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WEST-MOS
Western Europe Sea Transport &
Motorway of the Sea
2005-EU-90609-S-SINCOM



Puerto Bahía de Algeciras

Autoridad Portuaria de la Bahía de Algeciras

D 7.11 – ALGECIRAS PRACTICAL STUDY

MARKET STUDY AND COST BENEFIT ANALYSIS AT MICRO LEVEL

Algeciras - Vigo - Saint Nazaire - Calais



26 / 06 / 2008

Project co-funded by the European Commission within the trans-European networks budget (TEN-T)

 **idom**
Consultoría

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Characteristics of the Port of Algeciras Bay

Evolution of traffic

Suitability of the port facilities and land infrastructure

Potential Traffic flows

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MoS Characteristics

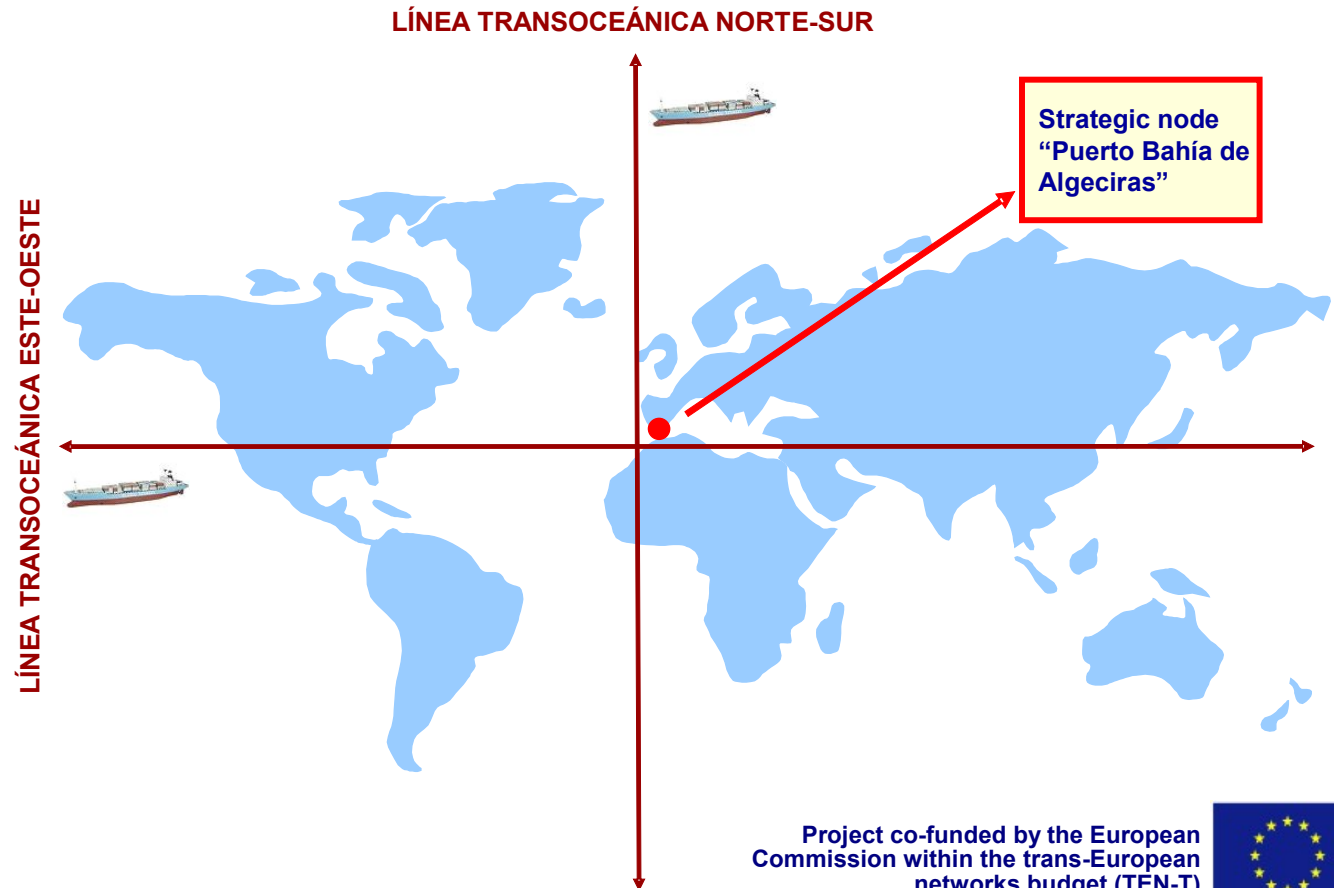
Conclusions



Strategic Node

We enjoy a privileged location at the crossroad of trans-oceanic maritime routes, between the Atlantic and Mediterranean.

- Route East-West
- Route North-South



Strategic node Europe - Africa

The Port of Algeciras Bay channels the majority of road transit between Europe and North Africa. (217.000 trucks crossed in 2007 via Algeciras meaning an annual growth of 8,6% (2001-2007)).



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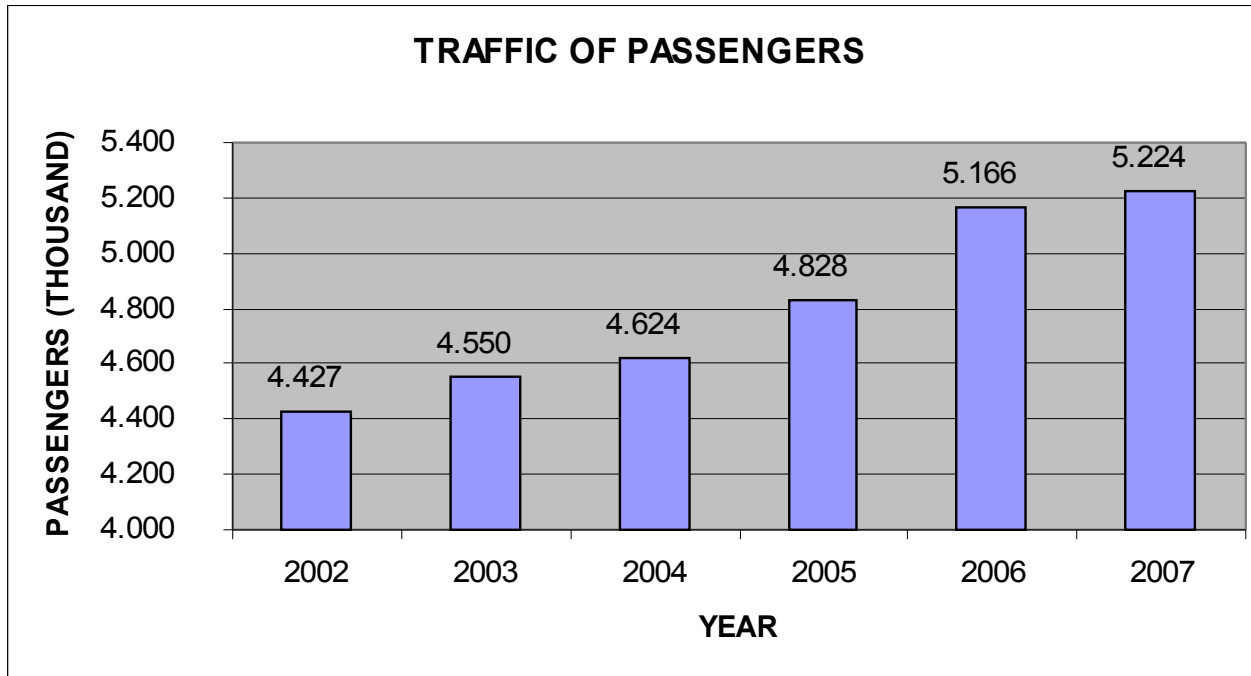
MoS Characteristics

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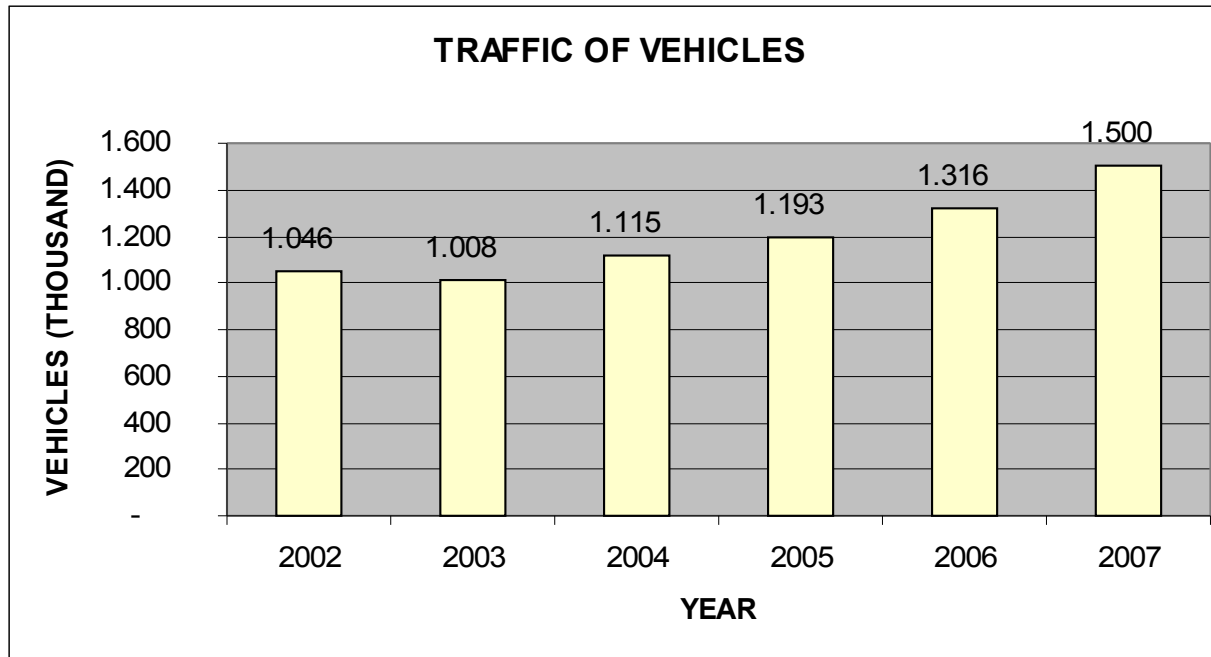
Traffic Evolution

NUMBERS OF PASSENGERS (IN THOUSAND)



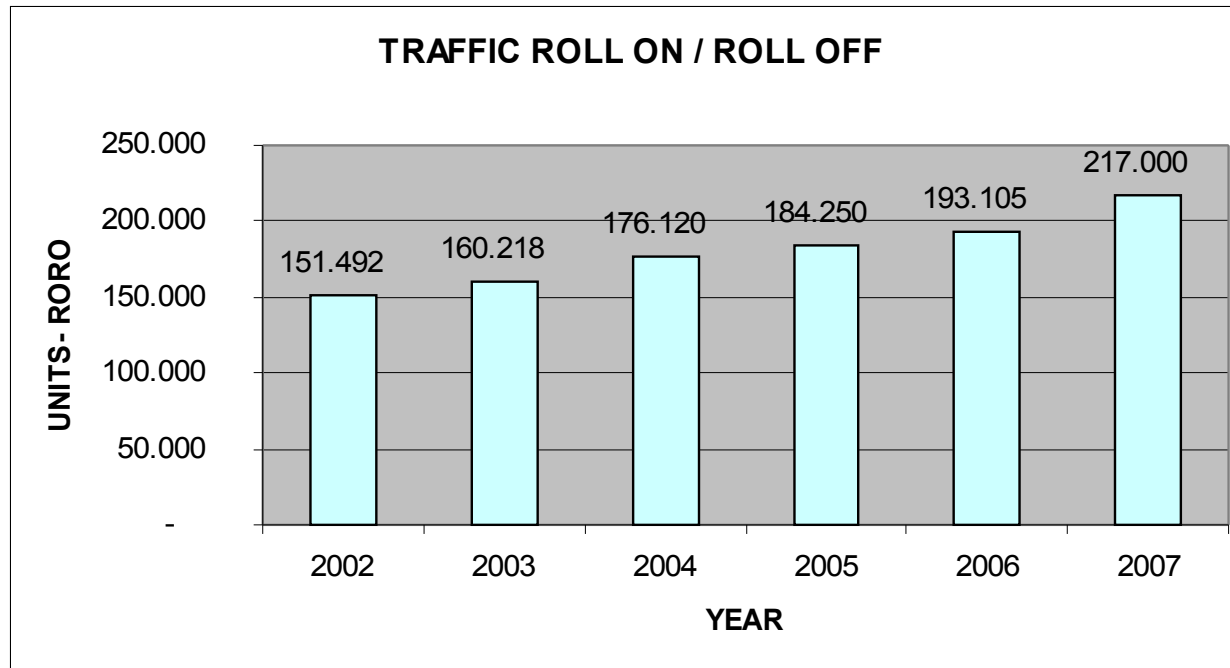
Traffic Evolution

NUMBERS OF VEHICLES (IN THOUSAND)



Traffic Evolution

UNITS OF INTERMODAL ROLL-ON/ ROLL-OFF TRANSPORT



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Facilities and Port Infrastructure





1. ASSISTANT SHIP AREA



2. PIF AREA



4. GALERA PARKING

3. PIF PARKING





5. LOADING/UNLOADING AREA TO/FROM CEUTA



6. LOADING/UNLOADING AREA TO/FROM TANGER



7. ISLA VERDE AREA





8. ISLA VERDE TERMINAL AREA



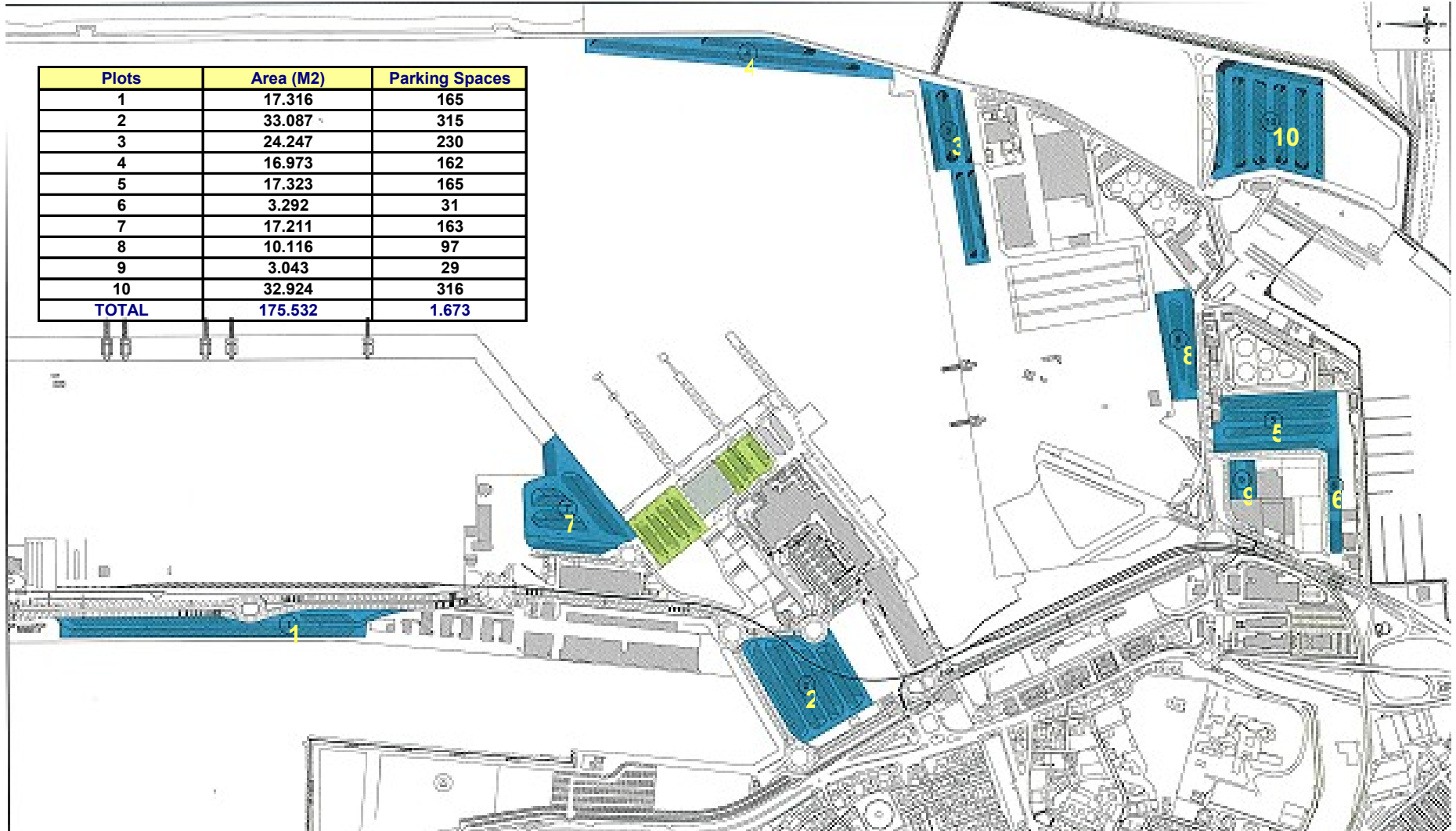
9. ISLA VERDE OUTSIDE AREA



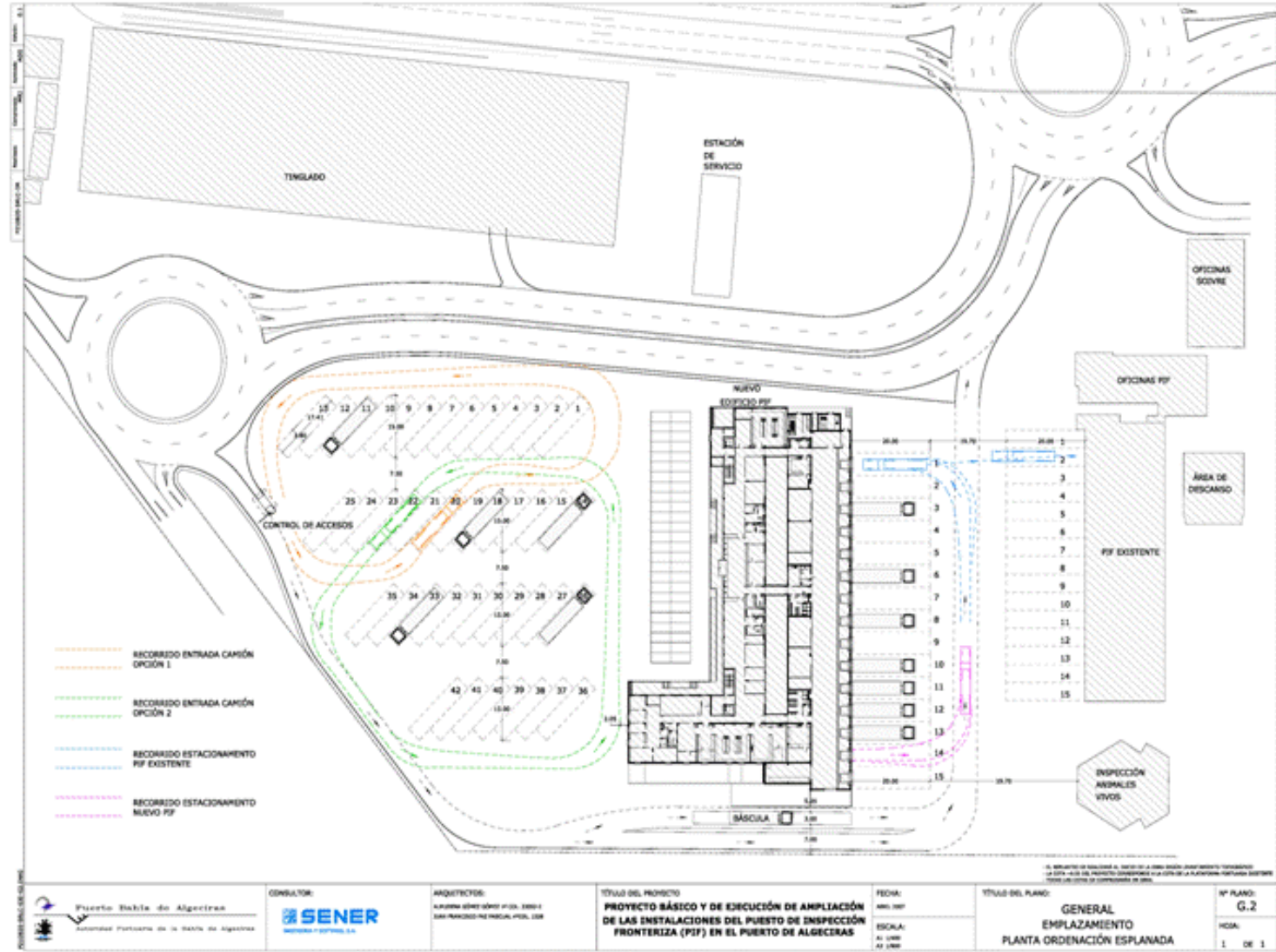
PRINCIPE FELIPE AREA (RO-RO)



Facilities and Port Infrastructure



New "Inspection Point" currently under construction



 Puerto Bahía de Algeciras Autoridad Portuaria de la Bahía de Algeciras	CONSEJORA:  SENER SISTEMAS Y EQUIPOS, S.A.	ARQUITECTOS: ALVARO GÓMEZ GÓMEZ S.P.A. 2002-1 SAN FERNANDO DEL PUEBLO, 100A, 20A	TÍTULO DEL PROYECTO: PROYECTO BÁSICO Y DE EJECUCIÓN DE AMPLIACIÓN DE LAS INSTALACIONES DEL PUESTO DE INSPECCIÓN FRONTERIZO (PIF) EN EL PUERTO DE ALGECIRAS	FECHA: AÑO 2007 ESCALA: AL 1:500 PL 1/001	TÍTULO DEL PLANO: GENERAL EMPLAZAMIENTO PLANTA ORDENACIÓN ESPLANADA	Nº PLANO: G.2 FOLIO: 1 DE 1
	<small>EL SERVIDOR DE PLANIFICACIÓN AL SERVIDOR DE LA COMUNICACIÓN INTERMEDIO (COMUNICACIÓN) LA ESTACIÓN DEL PROYECTO CONSIDERADA LA CITA DE LA AUTORIZACIÓN DEL PUERTO EXISTENTE PARA LAS CITAS DE CONSTRUCCIÓN DE OBRAS.</small>					



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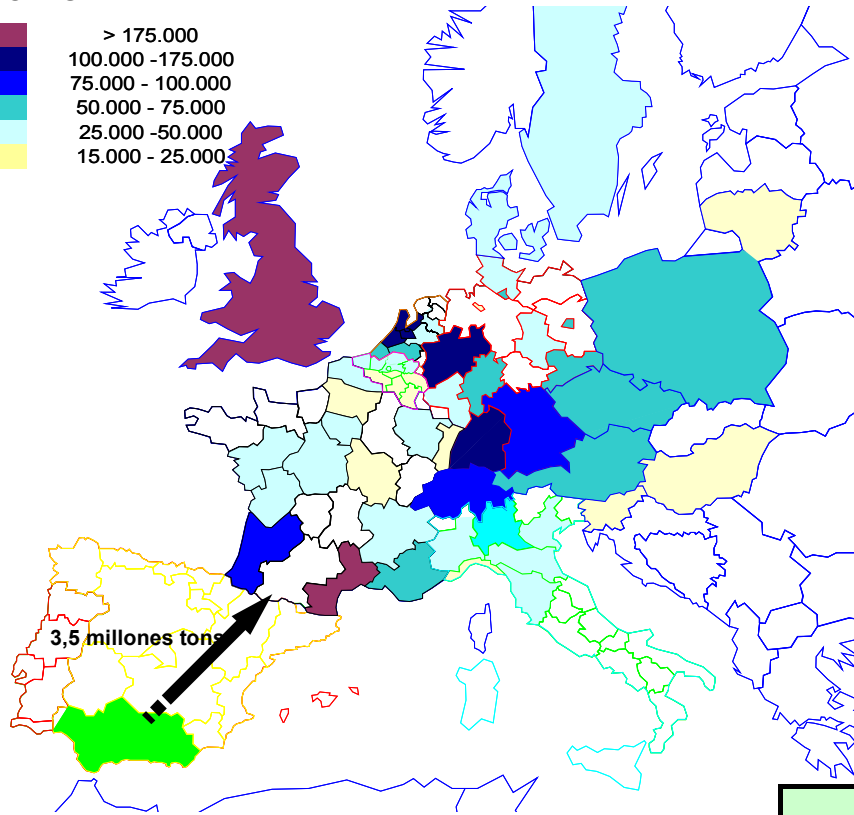
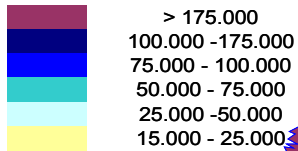


Potential Traffic Flows

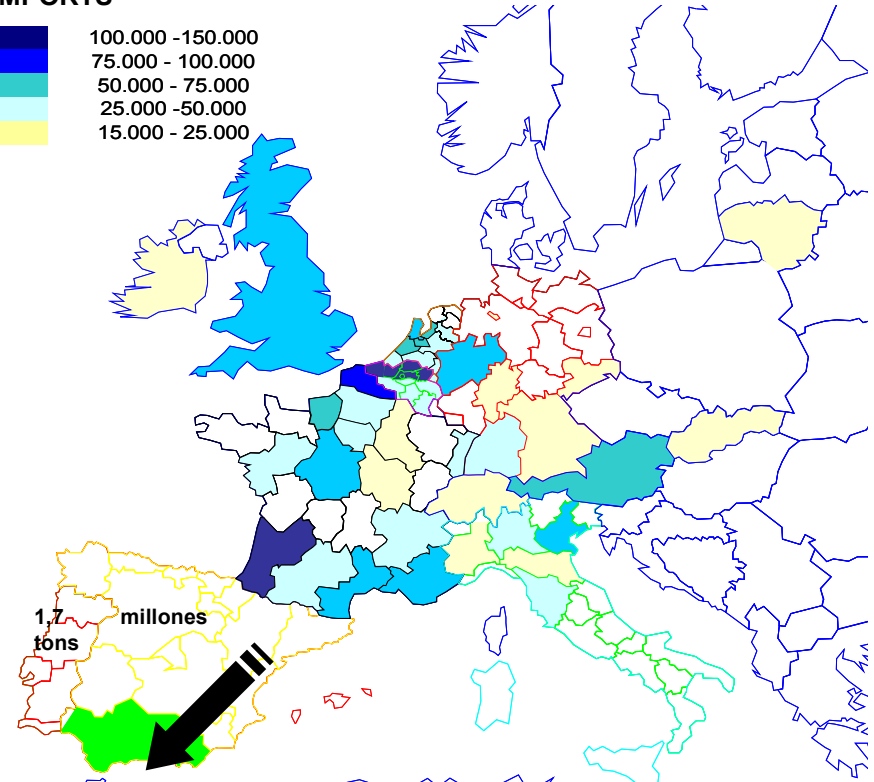
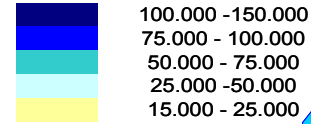
- ✓ **The traffic flows between the Iberian Peninsula and Europe have risen by 36% between 1999 and 2004, meaning 6,34% per annum.**
- ✓ **Further freight transport growth via the Strait of Gibraltar predicted, as a result of the creation of the new free trade zone between the EU and Morocco in 2010.**
- ✓ **Great economic development in Northern Morocco with more free trade logistic, industrial and commercial areas (938 ha, TANGERMED 1 Roro ramp in August 2008 and 8 Roro ramps in 2009) with the intention of strengthen freight to Europe, that will increase significantly the road traffic in the short and mid term towards Europe the majority of it through the Port of Algeciras.**
- ✓ **It is estimated that in 2017 a traffic TIR with Morocco will reach about 650.000 trucks.**

Potential Traffic Flows

EXPORTS



IMPORTS



International traffic by road between Andalusía and Europe

	Exports (Tn)	Imports (Tn)	Total (Tn)
Andalusía-Europe	3.521.029	1.741.600	5.262.629

More than 4.300 trucks/week	More than 2.100 trucks/week	More than 350.000
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Source: Observatorio de los Pirineos 2004

freight flows by road transport between Andalusia and Europe via Irún and La Junquera (in tons)



ALGESIRAS, VIGO, CALAIS & SAINT NAZAIRE HINTERLAND'S



Northbound Traffic

Traffic from Algeciras (incl. Morocco) & Vigo hinterland's to Calais hinterland

Country / Region	Tn	Trucks
Germany (Nord Westphalia)	149.467	10.101
Belgium	158.820	10.618
Denmark	38.480	2.565
Finland	15.565	1.038
France (Nord Pas de Calais, Ile de France y Bassin parisien)	551.704	38.894
Great Britain	483.065	33.850
Ireland	2.865	191
Luxemburg	26.200	1.747
Norway)	7.497	500
Netherlands	415.087	29.796
Sweden	40.936	2.729
Total	1.889.685	132.028

Northbound Traffic

Traffic from Algeciras/Vigo hinterland's to St. Nazaire hinterland

Country / Region	Tn	Tn/truck	Trucks
Andalusia	75.726,97	15	5.048
Galicia	72.784,21	15	4.852
Morocco	17.628,88	15	1.175
Portugal	0,00	15	0
Total	166.140,06		11.076

Southbound Traffic

<i>Traffic from Calais hinterland to Algeciras (incl. Morocco & Canaries Islands) hinterland</i>		
Germany (North Westphalia)	28.737	1.891
France (Nord Pas de Calais, Ile de France y Bassin parisien)	380.672	25.315
Great Britain & Ireland	79.014	7.971
Remaining countries	345.637	22.735
Total	834.059	57.912

<i>Traffic from Calais hinterland to Galicia</i>		
Germany (North Westphalia)	12.149	1.663
France (Nord Pas de Calais, Ile de France y Bassin parisien)	154.912	9.787
Great Britain & Ireland	30.350	2.849
Remaining countries	137.635	8.292
Total	335.046	22.591

<i>Traffic from Calais hinterland to Portugal North Region</i>		
Germany (North Westphalia)	98.704	6.418
France (Nord Pas de Calais, Ile de France y Bassin parisien)	280.079	20.043
Great Britain & Ireland	36.935	2.494
Remaining countries	306.257	23.082
Total	721.975	52.037

Southbound Traffic

Traffic from Calais hinterland to Algeciras (incl. Morocco) & Vigo hinterland's

Country / Region	Tn	Trucks
	Andalusia	745.581
Canaries Islands	1.435	96
Morocco	83.587	7.290
Galicia	334.283	22.540
Portugal	721.975	52.037
Total	1.886.861	132.259

Southbound Traffic

Traffic from St. Nazaire hinterland to Algeciras/Vigo hinterland's

Country / Region	Tn	Tn/truck	Trucks
Andalusia	35.572,08	15	2.371
Galicia	49.165,03	15	3.278
Morocco	16.506,42	15	1.100
Total	101.243,53		6.750

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Financial Analysis

The table below shows a significant savings in terms of costs that the replacement will cause from the terrestrial transport to the maritime transport on the freight chains, with its origin in Andalusia toward other European destination.

Cost comparison SSS vs. Carretera (€)									
Origin \ Destination	Colonia	Bruselas	Copenhage	Helsinki	Paris	London	Dublin	Oslo	Amsterdam
Almería	-302,05	-414,34	-374,93	-321,17	-128,77	-692,39	-692,39	-325,56	-828,22
Algeciras; Cádiz	-702,02	-725,41	-764,62	-710,87	-439,84	-1.003,46	-1.003,46	-715,16	-988,54
Córdoba	-344,06	-367,55	-406,67	-353,01	-81,98	-645,60	-645,60	-357,30	-760,73
Granada	-417,08	-440,57	-479,69	-425,93	-155,00	-718,62	-718,62	-430,32	-784,25
Huelva	-502,65	-526,14	-565,26	-511,50	-240,47	-804,19	-804,19	-515,89	-883,33
Jaén	-270,33	-293,82	-332,94	-279,18	-8,15	-571,87	-571,87	-283,57	-701,41
Málaga	-579,22	-602,71	-641,83	-588,07	-317,14	-880,76	-880,76	-592,46	-890,14
Sevilla	-507,66	-531,15	-647,06	-516,60	-245,57	-809,19	-809,19	-520,90	-892,83
Canarias	-894,54	-918,03	-957,14	-903,39	-632,45	-1.196,07	-1.196,07	-907,78	-1.020,51
Marruecos	-894,54	-918,03	-957,14	-903,39	-632,45	-1.196,07	-1.196,07	-907,78	-1.020,51

* Los número negativos significan el ahorro de costes del SSS frente a la carretera

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MoS Characteristics

Vessel

- Cargo > 100 trucks.
- Dangerous goods: Yes.
- Controlled Temperature : Yes.
- Maximum Vessel Speed 22 knots.

Opportunity CON-RO vessels.(Container-Ro-Ro)

MoS Characteristics

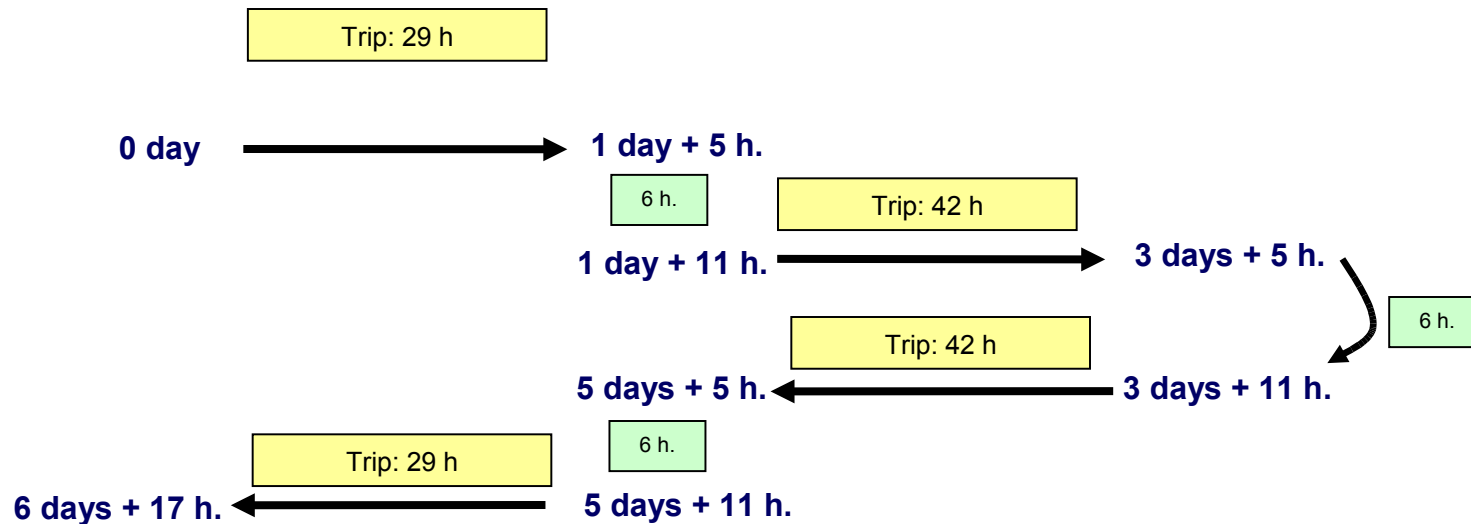
Leg : Algeciras - Vigo – Calais

Distance Algeciras-Vigo: 521 miles¹
 Distance Vigo-Calais: 750 miles
 Average Speed : 18 knots

ALGECIRAS

VIGO

CALAIS



¹ Source: www.distances.com



MoS Characteristics

Leg: Algeiras -Vigo-Calais

Scenario 1: Service once a week Time Table



¹ Source: www.distances.com



MoS Characteristics

Leg : Algeciras - Vigo – Calais

Scenario 2: Others weekly services Time Table



¹ Source: www.distances.com



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Conclusions

- **Algeciras complies with the tender requirements of WEST- MOS projects, in terms of infrastructure available and in terms of traffic required.**
- **Our geographical location is one of the hottest spots in terms of trucks traffic between Africa and Europe.**
- **Further freight transport growth via the Strait of Gibraltar predicted, as a result of the creation of the new free trade zone between the EU and Morocco in 2010.**
- **A saving for trucks companies of up to 25%. Example: Route Algeciras – Calais – Paris.**



Ministero delle Infrastrutture e dei Trasporti

Project co-financed by the European Union from the trans-European transport networks budget (TEN-T)



Proyecto cofinanciado por la Unión Europea con cargo al presupuesto de las redes transeuropeas (RTE-T)

Projet cofinancé par l'Union européenne sur le budget des Réseaux Transeuropéens (RTE-T)

Progetto cofinanziato dall'Unione europea con i fondi del bilancio destinato alle reti transeuropee (RTE-T)

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