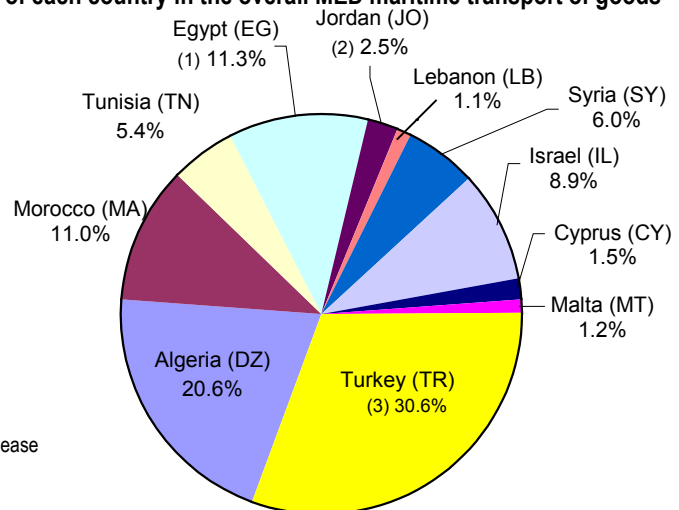


Maritime Transport in the MED Countries, 2000

An increase of 13% in the transport of goods since 1998

Georgios Xenellis

Figure 1: Share of each country in the overall MED maritime transport of goods



NB: For footnotes, please refer to Table 1.

Highlights

With 58 major ports the overall tonnage of cargo loaded and unloaded in the MED region reached 487 million tonnes in 2000, increasing by 12.8% since 1998. Most countries experienced positive average annual growth rates, the outstanding performances being in Malta (16%) and Turkey (11%). However, Lebanon suffered a decrease (-5.5%) and Jordan's maritime economy remained stable (-0.5%).

The 15 biggest ports in the region achieved freight turnovers of well over 11 million tonnes each. Bethioua in Algeria handled the largest quantity of maritime cargo reaching 36.4 million tonnes in 2000, followed by Izmit in Turkey with 31.4 million tonnes and Alexandria in Egypt with 28.4 million tonnes. The largest MED port would feature at the 15th position in a EU-MED list.

The EU ranks as by far the largest maritime partner for a number of MED countries, and particularly for the Maghreb region. The share of cargo to and from the EU and other European countries reaches about 60% for at least five MED partners.

Maritime passenger transport is limited mostly to Egypt, the Maghreb region and Turkey, but the cruise industry is gaining importance in the Mediterranean region and it is significant not only for countries like Cyprus and Malta but also for other tourist destinations.

General Developments

Maritime transport is an important part of the economy in eleven of the twelve south and eastern Mediterranean countries (the MED countries - see methodological notes)¹. The largest part of the external trade of these countries goes by sea and, at least in terms of volume, maritime transport dominates in the exchange of goods between the MED and the EU. In 2000 about 146 million tonnes of goods worth 78 billion Euro were exported and imported by the EU to/from MED countries by sea. In terms of tonnages, maritime transport represents about 74% of the total quantities exchanged and in terms of value about 51%.

¹⁾ The only exception is the Palestinian Territories where, due to the on-going Middle East conflict, the port in Gaza is not operating.

Statistics in focus

TRANSPORT

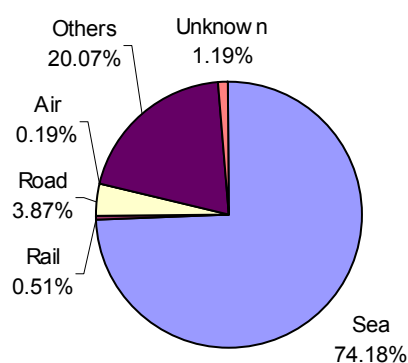
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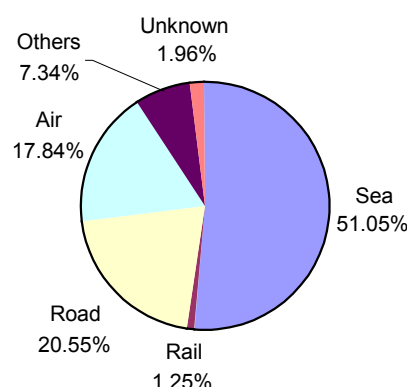


Figure 2: EU external trade with MED countries in tonnes by mode of transport, 2000



The MED region has 58 major ports (i.e., ports handling over 1 million tonnes of goods per year), of which 17 are in Turkey, 8 in Algeria and 8 in Morocco. In Lebanon and in Jordan there is only one major port. The overall tonnage of cargo loaded and unloaded in the major MED ports reached 487 million tonnes in 2000, increasing by 12.8% since 1998. Rapid growth in goods carried by sea has been recorded by most of the MED countries in the last few years. Particularly remarkable increases occurred in Malta (35%) and in Turkey (23%); the exceptions being Lebanon with a drop of 11% and Jordan where the cargo volume remained practically

Figure 3: EU external trade with MED countries in value by mode of transport, 2000



unchanged.

With a turnover of about 150 million tonnes Turkish ports account alone for close to one third of the total MED maritime trade, followed by Algeria (100 million), Egypt (55 million) and Morocco (53 million). These volumes are similar to those achieved by EU countries like Denmark, Finland and Portugal, with respectively 97 million, 81 million and 56 million tonnes in 2000, but they are smaller than the leading EU countries in maritime transport, such as the United Kingdom, Italy, the Netherlands and France with tonnages ranging from 573 million to 337 million tonnes.

Table 1: Total maritime transport of goods in the main MED ports (in thousand tonnes)

	1998	1999	2000	Variation 1998-2000 (%)	Average annual growth (%)
Algeria (DZ)	91 432	94 474	100 301	9.70	4.74
Morocco (MA)	48 212	52 872	53 444	10.85	5.29
Tunisia (TN)	23 567	25 331	26 104	10.77	5.24
Egypt (EG) ⁽¹⁾	49 408	54 110	54 777	10.87	5.29
Jordan (JO) ⁽²⁾	12 487	12 835	12 358	-1.03	-0.52
Lebanon (LB)	6 216	6 248	5 547	-10.78	-5.54
Syria (SY)	27 622	28 846	28 959	4.84	2.39
Israel (IL)	40 759	41 866	43 062	5.65	2.79
Cyprus (CY)	6 443	7 037	7 281	13.00	6.30
Malta (MT)	4 223	4 299	5 711	35.22	16.28
Turkey (TR) ⁽³⁾	121 160	128 938	149 029	23.00	10.91
Total MED	431 529	456 857	486 572	12.76	6.19

⁽¹⁾ Unless otherwise stated, data for Egypt in this and other tables was provided by the EMDB and the tare weight of containers is included.

⁽²⁾ The weight of empty containers is excluded

⁽³⁾ Unless otherwise stated, data for Turkey excludes transit traffic

Inwards and outwards tonnage

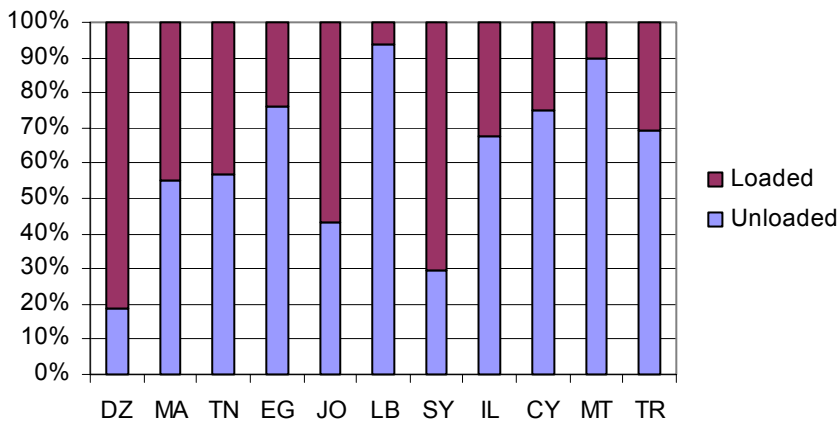
The pattern of maritime transport in the region shows a considerable imbalance in port activity as some MED countries mostly unload cargo while others mostly load it. In Algeria and Syria, where crude oil and petroleum products represent an important share of commodities transported by sea, the volume of cargo loaded is respectively 4.4 and 2.4 times greater than the volume of goods unloaded. The

opposite holds for Lebanon where the ratio between unloaded and loaded cargo was about 15 to 1 in 2000, with over 5 million tonnes of goods imported by sea as compared to a mere 352 thousand tonnes exported. Similarly, in Malta, Egypt, Israel and Turkey, the flows of cargo unloaded ranged from 9 to 2 times more in terms of weight than the quantities loaded.

Table 2: Gross weight of goods loaded and unloaded in the main MED ports (in thousand tonnes), 2000

Country	2000			Loaded over unloaded	Major port		n° ports > 1 mln tonnes per year
	Total	Unloaded	Loaded		Name	1000 tonnes	
Algeria (DZ)	100 301	18 529	81 772	4.41	Bethioua	36 371	8
Morocco (MA)	53 444	29 560	23 884	0.81	Casablanca	19 773	8
Tunisia (TN)	26 104	14 895	11 209	0.75	Sfax	5 411	5
Egypt (EG)	54 777	41 713	13 064	0.31	Alexandria and Dehkelia	28 404	6
Jordan (JO)	12 358	5 359	6 999	1.31	Aqaba	12 358	1
Lebanon (LB)	5 547	5 195	352	0.07	Beirut	4 921	1
Syria (SY)	28 959	8 521	20 438	2.40	Banias	16 865	3
Israel (IL)	43 062	29 196	13 866	0.47	Haifa	18 534	4
Cyprus (CY)	7 281	5 475	1 805	0.33	Limassol	3 037	3
Malta (MT)	5 711	5 134	577	0.11	Marsaxlokk	2 893	2
Turkey (TR)	149 029	103 707	45 322	0.44	Izmit	31 419	17

Figure 4: Share of loaded and unloaded goods by MED country, 2000



The top-15 ports in the MED region on the basis of the gross weight of goods

The 15 biggest ports in the MED region achieved freight turnovers of well over 11 million tonnes each. The top-15 list includes three Algerian ports, five Turkish ports, two Egyptian ports and two Israeli ports. A Syrian, a Moroccan and the Jordanian port also appear, but there are no Lebanese, Tunisian, Maltese or Cypriot ports represented.

The top-3 performances were achieved by the ports of Bethioua in Algeria (36 million tonnes), of Izmit in Turkey (31 million tonnes) and of Alexandria in Egypt (28 million tonnes). In a EU-MED list of biggest ports on the basis of the gross weight of goods handled, the first MED port would compete with Bremen/Bremerhaven for the 15th position.

Table 3: Top-15 ports in terms of the gross weight of goods handled in the MED and EU, 2000

No.	MED Ports	1000 tonnes	EU Ports	1000 tonnes
1	Bethioua / DZ	36 371	Rotterdam / NL	302 485
2	Izmit / TR	31 419	Antwerpen / B	115 988
3	Alexandria (incl. Dekhelia) / EG	28 404	Marseille / FR	91 279
4	Skikda / DZ	24 715	Hamburg / D	76 950
5	Aliaga / TR	24 598	Le Havre / FR	63 883
6	Casablanca / MA	19 773	Grimsby & Immingham / UK	52 501
7	Haifa / IL	18 534	Tees & Hartlepool / UK	51 472
8	Istanbul / TR	17 469	London / UK	47 892
9	Banias / SY	16 865	Dunkerque / FR	44 318
10	Ashdod / IL	15 758	Trieste / IT	44 015
11	Damietta / EG	13 004	Genova / IT	43 797
12	Mersin / TR	12 842	Wilhelmshaven / D	43 402
13	Aqaba / JO	12 358	Amsterdam / NL	42 044
14	Arzew / DZ	12 176	Forth / UK	41 143
15	Iskenderun, Hatay / TR	11 820	Bremen/Bremerhaven / D	39 224

Main type of cargo handled

The great majority of maritime activity in the MED countries is related to bulk cargo and this strongly characterizes the flows, the vessels and equipment available in the harbours. Algeria hosts three of the biggest oil terminals in the region (Bethioua, Skikda and Arzew) which contribute to the 82% share of liquid bulk in its maritime economy. The same occurs in Syria where over 56% of maritime transport is concentrated in the port of Baniyas, once more an oil port. Liquid bulk is also predominant in Turkey where 58 million tonnes were handled accounting for a share of 39% of the total maritime tonnage. A further 27% of the overall activity of Turkish ports is dry bulk, of which solid mineral fuels, iron ore and cement are some of the major categories.

Dry bulk is the largest cargo type handled in Jordan's sole port Aqaba (69%), characterized by the carriage of over 6 million tonnes of fertilizers in 2000. In the Israeli ports, where agricultural products and solid mineral fuels are predominant,

dry bulk is again the major cargo category (48%), also thanks to the specialized terminal in Hadera that imports close to 7 million tonnes of coal per year. Morocco features 55% of traffic in dry bulk (mostly fertilizers, cereals and crude and manufactured minerals) and 28% in liquid bulk (generally petroleum and chemicals). In the major Egyptian ports, dry bulk accounts for 41% of the goods handled.

The Israeli and Cypriot ports stand out for their higher rate of unitised transport loads. About 30% of the total tonnage in Israel was transported in containers. About 26% of the gross weight of goods handled in Limassol and Larnaca is carried by container and ro-ro units. Nevertheless, in Cyprus liquid bulk still represents 43% of the total cargo. Although no figures are available here, the Freeport of Marsaxlokk in Malta is notable for container and ro-ro cargo as it is a leading transshipment platform in the Mediterranean Sea.

Table 4: Maritime transport by country and major cargo types (in thousands of tonnes), 2000

Type of cargo	Algeria DZ ⁽¹⁾	Cyprus CY	Israel IL	Jordan JO	Morocco MA ⁽²⁾	Turkey TR	Egypt EG ⁽³⁾
Liquid bulk	82 410	3 095	5 394	393	14 526	58 092	7 281
Dry bulk	10 085	1 845	20 538	8 553	28 699	39 740	22 449
Container and Ro-Ro		1 866	13 125	134	3 764	13 940	
Other cargo	7 805	473	4 005	3 216	3 503	37 046	16 111
Not Classified		1	0	62	1 454	212	8 936
Total	100 301	7 281	43 062	12 358	51 946	149 029	54 777

⁽¹⁾ For Algeria, "other cargo" includes tonnage transported by containers and ro-ro units.

⁽²⁾ The difference with the total figure from table 1 is due to the fact that here Tangier port reports the gross weight of goods (excluding the tare of containers and ro-ro units).

⁽³⁾ For Egypt the category "Not Classified" refers to the transit goods that were not reported by type of cargo.

Figure 5: Shares of the major maritime cargo types by country, 2000

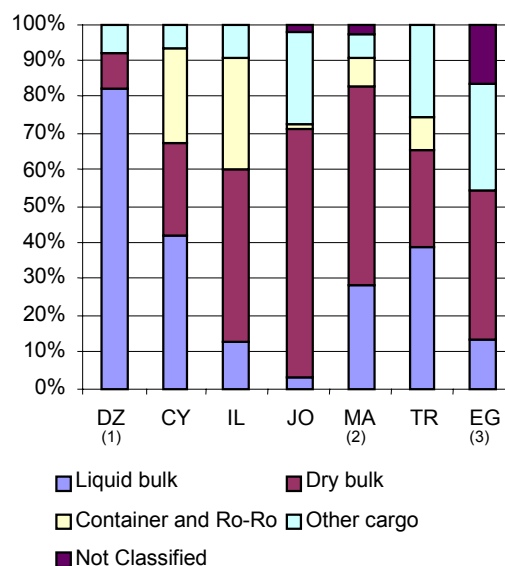
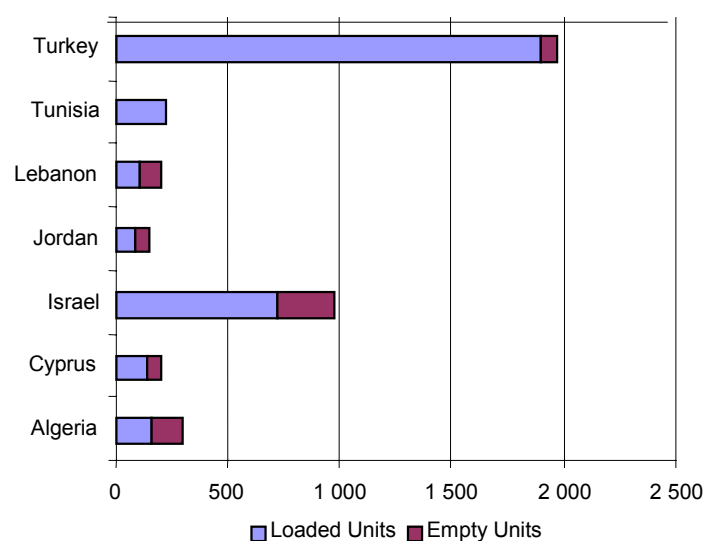


Figure 6: Container and ro-ro transport by country (in thousand units), 2000



Although still limited in most MED ports, container and ro-ro transport is growing at a steady rate. In Turkey the number of units handled increased from 1.7 million in 1998 to about 2 million in 2000 (+18.8%). In the same period Algeria reported a 30.3% increase in the number of units, Cyprus 28.4%, Israel 20.7%, and Jordan 21.3%. Only Lebanon suffered a drop from 229 thousand units in 1998 to 207 thousand in 2000 (-9.5%). Empty units play an important role in Algeria where they represented 45.8% of the total unit-load traffic in 2000, as well as in Jordan (40.3%) and in Lebanon (46.7%). In 2000 the average tonnes of goods carried in a container or ro-ro unit varied from 8.28 in Israeli ports to 1.42 in the port of Beirut (Lebanon).

Table 5: Main commodity groups in maritime transport by country (in thousands of tonnes), 2000

Code	GOODSTYPE	Algeria (DZ)	Israel (IL)	Jordan (JO)	Lebanon (LB) (1)	Morocco (MA) (2)	Syria (SY)	Tunisia (TN)	Turkey (TR)
G01	CEREALS	7 611		1 707	501	5 465	1 678	2 699	4 416
G02	VEGETABLES	164	9 012	4	47	417		124	489
G03	LIVE ANIMALS, SUGAR BEET	6		30	141	60		2	
G04	WOOD AND CORK	625			66	107	316	386	1 244
G05	TEXTILES, TEXTILE ARTICLES AND MAN-MADE FIBRES, OTHER								
G05	RAW ANIMAL AND VEGETABLE MATERIALS	25			5	58	467	14	133
G06	FOODSTUFFS AND ANIMAL FODDER	1 212		506	177	1 774	916	735	1 694
G07	OIL SEEDS AND OLEAGINOUS FRUITS AND FATS	529		184	70	249	43	341	2 022
G08	SOLID MINERAL FUELS	563	6 971		4	3 635		119	12 941
G09	CRUDE PETROLEUM	36 141	718					5 667	24 621
G10	PETROLEUM PRODUCTS	45 532	3 826	43	1 494	9 792	20 486	4 457	30 910
G11	IRON ORE, IRON AND STEEL WASTE AND BLAST FURNACE DUST	1 476		376	610	16	1 179	975	12 002
G12	NON-FERROUS ORES AND WASTE	30				318		290	1 860
G13	METAL PRODUCTS	488	1 672			568		117	14 372
G14	CEMENT, LIME, MANUFACTURED BUILDING MINERALS	831		354	184	138	17	373	8 206
G15	CRUDE AND MANUFACTURED MINERALS	19		638	0	3 755		2 015	7 775
G16	NATURAL AND CHEMICAL FERTILIZERS	1 210		6 164	0	12 084	1 043	1 842	4 227
G17	COAL CHEMICALS, TAR	16	2 930						755
G18	CHEMICALS OTHER THAN COAL CHEMICALS AND TAR	623			172	3 024	694	2 343	4 534
G19	PAPER PULP AND WASTE PAPER		177		99	198	153	166	268
G20	TRANSPORT EQUIPEMENT, MACHINERY, APPARATUS, ENGINES, WHETHER OR NOT ASSEMBLED, AND PARTS THEREOF	345		93	77		422	270	80
G21	MANUFACTURES OF METAL							66	119
G22	GLASS, GLASSWARE, CERAMIC PRODUCTS	25			37	12		129	180
G23	LEATHER, TEXTILE, CLOTHING, OTHER MANUFACTURED ARTICLES	6			16	82	7	423	683
G24	MISCELLANEOUS ARTICLES	2 823	17 756	117	1 220	4 078	2 398	661	15 498
G88	NOT CLASSIFIED			2 248		6 118	10	1 890	
	TOTAL	103 301	43 062	12 358	4 920	51 946	29 829	26 104	149 029

(1) Lebanon data refers only to the Port of Beirut.

(2) The difference with the total figure from table 1 is due to the fact that here the port of Tangier reports the gross weight of goods (excluding the tare of containers and ro-ro units).

Table 6: Container and ro-ro transport by country, 1998-2000

Country		Year			Variation (1998-2000 %)
		1998	1999	2000	
Algeria	Total number of units	231 042	270 742	301 130	30.34
	Number of empty units	98 985	125 203	137 918	
Cyprus	Total number of units	158 664	205 955	203 752	28.42
	Number of empty units	55 870	41 855	58 740	
Israel	Total number of units	808 000	1 365 608	975 000	20.67
	Number of empty units	238 000	231 000	250 000	
Jordan	Total number of units	124 661	135 772	151 160	21.26
	Number of empty units	49 635	54 892	60 909	
Lebanon	Total number of units	228 645	210 147	206 946	-9.49
	Number of empty units	105 759	94 798	96 568	
Tunisia *	Total number of units	173 746	214 693	230 671	32.76
	Number of empty units	68 567	85 184	81 275	
Turkey	Total number of units	1 680 448	1 478 966	1 996 999	18.84
	Number of empty units	164 970	140 279	68 693	

* Total number of units refer to TEU; empty units exclude ro-ro; gross weight of goods include ro-ro.

TEU (Twenty-foot Equivalent Unit): Standard unit for counting containers of various capacities and for describing the capacities of container ships or terminals. One 20 Foot ISO container equals 1 TEU.

Transport of goods by geographical areas

The available statistics allow for a geographical analysis of the main maritime corridors with some of the MED countries. The EU ranks as by far the largest maritime partner for a number of countries, and particularly for the Maghreb region. In 2000 over 9.4 million tonnes were carried by sea between Tunisia and the EU. The figure was close to 6 million tonnes for Algeria, 2.8 million for Turkey, 2 million for Lebanon and 1.6 million for Cyprus largest port (Limassol). In terms of share of maritime transport for these countries, the EU represents 58.6% of the total for Algeria, 53.8% for the port of Limassol in Cyprus (more if Larnaca was also to be taken

into account), and 42.6% for Lebanon. Including cargo to and from non-EU European countries, these shares often soar to more than 60%. This holds for Turkey as well, although the EU share here is 18.5% while other European countries account for 44.3%. A notable exception to this general pattern is Jordan, the only MED country that does not have access to the Mediterranean Sea. Aqaba port lies on the Red Sea, a position which privileges maritime cargo exchange with ports in Asia, the Far East and Australia (51.5%), while goods carried by sea to or from the EU represent only 12.9%.

Figures 7: Maritime transport flows by country and geographical area, 2000

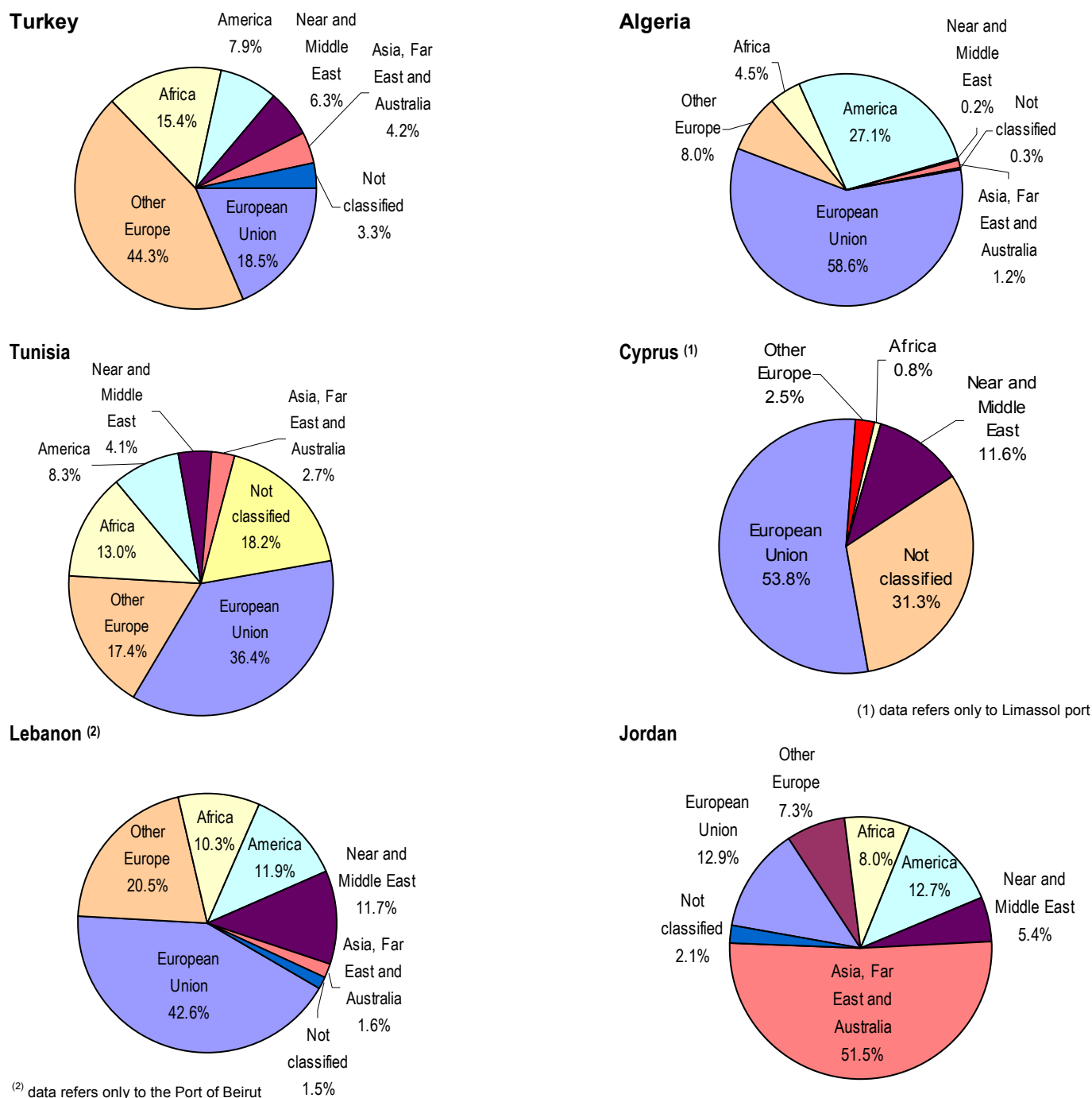


Table 7: Maritime transport flows by country and geographical area (in thousand tonnes), 2000

Geographical area	Algeria (DZ)	Tunisia (TN)	Cyprus (CY) (1)	Lebanon (LB) (2)	Jordan (JO)	Turkey (TR)
European Union	58 778	9 494	1 634	2 097	1 596	27 611
Other Europe	8 071	4 535	75	1 008	907	66 021
Africa	4 555	3 395	26	505	994	22 964
America	27 200	2 162	0	586	1 564	11 828
Near and Middle East	242	1 082	352	576	687	9 419
Asia, Far East and Australia	1 204	694	0	77	6 363	6 251
Not classified	251	4 742	950	72	247	4 935
Total	100 301	26 104	3 037	4 921	12 358	149 029

* The figures in this table include domestic transport.

(1) data only refer to the port of Limassol.

(2) data only refer to the Port of Beirut.

Transport of passengers

Maritime passenger transport (excluding transportation performed in sheltered waters) is a much smaller activity, limited mostly to Egypt, the Maghreb region and Turkey. However the cruise industry is gaining importance in the Mediterranean region and cruise passengers are an important business, not only for countries like Cyprus and

Malta, but also for other tourist destinations in Israel, Tunisia, Morocco and in some Turkish ports. According to the available data, in 2000 close to 3 million passengers were embarked/disembarked in the major Egyptian ports, about 2.7 million in Morocco and 1.2 million in Turkey. The 800 thousand passengers visiting Cyprus are all on cruises.

Table 8: Passenger transport by country, 2000

	Number of passengers	Cruise passengers (begin/end cruise)	Cruise passengers (cruise stage - transit passengers)
Algeria (DZ)	587 247	-	-
Morocco (MA)	2 668 392	:	41 667
Tunisia (TN)	414 222	:	191 922
Egypt (EG)	2 931 325	:	:
Jordan (JO)	638 542	:	:
Lebanon (LB)	46 001	:	:
Syria (SY)	30 711	:	:
Israel (IL)	158 000	-	536 000
Cyprus (CY)	-	604 646	217 817
Malta (MT)	210 650	6 216	167 810
Turkey (TR)	1 242 639	:	:

Note: Cruise stage passengers are counted only once.

► DEFINITIONS AND METHODOLOGICAL ISSUES

The content of this "Statistics in Focus" is mainly based on the data collected within the framework of the MEDSTAT/MED-Trans project, thanks to the co-operation of the twelve MED partner countries (DZ-Algeria, MA-Morocco, TN-Tunisia, EG-Egypt, JO-Jordan, LB-Lebanon, SY-Syria, IL-Israel, PS-Palestinian Territories, CY-Cyprus, MT-Malta, TR-Turkey).

The EU indicators are calculated on the basis of Eurostat's regular collection of data from EU Member States. The source of the data on external trade is the Comext database.

All data is available in Eurostat's New Cronos database Data, figures and text: Aline Pennisi – Layout: Marie-Anne Delisé.

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➤ Databases

New Cronos,
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