



DEVPOR

ides
UMR6266 CNRS Le Havre

PIRAEUS

TANGER MED

SHIPPING IN THE MEDITERRANEAN SEA: CHALLENGES AND PERSPECTIVE

Dr. Hab. Arnaud Serry, University Le Havre Normandie, France



INTRODUCTION



THE UNIFICATION OF THE MEDITERRANEAN THROUGH TRADE IS AN ANCIENT FACT.



CONTEMPORARY MARITIME TRANSPORT IS A GLOBALIZED SYSTEM, IN WHICH CERTAIN PLACES (THE STRAIT OF MALACCA, THE PANAMA CANAL, ETC.) AND CERTAIN AREAS PLAY A SPECIAL ROLE. THE MEDITERRANEAN SEA IS ONE OF THESE.



AS A RESULT OF ITS POSITION, THE MEDITERRANEAN IS A MAJOR TRANSIT ROUTE AND, MORE RECENTLY, A TRANSshipment AREA FOR INTERNATIONAL MARITIME TRANSPORT, AS WELL AS A ZONE OF INTENSE TRAFFIC DUE TO INTRA-MEDITERRANEAN MARITIME TRAFFIC, PARTICULARLY RO-RO.

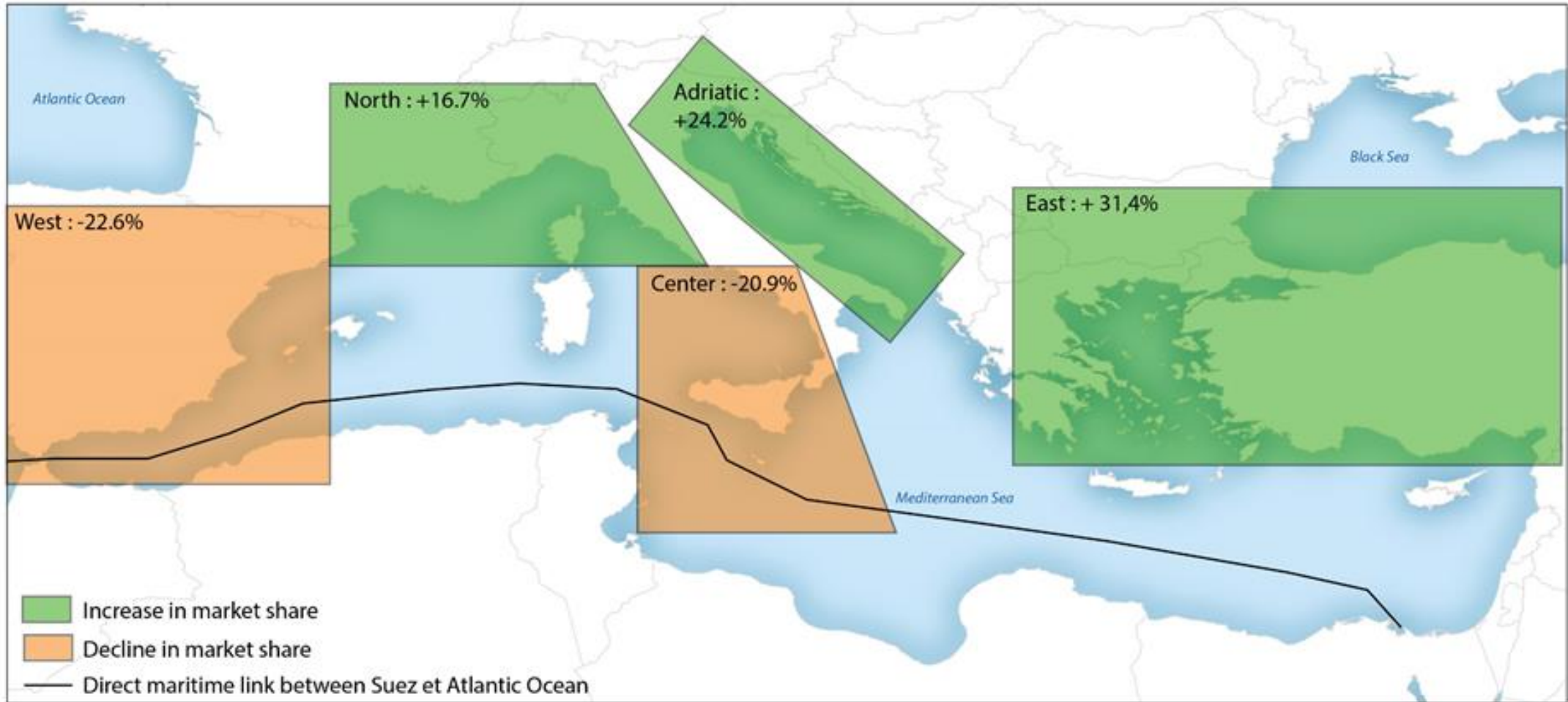
MEDITERRANEAN SEA PORTS OVER 20 MT



MAIN CONTAINER PORTS IN IN 2022

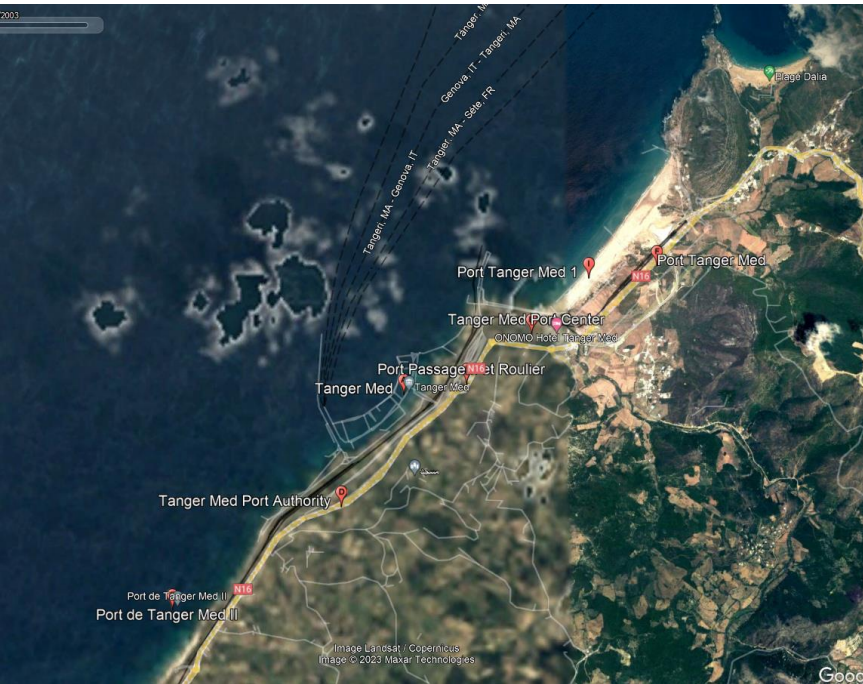


MARKET SHARE BY AREA



TANGER MED

Diachronic evolution of Tanger-Med port infrastructures



2003



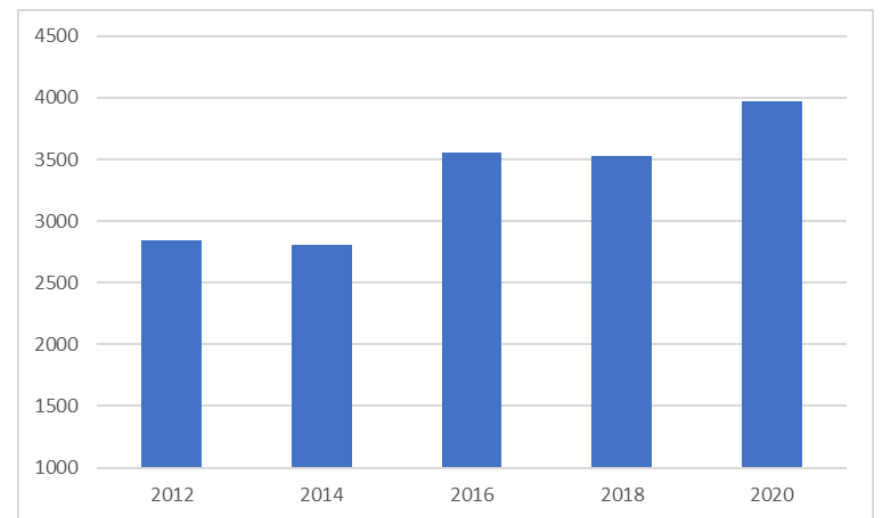
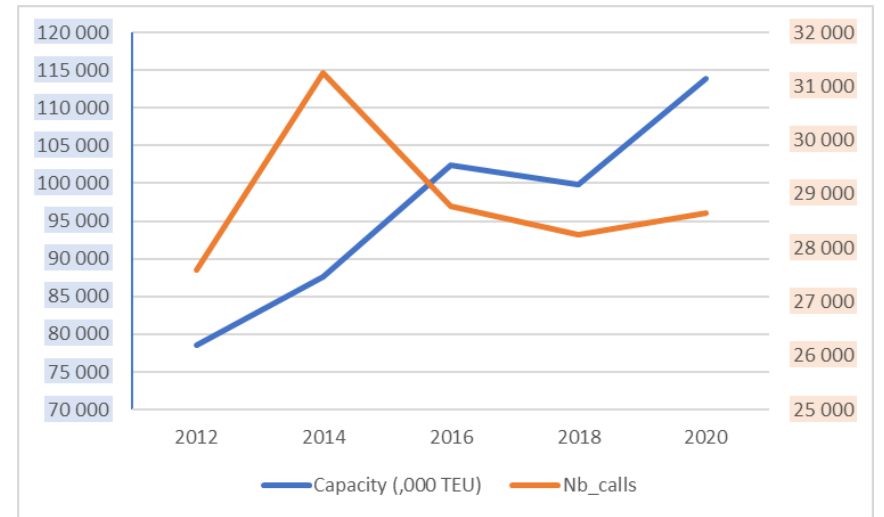
2013



2023

WHAT ABOUT CONTAINERSHIPS ?

- Capacity increase 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**



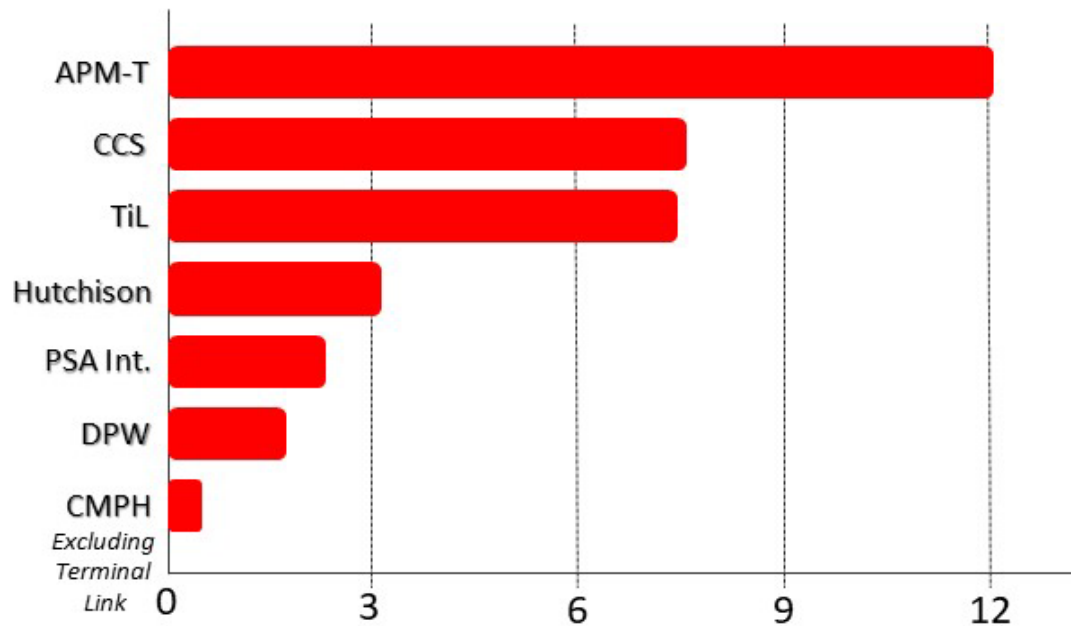
CONTAINER HANDLING OPERATORS IN 2021

#1 PSA Int.	#2 APM-T	#3 CCS	#4 CMPH	#5 DPW	#6 Hutchison	#7 TIL
Genoa – PSA (62%)	Marseilles – 2XL (41,7%)	Valencia – CSP (51%)	Ambarli – Kumport (40%)	Marseilles – EUROFOS (50%)	Barcelona – BEST (100%)	Valencia – MSCCT (100%)
Genoa – SECH (62%)	Barcelona – TCB (100%)	Savona – VADO (40%)		Tarragona – TCT (60%)	Alexandria – AICT (80,3%)	Marseilles – 2XL (50%)
Venice – Vecon (60%)	Valencia – TCV (75%)	Savona – VLS (40%)		Algiers – DPWD (50%)	Abu Qir (100%)	Genoa – CBCT (100%)
Mersin – MIP (50%)	Castellon – TPC (100%)	Ambarli – Kumport (26%)		Djen-Djen – DPW (50%)		Tanger Med – TC2 (20%)
	Algesiras – APMT (100%)	Port-Saïd – SCCT (20%)		Constanta – CSCT (100%)		Gioia Tauro – MCT (100%)
	Savona – VADO (50,1%)	Piraeus – PCT (100%)		Yarimca – DPWY (100%)		Trieste – TMT (50%)
	Savona – VLS (50,1%)	Piraeus – PPA- P1 (67%)		Limassol – DPWL (75%)		Asyaport – ACT (70%)
	Tanger Med – TC1 (90%)			Pivdennyi (51%)		Iskenderum – ALAS (50%)
	Tanger Med – TC4 (80%)					Ashod – HCT (100%)
	Rijeka – ZCT (51%)					Ambarli – MM& WT (50%)
	Port-Saïd – SCCT (55%)					

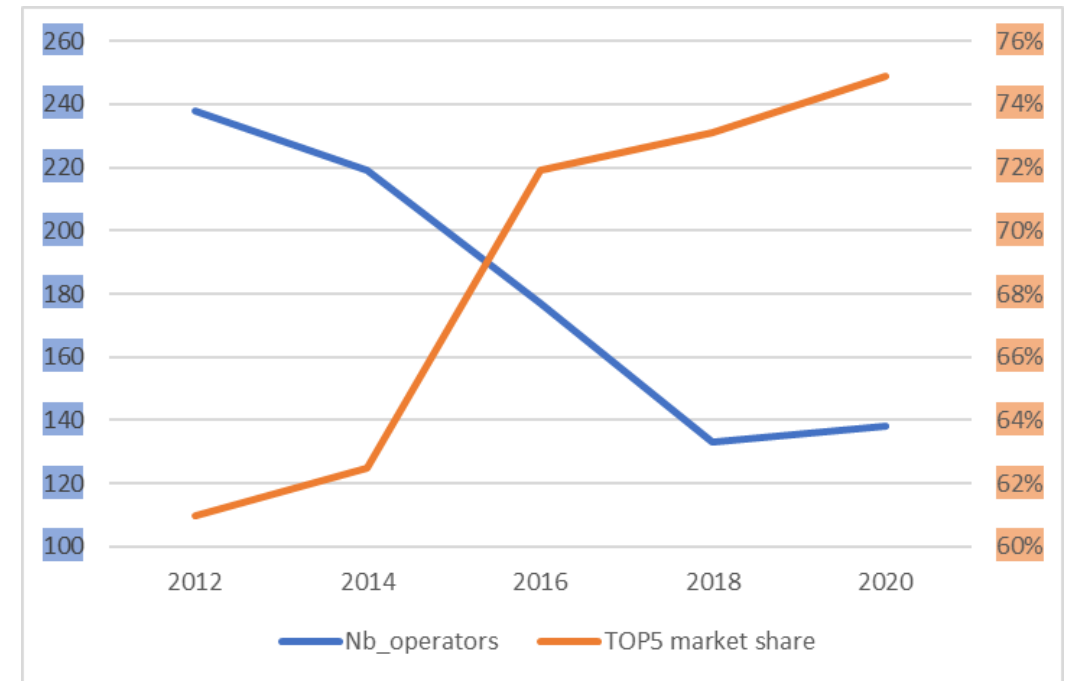
Genoa : Port SECH : Container Terminal (50%): Share-holding - Container Terminal

- #1: Port of Singapore Authority International (**Singapore**)
- #2: APM-Terminals (**Denmark**)
- #3: China Cosco Shipping (**China**)
- #4: China Merchants Port Holdings (**China**) – *Excluding Terminal Link (49)*
- #5: DP World (**Dubai**)
- #6: Hutchison Ports (**Hong-Kong/China**)
- #7: Terminal Investment Limited (**Switzerland**)

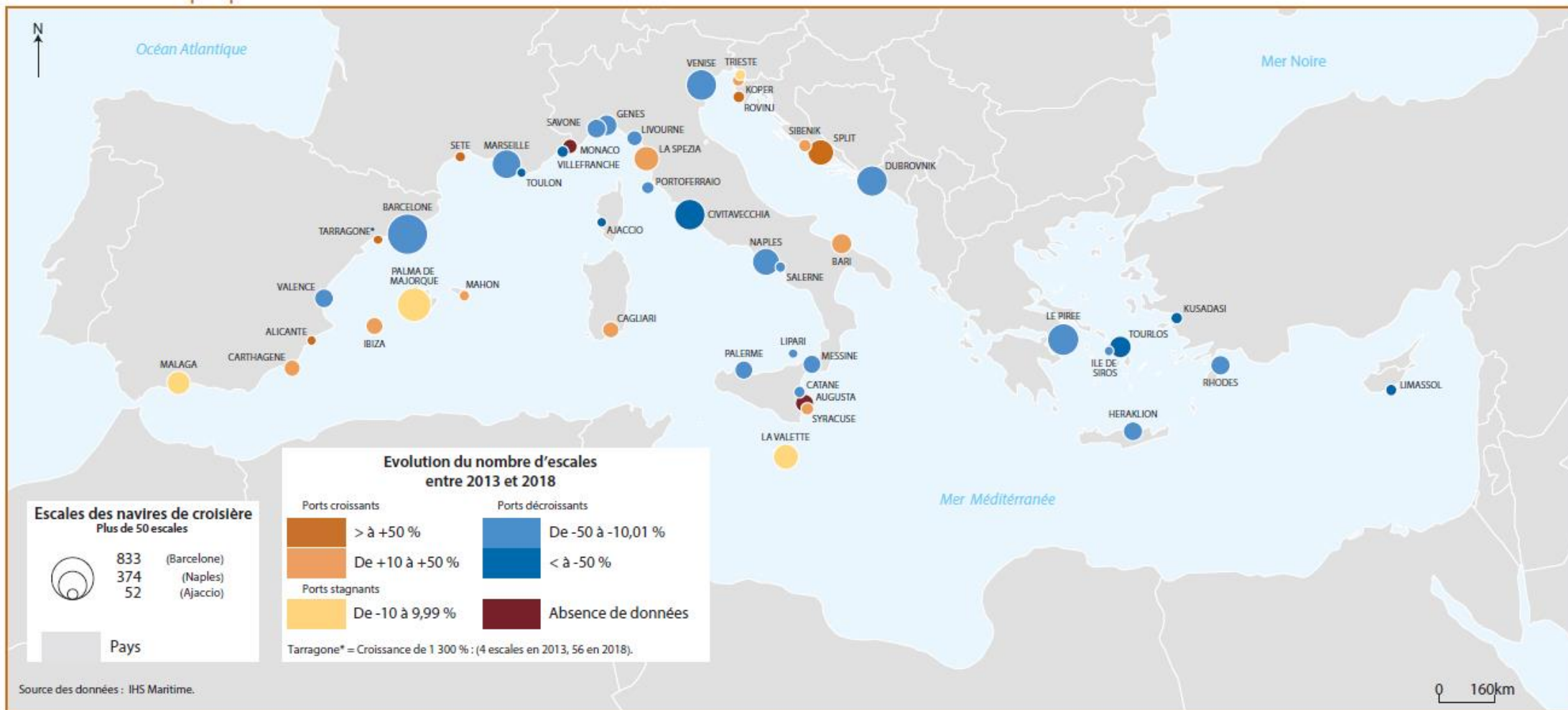
THE GLOBAL CONTAINER TERMINAL OPERATORS' EQUITY BASED THROUGHPUT ON THE MEDITERRANEAN CONTAINER MARKET



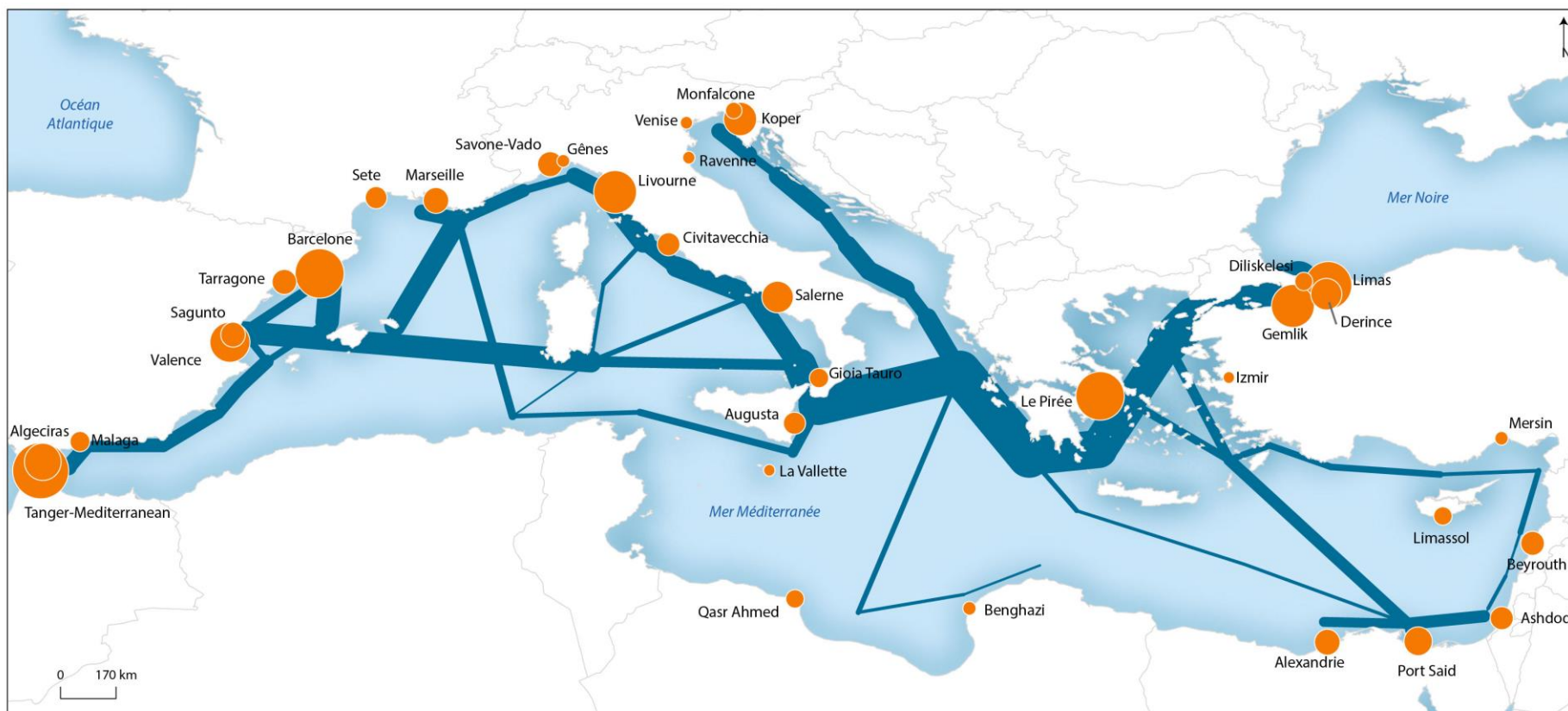
Evolution of the number of operators and top 5 market share



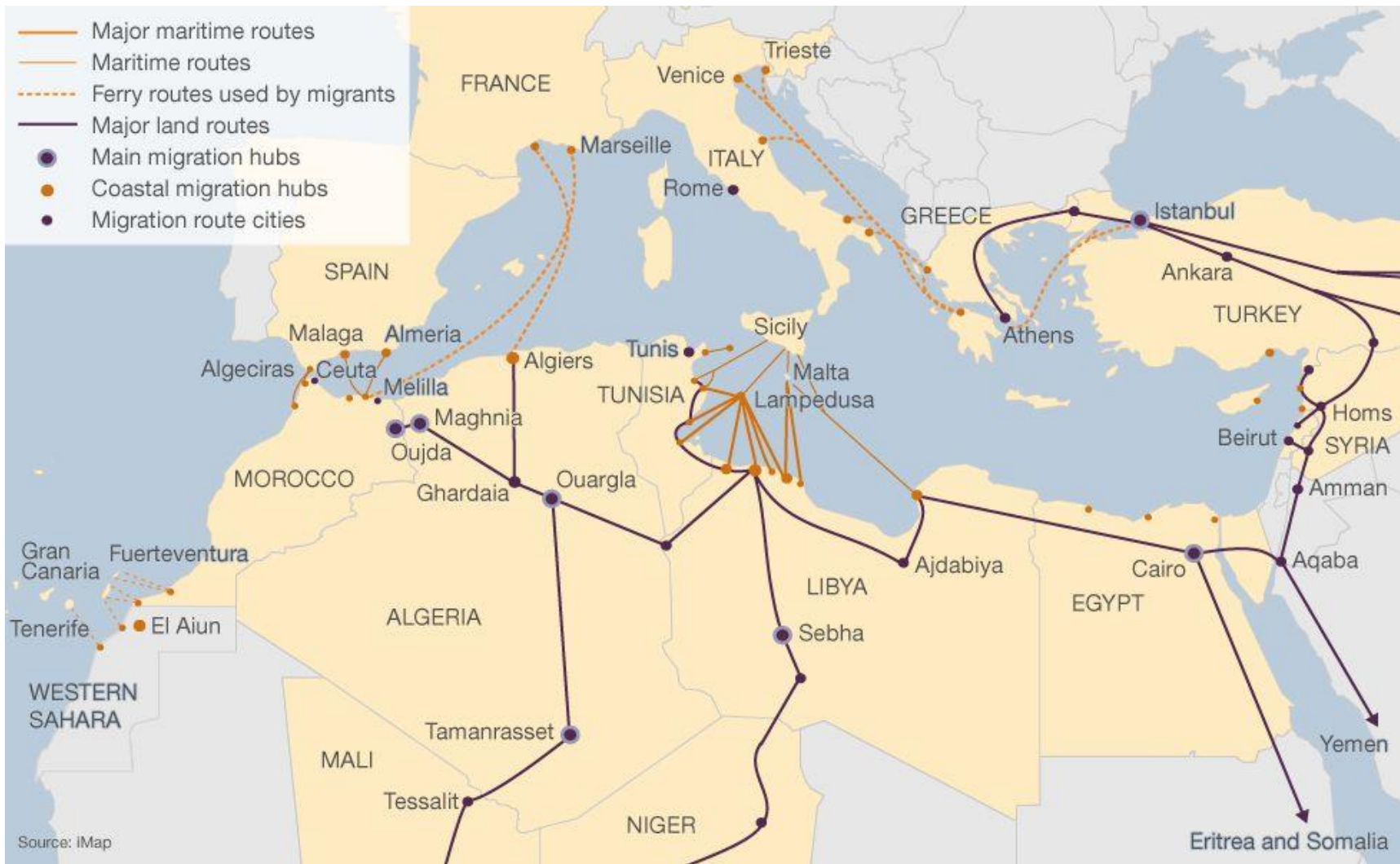
CRUISES



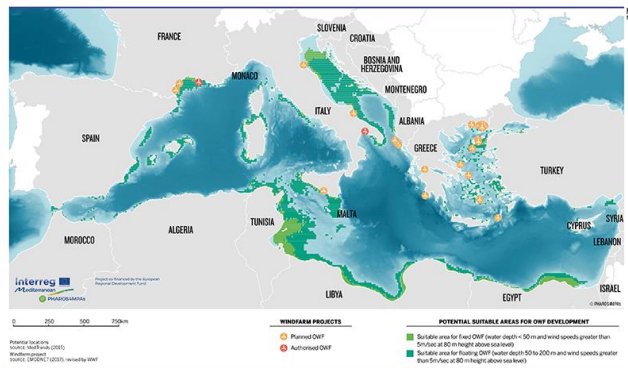
RO-RO TRAFFIC



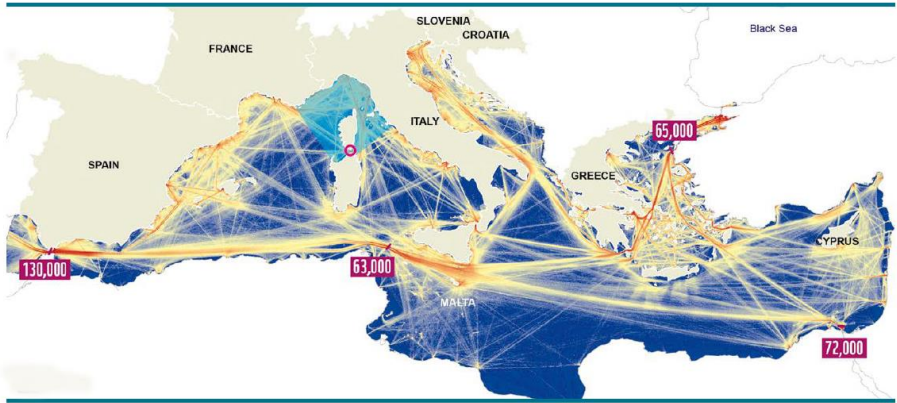
MORE CHALLENGES... MIGRATIONS



... ENVIRONNEMENT



Potential areas suitable for OWF development, and planned and authorized OWF projects in the Mediterranean Sea



MEDITERRANEAN EU COUNTRY

DENSITY OF VESSEL TRACKS
TOTAL OF DIFFERENT VESSELS INVOLVED: 38,897
 Interpolation / Log scaling / Year 2014

HIGH **LOW**

MAX = 166,966* MEDIAN = 418* MIN = 1*

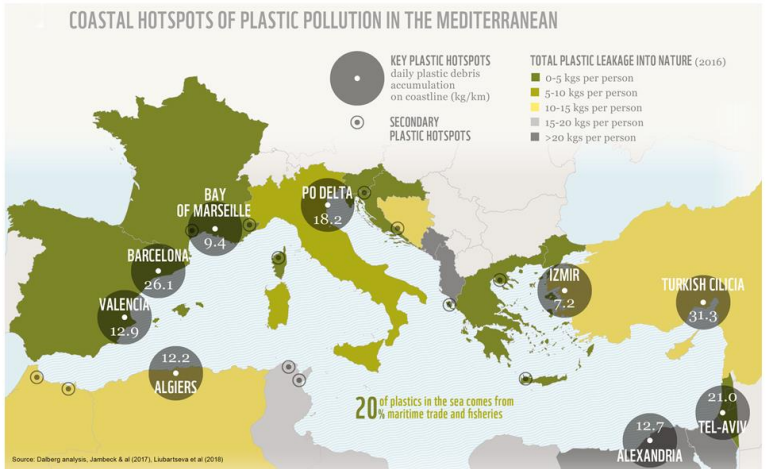
*In 1 pixel of 1x1 km

Source: AIS density maps by **navama** technology for nature

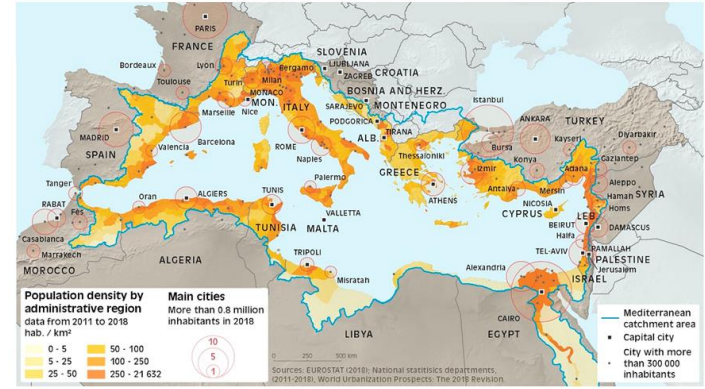
PARTICULARLY SENSITIVE SEA AREAS (PSSA)

○ STRAIT OF BONIFACIO
 ■ IN PROJECT AREA

Source: IMO <http://pssa.imo.org/> (2015) / MAPAMED (2014)



Source: Daberg analysis, Jambeck & al (2017), Lubutseva et al (2018)

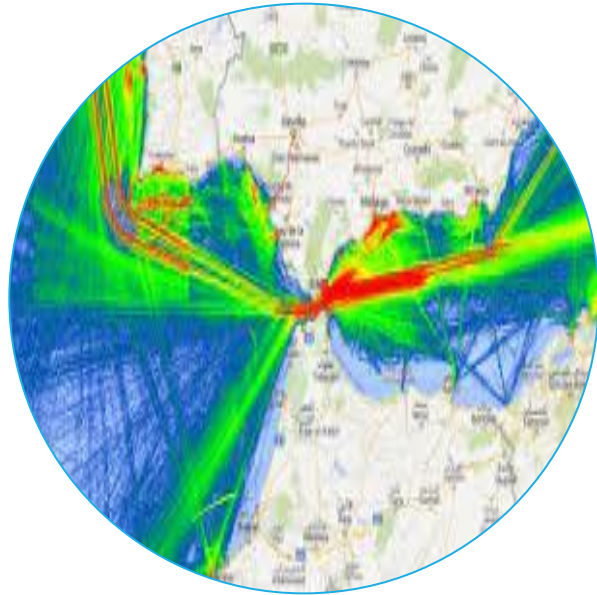


Population density by administrative region data from 2011 to 2018

Main cities More than 0.8 million inhabitants in 2018

Source: EUROSTAT (2018), National statistics departments, (2011-2018), World Urbanization Prospects: The 2018 Revision

CONCLUSION



DIVERSITY OF PORT PROFILES IN THE MEDITERRANEAN (INTERCONTINENTAL TRANSSHIPMENT HUB, GATEWAY, REGIONAL PORT, SPECIALIZED NORTH-SOUTH PORT, ETC.)



INTENSIFYING COMPETITIVE COMPLEMENTARITY BETWEEN PORTS ON THE WESTERN AND EASTERN MARGINS OF THE MEDITERRANEAN



THE DEVELOPMENT OF PORTS AROUND THE MEDITERRANEAN COULD PROVIDE EUROPE'S HUGE CONSUMER MARKET WITH A MEANS OF SECURING SUPPLIES AND REDUCING THE CARBON FOOTPRINT OF TRANSPORT

THANK YOU...



DEVPORT

<https://www.projet-devport.fr/>



Baltic Seas

Baltic Sea Conference
Edition V
The Baltic Sea
in Transition(s)

10 - 12th
DECEMBER 2024

Tallinn and Kotka

AMBASSADE DE FRANCE EN ESTONIE

FONDATION Sefacil ides Le Havre

PORT OF TALLINN The Port of Good News

AMBASSADE DE FRANCE EN ESTONIE

UNIVERSITE DE LA HAVRE NORMANDIE

XAMK

...JOIN US