MEDA City Forum

Businesses and Cities of the Mediterranean

Engines of Innovation, Cohesion and Peace

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Port Development and Urban Mobility in the Mediterranean

The evolving landscape of Ports and Future Perspectives

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The current global context and its impact on the maritime economy

The regionalisation of globalisation

Notwithstanding regionalization, the US, EU, China, ASEAN and India still maintaining high levels of **mutual interdependence**.

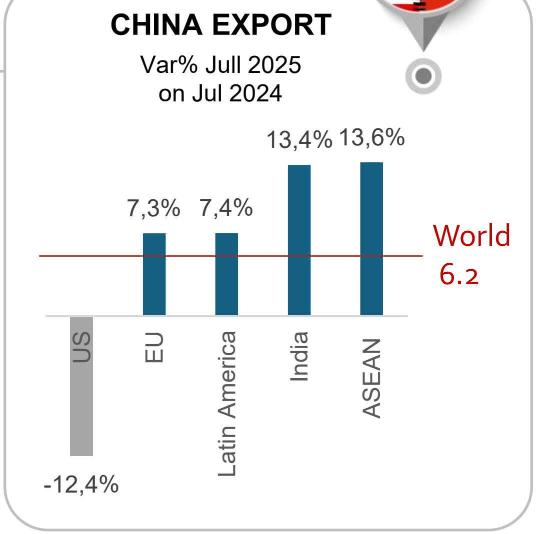
Decoupling

Direct trade traffic between China and the US decline while **indirect flows** through ASEAN countries and from China to Europe and the Gulf **increase.**

Regional container routes between

2021 and 2026 grow by **7.3%**
(average for all routes: **6.1%).**

Intra-Asia traffic growth: 8.5%.



Source: SRM on China Customs

Trends in trade

Manufacturing trade is mostly by **containers**, but maritime trade is made up of a wide variety of sectors such as raw materials, energy, cereals and agricultural produce which employ other types of vessels.

As for **Tourism**, the role of cruise ships must be considered.

We need to see the bigger picture

Shipbuilding

The Ships for AMERICA ACT is aimed at boosting the US shipbuilding sector. Starting from 14th October, ships built in China or with China Flag calling at US ports will be subject to a toll per net ton which will gradually rise in 2028.

This Act is also intended to revamp the US LNG and Car Carrier sectors.

From Crossroads to Powerhouse: the strategic role of the Mediterranean in Global Maritime Trade

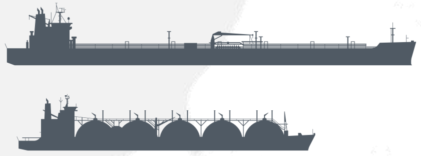
The Mediterranean at the crossroads between the EU, Asia and Africa

Suez remains strategic for trade with Asia, like **Gibraltar** for routes to the US and the Atlantic. Growing role of ports and SEZs.

62 million TEUs in 2024, up 5.1% from 2023.

Energy

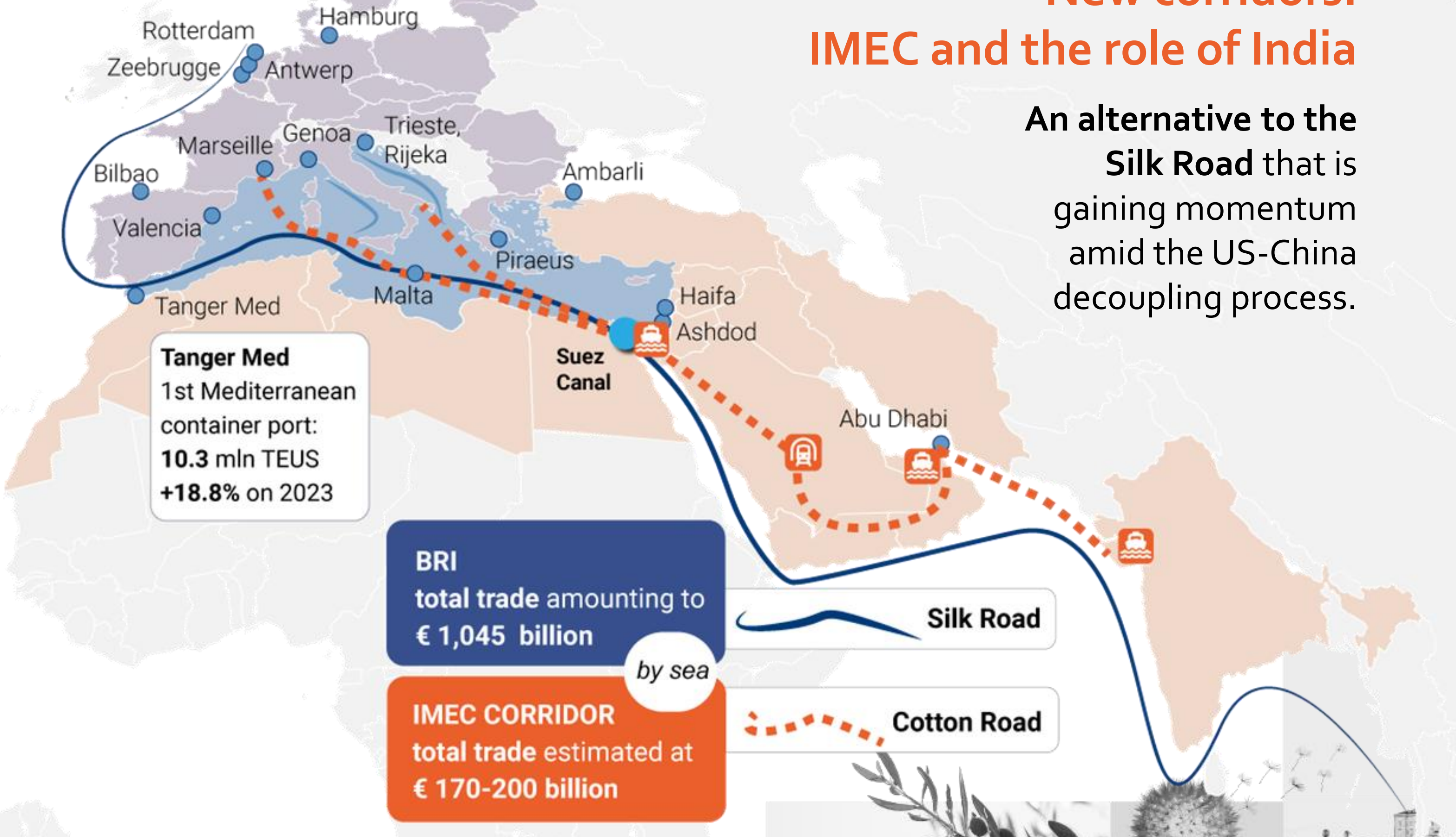
30% of global oil and gas passes through the **Mediterranean.**



(Over 1 billion tonnes per year)

New corridors: IMEC and the role of India

An alternative to the Silk Road that is gaining momentum amid the US-China decoupling process.



Source: SRM on various data

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What's at Stake in Maritime Competition and how to gain a prominent position

The role of major carriers

vertical and horizontal integration, and vessel gigantism

Shipbuilding and national fleets

the EU and Asia take the lead; the US less so, but note the *Ships for America Act*

Control of port terminals and inland distribution

focus on routes serving key markets. The Mediterranean remains strategic for the future

Logistics, urban mobility, digitalisation, and sustainability

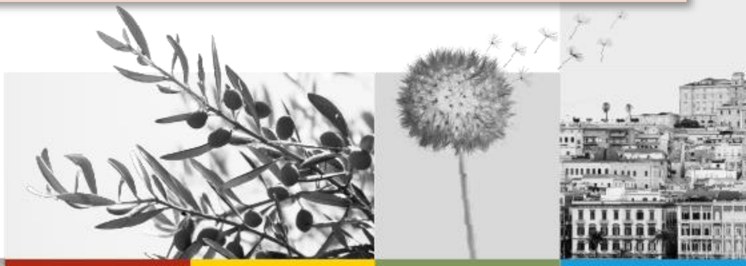
as drivers of port competitiveness

Free Zones

ports and terminals as hubs for industrial development

Ports as energy hubs

the new frontier



Port models have an impact on urban development wider than in the past

INTERNATIONALISATION

Department for internal development

Monitoring for international trade

INTERMODALITY

Department for intermodal traffic

Local transport network

Monitoring of transport phenomena

TRAINING & ACADEMY

Relation with universities and research centres

Proper use and application of AI

Database and clouds

INNOVATION &START-UPs

Incentives

Specialised expertise

Drones and security

FREE ZONES & TERRITORIAL MARKET

Financial & bureaucratic incentives

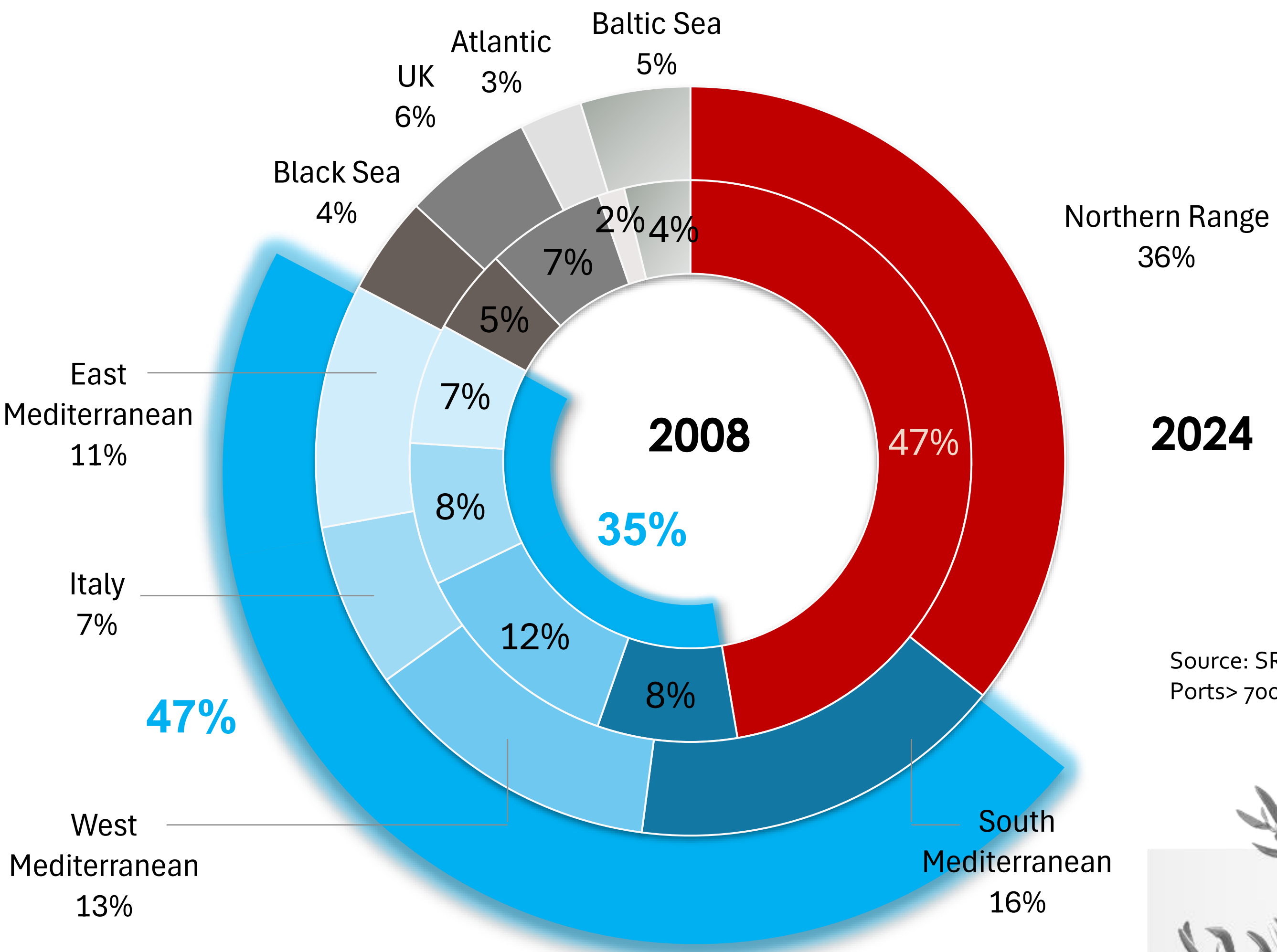
Plan for territorial development

SUSTAINABILITY

Creating economic and social value

Container ports in the Mediterranean: years of significant development

The Mediterranean increased its market share from **35%** in 2008 to **47%** in 2024, while the Northern Range contracted.



Source: SRM on Port Authorities
Ports> 700,000 TEUs

Conclusions

Pivotal Mediterranean

Regionalization, protectionism, and geopolitics further increase the importance of the Mediterranean — the only area connecting the Atlantic, Europe, and Asia — a role strengthened by the search for new corridors (e.g. IMEC).

Intermodality

Ports play a full role if there is connectivity. Integration between port development and sustainable mobility is the main policy element to focus on.

Growing Competition

Maritime competition revolves around major carriers, shipbuilding, and the role of ports when they operate at the **intersection of three key dimensions: logistics, energy, and the attraction of new industrial investments**.

Main Players

Europe and **Asia lead at sea**,
but the **US** is looking **to catch up**.

The Mediterranean: More than Geography

The sea is a **pillar of the economy**, but competitiveness must be regained.

All countries must increase investment in port efficiency, free zones, and in developing ports as intermodal hubs.