

2011 INTERNATIONAL CONFERENCE ON LOGISTICS & MULTIMODAL TRANSPORT  
9th – 11th OCTOBER 2011  
Las Palmas (Canary Islands), Spain

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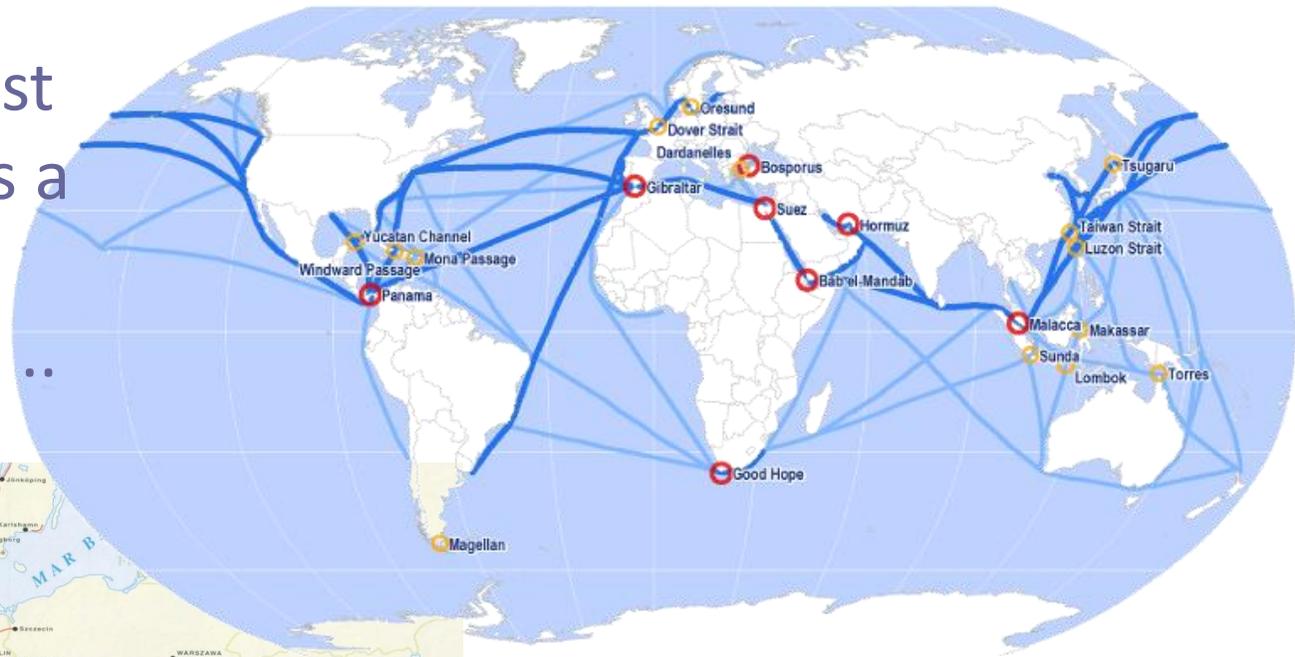
## SHORT SEA SHIPPING: A SPANISH VIEW

Pilar Tejo Mora-Granados  
Technical Director  
SPC - SPAIN



# The geostrategic position of Spain

Spain is a country almost "island" which occupies a **central position** in the global maritime map ... ..



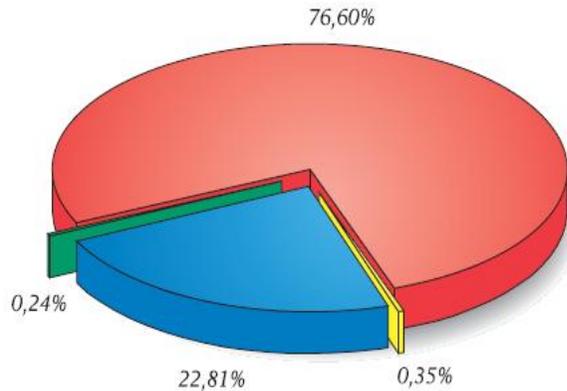
....but it is **peripheral** in the map of **Europe**, especially after its enlargement



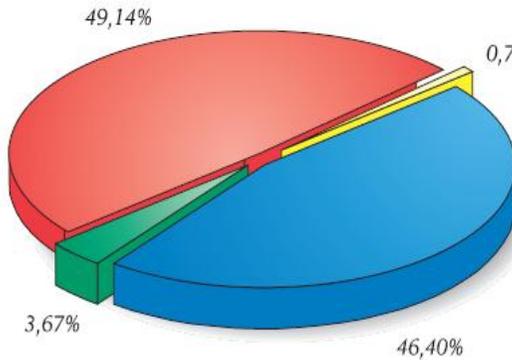
# SSS in Spain – The flows of international transport

- Maritime is the predominant mode of international transport in Spain, although **the road is a majority** in trade with Europe.

IMPORTACIÓN / TOTAL IMPORTS

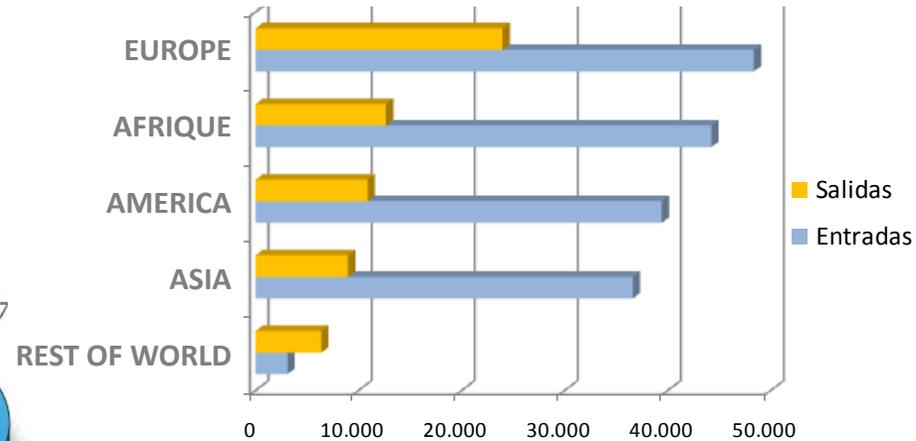


EXPORTACIÓN / TOTAL EXPORTS

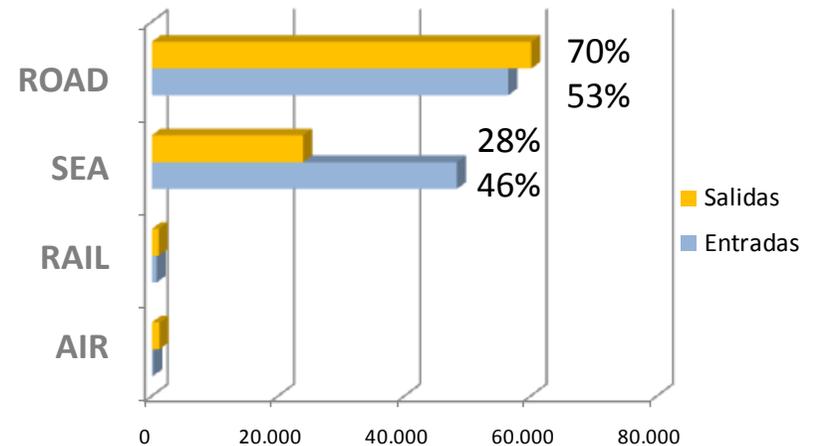


Fuente: Agencia Tributaria

MARITIME EXTERNAL TRADE. Tns 2010



FLOWS WITH EUROPE. MODAL SPLIT. Tns 2010

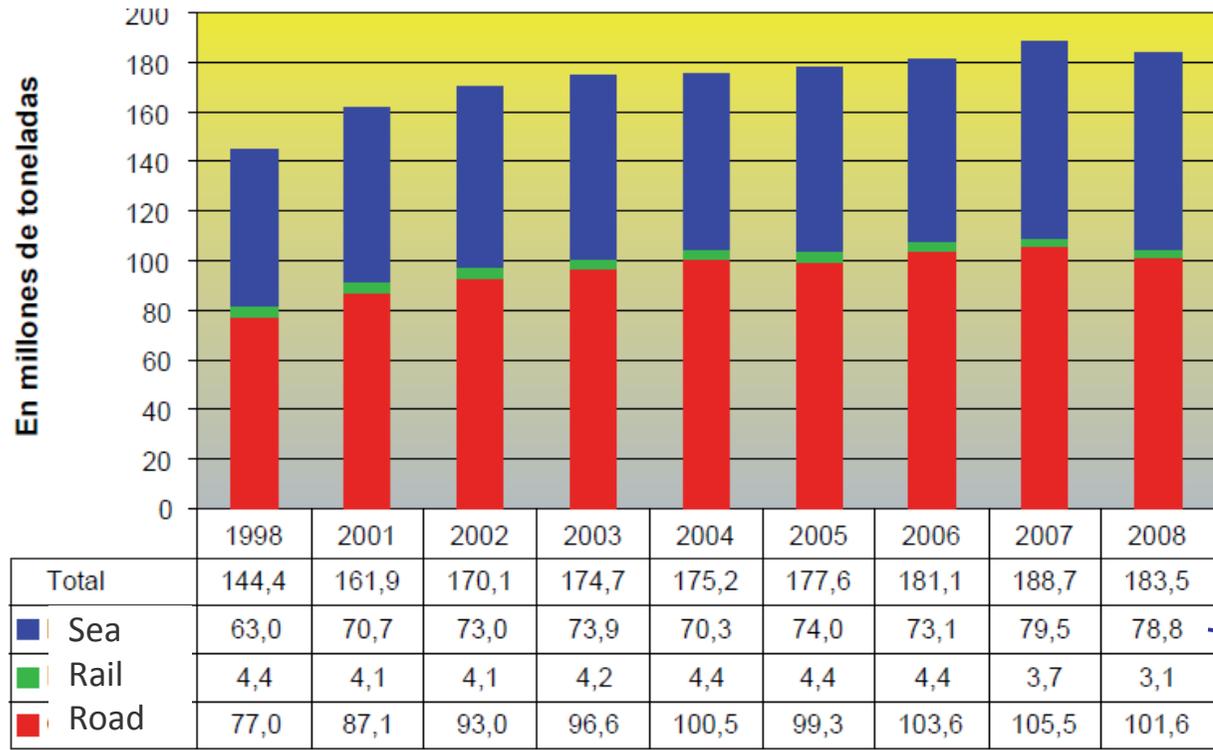


Las Palmas, 11.10.2011



- The road increase has been **above** than the maritime

Freight transport between Iberian P. and other EU-15 countries.  
Modal split evolution (Mill. t)



	Evolución 1998/2008		
	Total	Annual Average	(2008/2007)
Total	27%	2,4%	-2,8%
Road	32%	2,8%	-3,7%
Rail	-29%	-3,4%	-15,1%
Sea	25%	2,3%	-0,9%

→ **43%**  
→ **55%**

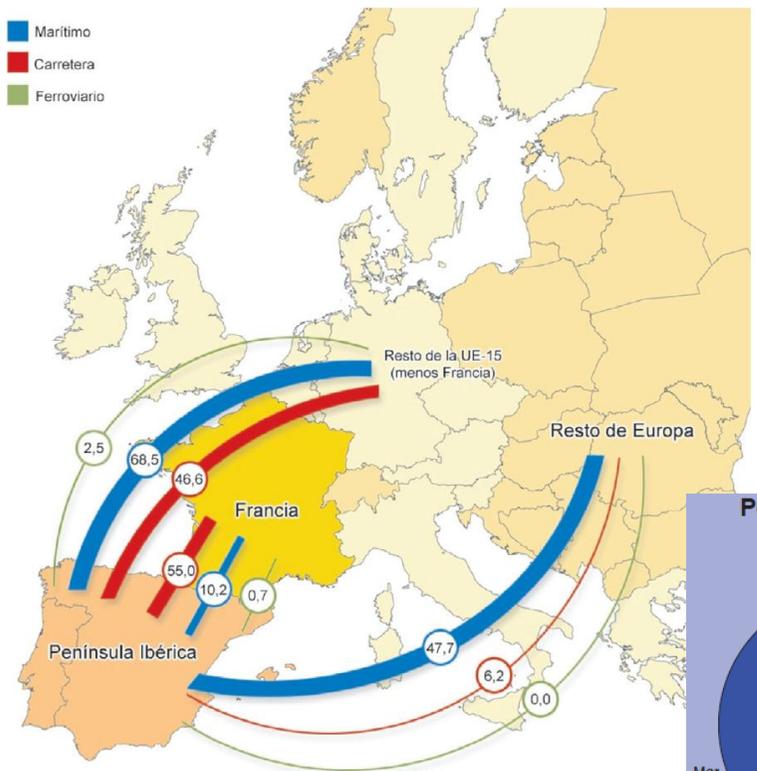




# SSS in Spain – International transport flows

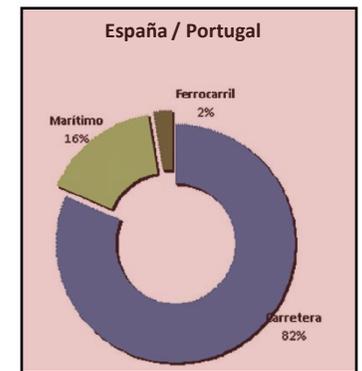
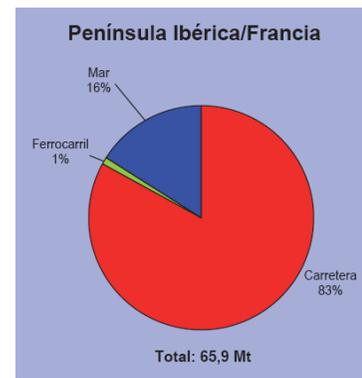
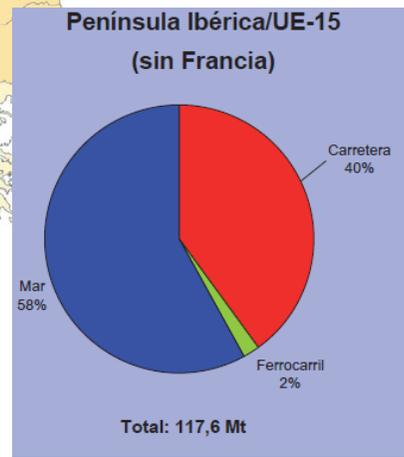
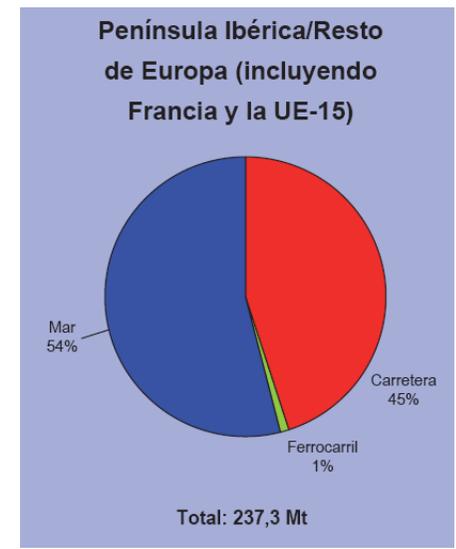
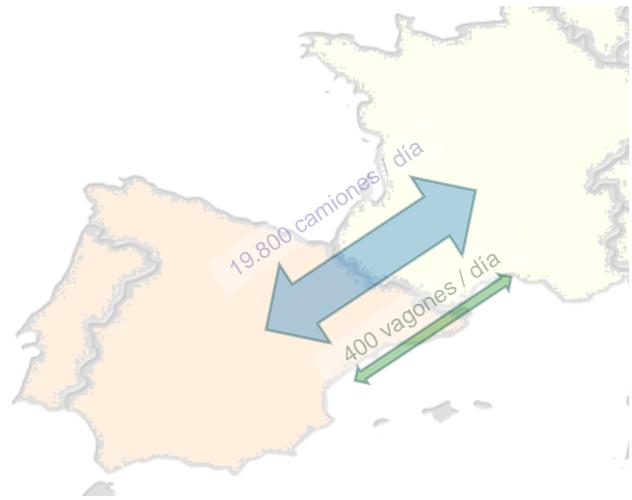
## Freight flows between Iberian P. and Europe.

### Modal split (million T.)



## Freight flows between Iberian P. and Europe.

### Modal split (%)



Las Palmas, 11.10.2011

Source: Observatorio hispano-francés de tráfico en los Pirineos. Junio 2010  
 Observatorio transfronterizo España – Portugal. Dic. 2009



## Transport and logistics, key of competitiveness of business and territories

- Transport is fundamental to **our economy and society**. Mobility is vital to economic growth and job creation.
- Infrastructure shapes mobility. (...) Overall, transport infrastructure investments have a **positive impact on economic growth**, create wealth and jobs, and enhance trade, geographical accessibility and the mobility of people.
- **Effective transport systems are key to European companies' ability to compete in the world economy**. Logistics, such as transport and storage, account for 10–15% of the cost of a finished product for European companies

## WHITE PAPER OF TRANSPORT 2011





# Transport and logistics, key of competitiveness of business and territories

## COMPETITIVENESS FACTORS

## INFLUENCE OF LOGISTICS

Quality of products



- **Flexibility** of the company and its capacity of adaptation in the short time to demand changes

Price of products



- **Logistics cost** varies, depending on the unit value of the product, from 5% to 40% of the total cost

Delivery service of products

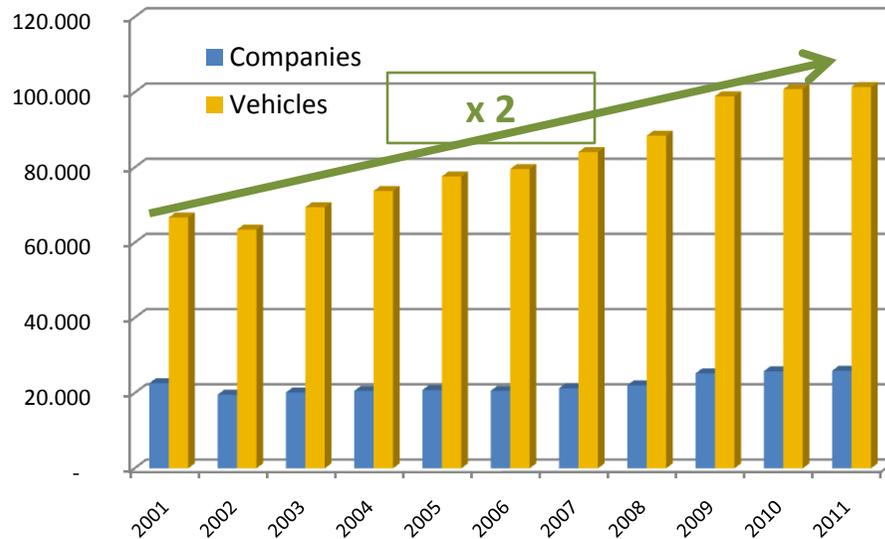


- Delivery services can differentiate the product and provide **competitive advantage**

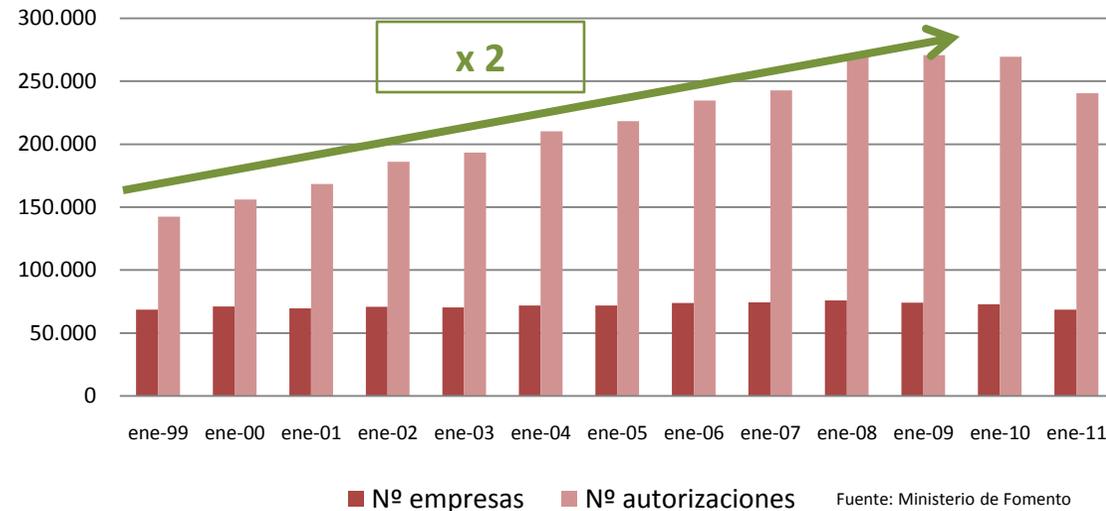


- Road freight transport sector **has increased very significantly, multiplied by 2 in 10 years**

EU LICENSES - EVOLUTION



NUMBER OF PUBLIC TRANSPORT AUTHORIZATIONS AND COMPANIES. EVOLUTION



Fuente: Ministerio de Fomento





- "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. **Short sea shipping includes domestic and international maritime transport, including feeder services, along the coast and to and from the islands, rivers and lakes.** The concept of short sea shipping also extends to maritime transport between the Member States of the Union and Norway and Iceland and other States on the Baltic Sea, the Black Sea and the Mediterranean."

(European Commission)

## CADENA DE TRANSPORTE MARÍTIMO DE CORTA DISTANCIA



© TEIRLOG

Las Palmas, 11.10.2011

CADENA UNIMODAL CARRETERA Spanish View



## Practical Concept

- A **highway** is a road with:
  - **High** quality (safety)
  - **High** capacity
- A **Motorway of the Sea** is a SSS service with:
  - High **quality** (safety, frequency, transit time)
  - High **capacity**
  - **Excellent links** with the transeuropean transport TEN-T network





## ■ SPC Spain

- Set up in 2002
- Member of the European Shortsea Network (ESN)
- Members: 29
- Associations of shipowners, shipping agents and stevedore companies, pilots, mooring services, road transport, freight forwarders,...
- Port Authorities, State Ports, organisations and regional ports directorates
- Port foundations, ...

## ■ Administration (Spain & EU)

- Little progress in simplifying administrative and customs barriers

## ■ Shipping Companies

- Implementation of many new services, especially by foreign companies
- Perception of high risk business
- Not always successful, some services have been withdrawn
- Lack of commitment from users





## Strategic Aim

- **Consolidate a forum** for public and private agents involved in the land-maritime transport chains, with a vocation for **coordination, identification and promotion** of initiatives that contribute to realizing the potential of maritime mode with an intermodal approach and consequently **complementary to land transport**, to configure door to door transport solutions and always respecting the goals, objectives and competencies of each of its members.

## Initiatives

- **External Promotion & communication**: broadcast diverse actions, new website ....
- **Internal Promotion**: To promote partnerships, sectorial meetings / contacts between agents of SSS chain
- Technical development aimed to identify problems and find solutions: **Working Groups**, Monitoring, analysis and evaluation of initiatives
- External relationships
- **Internal management**: attracting new members, ...





- **72 regular services from 12 Spanishs ports**
- **57 shipping companies** (30 services offered bay more than one shipping company)
- **Average frequency: 1,3 exits/week)**
- **Ports: 53 with direct link + 38 with no direct link**

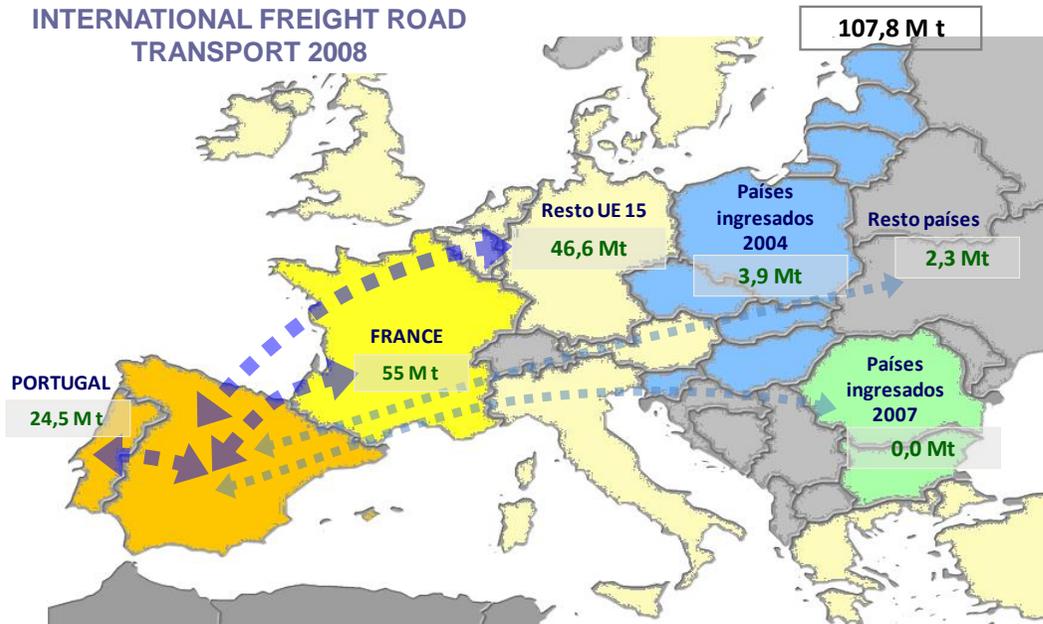
Side coast	Services	Shipping companies	Ships	Ports
Atlantic	34	33	68 Cont + 24 Ro-Ro	27 D (+20 ind)
Mediterranean	46	37	132 Cont + 39 Ro-Ro	36 D (+32 ind)





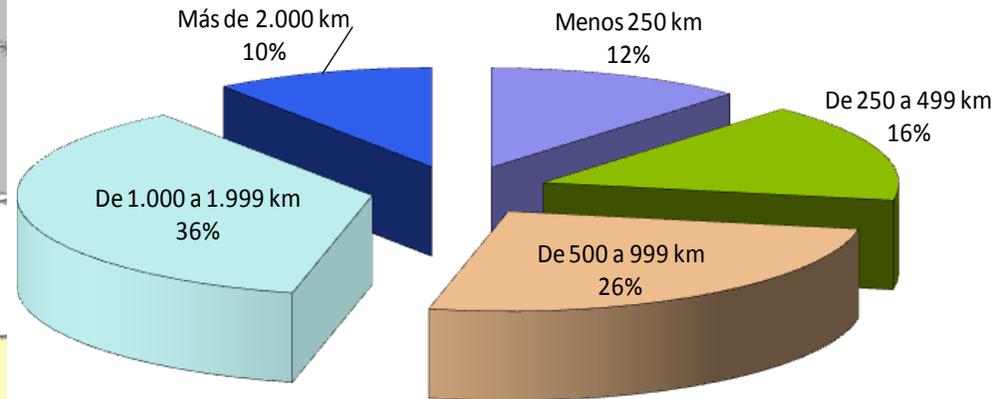
- Almost 50% of international road freight transport takes place at the appropriate distances for Shortsea Shipping

INTERNATIONAL FREIGHT ROAD TRANSPORT 2008



Fuente: Observatorio hispano-francés de tráfico en los Pirineos. Jun Observatorio transfronterizo España – Portugal. Di

INTERNATIONAL ROAD FREIGHT TRANSPORT BY DISTANCES (share in tonnes)



Source: EPTMC 2009



## Benefits of the Short Sea Shipping as compared to a unimodal road:

- Reduces dependence on land transport infrastructure
- Lower transport costs
- Lower fuel costs influence
- Shortest transit time (minimizes impact of driving and rest times regulation)
- Avoids congestion and bottlenecks
- Avoids traffic restrictions
- Increases security reduces risk of theft
- Increases load per unit
- Improves drivers' quality of life

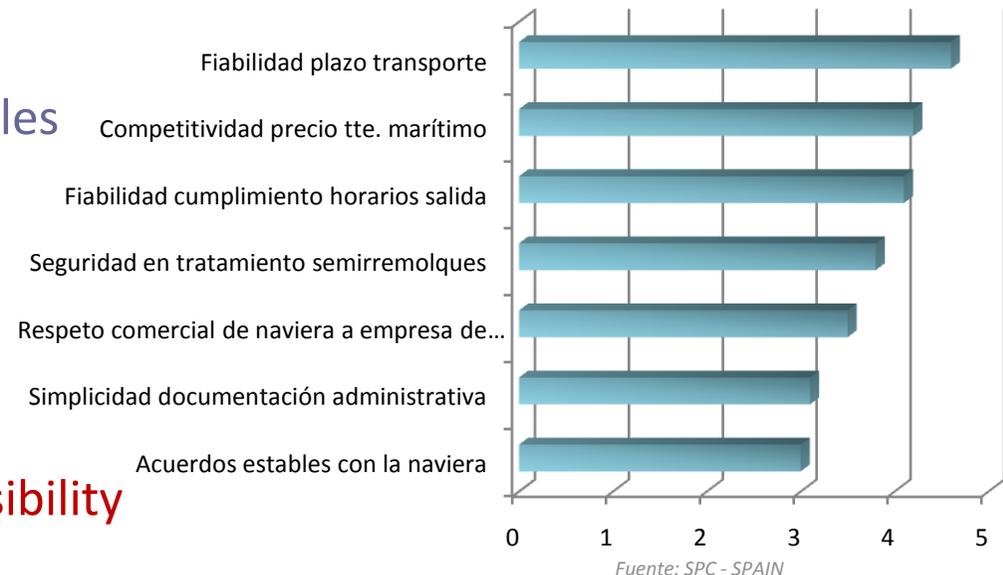




## KEY FACTORS of Short Sea Shipping for road transport operator:

- Ship Schedules
- Frequency of service
- Transit Times
- Reliability of transit times and schedules
- Competitive prices
- Commercial respect
- Vehicle safety
- Logistic approach
- Documentary complexity and responsibility

VALORACIÓN DE LOS FACTORES DE DECISIÓN PARA LA UTILIZACIÓN DEL TMCD





## Obstacles to the development of SSS against the unimodal alternative of the road:

- **Costs of "friction"**: inefficiencies of land-sea interface, overcharges, delays and loss of reliability in transit time
- **Increased complexity**
  - ✓ Administrative procedures, documentation, customs inspections, and so on.
  - ✓ Multimodal operation itself
  - ✓ Legal liability regime
- **Less flexibility**
  - ✓ Necessarily linked to seaports. Stiffness of itinerary, schedules
  - ✓ Need to concentrate greater amounts of cargo
- Initially **perception of lower reliability**, now largely overcome





## Obstacles to the development of SSS

### Shipping Company



- Difficulties for concentrating the necessary volume of cargo to give the required frequency
- Difficulties for implementing new services due the **high economic risk** in the period until reaching the breakeven

### Road Freight Company



- Need of **higher capacity** of organization & planning
- Misgivings about **the risk of losing customers** (in favour of the shipping company, of larger business size)
- Perception of loss of control of the chain
- Difficulty for resolving the destination drayage
- Risk of damages to transportation equipment (semitrailers). Quick and simple system of claim
- Recruitment difficulties return



## Ports

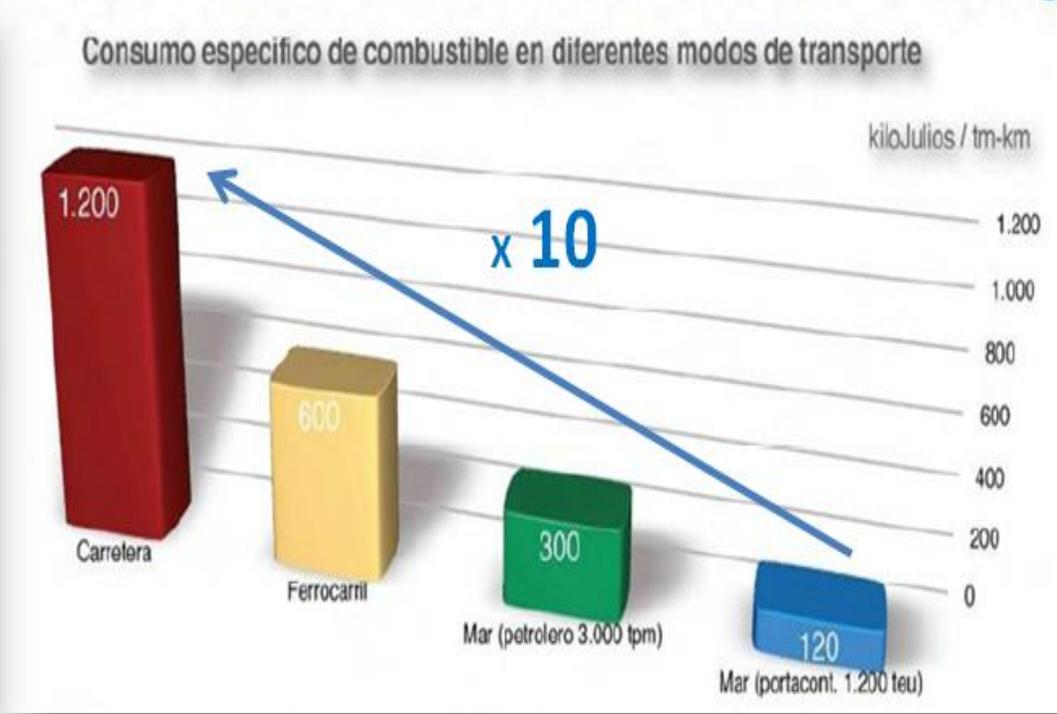
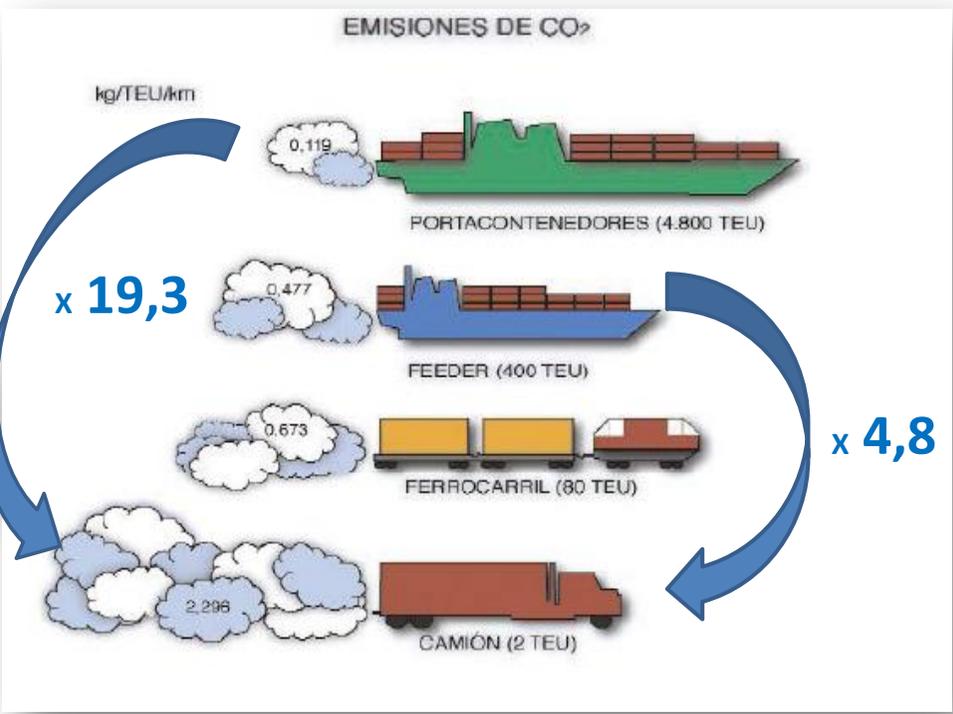


- **Accessibility difficulties :**
  - ✓ By interferences with urban areas
  - ✓ By congestions in certain time slots
  - ✓ By terminals schedules
- **Modal interchange extracosts:**
  - ✓ By paralizaciones
  - ✓ By stowage schedules rigidities
  - ✓ By high stowage costs



# Environmental aspects: new obstacles to the development of SSS

Maritime Transport is **the most energy efficient and lower CO2 emissions** mode of transport

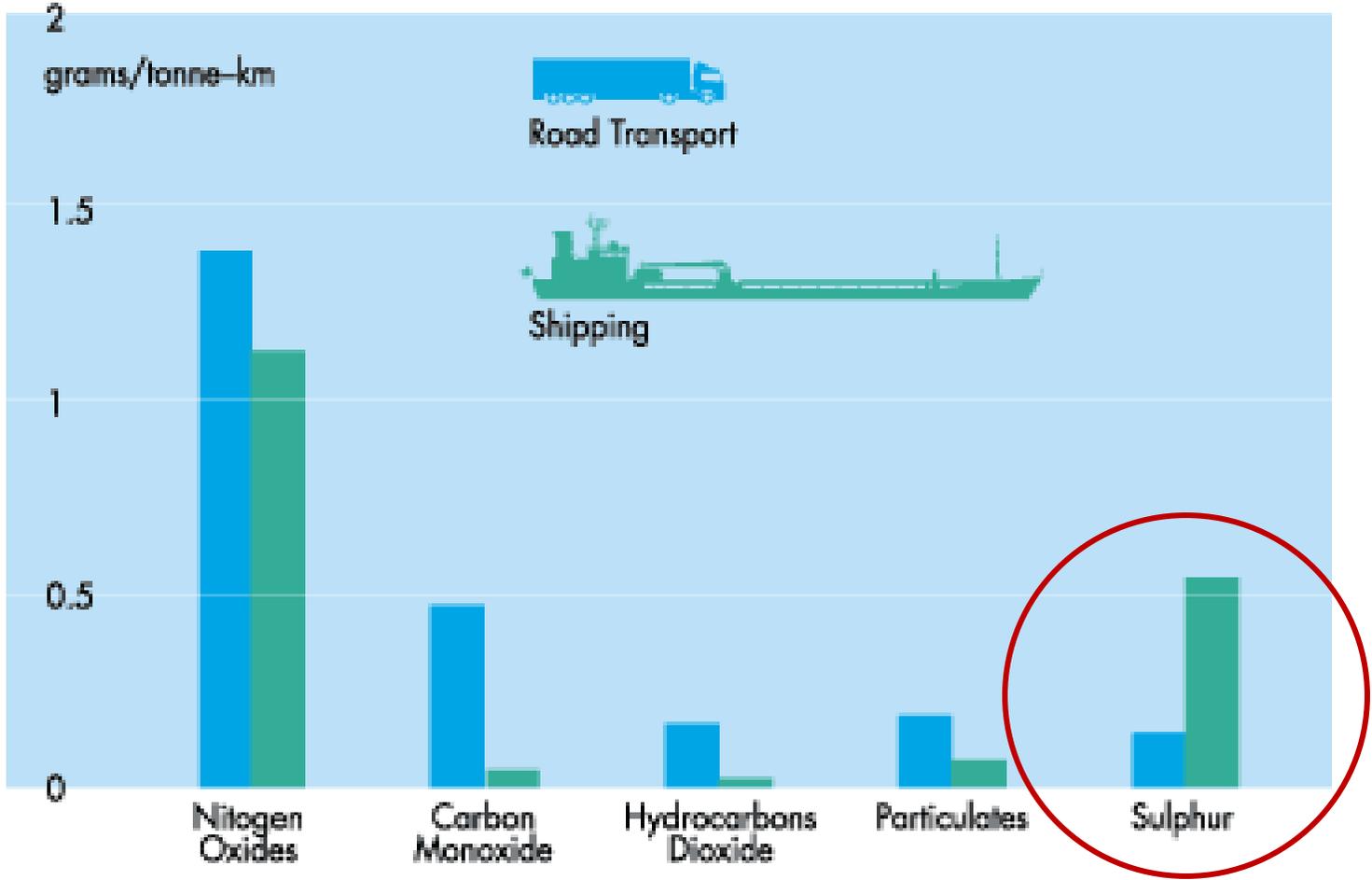




# Environmental aspects: new obstacles to the development of SSS

Equivalent exhaust gas emissions -  
heavy domestic road transport vs shipping

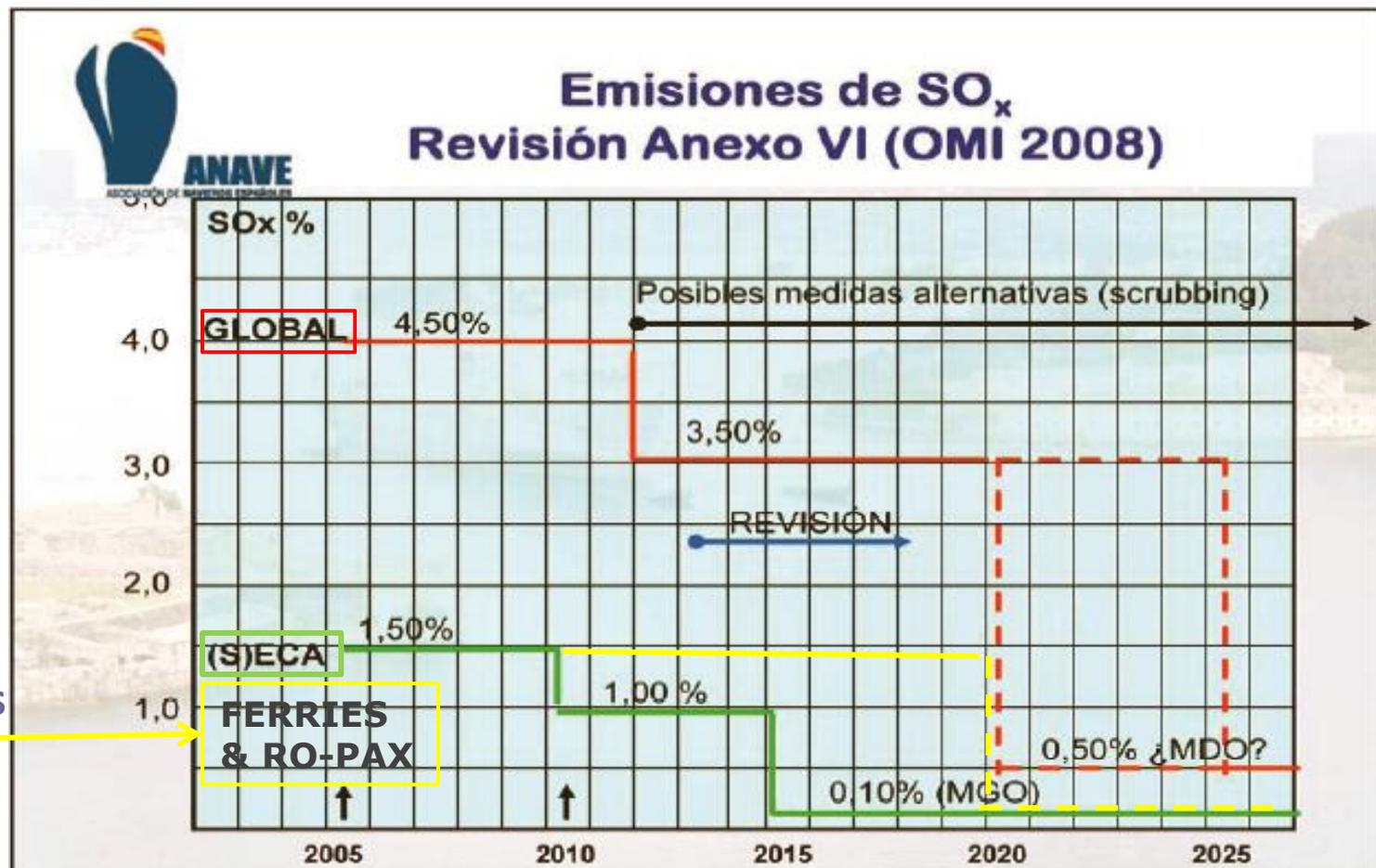
Source: Swedish Transport Research Board 1993





# New regulations threaten the competitiveness of SSS

Directive 2005/33 establishes a ceiling of **1.5%** for ferries or ro/pax ships and a maximum of **0.10%** for vessels at berth in EU ports.



Draft  
Amendments  
to Directive





<http://>

SHORTSEA Promotion centre SPAIN

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**Líneas existentes**

**Simulador de Cadenas de Transporte**

[Documentacion](#)

[Grupos de Trabajo](#)

### SIMULADOR DE CADENAS DE TRANSPORTE

Origen:   Valladolid, España

Destino:   Hanóver, Alemania

**Parámetros a definir para el transporte sólo por carretera**

Euros/Km:  Vel. Media Km/h:

Peajes:

**Parámetros a definir para el tramo terrestre en las cadenas que usan el TMCD**

Euros/Km Acarreo Origen  Vel. Km/h Acarreo Origen:

Euros/Km Acarreo Destino  Vel. Km/h Acarreo Destino:

**Opciones adicionales para el tramo marítimo en las cadenas que usan el TMCD**  
(Los cálculos básicos se realizarán en el supuesto de embarcar sólo Semirremolque y Carga General)

Mercancías Peligrosas  ¿Acompañado?

Carga refrigerada  Animales Vivos

**Seleccione qué líneas quiere consultar**

TODAS

RECOMENDADAS

Barcelona → Civitavecchia a través de GRIMALDI & TRASMEDITERRANEA

Barcelona → Flushing a través de FLOTA SUARDIAZ

Barcelona → Fos a través de DEMLINE

Barcelona → Génova a través de GRANDI NAVI & TRASMEDITERRANEA

Barcelona → Livorno a través de GRIMALDI & FLOTA SUARDIAZ

Alta Frecuencia  Fachada Cantábrica

Internet | Modo protegido





# SPC – Spain Transport chains Simulator

Simulador de Cadenas ...

Documentacion

Grupos de Trabajo



Nombre de usuario

Contraseña

Recordarme

Iniciar sesión

SPC Spain es miembro de la Red Europea de Shortsea Shipping



European Shortsea Network

### Opciones adicionales para el tramo marítimo en las cadenas que usan el TMCD

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Alta Frecuencia  Fachada Cantábrica

Fachada Atlántica  Fachada Mediterránea

Resultados ordenados por:  Coste  Tiempo  Distancia



### Transporte por carretera

Origen	Destino	Coste (Eur)	Tiempo (Horas)	Distancia (Km)
valladolid	hannover	2.108	64,7	1.916

### Transporte Intermodal con líneas marítimas existentes.

	ORIGEN - DESTINO	Coste (Eur)	Tiempo (Horas)	Distancia (Km)
+	Bilbao ** Ambers	1.930	89,9	2.163
+	Bilbao ** Zeebrugge	1.942	77,4	2.125





Transporte por carretera

Trayecto	Coste (Eur)	Tiempo (Horas)	Distancia (Km)
valladolid --> hannover	2.108	64,7	1.916

Transporte marítimo

Trayecto	Coste (Eur)	Tiempo (Horas)	Distancia (Km)
valladolid --> Bilbao	308	4,3	280
Bilbao --> Zeebrugge	987	64,0	1.306
Zeebrugge --> hannover	648	9,1	540
<b>Total: valladolid *** hannover</b>	<b>1.942</b>	<b>77,4</b>	<b>2.125</b>

El coste del transporte marítimo es orientativo, para mayor precisión por favor consulte a la naviera.

[Información sobre el Puerto de Origen: Puerto de Bilbao.](#)

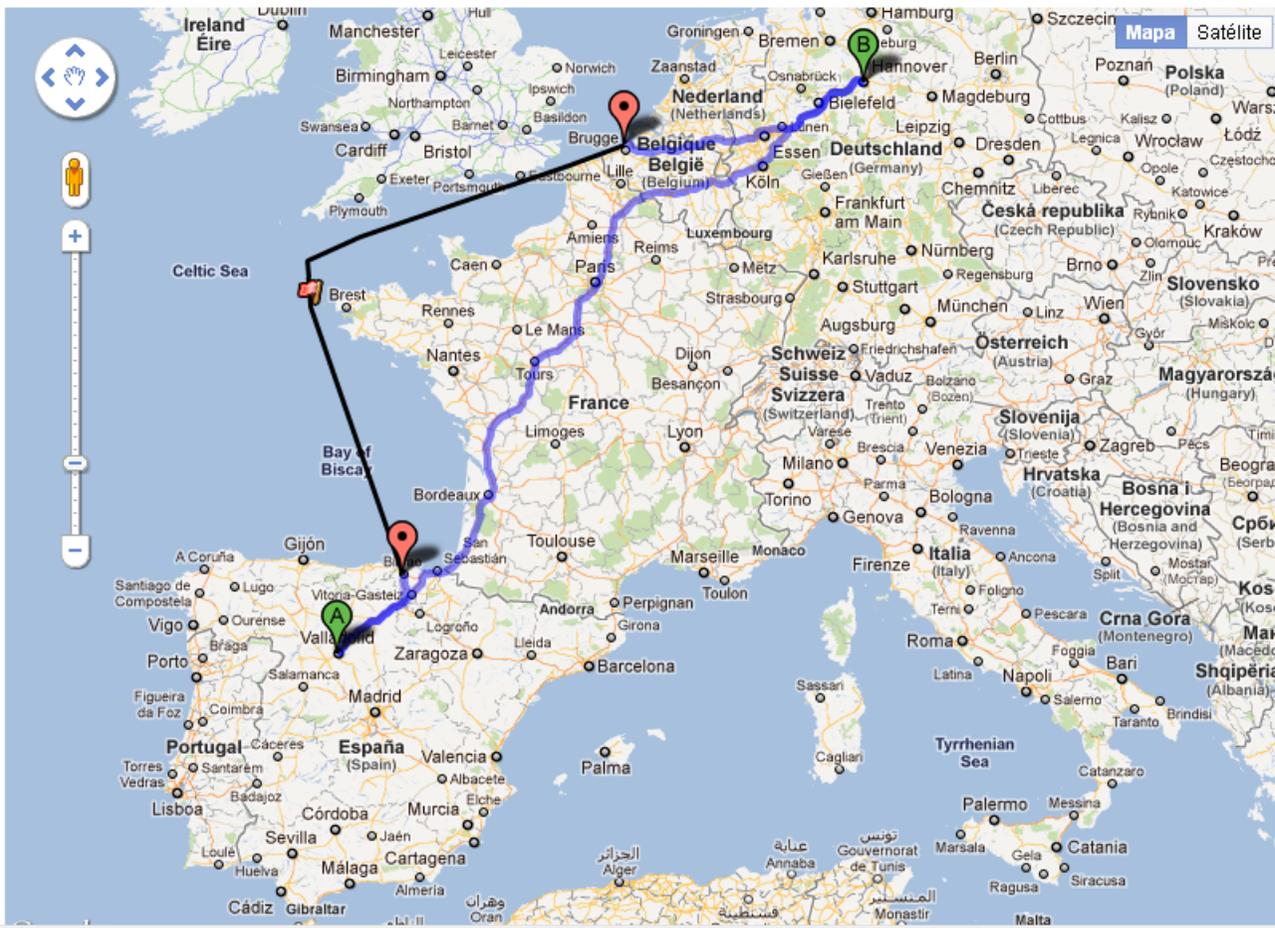
[Información sobre la Naviera y el Servicio Marítimo.](#)

[Información sobre el Puerto de Destino: Puerto de Zeebrugge.](#)

Selecciona la línea marítima:

Bilbao-Zeebrugge a través de TRANSFENNICA

Nueva Simulación





Ver ficha Naviera



## SHORTSEA Promotion centre SPAIN



**Datos de contacto**

**TRANSFENNICA**  
Página Web: [www.transfennica.com](http://www.transfennica.com)  
Agencias en España: Transfennica Iberia

De **Bilbao** ↔ a **Zeebrugge**

**Horario**

Lunes 17:00 -> Miércoles 09:00  
Miércoles 17:00 -> Viernes 09:00  
Viernes 17:00 -> Lunes 06:00

Lunes 17:00 <- Miércoles 09:00  
Miércoles 17:00 <- Viernes 09:00  
Viernes 21:00 <- Lunes 06:00

**Información y reservas**

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Listo





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