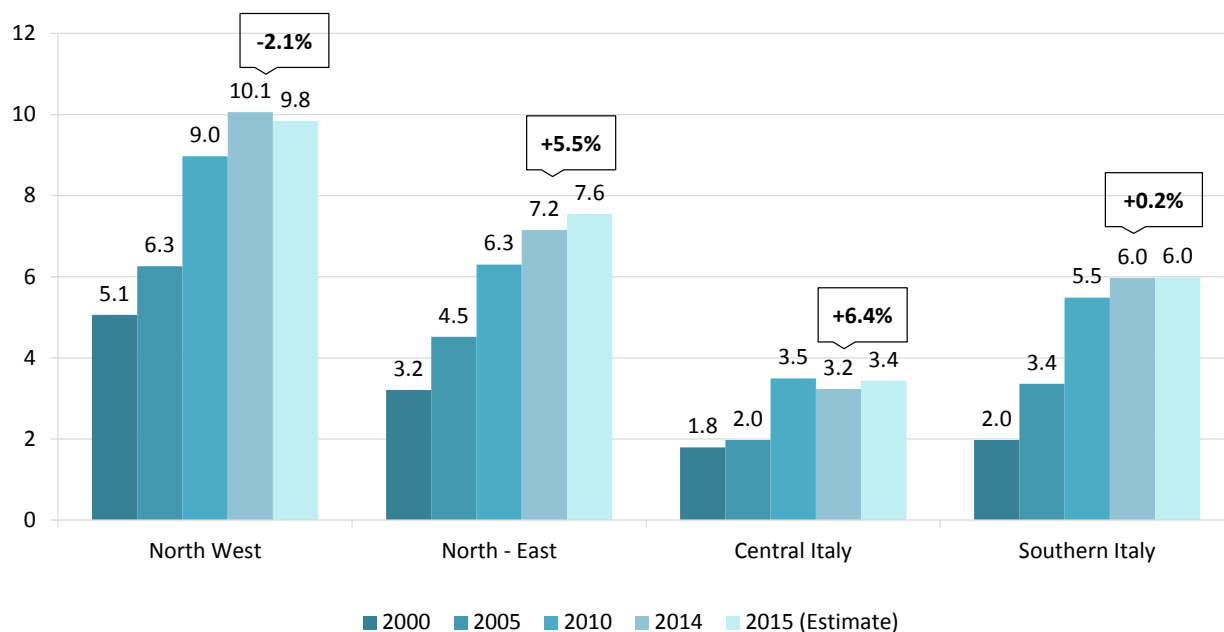


Figure 8 - Source: SRM elaboration on Istat data

## The Weight of Maritime Trade from Italian Macro-Regions' Total Trade with the MENA Region

Maritime trade: % of total.

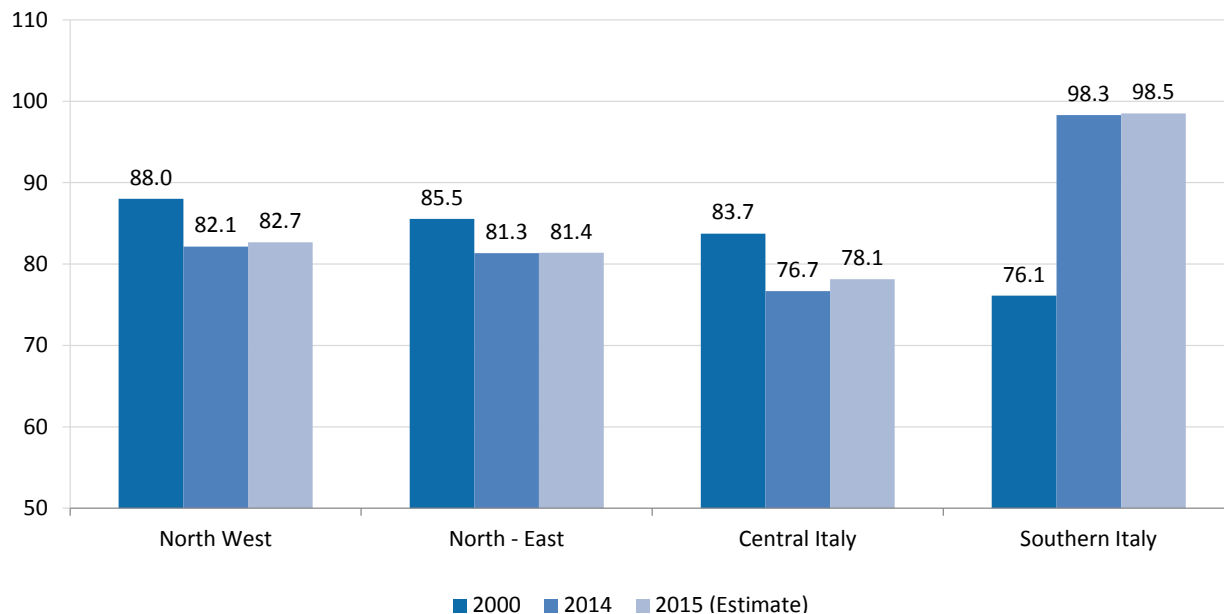


Figure 9 - Source: SRM elaboration on Istat data

In 2015, **Lombardia**, with €10.5bn (-0.6% compared to 2014), retained its primacy in maritime trade with MENA countries, followed by Sicilia (€8.2bn; -20.1%) and Sardegna (€5.0bn; -12.6%). Veneto (+3.8%), Emilia Romagna (+1.4%) and Lazio (+50%) improved their maritime relations with MENA countries in 2015. Good performances were also seen from Marche, Campania and Friuli Venezia Giulia.

**Seaborne exports** to MENA countries recorded an increase for almost all Italian regions in 2015. Lombardia still registered the highest value (€6.8bn). Sicilia and Sardegna are the Italian regions that have the highest incidence of maritime trade on total trade.

### Maritime Trade between Italian Regions and the MENA Region

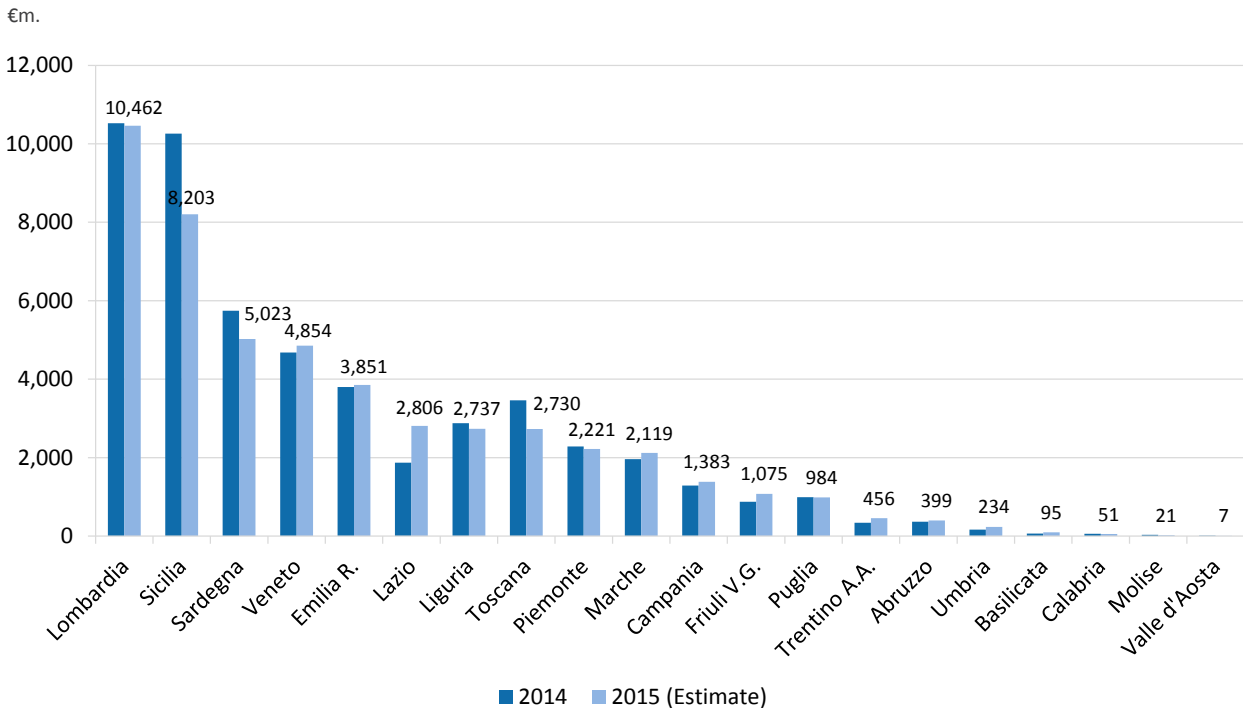


Figure 10 - Source: SRM elaboration on Istat data

### Maritime Exports between Italian Regions and the MENA Region

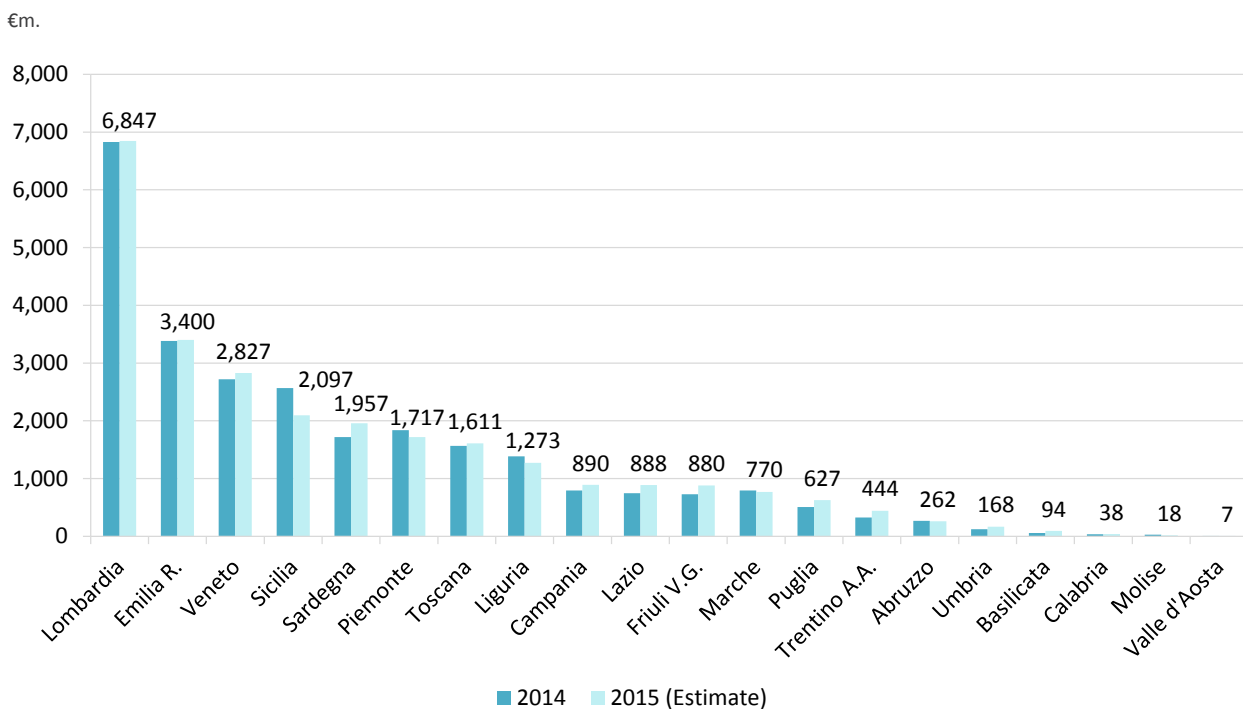


Figure 11 - Source: SRM elaboration on Istat data

### The Weight of Maritime Trade from Italian Regions' Total Trade with the MENA Region

Maritime trade: % of total.

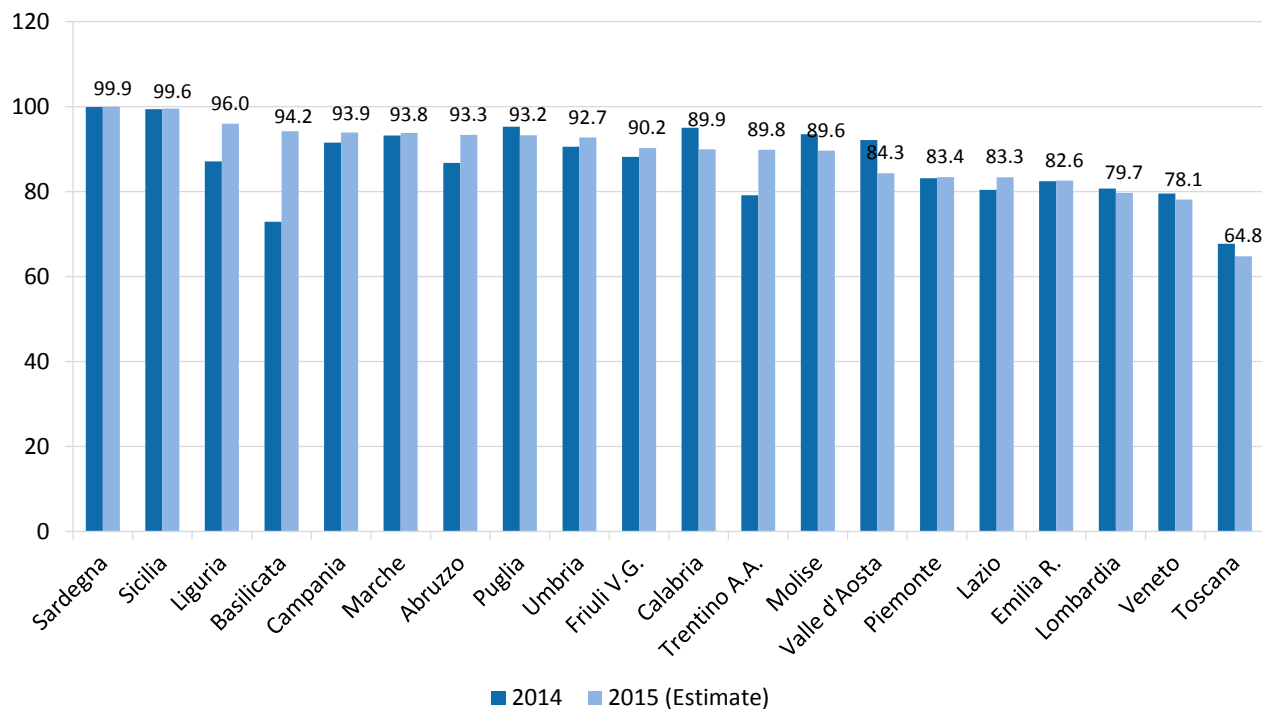


Figure 12 - Source: SRM elaboration on Istat data

# Competitiveness and Structure

## Connectivity and Logistics

How competitive is Italy's maritime industry? Based on Unctad's *Liner Shipping Connectivity Index* (LSCI) findings, neither too much nor too little. In 2015, Italy ranked 17<sup>th</sup>, with an LSCI of 67.4, a slight decrease compared to 2014, but with a 10 points increase compared to 2004, when the index was 58.1. Italy's LSCI is lower than that recorded by its main European competitors, in particular Germany and Netherlands that show an increase in 2015.

### Top 20 Countries by Liner Shipping Connectivity Index (LSCI)

China 2004 = 100.

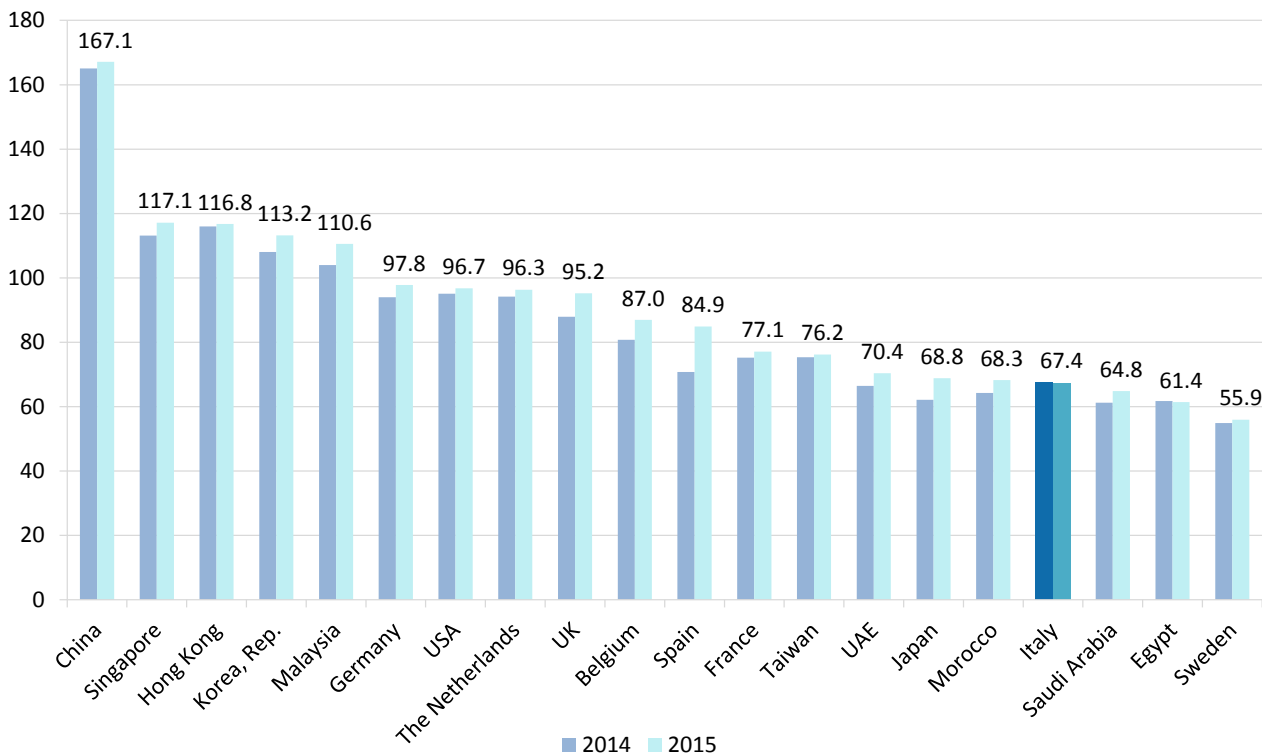


Figure 13 - Source: SRM elaboration on UNCTAD data

## Liner Shipping Connectivity Index (LSCI) Dynamics: a Comparison between Italy and Its Main European Competitors

2004-2015; China 2004 = 100.

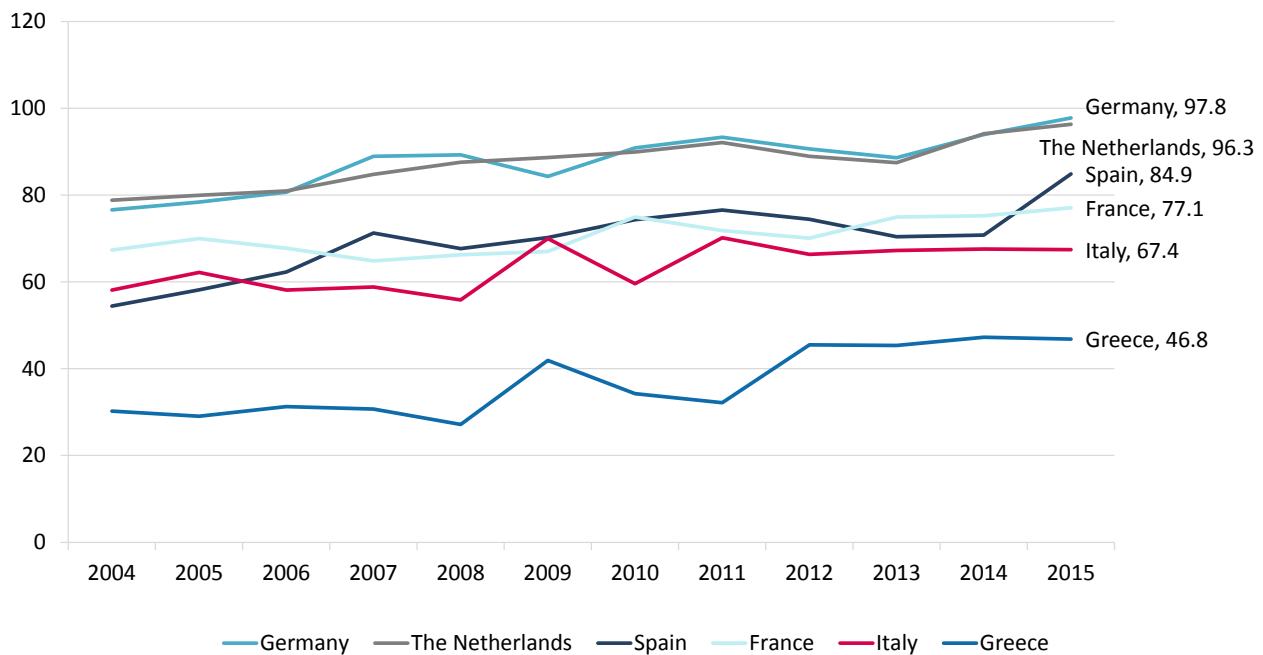


Figure 14 - Source: SRM elaboration on UNCTAD data

### The Liner Shipping Connectivity Index (LSCI)

The Liner Shipping Connectivity Index captures to the extent countries are connected to global shipping networks. It is computed by the United Nations Conference on Trade and Development (UNCTAD) based on five components of the maritime transport sector: number of ships, their container-carrying capacity, maximum vessel size, number of services, and number of companies that deploy container ships in a country's ports. For each component a country's value is divided by the maximum value of each component in 2004, an average of the 5 components is calculated for each country, and the average is divided by the maximum average for 2004 and multiplied by 100. The index generates a value out of 100 for the country with the highest average index in 2004. Therefore, data is indexed to that of China in 2004 (China 2004 = 100).

It's interesting to analyse Italy's competitiveness in terms of logistics services offered. Based on the World Bank's *Logistics Performance Index (LPI)*, in 2014 (latest available data), Italy ranked 20<sup>th</sup>, with an LPI of 3.69 and an increasing performance compared to 2007 when the index was 3.58. Let's now compare Italy with its main European competitors both in terms of maritime connectivity (LSCI) and logistics competitiveness (LPI). Germany is the best positioned, with both the LSCI and the LPI on the growth. Not far from Germany, the Netherlands show good performance. France and Spain are also ranked higher than Italy.

### Top 20 countries by Logistics Performance Index (LPI)

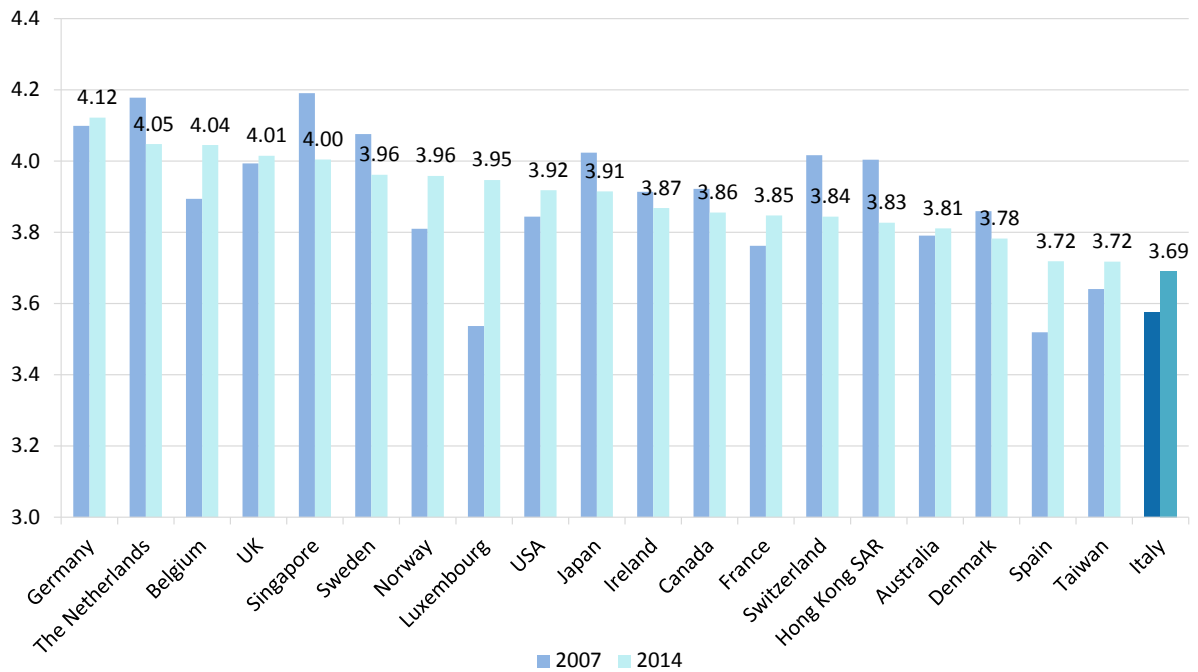


Figure 15 - Source: SRM elaboration on World Bank data

### Maritime Connectivity (LSCI) and Logistics Performances (LPI): Italy and Its Main European Competitors

LSCI: 2015; LPI: 2014; trend since 2007.

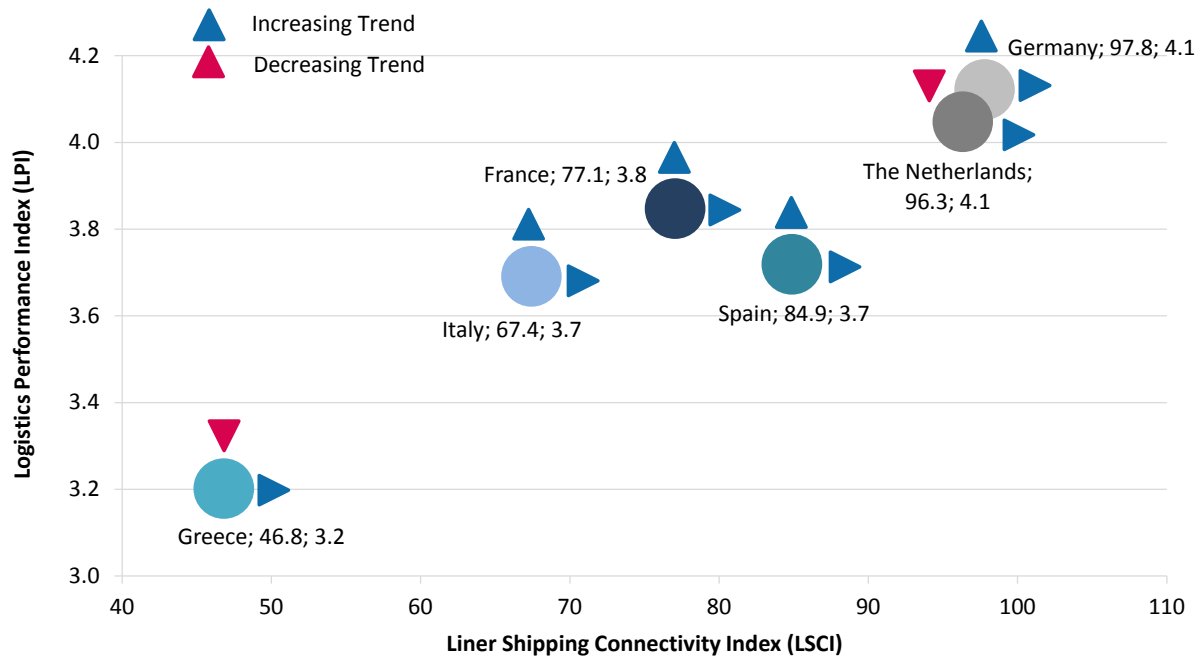


Figure 16 - Source: SRM elaboration on UNCTAD and World Bank data

## The Logistics Performance Index (LPI)

The Logistics Performance Index is provided by the World Bank. It is an interactive benchmarking tool created to help countries identify the challenges and opportunities they face in their performance in trade logistics and what they can do to improve their performance. The LPI 2014 allows for comparisons across 160 countries. The LPI is based on a worldwide survey of operators on the ground (global freight forwarders and express carriers), providing feedback on the logistics “friendliness” of the countries in which they operate and those with which they trade. They combine in-depth knowledge of the countries in which they operate with informed qualitative assessments of other countries where they trade. Feedback from operators is supplemented with quantitative data on the performance of key components of the logistics chain in the country of work.

The international LPI analyzes countries in six components:

- The efficiency of customs and border clearance (“Customs”).
- The quality of trade and transport infrastructure (“Infrastructure”).
- The ease of arranging competitively priced shipments (“Ease of arranging shipments”).
- The competence and quality of logistics services—trucking, forwarding, and customs brokerage (“Quality of logistics services”).
- The ability to track and trace consignments (“Tracking and tracing”).
- The frequency with which shipments reach consignees within scheduled or expected delivery times (“Timeliness”).

## Container Throughput and Short Sea Shipping

In 2014, global container port throughput increased by 5.1%; China’s ports handled 181 million TEUs (+6.3% compared to 2014), making up 26.5% of world’s total. Italy ranked 15<sup>th</sup>, with 11.3 million TEUs (1.7% of world’s total), a 7.4% increase compared to 2008 (+2.7% on 2013). Germany’s (19.7 million TEUs), Spain’s (14.7) and the Netherlands’ (12.5) container port throughput in 2014 was still higher than Italy’s.

### Top 20 Countries by “Container Port Throughput”

Millions of TEUs

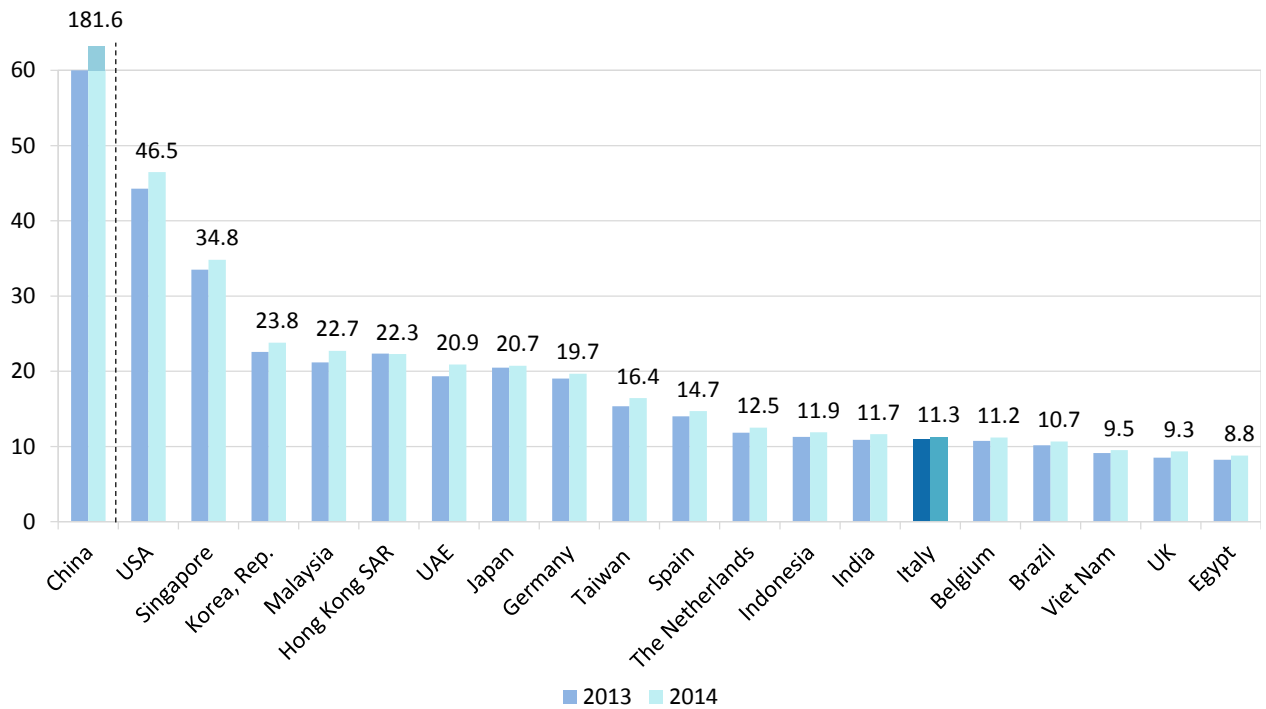


Figure 17 - Source: SRM elaboration on UNCTAD data

### Global Container Port Throughput: Each Country’s Share

Top 10 countries + Italy; % of Global Container Port Throughput; 2014.

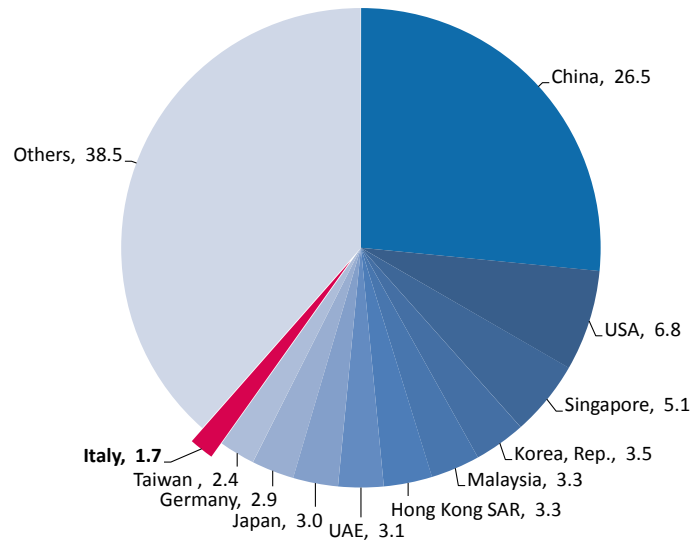


Figure 18 - Source: SRM elaboration on UNCTAD data



### Container Port Throughput Dynamics: Italy versus Its Main European Competitors

2008-2015; millions of TEUs.

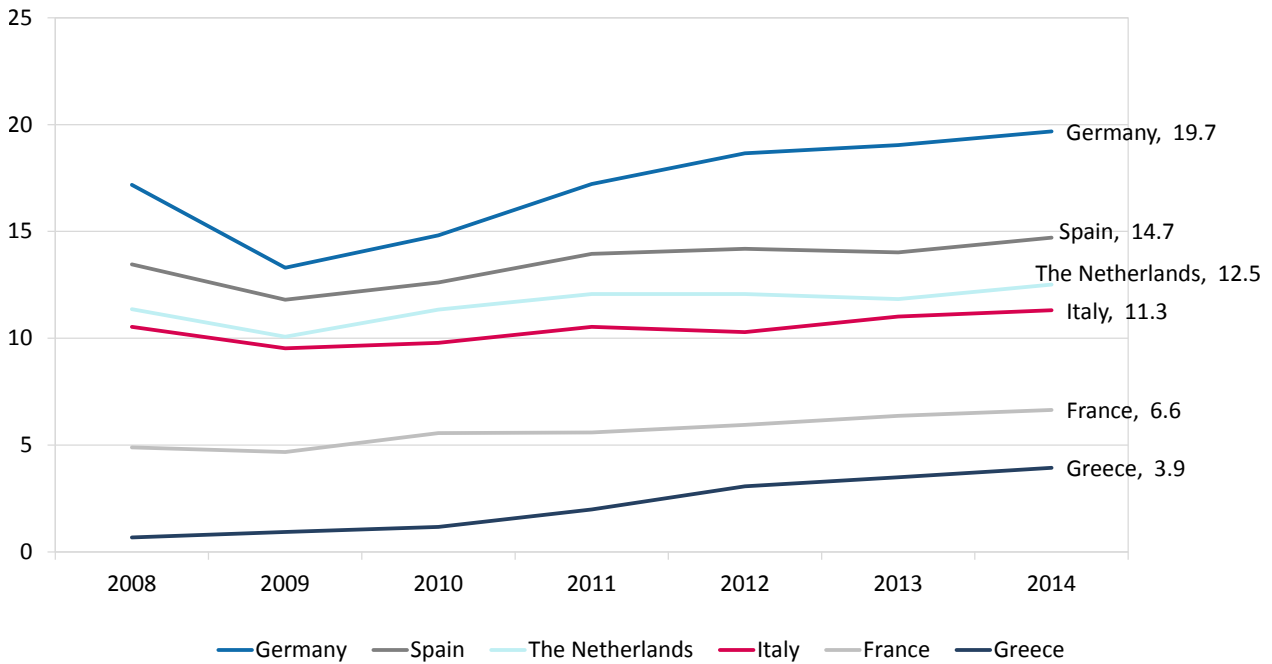


Figure 19 - Source: SRM elaboration on Eurostat data

### "Short Sea Shipping" Dynamics in the Mediterranean: Italy versus Its Main European Competitors

2000 - 2015; millions of Tonnes.

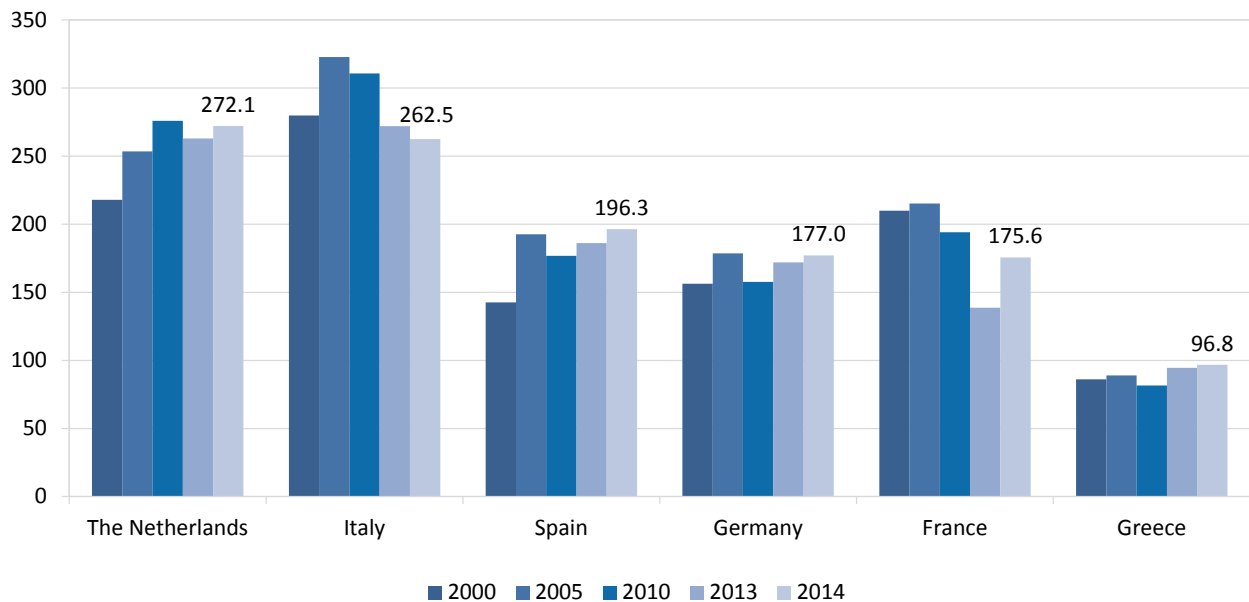


Figure 20 - Source: SRM elaboration on Eurostat data

## "Short Sea Shipping" Dynamics in the Mediterranean: Italy versus Its Main European Competitors

2000-2015; millions of Tonnes.

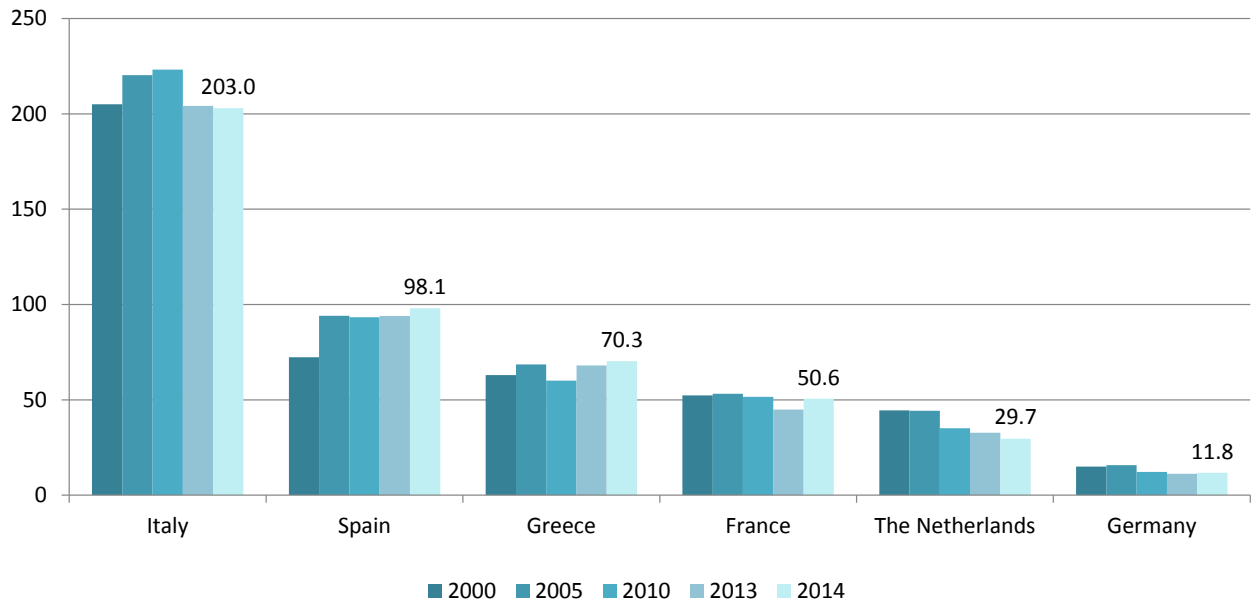


Figure 21 - Source: SRM elaboration on Eurostat data

## Italy's Primacy in the Mediterranean Short Sea Shipping

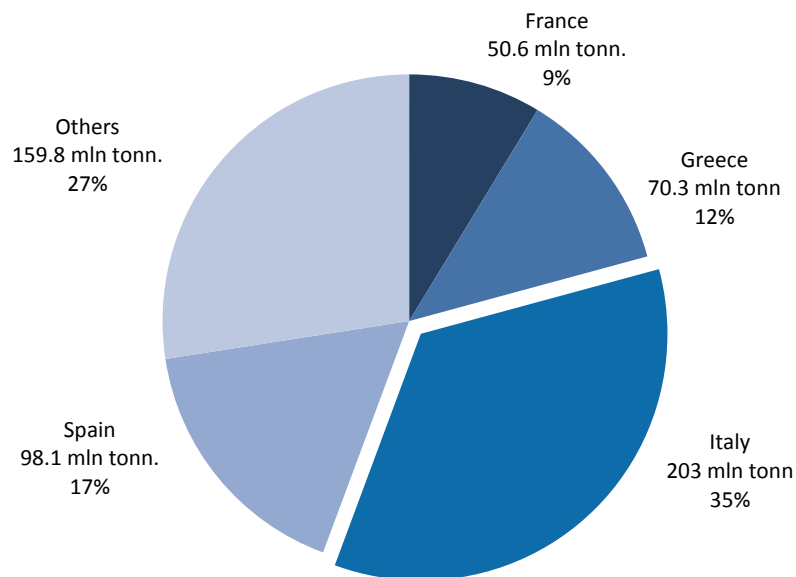


Figure 22 - Source: SRM elaboration on Eurostat data

## Maritime Industry's Competitiveness and Structure: Italy versus Its Main European Competitors



\* All data and rankings are at 2014, except for the LSCI (data as at 2015).

\*\* SSS=Short Sea Shipping.

\*\*\* As for SSS, rankings are calculated considering the European countries only .

Infographic 5 - Source: SRM elaboration on Eurostat, Unctad and World Bank data

# Mediterranean Ports: Maritime Traffic Flows

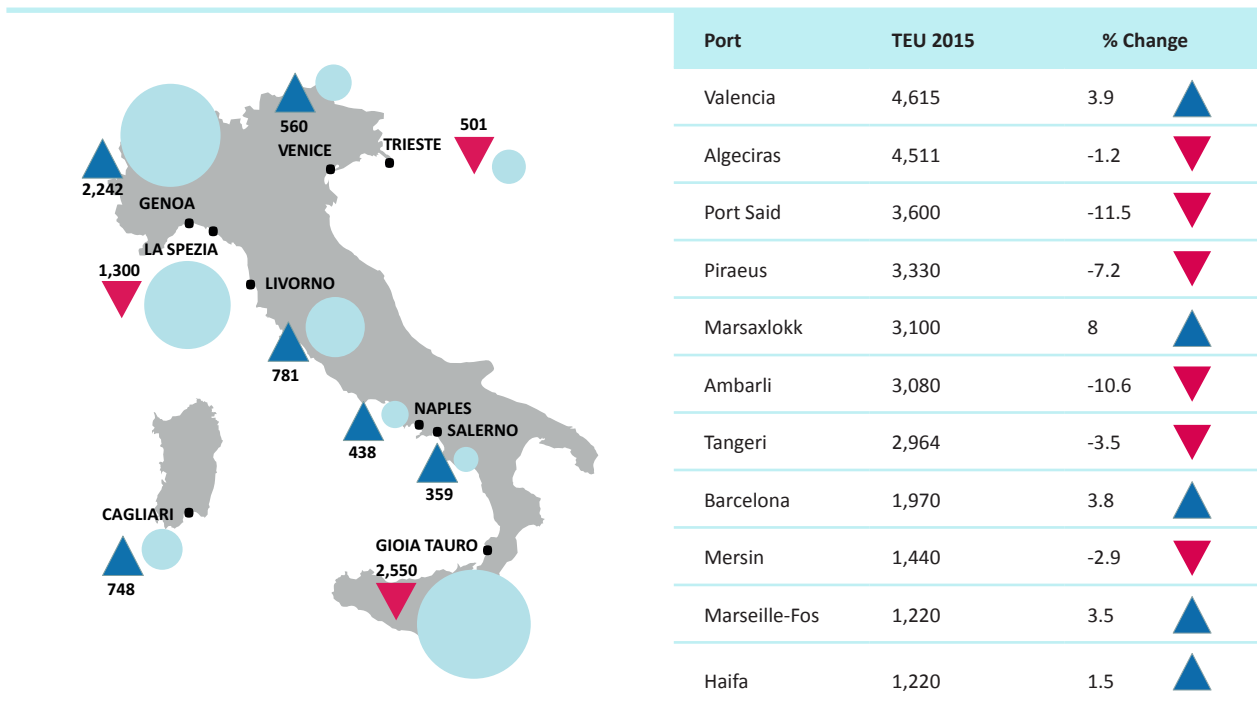
Valencia (Spain), Algeciras (Spain) and Port Said (Egypt) continue to be the three foremost Mediterranean ports, each with more than 3 million TEUs handled in 2015. Of these three, Valencia is the only one that recorded an increase of container throughput compared to 2014.

It's very interesting to analyse the long term trend. Tanger Med (Morocco) sets itself as the best performing Mediterranean port over the 2005-2015 period: the port reached container throughput of approximately 1 million TEUs in its first year of operation (2008). Thanks to the constant engagement of the government in establishing the country as a leading global maritime trans-shipment destination, Tanger Med throughput has constantly increased over the past few years, reaching almost 3 million TEUs in 2015. Ambarli (Turkey) has also made great strides over the past decade, from 1.2 million TEUs handled in 2005, to 3.1 million TEUs in 2015. Marsaxlokk (Malta), Piraeus (Greece) and Port Said (Egypt) doubled their container throughput in the 2005-2015 period, while Valencia (Spain) recorded a 91.5% increase. Among the Italian Ports, Trieste (+152.8%) and Venice (93.3%) registered the best performances in the period considered.

All this has brought a change in the Mediterranean ports' "market share".<sup>3</sup>

## Main Italian and Mediterranean Ports by Container Throughput

Thousands of TEUs as at 2015 and % change compared to 2014.



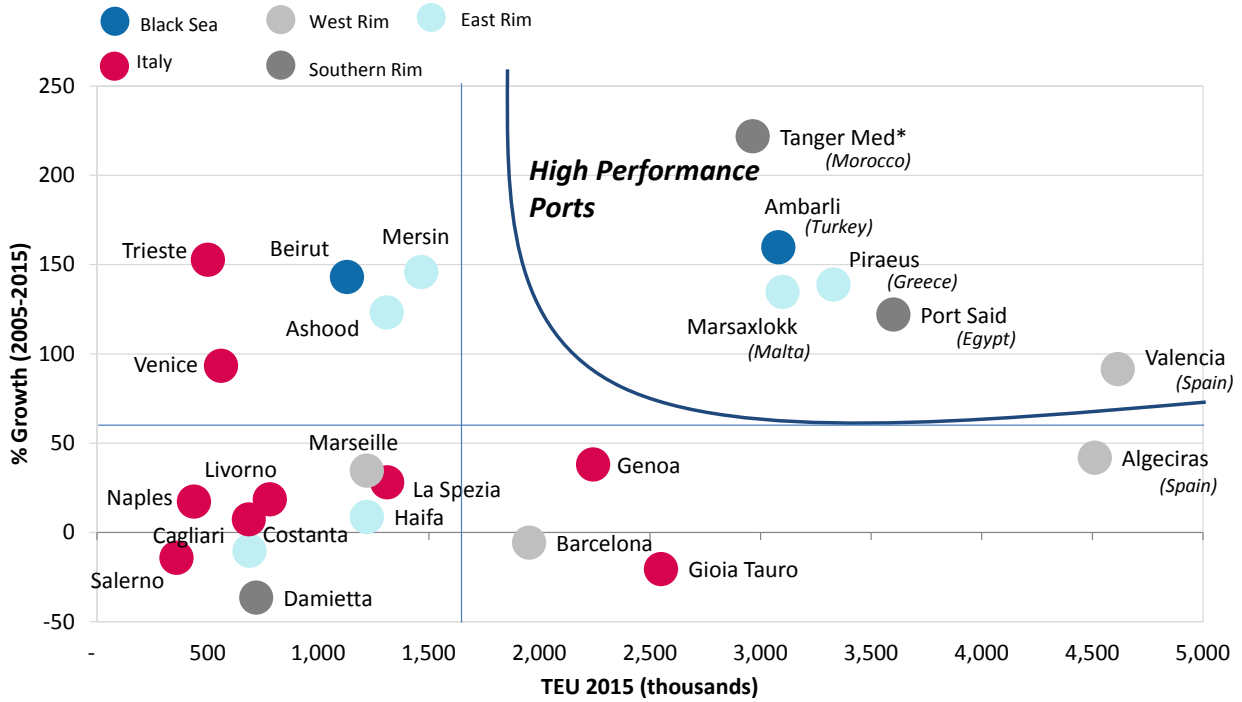
Infographic 6 - Source: SRM elaboration on port authorities and Assoporti data

<sup>3</sup> The analysis of ports' market shares is confined to hub-ports.

It is noticeable that Tanger Med's share grew from 0% in 2005 to 11% in 2015, Port Said's from 10 to 14%, Piraeus' from 9% to 13% Valencia's from 16% to 18%. A decreasing trend is observed for Italian ports instead: Gioia Tauro's share moved from 22% to 10% and Cagliari's from 4% to 3%.

### Top 20 Mediterranean Ports by Container Throughput and Container Throughput Growth

Thousands of TEUs as at 2015 and % change compared to 2005.

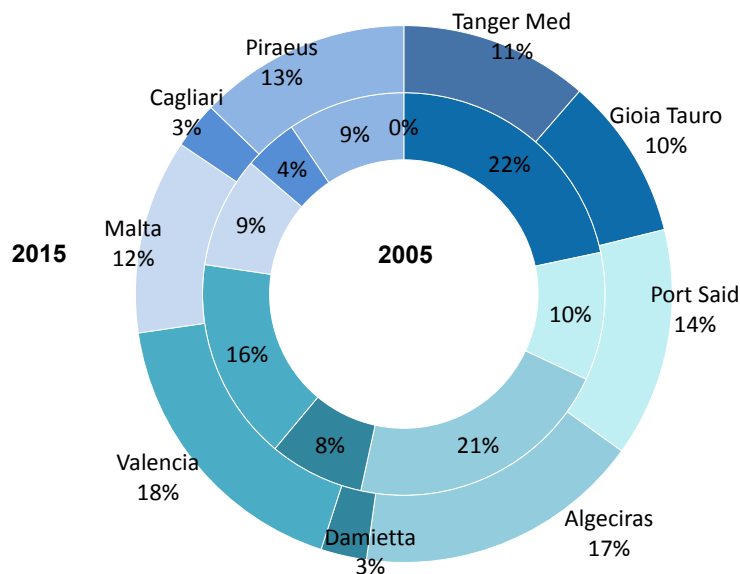


\* As for Tanger Med the % change refers to the 2008-2015 period.

Figure 23 - Source: SRM elaboration on port authorities and Assoporti data

### Ports' Market Share in the Mediterranean

TEU: % of total Mediterranean hub\* ports' container throughput.



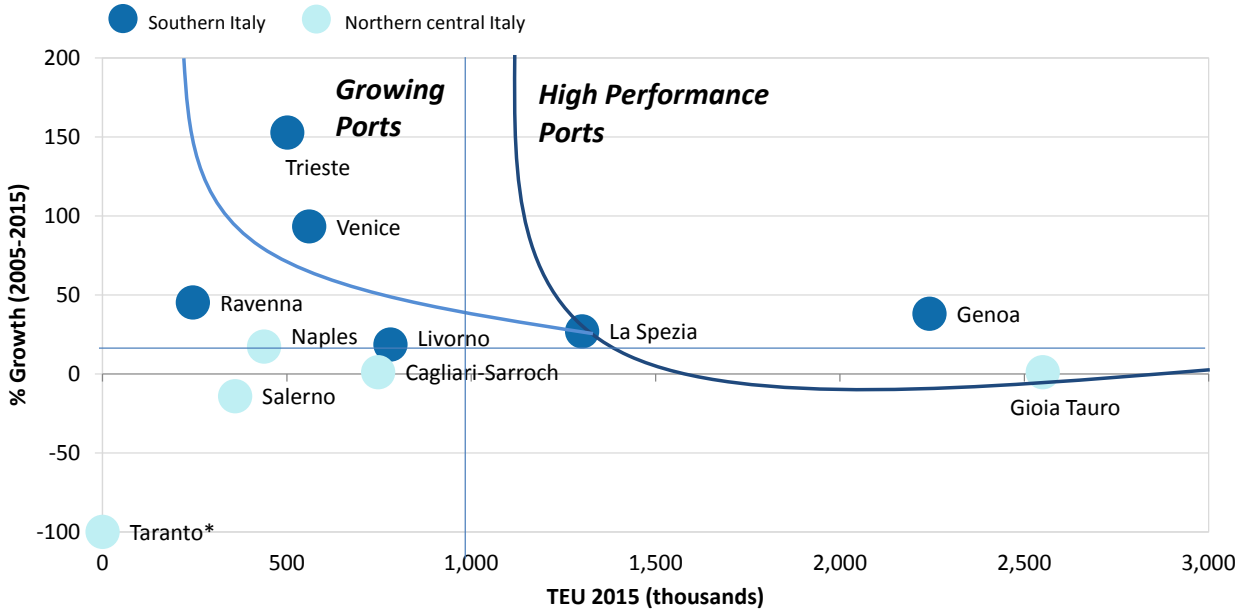
\* Hub-ports are those where goods transported through the use of containers represent at least 50% of the gross weight of goods handled.

Figure 24 - Source: SRM elaboration on port authorities and Assoporti data

With reference to the main Italian ports, in 2015, Gioia Tauro handled about 2.5 million TEUs (a 14.1% decrease compared to 2014), Genoa 2.2 million (+3.2%) and La Spezia 1.3 million (-0.2%). Livorno (780 thousand TEUs; +35.2%), Venice (560 thousand, +22.9%) and Salerno (359 thousand; +12.3%) were those with the highest growth in 2015.

### Top 10 Italian Ports by Container Throughput and Container Throughput Growth

Thousands of TEUs as at 2015 and % change compared to 2005.

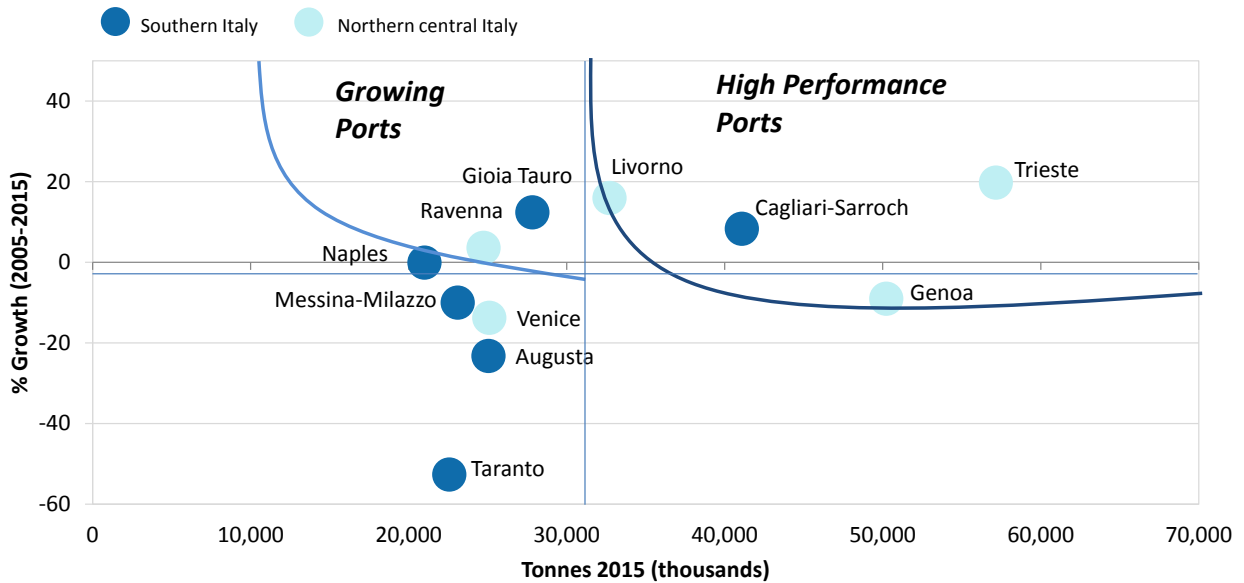


\* We are waiting to know the outcome of the tender for the granting of Taranto Container Terminal (TCT).

Figure 25 - Source: SRM elaboration on port authorities and Assoporti data

### Top 10 Italian Ports by Gross Weight (tonnes) of goods handled\* and Gross Weight Growth

Thousands of tonnes as at 2015 and % change on 2005.



\* Data includes: liquid bulk goods, dry bulk goods, Ro-Ro, containers and other goods.

Figure 26 - Source: SRM elaboration on port authorities and Assoporti data

When the analysis is extended to the gross weight of all goods (liquid bulk goods, dry bulk goods, Ro-Ro, containers and other goods). The ports of Trieste and Cagliari recorded the best performances (among the Italian ports) in the past decade: 57 million tonnes in 2015 for Trieste (+19.8% on 2005); 41 million for Cagliari (+8.4% on 2005). Livorno also recorded a good performance, with 32.7 million tonnes in 2015, +16% on 2005. Cagliari, Livorno and Venice registered the highest growth in the last year (respectively +22.9%, +15.4% and +15.3%).

### Italian Ports: Dynamics of their Container Throughput

2001-2015; TEUs and % change between 2014 and 2015.

	2001	2005	2010	2014	2015	2015 % Change on 2014
Gioia Tauro	2,488,332	3,208,859	2,852,264	2,969,802	2,550,000	-14.1
Genoa	1,526,526	1,624,964	1,758,858	2,172,944	2,242,902	3.2
La Spezia	974,646	1,024,455	1,285,155	1,303,017	1,300,442	-0.2
Livorno	501,912	658,506	628,489	577,470	780,874	35.2
Cagliari-Sarroch	25,908	639,049	629,340	717,016	747,693	4.3
Venice	246,196	289,860	393,913	456,068	560,301	22.9
Trieste	200,623	198,319	281,643	506,011	501,268	-0.9
Naples	430,097	373,626	534,694	431,682	438,280	1.5
Salerno	321,304	418,205	234,809	320,044	359,328	12.3
Ravenna	158,353	168,588	183,577	222,548	244,813	10.0
Ancona	90,030	64,209	110,395	164,882	178,476	8.2
Savona-Vado	50,092	219,876	196,434	81,755	98,033	19.9
Civitavecchia-Fiumicino-Gaeta	16,190	34,615	41,536	64,387	66,731	3.6
Catania	10,804	15,343	20,560	33,162	49,595	49.6
Bari-Barletta-Monopoli	1,577	10,008	680	35,932	35,932*	ns
Palermo	15,179	27,984	33,495	14,344	12,896	-10.1
Monfalcone	796	577	1,166	753	714	-5.2
Brindisi	6,446	2,166	1,107	407	329	-19.2
Marina di Carrara	9,197	6,222	7,793	384	68	-82.3
Taranto	197,755	716,856	581,936	148,519	0	ns
<b>TOTAL</b>	<b>7,272,001</b>	<b>9,702,708</b>	<b>9,777,962</b>	<b>10,221,127</b>	<b>10,168,675</b>	<b>-0.5</b>

\* Data as at 2014.

Table 1 - Source: SRM elaboration on port authorities and Assoporti data

## Italian Ports: Dynamics of the Gross Weight of Goods Handled\*

2005-2015; Thousands of tonnes and % change between 2014 and 2015.

	2005	2010	2014	2015	2015 % Change on 2014
Trieste	47,718	47,634	57,154	57,161	0.0
Genoa	55,189	50,702	50,968	50,226	-1.5
Cagliari-Sarroch	37,913	35,873	33,432	41,083	22.9
Livorno	28,211	30,299	28,335	32,712	15.4
Gioia Tauro	24,765	30,400	32,279	27,832	-13.8
Venice	29,099	26,390	21,779	25,104	15.3
Augusta	32,612	29,415	25,208	25,045	-0.6
Ravenna	23,879	21,922	24,460	24,739	1.1
Messina-Milazzo	25,661	23,068	22,092	23,105	4.6
Taranto	47,657	34,849	27,855	22,565	-19.0
Naples	21,009	21,923	20,125	20,997	4.3
Civitavecchia-Fiumicino-Gaeta	16,770	17,603	15,588	16,569	6.3
La Spezia	17,162	17,950	15,747	15,088	-4.2
Savona-Vado	16,156	14,098	12,087	13,201	9.2
Salerno	8,184	9,842	12,212	12,944	6.0
Brindisi	9,306	9,950	10,873	11,775	8.3
Ancona	9,210	8,521	8,569	8,593	0.3
Catania	3,817	4,877	6,791	7,558	11.3
Olbia-G.Aranci-Porto Torres	6,550	10,444	8,094	7,524	-7.0
Palermo-Termini Im	5,739	7,876	6,530	7,151	9.5
Piombino	8,286	6,555	6,213	6,492	4.5
Bari-Barletta-Monopoli	4,416	6,490	5,997	5,997**	ns
Monfalcone	3,838	3,088	4,286	4,451	3.9
Chioggia	2,133	1,833	1,530	1,591	4.0
Marina Carrara	3,062	3,342	1,668	1,400	-16.1
Portonogaro	1,228	1,205	1,011	1,028	1.7
<b>TOTAL</b>	<b>492,914</b>	<b>476,148</b>	<b>460,884</b>	<b>471,930</b>	<b>2.4</b>

\* Data includes: liquid bulk goods, dry bulk goods, Ro-Ro, containers and other goods.

\*\* Data as at 2014.

Table 2 - Source: SRM elaboration on port authorities and Assoporti data





## Interview with Eamonn O'Reilly Chief Executive at Dublin Port Company

**Can you give us a brief outline of the port (traffic, location, type of cargo handled, what are the main carriers who work in the port etc.)?**

Dublin Port is the largest port in Ireland and is situated on the River Liffey on the east coast of Ireland. Dublin handles all cargo types but the dominant trade is Ro-Ro freight with the ports of Holyhead and Liverpool on Britain's west coast.

In addition to Ro-Ro with Britain, there is also Ro-Ro trade with Zeebrugge and Rotterdam and Lo-Lo traffic with major European ports including Rotterdam, Antwerp and Le Havre.

**DUBLIN PORT  
IS THE LARGEST  
PORT IN  
IRELAND**

**Can you tell us what are the most important strategic objectives achieved by the Port in the past few years, what major projects have been completed and any details of future projects?**

Dublin is a gateway port for an island economy with very large international trade in goods (valued at more than 80% of the country's GDP).

Having seen growth of 17.3% in the three years to 2015, we expect continued large growth in the years ahead. Our major strategic challenge, therefore, is to provide additional port capacity for the port's private sector cargo handling operators.

In 2015, we received planning permission for the €230m Alexandra basin redevelopment Project. This is financially supported by a €23m CEF grant from the EU and by a €100m long-term debt facility agreement with the EIB.

The project will see us rebuilding 3,000m of the port's 7,000m of quays and berths. In doing this we will also deepen the port from -7.8m CD to -10.0m CD.

With a tidal range of about four meters, this will allow Dublin to receive ships with draughts approaching 13m in future years. Moreover, we will also build a wider turning circle in the heart of the port which will allow Dublin receive the largest cruise ships in the world in the heart of the city.

**What, in your view, are the areas in the world with the most opportunities the shipping? What about the Mediterranean countries (North African in particular)?**

Dublin's trade will always be dominated by a combination of short-sea Ro-Ro and Lo-Lo feeder traffic with major European ports. However, we are also seeing niche service from farther afield, notably Seago Line's new service from Algeciras to Liverpool and Dublin.

With trade through Dublin growing much faster than ship size for such niche services, I expect to see more and more direct services from farther afield, particularly from the Mediterranean, Africa and the Baltic.

**Which strategic guidelines have you implemented for the benefit of companies and territories?**

Dublin Port Company operates Dublin Port as a landlord port and there is intense competition between service providers in all cargo modes.

We invest in the infrastructure and with a very large capital programme to be delivered, we prioritise projects which will enable operators to make the most efficient use of the port's limited land area.

**Does your port have any agreements with other Italian and foreign ports and on what terms?**

We don't have any major agreements with foreign ports but I believe that these will develop, firstly, with ports in Britain in future years to ensure that capacity is added simultaneously at both ends of the busiest shipping routes.

Beyond that, we signed a co-operation agreement last year with the Port and City of Batumi in Georgia and we have explored opportunities to work with Livorno.

In general, we support informal network relationships through, for example, ESPO, AIVP and the General Stevedoring Council which allow us co-operate on a bilateral basis with ports worldwide and share knowledge and experience with them. The port industry is collegial by nature and the sharing of experience and expertise directly is the best means for us all to learn from each other.

**What do you think about the Enlargement of Suez and Panama canals? Can these projects give any opportunities to your port?**

It is unclear whether either canal development will have any direct impact on Dublin. The only possible impact I see is an indirect one from the 'Liverpool2' project benefits from increased traffic through the widened Panama Canal.

**DUBLIN'S TRADE  
WILL ALWAYS BE  
DOMINATED BY  
A COMBINATION  
OF SHORT-SEA  
RO-RO AND LO-LO  
FEEDER TRAFFIC  
WITH MAJOR  
EUROPEAN  
PORTS**

However, even then, from Dublin's perspective, all we will see is ships coming over the horizon. Whether they come from an expanded Liverpool or from ports in Continental Europe makes little difference to us.

### **Does your port have any agreements or synergies with other infrastructure/companies (railways, distripark, agreements with major carriers, etc.) and in which way?**

Being a small island country, there is very little rail freight in Ireland. Notwithstanding this, we have expanded the port's internal rail capacity in recent years and have seen a growth in containerised rail freight. I expect to see further growth in rail freight of biomass for power generation in future years. However, against a background of rapidly increasing volumes, I do not see the proportion of the port's volume handled by rail increasing significantly. As regards port-centric logistics, this has not been successful in Dublin due to the port's excellent connection via a tunnel to the country's motorway network and to distribution facilities outside the port. We are currently looking to purchase a large (44 hectares) park 14km from the port which we intend to develop, initially, for non-core but port-related activities (such as empty container depots) in the years ahead. I would also envisage our developing transit storage areas in the external port logistics zone to provide off-port storage locations for slower moving unitised cargo. Our motivation in both cases is to greatly increase the utilisation of the port's 260 hectare estate.

### **Can you give us forecasts on the port and could you tell us which will be the most exciting projects that will be implemented in the short, medium and long term?**

We have a range of projects in various stages of planning and construction:

- We have commenced work on the Alexandra Basin redevelopment project and hope to have completed the civil works in 2019 and the capital dredging two years later.
- Next up will be the purchase and development of the 44 hectare external port logistics zone.
- We also plan to lodge a planning application before the end of 2017 for a major project to redevelop the port's Ro-Ro terminals and a Lo-Lo terminal.
- We are simultaneously developing a project for a major development on lands in the south of the port commencing in 2030.
- Finally, will start during this year to evaluate the possibility of a complementary development which could support the growth of the pro's cruise business including Dublin becoming a home port for a major cruise line.

### **Has your country any particular plans to support the development of ports and shipping activities?**

As an island nation with a much larger area of sea than land, Ireland has developed a national policy, Harnessing Our Ocean's Wealth ([www.ouroceanwealth.ie](http://www.ouroceanwealth.ie)) which sets national objectives and strategies for the development of all aspects of Ireland's maritime sector, including shipping and ports.

**IRELAND HAS  
DEVELOPED A  
NATIONAL POLICY,  
HARNESSING  
OUR OCEAN'S  
WEALTH**



## Interview with Santiago Garcia-Milà

Deputy Director General of  
Barcelona Port Authority

**Can you give us a brief outline of the port (traffic, location, type of cargo handled, what are the main carriers who work in the port, etc.)?**

The Port of Barcelona is Catalonia's main transport and services infrastructure and a benchmark port in the Euro-Mediterranean area. Its area of influence stretches through the south and centre of Europe and North Africa and it is the logistics gateway linking markets as distant as the Far East and Latin America. With around 100 regular shipping lines connecting Barcelona with more than 200 ports in five continents, it is specialised in general cargo and high value added cargo such as consumer goods, electronics products and vehicles.

The Port of Barcelona provides 35,000 jobs and it is Spain's leading port in terms of turnover and goods value (it moved goods worth € 54 billion in 2014).

The Port channels 71% of Catalonia's external maritime trade and 22% of the national total.

The last few years have witnessed a process of far-reaching concentration and specialisation of the terminals, which are privately managed and operated under a concessionary regime by companies in competition with each other. The Port currently has thirty goods terminals specialised in containers, vehicles, coffee and cocoa, metal products, solid and liquid bulks, and passengers.

Barcelona therefore has a highly diversified port, which we could almost describe as five-in-one: the commercial port; the energy port; the cruiser port; the logistics port; and the citizen's port, known as the *Port Vell*.

**THE PORT OF  
BARCELONA IS  
SPECIALISED IN  
GENERAL CARGO  
AND HIGH VALUE  
ADDED CARGO**

## Can you tell us what are the most important strategic objectives achieved by the Port in the past few years, what major projects have been completed and any details of future projects?

The Port of Barcelona ended 2015 with positive results in its key traffic indicators, with record figures in foreign trade and certain strategic cargo segments such as vehicles and motorways of the sea. Containers are a key traffic and a good barometer of the economic environment, and the Port registered 2 million TEU, up 4% year on year.

This growth was even higher if taken only in terms of foreign trade.

Export containers at the Port of Barcelona increased by 6.5%, while on the import side there was year-on-year growth of 9%.

Vehicles traffic performed very well in 2015, recording a year-on-year increase of 18%. The Port of Barcelona closed the year with 881,893 cars transported, which is an all-time record.

Another record-breaking figure was the volume of goods transported by the motorways of the sea - the short sea shipping lines connecting the Catalan capital with several destinations in Italy and North Africa. In 2015 the Port of Barcelona's motorways of the sea channelled 136,659 ITUs (intermodal transport units, equivalent to one truck, platform or trailer), marking an increase of 21.5%.

In 2015, and most importantly, we also launched our Third Strategic Plan which sets the Port of Barcelona's strategic objective: to become the main euroregional distribution centre in the Mediterranean competing with the ports of Northern Europe. Three strategic axes will guide our development in the upcoming years: growth, competitiveness and sustainability. For each one, we have defined some specific objectives to be achieved by 2020, such as the following: increasing strategic traffics; enlarging the Port of Barcelona's hinterland; improving connectivity with the foreland; improving the efficiency and quality of Port services; reducing the logistics costs of the movement of goods; creating new services and enhancing existing differential services; improving accessibility and mobility and fostering intermodality, amongst others.

## What, in your view, are the areas in the world with the most opportunities the shipping? What about the Mediterranean countries (North African in particular)?

The European port system was based up until the 1980s on a commercial model that has now changed radically. From the 16th century to the late 20th century, the transatlantic routes were the main axis of world trade, fostering the growth and development of the major ports in Northern Europe. Today the Asia- Europe route moves three times the traffic of the transatlantic route. The vast majority of Asian traffic enters Europe via the Suez route, crossing the Mediterranean after passing Gibraltar and heads to the major ports of Northern Europe, where goods are unloaded and transported to centres of consumption in central Europe, or vice versa. Loading or unloading these goods in the Mediterranean ports would mean sailing around 2.000 nautical miles fewer, depending on the port, with the consequent reduction in consumption and emissions, shortening travelling time by four days, needing fewer ships to maintain the same level of frequency. This paradigm shift already represents a significant reduction in internal and external costs for trade between Europe and Asia.

**THE PORT OF  
BARCELONA  
ENDED 2015  
WITH POSITIVE  
RESULTS IN ITS  
KEY TRAFFIC  
INDICATORS**

Europe's competitiveness requires a change in its global logistics model and the Mediterranean ports must become a real alternative for serving the continent.

The development of the new Trans-European Transport Network (TEN-T), in which the Port of Barcelona is part of the core network, and increasing pressure from environmental legislation to promote more sustainable modes of transport could foster logistics changes in Europe and boost the Mediterranean ports.

It is important to stress that North African economies have a very significant potential to grow and are set to play a more prominent role in the Mediterranean area in the future. Ports in the Maghreb area are emerging and competing with other sites in the Mediterranean region. Morocco took the lead with Tanger-Med, in operation since 2007, but other countries are also investing in new infrastructures to take advantage of their geostrategic position. Algeria has just started work on El Hamdania, a mega-port that is being developed in Sersell (94 kilometers away from Algiers) with a 2.9 billion euros investment by two Chinese companies (China State Construction Corporation and China Harbour Engineering Company). A new deep water port is also in project in the gulf of Hammamet, inside the industrial area of Enfidha (Tunisia), with a capacity of five million TEU.

These infrastructures, amongst others that are being planned or enlarged, will increase port supply in the Western Mediterranean and will create greater competition among regional port clusters.

## **Which strategic guidelines have you implemented for the benefit of companies and territories?**

The Port of Barcelona's mission is to contribute to the competitiveness of the customers of the Port by providing efficient services responding to their needs for maritime transport, land transport and logistics services. Efficient supply chain management is now the main concern of companies; so much so that competition is now understood to occur between logistics chains rather than between companies. Becoming the top Mediterranean logistics port requires recognizing this market reality and adopting the door-to-door supply chain as the product that the Port of Barcelona must provide to the market.

To enhance the competitiveness of the logistics chain, the Port Authority has developed client-oriented services. Among these services, we should highlight the Customer Service which is the link between the market and the Port; PortIC, the Port Community System; and Port Links, a tool that enables customers to create transport chains to import or export a container between any part of the world and a European localization through Barcelona.

## **Does your port have any agreements with other Italian and foreign ports and on what terms?**

We have a close-knit relationship with a number of Italian ports. For instance, Intermed, founded in 1998, is an association comprising the ports of Barcelona, Marseilles and Genoa, three ports which handle most of the maritime trade of Spain, France and Italy.

The Escola Europea de SSS, founded by the Port of Barcelona with the ports of Genoa and Civitavecchia as main partners, promotes sustainable logistics in Europe through innovative courses. We have also shared work and efforts with Italian ports in different European projects, such as B2MOS, Glad, Life, etc.

**THE PORT OF  
BARCELONA HAS  
A CLOSE-KNIT  
RELATIONSHIP  
WITH A NUMBER  
OF ITALIAN  
PORTS**

## What do you think about the Enlargement of Suez and Panama canals? Can these projects give any opportunities to your port?

Considering that Suez Canal is the gateway for one of the main axis of world trade (Asian-Europe route), enlarging its capacity will make it more competitive than other transport alternatives, such as the railway connection between China and Europe, the future Arctic route or the Cape of Good Hope's route. The impact of the enlargement of the Panamá Canal on Port of Barcelona will probably be less significant, but we will consider all the new opportunities that might help us to increase traffic with other destinations on the foreland. In fact, next November a Port de Barcelona's delegation, along with executives from logistics and import-export companies, will travel to Panamá and Cuba to explore business opportunities in both countries.

## Does your port have any agreements or synergies with other infrastructure/companies (railways, distripark, agreements with major carriers, etc.) and in which way?

The Port of Barcelona collaborates with several companies and professional associations on many different levels. During the last 15 years we have developed the 'networked port' concept to enlarge and reinforce our hinterland. It consists of a network of inland goods terminals that help operators and shippers to create more efficient logistics chains and channel their products through Barcelona. The keystones of this networked port are Terminal Marítima de Zaragoza (founded in 2001), dry ports of Coslada and Azuqueca de Henares, Terminal Intermodal de Navarra and Perpignan Saint Charles Terminal.

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The Port of Barcelona provides railway services to all these platforms and collaborates with different local partners in order to promote its logistics offer.

The Port also has alliances with terminals, shipping companies, operators of port services, other public administrations, freight forwarders and other ports. There is one initiative that embodies the Port of Barcelona's drive for cooperation: the Port of Barcelona Efficiency Network, a quality brand which entails a programme of commitments approved through cooperation among the various players within the Port Community. More than 70 companies have already been certified under this quality label launched five years ago. The companies that have received the quality label proving that they are accredited to develop their processes in line with maximum efficiency standards represent the main business areas within the Port Community - freight forwarders and customs agents, shipping agents, hauliers and terminals.

## Can you give us forecasts on the port and could you tell us which will be the most exciting projects that will be implemented in the short, medium and long term?

As I mentioned before, our Third Strategic Plan sets the objectives of the Port of Barcelona for the next years. In 2020 we are planning to achieve a throughput of 70 million tons, 3 million containers, 1.2 million vehicles, 150,000 UTI transported by motorways of the seas and 3 million cruise passengers.



These goals are related to our growth expectations, but there are other very interesting objectives related to competitiveness and sustainability that will help us to consolidate the Port as the top logistics hub in the Mediterranean.

We are completing the road and rail access to the Port and, in the medium term, will build the Port of Barcelona intermodal terminal in the old Llobregat riverbed, along with a 'rail motorway' terminal (which will be developed in partnership with VIIA). This infrastructure will be instrumental to connect the Port of Barcelona to the French market.

In order to strengthen our position in the hinterland, we are also promoting activity in the inland terminals. For instance, Terminal Marítima de Zaragoza (tmZ), is being enlarged and will soon include an area for reefer operations. Other projects include promoting the Port's automation and sensing (smart port) and reducing the most significant costs of the port bill in relation to customers, shipping companies and logistics operators.

This year work will begin on Terminal E (the seventh cruise terminal in the Port), which will be built and managed by Cruise Corporation, the world's leading cruise operator.

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maritime  
economy