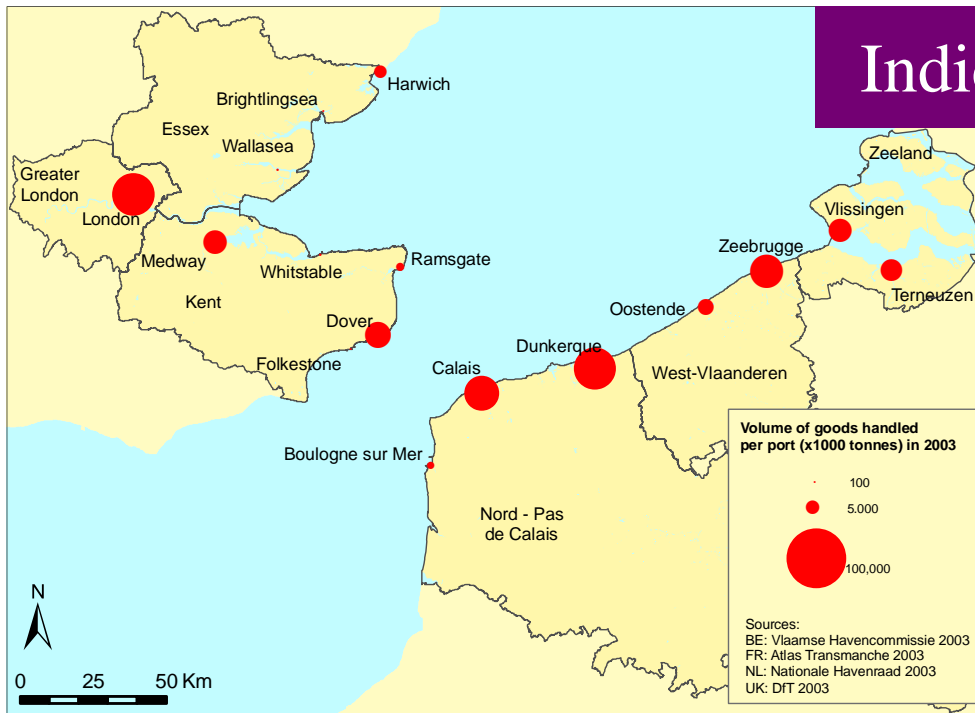
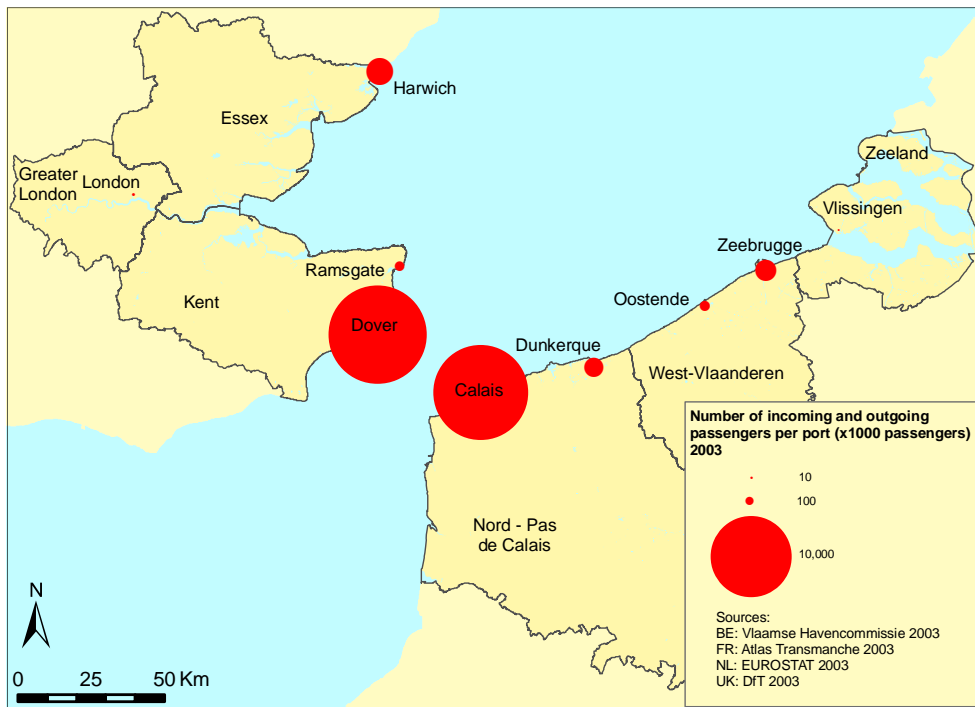
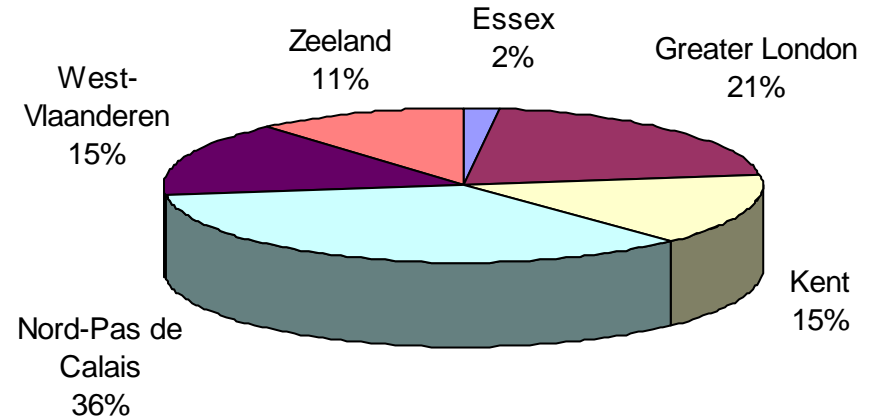


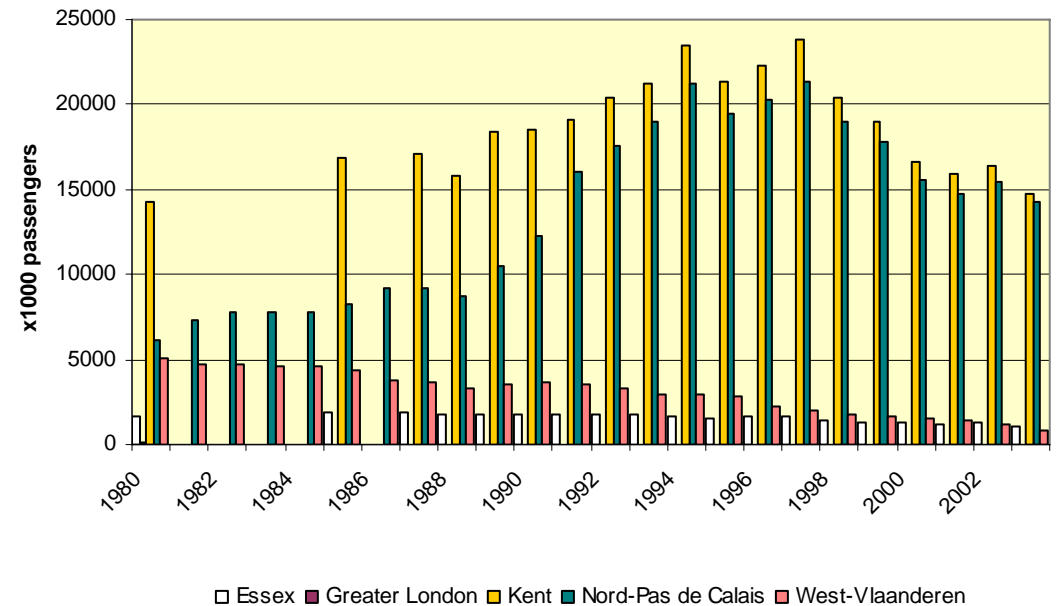
Indicator 10 Economic importance of ports



Share of total volume of goods handled in ports of the SAIL sub-regions (2003)



Number of passengers in ports of the SAIL sub-regions (1980-2003)



- *Number of incoming and outgoing passengers per port*
- *Proportion of goods carried cross-channel by rail and by truck*
- *Proportion of goods carried by short sea routes*
- *Volume of goods handled per port*
- *Direct added value of ports*

Key Message

- The total volume of goods handled in ports of the Southern North Sea region has increased by more than 60% over the last twenty years. In 2003, about 250 million tonnes were handled by SAIL ports.
- In spite of the increase in transport by rail (absolute numbers) through the Channel, the proportional importance of truck freight has grown slightly since 1994.
- The ports of Calais and Dover account for the largest share of passenger transport in the Southern North Sea (92% in 2003). Since the opening of the Channel tunnel in 1997, passenger numbers on the Channel link between these two ports have dropped by more than 20%.

Why monitor the economic importance of ports?

Ports constitute an important economic activity in coastal areas. The higher the throughput of goods and passengers year-on-year, the more infrastructure, provisions and associated services are required. These will bring varying degrees of benefit or disadvantage to the local and regional economy and to the environment. Ports are also important for the support of economic activities in the hinterland since they act as a crucial connection between sea and land transport.

As a supplier of jobs, ports do not only serve an economic but also a social function. However, since cargo nowadays is loaded and unloaded mechanically, the effects of changes in the amount of goods handled on local employment or the demand for port services is difficult to ascertain.

Transport is one of the main sources of NO_x and SO_x and greenhouse gases giving rise to air pollution that can seriously damage ecosystems and public

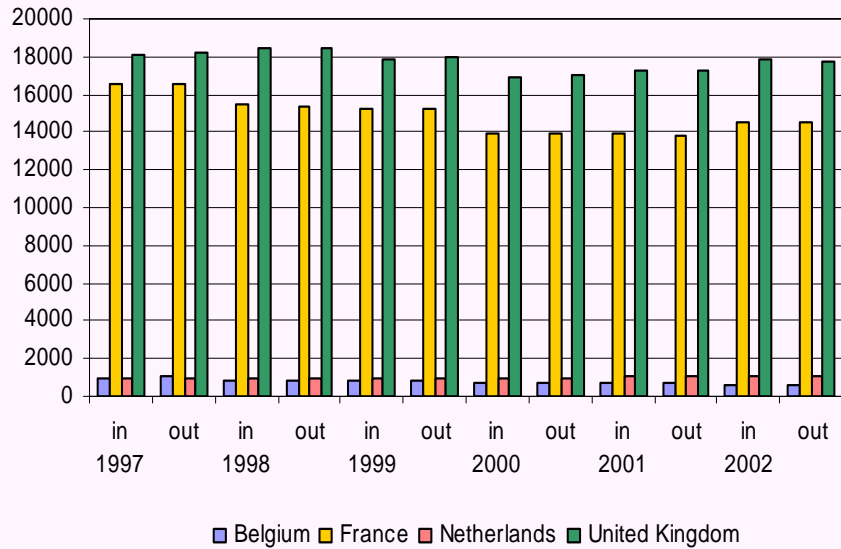
health. The European institutions as well as individual countries have promoted short sea routes heavily over the past twenty years or so, largely because of the environmental advantages of conveying goods by sea rather than by air or road. In those sectors where it competes directly with other means of transport, shipping is by far the most energy efficient form of transport. The indicator helps to understand developments in the freight and passenger transport sectors in response to sectoral policies for sustainable transport and development. The indicator can also be related to trends observed in the impact of transport on the environment. Measurements of this indicator should help us to gain an insight into the vitality of ports and to compare them in terms of (economic) importance.

Where do the data come from?

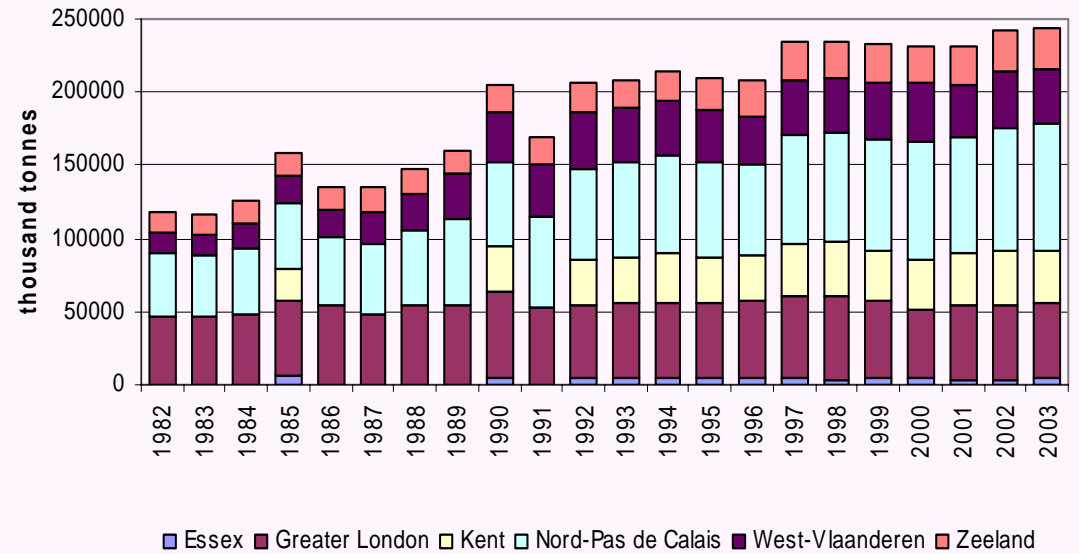
Since 2000, maritime traffic data have been collected on a uniform basis by Member States in accordance with the EU Maritime Statistics Directive (95/64/EC). Member States are required to provide information about goods and passengers moving in and out of European ports. Annual data on the throughput of goods are available for all cargo ports. More details are available for ports handling goods in excess of one million tonnes per year, including type of vessel and type of cargo carried. For passenger ports with less than 200,000 movements, details are not provided.



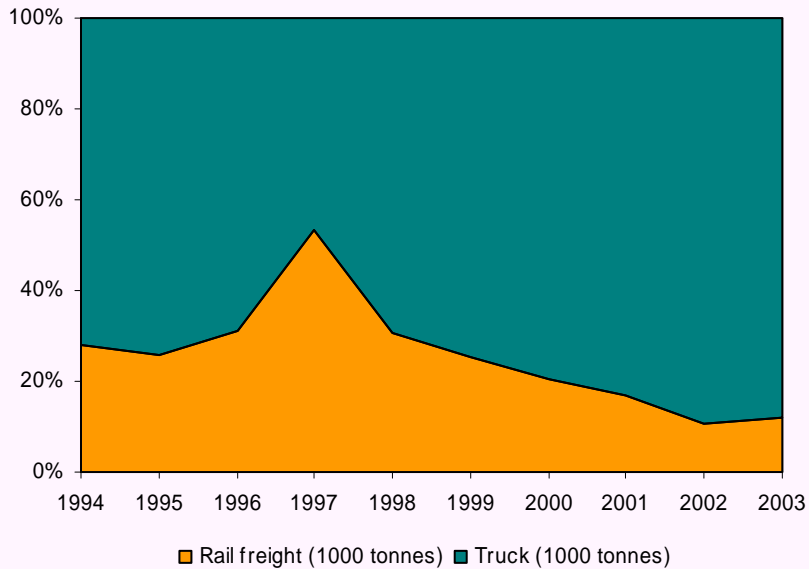
Incoming and outgoing passenger transport in ports of the SAIL countries



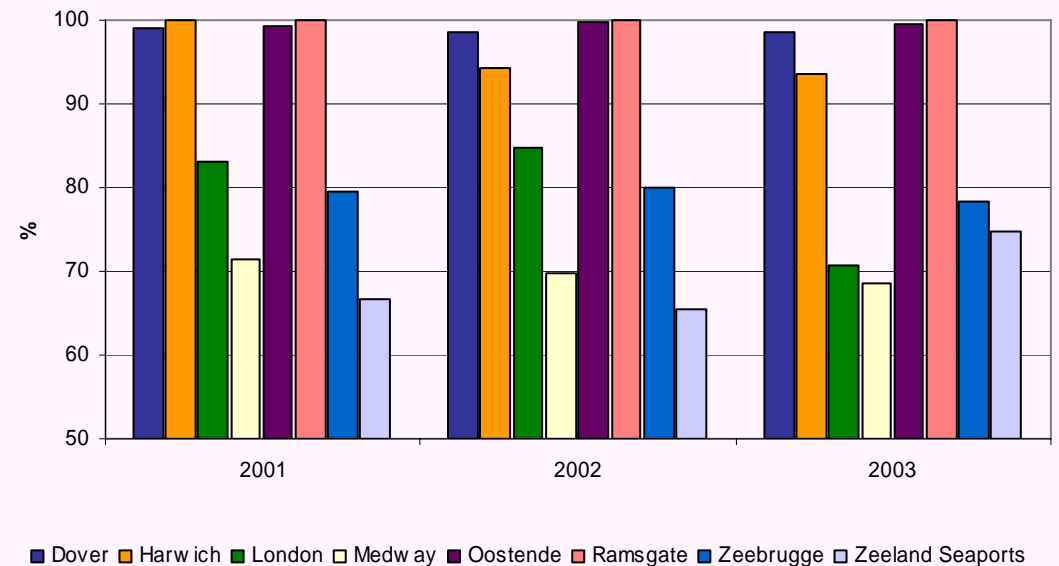
SAIL regions - volume of goods handled



Cross-channel rail and truck



SAIL ports - proportion of short sea shipping per port



The measurements on direct added value of ports and short sea shipping are not available from the EUROSTAT statistics since they do not constitute an obligation for reporting. EUROSTAT compiles returns on short sea shipping from national submissions. For these, and for data about maritime traffic before 2000, a range of transport agencies and national and port authorities in the region were consulted.

What does the indicator show?

Most of the passenger transport in the area of the Southern North Sea takes place between France and the United Kingdom (93%). The ports of Calais and Dover account for the largest share with more than 92% in 2003. In the Zeeland ports, 1997 was a 'peak year' with 7,000 passengers. Zeebrugge and Oostende (Flemish ports) have seen a decline in passenger transport from 5 million passengers in 1980 to less than 825 thousand in 2003. Ramsgate, one of the largest passenger ports in Kent, showed a spectacular decline in the number of passengers from 3.5 million in 1994 to 160 thousand in 1998. This decline was a consequence of the closing of the service to and from Dunkerque, as a result of competition from the Channel Tunnel and the opening of the A16 motorway. Harwich in Essex has remained relatively important with 1 million passengers in 2003. In Nord-Pas de Calais the high number of passengers transported every year is attributed to the port of Calais with as many as 20 million passengers in the year 1997.

Passenger numbers on the Channel link between Calais and Dover notably influence the figures for both the UK and France. Since 1997, passenger numbers on this route have dropped by more than 20%. This is evidently due to the alternative to maritime transport given by the Channel Tunnel. However, both Dover and Calais have been able to stop a further decline as they registered respectively 3.1% and 4.3% more passengers in 2002 than they did in 2001. Although Belgium's passenger transport by sea is much lower in absolute terms, the volumes have obviously also been affected by the alternative of rail transport through the Channel Tunnel, with a fall of more than 40% between 1997 and 2002.

Cross-channel truck freight traffic has increased considerably since 1995 (3.9 million tonnes in 1995 up to 12.8 million in 2003) with a temporary decrease in 1997. Cross-channel rail transport has seen a more modest increase (1.35 million tonnes in 1995-1.74 million tonnes in 2003). However, in spite of the increase in transport by rail in absolute terms, the proportional importance of truck freight keeps growing. The peak in the ratio of cross-channel rail over truck freight transport in 1997 is attributable to a fire, which blocked the tunnel traffic to trucks for over a year.

At the European level, short sea shipping (SSS) is the only mode of transport competing with road transport. In terms of volume it has grown by around a third during 1991-2000 to about 1,270 billion tonne-km, which is comparable with road transport. Insufficient data is available at the port level in order to evaluate the trends of SSS in the SAIL region. For the evaluated SAIL ports, the proportion of short sea shipping has not changed considerably over the last three years.

The total volume of goods handled by Southern North Sea ports has grown by more than 60% over the last twenty years. In 2003, about 250 million tonnes were handled by the SAIL ports. In West-Vaanderen and Zeeland the volume of handled goods has more than doubled since the early eighties. In Kent, Essex and London the trends are less clear while in Nord-Pas de Calais some ports show an increase (Calais, Dunkerque). The volume of goods handled by Boulogne-sur-mer has decreased since 1997.



In Zeeland and West-Vlaanderen, direct added value has increased for most ports, although not spectacularly. The most important ports of those regions in terms of added value are Zeebrugge in West-Vlaanderen and Terneuzen in Zeeland.

What are the implications for planning and managing the coast?

At European level, 3,054 million tonnes of goods were handled in 2002, and 405 million persons are estimated to have passed through EU15 maritime ports in 2002.

Trends in the volume of goods and passengers are generally interpreted for sectoral policy making and analyzed in the cost-benefit studies of port authorities.

The European Commission objectives for achieving sustainable transport are to: (1) bring back the shares of alternative modes (rail, inland waterways, short sea shipping and oil pipelines) to their 1998 levels by 2010 (CTP); (2) generate a shift in transport use from road to rail, and increase water transport (SDS); and (3) reduce the link between economic growth and transport demand (also called ‘decoupling’).

The need for action with respect to modal split was first acknowledged in the EU Transport and Environment (T&E) integration strategy. In its sustainable development strategy (SDS), the EU has set itself the objective to shift freight from road to alternative modes. In the White Paper on the Common Transport Policy (CTP), the Commission proposes 60 or so measures to reach this objective. In the field of shipping for example, documentary procedures for ships that call at EU ports have been simplified. Additionally, the Commission's strategy for promoting short-sea shipping has been prolonged by Council resolution in February 2000.

‘Decoupling’ economic growth and transport demand is considered a key action in order to deal with climate change and alleviate health impacts from transport in urban areas. This objective was first defined in the Transport and Environment (T&E) integration strategy and further mentioned in the sustainable development strategy in relation to the reduction of congestion and other negative side effects of transport.

Nevertheless, ports have to compete with other coastal uses. They might also have negative impacts on tourism, landscapes, habitats and ecosystems. Port infrastructures and activities can have visual and noise impacts on the areas in which they are sited and they may cause various forms of pollution. Therefore planning of port expansion and regulation has to be done considering other coastal functions so as to avoid conflict, preserve tourism, and protect biodiversity and natural values.



How reliable is the indicator?

The data on goods and passengers were cross-checked with local sources of information from port authorities. Data for short sea shipping and oil pipelines are based on estimations and the data is not readily accessible for all SSS ports. Since short sea shipping is of great importance in European freight transport, more accurate statistics are needed for the Southern North Sea region.

For passenger numbers, counts of cruise passengers are only made in ports where they (dis)embark. Hence, for some ports passenger numbers reflect only part of the total movements and give no indication of the importance of cruise tourism to port economics. Data on added value of ports are difficult to compare since they are collected through different methodologies. The data for added value of ports is incomplete and scattered: there is no data for ports in Nord-Pas de Calais, for the UK only data from 2003 is available.

