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THE ROLE OF THE MEDITERRANEAN PORTS IN THE EUROPEAN TRAFFIC MARKET

ULOGA LUKA MEDITERANA NA PROMETNOM TRŽIŠTU EUROPE

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Pregledni rad
Review

Summary

The trends in the development of the maritime traffic show us that the need for bigger container shipments is increasing steadily. At present there are quite a few big container ports being constructed in the Mediterranean which are bound to come in handy for the container ships of the last generation.

Thus the Mediterranean will not remain merely a transit sea, but will become interesting for those ships too, which have only passed through it on their way to the west-European ports.

Povzetek

Trendi v razvoju pomorskega prometa kažejo na potrebo po prevozu vedno večjega števila kontejnerjev. V Mediteranu se danes gradi kar nekaj velikih kontejnerskih luk, ki bodo zanimive za kontejnerske ladje zadnjih generacij.

Tako Mediteran ne bo več le tranzitno morje, temveč bo postal zanimiv tudi za ladje, ki so ga danes na poti v zahodnoevropske luke le prevozile.

Sažetak

Trendovi u razvoju pomorskog prometa pokazuju nam da potreba za većim kontejnerskim pošiljkama stalno raste. Sada postoji više velikih kontejnerskih luka koje se grade na Mediteranu, a koje će postati prikladne za kontejnerske brodove nove generacije.

Time Mediteran neće ostati samo tranzitno more nego će postati zanimljivo onim brodovima koji prođu kroz njega na svom putu u sjevernoeuropske luke.

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1. Introduction
Uvod

Ports tend to be a very important segment of the sea-evaluation and the maritime orientation of individual countries, therefore special attention of these maritime countries is put in the development of their ports. They represent an enormous economic power and are thus of great importance to the global as well as to the domestic economy. The basic role and the importance of the port's existence is connecting the maritime with the land transport.

The development of the ports depends on the geographical position and the economic power of its hinterland, on the developed sea and land connections, on technical equipment of ports, on how the management is organised, on the rates and the rate policy etc.

The port's services user is interested mainly in the quick and quality service, good connections with the hinterland and, of course, the price of all the services.

The role of the port, the management policy and the development of the portal system is determined by the state with the decrees of the portal state policy and by the port itself, i.e. its port managers with their decisions. For a port to do good business it is vital to co-ordinate and connect moves of all those involved in the process of transport.

2. Transport currents in Europe
Transportni putevi u Evropi

The European transport streams have been traditionally bound to two transport ways which are changing along the lines of the new Europe. In the period of the economi-cally and politically split Europe these goods currents have been practically broken. In west-Europe the main goods currents are concentrated on the Atlantic coast, in the east-Europe on the Black Sea coast. In such circumstances only a minor share of these currents ventured elsewhere, leaving the ports of the north-Mediterranean to suffer most by the Iron Curtain.

As a result the imperative was to build great ports on the Atlantic coast from Rotterdam to Hamburg. In contrast to that, the Mediterranean ports did not have that kind of hinterland to which they could gravitate and thus compete with the western ports.

In last years we have been witnessing great changes in the ports, which is all due to the powerful will of politics (mainly coming from Brussels) and to the market demands. There is also a noticeable difference between the southern and the northern ports, for the southern ones have only just begun with the process of privatisation which is something already completed in the north.

In the period between 1985 to 1995 the European transport market has experienced an increase in container transport to 30 Million TEU, a threefold increase in container transport to 6,3 M. TEU, whereas the European transport-Euro-domestic-has been struggling to reach 7 M. TEU. Today the joint percentage of the European ports makes 21,3 % of the global container transport.

Between 1985 and 1995 the container turnover in the north-European ports has increased from 5 to 13 M. TEU, in the west-Mediterranean ports from 1,7 to 6 M TEU. In 1997 the joint turnover of thirteen north-European ports is estimated to 15 M TEU, whereas in 33 Mediterranean ports this number is not to reach even one half of the whole northern European turnover, so merely 7 M TEU are expected.

3. North-European ports
Sjevernoeuropske luke

In the northern part of Europe on a relatively short piece of the Atlantic coast there are four great container ports of Antwerp, Rotterdam, Bremerhaven and Hamburg.

It is typical of the northern European ports to have an economically quite a developed background which they share among themselves. It is the business policy of an individual port that is of significant importance in such a competitive environment, other important factors are, e.g. the prices of its services and the quality and speed with which the services are done.

Table 1. Container transport in the northern European ports in TEU
Tablica 1. Kontejnerski transport u sjeverno-europskim lukama u TEU

Port	1994	1995	2000
Rotterdam	4.539,000	4.789,000	6.950,000
Hamburg	2.727,718	2.900,000	4.200,000
Antwerp	2.208,173	2.339,559	3.500,000
Bremerhaven	1.502,286	1.532,000	2.100,000

Source: Cargo system, Dec. 1996

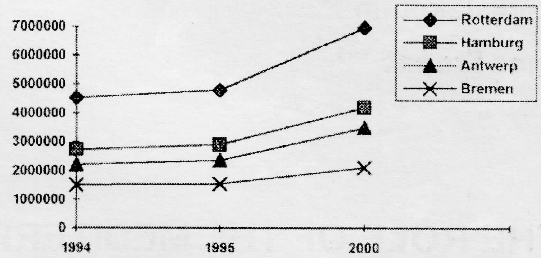

Chart 1. Container transport in the northern European ports in TEU
Grafikon 1. Kontejnerski transport u Sjevernoeuropskim lukama u TEU

The biggest advantage in such conditions has proved to have the port of Rotterdam which is technologically best equipped and can accept even the biggest container ships on the one hand, on the other hand it has proved to have the best road and railway connections with the industrial centres of Europe.

The biggest European port of Rotterdam ranks with its nearly 4,8 TEU fourth on the world chart o the container ports. The second biggest in Europe is the port of Hamburg, ranking sixth, Antwerp ranks tenth and Bremerhaven ranks eighteenth.

In the port of Rotterdam the constructing of the eighth terminal Delta 2000-8 in progress which is due to be finished in 1999; in 2000 an estimated turnover of 6,5 M. TEU is expected, therefore they are speeding up the constructing of the road and railway connections with the inland Europe, with a stress on the connections toward eastern Europe, where a major increase in turnover is expected.

By means of modernising their container terminals the other north-European ports too aim at a bigger turnover. The planned joint container turnover is to be increased from 14 TEU in 1995 to 18 TEU in 2000 and to 35 TEU in 2010.

4. The Mediterranean ports
Mediteranske luke

The difference between the west-European and the Mediterranean ports is in the fact that whereas the north-European ports have a great cargo potential (almost 15 M. TEU), the Mediterranean ports possess a far smaller potential (almost 7 M. TEU in 33 ports).

Table 2. Container transport in the Mediterranean ports in TEU

Tablica 2. Kontejnerski transport u mediteranskim lukama u TEU

Port	1994	1995
Algericas	1.004,000	1.180,000
La Spezia	816,000	1.067,000
Barcelona	523,000	685,000
Valencia	467,000	685,000
Genova	512,000	591,000
Marseille	437,000	500,000

Source: Cargo system, Dec. 1996

There are a number of ports in the Mediterranean which would like to become the main ports in the feeder system, but this chance will be given only to those which will meet certain demands. The port's geographical position will be of great importance to the choosers of the "hub" port for transhipment.

The port has to be situated on such a position that will represent the minimal deviation from the original route and this condition is in the Mediterranean met only by the axis Gibraltar - the Suez canal; what also brings great importance are the maritime connections of the main feeder port with small ports with which it would maintain regular lines on a weekly basis. The most successful hub ports of the world pursue only feeder transport, making their own cargo just a very small fraction of the business.

Morever, such ports must be very well organized, since a quick overloading of cargo is what is important here and not only the low and competitive prices.

Spain has an excellent geographic position, for it extends over a large part of the Mediterranean coast from Gibraltar all the way to the French coast, which demanded the building of several ports, the most important of them being those of Algeciras, Barcelona and Valencia.

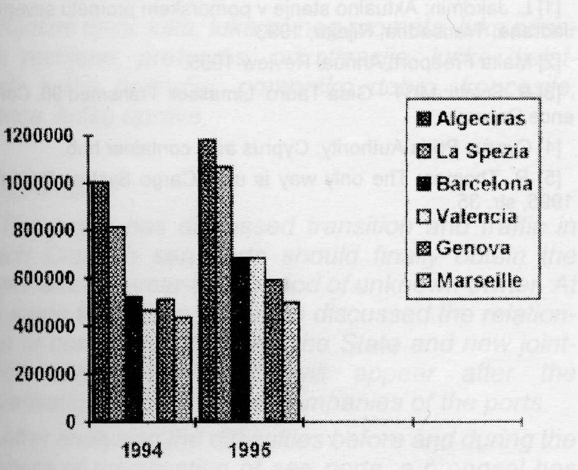

Chart 2. Container transport in the Mediterranean ports in TEU

Grafikon 2. Kontejnerski transport u mediteranskim lukama u TEU

Algeciras was in 1994 the first Mediterranean port to reach 1 Million TEU yearly. Since then, the port has ordered another six post panamax cages and thus increased its transhipment potential, until the year 2000 they plan to reach 2 Million TEU of transhipments.

The second great Spanish port is Barcelona which together with its new container terminal of the capacity of 800.000 TEU reaches an efficiency of 1,3 Million TEU. Its domestic competitor is the port of Valencia with which it has quite a few things in common, e.g. : both ports have built new container terminals, both have good railway connections with the hinterland and both want to become the leading Spanish transhipment port. The port of Valencia is building a new container terminal of the capacity of 1 Million TEU and it is due to open for business at the beginning of 1998.

The port of Marseille is witnessing the existent terminal being modernised by adding new post panamax cages. This French port counts on a yearly increase of the container turnover for 14 %. It is mainly the import/export goods from France and not so much the transhipment cargo.

The Italian ports have greatly modernised in the last few years and have equipped themselves well for the transhipment of containers. Currently the largest port is that of La Spezia which was already in 1994 the second Mediterranean port with 820.000 TEU, its plans until 1998 are to overcome the magic number of 1.000.000 TEU of transhipments. The Italian runner-up is Genova which with its container terminal represents the major Italian import/export port, for it is backed by two of the highest industrialised regions -the regions of Turin and Milan.

More to the south there lie the ports of Neaples and Salerno with a steady container transport growth.

Gioa Tauro is the second biggest container port of the Mediterranean. In the Gioa Tauro Container Terminal (MCT) there were 570.000 TEU of cargo transhipped in 1996. This year a huge increase in turnover is expected, for 1,1 Million of transhipments are planned, since only in the last six months of the current year 510.00 TEU of cargo has passed through this terminal and 96 % of the whole turnover was bound for transhipment.

The port of Malta - Marsaxlokk - is the biggest Mediterranean port of today which does transhipping, for it represents 90 % of its turnover. Its constant increase has reached climax in 1995, when goods at the rate around 42.000 TEU have been transhipped monthly, which at a yearly rate brings the entire turnover to over 500.000 TEU. This is not far from the maximum, since the capacity of terminal One is 600.000 TEU, which is exactly why the constructing of terminal Two, where ships with a cargo capacity of up to 6.000 TEU could drop anchor, has been started. The construction work is due to be finished in 1998, which will higher the port's capacity to 1,200.000 TEU.

The biggest port of the eastern Mediterranean is the port of Limasol on Cyprus with a modern container terminal. Together with the port of Larnaka it has a capacity of 600.000 TEU, yet the West Container Terminal Larnaka plans to expand its capacities until

2010 and thus reach the capacity of 1,000.000 TEU yearly.

Among the Greek ports the port of Piraeus ranks top. Some 650.000 TEU have been transhipped there in 1996. By constructing a new terminal, due to be put in practice by the year 1999, yearly capacity of 1,5 Million TEU will be reached.

In the following years the Mediterranean is bound to experience an increase in turnover from 6 Million TEU in 1995 to 8 Million TEU in 2000 and to 14 Million TEU in 2010.

5. Conclusion
Zaključak

In the next years competition between the northern European and the Mediterranean ports is bound to increase. Their technological equipment is surely to improve and they will thus be ready to accept container ships of the last generation. In such conditions it is the equipment of the ports that is going to play an extremely important role in the future.

Container transport in the European ports will increase until the year 2000 mainly due to the more intense business with the Asian economies (up for 8 %), due to the more intense business with the USA (up for 5 %) and due to the feeder-transhipment turnover (up for 7 %). The increase of the turnover can therefore be more realistically estimated in the west-European and in the Mediterranean ports.

Due to the tendency of increased turnover it can't be reasonably expected that there will be only one main hub port in western Europe and one in the Mediterranean. Probably there will be some ports which will specialise in transhipment, meaning that the feeder system will have to develop more, mostly with the shipments of the domestic - European - goods. Thus small ports will be in position to play an important role, for they will be in constant connection with the main feeder port of the region.

The capacity of container ships has increased immensely, but not only the ship's capacity has increased, there are also the costs that have increased, yet not to such extent that would make the ship unprofitable. The rise in the container shipment costs is a result of the port, i.e. its services. Insufficient port equipment results in the delaying of ships, therefore it can be said that there are two ways in which a port can influence the costs to rise: directly, by the prices of its services, as well as in-directly, by the time a ship wastes on waiting (the so called turn-round-time), measured in days and hours. Huge ships with capacities of 5000 -6000 TEU demands quick service, since it is only profitable when it is at sea and each hour spent waiting means money has been lost.

For the ports this means that beside the sufficient sea depth in docks (14 - 16 metres) they have to have enough deposit space for containers and, of course, post panamax cages with which they can stretch along the entire ship's width. Apart from good equipment and well organised management ports will have to have good connections with their background, for the European market is (seen from a geographic point) too small and therefore shared by the north-European and the Mediterranean ports, which holds true especially for Central Europe, central France, Switzerland and Austria.

It is certain that the competition between the ports will continue in the future and that it will probably escalate on all levels, be it local, regional or even international.

In the future Europe is certain to need big container ships which will have to be well connected with small container ports with feeder ships. In the Europe's inland modern railway and road infrastructure will have to be built to meet the demands for quicker and safer transport of goods from the continent's inland to the ports and vice versa.

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