

PORT INFRASTRUCTURE IN THE ADRIATIC-IONIC AREA



CRETE,
7th MAY 2025

Antonello Fontanili
Director of Uniontrasporti



PROGRAMMA
INFRASTRUTTURE



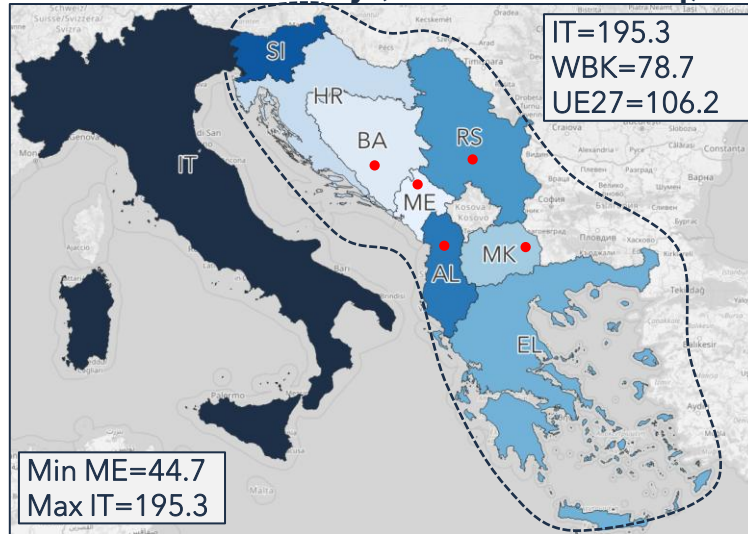
CAMERA DI COMMERCIO
DELLE MARCHE



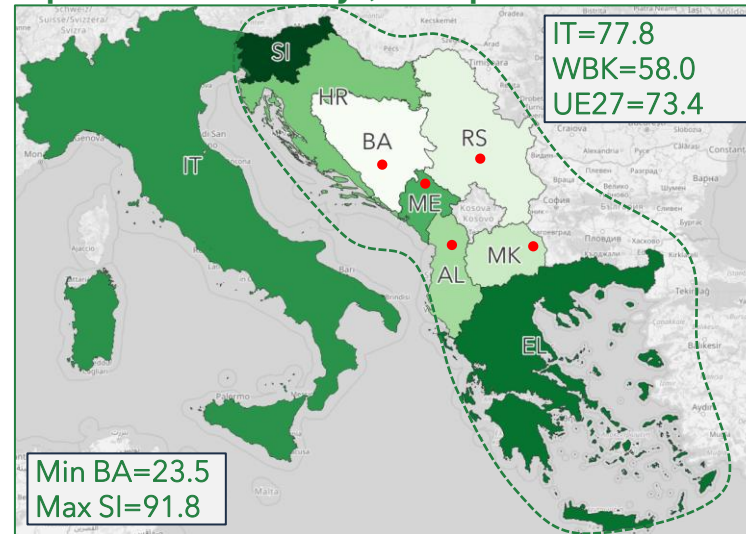
UNIONTRASPORTI

KEY FIGURES OF THE ADRIATIC-IONIAN COUNTRIES

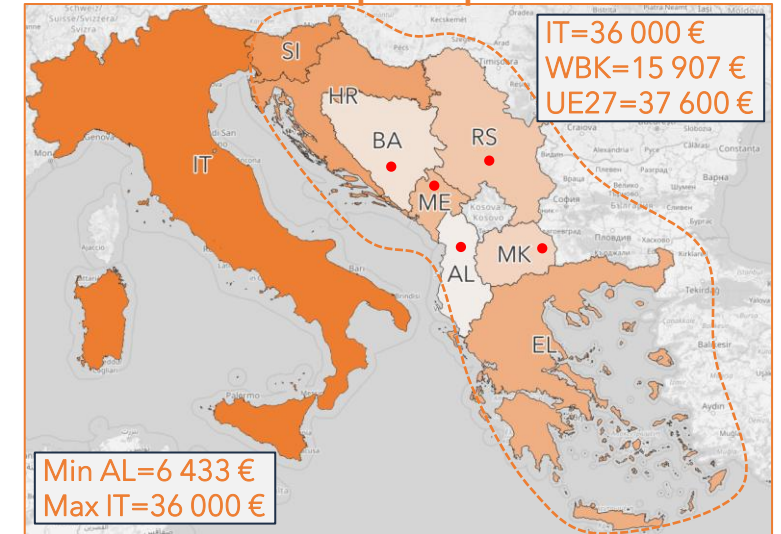
Population density (1000 inhab./kmq)



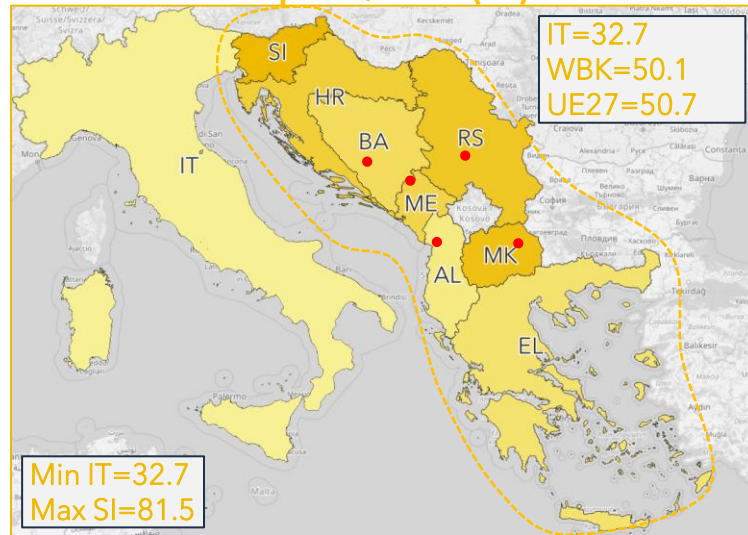
Entrepreneurial density (enterprises /1000 inhab.)



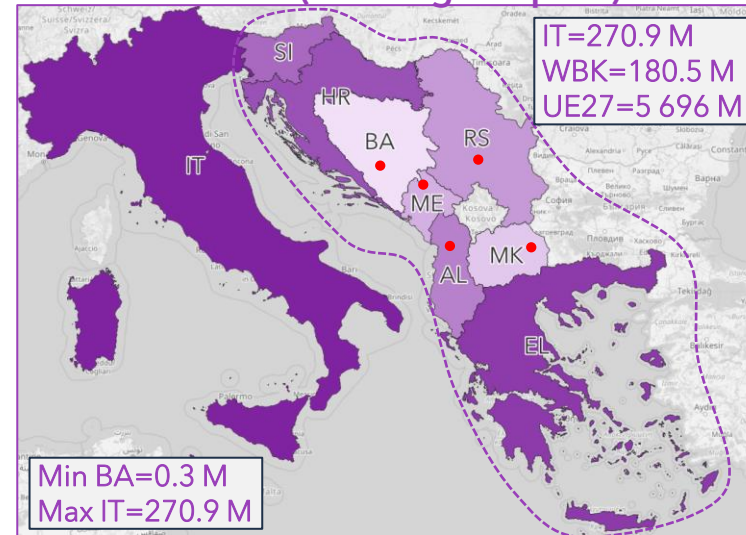
GDP per capita



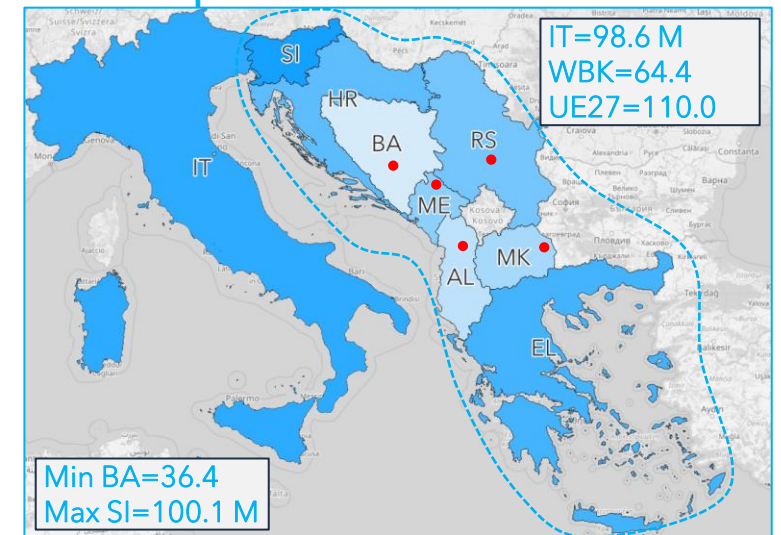
Exports/GDP (%)



Tourism (total nights spent)












European Innovation Scoreboard



KEY FIGURES OF THE ADRIATIC-IONIAN COUNTRIES

Min value - Max value

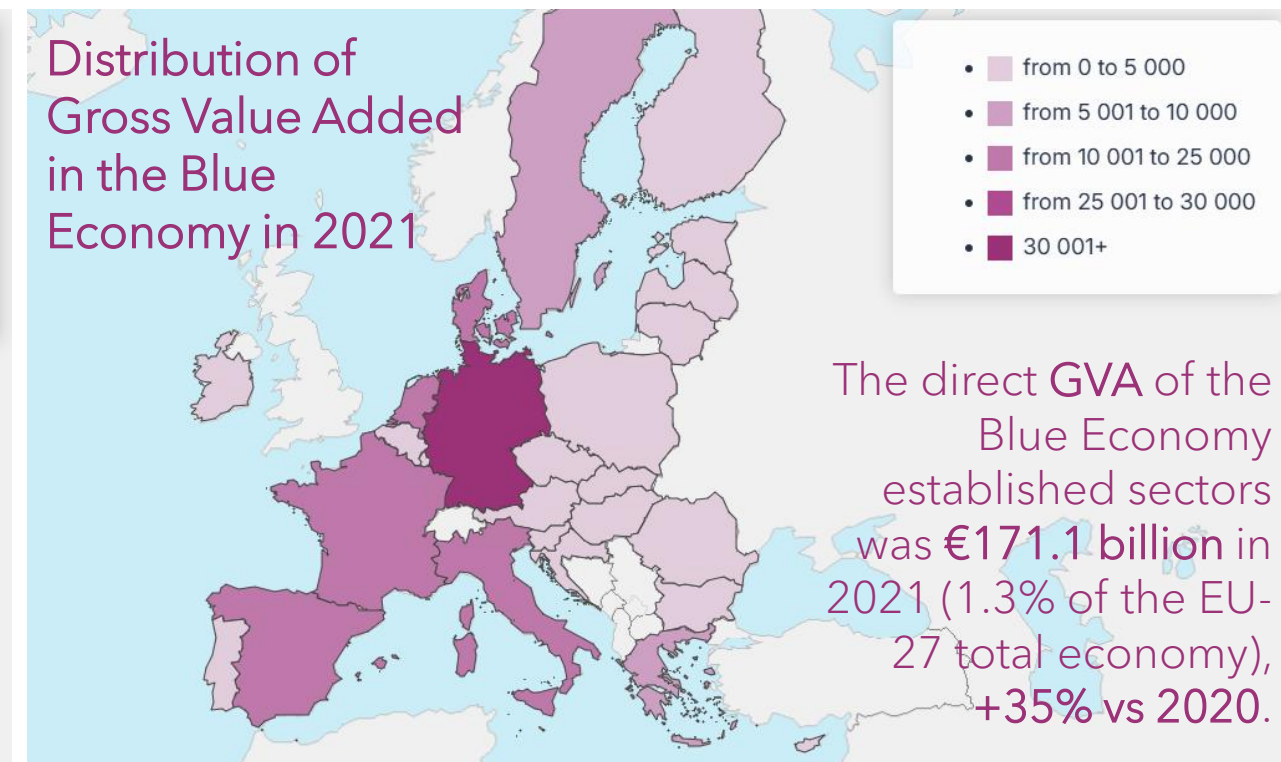
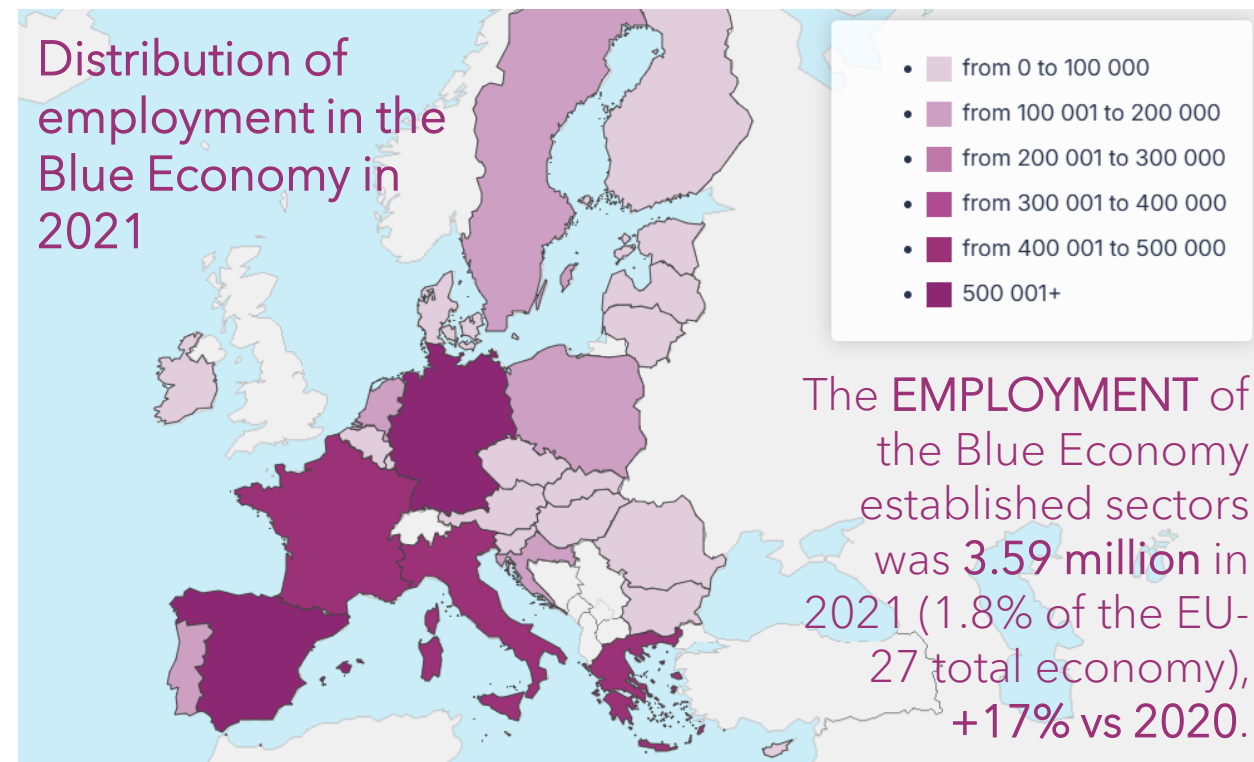
COUNTRY	Population (thousands people) - 2023	Population Density (persons per square kilometre) - 2023	Active Enterprises (number) -2022	GDP per capita (Euros) - 2022	Total exports of goods and services (million euro) -2024	Exports / GDP (%) -2024	European Innovation Scoreboard (EU27 2017=100) - 2024	Tourism (total nights spent) - 2023
• MK 	1 837	72.2	67 338	7 021	9 668	➔ 62.7	49.6	2 413 243
• AL 	2 794	97.0	113 460	6 433	9 072	36.1	46.0	29 277 919
• ME 	618	➔ 44.7	43 313	9 600	3 347	44.9	52.3	7 658 249
• RS 	6 797	87.7	205 316	9 070	43 377	➔ 52.7	69.1	11 401 680
• BA 	3 464	67.6	81 436	6 733	11 217	42.8	36.4	333 294
EL 	10 397	78.9	917 441	25 300	99 732	42.0	85.3	65 958 482
HR 	3 862	68.2	227 408	28 700	42 570	49.8	76.6	32 428 371
SI 	2 124	104.8	194 940	34 400	54 602	➔ 81.5	➔ 100.1	30 976 394
WBK	31 893	78.7	1 850 652	15 907*	273 584	50.1	64.4*	180 447 632
IT 	58 990	➔ 195.3	4 587 208	36 000	717 564	32.7	➔ 98.6	270 943 288
WBK + IT	90 883	128.5	6 437 860	18 140*	991 148	36.2	68.2*	451 390 920
EU27	449 606	106.2	33 000 000	37 600	9 099 730	50.7	110.0	5 695 618 377

* Mean value • UE Accession negotiations currently ongoing

Source: elaboration of Uniontrasporti on data from Eurostat and European Commission

Note: the last available data has been considered in each Country, but some misalignments exists among official statistics. The represented data can be then considered as a rough snapshot of the area and relative weight of each included Country.

BLUE ECONOMY VALUE EU MEMBER STATES



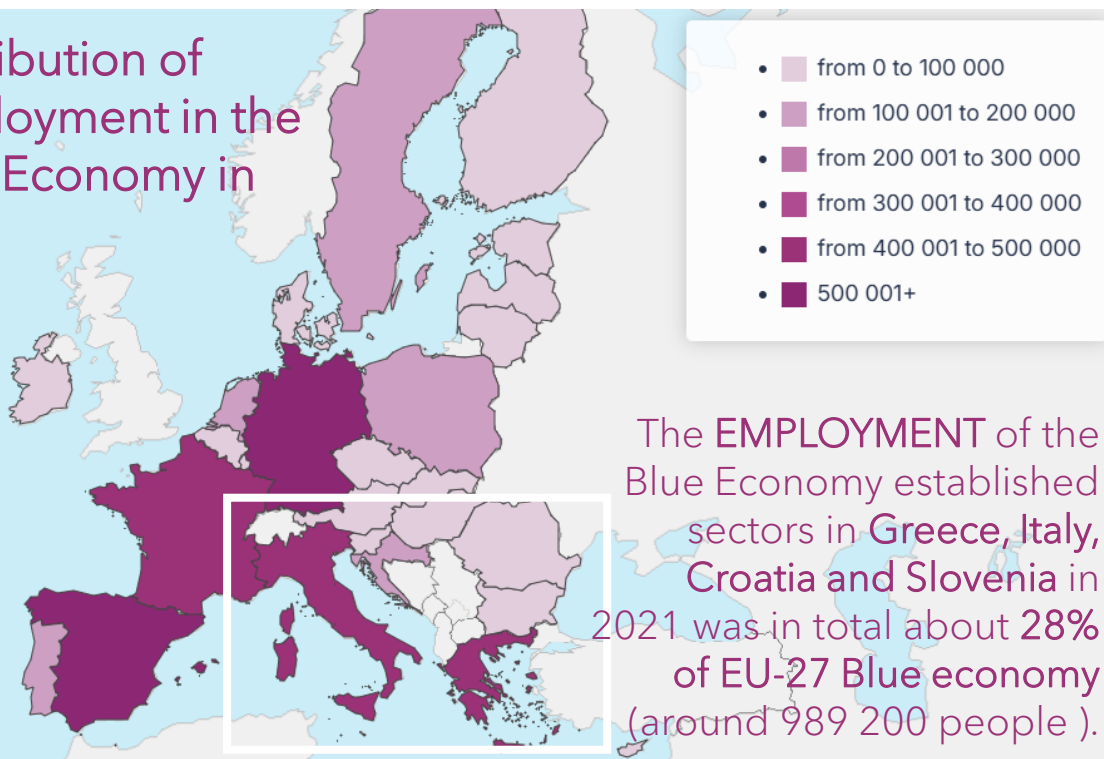
EU Blue Economy includes all sectoral and cross-sectoral economic activities based on or related to the oceans, seas and coasts (Marine-based activities and Marine-related activities): **Marine living resources** (Primary production, Processing of fish products, Distribution of fish products), **Marine non-living resources** (Oil and gas, Other minerals, Support activities), **Marine renewable energy** (Offshore wind energy), **Port activities** (Cargo and warehousing, Port and water projects), **Shipbuilding and repair** (Shipbuilding, Equipment and machinery), **Maritime transport** (Passenger transport, Freight transport, Services for transport), **Coastal tourism** (Accommodation, Transport, Other expenditure).

Generating the largest share of employment (54%) and GVA (29%)

Source: EU Blue Economy Observatory - European Commission

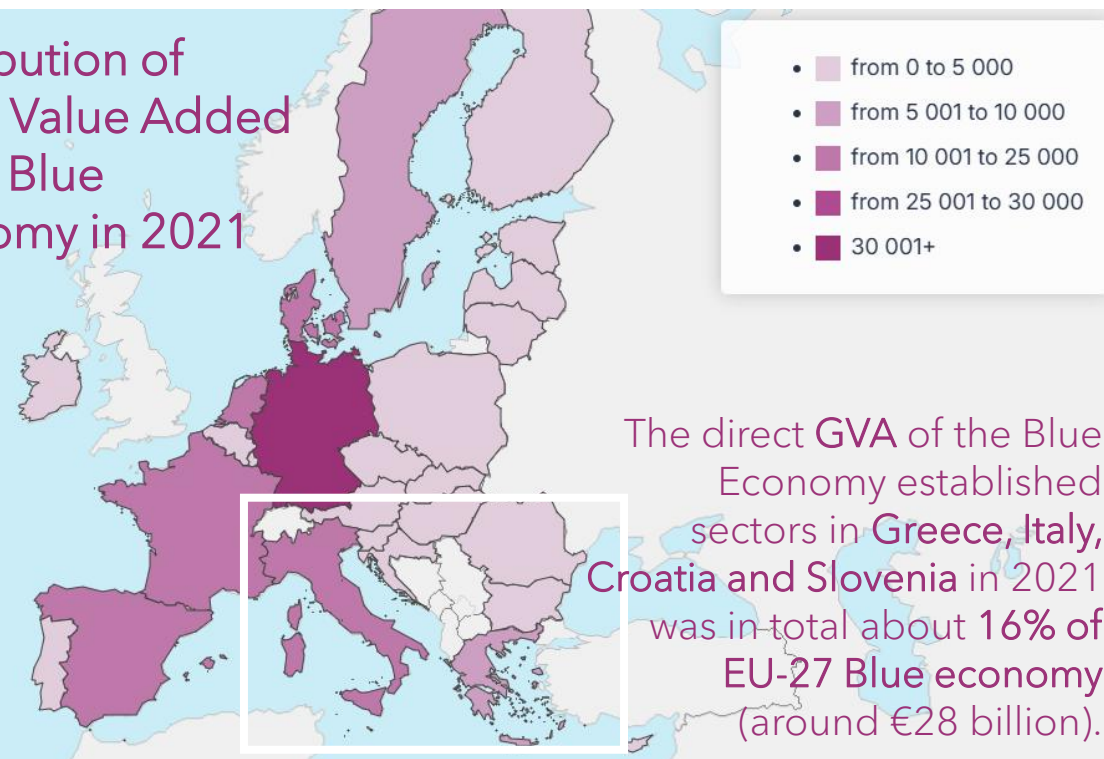
BLUE ECONOMY VALUE EU MEMBER STATES

Distribution of employment in the Blue Economy in 2021



The **EMPLOYMENT** of the Blue Economy established sectors in **Greece, Italy, Croatia and Slovenia** in 2021 was in total about **28%** of EU-27 Blue economy (around 989 200 people).

Distribution of Gross Value Added in the Blue Economy in 2021



The direct **GVA** of the Blue Economy established sectors in **Greece, Italy, Croatia and Slovenia** in 2021 was in total about **16%** of EU-27 Blue economy (around €28 billion).

Country	Driver sector	People employed	% national workforce	GVA	% national GVA
GREECE	Coastal Tourism	446 000	11.4%	€6.5 billion	4.1%
ITALY	Coastal Tourism	400 000	1.8%	€18.2 billion	1.1%
CROATIA	Coastal Tourism	136 000	8.0%	€2.9 billion	6.0%
SLOVENIA	Port Activities	7 200	0.7%	€0.3 billion	0.7%

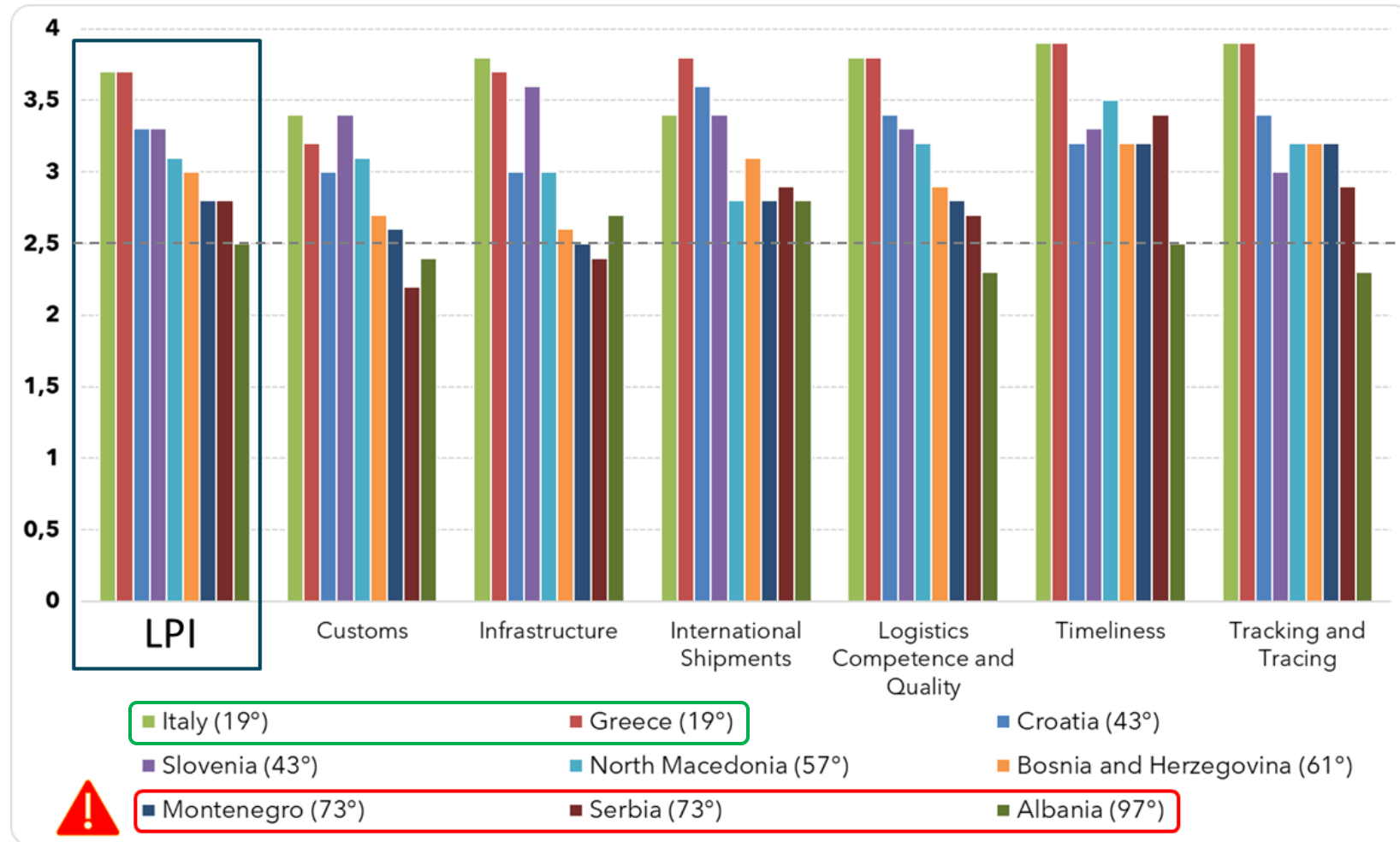
Source: elaboration of Uniontrasporti on EU Blue Economy Observatory – European Commission

WHAT ABOUT THE OTHER WESTERN BALKANS COUNTRIES?

- Consolidated figures for the entire Western Balkans' blue economy are not readily available, but the existing information highlights its **growing importance and potential**.
- There is plenty of room for **boosting key sectors** like: **Sustainable Fisheries and Aquaculture**, capitalizing on export opportunities and developing eco-labeling schemes to better compete and target premium markets, but also **Tourism** in all its facets, from coastal and maritime to nautical, other than **emerging sectors** like blue technologies and offshore wind energy.
- The blue economy can drive jobs, sustainability, and innovation, but needs **smart investment and regional cooperation** to realize its full potential.
- Albania** is increasingly recognized as a **leader in the Western Balkans' blue economy**, with a proactive approach to developing a sustainable and innovative blue economy, particularly in sectors like sustainable fisheries, coastal tourism, and renewable marine energy.



LOGISTIC PERFORMANCE INDEX 2023



"The LPI is an interactive benchmarking tool created to help countries identify the challenges and opportunities they face in their **performance on trade logistics** and what they can do to improve their performance.

The LPI 2023 allows for comparisons across **139 countries**.

The 2023 LPI for the first time measures the speed of trade with indicators derived from big datasets tracking shipments."

Source: elaboration of Uniontrasporti on data from The World Bank Group e UNCTAD - United Nations Conference on Trade and Development

TEN-T CORRIDORS CROSSING THE AREA

Adriatic-Ionian region

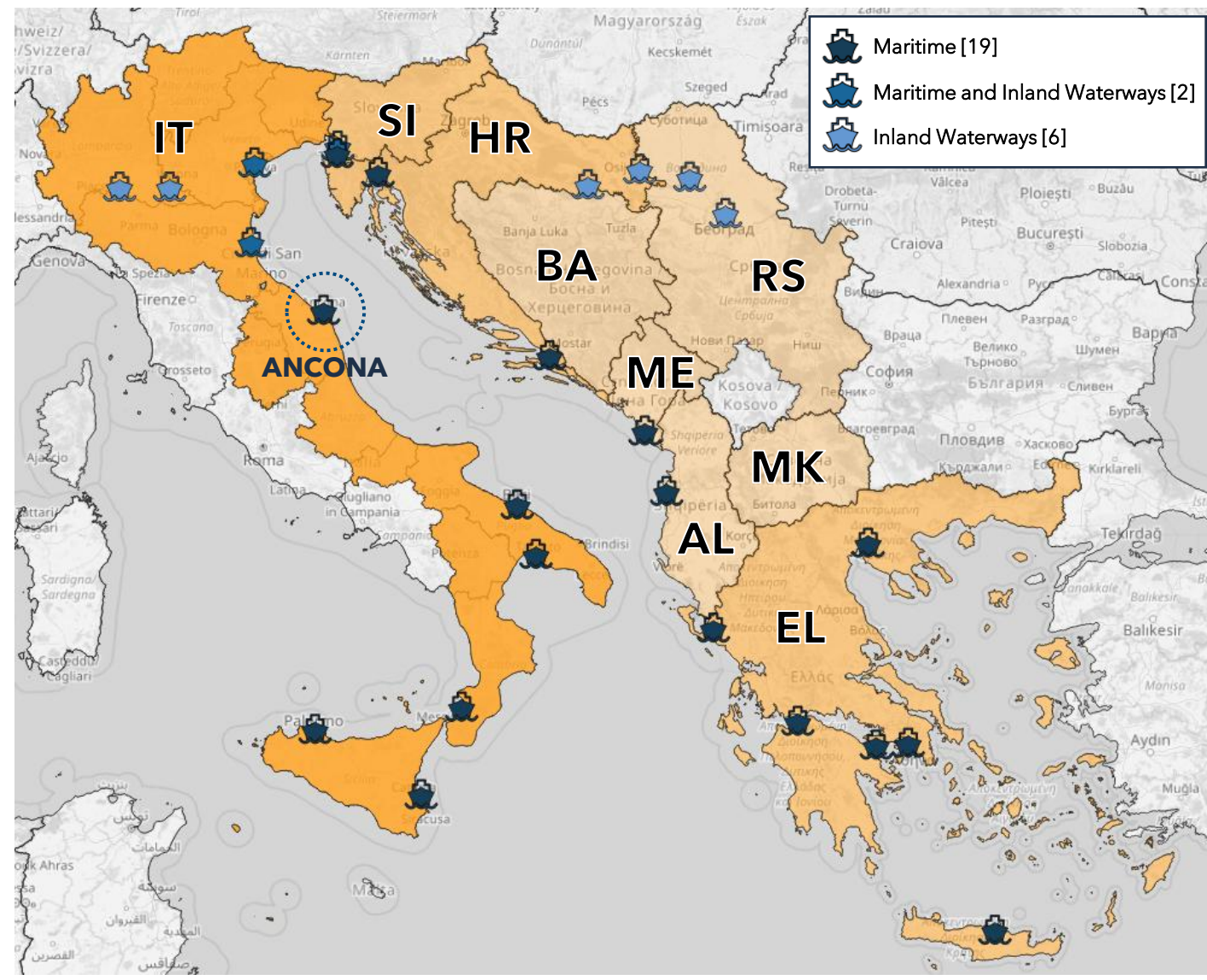
CORE NETWORK CORRIDORS

- RHINE - DANUBE
- BALTIC SEA - BLACK SEA - AEGEAN SEA
- WESTERN BALKANS - EASTERN MEDITERRANEAN
- BALTIC SEA - ADRIATIC SEA
- SCANDINAVIAN - MEDITERRANEAN
- MEDITERRANEAN

Source: elaboration of Uniontrasporti on data from European Commission - DG MOVE and Ministry of Foreign Affairs and International Cooperation



FOCUS ON THE MAIN CORE NETWORK PORTS



Adriatic-Ionian region

COUNTRY	PORTS - total number and type (Maritime/Inland WaterWays)
EL- GREECE	6 Thessaloniki (M), Iraklion (M), Piraeus / Ikonio (M), Igoumenitsa (M), Patra (M), Agii Theodori (M)
AL- ALBANIA	1 Durres (M)
ME- MONTENEGRO	1 Bar (M)
RS - SERBIA	2 Beograd (IWW), Novi Sad (IWW)
HR- CROATIA	5 Rijeka (M), Ploče (M), Split (M) Slavonski Brod (IWW), Vukovar (IWW)
SI - SLOVENIA	1 Koper (M)
IT- ITALY	11 Trieste (M), Venezia (M/IWW), Cremona (IWW), Mantova (IWW), Ravenna (M/IWW), Ancona (M) , Bari (M), Taranto (M), Palermo (M), Augusta (M), Gioia Tauro (M)
TOTAL	27 (21 maritime + 6 IWW)

FOCUS ON THE MAIN CORE NETWORK PORTS

 > 1 Corridor

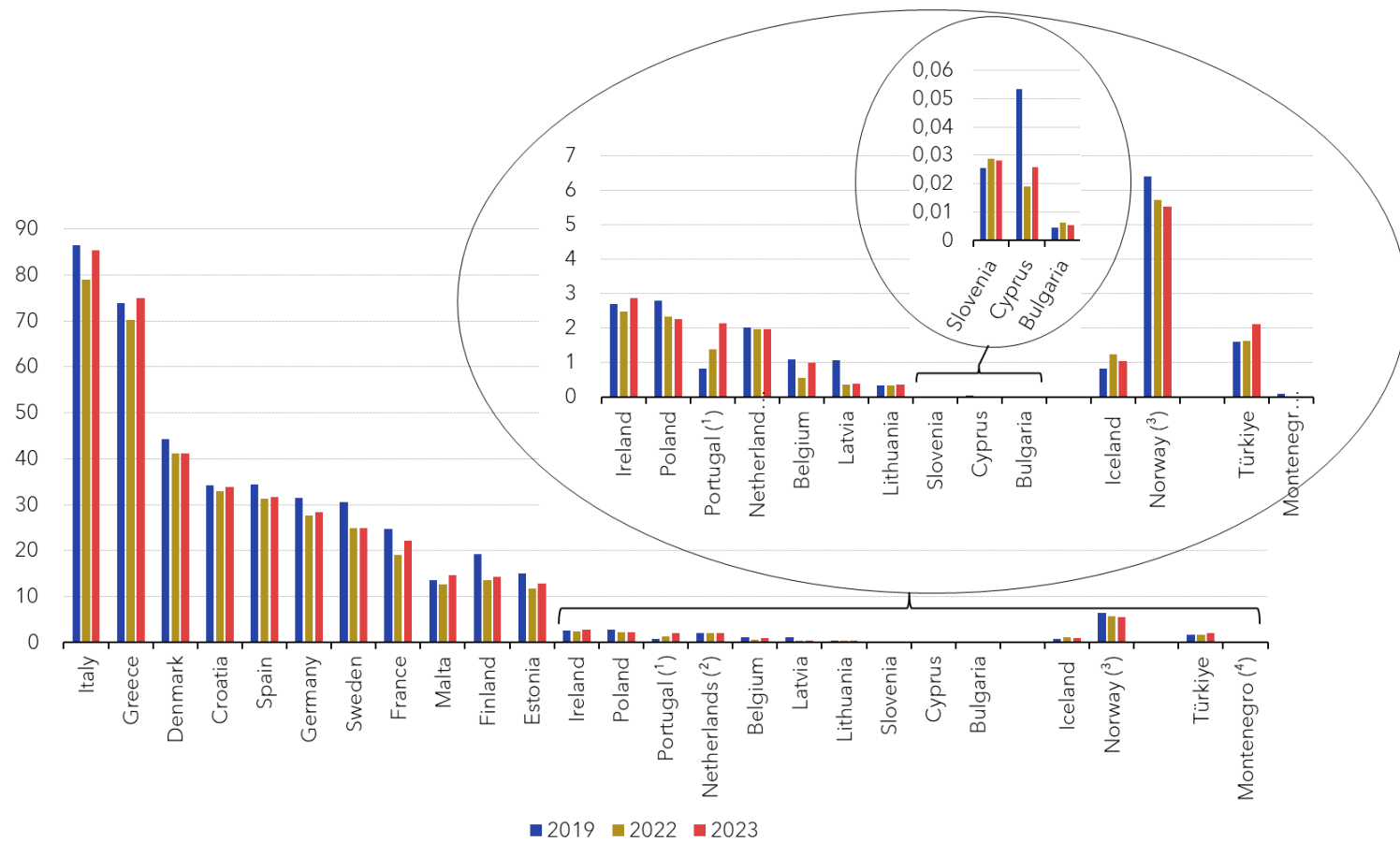
COUNTRY		CORE PORTS	CONNECTION WITH RAIL	CORE CORRIDORS						TYPE
				RHN-DAN	BT-BLK-AG	WBL-ESTM	BLT-ADR	SCAN-MED	MED	
AL	ALBANIA	Durres	-			■				Maritime
HR	CROATIA	Slavonski Brod	-	■		■				IWW
HR	CROATIA	Vukovar	-	■		■				IWW
HR	CROATIA	Rijeka	ok			■	■		■	Maritime
HR	CROATIA	Ploče	ok			■				Maritime
HR	CROATIA	Split	ok				■			Maritime
EL	GREECE	Thessaloniki	ok		■	■				Maritime
EL	GREECE	Iraklion	no		■	■				Maritime
EL	GREECE	Igoumenitsa	no			■				Maritime
EL	GREECE	Piraeus / Ikonio	ok		■	■				Maritime
EL	GREECE	Patra	ok			■				Maritime
EL	GREECE	Agii Theodori	-			■				Maritime
IT	ITALY	Cremona	-						■	IWW
IT	ITALY	Mantova	-						■	IWW
IT	ITALY	Bari	no			■	■	■		Maritime
IT	ITALY	Taranto	ok					■		Maritime
IT	ITALY	Ancona	ok				■	■		Maritime
IT	ITALY	Ravenna	ok				■		■	Maritime/IWW
IT	ITALY	Venezia	ok				■		■	Maritime/IWW
IT	ITALY	Trieste	ok			■	■		■	Maritime
IT	ITALY	Palermo	no					■		Maritime
IT	ITALY	Gioia tauro	ok					■		Maritime
IT	ITALY	Augusta	ok					■		Maritime
ME	MONTENEGRO	Bar	-			■				Maritime
RS	SERBIA	Beograd	-			■				IWW
RS	SERBIA	Novi Sad	-			■				IWW
SI	SLOVENIA	Koper	ok			■	■		■	Maritime

MARITIME PORTS PERFORMANCE PASSENGERS

- The total seaborne passengers embarked and disembarked in EU ports is estimated at **395.3 million** in 2023, increasing compared with 2022 (+5.8%).
- Italy (21%)** reported the largest share of the EU total in 2023, followed by **Greece (19%)**, Denmark (10%), Croatia (8%) and Spain (8%) whose total accounts around 66% of all passengers.

Italy, Greece and Croatia play a key role in the Adriatic-Ionic region covering around **48%** of all EU seaborne passenger traffic in 2023.

Seaborne passengers embarked and disembarked in all ports, 2019, 2022 and 2023 (million)



Note: countries are ranked based on 2023 data. No transport of passengers in Romania.

(1) Break in time series in 2020 and 2023 because data coverage improved.

(2) Data exclude cruise passengers.

(3) Data on international maritime passenger transport only.

(4) 2023 data not available. Data exclude cruise passengers.

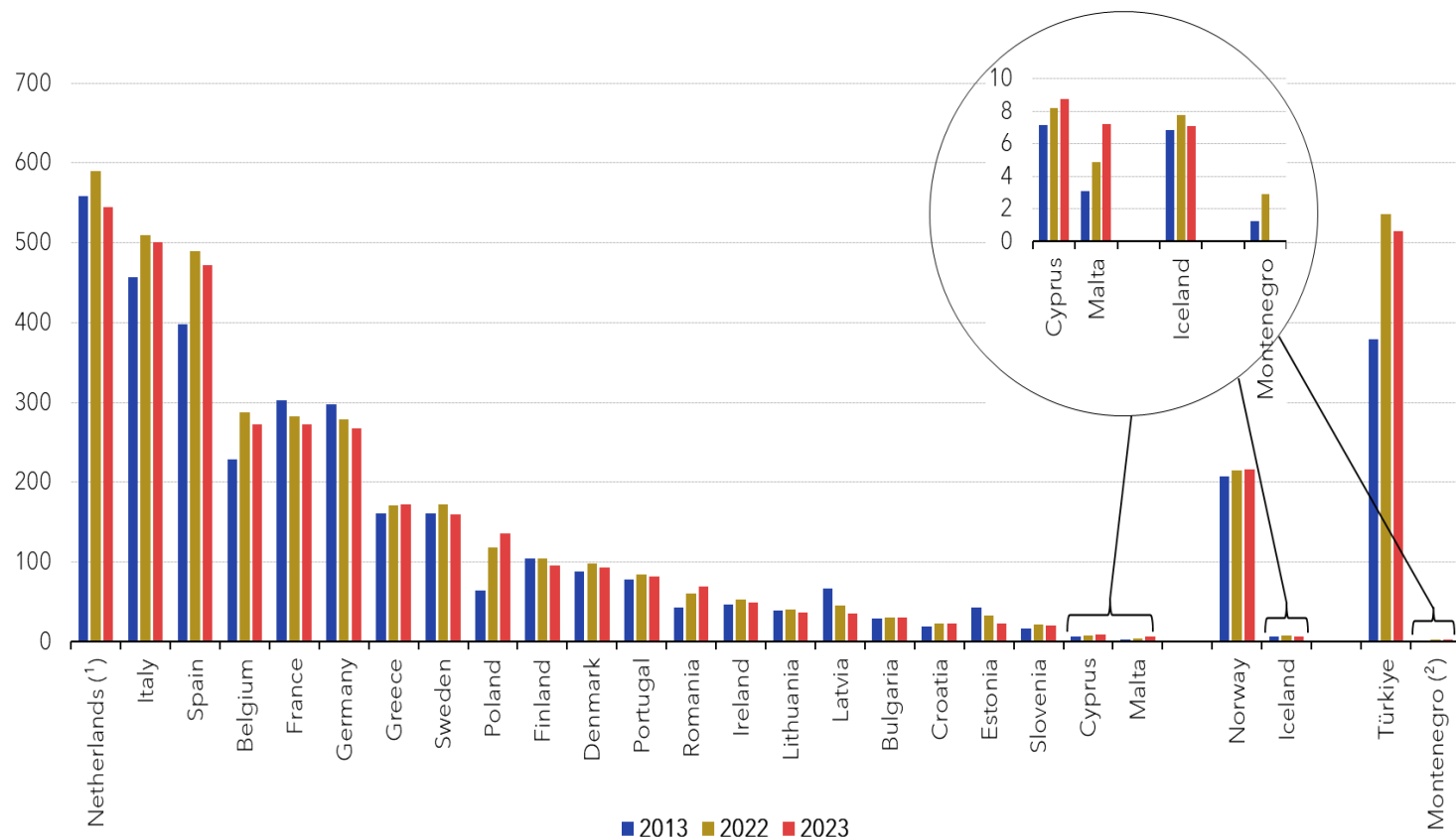
Source: Eurostat (online data code: mar_mp_aa_cph)

MARITIME PORTS PERFORMANCE GOODS

- The total gross weight of goods handled by EU ports is estimated at **3.4 billion tonnes** in 2023, decreasing compared with 2022 (-3.9%), mainly attributed to the restrictions on goods transport with Russia, after its military aggression against Ukraine.
- The Netherlands reported the largest share (16.1% of the EU total in 2023), followed by **Italy (14.8%)** and **Spain (14.0%)**

6 Adriatic-Ionic Countries covers around **21.5%: Italy (14.8%), Greece (5.1%), Croatia (0.7%), Slovenia (0.6%), Albania (0.2%), Montenegro (0.1%)**

Gross weight of seaborne goods handled in all ports, 2013, 2022 and 2023 (million)



Note: countries are ranked based on 2023 data.

(¹) Break in time series from 2020 due to methodological improvement in the data reported by the Netherlands.

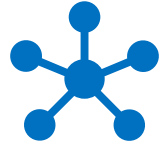
(²) 2023 data not available.

Source: Eurostat (online data code: mar_mg_aa_cwh) for all information except than for Albania

MARITIME TRANSPORT WEAKNESSES ↔ CHALLENGES

1

Last-mile hinterland connections to ports



Missing or poor links: construction and upgrade of port/hinterland infrastructure to deal with new capacity and synchro-modality demands.



Missing rail connection in Greece (Igoumenitsa), Italy (Bari), Montenegro (Bar), Albania (Dures).

2

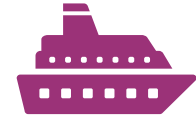
Development of port cities



Improve port-urban relationship: enhance synergies for better mobility of residents and higher quality of life in the port city. This requires simultaneous **technical advances in the port and improvements in urban planning** and mobility in the port-city belt.

3

Motorways of the Sea (MoS)



The Adriatic-Ionian macro-region is part of the EU's Motorways of the Sea (MoS) initiative, which aims to promote the use of maritime transport as **an alternative modality to road transport**.



In summer 2023, the ferry line Bar-Ancona was re-launched and negotiations are underway with interested parties for the resumption of the Bar-Bari ferry service, one of the oldest maritime connections in the Adriatic.

MARITIME TRANSPORT WEAKNESSES ↔ CHALLENGES

4

Digital Transformation



Adoption of the “**smart port**” model to optimize logistics, improve efficiency, enhance security, and reduce environmental impact.



- **VTMIS** - Vessels Traffic Monitoring and Information System delayed implementation (i.e. Montenegro and Albania) and not complete alignment with the EU acquis.
- **ITS** - Information Transport System needs to adopt a strategic framework. Significant results are to be highlighted in Italy and Greece with a project for the creation of a National Integrated Port Community System and in Montenegro as the National maritime Single Window was launched in August 2024.

5

Green Transformation



Environmentally friendly policies and provision of **clean fuels**.

LNG - Liquefied Natural Gas facilities **no concrete progress in Western Balkans** Countries. LNG can give major contribution to reduce carbon emissions from maritime freight transportation, but also for passengers, ferry and cruise ships.

6

Legislation framework



A basic **alignment** with the legislation is needed also for landlocked countries (i.e. North Macedonia).

CONCLUSIONS

- The Adriatic Ionic area's **strategic location**, as well as its proximity to major European markets, make it an **important hub for shipping and logistics**.
- **Maritime transport** is a crucial component of the region's economy, serving as a **major driver** of trade, tourism, and economic growth.
- **Ports need to play new function and role**: from being multimodal hubs in the supply chain linking the sea with the hinterland, they are developing into hubs and facilitators of sustainable energies, clusters of industry and circular economy, as well as important pillars of geo-political and geo-economic resilience
- Investments in the **sustainability and energy transition** are becoming the one of the most important in the European framework. A port is now obliged to raise its environmental footprint by delivering on **EU's Green Deal**, as well as other environmental and climate policy goals.
- Key **challenges** need to be faced: **last mile connections** which envisage **modernize and upgrade** ports infrastructure and **port cities integration**, develop a plan of **MoS**, optimize processes, port interfaces and **procedures** through **digitalization**, accelerate the provision of bunkering facilities for **alternative** fuels, align **policies** between Countries and the EU legislation framework.

Thank you!

Antonello Fontanili
fontanili@uniontrasporti.it



UNIONTRASPORTI