



Fonasba Annual Meeting 2011
Chartering & Documentary Committee
Plenary Meeting

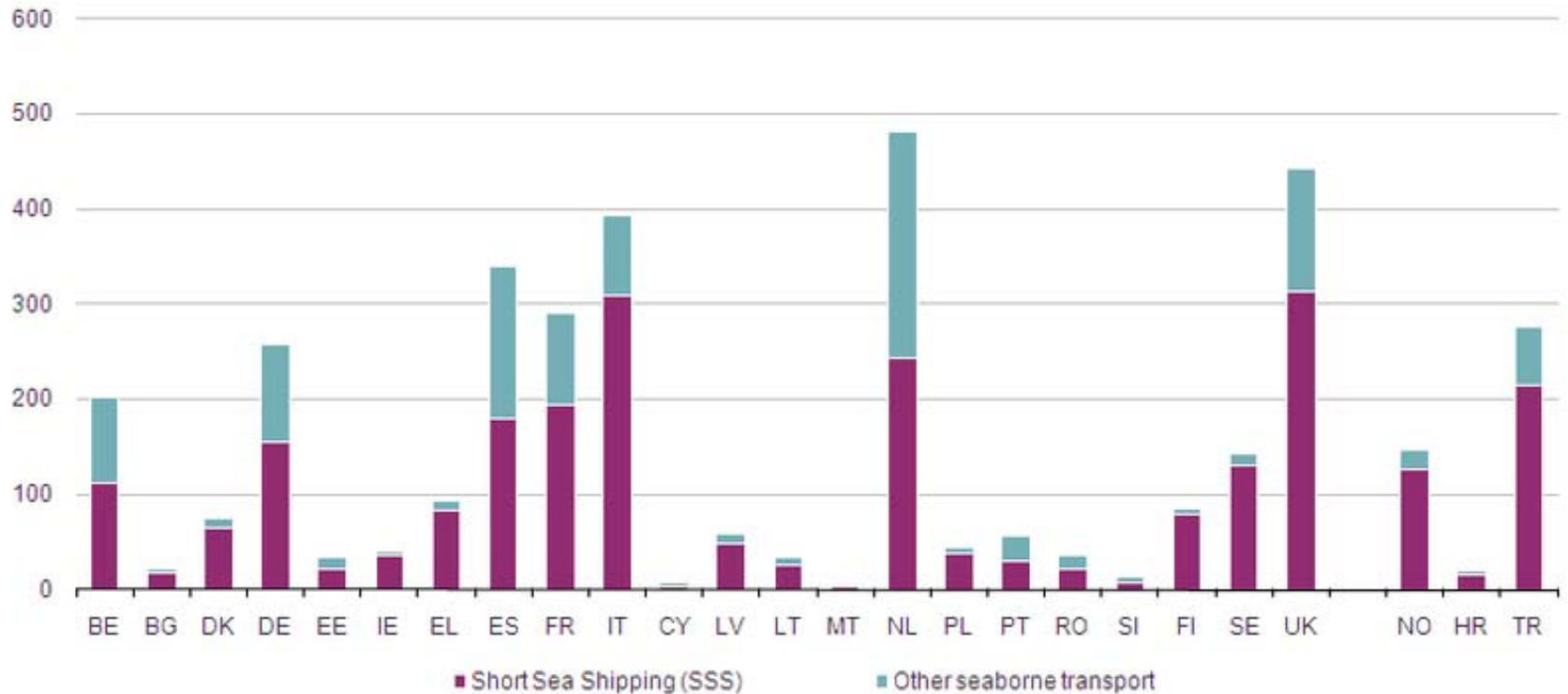
Short sea shipping

Fulvio Carlini
Federagenti – Italy

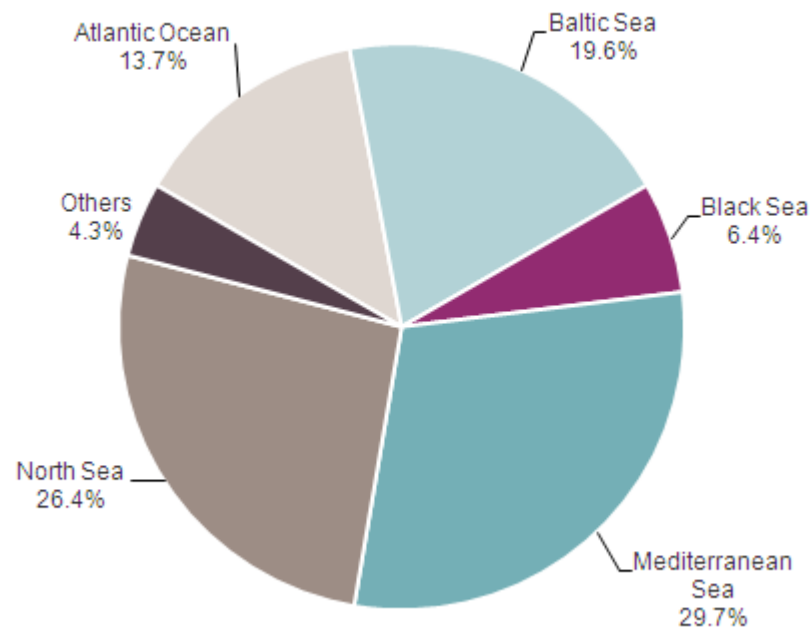


Federazione Nazionale
Agenti Raccomandati Marittimi
e Mediatori Marittimi

File:Share of Short Sea Shipping (SSS) of goods in total sea transport in 2009 (gross weight of goods in Mio tonnes).



File:EU-27 SSS of goods by sea region of partner ports in 2009 (% based on gross weight of goods).



In the 1st quarter 2010, liquid bulk goods almost reached their pre-crisis level. Ports in Poland, Estonia and Malta also seem to have fully recovered.

Table 2: Gross weight of seaborne goods handled in EU-27 main ports, broken down by direction, type of cargo, reporting country, various types of partner geographical areas

	2007	2008	2009		2010			
	Q1	Q1	Q1	Q4	Q1			
	Gross weight of goods (in Mio tonnes)				Gross weight of goods (in Mio tonnes)	Growth rate on previous quarter	Growth rate on same quarter of previous year	"Annual" growth rate
Total	932.8	954.4	835.6	838.5	848.7	+1.2%	+1.6%	-9.2%
By direction								
Inwards	587.5	609.7	526.1	520.0	525.1	+1.0%	-0.2%	-11.9%
Outwards	345.3	344.8	309.5	318.5	323.6	+1.6%	+4.6%	-4.5%
By type of cargo								
Liquid bulk goods	366.3	379.7	364.9	347.2	360.8	+3.9%	-1.1%	-5.5%
Dry bulk goods	228.7	234.8	194.4	196.9	196.4	-0.3%	+1.0%	-15.1%
Large containers	162.1	167.9	142.5	156.1	152.6	-2.2%	+7.1%	-6.1%
Ro-Ro mobile units	113.5	110.0	90.4	88.7	91.0	+2.6%	+0.7%	-9.9%
Other general cargo nes	62.2	62.0	43.3	49.6	47.8	-3.5%	+10.5%	-17.6%
Unknown	0.0	0.0	0.0	0.0	0.0	-	-	-
By reporting country								
BELGIUM (BE)	56.8	59.0	47.6	52.4	52.9	+1.0%	+11.1%	-9.9%
BULGARIA (BG)	5.7	5.6	5.0	6.1	4.2	-31.8%	-16.3%	-18.7%
DENMARK (DK)	25.0	24.8	21.3	20.4	19.2	-5.5%	-9.8%	-14.0%
GERMANY (DE)	76.2	77.7	63.0	65.3	66.5	+1.8%	+5.5%	-12.6%
ESTONIA (EE)	13.2	9.1	8.3	9.1	9.8	+8.4%	+19.0%	+12.4%
IRELAND (IE)	12.3	12.1	10.4	10.9	10.1	-7.3%	-3.3%	-10.5%
GREECE (EL)	30.2	29.1	28.0	25.5	23.3	-8.8%	-16.8%	-11.8%
SPAIN (ES)	100.4	104.7	86.0	93.4	87.5	-6.3%	+1.8%	-8.1%
FRANCE (FR)	81.3	85.8	77.8	77.0	77.5	+0.7%	-0.4%	-9.0%
ITALY (IT)	133.2	135.1	126.7	105.5	115.2	+9.2%	-9.1%	-10.9%
CYPRUS (CY)	1.8	1.9	1.7	1.6	1.7	+9.7%	-2.3%	-13.2%
LATVIA (LV)	14.5	15.6	16.0	14.0	14.8	+5.3%	-7.8%	-4.9%
LITHUANIA (LT)	6.7	9.2	8.1	9.2	8.7	-5.7%	+6.5%	-1.3%
MALTA (MT)	0.8	0.7	0.8	0.8	0.9	+17.2%	+16.1%	+1.9%
NETHERLANDS (NL)	120.9	133.7	117.3	119.2	134.0	+12.4%	+14.3%	-6.4%
POLAND (PL)	12.5	11.3	10.1	12.3	13.3	+8.3%	+32.3%	+1.4%
PORTUGAL (PT)	15.7	17.2	13.7	15.2	14.2	-6.5%	+3.9%	-0.6%
ROMANIA (RO)	11.6	11.0	8.2	8.7	7.8	-9.9%	-4.9%	-26.0%
SLOVENIA (SI)	4.3	4.2	3.6	3.6	3.6	-1.7%	-5.9%	-18.4%
FINLAND (FI)	25.3	27.1	21.4	24.6	21.2	-14.0%	-1.1%	-14.4%
SWEDEN (SE)	42.3	42.6	37.3	39.6	40.3	+1.6%	+7.8%	-9.0%
UNITED KINGDOM (UK)	141.9	136.8	123.1	124.2	122.1	-1.7%	-0.8%	-8.6%
Split Short Sea Shipping								
Short Sea Shipping	642.6	647.0	578.4	572.9	579.5	+1.2%	+0.2%	-7.7%
Deep Sea Shipping	277.7	292.1	244.1	251.5	255.6	+1.6%	+4.7%	-12.6%
Unknown	12.5	15.3	13.1	14.1	13.6	-3.4%	+4.0%	-5.9%
By type of transport								
National	140.5	134.0	126.3	116.6	110.9	-4.9%	-12.2%	-8.9%
International intra-EU-27	322.6	324.3	276.7	281.8	296.1	+5.1%	+7.0%	-7.6%
International extra-EU-27	457.2	480.8	419.5	426.0	428.1	+0.5%	+2.0%	-10.4%
Unknown	12.5	15.3	13.1	14.1	13.6	-3.4%	+4.0%	-5.9%
By partner geographical zone								
EU-27	463.1	458.3	402.9	398.4	407.0	+2.2%	+1.0%	-8.0%
Europe except EU-27	118.8	124.8	116.8	125.4	121.8	-2.8%	+4.3%	-5.2%
America	118.2	130.3	101.2	109.5	110.3	+0.7%	+9.1%	-15.7%
Africa	111.6	120.5	110.3	100.3	99.0	-1.3%	-10.3%	-12.9%
Asia & Australasia	108.7	105.1	91.2	90.9	97.0	+6.7%	+6.3%	-7.6%
Unknown	12.5	15.3	13.1	14.1	13.6	-3.4%	+4.0%	-5.9%

Source: Eurostat – Maritime transport statistics

Table 3: Gross weight of seaborne goods handled in Norwegian and Croatian main ports

	2007	2008	2009		2010			
	Q1	Q1	Q1	Q4	Q1			
NORWAY (NO)	45.0	39.9	37.8	42.4	40.7	-3.9%	+7.7%	-3.5%
CROATIA (HR)	6.0	5.8	5.1	5.1	4.5	-11.0%	-11.7%	-22.5%

Source: Eurostat – Maritime transport statistics

File:SSS of goods by reporting country and type of cargo in 2009 (gross weight of goods in Mio tonnes).

	Liquid Bulk	Dry bulk	Containers	Ro-Ro units	Other cargo	Total
EU-27	837.1	339.2	196.7	203.6	108.3	1 684.9
BELGIUM (BE)	28.2	16.7	40.4	20.0	6.3	111.7
BULGARIA (BG)	9.0	6.3	1.3	0.1	1.5	18.2
DENMARK (DK)	23.0	15.6	4.3	19.2	3.0	65.2
GERMANY (DE)	49.5	30.5	36.5	28.4	11.1	156.0
ESTONIA (EE)	12.5	3.7	1.2	0.0	5.2	22.6
IRELAND (IE)	10.7	6.1	6.6	10.9	0.6	35.0
GREECE (EL)	40.0	17.9	6.7	14.4	3.9	82.8
SPAIN (ES)	86.5	36.9	31.8	11.4	13.2	179.8
FRANCE (FR)	118.8	31.1	9.3	24.7	11.0	194.9
ITALY (IT)	161.7	55.8	47.1	29.8	14.1	308.5
CYPRUS (CY)	1.4	0.2	0.7	0.0	0.2	2.5
LATVIA (LV)	17.4	24.1	1.8	1.6	3.7	48.7
LITHUANIA (LT)	15.1	4.7	2.3	1.9	1.5	25.4
MALTA (MT)	1.5	0.6	0.6	0.3	0.1	3.0
NETHERLANDS (NL)	151.6	37.3	27.1	12.9	14.9	243.8
POLAND (PL)	10.6	14.6	5.1	4.8	2.6	37.7
PORTUGAL (PT)	14.5	6.1	7.5	0.2	0.9	29.2
ROMANIA (RO)	8.0	10.3	1.7	0.1	2.5	22.6
SLOVENIA (SI)	2.2	2.7	1.9	0.0	1.0	7.8
FINLAND (FI)	26.5	20.2	9.5	13.0	9.8	79.0
SWEDEN (SE)	51.9	19.0	9.0	38.3	12.1	130.4
UNITED KINGDOM (UK)	140.5	56.6	19.4	83.8	13.0	313.3
NORWAY (NO)	69.0	37.2	4.1	6.2	10.0	126.5
CROATIA (HR)	7.9	5.7	1.0	0.6	1.1	16.3
TURKEY (TR)	85.0	65.3	37.1	4.6	22.5	214.5

File:EU-27 Top 20 SSS ports in 2009 (gross weight of goods in Mio tonnes).PNG

Rank 2009	Ports	(1)	Total SSS	Growth 2008-2009	Share of EU-27 SSS	Other seaborne transport
1	Rotterdam (NL)	=	173.3	-2.2%	7.5 %	180.5
2	Antwerpen (BE)	=	74.2	-9.3%	3.2 %	67.9
3	Marseille (FR)	=	58.5	-11.6%	2.5 %	21.3
4	Le Havre (FR)	+1	40.5	-15.2%	1.8 %	28.7
5	Trieste (IT)	+4	39.4	+13.2%	1.7 %	1.6
6	Immingham (UK)	=	39.3	-7.1%	1.7 %	15.4
7	Hamburg (DE)	-3	38.6	-23.9%	1.7 %	56.1
8	London (UK)	-1	36.5	-11.6%	1.6 %	9.0
9	Göteborg (SE)	-1	35.5	-7.3%	1.5 %	3.4
10	Amsterdam (NL)	+4	33.5	+10.0%	1.5 %	39.2
11	Tees & Hartlepool (UK)	-1	30.7	-10.1%	1.3 %	8.4
12	Genova (IT)	+1	30.0	-2.7%	1.3 %	12.7
13	Wilhelmshaven (DE)	-2	28.6	-13.5%	1.2 %	5.6
14	Gioia Tauro (IT)	+6	28.3	+11.4%	1.2 %	6.1
15	Forth (UK)	-3	28.0	-13.8%	1.2 %	8.6
16	Riga (LV)	+1	26.0	+1.1%	1.1 %	3.2
17	Dover (UK)	+7	24.9	+3.1%	1.1 %	0.2
18	Milford Haven (UK)	+3	24.5	-2.9%	1.1 %	14.8
19	Tarragona (ES)	+14	24.1	+18.0%	1.0 %	9.3
20	Dunkerque (FR)	-5	23.2	-11.7%	1.0 %	14.7
Total top 20			837.8	-6.5%	36.4 %	507.0
Total EU-27 ports			2 302.6	-9.8%	100.0%	1 034.5

(1) This column indicates the number of positions gained or lost compared to 2008

File:Liquid bulk - EU-27 Top 5 SSS ports in 2009 (gross weight of goods in Mio tonnes).

Rank 2009	Ports	(1)	Total SSS	Growth 2008-2009	Share of EU-27 SSS	Other seaborne transport
1	Rotterdam (NL)	=	119.9	+0.2%	11.1%	73.4
2	Marseille (FR)	=	49.7	-10.6%	4.6%	10.5
3	Trieste (IT)	+3	33.7	+21.6%	3.1%	1.2
4	Le Havre (FR)	-1	32.2	-13.6%	3.0%	13.4
5	Wilhelmshaven (DE)	+1	26.0	-16.4%	2.4%	4.4
Total top 5			261.5	-3.7%	24.3 %	102.9
Total EU-27 ports			1 077.0	-6.7%	100.0%	334.6

(1) This column indicates the number of positions gained or lost compared to 2008

File:Dry bulk - EU-27 Top 5 SSS ports in 2009 (gross weight of goods in Mio tonnes).

Rank 2009	Ports	(1)	Total SSS	Growth 2008-2009	Share of EU-27 SSS	Other seaborne transport
1	Riga (LV)	=	16.6	-2.0%	3.8%	1.9
2	Rotterdam (NL)	=	14.5	-4.1%	3.3%	49.7
3	Ravenna (IT)	+1	12.3	-4.0%	2.8%	1.9
4	Amsterdam (NL)	-1	12.3	-4.4%	2.8%	18.6
5	London (UK)	=	9.7	-17.9%	2.2%	1.9
Total top 5			65.4	-6.0%	14.8 %	74.1
Total EU-27 ports			440.6	-8.2%	100.0%	328.8

(1) This column indicates the number of positions gained or lost compared to 2008

File:Containers - EU-27 Top 5 SSS ports in 2009 (gross weight of goods in Mio tonnes).

Rank 2009	Ports	(1)	Total SSS	Growth 2008-2009	Share of EU-27 SSS	Other seaborne transport
1	Antwerpen (BE)	=	36.3	-2.5%	12.4%	34.8
2	Gioia Tauro (IT)	+2	28.1	+12.3%	9.6%	6.0
3	Rotterdam (NL)	-1	26.2	-8.8%	9.0%	53.4
4	Hamburg (DE)	-1	17.7	-32.5%	6.0%	37.9
5	Bremerhaven (DE)	=	16.5	-10.3%	5.6%	23.1
Total top 5			124.8	-8.0%	42.7 %	155.3
Total EU-27 ports			292.4	-10.0%	100.0%	311.9

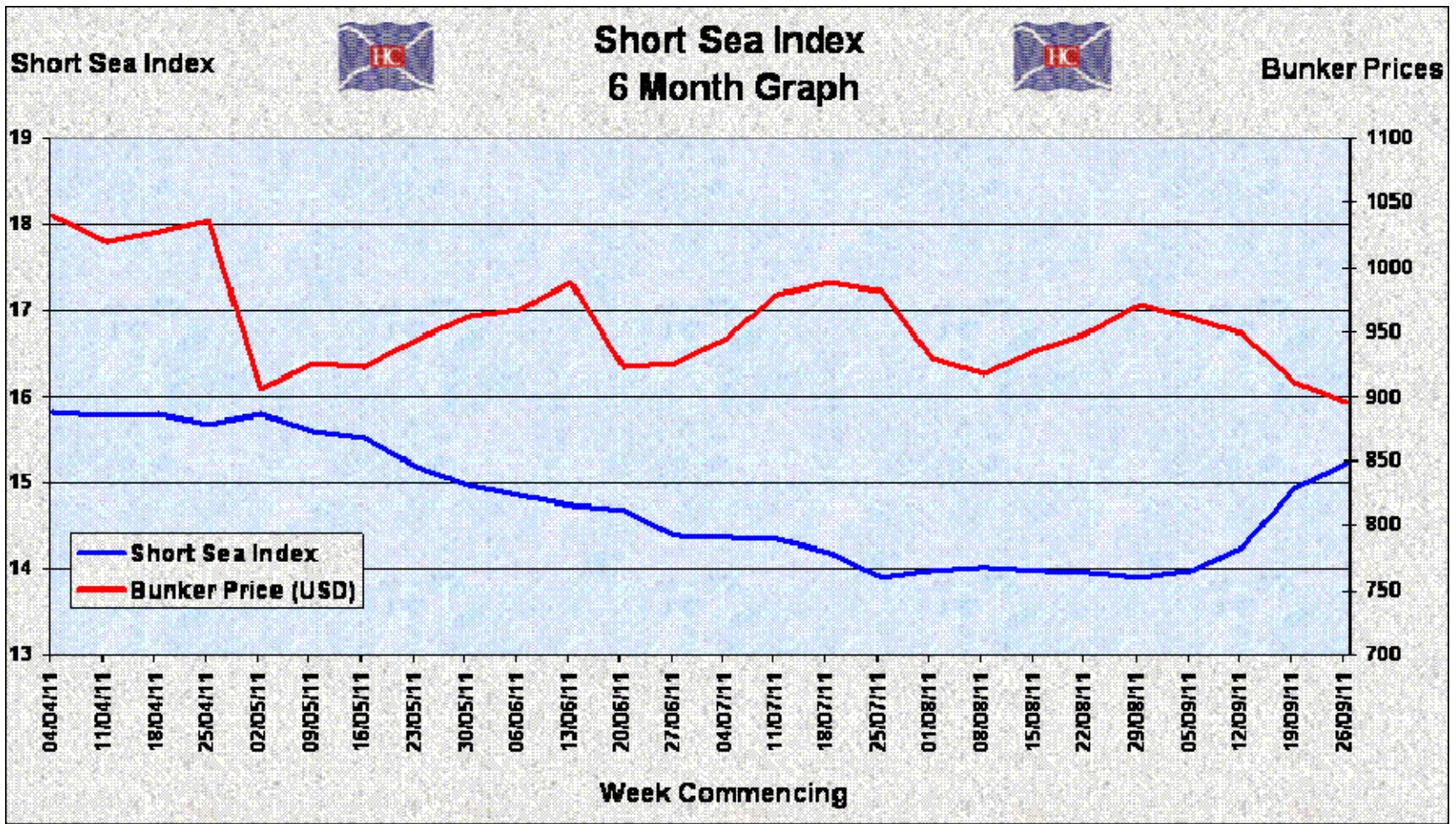
(1) This column indicates the number of positions gained or lost compared to 2008

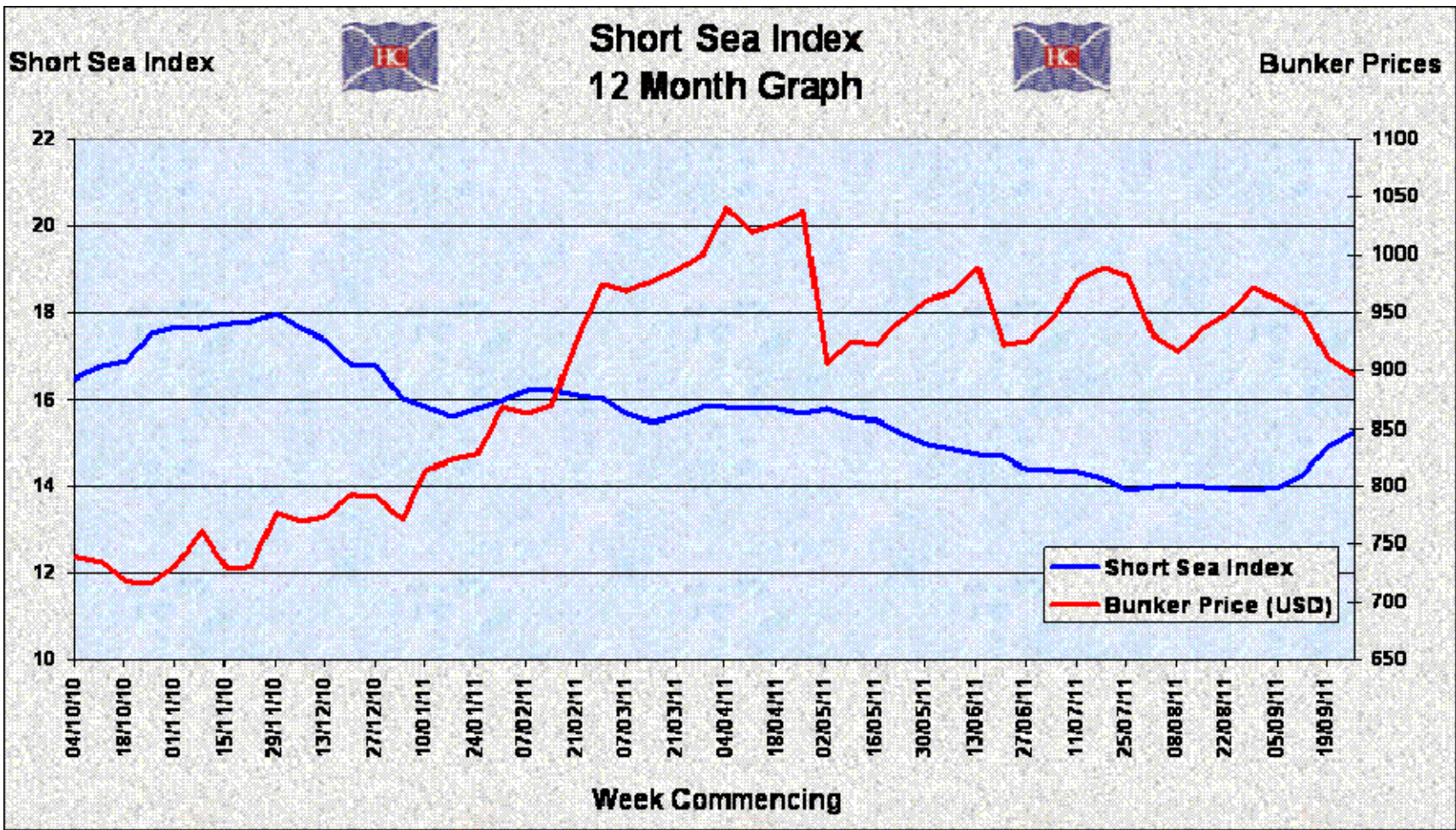
File:SSS of containers by reporting country, 2004-2009 (volume of containers in 1000 TEUs)

	2004		2005	2006	2007	2008		2009		Growth rate 2008-2009 (%)		Average annual growth rate 2004-2009 (%)	
	Total	of which empty	Total	Total	Total	Total	of which empty	Total	of which empty	Total	of which empty	Total	of which empty
EU-27	20 343	4 219	21 898	22 934	25 341	25 759	5 474	21 862	4 535	-15.1%	-17.2%	+1.5%	+1.5%
BELGIUM (BE) ⁽¹⁾	1 940	212	2 283	2 587	3 320	3 969	648	3 860	556	-2.8%	-14.1%	+14.8%	+21.3%
BULGARIA (BG)	102	28	105	111	118	184	52	132	30	-28.3%	-41.6%	+5.2%	+1.7%
DENMARK (DK)	470	101	544	601	696	664	171	571	155	-14.0%	-8.8%	+4.0%	+9.1%
GERMANY (DE)	4 236	845	4 686	5 407	5 800	5 863	1 277	4 218	870	-28.1%	-31.9%	-0.1%	+0.6%
ESTONIA (EE)	160	33	190	227	265	269	74	194	36	-27.9%	-51.2%	+4.0%	+1.9%
IRELAND (IE)	922	192	989	1 097	1 159	1 037	235	806	167	-22.3%	-29.0%	-2.7%	-2.8%
GREECE (EL)	1 292	193	1 152	1 087	1 154	655	167	771	179	+17.6%	+7.3%	-9.8%	-1.6%
SPAIN (ES)	3 183	755	3 874	3 929	4 378	4 344	1 025	3 680	934	-15.3%	-8.9%	+2.9%	+4.3%
FRANCE (FR)	1 269	339	1 272	1 254	1 440	1 485	461	1 241	420	-16.5%	-8.8%	-0.4%	+4.4%
ITALY (IT)	4 392	627	4 361	4 258	4 637	4 533	427	3 992	280	-11.9%	-34.3%	-1.9%	-14.9%
CYPRUS (CY) ⁽¹⁾	233	106	128	127	104	120	38	99	37	-17.7%	-2.8%	-15.7%	-19.1%
LATVIA (LV)	151	39	162	192	233	231	58	181	38	-21.7%	-35.7%	+3.7%	-0.7%
LITHUANIA (LT)	174	55	214	231	321	372	122	248	57	-33.4%	-53.1%	+7.4%	+0.7%
MALTA (MT)	88	26	65	60	59	70	20	74	22	+5.3%	+13.9%	-3.5%	-2.9%
NETHERLANDS (NL)	3 026	640	3 527	3 796	4 062	3 736	895	3 227	754	-13.6%	-15.7%	+1.3%	+3.3%
POLAND (PL) ⁽¹⁾	213	36	492	576	762	856	221	660	133	-22.8%	-39.9%	+25.4%	+29.8%
PORTUGAL (PT)	685	170	719	796	870	958	232	919	238	-4.0%	+2.6%	+6.1%	+7.0%
ROMANIA (RO) ⁽¹⁾	154	26	212	169	59	408	88	178	34	-56.4%	-61.2%	+2.9%	+5.9%
SLOVENIA (SI)	135	15	180	185	207	225	51	234	52	+3.9%	+2.0%	+11.6%	+27.7%
FINLAND (FI)	1 279	226	1 297	1 391	1 560	1 599	375	1 120	248	-29.9%	-33.7%	-2.6%	+2.0%
SWEDEN (SE)	869	210	962	1 027	1 114	1 129	251	1 056	248	-6.5%	-1.0%	+4.0%	+3.4%
UNITED KINGDOM (UK)	3 408	1 102	3 027	2 950	3 244	3 172	961	2 694	801	-15.1%	-16.7%	-4.6%	-6.2%
NORWAY (NO)	502	141	508	533	567	563	160	531	157	-5.7%	-1.5%	+1.1%	+2.2%
CROATIA (HR)	:	:	46	53	90	138	51	129	50	-6.5%	-3.1%	:	:
TURKEY (TR)	:	:	:	:	:	45	:	46	:	+3.9%	:	:	:

(1) See methodological notes by country in "Data sources and availability".

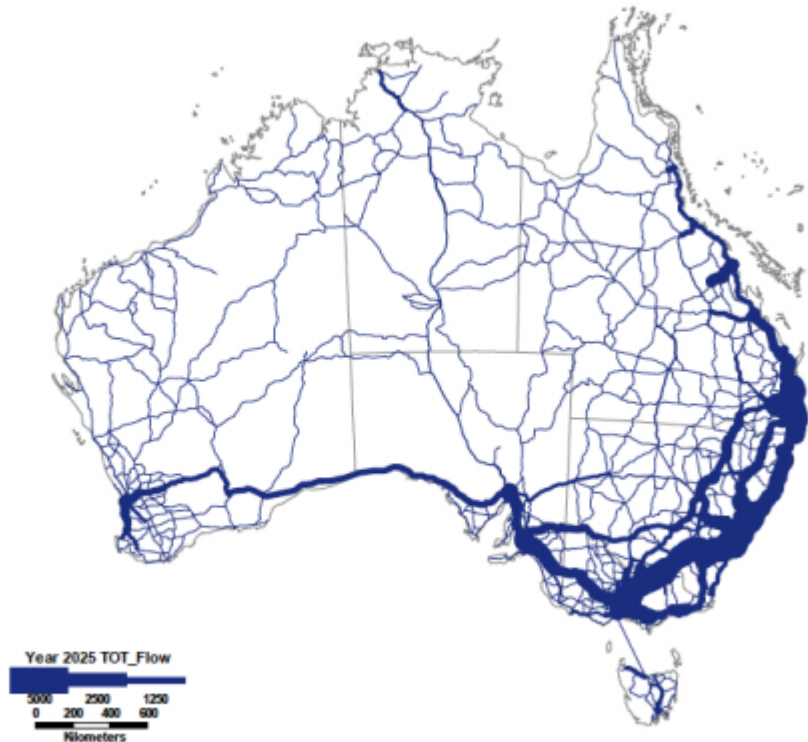






AUSTRALIA

Figure 2: Inter-Regional Truck Highway Usage in 2025



Source: Commonwealth of Australia (2006). Table 3.4.