



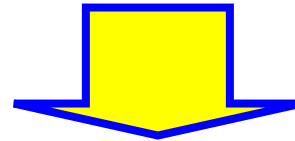
FEEDER, FERRY AND SSS: THE CASE OF THE PORT OF GENOA

Port Net Workshop, Genoa 17th – 20th April 2007

"Feeder, Ferry and Short Sea cargo traffic in the Mediterranean Area"



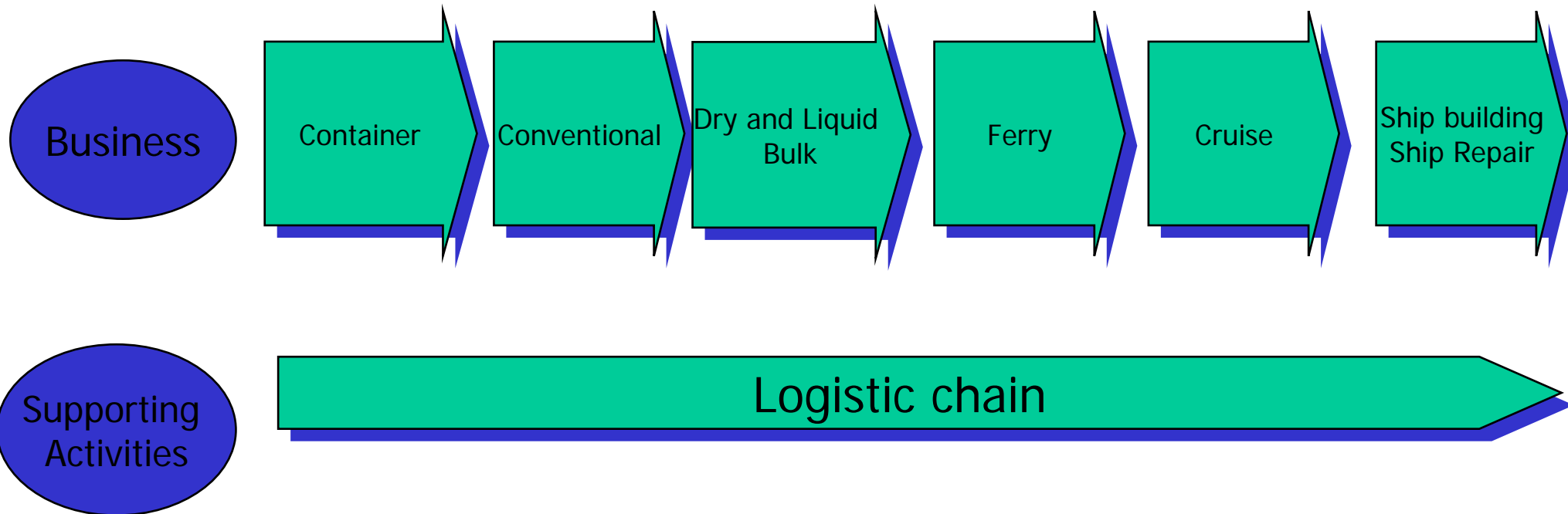
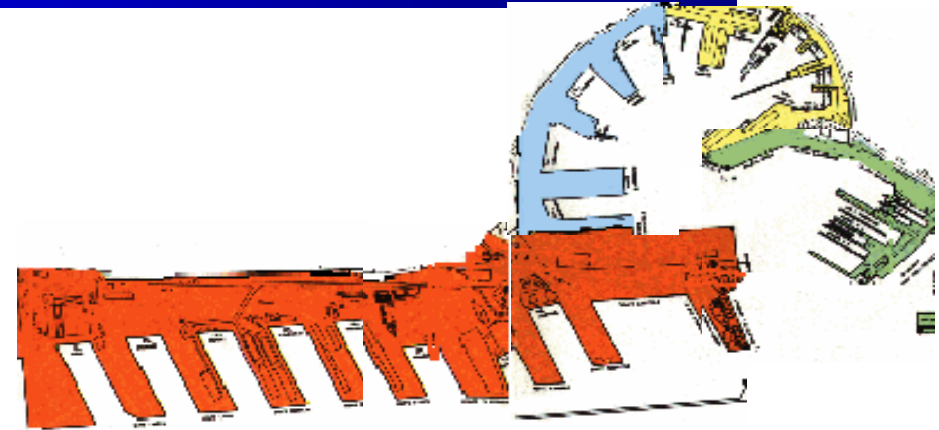
Highlights



- Presentation of the Port of Genoa
- Future developments
- The role of Short Sea Shipping



The Port of Genoa A "multi-business supply" of port handling and back –up services





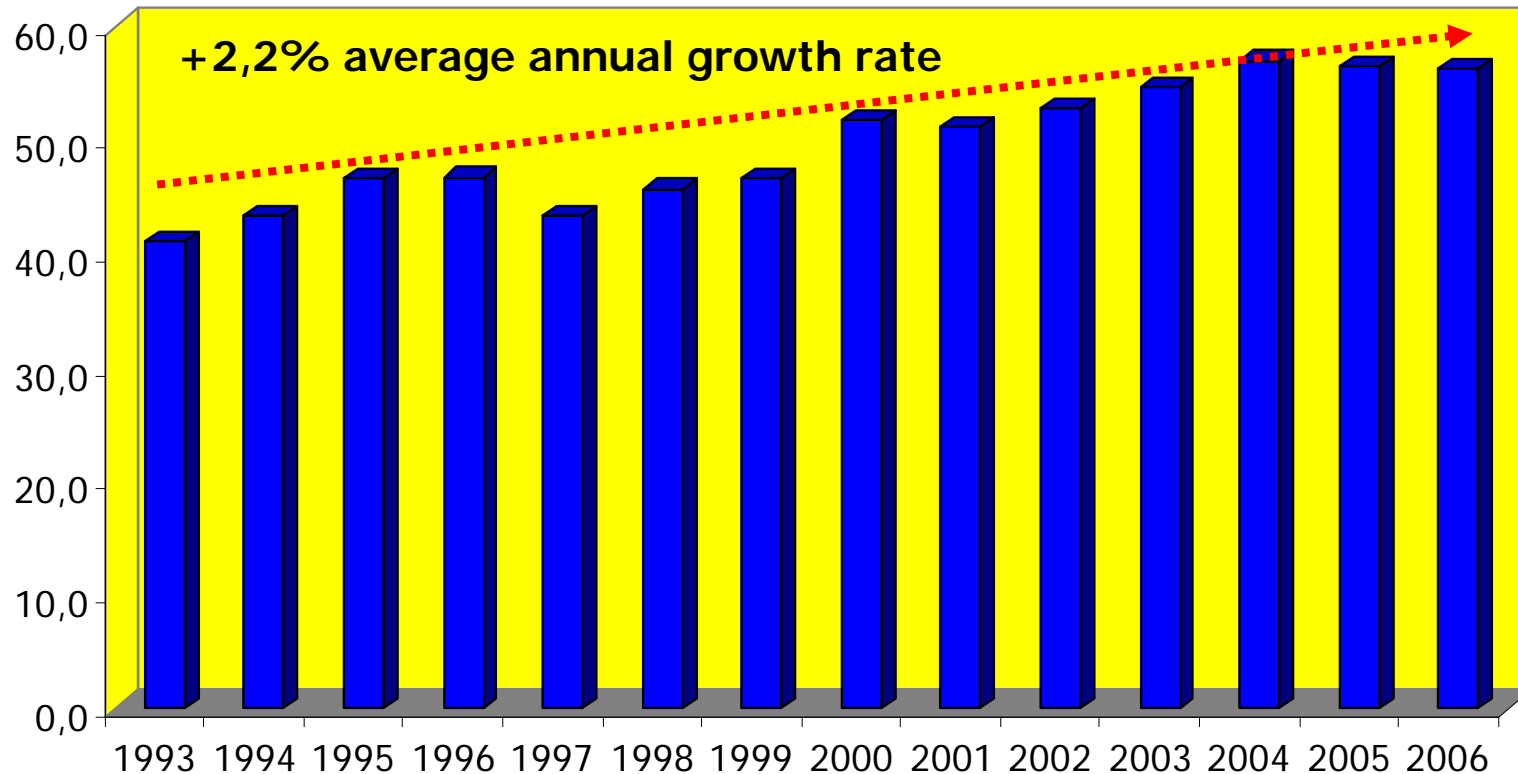








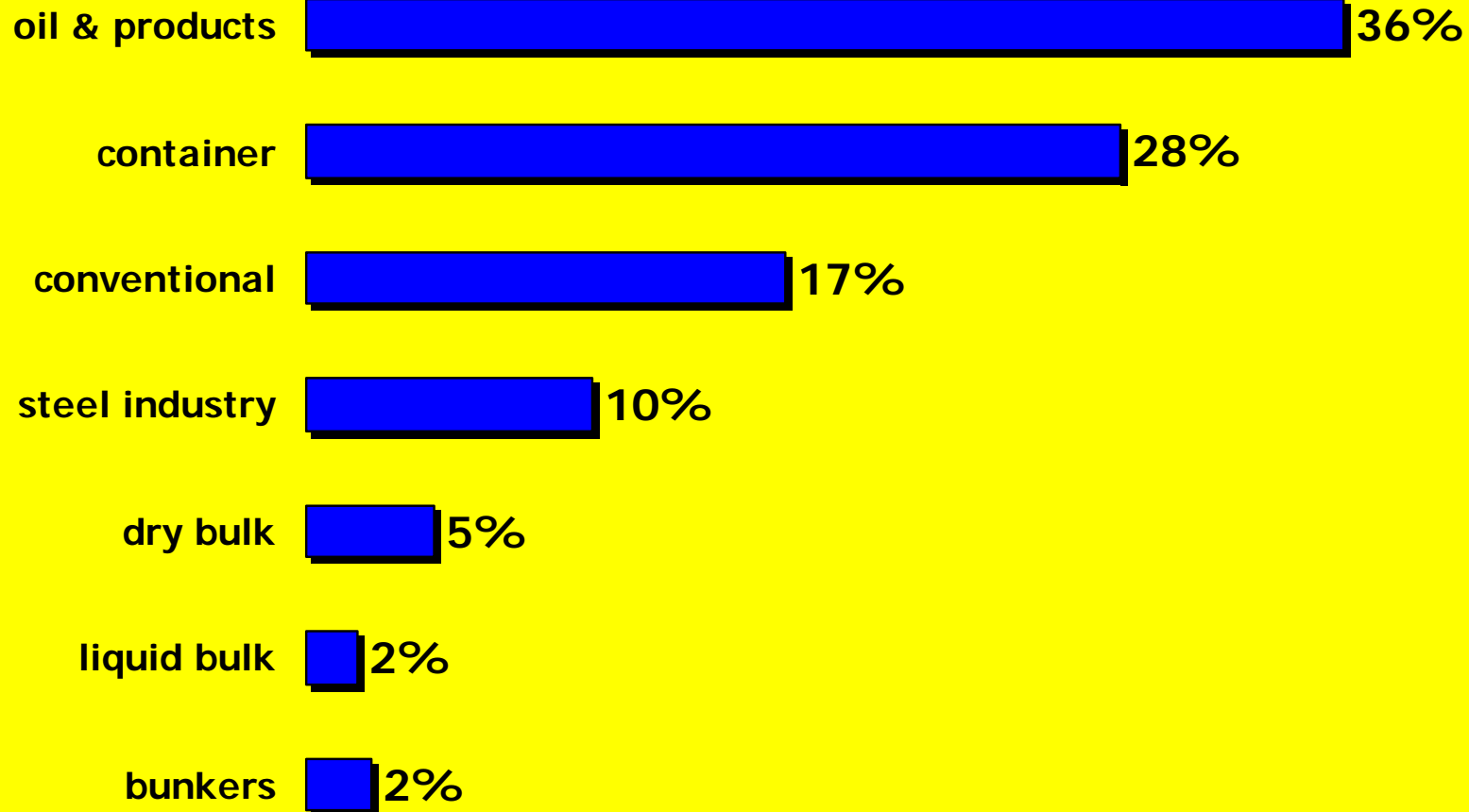
Port of Genoa – Traffic development



Total traffic – approximately 57 million tonnes

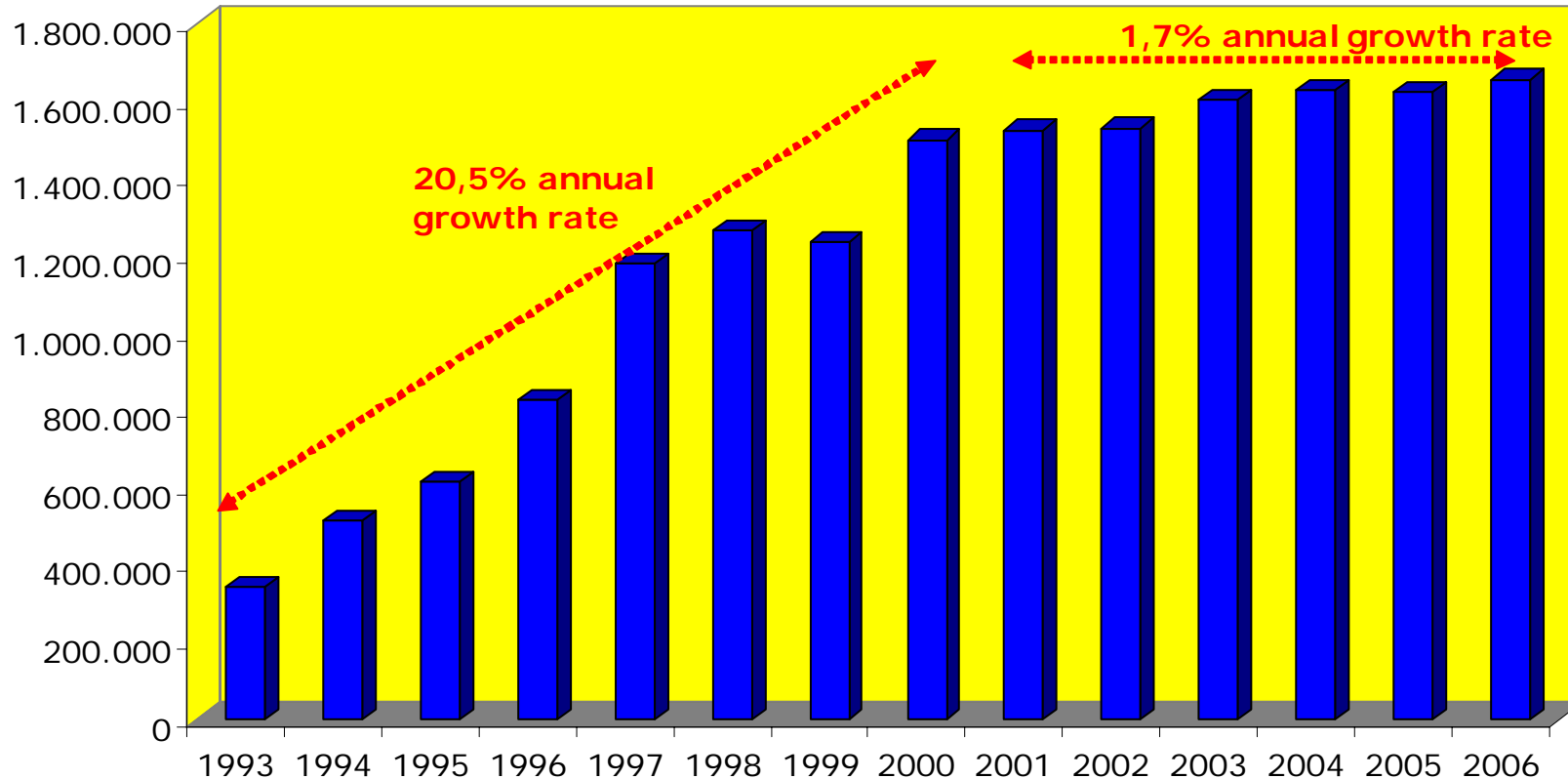


Port of Genoa – Traffic breakdown





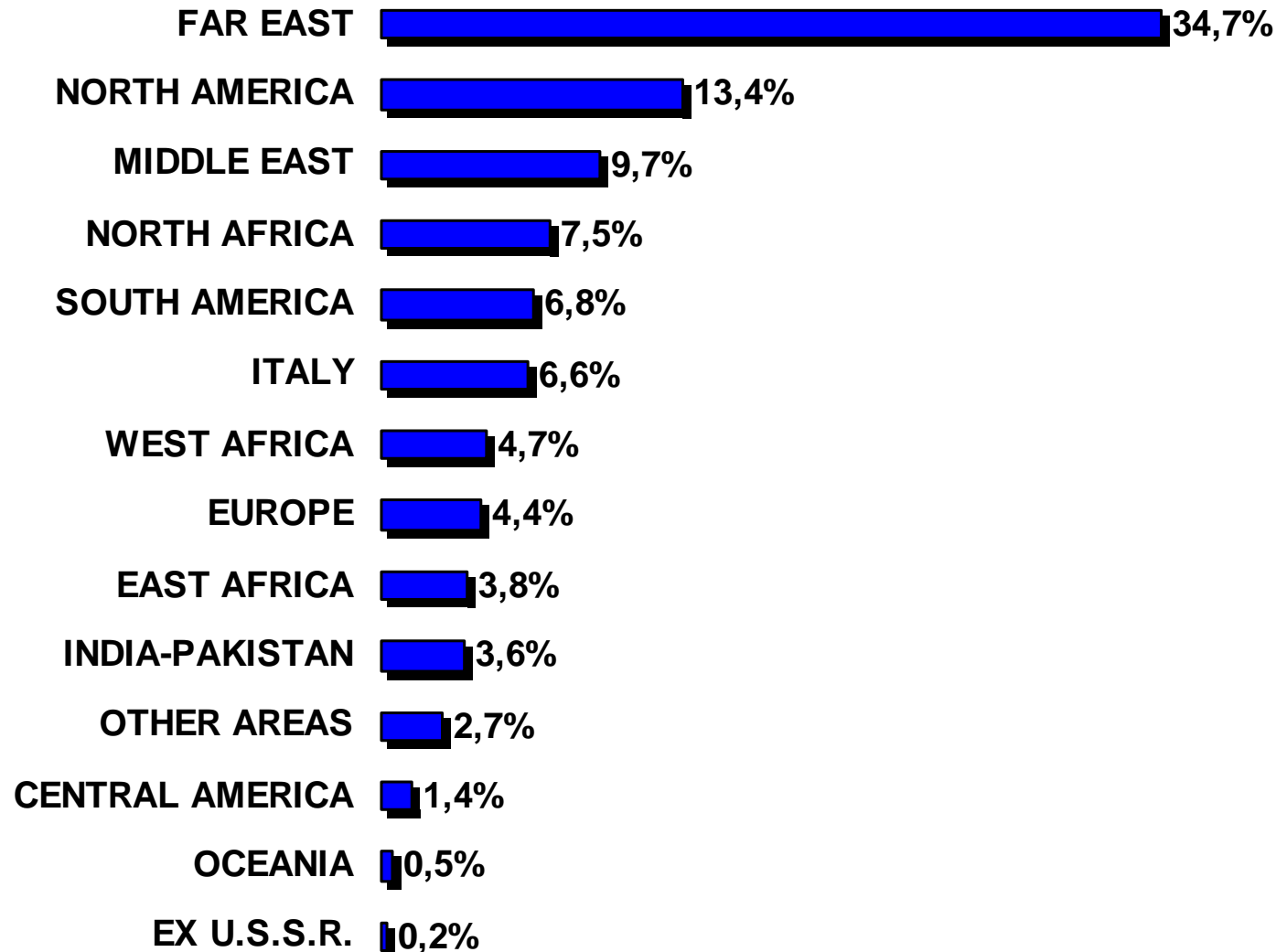
Port of Genoa – Container traffic development



Containerised traffic – approximately 1,6 million TEUs



Origin and Destination of containerised traffic – (2006)





Containerised Traffic development

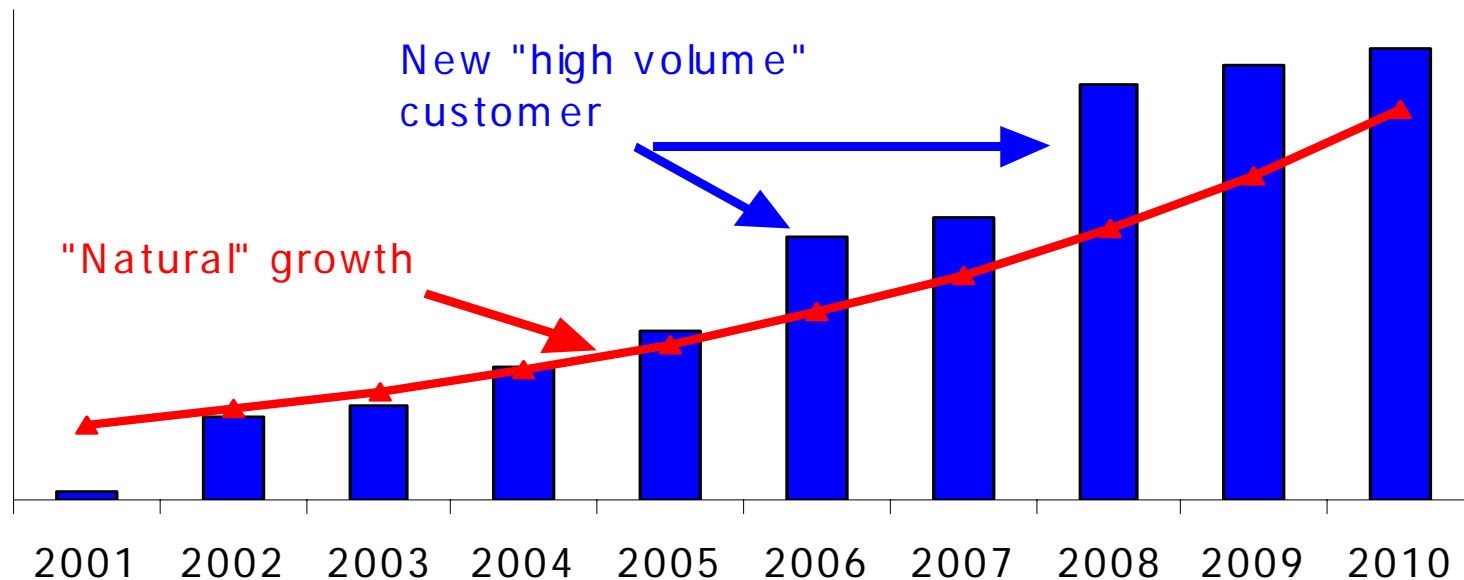
Factors which have influenced the development of container traffic:



- Port privatisation process and port reform of 1994 → improving efficiency and quality
- Italian economic development at the end of the '90s
- Sluggish growth of the Italian economy during the last five years (average annual growth rate of GDP - 0.5%)
- Development of transshipment and re-organisation of cargo flows – the *hub and spoke* concept
- Need for future infrastructural developments in order to fulfil traffic forecasts



- Greater pressure on ports from Global Carriers
- New infrastructure and logistic solutions to enhance the competitive position of the port





Container traffic forecast

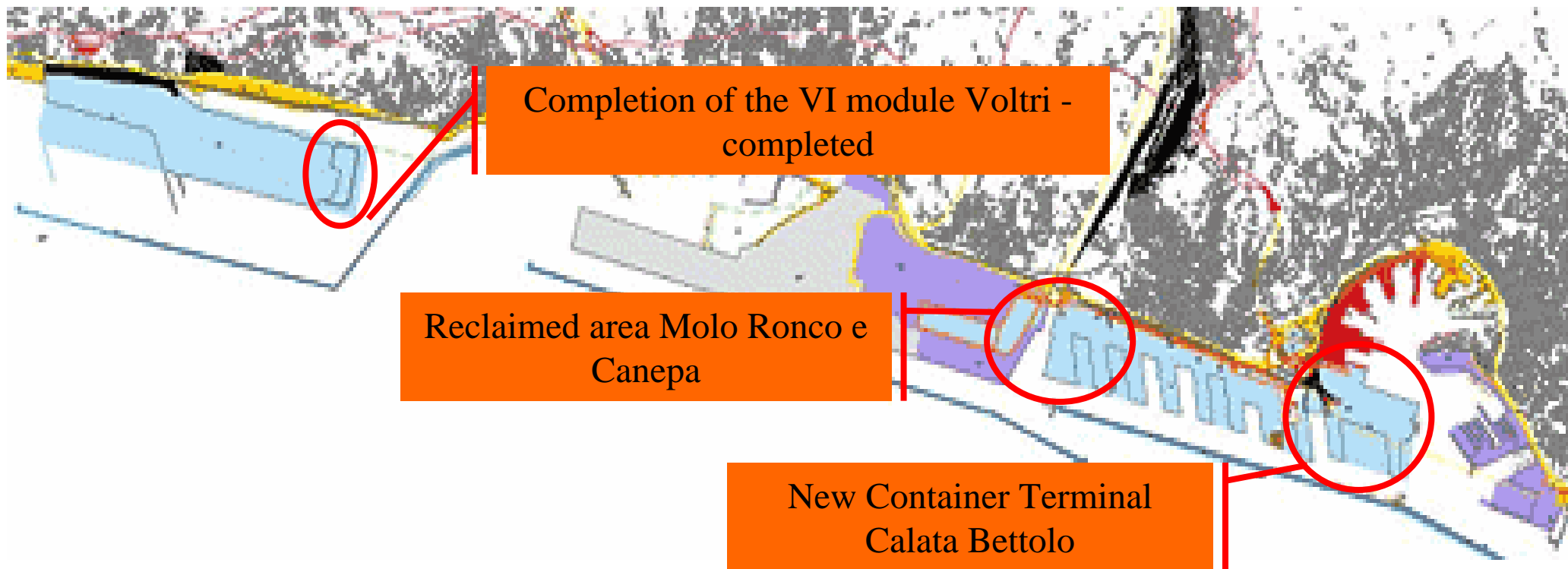


2005 → 1,657,000

	"Base Case" Scenario			"Low Case" scenario		
	I	II	III	I	II	III
2010	2,76	3,24	3,53	2,48	2,94	3,21
2015	3,83	4,61	5,19	3,21	3,92	4,42



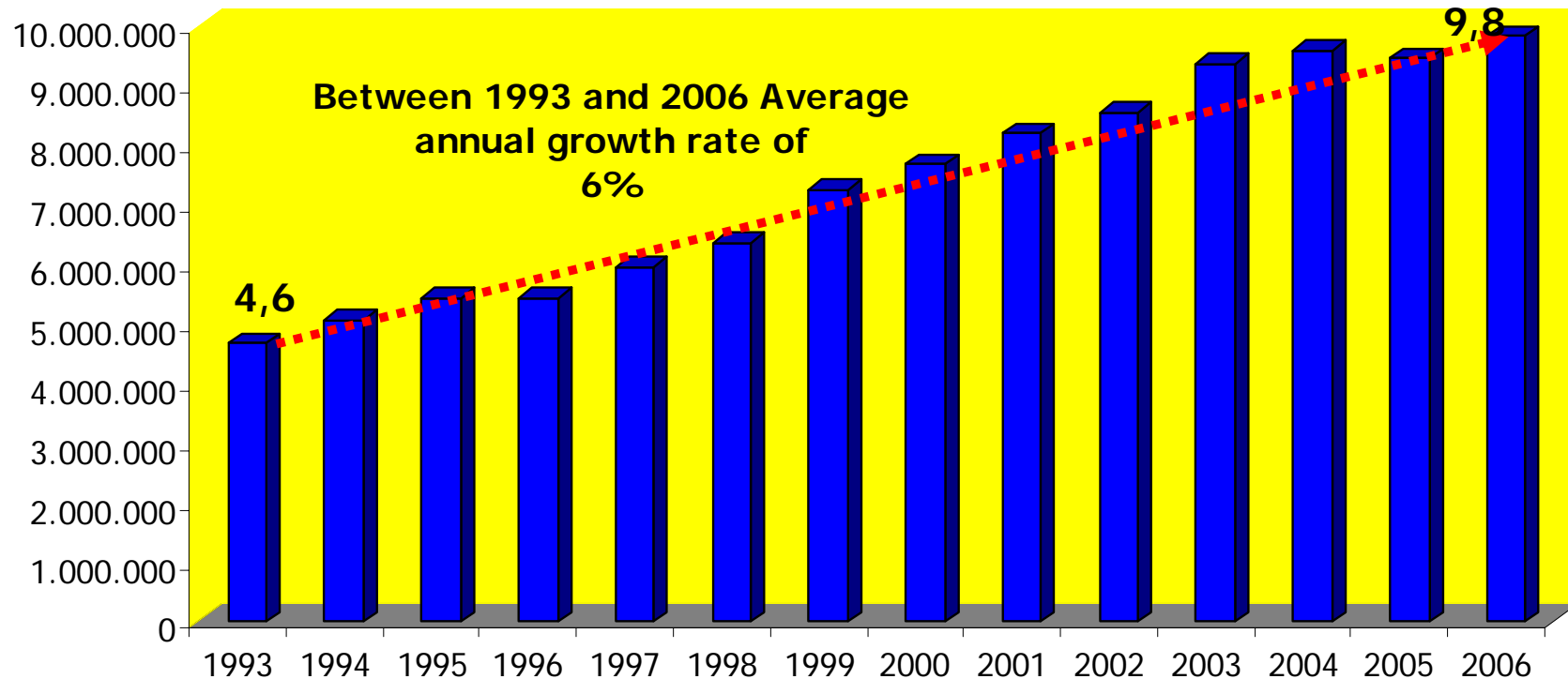
Three projects already planned and financed will ensure a total capacity of 3,000,000 TEUs in 2010-2012





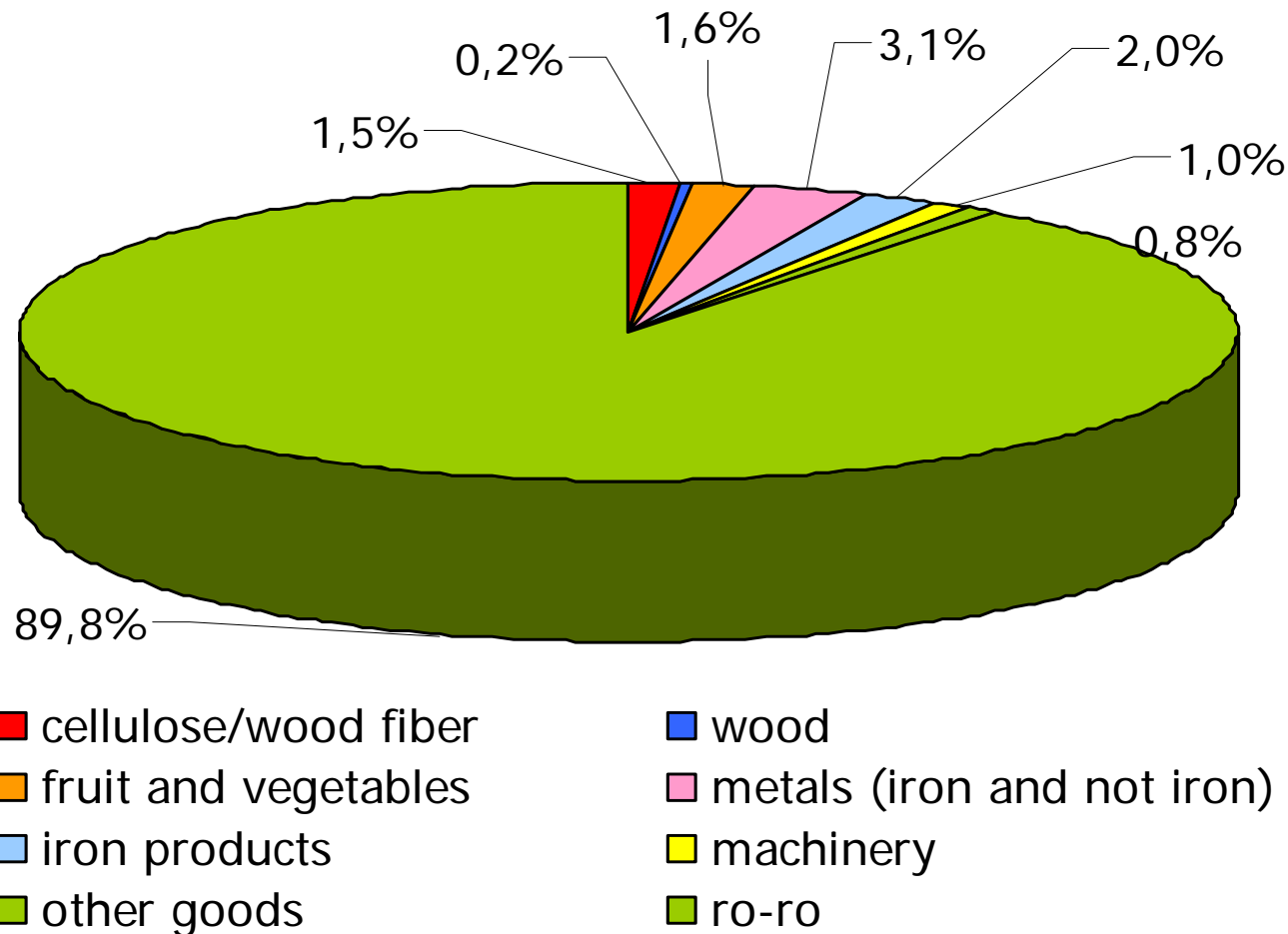
The Port of Genoa is not only focused on the container business

Conventional cargo



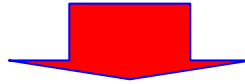


Breakdown of Conventional Cargo





Conventional cargo



- Conventional traffic increased significantly strongly over the last fifteen years, registering an average annual growth rate of 6%
- This growth rate is considerably higher than the average trend reported at an international level
- The Ro-Ro business represents 90% of total traffic and it comprises the following services:
 - Short Sea Shipping (International shipping services)
 - Motorways of the Sea
 - National connections to/from islands

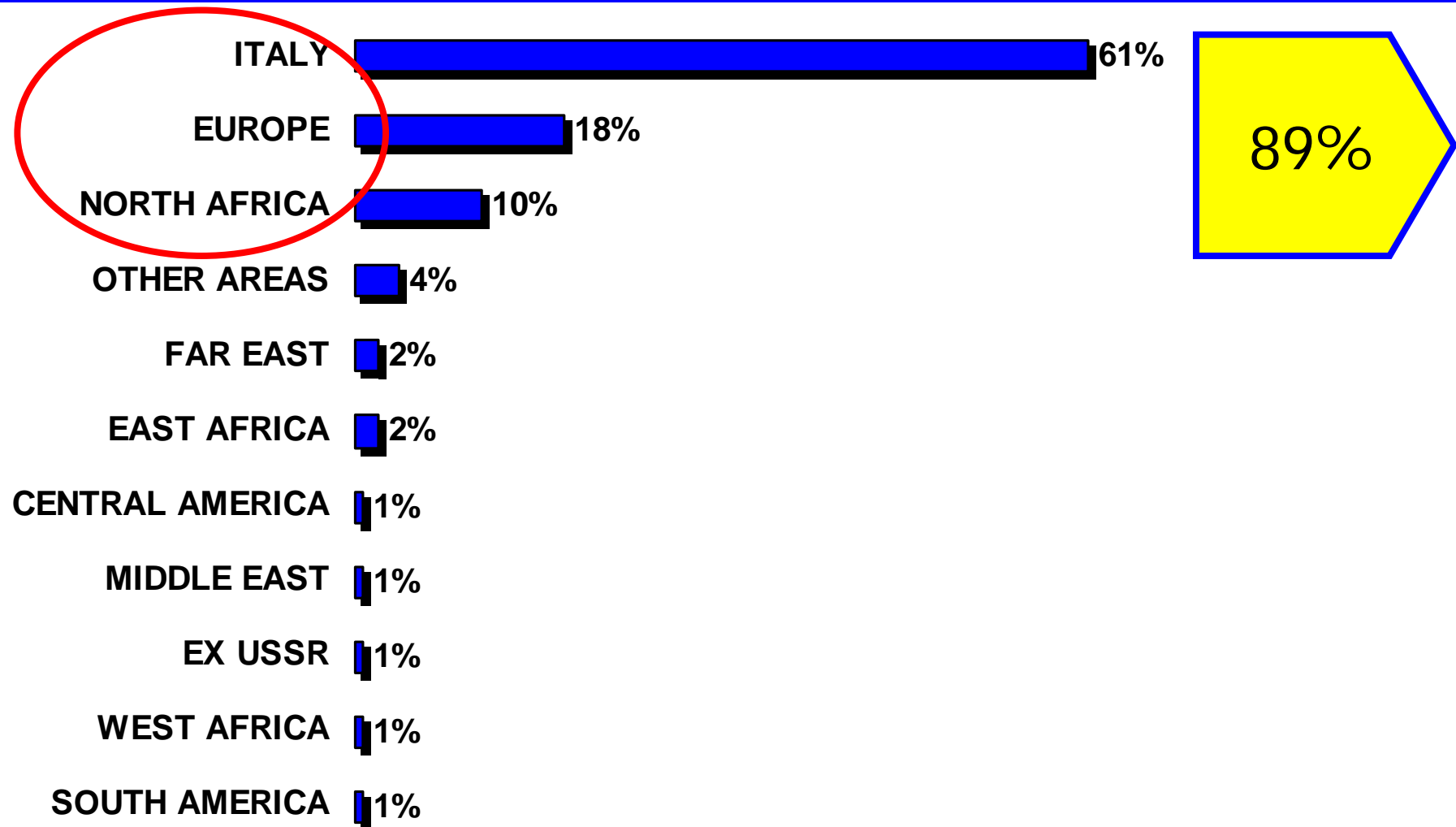


The Port of Genoa manages nearly 50% of total traffic in the Northern Italian Ro-Ro business

Ro-Ro (tons)	2005	%
Genova	7,708,520	48.9%
Livorno	4,258,360	27.,0%
Trieste	1,036,269	6.6%
Venezia	1,600,000	10.1%
Ravenna	748,630	4.7%
Savona	350,422	2.2%
La spezia	64,370	0.4%
<i>Totale</i>	<i>15.766.571</i>	<i>100.0%</i>
<i>Totale Alto Tirreno</i>	<i>12,381,672</i>	
% Genova su Alto Tirreno	62.26%	



Origin and Destination of conventional traffic – (2006)





Port of Genoa – Ferry/Ro-Ro Destinations

Corsica

BASTIA



Sardinia

P. TORRES

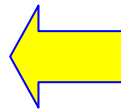
OLBIA

ARBATAX

CAGLIARI

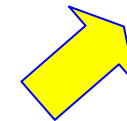
P. TORRES

PALAU



Sicily

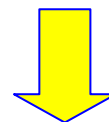
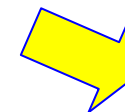
PALERMO



South Med

TUNIS

TANGIER



Spain

BARCELONA



Ro-Ro infrastructure Where?



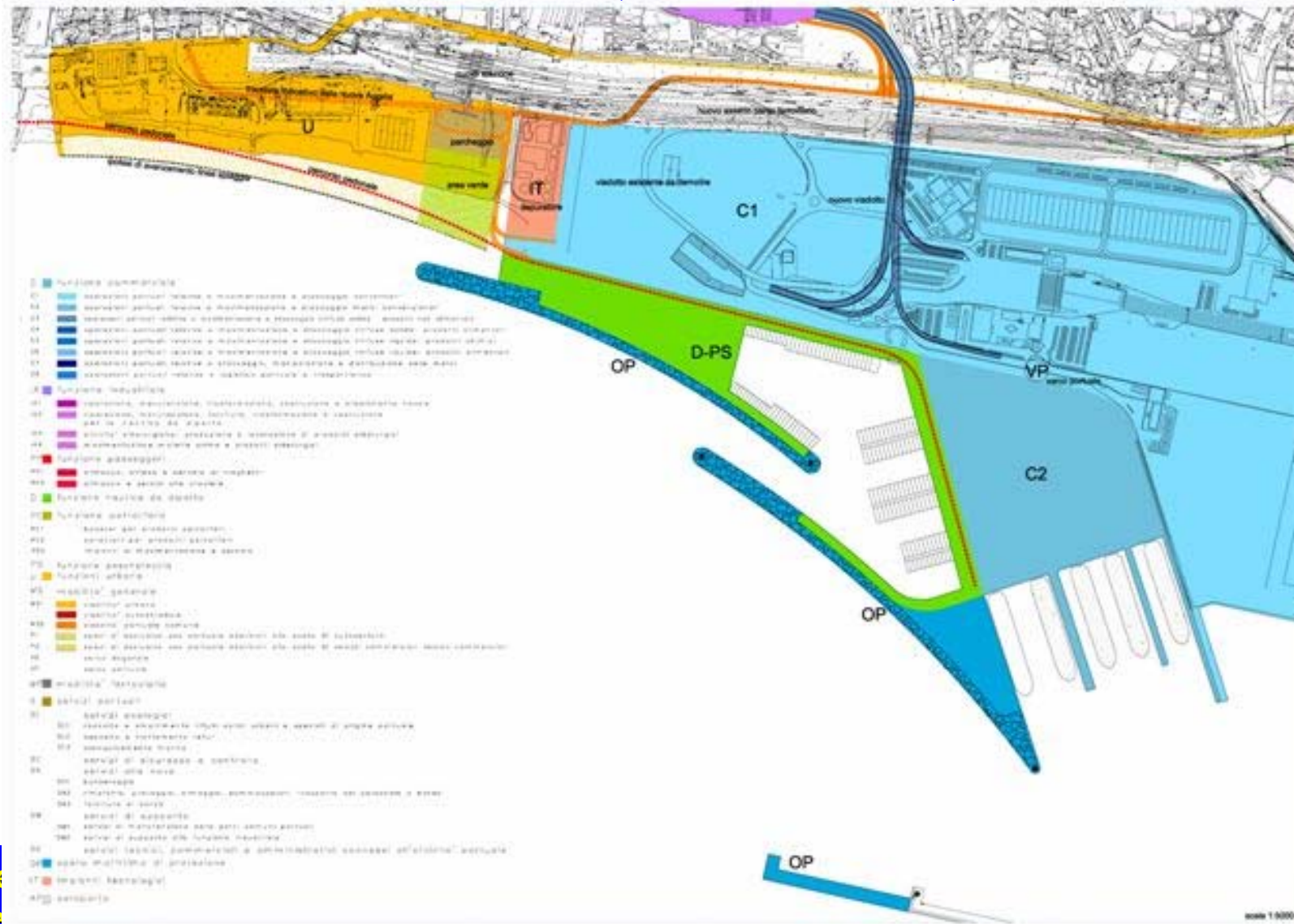


Ro-Ro infrastructure Future developments



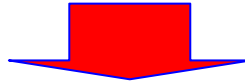
- Voltri - New infrastructure is underway
- 4 new berths dedicated to the development of the Motoways of the Sea /SSS
- 60,000 sqm.
- total capacity of 3 million of linear metres
- consolidation and optimisation of SSS
- traffic forecast – 4% per annum
- investment – 54,3 Million €

Port Name "Feeder"





Logistics and Organisation of Flows



- The management of SSS-Ro Ro business needs to face with different problems: administrative procedures, road transport and connected needs, speed and reliability
 - national connections
 - international transport
- Logistic optimisation of cargo flows from the port to the final destination
- Need to develop new infrastructures and better utilisation.....