



VENICE
PORT AUTHORITY



The Adriatic-Baltic corridor: the NAPA perspective Seminar

**INTEGRATING SEA PORTS AND TRADE CORRIDORS:
The key role of railways
Marco Spinedi
Consulente scientifico ITL**

Venice, 18 April 2013

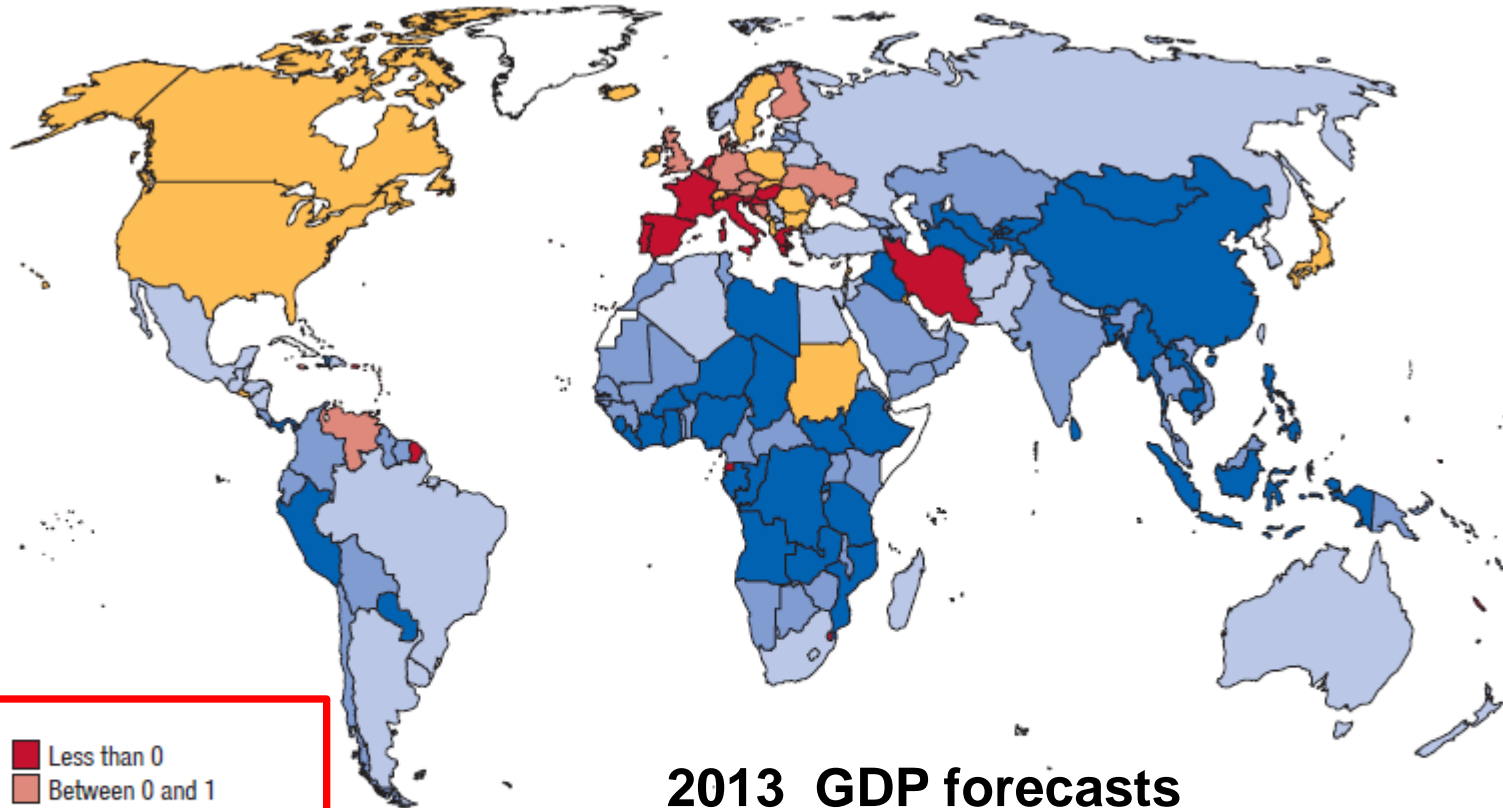


Elements for a scenario



Elements for a scenario

IMF - World Economic Outlook - April, 2013



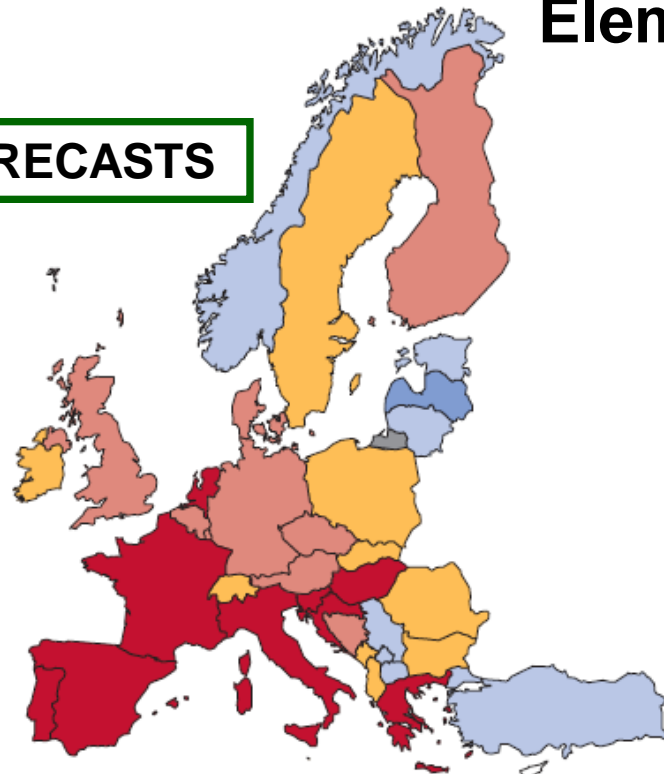
Source: IMF staff estimates.

2013 GDP forecasts

IMF: "A world economy at three speed recovery"

Elements for a scenario

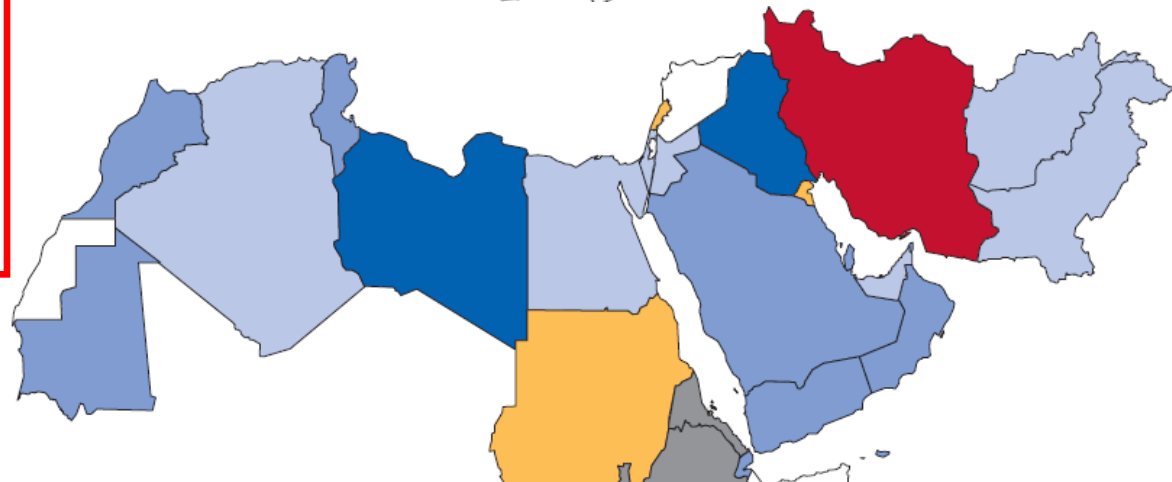
2013 GDP GROWTH FORECASTS



IMF - World
Economic Outlook
April, 2013

- Less than 0
- Between 0 and 1
- Between 1 and 2
- Between 2 and 4
- Between 4 and 6
- Greater than or equal to 6
- Insufficient data
- Covered in a different map

Source: IMF staff estimates.
Note: Includes Israel.



Elements for a scenario

Combining size of the economy and demography

Where is wealth?

GDP growth between 0,1 & 1,2%

Austria
France
Germany
Italy
Spain

Population: 262 mil.

2013-2018 IMF projections

GDP growth between 0,5 & 2,5%

Czech Rep. Slovak Rep
Hungary Slovenia
Poland Ukraine
Romania

Population: 133 mil.

Where is growth?

GDP growth more than 3%

Algeria
Egypt
Morocco
Tunisia
Turkey

Population: 238 mil.

Elements for a scenario

Exports as major engine of growth for many countries



- **Exports keep on growing at double the pace of GDP in advanced economies**
- **Domestic consumption growth in China and Asia favors more balanced trade flows with the West**



Elements for a scenario

Major implications for transport & logistics

28 major ports in East Europe and East Med regions for a total of about 18 mil.TEU; 6 Transshipment ports for a total of more than 9,1 mil. TEU

Competition in transshipment is very strong and its future is uncertain

From 2010 Egyptian & Malta ports have taken the lead, while Costantza, Taranto and Piraeus lag behind & Gioia Tauro gaining pace after a downturn

Between 2006 and 2012 NAPA ports grew more than Turkish & Egyptian ports

This notwithstanding, none of the major SEE & East Med container ports is playing a transshipment + gateway role as significant as that played by other ports in Europe



Learning from others' experience



Sea ports & trade corridors

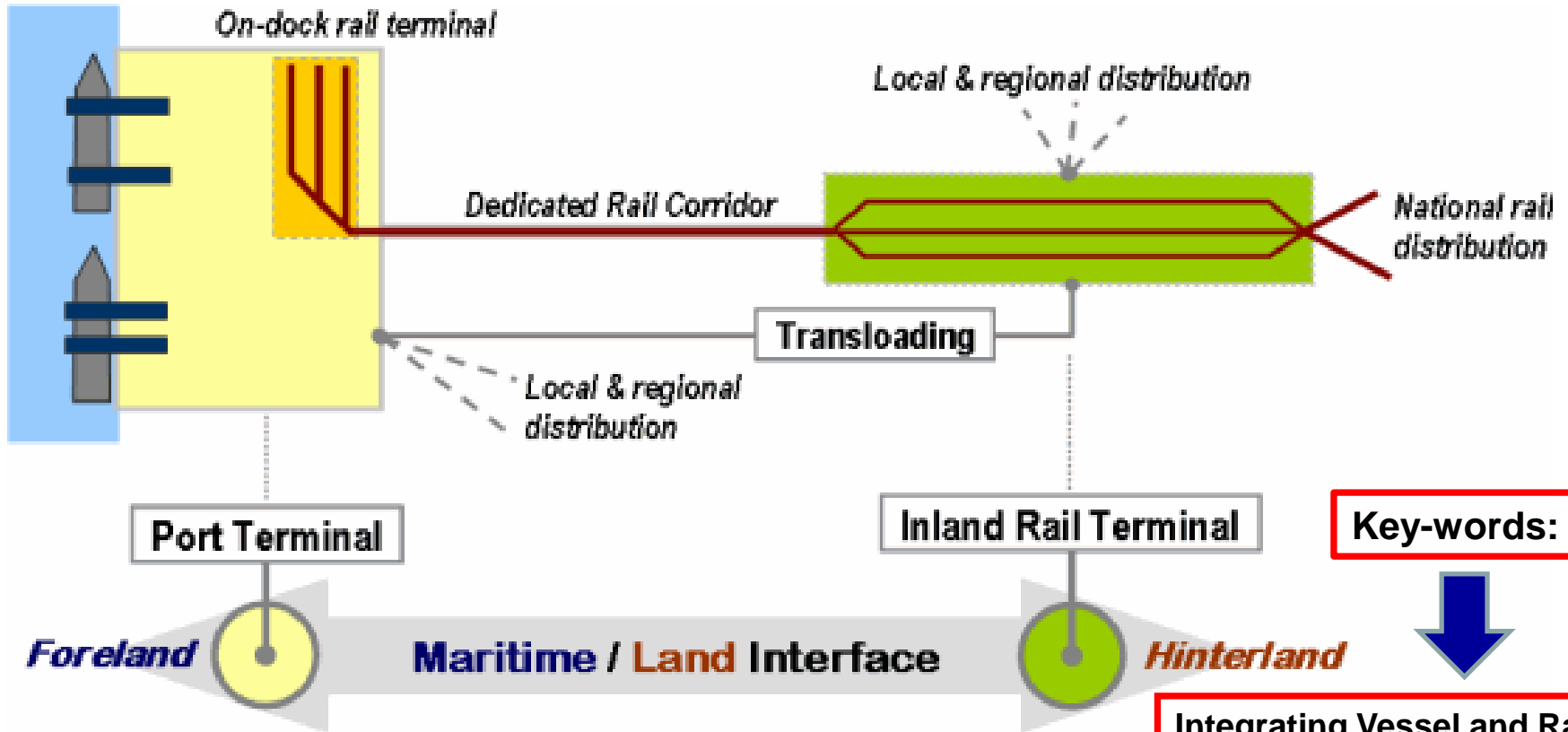
“*BOUNDING TOGETHER SEA AND LAND*”

"A port that increases its capacity "inside the gate", with no corresponding improvements in the approach channels, intermodal connectors and rail, road and marine highway corridors that serve it, will realize little overall capacity improvement"

**From: "America's Ports and Intermodal Transportation System"
US Maritime Organisation
Department of Transportation
Washington, January, 2009**

Sea ports & trade corridors

An example: the *Agile Port System Project* in the US



Source: Department of Global Studies and Geography, Hofstra University, USA

Integrating Vessel and Rail Information Systems

Double stack & train length > 2 Km

Simultaneous Load & Discharge

Sea ports & trade corridors

USA main container ports and their distribution hubs

	Ports	% merchandise distributed in the region	Distribution <i>Hub</i>
1	Los Angeles/Long Beach	33	Chicago
2	New York/New Jersey	80	New York
3	Savannah & Charleston	20	Atlanta
4	Hampton Roads	18	Chicago
5	Oakland	20	Chicago
6	Houston	70	Chicago
7	Seattle/Tacoma	30	Chicago

•Source: Maritime Administration of the US Department of Transportation.

Sea ports & trade corridors

Guess who is challenging the role of the Northern Range ports in the Mediterranean area?

A systemic approach from France

Marseille is becoming a multi-modal - sea, rail, river - hub for bulk and primary commodities, as well as for containers, autos, Ro-Ro, etc., with many destinations in Central Europe

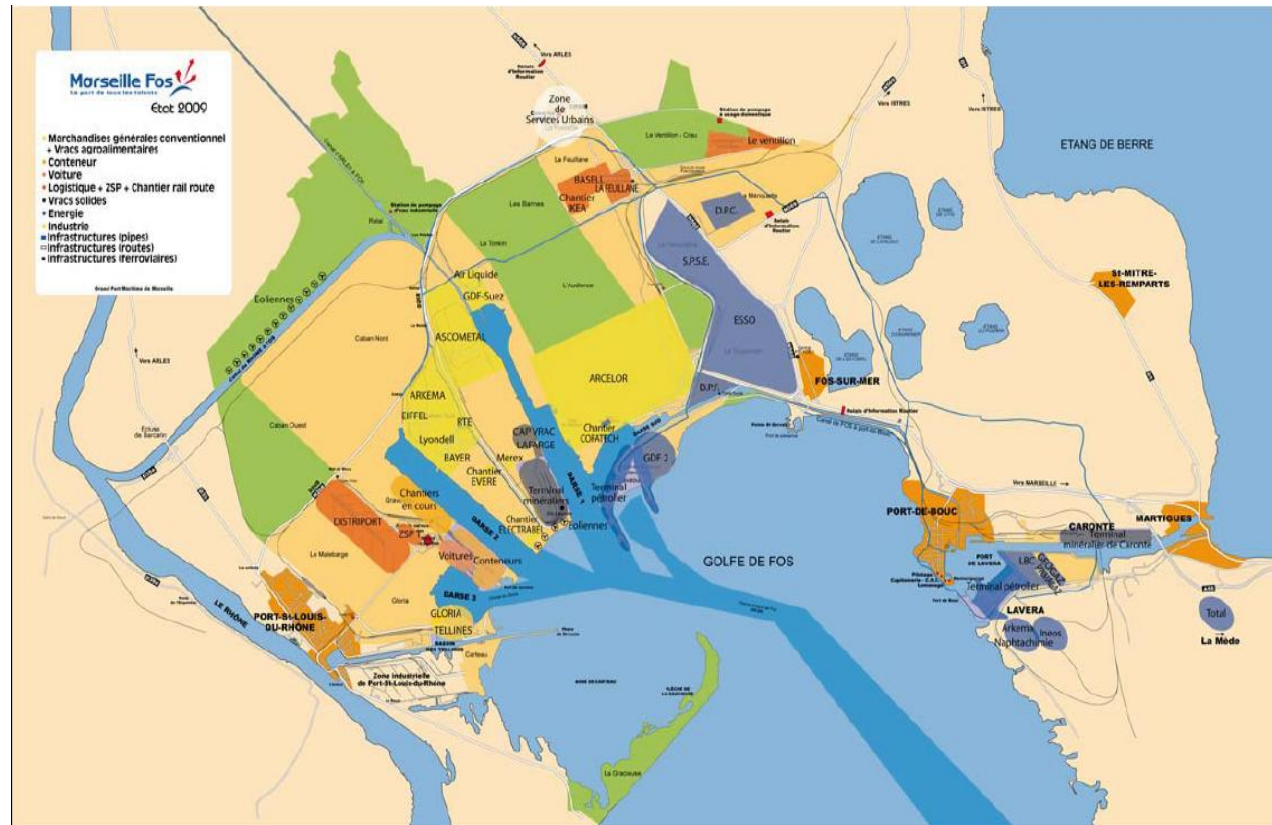


Sea ports & trade corridors

Lay-out of the Port of Marseille: sea – rail – route – river - pipeline

Port of Marseille offers a qualified set of infrastructures and services

Investments of MPA are addressed to upgrade port links by rail, river and pipeline to inland terminal and transport nodes



Lack of natural barriers favor Marseille compared to the Adriatic ports

What is needed to be done ?



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Major hits in the Adriatic region

- **Following a systemic, integrated approach from sea to final land destination**
- **Favoring rail competitiveness: economies of scale, dedicated corridors, adequate tracks for long, heavy trains**
- **Identifying max 1 or 2 priority corridors linking ports to a selected number of hinterland terminals**

What is needed to be done ?

Guarantee adequate sea & land-side infrastructures able to handle vessels from 8 to 10.000 TEU in at least one port in the North Adriatic region

Create conditions to attract public & private resources on a selected number of multimodal transport projects addressed to improve quality of services of intra-regional and international trade flows

Port authorities, transport & logistics operators and rail companies lobbying in Brussels to let approve a EU transport policy based on a multi-gateway port approach

THANK FOR YOUR ATTENTION !!!

..... Marco Spinedi

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