

# THE KEY ROLE OF THE MEDITERRANEAN IN THE TRANS-EUROPEAN TRANSPORT NETWORK:

**OPPORTUNITIES  
&  
CHALLENGES**



# MEDITERRANEAN MARCOECONOMIC FIGURES

We believe that the **Short Sea Shipping** industry has still **margin to growth** due to the current macroeconomic picture of the Mediterranean Area and of the rest of European countries

➤ Most of European economies are **recuperating pre-crisis levels**

GDP	2006	2007		2008	2009	2010	2011	2012	2013	2014	2015	2016	2017		2018
ITALY	+ 2 %	+ 1,4 %	2,2 TRILLE	- 1,5%	- 5,4%	+ 1,6%	+ 0,6%	- 2,8%	- 1,7%	+ 0,1%	+ 0,8%	+ 0,9%	+ 1,5 %	1,88 TRILLE	+ 1,5%
SPAIN	+ 4,1%	+ 3,7 %	1,08 TRILLE	+ 1,1%	- 3,6%	+ 0,01%	-1,0%	- 2,9%	- 1,7%	+ 1,4%	+ 3,2%	+ 3,2%	+ 3,2 %	1,15 TRILLE	+ 2,5%

➤ **New markets** could be developed due to **growing economies** ➔ **Morocco, Tunisia, Algeria, Turkey**

GDP	2009	2016	2017	2018
MOROCCO	93 B\$	101 B\$	+ 4,4 %	+ 3,9 %
TUNISIA	43 B\$	42 B\$	+ 2,3 %	+ 3,0 %
ALGERIA	137 B\$	156 B\$	+ 1,3 %	+ 0,3 %
TURKEY	644 B\$	857 B\$	+ 2,9 %	+3,3 %

TRADE FLOWS WITH SPAIN *	2009	2016
MOROCCO	7,0 B\$	11,9 B\$
TUNISIA	1,3 B\$	1,3 B\$
ALGERIA	8,3 B\$	7,4 B\$
TURKEY	6,5 B\$	10,7 B\$

\*IMPORT + EXPORT

➤ **Commercial trading** between **Italy** and **Spain** ➔ **+ 5,6%** in 2016 & **+12,3%** during the first semester of 2017

➤ **2016 new vehicles export** from Spain **growth by 7%** respect to the previous year ➔ **2,43 mln exported units** with an overall value of **37,7 billions**

# POSSIBLE GROWTH MARGIN FACTS



➤ **10.000 trucks** are still crossing everyday the border at “La Junquera” ➔ Grimaldi carries approx. **1.000 per day** between Spain and Italy

➤ **2018 forecast** for Spanish economy should be positive, if political stability will be granted ➔ **Expected GDP +2,5 %**

➤ Ro-Ro and ferry industry sector moves **10 mln trailers in the Mediterranean** and **10 mln in the North of Europe Area** out of a total of 40 mln trailers per year ➔

	NORTH-EUROPE AREA	MEDITERRANEAN AREA
AVG. GDP	+2 %	+2,3 %
POPULATION	240,5 mln	338,5 mln

2016, World Bank

➤ Based on the difference of population of both areas and on the growth trend of the countries taken into consideration we conclude that **Med Ports** still have margin to **develop more volumes** for the industry

# FLEET UPDATE & NEWBUILDING INVESTMENTS

**Grimaldi Group** is constantly seeking to increase economy and environmental efficiency by introducing more **advanced newbuilding** in the market and updating its existing vessels

- **12 newbuilding** project to be delivered by 2020 over **1 billion investment**
- Vessel **jumboisation** ➡ **Increasing the intake capacity by 100%** (up to 500 trailers) and keeping the same fuel consumption will allow us to apply new economies of scale and at the same time maintaining polluting emissions unchanged
- Over **155 mln € invested** on strategic retrofits ➡ silicon painting, smart steaming, tailored propellers, scrubbers, etc.
- **New generation** of vessels ➡ **Ø CO2 emissions** during docking in ports

# TERMINAL INFRASTRUCTURE

Improving our **Terminal infrastructure** and investing in **new technologies** in order to operate new generation of vessels for the expected growing demand

- **Grimaldi Terminal Barcelona** ➡ A project for an **extension of 40.000 m<sup>2</sup>** of concession areas intended for terminal activities has been presented
- **Grimaldi Terminal Valencia** ➡ Building of a **cars silos** with an extension of **200.000 m<sup>2</sup>** and a capacity of **10.400 new cars** estimated to be completed by **March 2019**
- **Grimaldi Sardegna** ➡ The **Passenger Terminal infrastructure** of Porto Torres and Cagliari have been **renovated** to better accommodate the increase of demand of tourists to this destination
- **Digitalization** ➡ Developing a system for all the Short Sea Shipping network to **integrate terminal and agencies activities** and at the same time **adding value** to the service provided to our customers

# CONCLUSIONS & EXPECTED REGULATIONS

- **Spanish stevedores system** ➔ A final **conclusion of the conflict** must be reached in order to guarantee the competitiveness of Spanish ports on the long term
- **Incentive sustainable vessels** ➔ Study **special port tax conditions** for most sustainable vessels with **Ø CO2 impact**
- **Digitalization support** ➔ Incentives to support **investments on new technologies**
- **Increase the efficiency of tecnonautical services** ➔ **Moorin & Pilot** services
- **European Ecobonus** ➔ **Italy, Spain, France & Portugal** should present their final project to the EU Commission by the end of 2017

# A.L.I.S. ASSOCIATION OF LOGISTICS AND SUSTAINABLE INTERMODALITY

**A.L.I.S** comes from many entrepreneurs willing to focus more and more on **environmental sustainability** through the concept and practice of **intermodality**

- **1.220** members
- **140.500** labor force units
- **2.700** maritime connections
- **120** motorways of the sea
- **200** InfoPoints & offices

**CONFALIS** is an organization which aims to be an important **connection** for institutional relations and interactions between **governments** and **private interests**

- **33.000** companies
- **320.000** labor force units
- **200** InfoPoints & offices





# Thank You

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