



# Shortsea Shipping: Challenges and prospects

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Piraeus, 2016

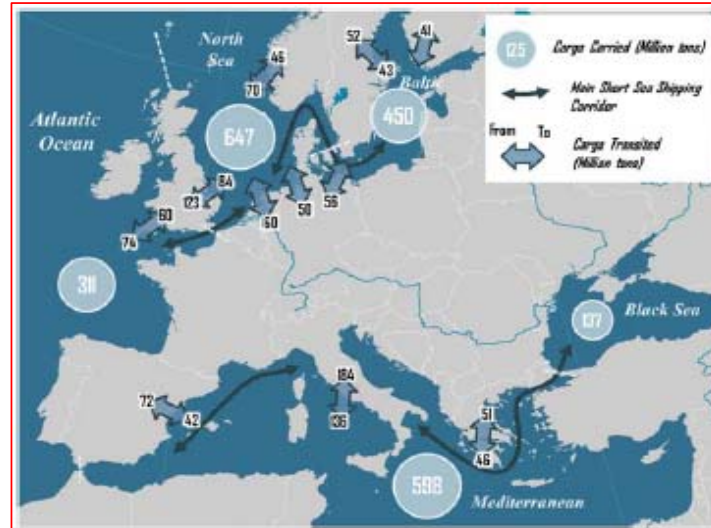
# Short Sea Shipping

*“Short sea shipping means the movement of cargo and passengers by sea between ports situated in geographical Europe or between those ports and ports situated in non-European countries having a coastline on the enclosed seas bordering Europe”*

*(COM(1999) 317 final)*

***Distance define SSS***

*(Suarez-Aleman,2015)*

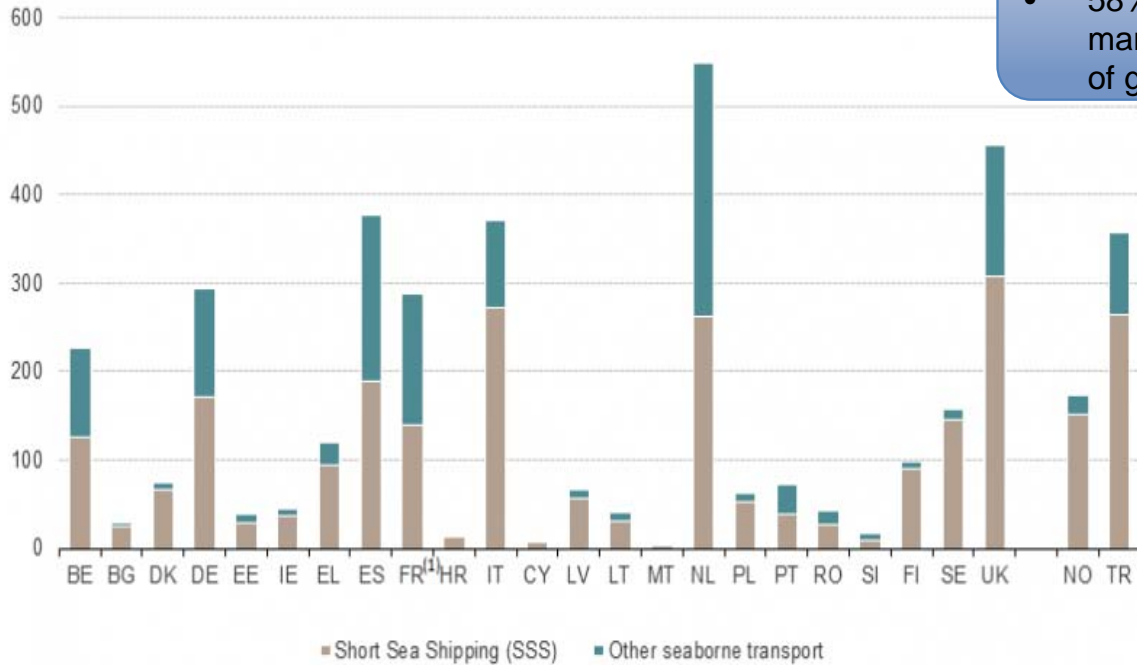


“as commercial waterborne transportation that does not transit an ocean. It is an alternative form of commercial transportation that utilizes inland and coastal waterways to move commercial freight from major domestic ports to its destination.”

*The United States Department of Transportation’s Maritime Administration (MARAD)*

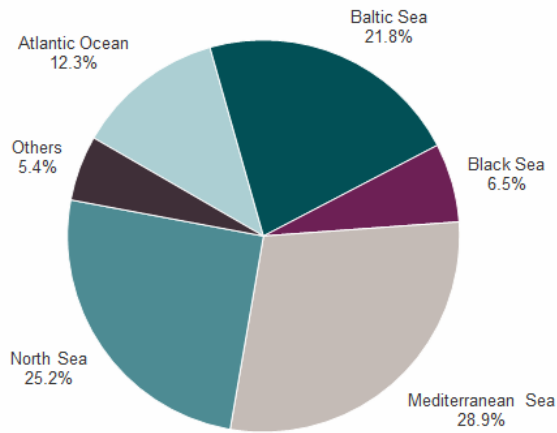
# SSS in Europe

- 2013: 1,7 billion tonnes of freight
- 58% of total EU-28 maritime transport of goods



- Future SSS estimates: 5,3 billion tonnes in 2018 {COM(2009)8}
- Growth: 30-50% for the 2030-2050 {COM (2011)}

# SSS in Europe



**Mediterranean: 570 million tonnes (29%)**

North Sea: 498 million tonnes (25%)

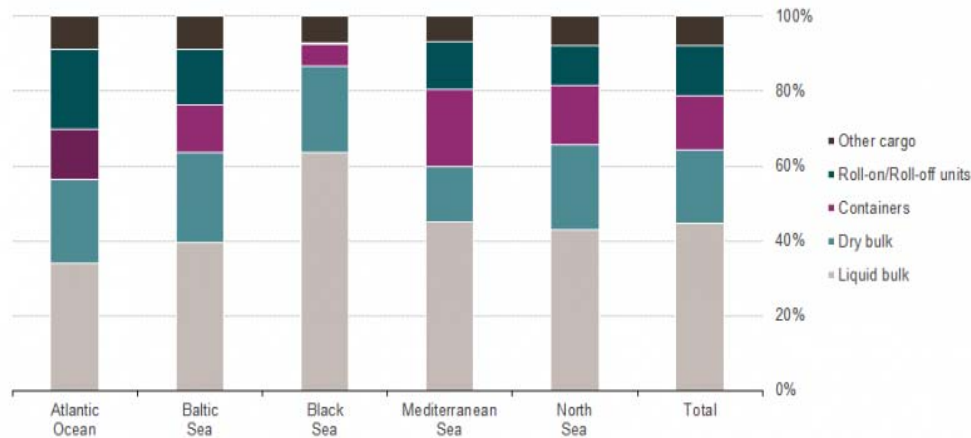
Baltic Sea : 430 million tonnes (22%)

**Liquid bulk: 45%**

Dry bulk: 20%

Containers: 14%

Ro-Ro: 13%



# Top SSS ports

Rank 2013	Ports	(1)	Total SSS	Growth 2012-2013	Share of EU-28 SSS (%)	Other seaborne transport
1	Rotterdam (NL)	=	188.0	-0.8	7.9	218.5
2	Antwerpen (BE)	=	90.4	+4.5	3.8	81.6
3	Hamburg (DE)	+1	49.9	+10.5	2.1	70.6
4	Marseille (FR) <sup>(2)</sup>	-1	45.6	-14.5	1.9	30.7
5	Immingham (UK)	=	42.6	-0.6	1.8	20.0
6	Amsterdam (NL) <sup>(3)</sup>	+3	41.8	+21.4	1.8	51.4
7	Trieste (IT)	+1	36.6	+2.5	1.5	9.4
8	Göteborg (SE)	-1	34.0	-7.2	1.4	4.4
9	London (UK)	-3	33.8	-8.0	1.4	9.4
10	Algeciras (ES)	+3	32.7	+10.0	1.4	41.0
11	Le Havre (FR) <sup>(2)</sup>	+1	30.6	+0.8	1.3	33.8
12	Rīga (LV)	-1	30.4	-4.0	1.3	3.6
13	Genova (IT)	-3	30.4	-9.5	1.3	10.5
14	Piraeus (EL)	+7	25.6	+12.5	1.1	14.6
15	Dover (UK)	+7	25.0	+10.6	1.1	0.3
16	Valencia (ES)	+3	24.3	+3.5	1.0	29.4
17	Tees & Hartlepool (UK)	-3	23.9	-8.3	1.0	13.7
18	Milford Haven (UK)	+12	23.8	+14.9	1.0	17.3
19	Augusta (IT)	-1	23.1	-1.5	1.0	1.2
20	Gdansk (PL)	+11	22.9	+13.3	1.0	4.4
<b>Total top 20</b>			<b>855.4</b>	<b>+0.2</b>	<b>36.1</b>	<b>665.9</b>
<b>Total EU-28 ports</b>			<b>2 371.9</b>	<b>-1.6</b>	<b>100.0</b>	<b>1 258.7</b>

✓ 1/3 of global shipping has an EU port as origin or destination\*

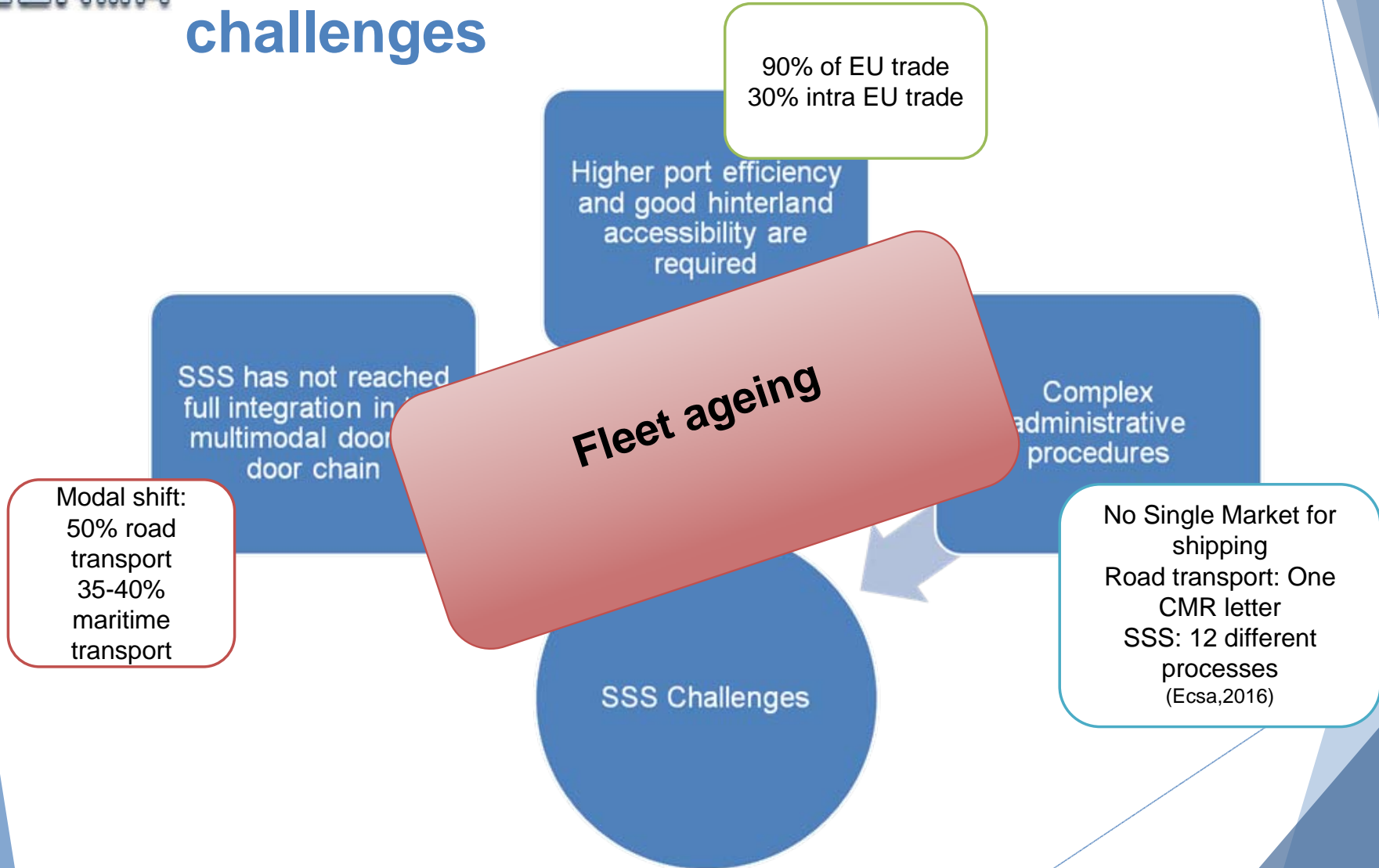
✓ Top 20 ports account for 36% of SSS goods in EU.

✓ Piraeus among the top 20 ports

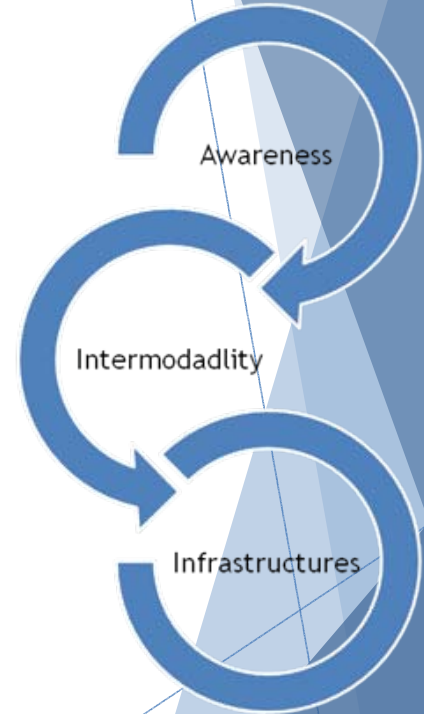
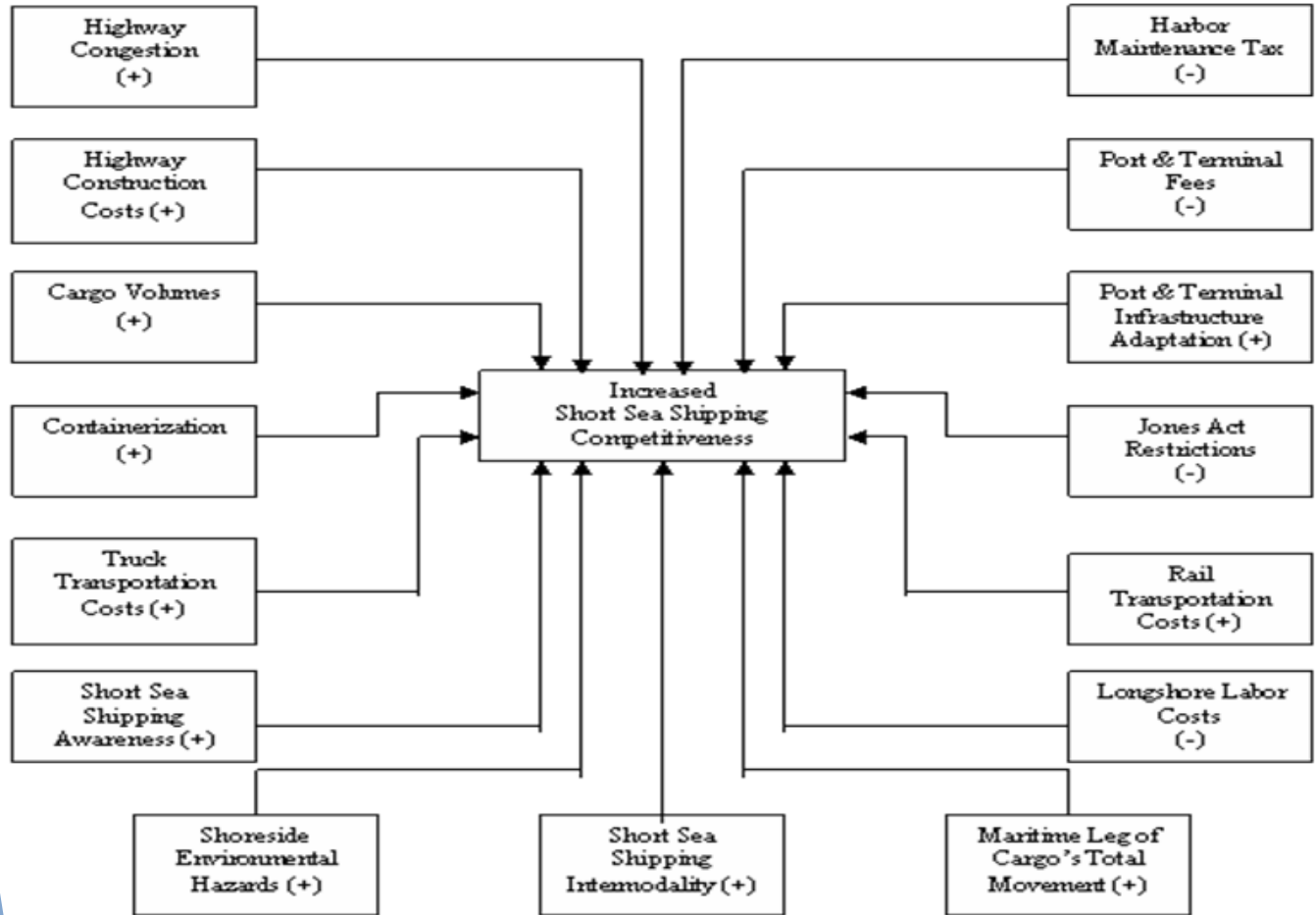
- 2013: 25,5 million tonnes (+12,5%)
- 2014: 28 million tonnes (+9,7%)



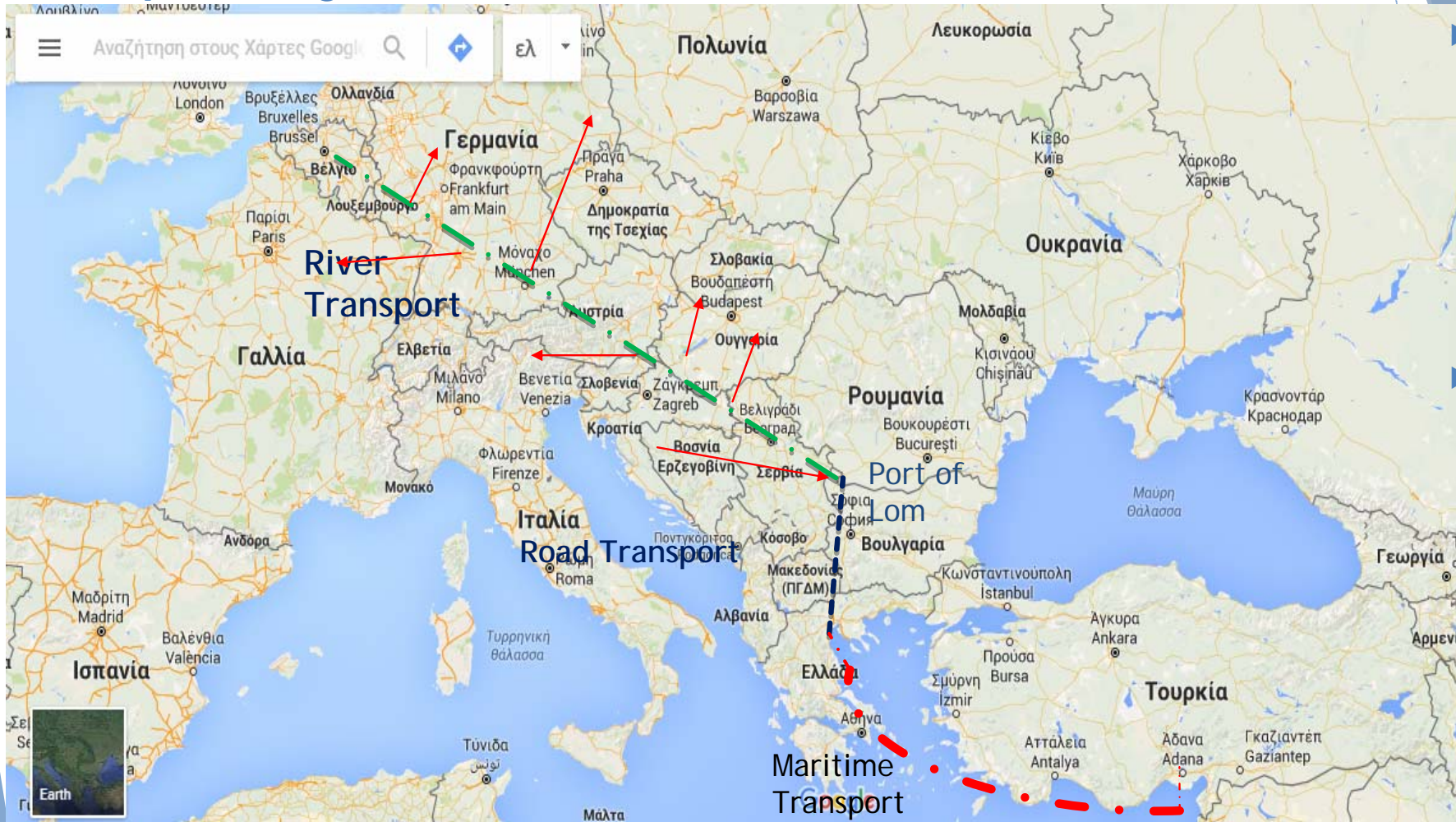
# SSS Contemporary challenges



# Shortsea Shipping Conceptual Model



# Lengthening the maritime leg of transport system



70% of European industrial production located within 150-200 km from sea (Paixiao and Marlow,2002)

205 million of people live coastal regions representing 41% of EU population

Main question is how to increase SSS share???



# EU Initiatives

## Ecobonus

Initiated in 2007 by the Italian government

Duration: 3 years

Budget: 240 million euros

Identity: *reimbursements of up to 30% of the costs sustained by road haulage companies that choose to use the Motorways of the Sea rather than roads and motorways*

Effects:

- 500 thousand TIR journeys removed from the road network
- 22,3% increase of MoS during 2007-2010
- Social costs reduction
- Financial liquidity to road haulage sector

# EU Initiatives

- ▶ Basque Country Ecobono

Initiated in 2008 by the Basque Government

Budget: 650 000 euros

Identity: *Up to the 30% of the ship fare depending on the number of trips done in a year*



# Zero Vision Tool- North Europe

- ▶ Background: *A maritime industry without negative impact on air and water*
- ▶ Initiated in 2011 by SSPA Sweden AB and the Swedish Shipowners Association
- ▶ ZVT is a collaboration method and project platform for a safer, more environmentally and energy efficient transport by sea
- ▶ All stakeholders: representatives of industry, academy, agencies and administrations
- ▶ 130 organizations from various countries

<http://www.zerovisiontool.com>



# EUROPA SHIP PLAN

- ▶ Background: fleet's ageing, limited access to funding, new environmental regulations
- ▶ Initiated in 2015 by the Hellenic Shortsea Shipowners Association
- ▶ Objective: to establish a sustainable financing mechanism for the renewal of the European Short Sea Shipping fleet open to all shipowners
- ▶ Core concept: standardization of the construction process of new ships and ships' equipment, along with the economies of scale that will incur as a result of a large-scale construction process.
- ▶ Status: finalizing technical characteristics of ships' design- Submitted to CEF



Thank you for your attention