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« ESN, THE WAY FORWARD »

by Jean-Marie MILLOUR

SPC France: Shortsea Promotion Centre

ESN: European Shortsea Network



ECASBA Seminar – Shortsea Shipping – 03/03/2015





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« ESN, THE WAY FORWARD »

➤ **SHORTSEA: KEY FIGURES**

➤ **SHORTSEA: KEY FACTS**

- REGIONAL MARKETS
- PORTS
- SHIPS





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SHORTSEA: KEY FIGURES





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EU-28 PERFORMANCE BY MODE

TRANSPORT
PERFORMANCE OF FREIGHT TRANSPORT EXPRESSED IN TONNE-KILOMETRES

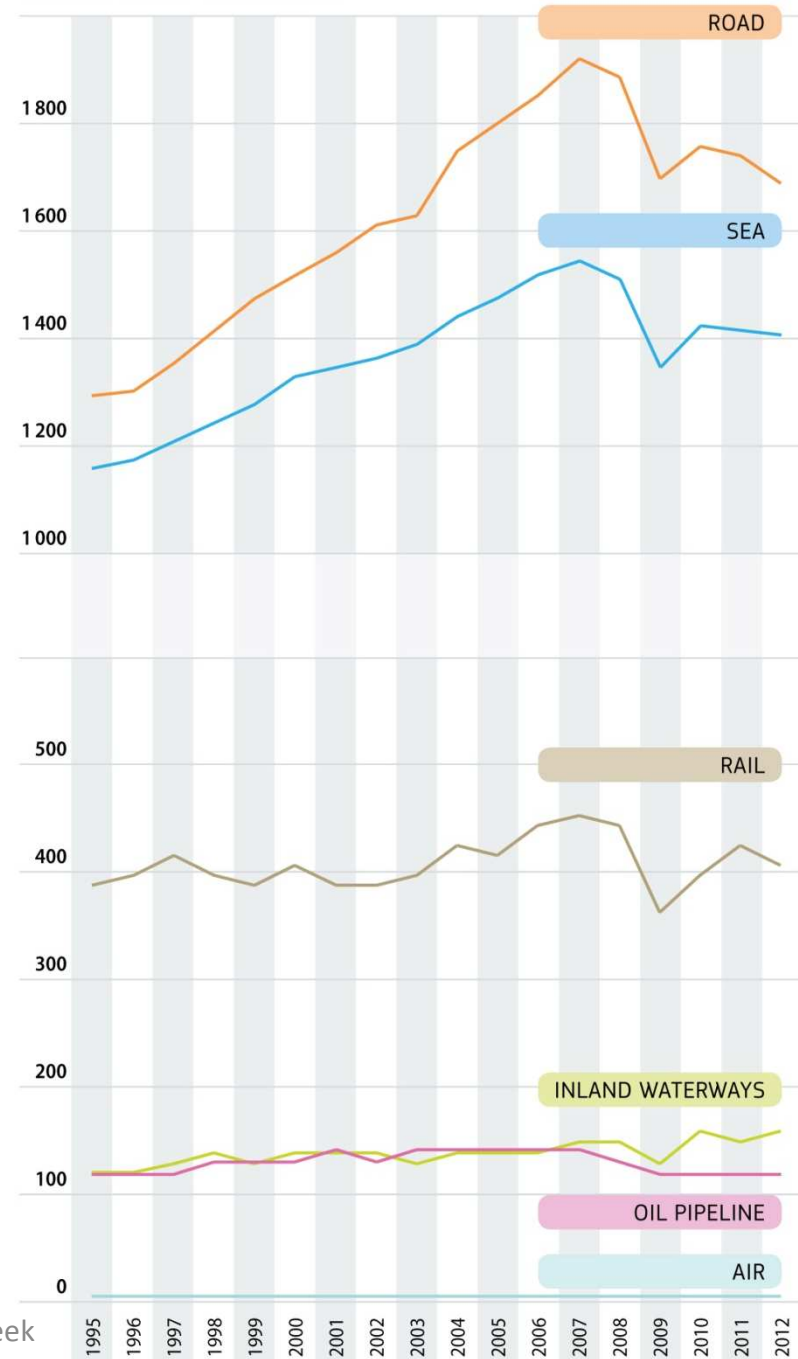
MODAL SPLIT

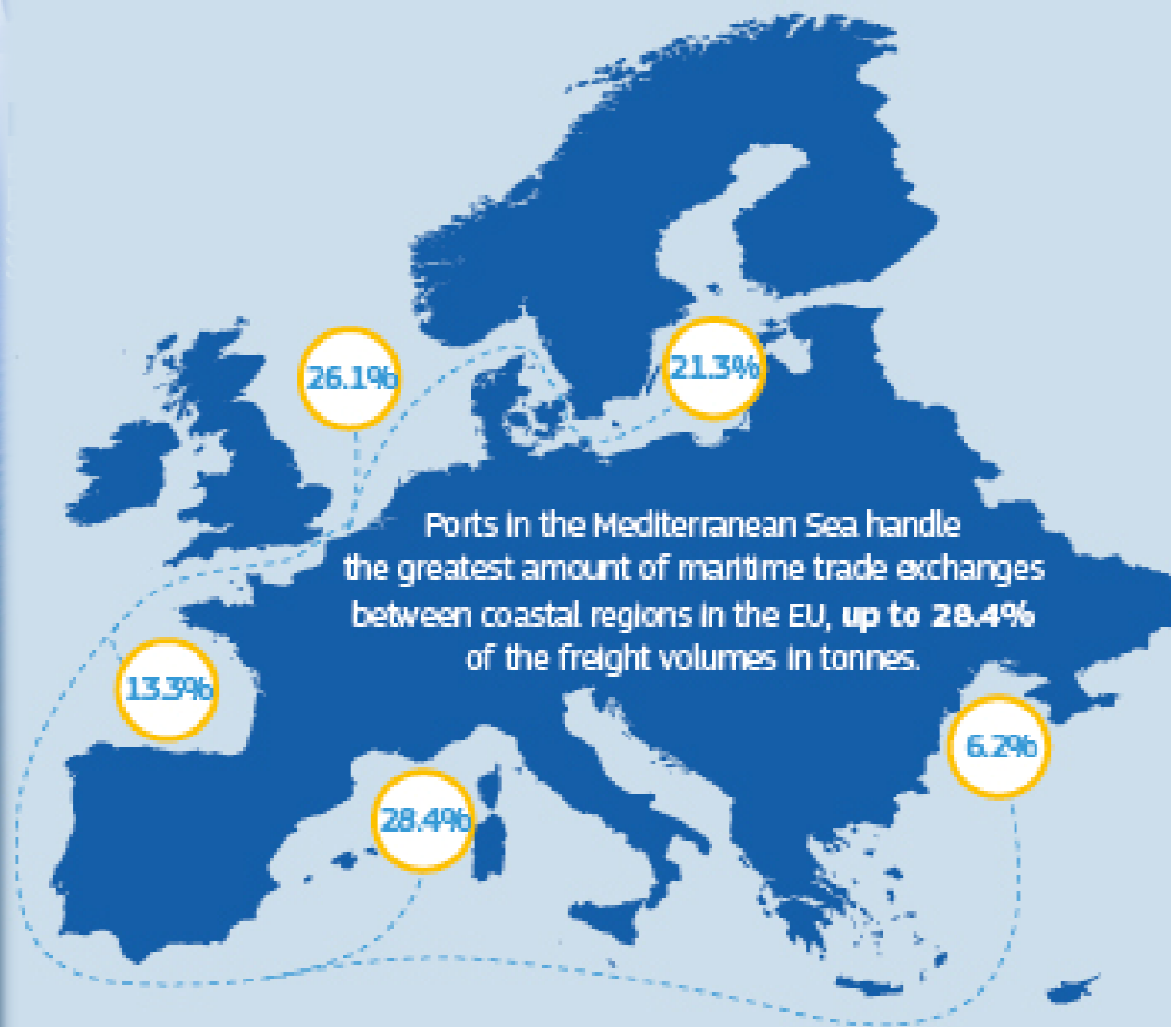
	%					
	ROAD	RAIL	INLAND WATERWAYS	PIPE-LINES	SEA	AIR
1995	42.0	12.6	4.0	3.7	37.6	0.1
1998	42.7	11.9	4.0	3.8	37.5	0.1
1999	43.4	11.4	3.8	3.7	37.7	0.1
2000	43.3	11.5	3.8	3.6	37.7	0.1
2001	43.9	10.9	3.7	3.8	37.7	0.1
2002	44.5	10.6	3.7	3.6	37.6	0.1
2003	44.5	10.7	3.4	3.6	37.8	0.1
2004	45.1	10.8	3.5	3.4	37.0	0.1
2005	45.4	10.5	3.5	3.5	37.1	0.1
2006	45.4	10.7	3.4	3.3	37.1	0.1
2007	45.8	10.8	3.5	3.1	36.7	0.1
2008	45.9	10.8	3.5	3.1	36.6	0.1
2009	46.4	9.9	3.6	3.3	36.7	0.1
2010	45.7	10.2	4.0	3.2	36.9	0.1
2011	45.4	11.0	3.7	3.1	36.8	0.1
2012	44.9	10.8	4.0	3.0	37.2	0.1

Notes: Air and Sea: only domestic and intra-EU-28 transport; provisional estimates.
Road: national and international haulage by vehicles registered in the EU-28.

Source : European Commission

billion tonne-kilometres





37%
of the total
intra-EU exchange
of goods
(in tonne-km)
goes through
the EU's ports

Source: Eurostat

(tonne-km = moving 1 000 kg of cargo a distance of 1 km)

Shortsee Network

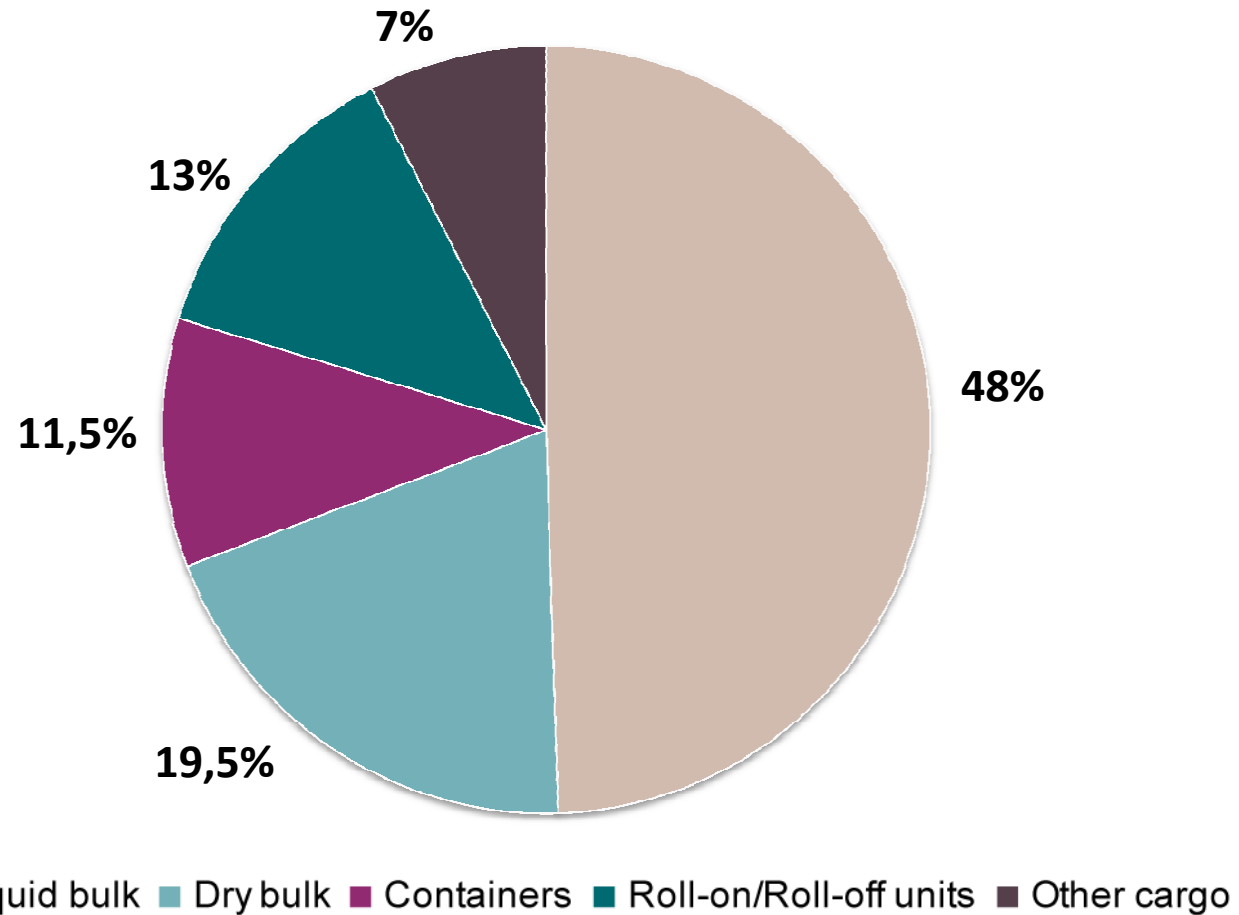




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EU-27 SSS of goods by type of cargo (% based on gross weight of goods in Mio tonnes)



Source: Eurostat

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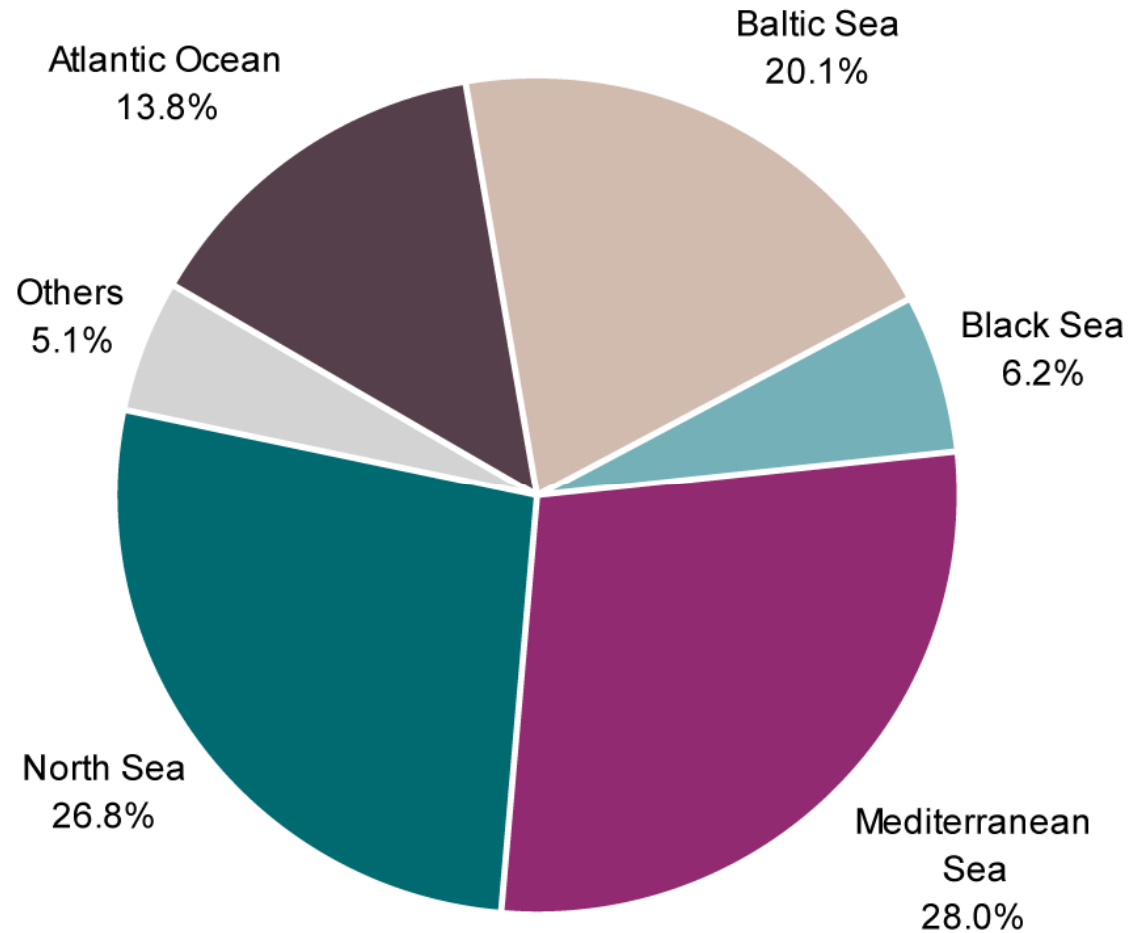




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EU-27 SSS of goods by sea region (% based on gross weight of goods)



Source: Eurostat

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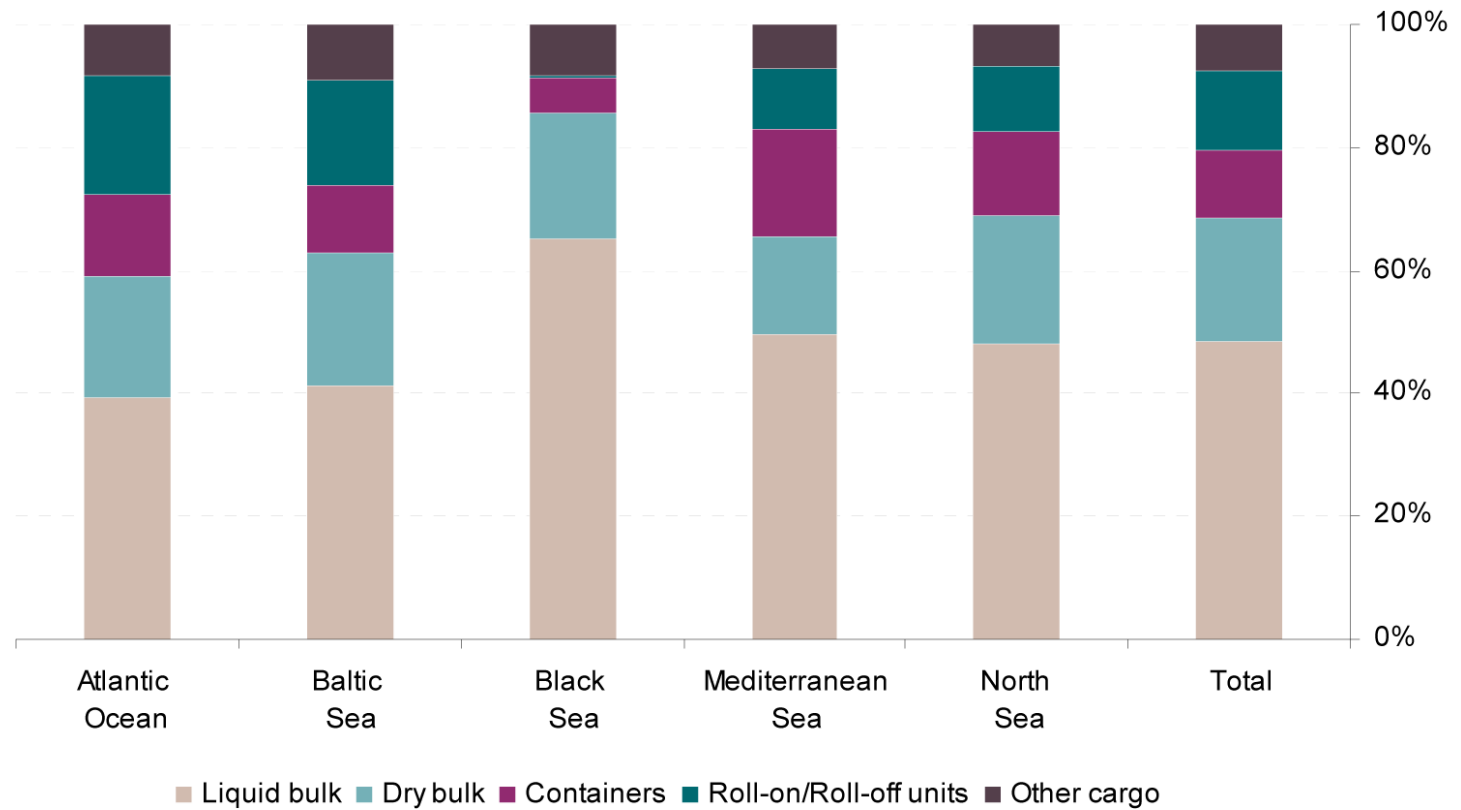




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EU-27 SSS of goods by type of cargo for each sea region (% based on gross weight of goods)



Source: Eurostat

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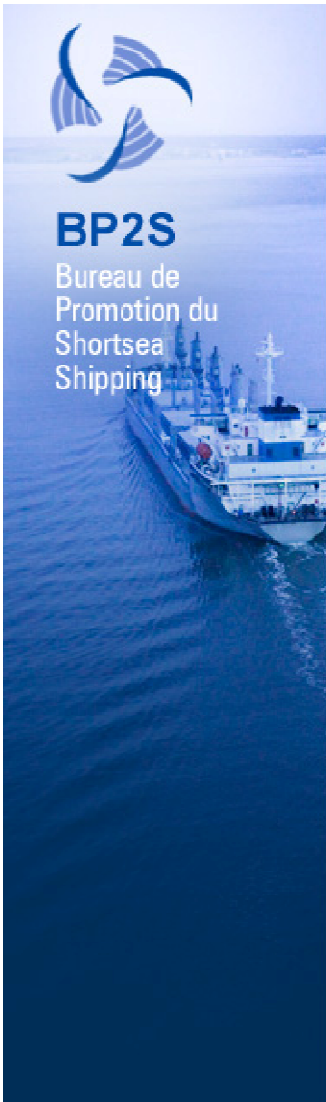
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SHORTSEA: KEY FACTS

Markets, ports and fleets





MEDITERRANEAN MARKET

- Main part / most important share of European Shortsea shipping
- **Shortsea services launched and upgraded**
 - East-West: Grimaldi Group: new traffics between Italy and Iberian Peninsula: espec. Livorno-Savona-Valencia ro/ro line
 - North-South: DFDS in Mediterranean: France-Maghreb, and expected extension to Turkey, Iberian Peninsula, ...





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ATLANTIC MARKET

- **Several Shortsea regular services launched and upgraded:**
 - BG Freight Line : weekly (container line) service Algeciras - Lisbon - Leixos - Vigo – Bilbao
 - P&O Ferries & Transfennica cooperation: over 40 sailings/week between Spain and UK, with a call at Zeebrugge
- **Iberian Peninsula: a dynamic market with** Brittany Ferries, LD Lines, P&O, Transfennica, OPDR, Alveis Shipping, Mac Andrews,...





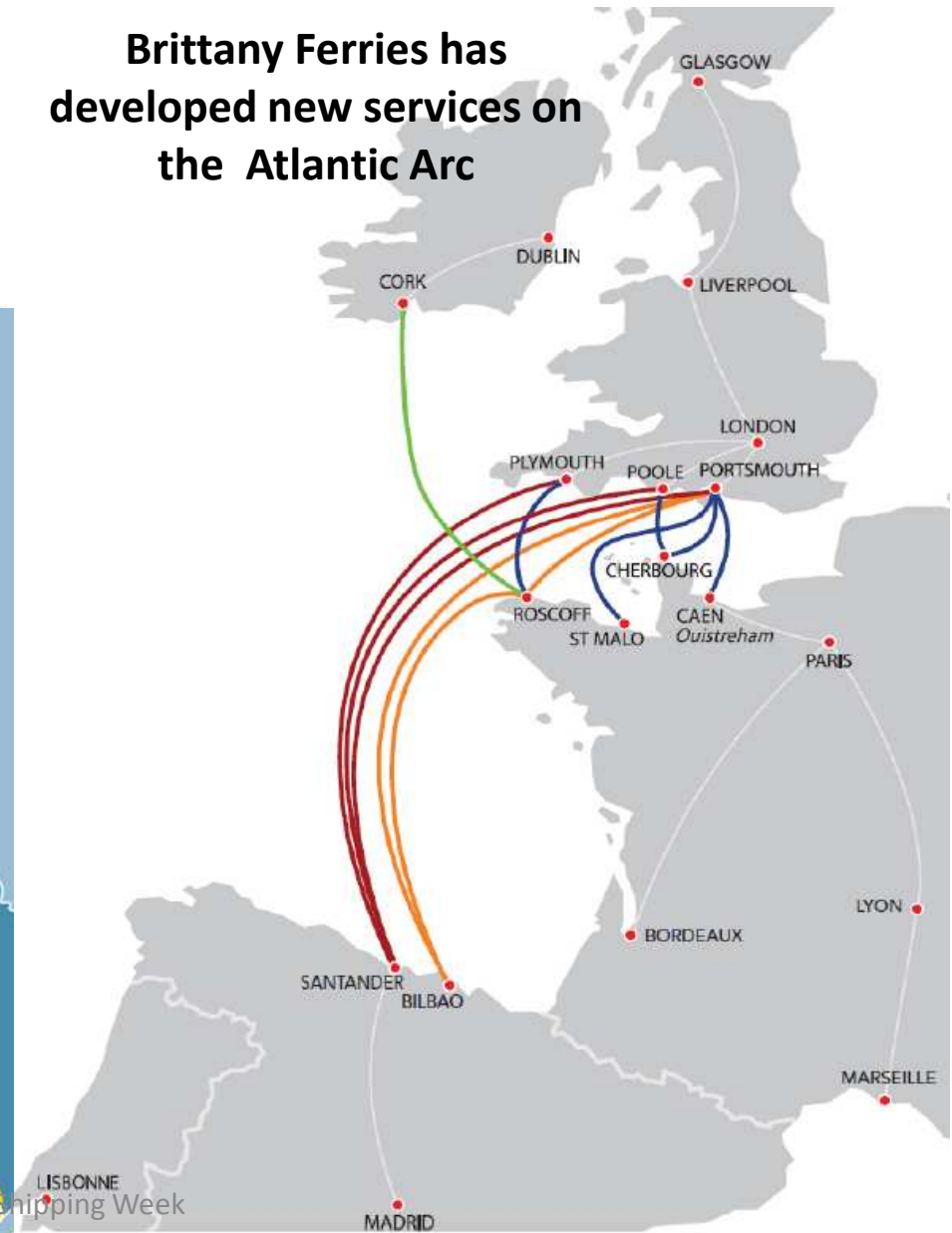
ATLANTIC MARKET

Examples

**LD Lines : New service
between Nantes and Rosslare**



**Brittany Ferries has
developed new services on
the Atlantic Arc**





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NORTH EUROPE MARKET

- **Very dynamic region: many Shortsea services launched and upgraded**

A few examples:

- Finnlines: New ro-ro line Rostock, Zeebrugge and Bilbao
- CMA CGM: New service St Petersburg, Dunkirk and Agadir, (now completed with a new weekly service linking Morocco, Portsmouth, Rotterdam and Le Havre)
- DFDS: new service Moss-Zeebrugge-Immingham-Moss
- Transfennica improved capacity on Baltic services

➤ **To be noticed:**

- Russia : quite a dynamic market for northern shortsea shipping
- UK/Ireland : after a difficult period, traffics start again





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NORTH EUROPE MARKET

- In connection with **new sulphur emission regulation** in SECA (since January 1st, 2015), shipowners have **reshaped their services**

*Ex: DFDS has **closed route** between Esbjerg and the UK in **September 2014** because of an **increase in operational costs***



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ALL REGIONAL MARKETS

- Strong development of lines with 45'PW containers: shortsea & intermodal door to door services
- More and more ships fitted for 45'PW units
- Container & ro-ro ships



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SHIPS

- Ships increasingly larger:
 - Container ships
 - Cascading effect : from deepsea to shortsea
 - Ro-ro ships :
 - *Viking Grace* (1275 ml for ro-ro cargo +1000 ml for cars)
 - *U.N. Istanbul* (4094 ml/280 trailer capacity)



© Hannes Van Rijn
MarineTraffic.com

Maersk Magleby



Viking Grace © Viking Line



U.N. Istanbul © Le marin





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SHIPS

➤ Emission regulations

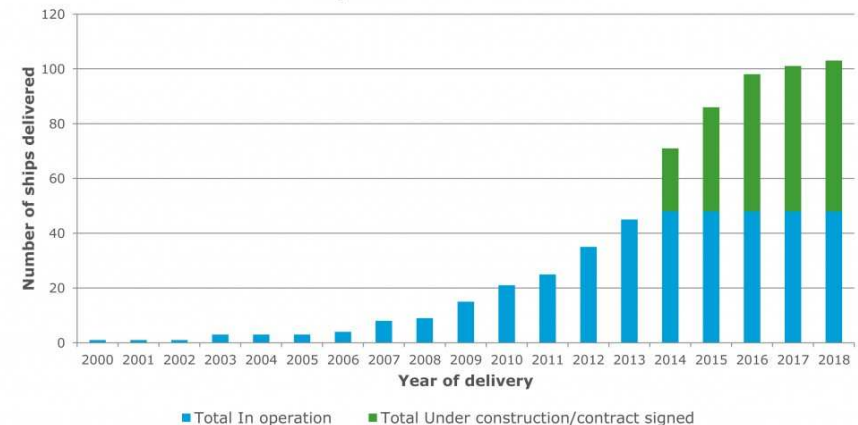
- SOx, NOx, CO2, particles
- Ships to be compliant with all new regulations
- Fleet renewal : retrofiting and newbuilding

LNG fuelled fleet (03/2014) by DNV-GL:

- **103 currently confirmed LNG fuelled ship projects**
 - 48 LNG fuelled ships in operation worldwide
 - 55 confirmed LNG fuelled newbuilds (*ex: Pegasis*)

An exponential development of the LNG fuelled fleet over the last years makes 103 LNG fuelled ship projects confirmed

Development of LNG fuelled fleet



Updated 07.03.2014
Excluding LNG carriers and inland waterway vessels

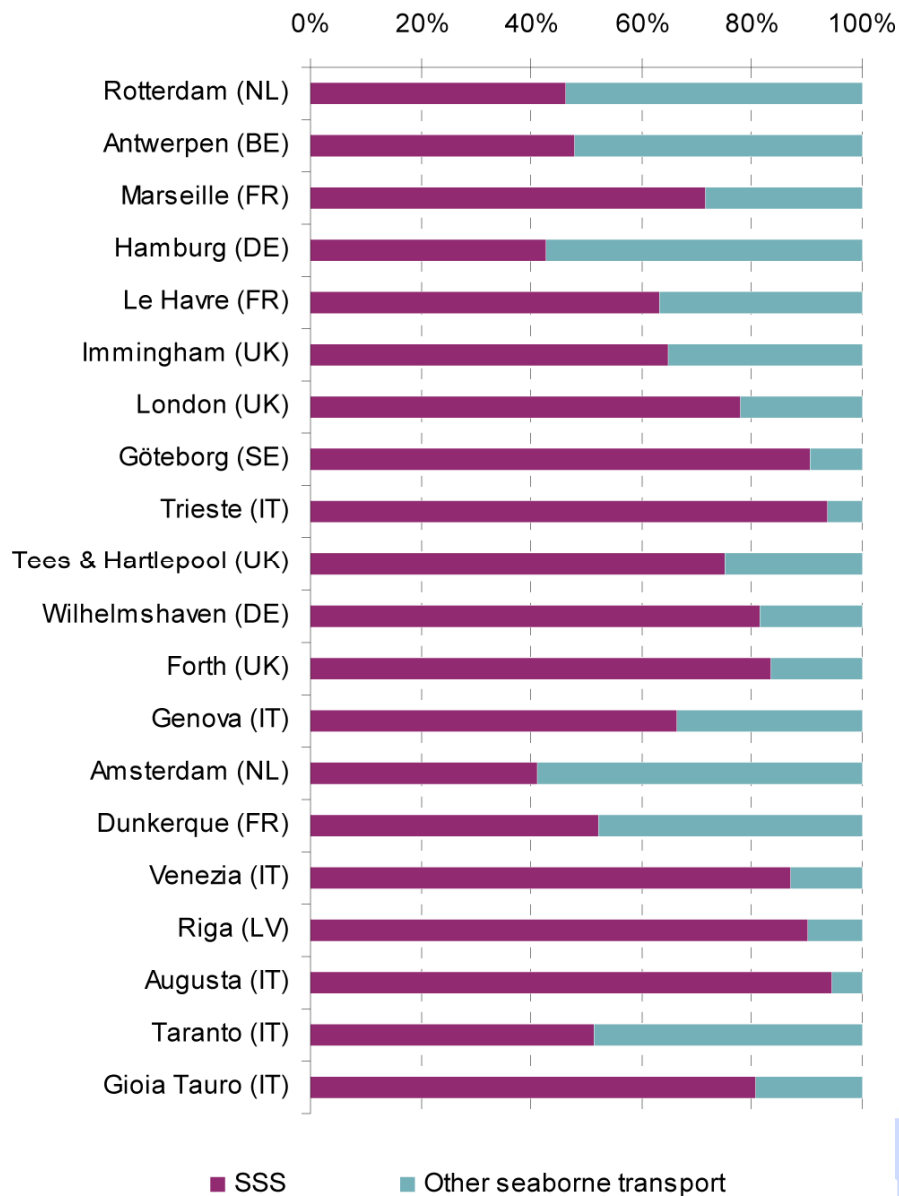


Pegasis © Brittany Ferries

March 2015

European Shipping Week

Share of SSS in total maritime transport for EU-27 top 20 SSS ports



Source: Eurostat

PORTS



RECOMMENDATIONS FOR PROMOTION

28 recommendations (in ESN Recommendations report) such as:

- Establishment of the **ESN as a legal entity** for a better representation (of the ESN) at European level
- **Shortsea Shipping Promotion:**
 - ❖ Campaign to raise public and logistic professionals awareness
 - ❖ Annual European Short Sea Conference (Shortsea'15 – Copenhagen - June 2015)
 - ❖ ESN Education, Training and Awareness activities : 2E3S (Escola Europea de Short Sea Shipping), CASE (Centre Atlantique de Shortsea Européen), conferences, etc.
 - ❖ Good practices highlighted: in various supports of communication, event as “La Nuit du Shortsea” & its Award ceremony, ...





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RECOMMENDATIONS FOR ACTION

- Environment: **LNG as a fuel for shortsea vessels**
 - ❖ Working groups and workshops with stakeholders
 - ❖ Coordination with national transport Ministers task force & dissemination
- **Intermodality**: Promotion, dissemination, standardisation
 - ❖ **Eurocontainer 45'PW** : promotion at the European level and standardisation task with the CEN
 - ❖ Promotion of TEN-T network under the new guidelines using the CEF
- To establish the **European maritime transport space without barriers**, strong support to European institutions & initiatives:
 - **Blue Belt** including E-manifest,
 - Single Document of Transport,
 - Reporting Formalities Directive,
 - Simplification of administrative burden,
 - **Athens Declaration** (May 2014)
 - Etc.





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Thank you for your attention

All reports and more information on:

www.shortsea.fr

www.shortsea.info



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