

Movimentazione portuale di contenitori

**Modelli di sviluppo, concentrazione, competizione
tra i range europei nel periodo 1972-2002**

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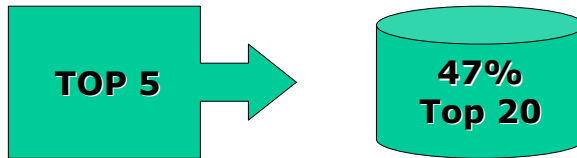
SIET - VII Riunione Scientifica
Genova, 18-20 Novembre 2004

Tendenze del contesto

- Forte concentrazione nel settore del trasporto di linea
- Forte concentrazione nell'industria terminalistica

Il trasporto di linea di container

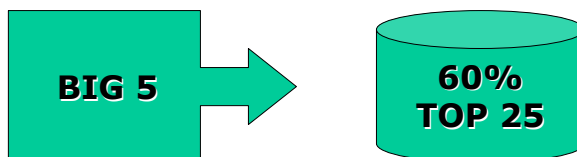
Containerisation International, Nov. 2004:



AP Moeller	900.509
MSC	618.025
Evergreen	437.618
P&O Nedlloyd	426.996
CMA CGM	373.191

L'industria terminalistica

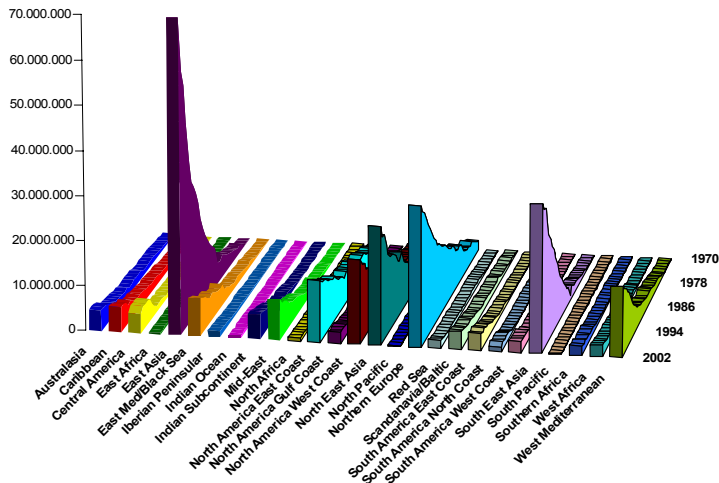
Drewry, Global Container Terminal Operators, 2004



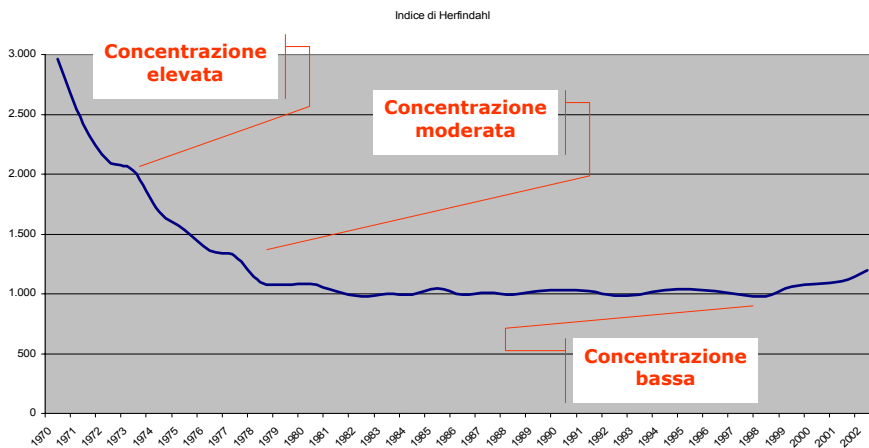
HPH	48,9
PSA	37,2
APM Terminals	24,4
P&O Ports	21,5
Eurogate	12,9

Million
Teu

Crescita del traffico container



La concentrazione nei porti del mondo



Quali le tendenze nei porti europei



Database utilizzato

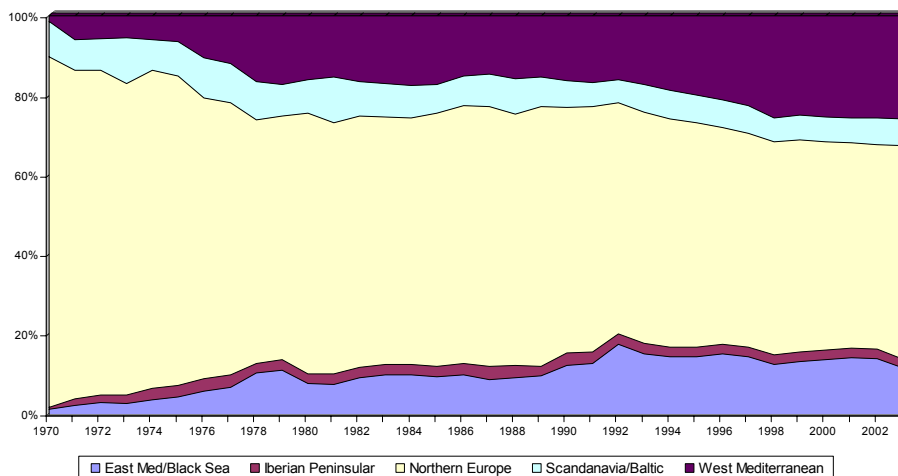
Containerisation International

Anni: 1970-2003

Oltre 400 porti nel mondo

di cui 120 europei

Il mercato europeo



La composizione dei range portuali

East Med / Black Sea		
1	Alexandria	17
2	Armaport	18
3	Ashdod	19
4	Beirut	20
5	Borusan	21
6	Constanza	22
7	Damietta	23
8	Eilat	24
9	Gemlik	25
10	Haifa	26
11	Haydarpasa	27
12	Ilyichevsk	28
13	Izmir	29
14	Koper	30
15	Kumport	31
16	Lamacca	
	Lattakia	
	Limassol	
	Mardas	
	Mersin	
	Odessa	
	Piraeus	
	Port Said	
	Ravenna	
	Rijeka	
	Sedefport	
	Taranto	
	Thessaloniki	
	Trieste	
	Varna	
	Venice	

Iberian Peninsular		
1	Bilbao	3
2	Leixoes	4
	Lisbon	
	Vigo	

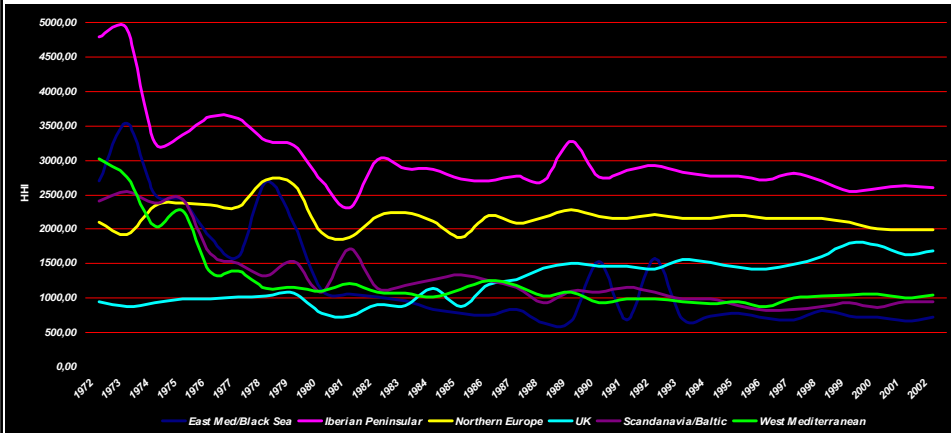
United Kingdom		
1	Belfast	16
2	Boston	17
3	Clydeport	18
4	Cork	19
5	Dartford	20
6	Drogheda	21
7	Dublin	22
8	Ellesmere Port	23
9	Felixstowe	24
10	Garston	25
11	Goole	26
12	Grangemouth	27
13	Greenore	28
14	Grimby	29
15	Harwich	30
	Holyhead	
	Hull	
	Immingham	
	Ipswich	
	Lame	
	Liverpool	
	Portsmouth	
	Purfleet	
	Southampton	
	Teesport	
	Thamesport	
	Tilbury	
	Tyne	
	Warrenpoint	
	Waterford	

Northern Europe		
1	Amsterdam	8
2	Antwerp	9
3	Bordeaux	10
4	Bremen/Brem.	11
5	Dunkirk	12
6	Emden	13
7	Hamburg	14
	Le Havre	
	Nantes	
	Reykjavik	
	Rotterdam	
	Rouen	
	Viissingen	
	Zeebrugge	

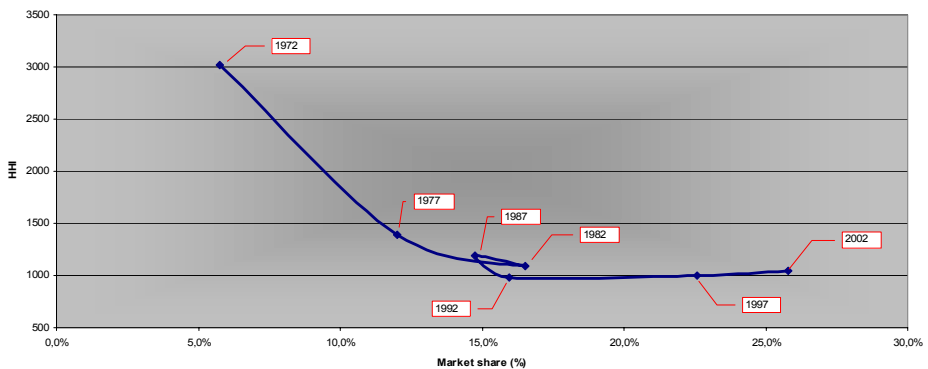
West Mediterranean		
1	Algeciras	12
2	Alicante	13
3	Barcelona	14
4	Cadiz	15
5	Cartagena	16
6	Fos	17
7	Genoa	18
8	Gioia Tauro	19
9	La Spezia	20
10	Leghorn	21
11	Marsaxlokk	
	Marseilles	
	Naples	
	Palermo	
	Palma de Mal.	
	Salerno	
	Savona	
	Seville	
	Tarragona	
	Valencia	
	Valletta	

Scandinavia/Baltic		
1	Aarhus	11
2	Copenhagen	12
3	Esbjerg	13
4	Gdynia	14
5	Gothenburg	15
6	Hamina	16
7	Helsingborg	17
8	Helsinki	18
9	Kiel	19
10	Klaipeda	20
	Kotka	
	Lubeck	
	Mantyluoto	
	Oslo	
	Rauma	
	Riga	
	Rostock	
	St Petersburg	
	Tallinn	
	Wallhamn	

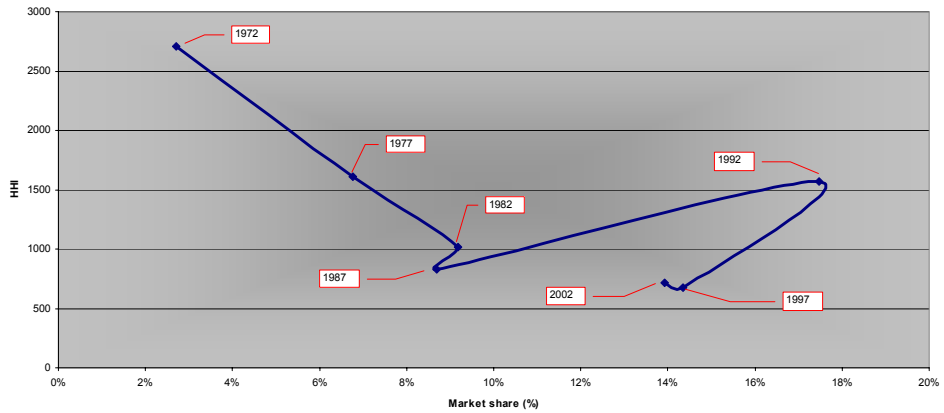
La concentrazione del traffico portuale



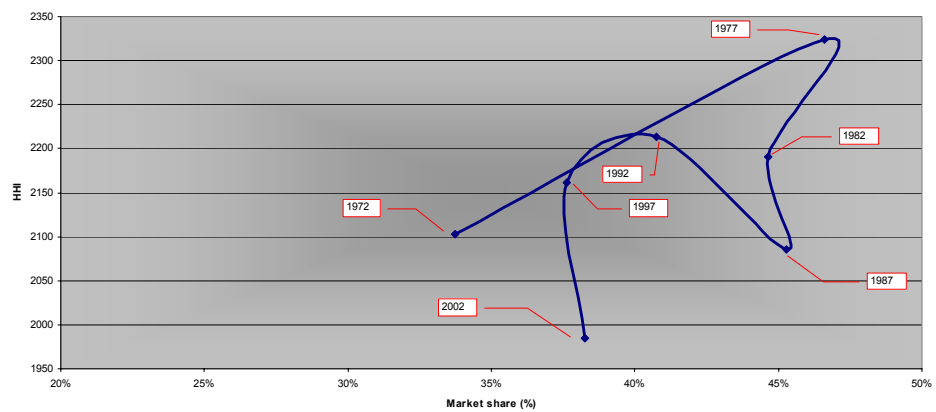
West Mediterranean



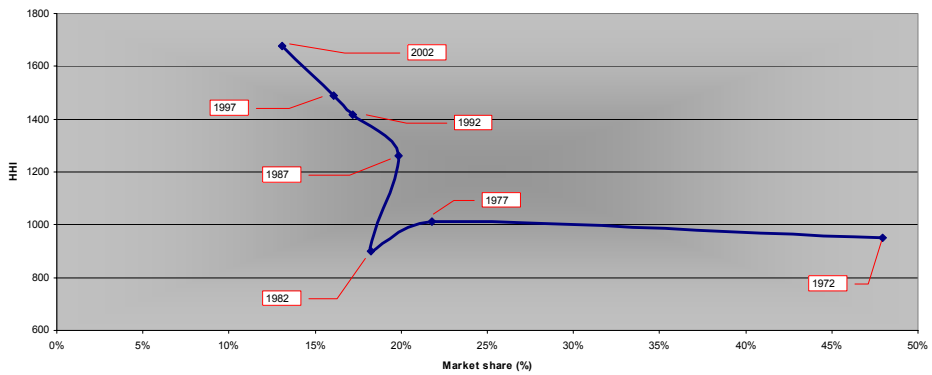
East Mediterranean / Black Sea



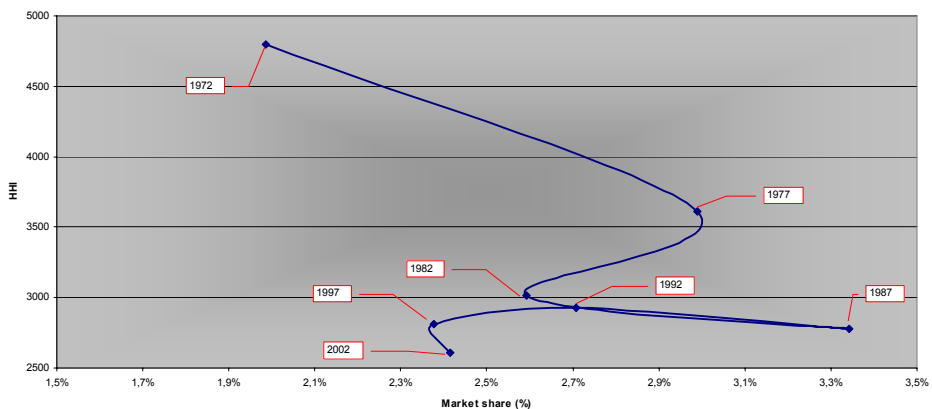
Northern Europe



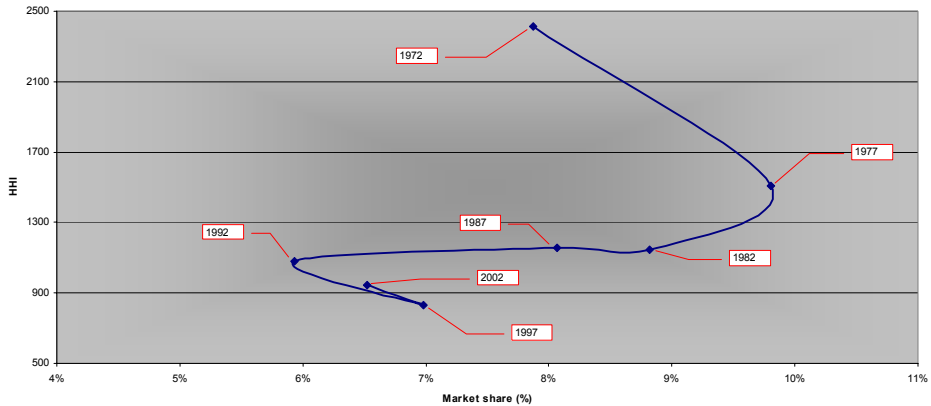
United Kingdom



Iberian Peninsular



Scandinavia / Baltic

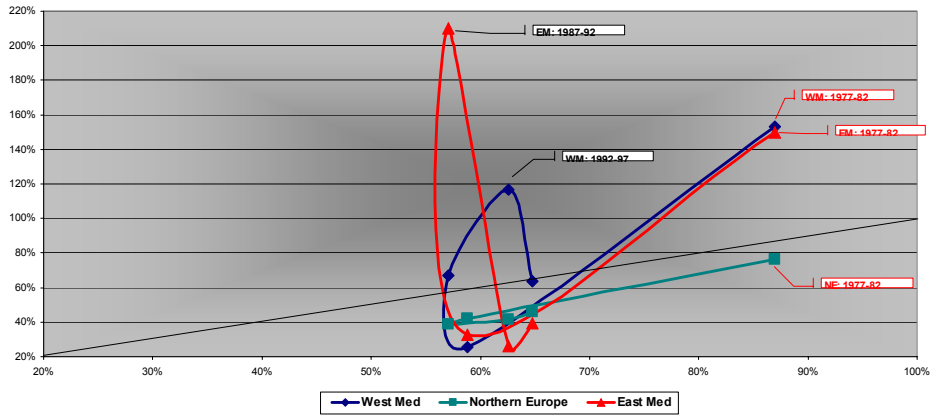


Chi ha guidato la crescita?

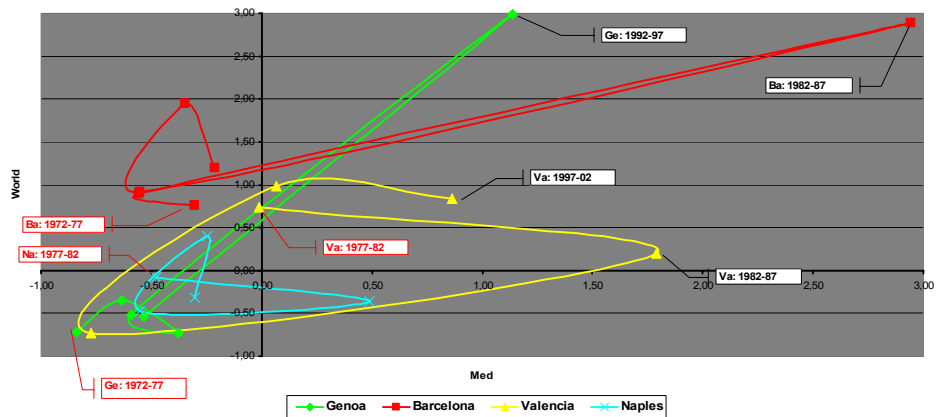
Escludendo i porti dediti esclusivamente al transhipment (Gioia Tauro, Algeciras, Malta, Pireo) quali sono i porti che hanno guidato nel tempo la crescita del throughput portuale?

I grafici che seguono mostrano la crescita relativa dei principali porti comparata con il tasso di crescita del range in cui il porto è inserito e con la crescita complessiva dei porti mondiali

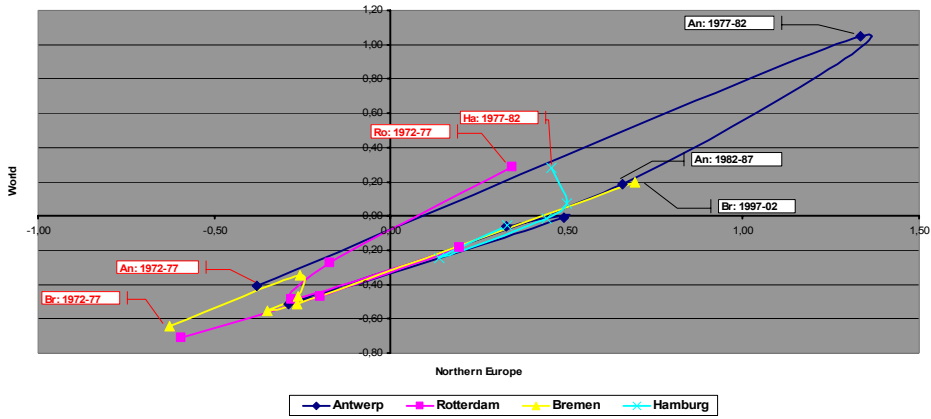
Range europei



West Med



Northern Europe



East Mediterranean

