

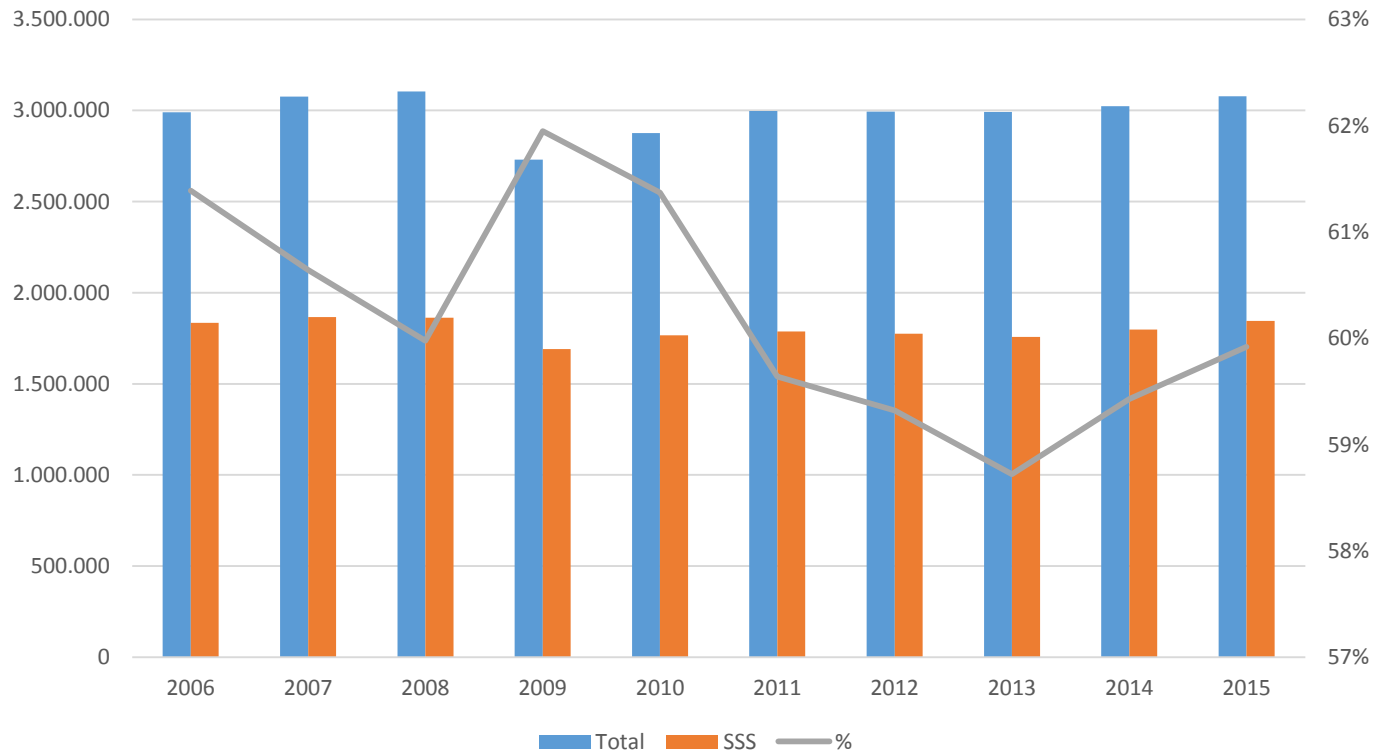


SHORTSEA SHIPPING MARKETS EAST AND WEST MEDITERRANEAN



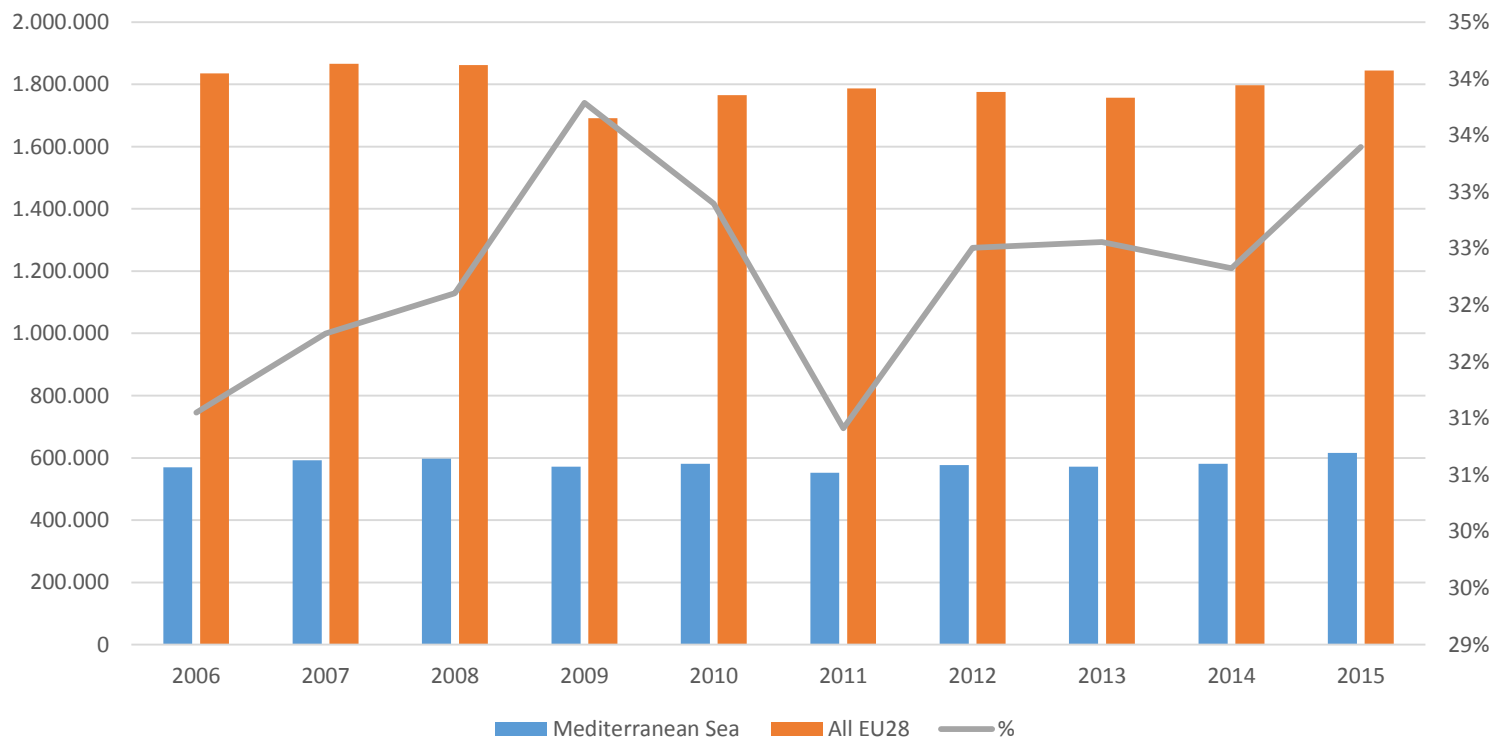
CARGO MEASURED IN TONNES. EU28

Short Sea Shipping - Country level - Gross weight of goods transported to/from main ports EU28



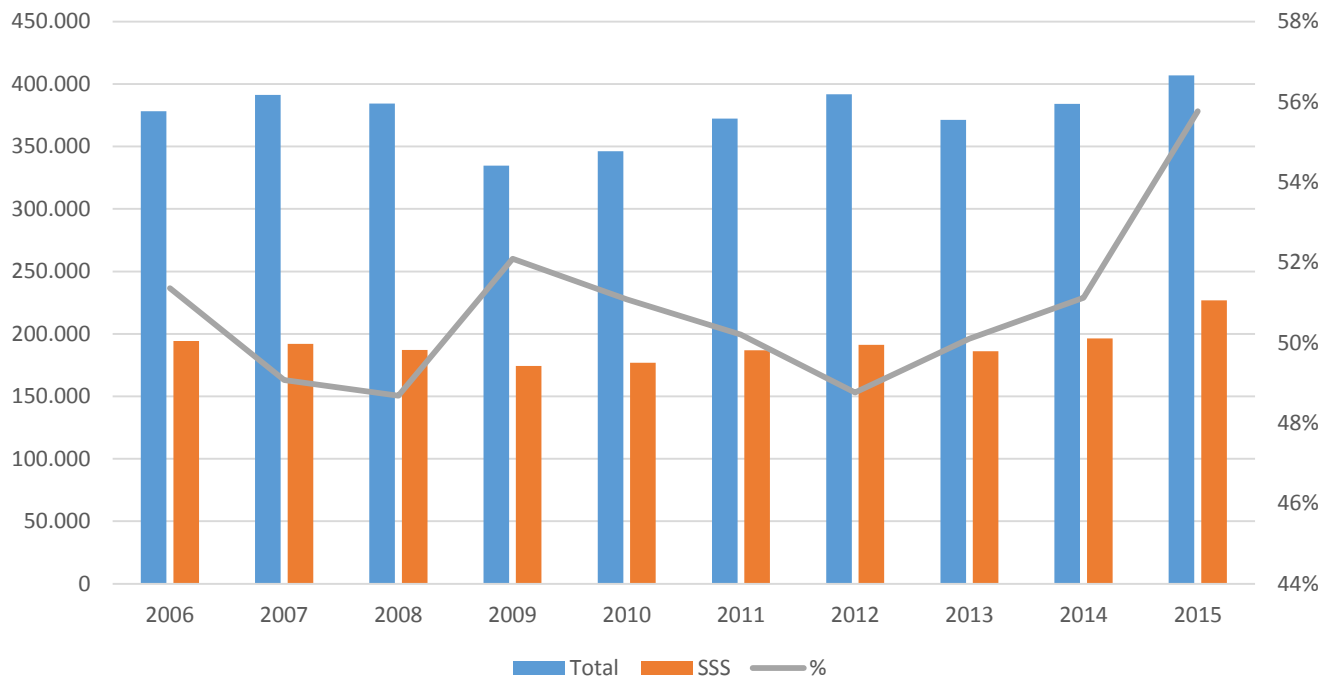
CARGO MEASURED IN TONNES. MEDITERRANEAN

Short Sea Shipping - Mediterranean- Gross weight of goods transported to/from main ports EU28



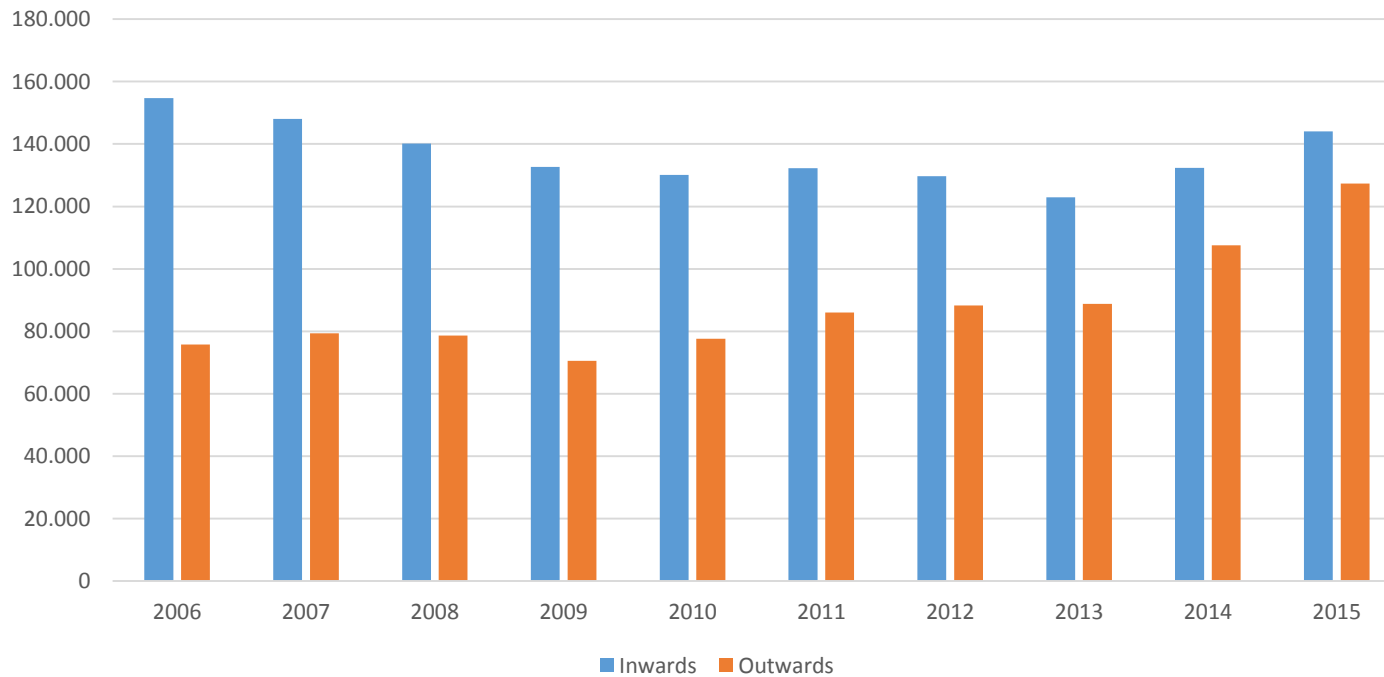
CARGO MEASURED IN TONNES. SPAIN

Short Sea Shipping - Spain- Gross weight of goods transported to/from main ports

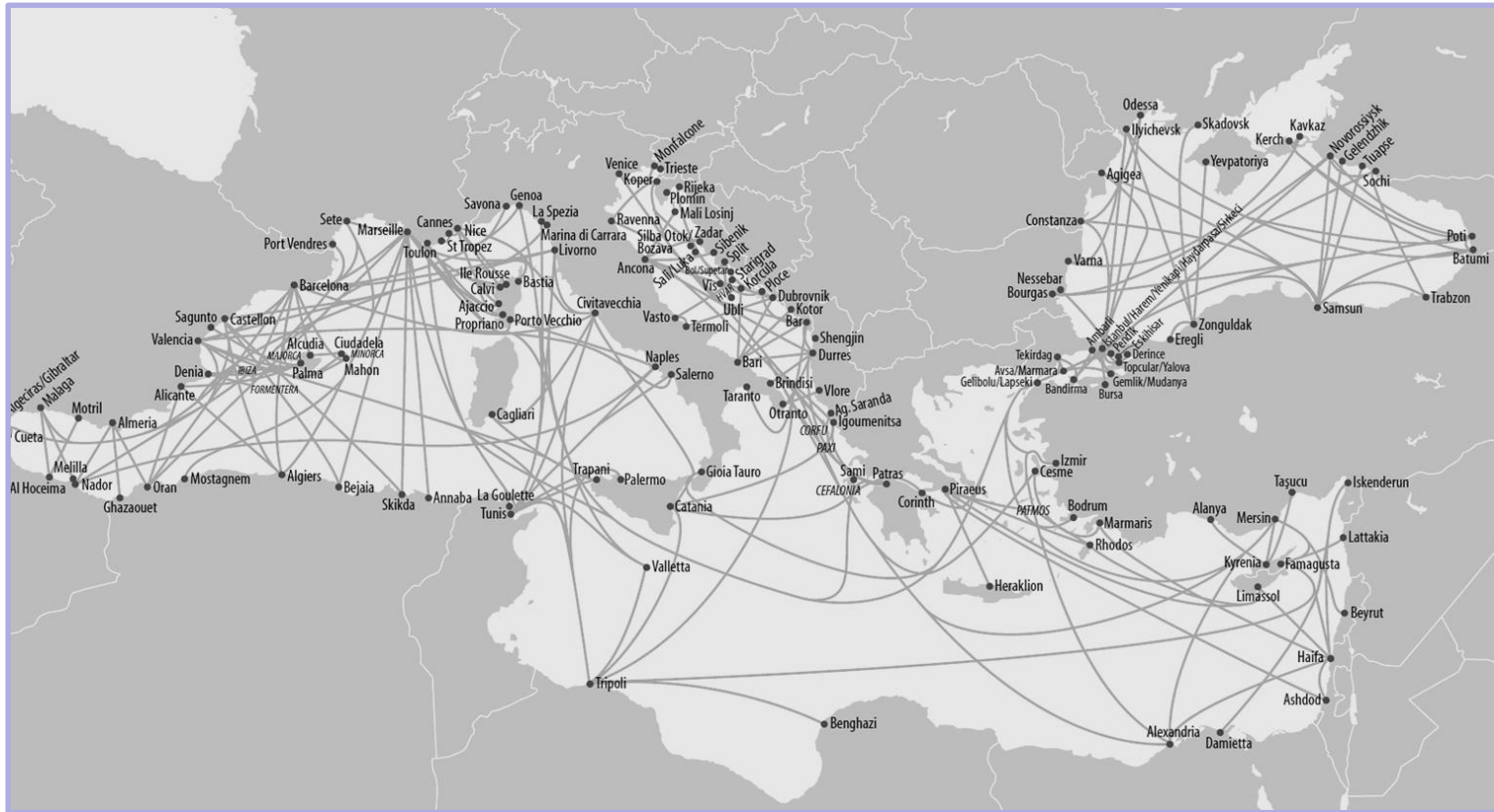


IMPORT VS EXPORT. SPAIN

Short Sea Shipping - Spain- Gross weight of goods transported to/from main ports
EU28



CURRENT RORO SERVICES IN MEDITERRANEAN



NORTH-SOUTH TRADES

- Focus has traditionally been on intra EU traffics. Nevertheless there are very important trades with non UE countries in the Mediterranean
- North-South services are strongly demanded by passengers, that may be the basis for new short sea services. Europe-Africa summer migration reached this year 2,8 million passengers only from Southern Spanish ports (1,9% increase from 2015)
- Automotive and textile industries are moving South, while most of the demand is still from Europe
- Agriculture is also another fast growing trade from South to North

SWOT ANALYSIS

STRENGTHS

- Cultural links, language, native population living in UE
- Passenger traffics help to achieve profit
- Small distance from many ports in Mediterranean

WEAKNESSES

- Custom requirements in UE for Intra european traffics collide with no Schengen traffics
- Traffic congestion in North Africa facilities for roro cargo , and procedures and customs better prepared for container traffics

OPPORTUNITIES

- Market with strong growth; a big difference in wealth increase trade
- South –South trades will increase in the following years.

THREATS

- Political instability of most countries
- Legal framework not clear and/or stable
- Terrorism and illegal inmigration