



ECONOMIC RELATIONS BETWEEN ITALY AND THE MEDITERRANEAN AREA

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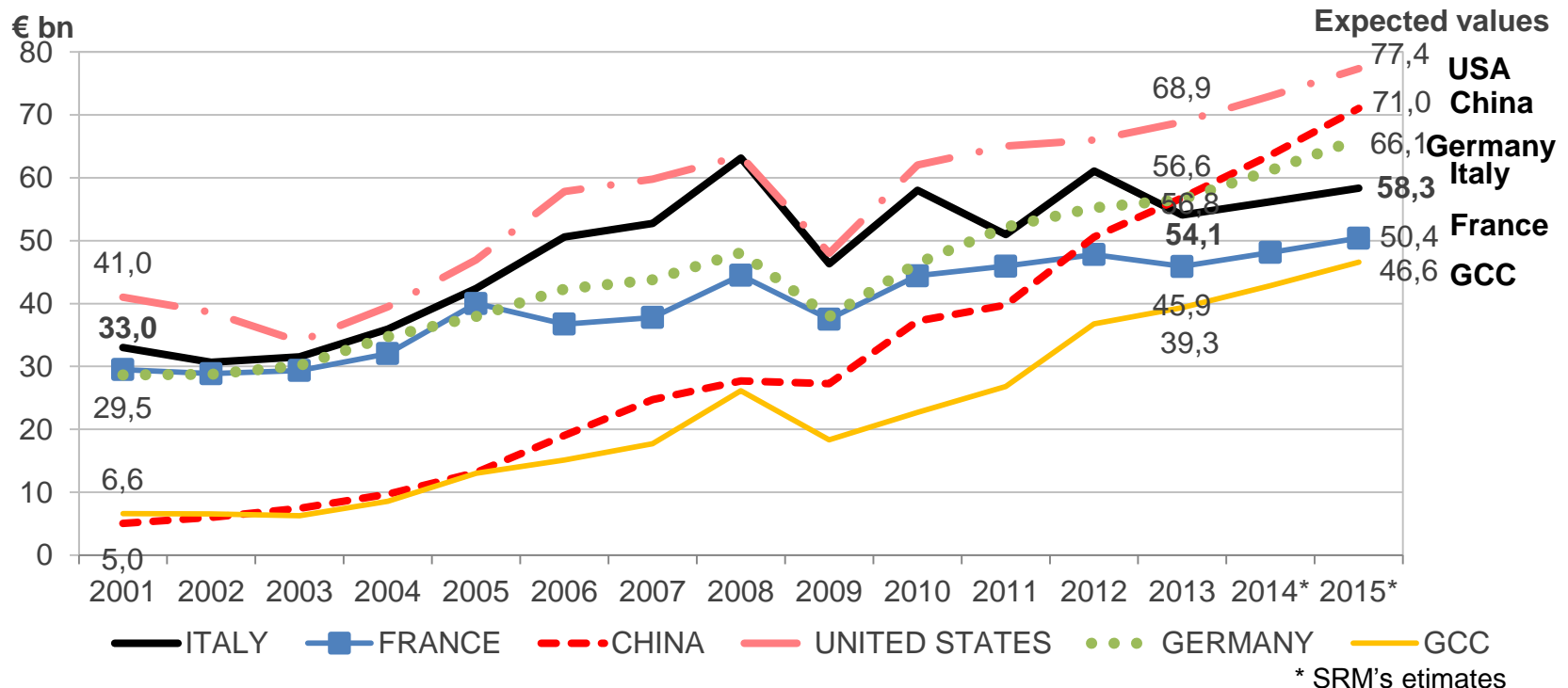


AGENDA

- *Trade relations with the Mediterranean Area*
- *Trade relations between the Mediterranean Area and the Southern Italy*
- *Conclusions*

Trade relations with the Med Area*: Italy is still leader but loses the primacy

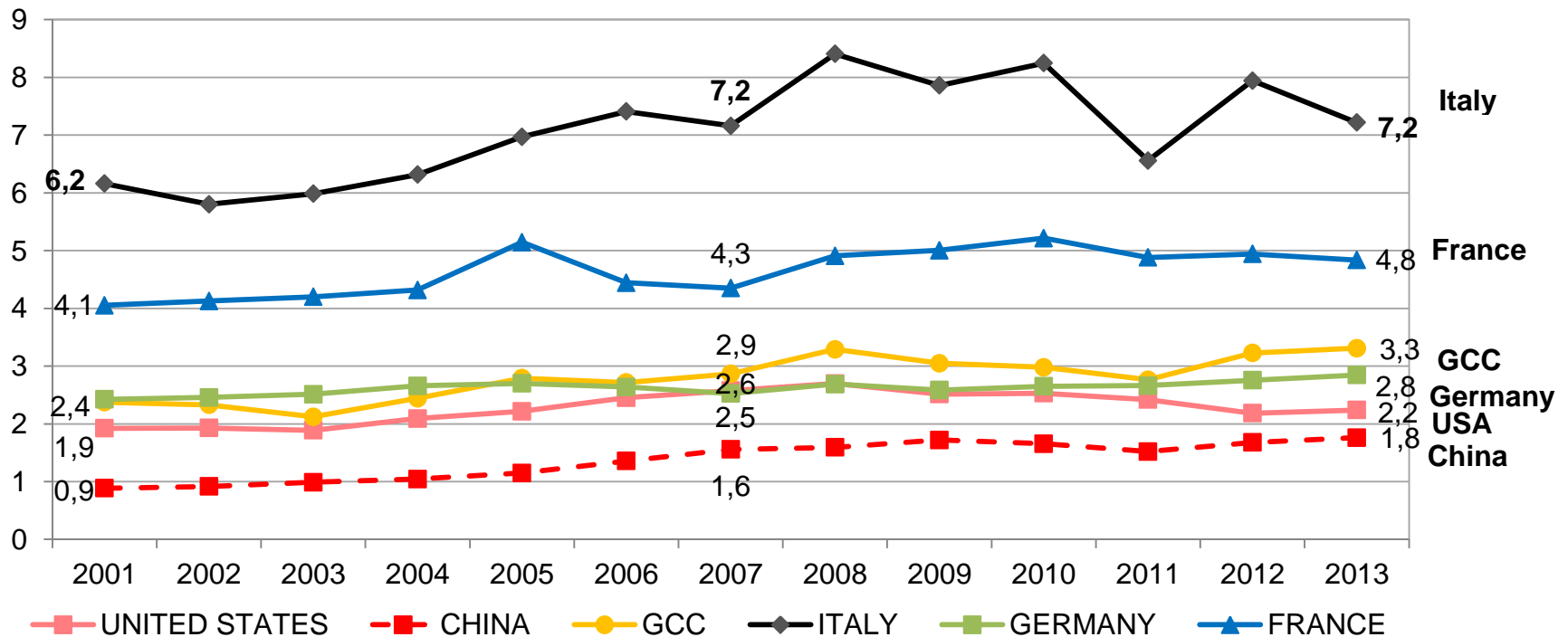
- Trade (imports + exports) between Italy and the Med Area grew by **63.9%** in the **2001-2013 period**; (€54.1 bn in 2013).
- As for 2012, Italy, with **€61.0 bn**, was first among the European countries.
- Italy's 2013 data were severely affected by the fall in trade with **Libya** (about €4 bn less, compared to 2012); mostly «energy products».



Med Area's share (%) on total foreign trade: Italy is largely the first country

- In 2001-2013 Med Area's weight on Italy's foreign trade grew from 6.2% to 7.2%. France is the second with an incidence of the Med Area of 4.8%.

Weight % of trade with the Med Area on total foreign trade
Italy and its main competitors

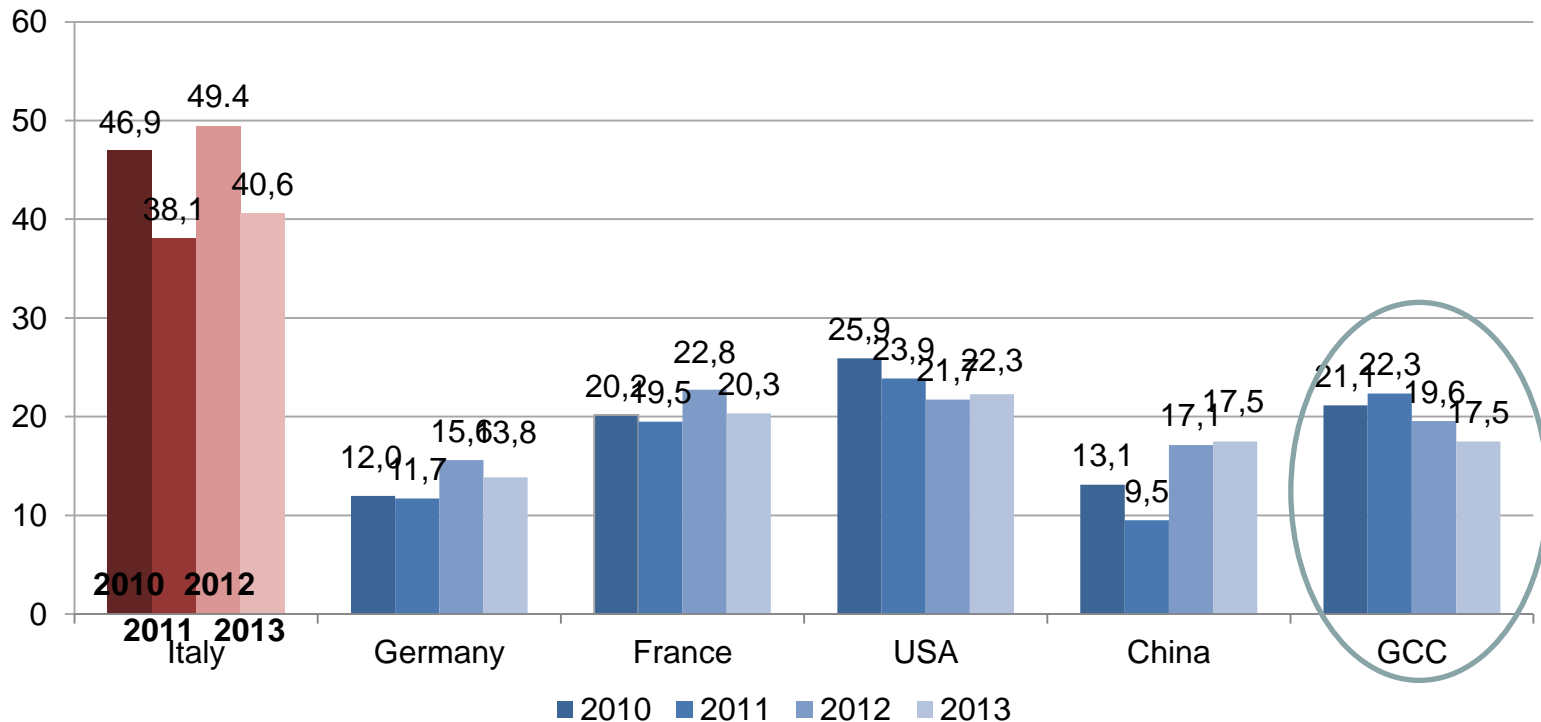


Source: SRM elaboration on Eurostat and Unctad data

Trade between Italy and the Med Area: A remarkable weight for oil and energy products

- Energy products** make up for almost 50% of trade between Italy and the Med Area. In 2013 the weight of energy products on Italy's trade with the Med Area fell to 40.6%. It is still much higher than the one recorded for Italy's competitors.

Weight % of the trade of oil and energy products on total trade with the Med Area

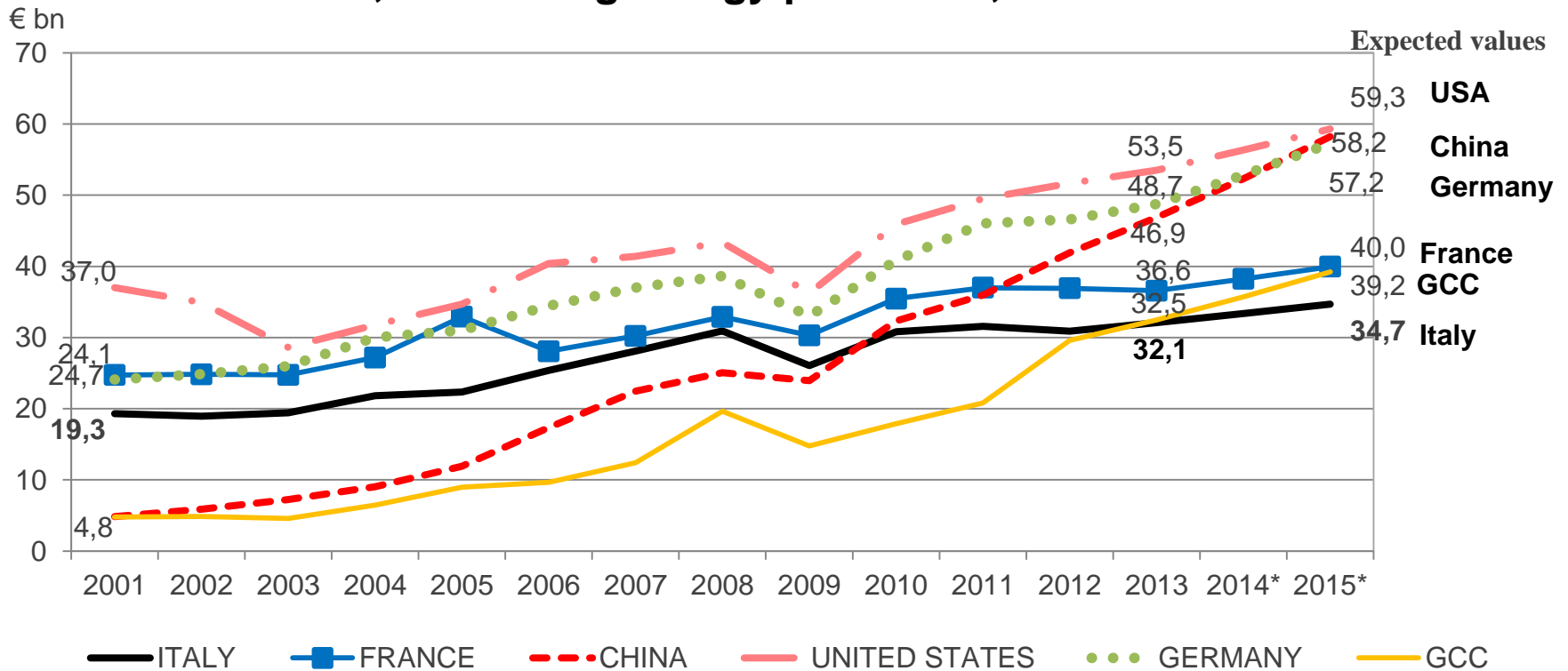


Source: SRM elaboration on Eurostat, Istat and Unctad data

Excluding oil Italy falls at the 6° place in the ranking

- Manufacturing trade between Italy and the Med Area grew by **66.3%** in the 2001-2013 period, reaching **€32.1 bn** in 2013 (+4.0% on 2012): **€20 bn less compared to Germany.**

Total trade, «excluding energy products», with the Med Area



Source: SRM elaboration on Eurostat, Istat and Unctad data

* Stima SRM

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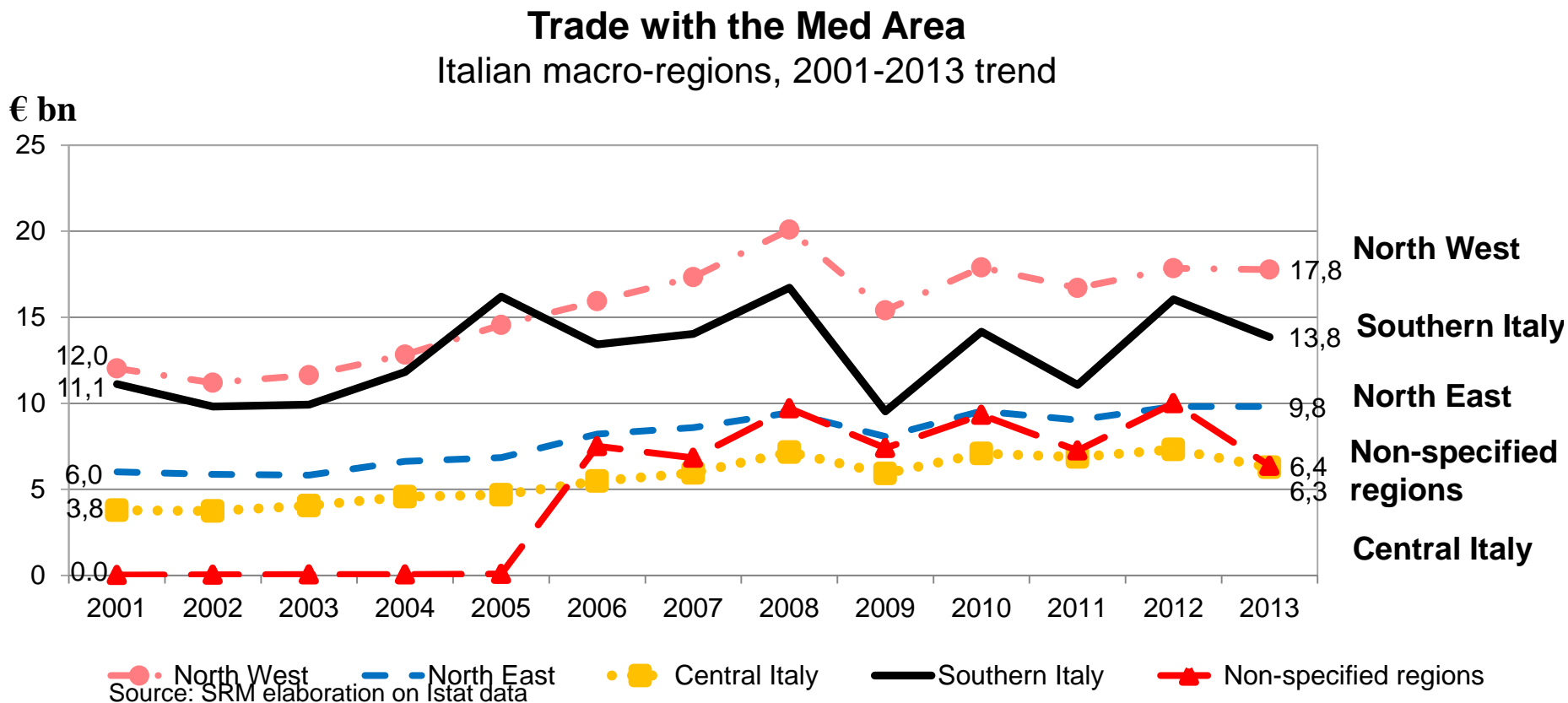
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Southern Italy is the second Italian macro-region in terms of trade with the Med Area

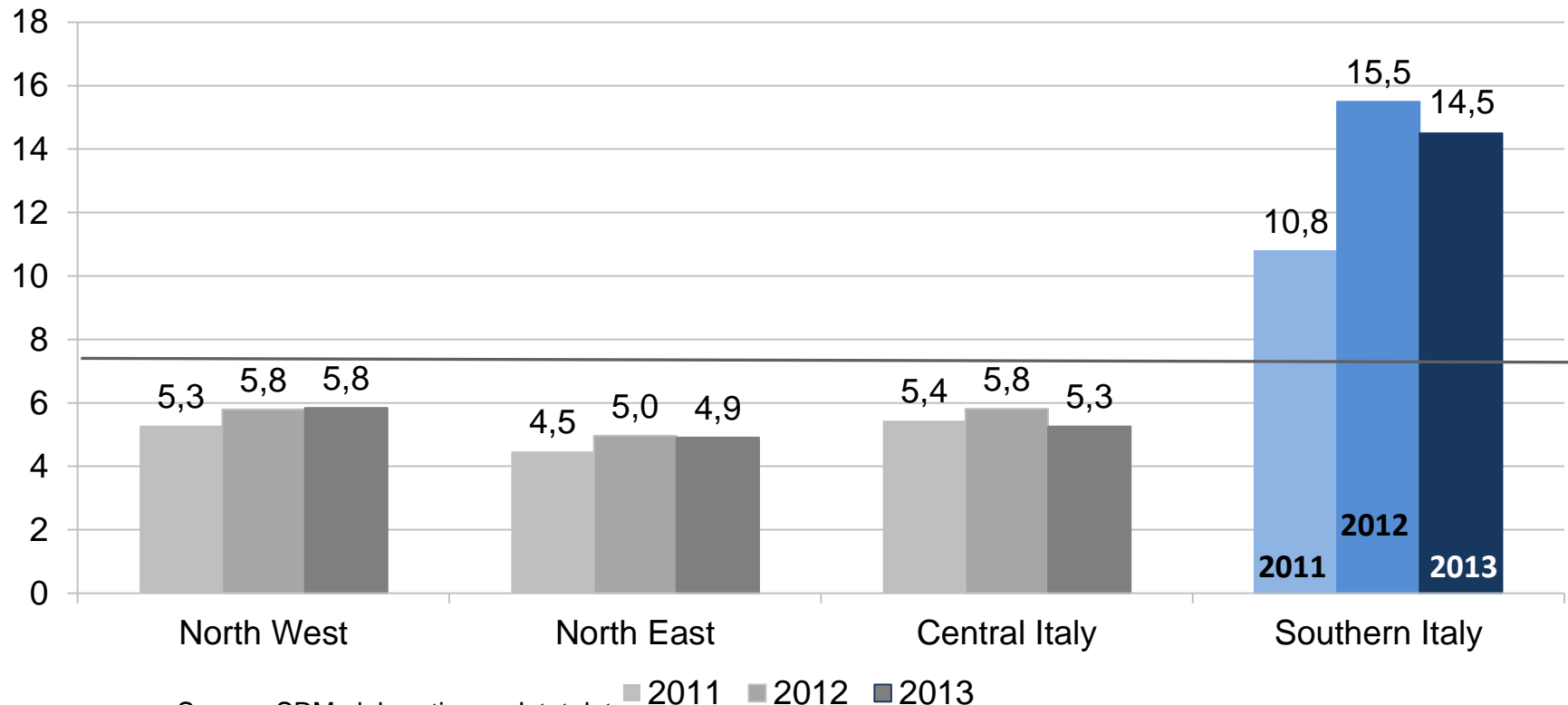
- As for 2013 Southern Italy's trade with the Med Area was **€13.8 bn.** North-Western Italy is first (€17.8 bn).
- Between 2001 and 2013 Southern Italy's trade with the Med Area grew by **24.5%**.



Southern Italy's foreign trade: much more oriented to the Mediterranean

- Med Area's weight on Southern Italy's foreign trade (14.5%) is almost **triple compared to the other Italian macro-regions** (as for North West, Med Area weight on foreign trade is only 5.8%).

Weight % of trade with the Med Area on total foreign trade
Italian macro-region

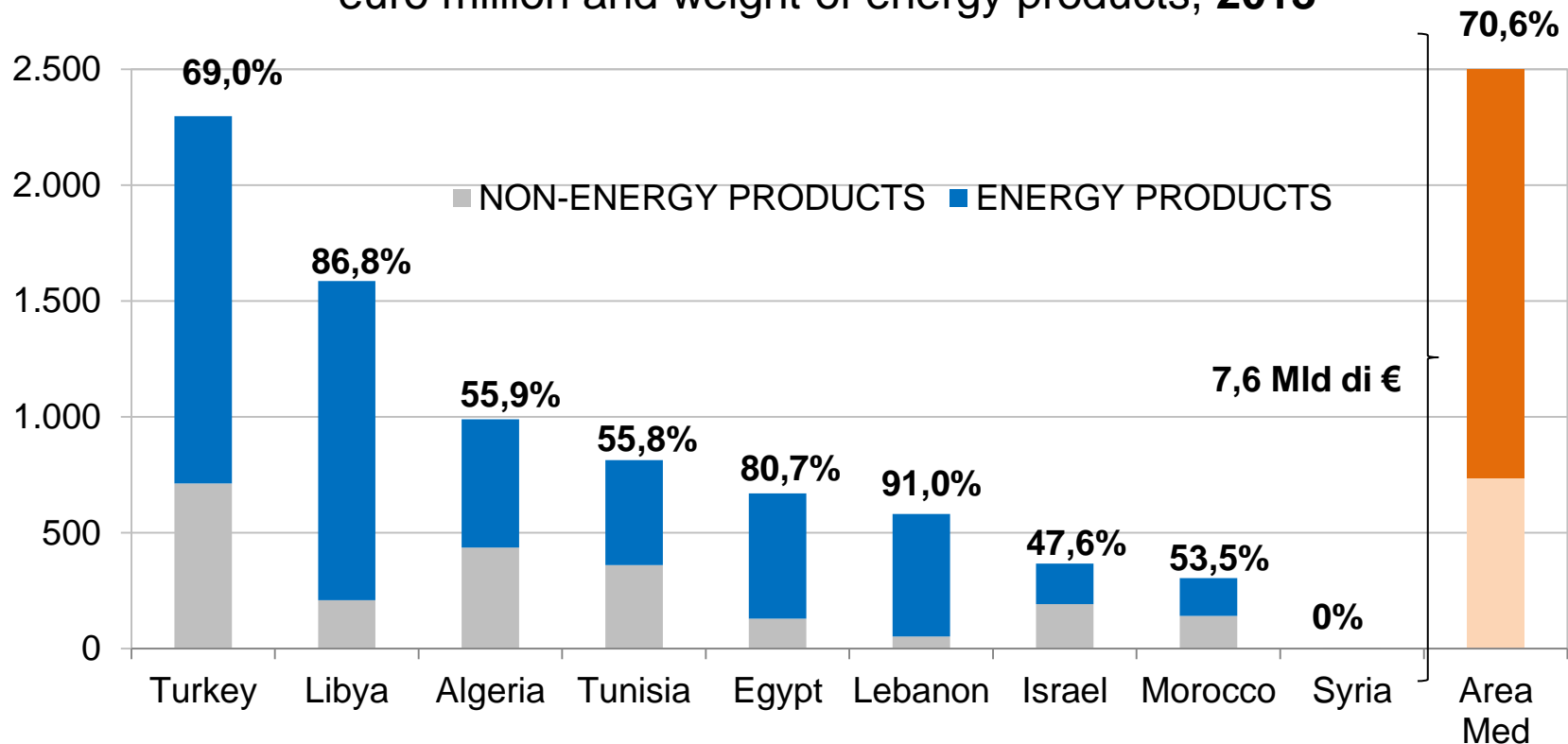


Source: SRM elaboration on Istat data

Southern Italy's exports to Med countries: big prevalence of «energy products»

- Excluding Syria, energy products make up for almost 71% of Southern Italy's exports to Med countries.

Southern Italy's exports to Med countries
euro million and weight of energy products, 2013



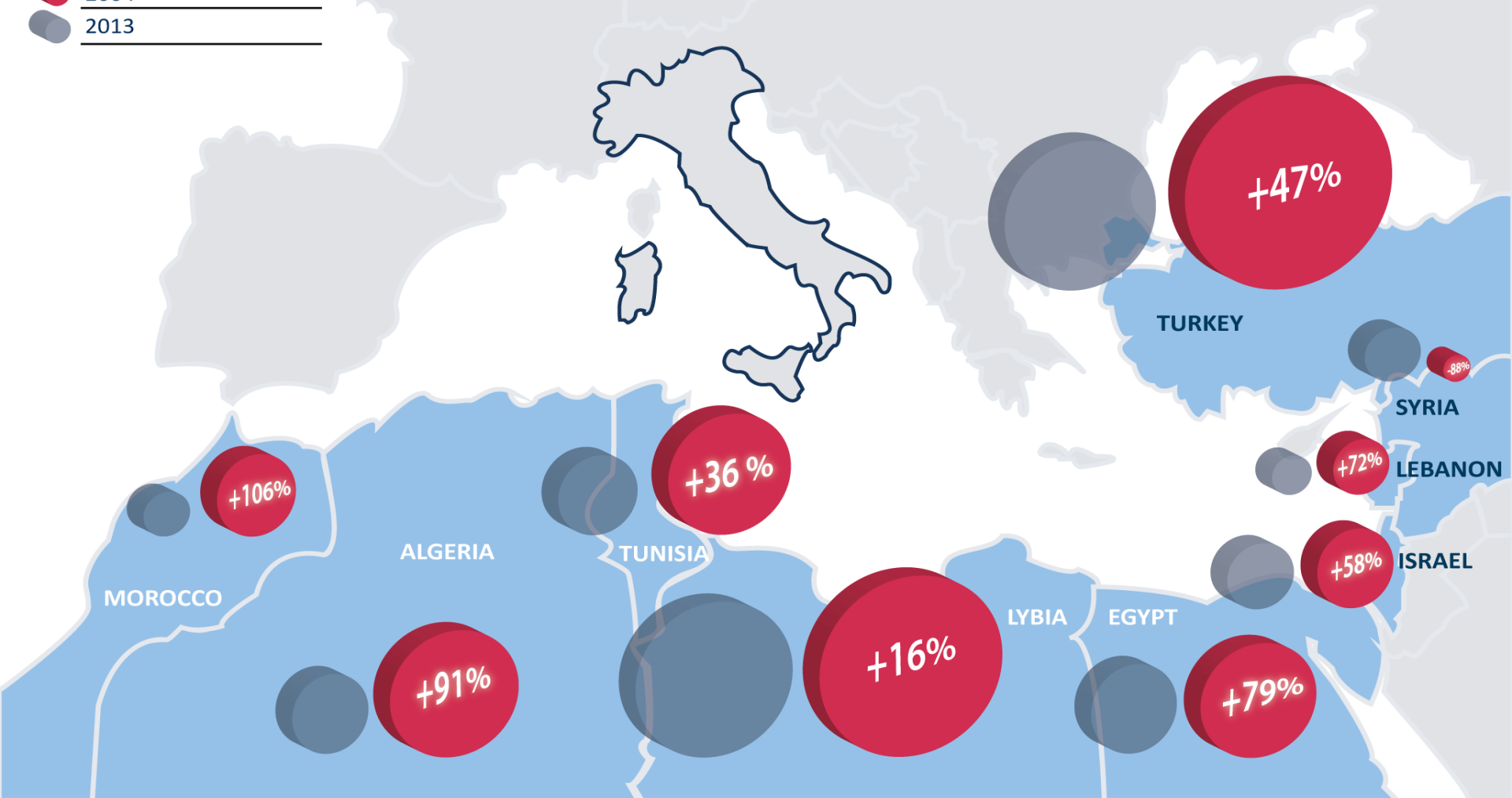
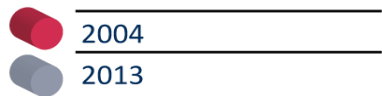
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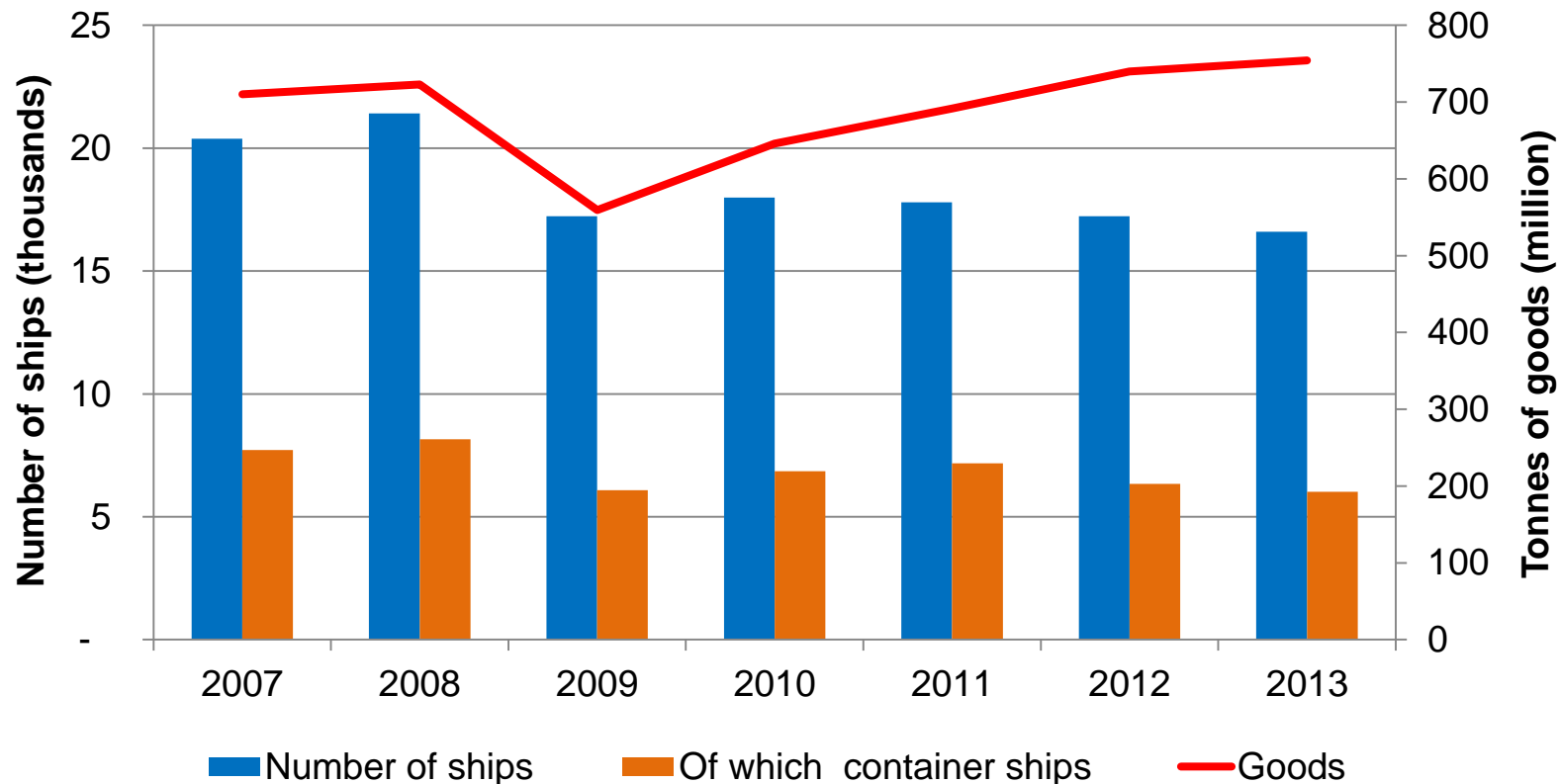
Maritime trade relations between Italy and the Mediterranean area

- more than **75.5%** of trade is by sea. The maritime trade grows by 41.6% from 2004 to 2013



Suez Canal: tonnes of goods and size of vessels on the rise

- In 2013, despite a drop in the number of transiting vessels, the Suez Canal recorded a **2%** increase in goods transported, testifying to the **larger size** of the ships travelling on East-West routes.



Source: SRM elaboration on Suez Canal Authority data, 2014

CONCLUSION

- **Trade relations: Italy is still leader but loses the primacy**
- **A remarkable weight for oil and energy products**
- **Manufacturing trade between Italy and the Med Area grew by 66.3% in the 2001-2013 but excluding oil Italy falls at the 6^o place in the ranking**
- **Southern Italy's is more oriented to the Mediterranean**
- **The ports of the South Shore of the Mediterranean increased their market share between 2005 and 2013 from 18% to 27%;**

Grazie per l'attenzione!!!