

POTENTIAL OF SSS IN THE MEDITERRANEAN BASIN

Mercedes de Juan
Fundación Valenciaport

Virtual, 28 April 2021

INDEX

1. Introduction

- A. The port of Valencia in figures
- B. Advantages of Short Sea Shipping

2. Short sea shipping trends, statistics. Market insights

- A. In Europe
- B. By region

3. Developments on SSS from the viewpoint of a port

- A. SSS Challenges.
- B. Role of the Port Authorities

THE PORT OF VALENCIA. FIGURES

Highly diversified traffic. Specialized in containers

	Monthly	Δ20/19	Accumulated
Tons	7.226.777	17,60% ▲	80.544.637
TEU	485.404	17,23% ▲	5.428.307
Vehicles	55.092	7,27% ▲	533.137
Passengers	24.615	-58,76% ▼	419.121

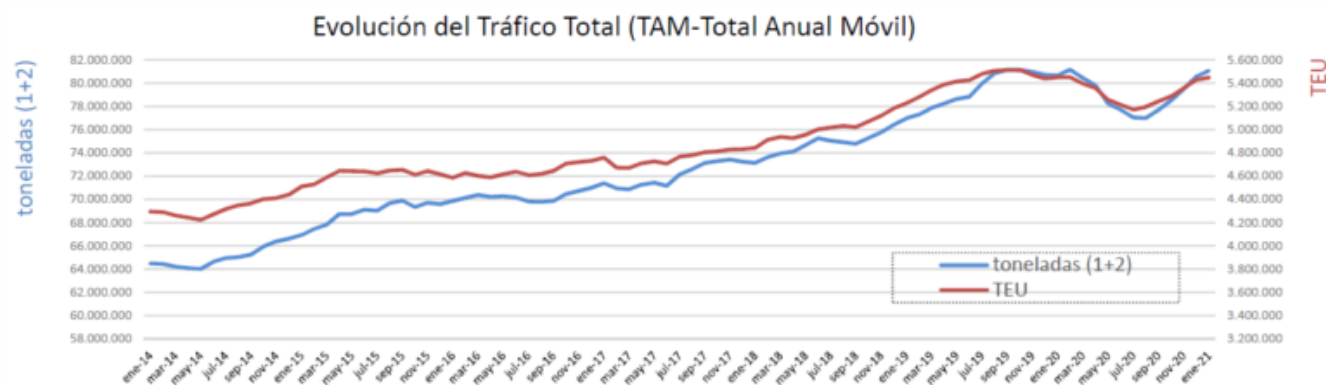
Import/export represents close to 50%

Goods Traffic (MTs)

	2019	2020	Difference	%
Loading/Unloading	44,019,821	41,177,989	-2,841,832	-6.46%
Loading	24,530,976	23,463,440	-1,067,536	-4.35%
Unloading	19,488,845	17,714,549	-1,774,296	-9.10%
Transit	36,707,918	39,366,648	2,658,730	7.24%
TOTAL	80,727,739	80,544,637	-183,102	-0.23%

THE PORT OF VALENCIA. FIGURES

Highly diversified traffic. Specialized in containers



THE PORT OF VALENCIA. FIGURES

Nearly 30% of total traffic originates in or is destined for the Mediterranean

10.1 Traffic by Geographical Areas (t)



	2019	2020			TOTAL
		Loaded	Unloaded	Transshipment	
MEDITERRANEAN SEA AND BLACK SEA	23.221.492	5.166.073	5.226.096	11.965.969	22.358.138
FAR EAST	9.602.942	2.412.928	3.680.170	3.133.856	9.226.954
SPAIN	10.134.161	4.881.763	2.478.046	1.855.328	9.215.137
WEST AFRICA	4.980.450	1.963.382	924.133	3.071.524	5.959.039
INDIA-PAKISTAN-BANGLA-DESH-SRI LANKA	3.886.561	498.338	673.865	3.571.223	4.743.426
USA (SOUTH ATLANTIC AND GULF)	4.199.444	787.891	605.686	2.206.124	3.599.701
SOUTH AMERICA (ATLANTIC OCEAN)	3.910.070	453.283	457.138	2.605.887	3.516.308
ARABIAN GULF	3.360.201	1.338.847	522.566	1.476.664	3.338.077
ATLANTIC EUROPE	3.172.978	1.090.534	751.183	1.413.090	3.254.807
MEXICO-CENTRAL AMERICA (CARIBBEAN SEA)	3.277.002	1.314.649	463.096	1.142.972	2.920.717
CANADA-USA (NORTH ATLANTIC)	2.646.534	833.415	286.202	1.588.703	2.708.320
CANADA-USA (GREAT LAKES)	1.240.273	237.719	106.992	1.803.883	2.148.594
CANADA-USA (PACIFIC OCEAN)	1.494.138	332.935	138.689	1.318.533	1.790.157
CENTRAL AND SOUTH AMERICA (PACIFIC OCEAN)	1.441.538	499.092	338.119	848.951	1.686.162
RED SEA	1.146.573	681.333	127.473	548.608	1.357.414
BALTIC COUNTRIES	1.118.133	331.456	318.073	272.352	921.881
SOUTH AND EAST AFRICA	632.551	283.159	178.795	189.113	651.067
UNKNOWN (TARES)	567.537	97.749	325.172	61.005	483.926
AUSTRALIA	402.768	199.107	23.374	227.483	449.964
NEW ZELAND	152.919	59.787	17.606	65.380	142.773
TOTAL	80.727.739	23.463.440	17.714.549	39.366.648	80.544.637

ADVANTAGES OF SSS

The ship as an alternative infrastructure to the road that allows road haulier/freight forwarder to "exchange km for sea miles", traveling on board the ship, with the following advantages:

1. Saving time and money.
2. Increase the competitiveness of the final costumer by reducing the logistic cost.
3. With less environmental impact, something increasingly valued by end users.
4. Dealing with main road transport constrains:
 - Shorter transport times (less impact of driving and resting time regulations).
 - Better quality of life for the driver.
 - Less influence of fuel prices.
 - Less dependence on land transport infrastructures.
 - Avoids bottlenecks and traffic restrictions.
 - Reduced risk of penalties.
 - Increased security: less risk of theft.

ADVANTAGES OF SSS

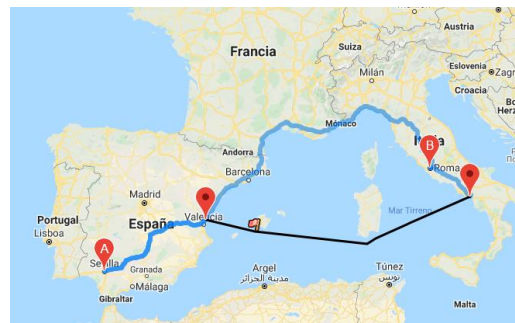


Cadena de Transporte sólo por carretera /Only Road' transport Chain

Orig-Dest/From-To	Cost. (Eur)	Tiempo/Transit-Time (Hor)	Dist. (Km)	Cost.Ext/Ext.Cost (Eur)	Emis C02 (Kg)
Madrid → Turin	1,546	27.2	1,473	700	1,410

Cadena Tte Marítimo Corta Dist.(TMCD) /Short Sea Shipping(SSS) Chain

Orig-Dest/From-To	Cost. (Eur)	Tiempo/Transit-Time (Hor)	Dist. (Km)	Cost.Ext/Ext.Cost (Eur)	Emis C02 (Kg)
Madrid → Barcelona	590	7.7	621	295	595
Barcelona → Génova	450	20.0	652	78	657
Génova → Turin	171	1.9	171	81	164
Total: Madrid *** Turin	1,211	29.6	1,444	454	1,416



Cadena de Transporte sólo por carretera /Only Road' transport Chain

Orig-Dest/From-To	Cost. (Eur)	Tiempo/Transit-Time (Hor)	Dist. (Km)	Cost.Ext/Ext.Cost (Eur)	Emis C02 (Kg)
Sevilla → Roma	2,459	47.7	2,342	1,112	2,242

Cadena Tte Marítimo Corta Dist.(TMCD) /Short Sea Shipping(SSS) Chain

Orig-Dest/From-To	Cost. (Eur)	Tiempo/Transit-Time (Hor)	Dist. (Km)	Cost.Ext/Ext.Cost (Eur)	Emis C02 (Kg)
Sevilla → Sagunto	641	8.2	675	320	646
Sagunto → Salerno	1,139	48.0	1,315	157	1,325
Salerno → Roma	267	3.0	267	127	256
Total: Sevilla *** Roma	2,047	59.2	2,257	604	2,227

Cost of externalities: Congestion, accidents, pollution, climate change, noise, infrastructures, etc.

INDEX

1. Introduction

- A. The port of Valencia
- B. Advantages of Short Sea Shipping

2. Short sea shipping trends, statistics. Market insights

3. In Europe

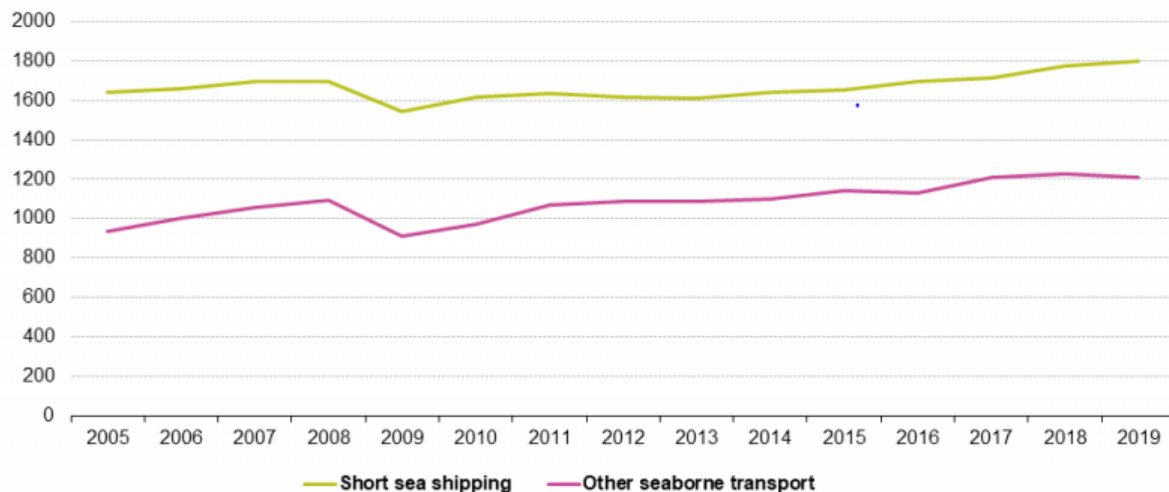
- A. By Region

4. Developments on SSS from the viewpoint of a port

- A. SSS Challenges.
- B. Role of the Port Authorities

FIGURES IN EUROPE

Gross weight of seaborne freight transported to/from main ports by type of shipping, EU-27, 2005-2019
(million tonnes)



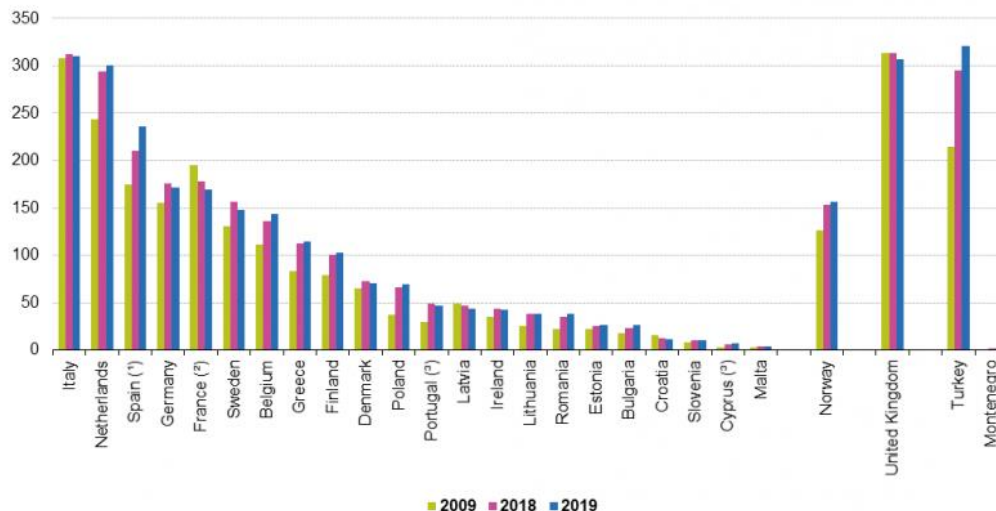
Note: The data reported for certain periods contain a significant share of declarations to and from unknown ports (see methodological notes).

Source: Eurostat (online data code: mar_sg_am_cw)

eurostat 

FIGURES IN EUROPE

Short sea shipping of freight, 2009, 2018 and 2019
(million tonnes)



Note: Czechia, Luxembourg, Hungary, Austria, Slovakia and the EFTA countries Liechtenstein and Switzerland have no maritime ports. Countries are ranked based on 2019 data.

⁽¹⁾ 2018 data contain a significant share of declarations to and from unknown ports (see methodological notes).

⁽²⁾ 2009 data are partially estimated by Eurostat.

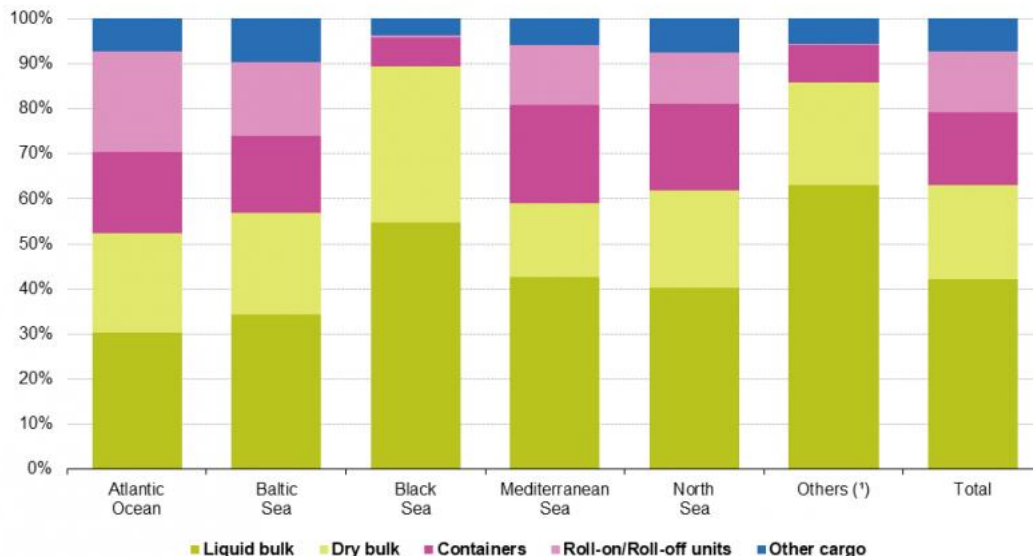
⁽³⁾ 2009 data contain a significant share of declarations to and from unknown ports (see methodological notes).

Source: Eurostat (online data code: mar_sg_am_cw)

FIGURES IN EUROPE

Short sea shipping of freight by type of cargo for each sea region of partner ports, EU-27, 2019

(% share in tonnes)



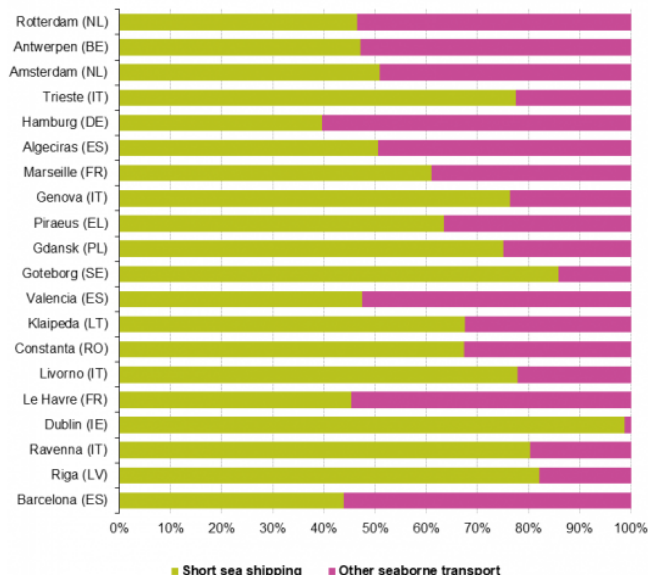
(*) Non-identified ports of Denmark, Germany, Spain, France, Sweden, the United Kingdom, Turkey, Egypt, Israel, Morocco and Russia; river ports of EU countries (see methodological notes).

Source: Eurostat (online data code: mar_sg_am_ewx)

eurostat

FIGURES IN EUROPE

Short sea shipping of freight in total sea transport for top 20 short sea shipping EU-27 ports, 2019
(% share in tonnes)



Source: Eurostat (online data code: mar_sg_am_pw)

eurostat

Size of this preview: 531 × 599 pixels.

Eight of the main deep sea hub ports, Rotterdam, Antwerpen, Amsterdam, Hamburg, Algeciras, Le Havre, Valencia and Barcelona, handled more deep sea shipping than short sea shipping of goods.

By contrast, all the other top 20 ports for short sea shipping handled more short sea shipped goods than deep sea shipped goods

INDEX

1. Introduction

- A. The port of Valencia
- B. Advantages of Short Sea Shipping

2. Short sea shipping trends, statistics. Market insights

- A. In Europe
- B. By Region

3. Developments on SSS from the viewpoint of a port

- A. SSS Challenges.
- B. Role of the Port Authorities

DEVELOPMENT OF SSS

SSS Challenges. Addressing the client needs:

Efficiency = More and better for less money.

- More flexibility
- Better infrastructure
- Lower direct and indirect costs

Infrastructure, quality and organization



DEVELOPMENT OF SSS

SSS Challenges. Addressing the client needs:

Infrastructure, quality and organization



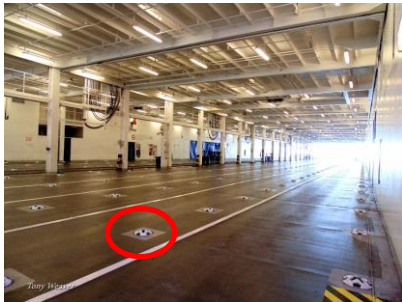
Valenciaport has a hinterland **which covers 51% of Spanish GDP and half of Spain's working population**, in a radius of just 350km. Its proximity to the Spanish capital, **combined with its excellent road and rail connections**

As a hub for the Western Mediterranean, Valenciaport efficiently **distributes goods over a radius of 2000km**, both in southern EU countries and in North Africa (Morocco, Algeria, Tunisia and Libya), representing **a huge market of 270 million consumers**.

DEVELOPMENT OF SSS

SSS Challenges. Addressing the client needs:

Infrastructure, **quality** and organization



Adaptation of vessels to:

- Reduce **environmental impact** and improve efficiency
- Accelerate **loading/unloading times**
- Reduce **damage**

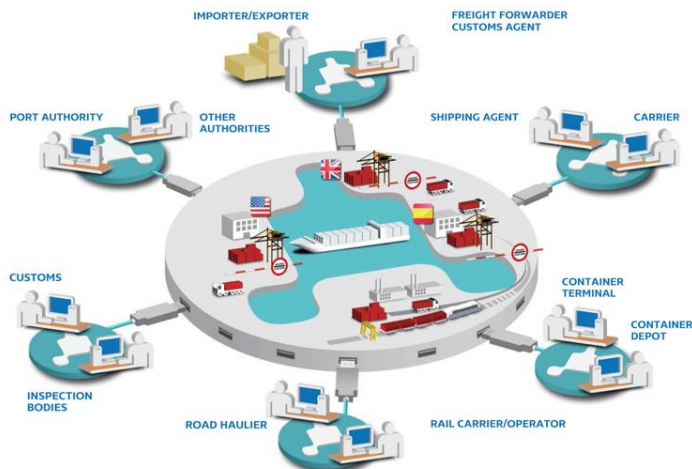


DEVELOPMENT OF SSS

SSS Challenges. Addressing the client needs:

Infrastructure, quality and **organization**

Simplicity in the management of reservations and port access procedures.



DEVELOPMENT OF SSS

Role of Port Authorities in the promoción of SSS services:

- Facilitating **preferential berthing** and **unloading on arrival**
- Enable **fast and safe movements** on the quayside
- Promote good **inland connections**
- **Reduction of port taxes** (number of calls and environmental impact)
- Coordinate relations with **other administrations/ports**
- Control the **quality of the service**
- **Facilitate business**



TRAINING

Arab Academy for Science, Technology & Maritime Transport

Transport & Handling of **Dangerous Cargoes** in Port Areas
The Safe Stowing & Handling
The Preparedness for the Crisis Management In Ports.

Agenda

Online Joint Course

2020

PORT TRAINING INSTITUTE - VALENCIA PORT FOUNDATION

FUNDACIÓN VALENCIAPORT

Port Training Institute

Arab Academy for Science, Technology & Maritime Transport

Digital Transformation
and development of smart ports

Online

Joint Diploma
in cooperation with
Valenciaport Foundation

2021
April

3-4-5 April provided by Port Training Institute
6-7-8 April provided by Valenciaport Foundation

Port Training Institute

VALENCIAPORT

Arab Academy for Science, Technology & Maritime Transport

Crisis Management in Ports
PORT TRAINING INSTITUTE - VALENCIA PORT FOUNDATION IS

Agenda

Online Joint Course

11th to 13th of July (Alexandria - Egypt)
14th to 16th of July (Valencia - Spain)

2020

PORT TRAINING INSTITUTE - VALENCIA PORT FOUNDATION

FUNDACIÓN VALENCIAPORT

Port Training Institute

YEP MED – YOUTH EMPLOYMENT IN PORTS OF THE MEDITERRANEAN

Youth Employment in Ports of the Mediterranean
We empower the youth with BLUE SKILLS

September 2020

30 months

2.9 ME

90% EU contribution

ENI ERCEMED

YEP MED

YOUTH EMPLOYMENT IN PORTS OF THE MEDITERRANEAN

September 2020

30 months

2.9 ME

90% EU contribution

4050 Contacted Persons

Adapted dual TVET curricula

Training for NEETs and Women

420 enterprises

Port of Barcelona

Port of Valencia

Port of Genoa

Port of Marseille

Port of Alexandria

Port of Suez

Port of Port Said

Port of Damietta

Port of Thessaloniki

Port of Piraeus

Port of Athens

Port of Izmir

Port of Antalya

Port of Trabzon

Port of Istanbul

Port of Izmir

Port of Antalya

Port of Trabzon

Port of Istanbul

MEDPORTS ASSOCIATION
Employment, Training and Maritime Expertise Committee

TRAINING CALENDAR

FEBRUARY - MARCH 2020

The best Mediterranean training courses to all maritime and ports employees

L'institut

FUNDACIÓN VALENCIAPORT

Arab Academy for Science, Technology & Maritime Transport



MARKET RESEARCH ON SSS



The LinePort, a tool to analyse SSS in Spain, developed by the Fundación Valenciaport.

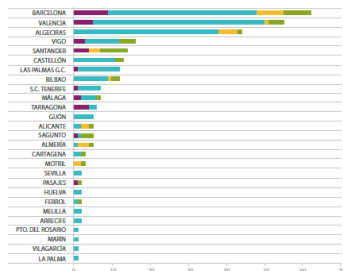


Figure 4: Ranking of Spanish ports according to the number of SSS services by type of freight

LDC-CARRO CONTAINER RO-PA RO-RO

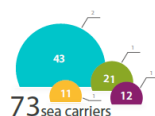
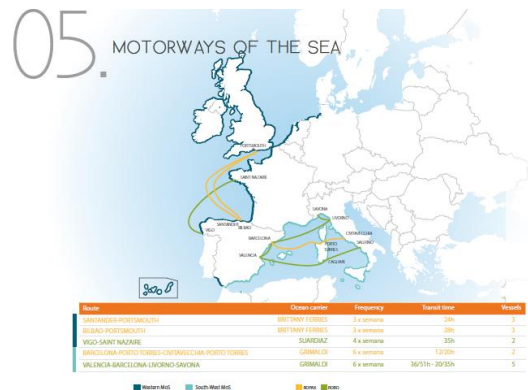


Figure 5: New carriers offering SSS services by type of freight
Breakdown of sea carriers by service



Figure 6: Ranking of Spanish ports according to the number of connected ports of destination

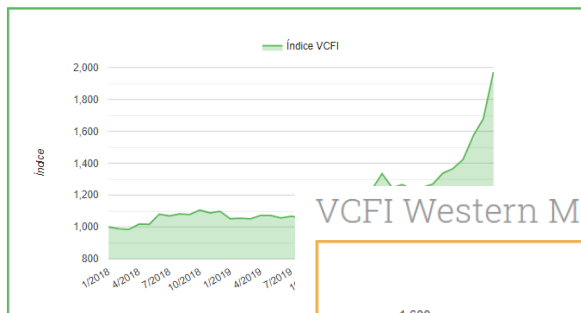
CONTAINER RO-PA



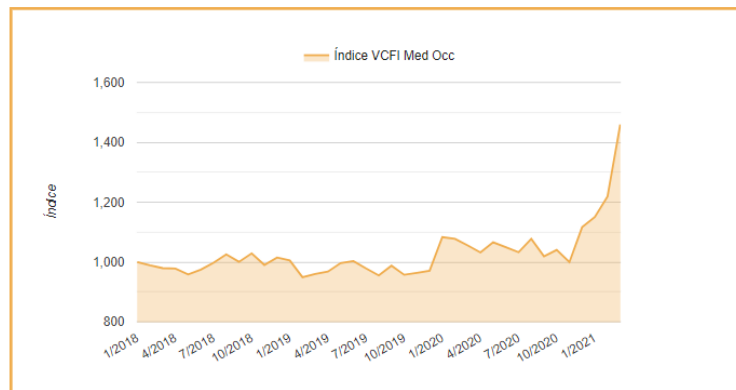
MARKET RESEARCH ON SSS



GLOBAL ECONOMIC ENVIRONMENT MONITOR



VCFI Western Mediterranean





FUNDACIÓN
VALENCIAPORT

www.fundacion.valenciaport.com

