
Maritime services of container ships operators in the Mediterranean Sea

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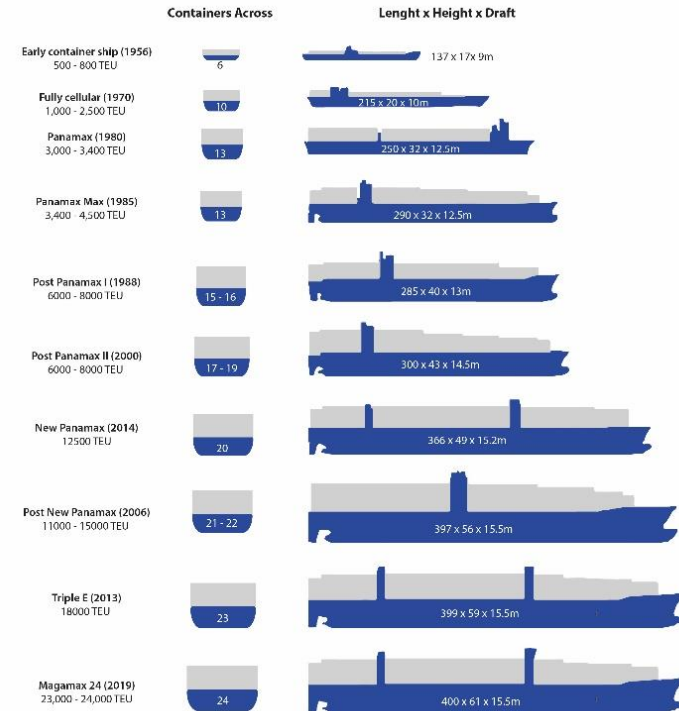
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Introduction

- Since the 2000s, the size of container ships has grown exponentially (8,000 TEU max in 2000 and 24,000 TEU now),
- The economic and industrial development of Southeast Asia, and China in particular, has placed this region at the heart of world trade.
- Passage through the Panama Canal was no longer necessary, and many container ship operators adapted their services.
- Containerised maritime transport has therefore developed very speedily and has undergone major upheavals in maritime organisations and operators' strategies in recent years

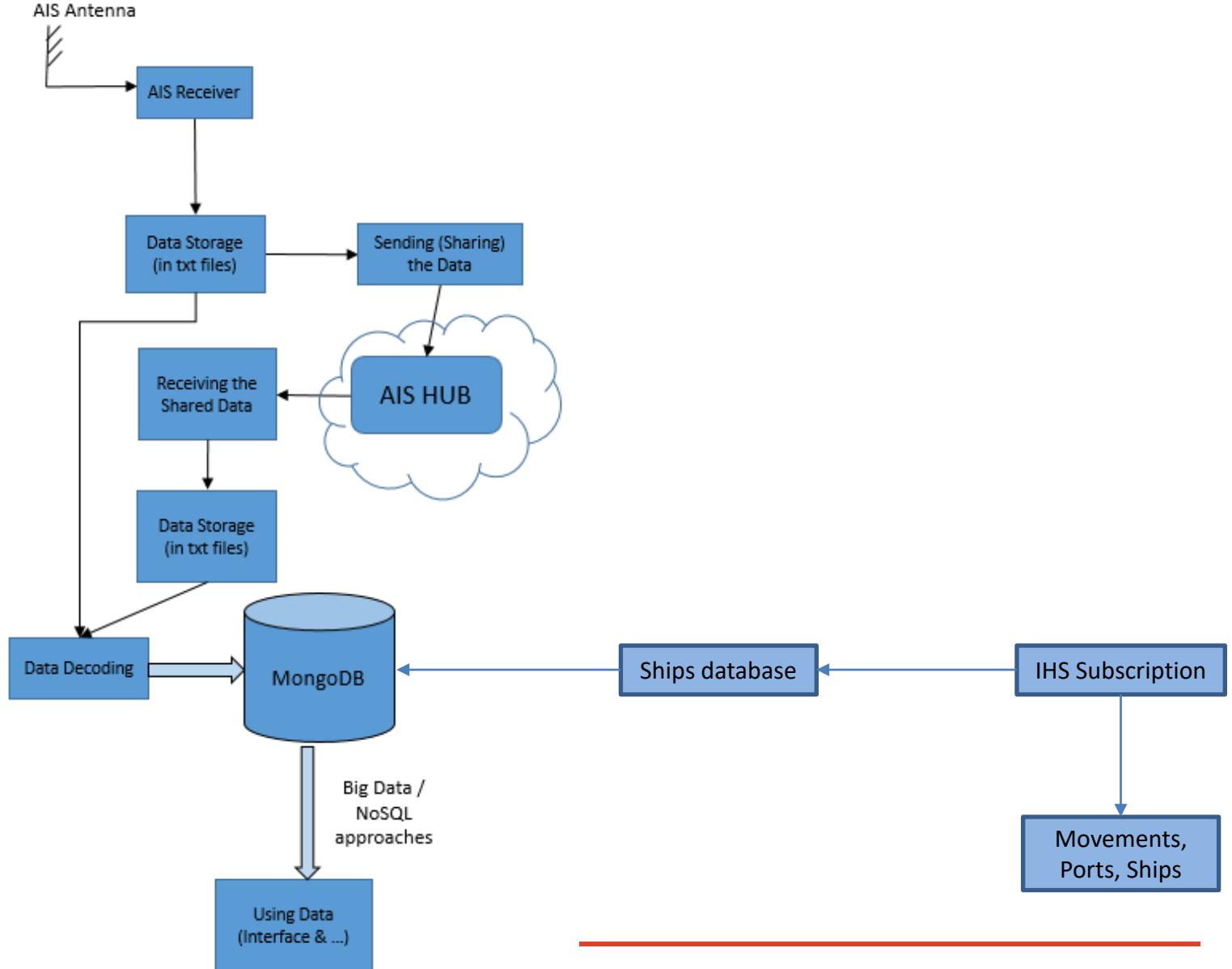
what is the impact of the increasing size of container ships on europe's mediterranean ports?



Study framework



MARitime CIRculation (CIRMAR)



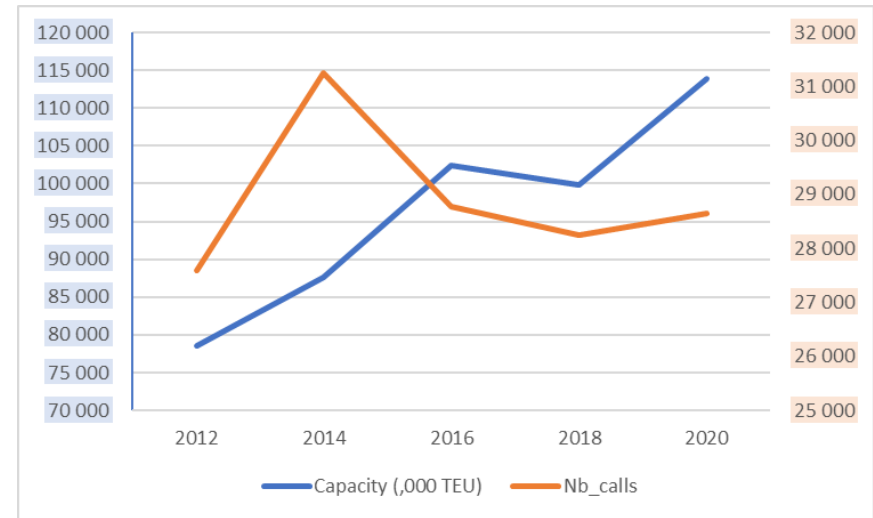
Results

Overall approach

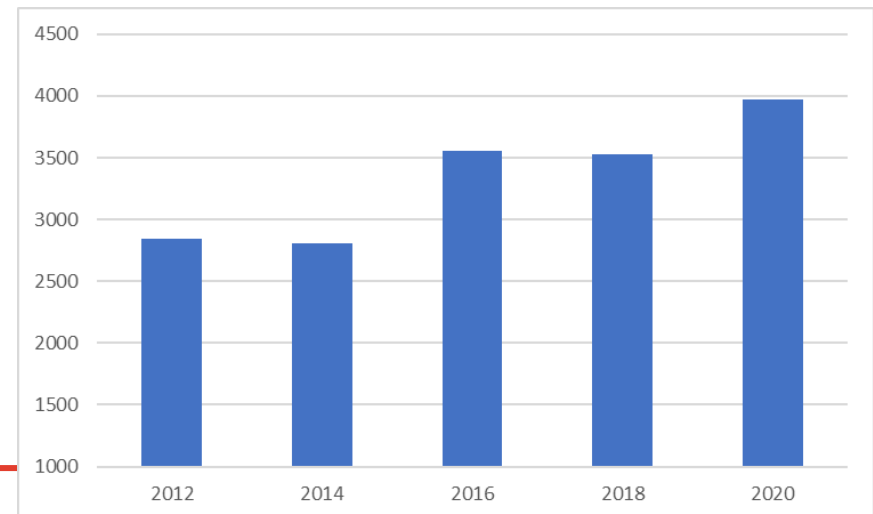
- Increase total capacity by 45% between 2012 and 2020.
- The number of calls remained stable despite a peak in 2014.
- Increase in the average size of container ships calling from 2845 TEU to 3974 TEU : + 40%

➔ **significant increase in the size of container ships calling at Med-Sea ports**

Number of calls and the total capacity of container ships



Average size of container-ships

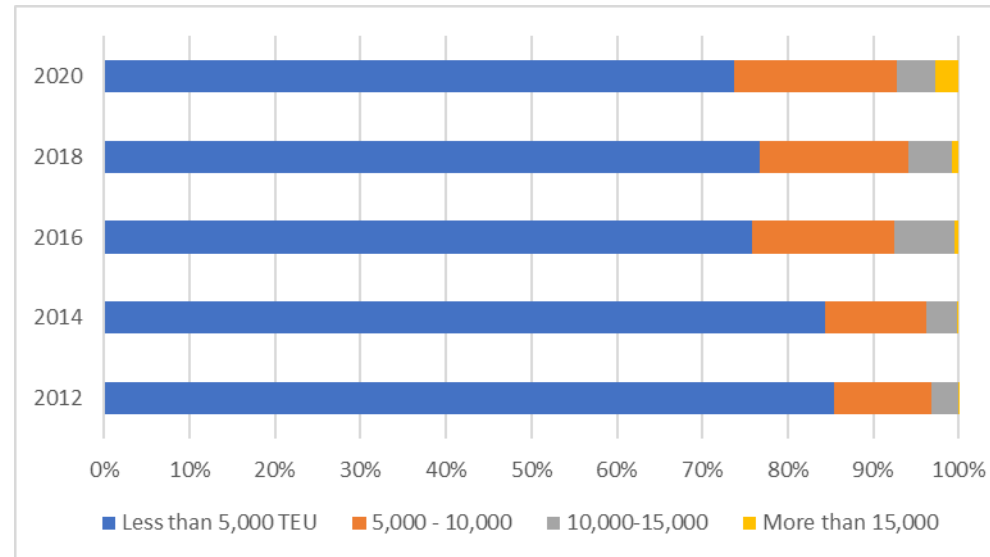


Results

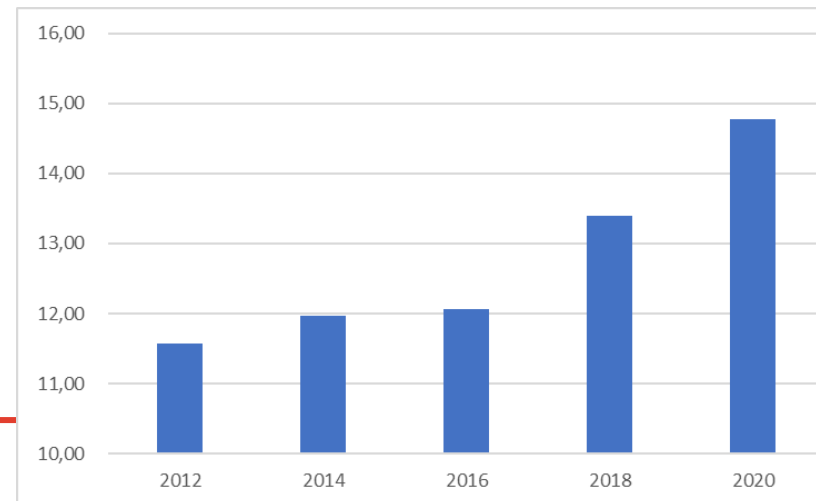
Overall approach

- Increase in the share of large ships in port calls.
- Ageing of container ships in port: from 11.6 years to 14.8 years. This is faster than the trend observed worldwide according to an UNCTAD study (11.3 in 2012 to 13.5 in 2020).

Evolution of port calls by size category



Evolution of the age of container ships calling



Results

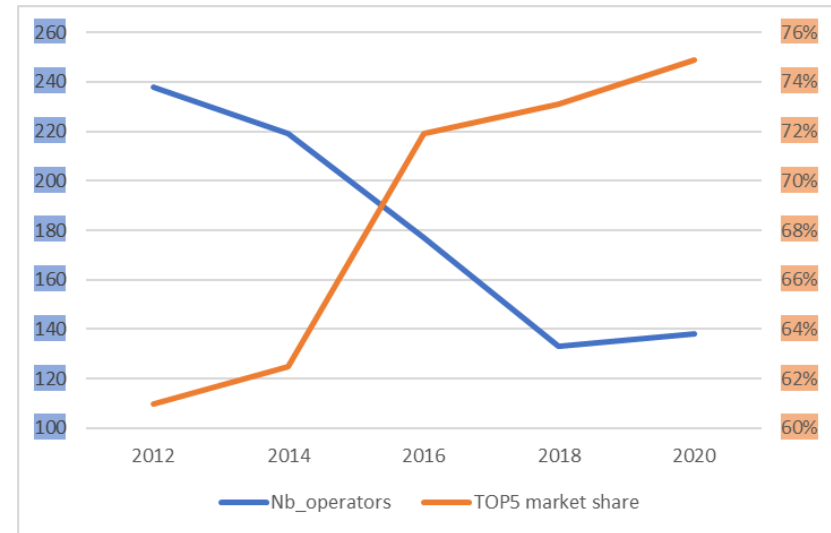
Overall approach

- Reduction in number of operators from 238 to 138 : -42%.
- Increase in market share for the 5 largest operators : +14 percentage points.

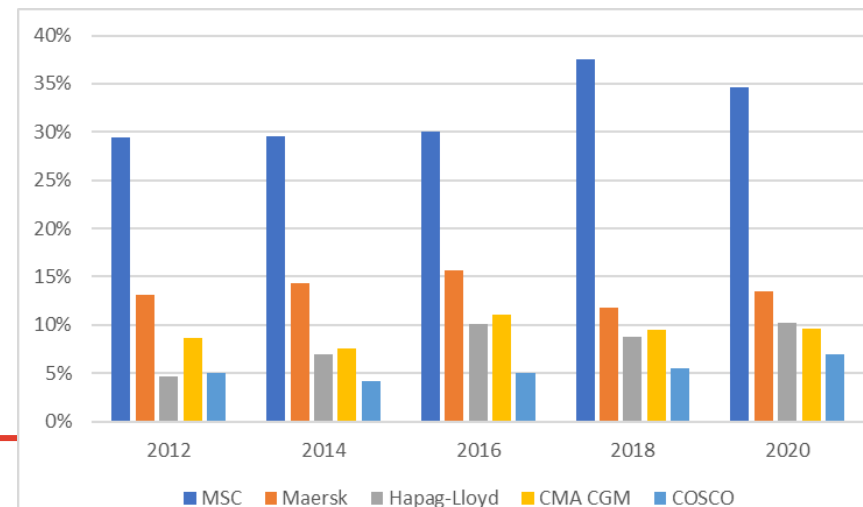
➔ Many small regional operators have disappeared or been bought up by larger operators

➔ Concentration of maritime transport services.

Evolution of the number of operators and top 5 market share



Top 5 market share

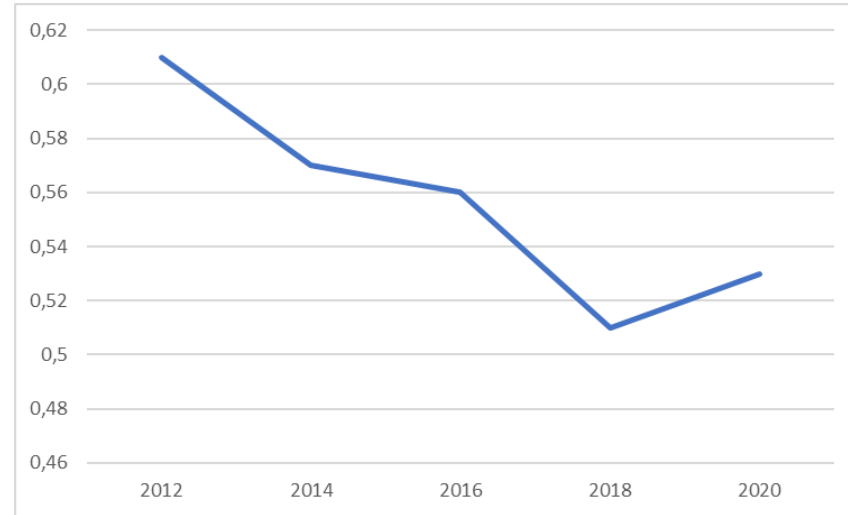


Results

Analysis of port passage

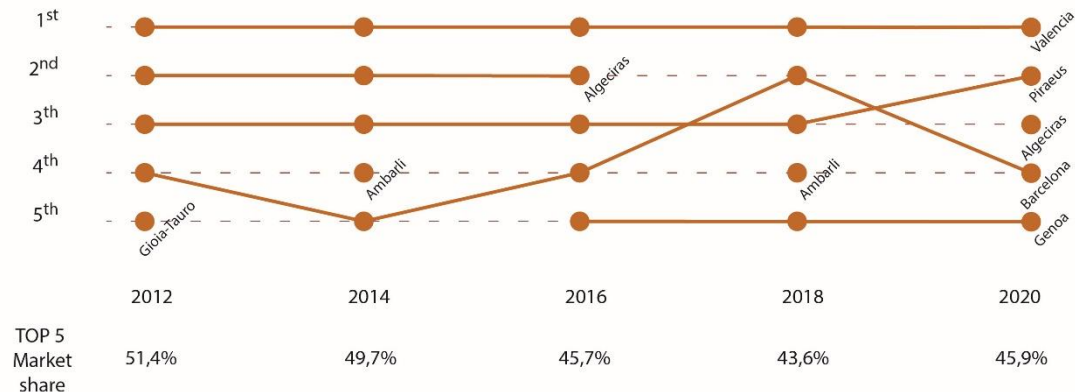
- Gini index, decrease: better distribution of transport supply between ports.
- Analysis of top 5 market share: gradual decline except for a rebound in top 5 market share in 2020 → From 51.4% to 45.9%.

Gini index

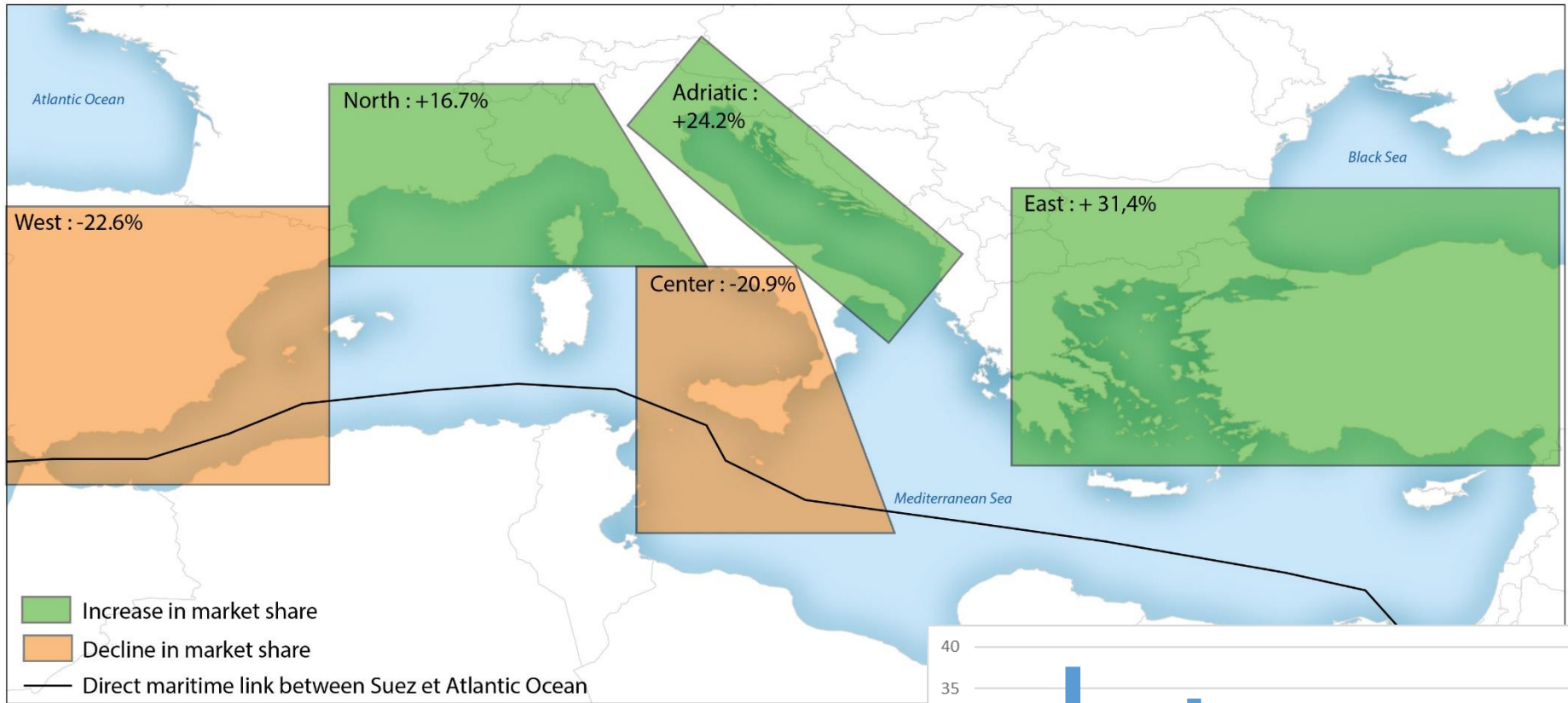


→ Deconcentration of shipping services

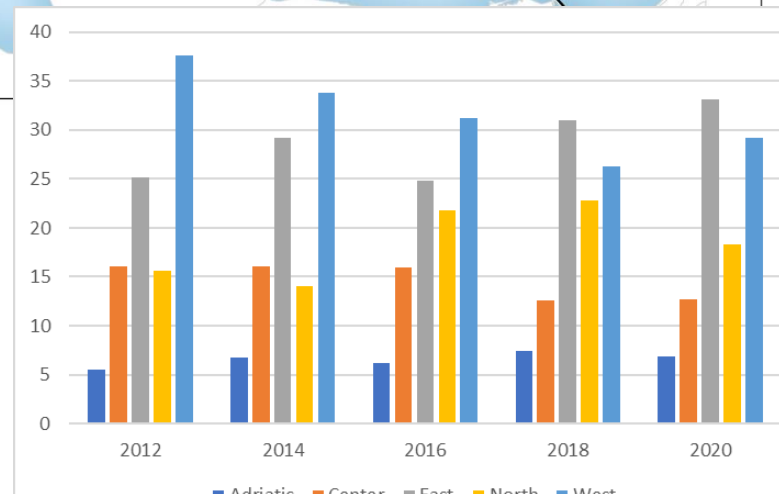
Top 10 Med-Sea ports by capacities



Results



Market share of different zones (according to capacities offered in calls)



Conclusion

Main conclusion of our analysis :

- Significant increase in the size of container ships calling at Med-Sea ports and for the total capacity;
- Increase in the share of large ships in port calls;
- Many small regional operators have disappeared or been bought up by larger operators;
- Concentration of maritime transport services;
- Deconcentration of the maritime ports services;
 - better distribution of transport supply between ports
 - Decrease in TOP 5 market share.
- Increased market share for remote ports on the direct shipping route between the Suez Canal and the Strait of Gibraltar.

Thank you for your attention !

Gracias !



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