

# **The Italian Maritime Cluster**

*October 2018*

## Federazione del Mare

established in 1994

### 17 member associations

Aidim (**maritime law**)

Aimm (**shipping academy**)

Ania (**insurance**)

Ancip (**port operation**)

Assonave (**shipbuilding**)

Assoporti (**port administration**)

Assorimorchiatori (**towage**)

Confitarma (**shipping**)

Collegio Capitani (**maritime staff**)

Cetena (**naval research**)

Federagenti (**ship agency**)

Fedepiloti (**port pilotage**)

Federpesca (**fishing**)

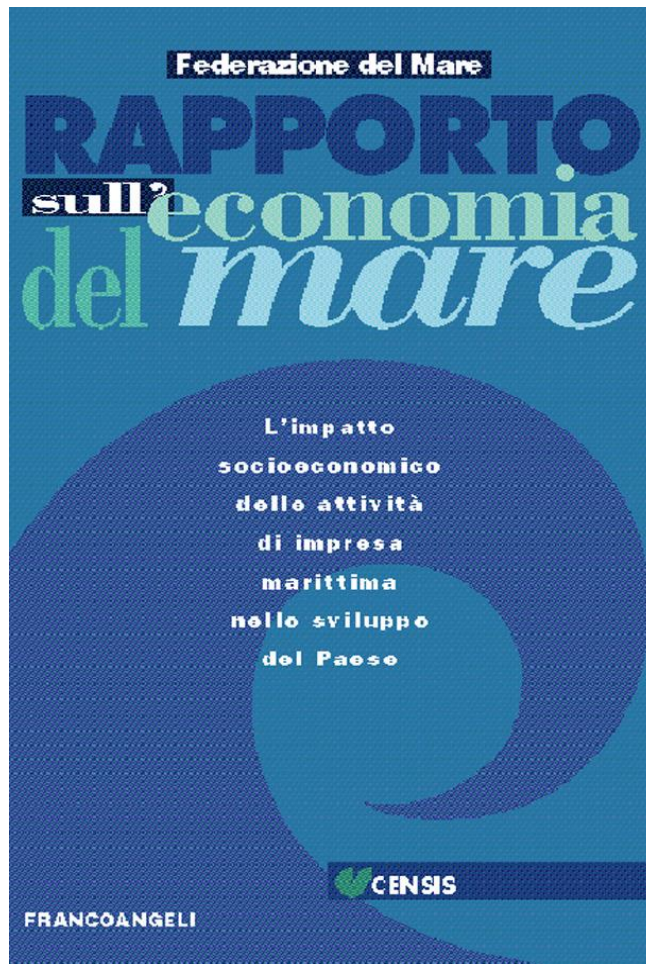
Fedespedi (**intern'l freight**)

Inail (**welfare**)

Rina(**certification**)

Ucina (**yachting**)

*strong links with*  
**maritime Institutions**



1996



2015

## The Italian Maritime Cluster

<u>1995/96</u>	<u>2015/16</u>	<u>Change</u>
<b>Production</b> (Value, Euro) <b>21 billion</b>	<b>Production</b> (Value, Euro) <b>33 billion</b>	<b>+ 57 %</b>
<b>Employment</b> (direct) <b>122,000</b>	<b>Employment</b> (direct) <b>170,000</b>	<b>+ 39 %</b>
(indirect) <b>186,000</b>	(indirect) <b>300,000</b>	<b>+ 61%</b>

## The Italian Maritime Cluster

**33 billion Euro (2% of the GDP)**

- “ **Shipping** : 11.8 billion (*Production Value, PV*)
- “ **Port Logistics and Services**: 5.4 billion
- “ **Shipbuilding and related manufacturing**: 5.1 billion
- “ **Yachting**: 2.8 billion (*PV, 4.5 billion GDP with downstream*)
- “ **Nautical and cruise tourism**: 2 billion
- “ **Fishery**: 1.9 billion (*PV, 4.8 billion GDP with downstream*)
- “ **Institutional** activities: 4.5 billion (Navy, Coast Guard, Port Authorities, etc.)

## The Italian Maritime Cluster

- “ **470,000 employees (300,000 upstream)**
- “ **Production value per employee: 186,000 Euro**  
(shipping 339,000; shipbuilding 280,000;  
yachting 202,000; port activities 197,000)
- “ **Added value per employee: 68,300 Euro**

## The Italian Maritime Cluster

### Europe leader:

- “ First place as cruise embarkation and landing country (6.2 million pax; 4,600 landings)
- “ First country for many years in goods import-export by sea, in 2017 third (215 million tons)

### World leader:

- “ 1<sup>st</sup> Ro-Ro fleet (260 ships, 5.2 million GT)
- “ 4<sup>th</sup> G20 countries fleet (16.5 million GT)
- “ Cruise shipbuilding (Fincantieri)
- “ Motor-yachts building (Azimut-Benetti)

## The Italian Maritime Cluster

### Maritime Intensity Regional Ranking in Italy (All Regions, first six places)

- 1<sup>st</sup>. **Liguria**: first in **port activity** and **yachting**  
second in **shipping** and **shipbuilding**
  - 2<sup>nd</sup>. **Campania**: first in **shipping**
  - 3<sup>rd</sup>. **Friuli – Venezia Giulia**: first in **shipbuilding**
  - 4<sup>th</sup>. **Veneto**: second in **port activity** and **fishing**
  - 5<sup>th</sup>. **Sicilia**: first in **fishing**
  - 6<sup>th</sup>. **Toscana**: second in **yachting**
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