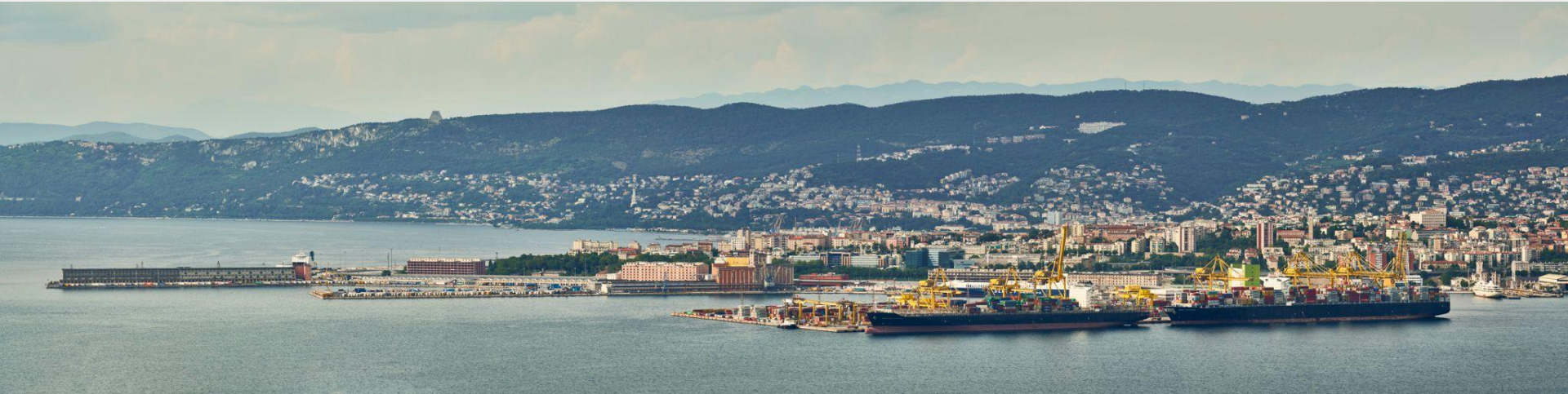


**PORT OF
TRIESTE**

The port beyond the port



Zeno D'Agostino

President

Ports of Trieste and Monfalcone

**PORT OF
TRIESTE**

The ports of Trieste and Monfalcone

An integrated port system

1
region

3
ports

4
inland terminals

 Inland terminals

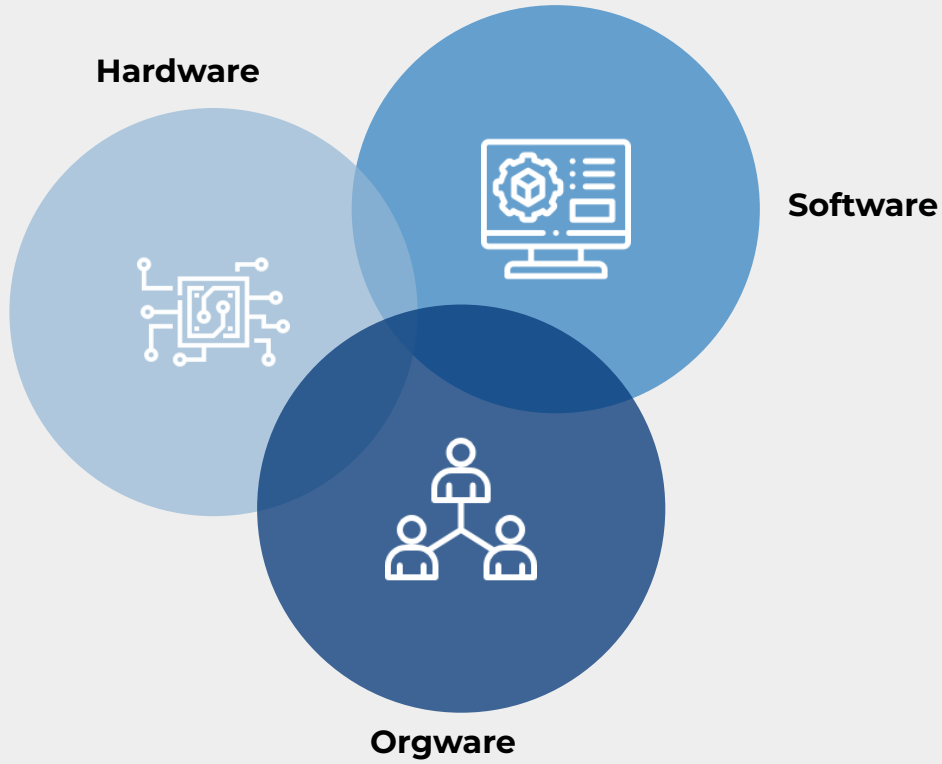
 Ports



PORT OF TRIESTE

PORT OF TRIESTE

Focusing on the orgware



One-stop-shop to make business

industrial development agency

Consorzio di Sviluppo Economico Locale dell'Area Giuliana (52%)

railway shunting company

Adriafer S.r.l. (100%)

inland terminals

Interporto di Trieste S.p.A. (11,85%)

Interporto Cervignano del Friuli S.p.A. (83,67%)

in-house service provider

Porto di Trieste Servizi S.r.l. (100%)

dock labour pool

Agenzia per il Lavoro Portuale del Porto di Trieste S.r.l. (35%)

multimodal transport operators

Alpe Adria S.p.A. (33,33%)

Adria Intermodale S.r.l. (100%)

cruise traffic management

Trieste Terminal Passeggeri S.p.A. (40%)

consortium for the enhancement of the Old Port

Consortium "URSUS" (23,33%)

Trieste at the top of national and European rankings



Source: Eurostat on 2021 data.

From Belgium to Lithuania: via rail to the heart of Europe

Weekly train services scheduled

Austria

Lambach, Salzburg, Villach, Wels / Lambach, Wolfurt
via Villach: Linz, Salzburg, Wien, Wolfurt

Belgium

Zeebrugge

Czech Republic

Mošnov

Germany

Burghausen, Giengen, Karlsruhe, Köln, Ludwigshafen, München, Nürnberg
via München: Berlin, Duisburg, Leipzig, Ludwigshafen, Hamburg, Kiel, Köln
via Duisburg: Kaunas

Hungary

Budapest

Italy

Cervignano, Jesi, Manoppello, Milano, Padova, Pordenone
via Cervignano: Duisburg

Lithuania

Kaunas

Luxemburg

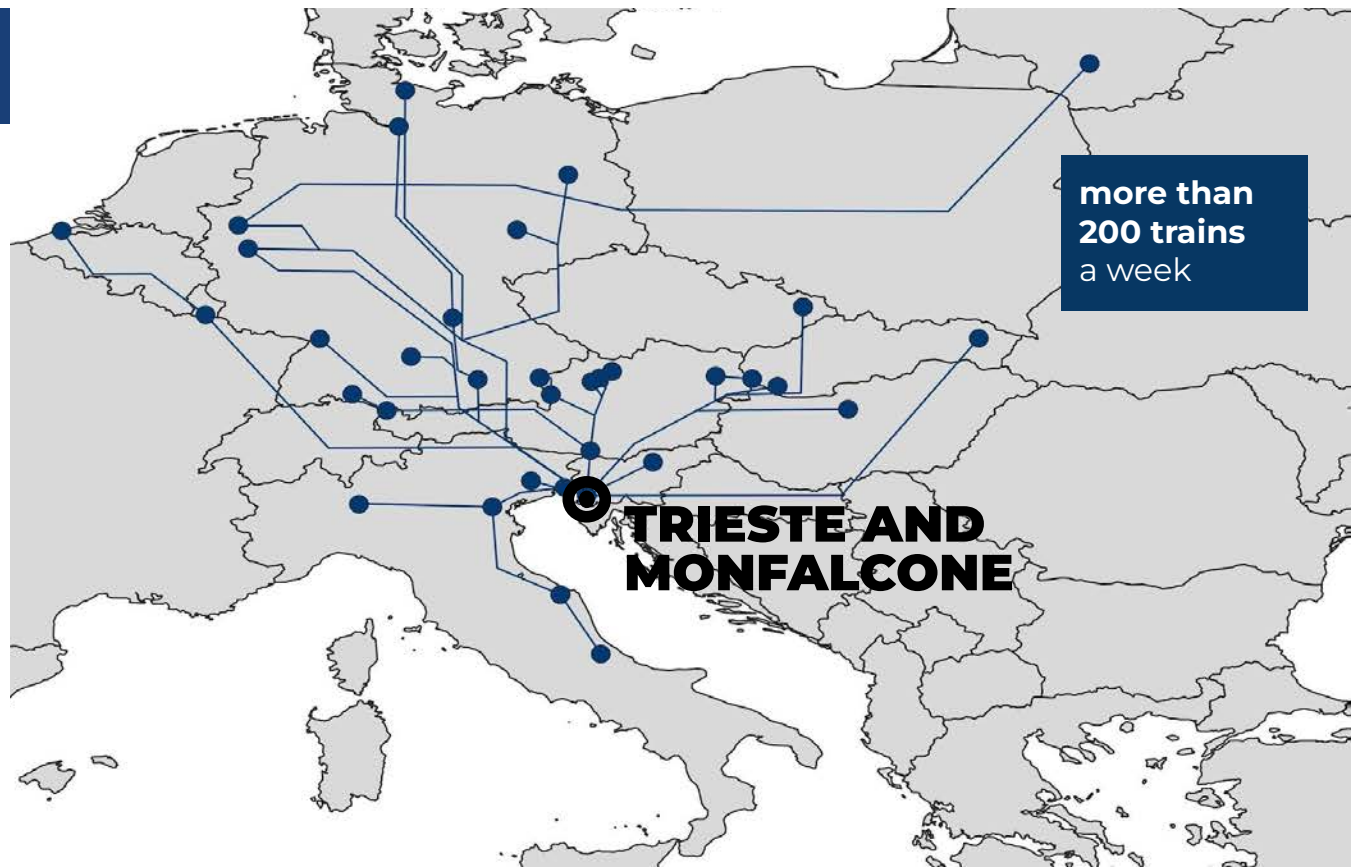
Bettembourg

Slovakia

Bratislava, Dobrá, Dunajská Streda

Slovenia

Velenje

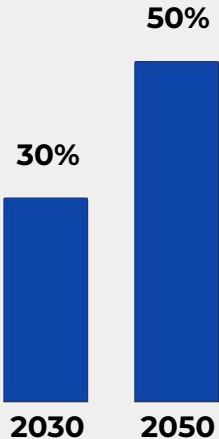


more than
200 trains
a week

PORT OF
TRIESTE

Decades ahead of the EU modal shift target

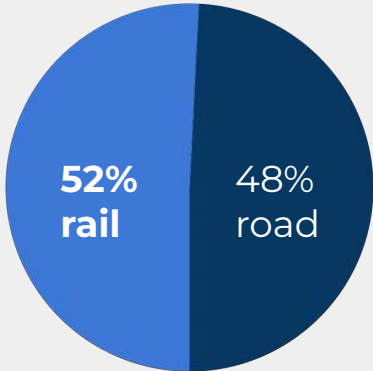
EU target



Modal shift of rail freight to achieve by 2030 and by 2050

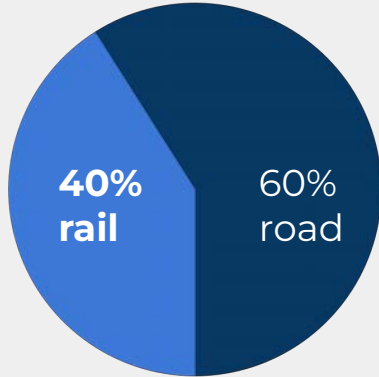
Port of Trieste (2022)

Container sector (TEUs)



EU target for 2050 achieved

Intermodal transport units
















EU target for 2030 achieved

Figures 2022

Port of Trieste

January / December	2021	2022	change %
Total tonnage	55.4 M	57.6 M	+4.0%
Liquid bulk	37.4 M	37.9 M	+1.2%
Dry bulk	571,800	649,700	+13.6%
General cargo	17.4 M	19.1 M	+9.7%
Number of vehicles of which Ro-Ro units	309,100 305,800	337,100 320,300	+9.1% +4.7%
Number of containers/TEUs of which hinterland traffic of which transshipment traffic	757,200 529,700 227,500	877,800 596,200 281,600	+15.9% +12.5% +23.8%
Total trains	9,300	9,500	+2.5%

International investments in the Trieste port system

Container terminal Pier VII	Switzerland		Multimodal terminal Pier VI	Turkey	
Ro-Ro terminal Pier V - Riva Traiana	Denmark		Oil Terminal	Germany, Austria	 
Ro-Ro multimodal Noghere Terminal	Hungary		Berths 47-48	Turkey	
Timber Terminal - Logistic Platform	Germany		Zaule Channel	Finland, Indonesia	 
Cruise terminal	Switzerland		FREEeste	United Kingdom	
Multipurpose terminal Adriaterminal	Netherlands				

Concessions to foreign companies in the Trieste port terminals: MSC, DFDS, Adria Port, HHLA PLT Italy, Evergreen Group, EMT, Ekol, Steinweg Group, Wärtsilä, Java Biocolloid Europe, British American Tobacco.

The port beyond the port

The traditional role of ports



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TRIESTE**

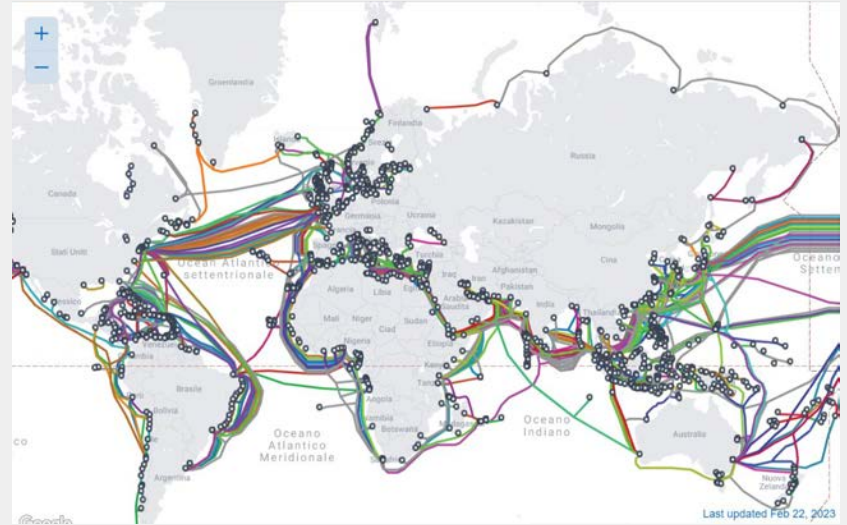
The crucial role of the sea

>90% of goods
transported by sea



Source: Marinetraffic density map.

>95% of data traffic
passing through the submarine cable network



Source: Submarinecablemap.com

A new protagonist in the value creation system

3 years of pressure on the global trade



**Covid-19
pandemic**



**Russo –
Ukrainian war
and related
sanctions**



Brexit



**Political
tensions in the
Middle East**



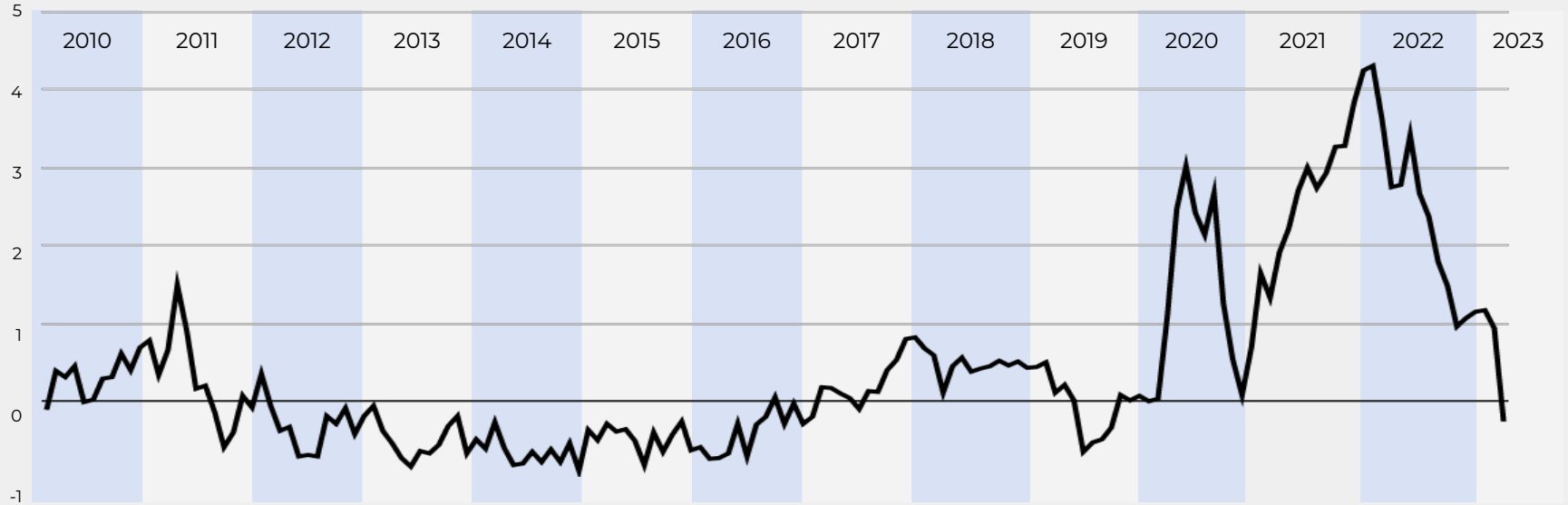
Blank sailing



**China – USA
trade war**

Reshaping supply chains

Global Supply Chain Pressure Index (GSCPI)



Source: Federal Reserve Bank of New York, Global Supply Chain Pressure Index - <https://www.newyorkfed.org/research/gscpi.html>.

Dual-sourcing will be more relevant than near-shoring and regionalisation

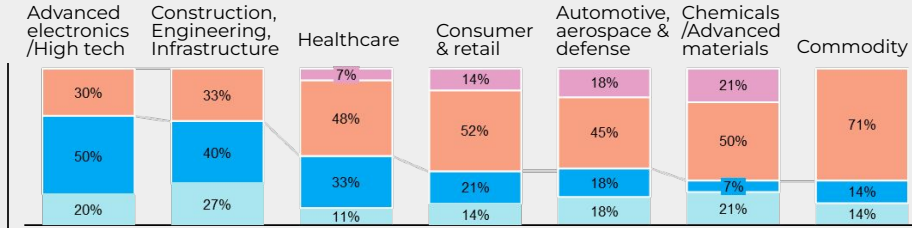
% of respondents per industry sector

Relevance in the next 3 years

Very relevant Relevant Partially relevant Not relevant at all

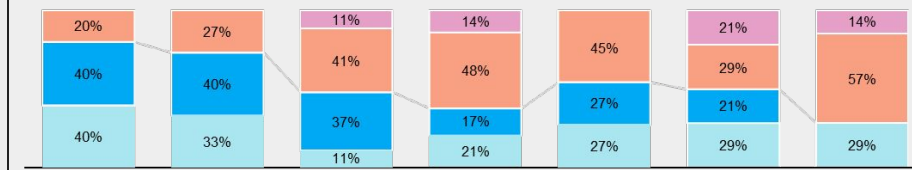
Near-shoring

(= sourcing from suppliers near sites OR producing in sites near customers)



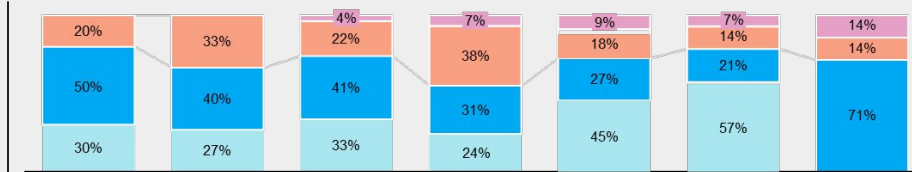
Regionalization

(= sourcing, producing, distributing within the region)



Dual-sourcing

(= sourcing from 2 different suppliers AND producing in 2 different sites)



Source: McKinsey survey of global Supply Chain leaders (March 28 – April 19, 2022, N=113)

Key insights

➤ Dual-sourcing is highly relevant across all industries and highest in chemicals

➤ Near-shoring and regionalization are mostly concentrated on high tech and construction

➤ Commodity, chemicals and automotive will primarily focus on regionalization and dual-sourcing

➤ Healthcare and consumer show a relatively even distribution across all 3 resilience measures

The impact of energy transition



SPACE

Land-use trade-off



FACILITIES

Service new energy



INFRASTRUCTURE

Enable new energy



CARGO FLOWS

New energy flows & processes



INDUSTRY

New technology cluster

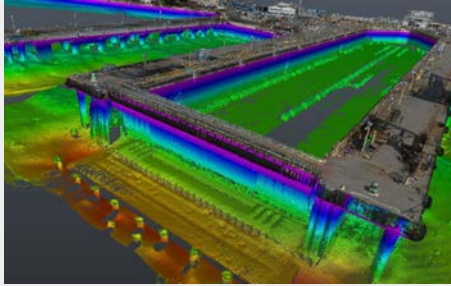
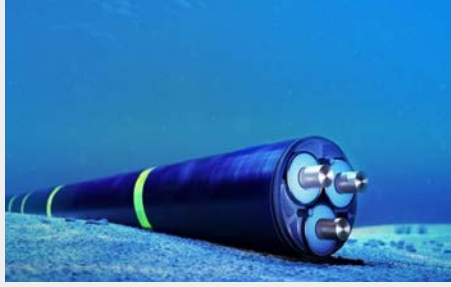
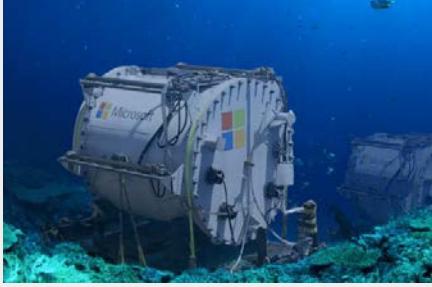


HUBS

Connectivity and alliances

Source: ESPO study "The energy landscapes" (2022).

Towards a new paradigm



Trieste Fresh Hub

1



FREEeste

2



Prosecco Fresh Hub

3



Orto Franco

Trieste: a deep connection between port and innovation

37/1,000

researchers

*European record

30+

research institutes



ICTP
OGS

**PORT OF
TRIESTE**



SISSA



University
of Trieste



MIB Trieste
School of
Management



AREA Science
Park



ELETTRA



National Institute for
Astrophysics

**Port of
Trieste**

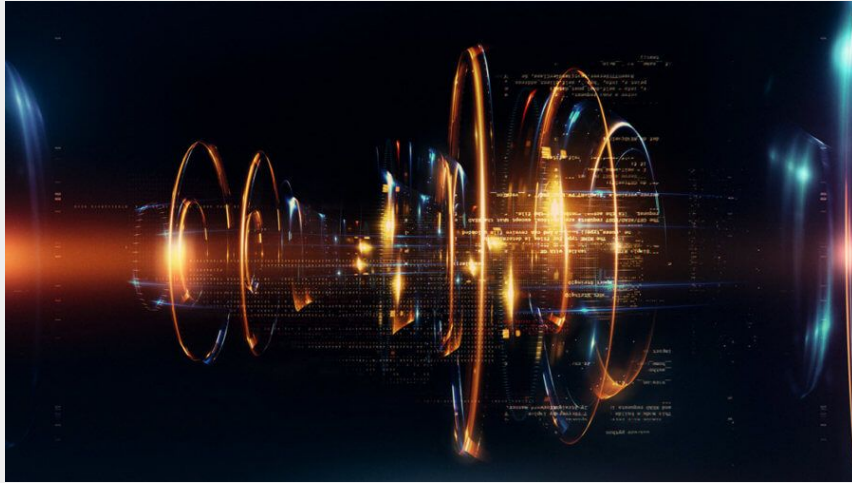


Baia di
Muggia

SLOVENIA SLOVENIA

The port of Trieste and Quantum communication

Study and application of Quantum communication
in the field of **transports and port logistics**





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