



Council of Intermodal Shipping Consultants

# **WORKSHOP ON THE TOPIC: Traffic development of SSS in the Mediterranean Area**

Spokesman: Giordano Bruno Guerrini

Genoa: 18-19-20 April 2007

C.I.S.Co. -Council of Intermodal Shipping Consultants  
Via Garibaldi, 4 - 16124 Genova (Italy)  
[www.ciscoconsultant.it](http://www.ciscoconsultant.it)  
[info@ciscoconsultant.it](mailto:info@ciscoconsultant.it)

# C.I.S.Co.: THE ORIGIN

---

The base idea to set up a corporation to study the “Container” and, later, all the world around it (logistic sector, terminals, ports and so on) comes out of two events, which caused an evolution boost in the transport sector.

- **IMPROVE OF CONTAINER'S TRAFFIC**

In 1966 two American shipping companies, Matson Line and Sea Land, which were active on the routes San Francisco–Hawaii and Newark(New Jersey)–Puertorico, decided to improve their container's traffic started some years before.

- **FIRST CONTAINERSHIP IN EUROPE**

Amsterdam: the first containership of American Export Isbrandtsen Lines docked in the Port of Amsterdam.

# C.I.S.Co.: THE ORIGIN

---

These events were not taken in great consideration by the major part of the European operators. Even though those triggered a revolution in the maritime traffic, they did not receive the right consideration. The subjects involved in this revolution were:

## INVOLVED SUBJECTS:

- Shipowners
- Ports
- Terminals
- Transportation chain
- Industries manufacturing the new unit loads and their handling equipments.
- Leasing industries
- M & R industries
- And so on



# C.I.S.Co.: THE ORIGIN

---

The Port Authority of Genoa, together with the Chamber of Commerce of Genoa, started a project to set up *C.I.S.Co. - Centro Italiano Studi Containers*.

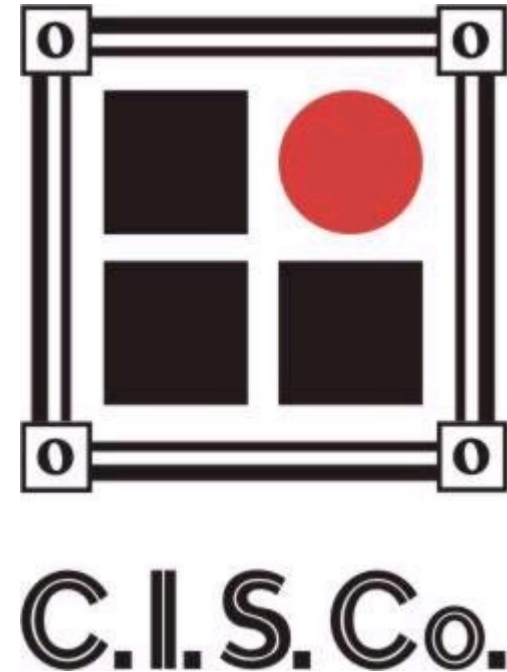


...a non-profit organization to follow up the innovative concept of transportation and to make aware of the change the Italian logistic operators through studies, conferences and technical reports...

# C.I.S.Co.: THE ORIGIN

---

On the 12th April 1967, at the Genoa Chamber of Commerce, 58 representatives of companies and institutions approved the constitution of C.I.S.Co.



After C.I.S.Co. was born, the first container terminal of Mediterranean area was launched in Genoa in 1969

# C.I.S.Co.: THE HISTORY

---

During its forty years of activities C.I.S.Co. has promoted a large number of international conferences, workshops and debates, published monographs on specific technical aspects of containerized traffic. C.I.S.Co. also promotes trips, seminars and technical visits.

## FURTHER

C.I.S.Co. is also the National Reference Office (NRO) for Italy of Bureau International des Containers et du Transport Intermodal in Paris



BUREAU INTERNATIONAL DES  
CONTAINERS ET DU TRASPORT  
INTERMODAL

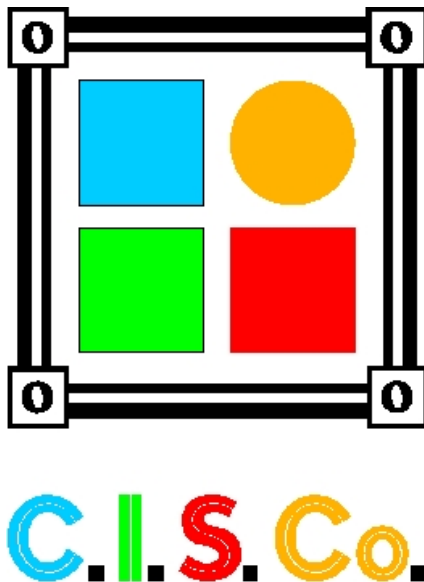
[www.bic-code.org](http://www.bic-code.org)



# C.I.S.Co.: NOWADAYS

---

During 2002 the Representatives of the Council felt the need to revise the profile of the corporation and the intervention fields. The accent was posed on the European, Mediterranean and international logistic challenges. Based on these ideas has been developed a new statutory profile. The new corporate identity (Council of Intermodal Shipping Consultants) cares for continuity of historical brand.



# C.I.S.Co.: NOWADAYS

---

## HOW DO WE WORK

- Collecting data, information, details of experiences
- Examining and checking containerization literature
- Organizing international conferences and events
- Technical visits and study trips

## THE SERVICES

- Information covering all aspects of transport problems
- Technical publications
- Participation in events, conferences, seminars
- Active help for our members
- Presentation of bill's proposal



# SHORT SEA SHIPPING

---



THE IDEA FOR THE WORKSHOP



To study the development of Short Sea Shipping in the Mediterranean and Italian area.

# SHORT SEA SHIPPING: EU-25

For the EU-25 area in 2005 Short Sea Shipping represented the 68% of the entire maritime transport goods<sup>1</sup>.

Forecast 2005-2015<sup>2</sup>

2010 → 27,16%

2015 → 11,37%

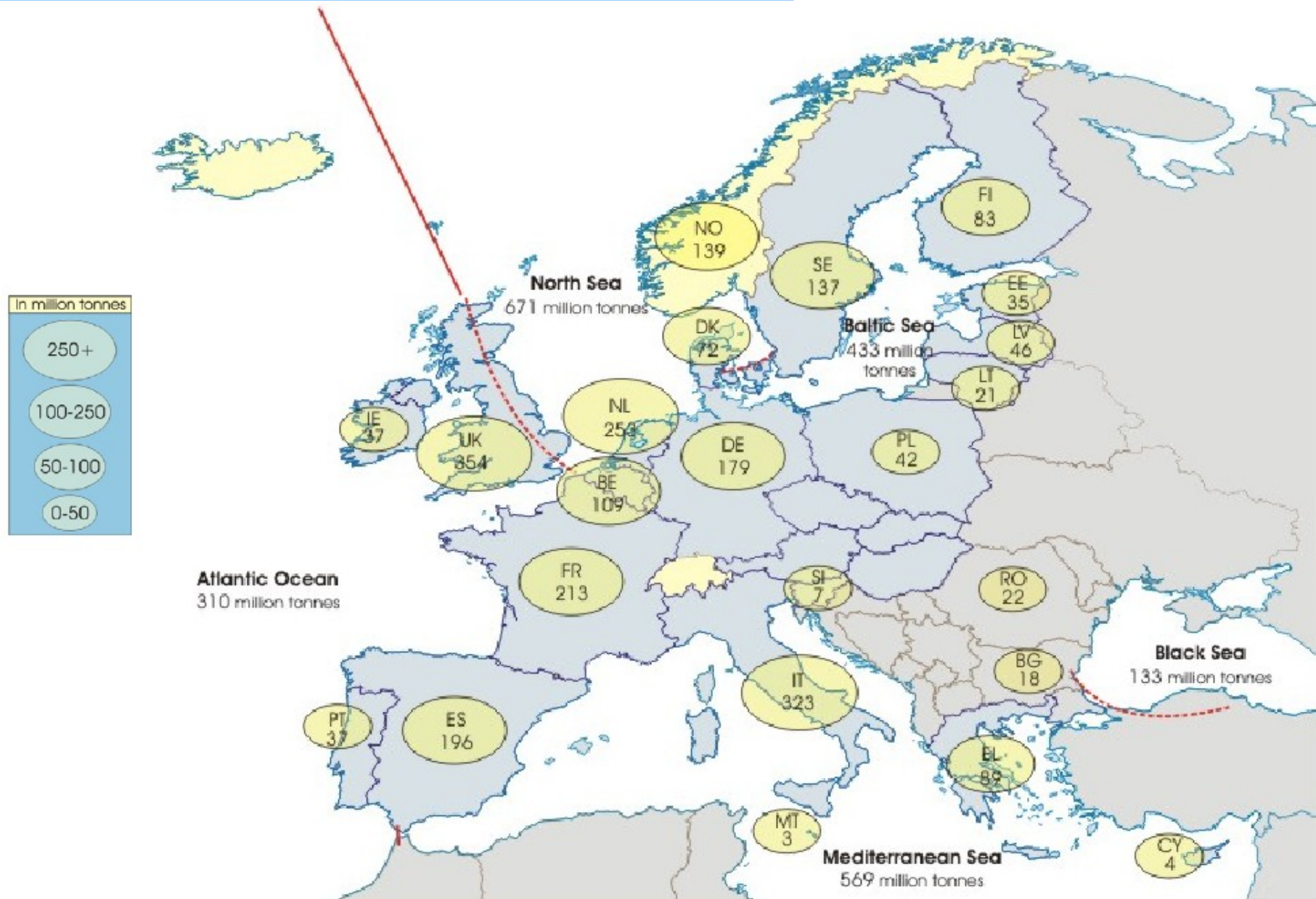


AREA	EU-25, NO, BG, RO	%	2010	2015
North Sea	670.900	33,79	853.116	950.116
Mediterranean	569.500	28,68	724.176	806.515
Baltic Sea	432.800	21,8	550.348	612.923
Atlantic Ocean	309.900	15,61	394.069	438.874
Black Sea	133.400	6,72	169.631	188.919
Other	109.500	5,52	139.240	155.072
<b>TOTAL</b>	<b>2.226.000</b>	<b>100%</b>	<b>2.830.582</b>	<b>3.152.419</b>

(1) Short Sea Shipping of goods 2000-2004, EUROSTAT 04/2006

(2) Source: Global Insight

# SHORT SEA SHIPPING: EU-25



Source: Short Sea Shipping – Promotion Office Italy

# SHORT SEA SHIPPING: MEDITERRANEAN

---

It's interesting to observe, how the Mediterranean Area has a strong influence for the EU-25 countries on the entire volume of transported goods using Short Sea Shipping services<sup>3</sup>.

- Italy ranks first place in the Mediterranean Area (in all Europe it ranks second place after United Kingdom)
- Spain has split itself: 48,41% in the Mediterranean Area and the rest in other areas.
- High traffic value for some Regions of Est Europe.

<sup>(2)</sup> Short Sea Shipping of goods 2000-2004, EUROSTAT 04/2006

# SHORT SEA SHIPPING: MEDITERRANEAN

	kTON	%Country	%Area Med.		kTON	%Country	%Area Med.
<b>Italy</b>	<b>212.657</b>	<b>68,38</b>	<b>38,4%</b>	Norway	4.912	3,67	0,9%
Spain	90.520	48,41	16,3%	Malta	1.980	66	0,4%
Greece	72.927	78,42	13,2%	Sweden	1.830	1,46	0,3%
French	55.995	26,79	10,1%	Finland	1.799	2,02	0,3%
Holland	45.487	17,91	8,2%	Cyprus	1.646	82,3	0,3%
Un. Kingdon	22.833	6,58	4,1%	Poland	1.155	5,78	0,2%
Belgium	22.421	23,11	4,0%	Lithuania	1.126	2,62	0,2%
Germany	13.513	7,77	2,4%	Estonia	1.020	2,76	0,2%
Romania	10.843	57,07	2,0%	Ireland	963	2,75	0,2%
Portugal	10.636	30,39	1,9%	Denmark	590	0,86	0,1%
Slovenia	5.881	84,01	1,1%	Latvia	363	1,65	0,1%
Bulgaria	5.468	32,16	1,0%				<b>100%</b>

Chart: Elaboration C.I.S.Co.: Source: Short Sea Shipping of goods 2000-2004, EUROSTAT 04/2006

# SHORT SEA SHIPPING: ITALY

Italian general development. From these numbers we can extract four consideration<sup>(4)</sup>:

- The general growth depends on the short range shipping (+3,3%)
- The long range shipping decreased (-3,9%)
- Cabotage decreased softly (0,5%)
- Strong increase for the EU internal shipping (+14,9%)

MODE OF TRANSPORT	YEAR 2003			YEAR 2004			VARIATION % 2004/2003		
	Unloading	Loading	Tot.	Unloading	Loading	Tot.	Unloading	Loading	Tot.
<b>Short range</b>	<b>250.735</b>	<b>118.765</b>	<b>369.500</b>	<b>255.425</b>	<b>126.196</b>	<b>381.621</b>	<b>1,9</b>	<b>6,3</b>	<b>3,3</b>
- Cabotage	67.905	67.730	135.635	67.563	67.388	134.951	-0,5	-0,5	-0,5
- European Un. <sup>(5)</sup>	29.839	27.493	57.332	31.594	34.301	65.895	5,9	24,8	14,9
- Other	152.991	23.542	176.533	156.268	24.507	180.775	2,1	4,1	2,4
<b>Long range</b>	<b>84.085</b>	<b>23.444</b>	<b>107.528</b>	<b>82.949</b>	<b>20.414</b>	<b>103.362</b>	<b>-1,4</b>	<b>-12,9</b>	<b>-3,9</b>
<b>TOTAL</b>	<b>334.819</b>	<b>142.209</b>	<b>477.028</b>	<b>338.374</b>	<b>146.610</b>	<b>484.984</b>	<b>1,1</b>	<b>3,1</b>	<b>1,7</b>

<sup>(4)</sup> Short Sea Shipping – Promotion Office Italy

<sup>(5)</sup> The entire volume of traffic of EU includes also the new countries Norway and Ireland

Chart: C.I.S.Co.: Source: Short Sea Shipping – Promotion Office Italy

# SHORT SEA SHIPPING: ITALY

Variation % 2004-2005 for transported goods in the Italian Ports

PORT	Liquid bulk	Dry bulk	Ro-Ro	Containers
Ancona	-6%	+7%	+4%	+13,6%
Bari	+27,7%	-6,0%	n.d.	n.d
Brindisi	-4,85%	+7,31%	-30,24%	+38,78%
Cagliari	-4,57%	-11,73%	n.d.	-0,68%
Civitavecchia	-12,4%	n.d.	+13,7%	+23%
Genova	+7,0%	-3,6%	n.d.	+2%
Gioia Tauro	n.d.	n.d.	n.d.	+16%
La Spezia	+29,2%	+12,4%	n.d.	+6,4%
Livorno	+5,77%	-19,7%	+12,5%	+3,1%
Napoli	-3,2%	-6,1%	n.d.	+13,7%
Palermo				
Ravenna	+9,6%	+14,5%	+8,7%	-3,9%
Salerno	+5,7%	+9,7%	-20,6%	-0,8%
Savona	+3%	+0,8%	n.d.	+162%
Taranto	+1,7%	+14%	n.d.	-6,1%
Trieste	+0,03%	+6,62%	+7,21%	+1,48%
Venezia				+9,1%

# SHORT SEA SHIPPING: ITALY

...the reefer segment

Global Insight foresees for the Mediterranean Area an increase of 22% in next 10 years for the reefer cargo sent from Italy (11.154 in 2005 → 13.605 in 2015).

AREA	2005	2010	2015	Tot. %
South Europe <sup>6</sup>	40.755	51.824	57.716	42%
growth %		27,16%	11,37%	
Mediterranean	11.154	12.924	13.605	22%
growth %		15,86%	5,27%	

Elaboration C.I.S.Co.

<sup>(6)</sup> Africa, Middle East and Mediterranean

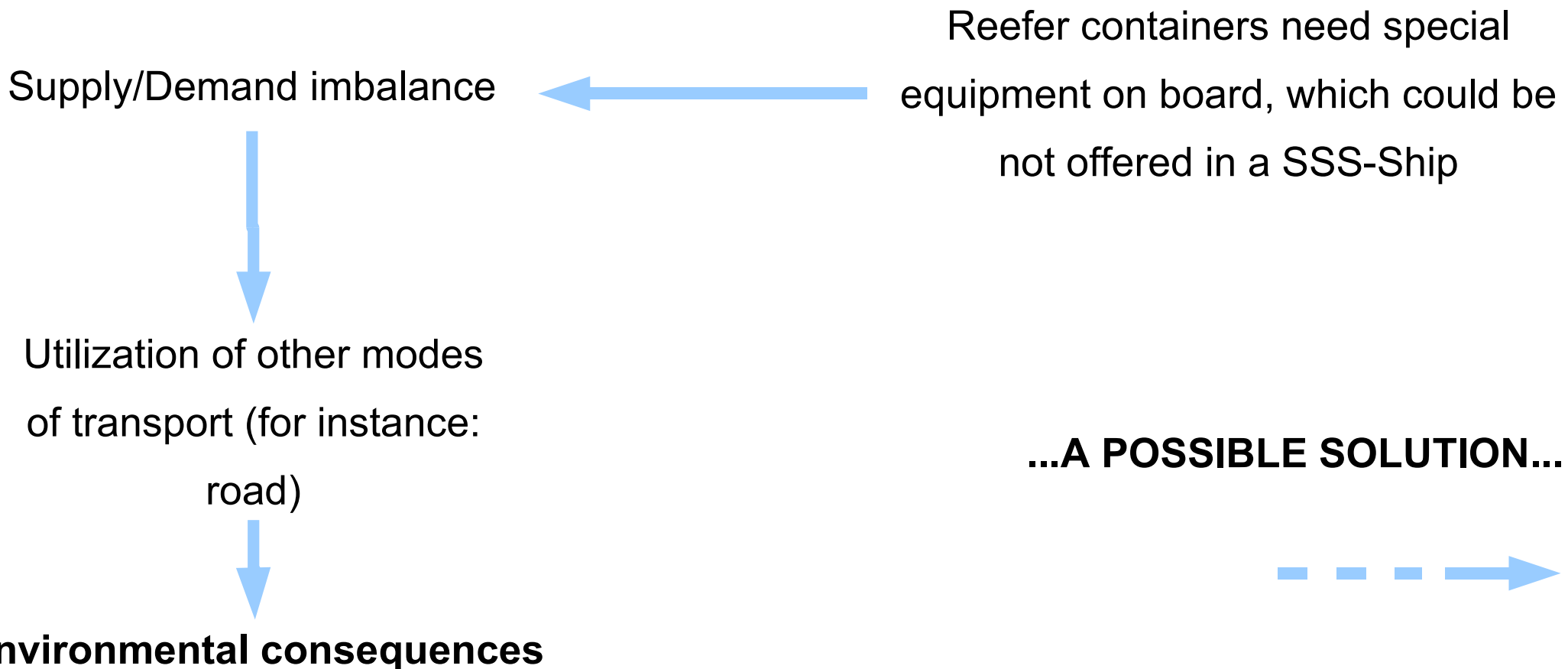


# SHORT SEA SHIPPING: ITALY

---

**...the reefer segment**

The increase in reefer market could cause the increase also for SSS services in the cold transport segment



# SHORT SEA SHIPPING: ITALY

---

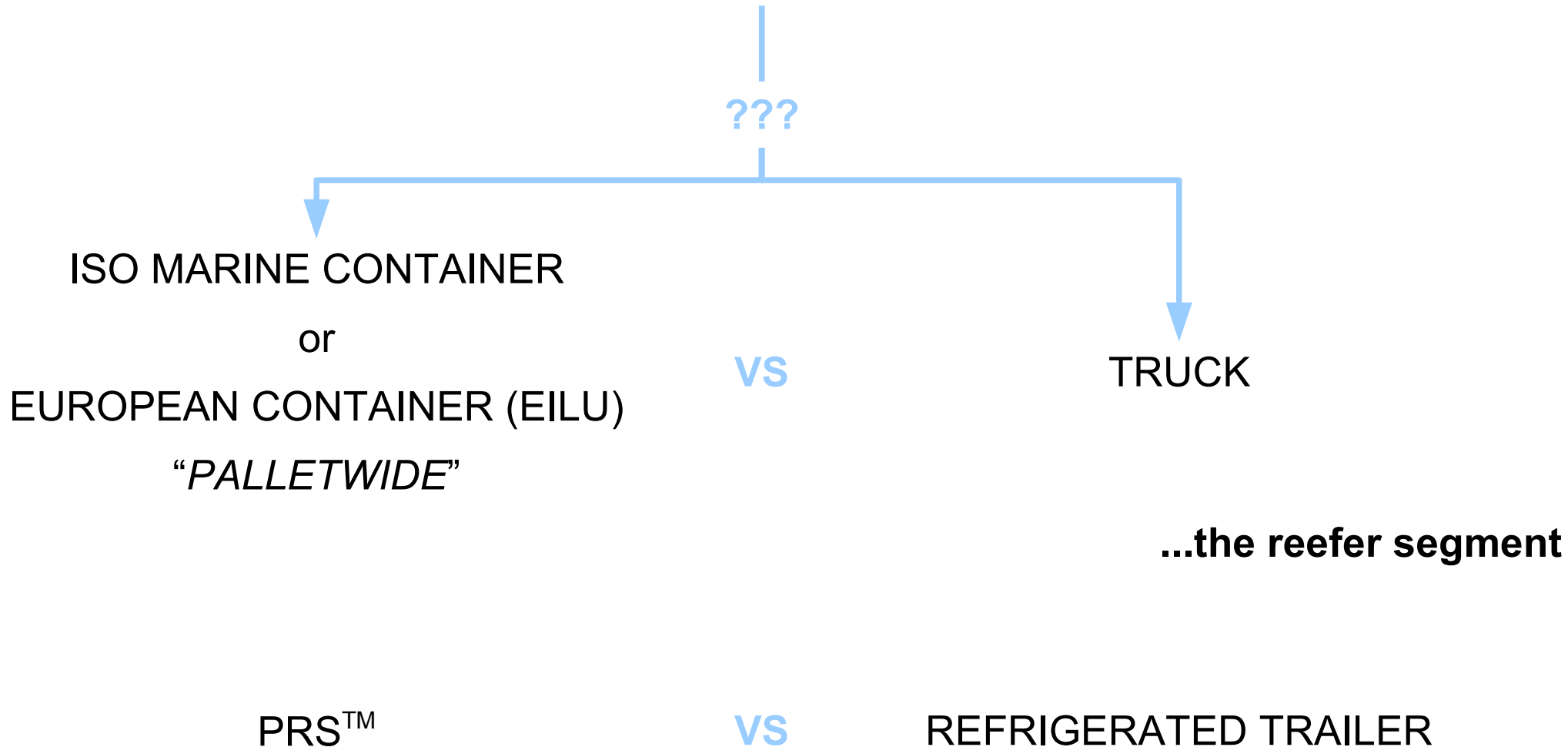
...the reefer segment

...could be the implementation of containers equipped with *PRS<sup>TM</sup> Passive Refrigeration System<sup>TM</sup>*. This container equipped with *Passive Refrigeration System<sup>TM</sup>*, tested more times from reliable institutional corporations, can be easily transported also on those ships without plug-in.

# CHALLENGES

---

The increase of containerized traffic in the Mediterranean Area poses two questions:



# THANKS

---

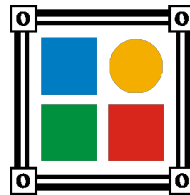
FOR THE INFORMATION AND CHARTS:  
**SHORT SEA SHIPPING**  
**PROMOTION OFFICE ITALY**





Council of Intermodal Shipping Consultants

THANK YOU FOR YOUR  
ATTENTION



C.I.S.Co. -Council of Intermodal Shipping Consultants  
Via Garibaldi, 4 - 16124 Genova (Italy)  
[www.ciscoconsultant.it](http://www.ciscoconsultant.it)  
[info@ciscoconsultant.it](mailto:info@ciscoconsultant.it)