

**MARITIME PASSENGER FLOWS
BETWEEN THE TWO SHORES
OF THE GTMO 5+5 COUNTRIES**

2010

CETMO

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1. INTRODUCTION

This report analyses the main characteristics of the North-South flow of passengers by maritime transport between the two shores of the GTMO 5+5 in 2010. The North Shore comprises the countries of Spain, France, Italy, Malta and Portugal; the South Shore covers the countries of Algeria, Libya, Morocco, Mauritania and Tunisia. This analysis thus excludes flows within the countries mentioned. However, it should be noted that, although the ports of Ceuta and Melilla belong to Spain, they have been considered ports on the South Shore and therefore include domestic flows with other Spanish ports.

The body of the report first describes these flows from a general perspective, looking at overall flows, trends and the flows between the countries. Secondly, it describes the most important ports on the South Shore in terms of flows with the countries of the North Shore. The same description follows for ports on the North Shore and their flows with the countries of the South. Lastly, we present a more detailed analysis of the most important passenger routes between the two shores.

The data presented here are from the CETMO-FLUX 2010 passenger data. This database mainly includes statistics from Eurostat, which offers passenger flows from European ports to other countries around the world. For this reason, other sources based on statistics provided by the ports or national port authorities have been used to obtain data for the ports on the South Shore, as well as data for the different passenger routes. These data exclude cruise passengers.

The use of several sources has made it necessary to analyze their consistency. The results show, in general, a high level of coincidence with variations that range between 0% and 8%, except for the specific case described below:

- For the port of La Goulette, the differences are found in the flows with Genoa, Palermo and Trapani, with the port data being 30%-150% higher than Eurostat data. In order to standardize the source of the data presented as much as possible, the values shown for the port of La Goulette come from Eurostat.

2. MARITIME PASSENGER FLOWS BETWEEN THE TWO SHORES OF THE GTMO 5+5

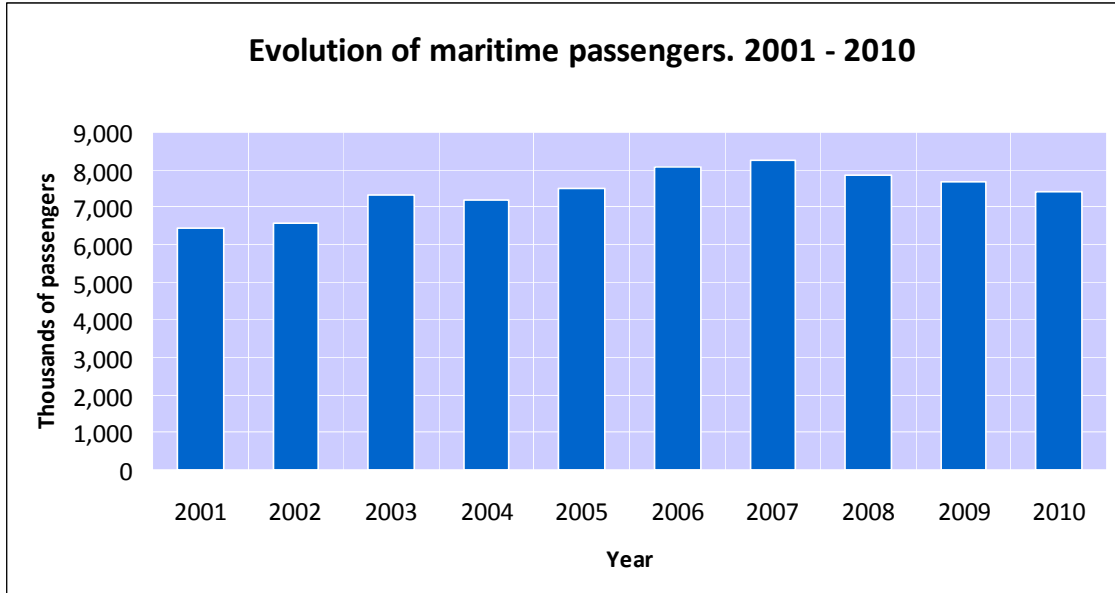
In 2010, the volume of passengers via maritime transport between the North and South Shores of the GTMO 5+5 is **7.4 million** passengers, which represents 31% of the total number of passengers travelling by sea and air between the North and South countries of the GTMO 5+5. Table I provides details on these flows, showing the flows (in thousands of passengers) between the different countries on the two shores.

Thousands of passengers in both directions		SOUTH SHORE						TOTAL
		ALGERIA	LIBYA	MOROCCO	MAURITANIA	TUNISIA	SPAIN (CEUTA AND MELILLA)	
NORTH SHORE	SPAIN	280	0	3,477	0	0	2,521	6,278
	FRANCE	346	0	201	0	242	0	789
	ITALY	0	0	55	0	303	0	358
	MALTA	0	0	0	0	0	0	0
	PORTUGAL	0	0	0	0	0	0	0
	TOTAL	626	0	3,733	0	545	2,521	7,425

Table I. Passenger flows between countries of the two shores of the GTMO 5+5 (thousands of passengers).
Source: CETMO-FLUX 2010 passenger data

A high level of flow concentration is observed, with two flows accounting for 80% of all passengers: Spain-Morocco (3,477,000 passengers) and Spain-Ceuta and Melilla (2,521,000). This gives an initial idea of the importance of the Strait of Gibraltar for passenger flows between the North and South shores of the GTMO 5+5, as the following sections also demonstrate.

The flows between France-Algeria (346,000 passengers) and Italy-Tunisia (303,000), are also remarkable, but with significantly lower volumes than the lines cited above.

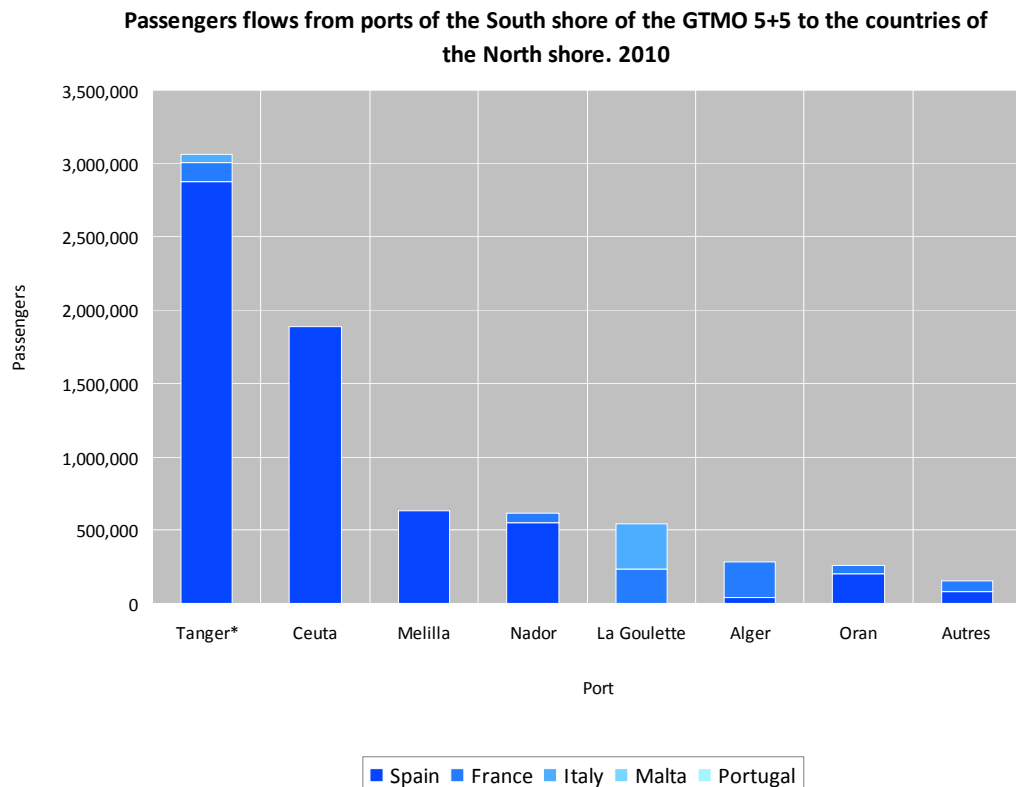


Graphic I. Evolution of maritime passenger flows between the two shores of the GTMO 5+5
Source: Eurostat.

The evolution of passenger flows in recent years has shown two clear trends, with a turning point in 2007. During the first 7 years (2001-2007), the growth in number of passengers was considerable, with an average annual increase of about 260,000 passengers. Since 2007, this trend has reversed, with a mean annual loss of about 210,000 passengers, thereby making the 2010 volume similar to that in 2005.

2.1. The most important passenger ports on the South Shore of the GTMO 5+5 in flows with the North Shore

Graphic II shows the volume of passengers transported by the most important ports on the South Shore of the GTMO 5+5 in flows with the countries of the North. Its analysis reveals the following main features:



* Due to lack of more detailed information in Eurostat, no distinction is made between the ports of Tangier and Tangier Med. According to the statistics of these two ports, the total volume is 2 million passengers at Tangier and 1.2 million at Tangier Med.

Graphic II. Total volume of passengers from ports on the South Shore of the GTMO 5+5 in flows with the countries of the North. Source: CETMO-FLUX 2010 passenger data.

The passenger flow is mainly concentrated at 7 ports: Tangier, Ceuta, Melilla, Nador, La Goulette, Algiers and Oran. The sum of their volumes represents 98% of all maritime passengers between the two shores of the GTMO 5+5

It can be observed that the ports located on the Strait of Gibraltar are the most noteworthy, and the only ones that surpass one million passengers; together, the two account for 66% of passengers moving between the two shores. If we add the flows from the ports of Melilla and Nador, this percentage rises to 83%, thereby demonstrating the great importance of the ports in the area of the Strait to the flows analysed here. Among the GTMO 5+5 North countries, Spain receives practically all (96%) of the passengers from these four ports (Tangier, Ceuta, Melilla and Nador).

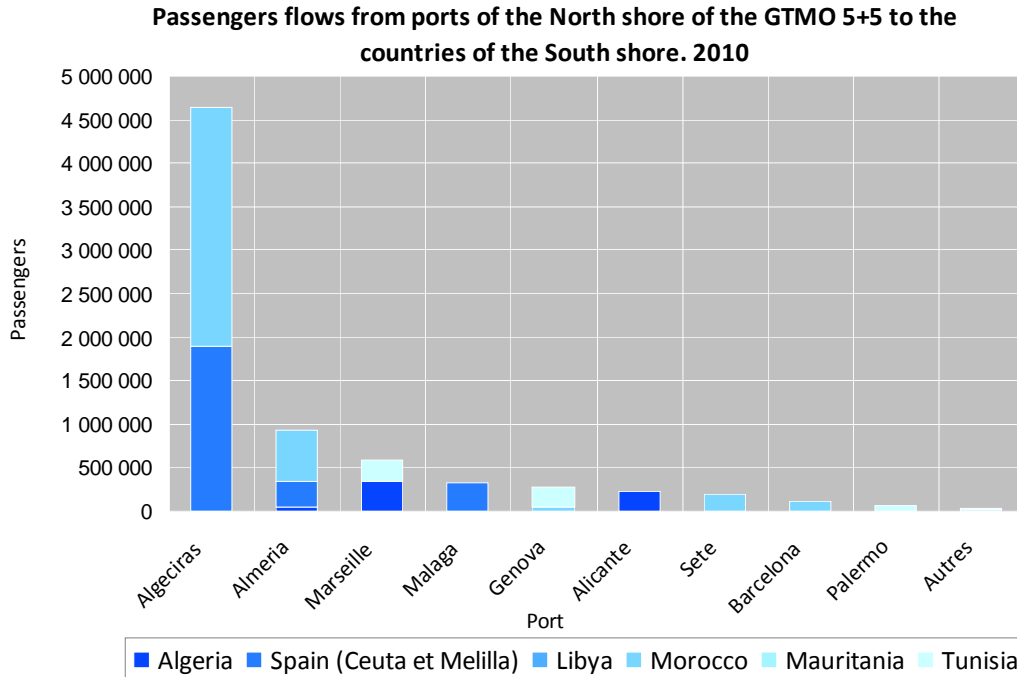
As for the remaining ports, La Goulette stands out with 0.5 million passengers, thus making it the main port of entry to Tunisia. Italy (56% of passengers) and France (44%) are the GTMO 5+5 North countries associated with this port. Figure I also clearly shows that La Goulette is the South Shore port that receives most of the flow from Italy.

Of lesser importance are the ports of Algiers and Oran, which more or less equally split the passenger flow from Algeria (0.3 million each), with their destinations being Spain and France.

It has to be remarked that due to lack of more detailed information in Eurostat, no distinction is made between the ports of Tangier and Tangier Med. According to the statistics of these two ports, the total volume is 2 million passengers at Tangier and 1.2 million at Tangier Med.

2.2. The most important passenger ports on the North Shore of the GTMO 5+5 in flows with the South Shore

The analysis of graphic III reveals the next most important features:



Graphic III. Total volume of passengers from ports on the North Shore of the GTMO 5+5 in flows to the countries of the South. Source: CETMO-FLUX 2010 passenger data.

A high concentration of passengers can be observed at the port of Algeciras, which, with 4.6 million passengers, accounts for 63% of all passenger movements between the North and South shores of the GTMO 5+5. Together with the volumes from Almeria (0.9 million), the second most important port, and Malaga (0.3 million), this percentage rises to 80%, giving considerable weight to the ports in this area of the Strait. The flows of these ports are almost exclusively with Morocco and the ports of Ceuta and Melilla. The port of Alicante, for its part, is the main Spanish port associated with Algeria; all of its passengers (232,000) travel to that country.

The port of Marseille moves the third highest number of passengers (600,000) to the southern ports of the GTMO 5+5, with their destinations being Algeria and Tunisia. The port of Sete, with a significantly lower volume (201,000 passengers), is the next most important French port and is linked exclusively with Morocco.

Genoa, with 277,000 passengers, and Palermo, with a significantly lower volume (67,000 passengers), are the most important Italian ports. Tunisia is the country that receives practically all of their passenger flows.

2.3. The most important passenger routes between North and South

This section describes the most important passenger routes between the North and South Shores of the GTMO 5+5. This information is shown in Table II, which lists the total volume of

passengers on each of these routes, and also in map form. An analysis reveals the following main features:

PORT	SOUTHERN SPAIN		MOROCCO				ALGERIA						TUNISIA		TOTAL
	Ceuta	Melilla	Tangier*	Al Hoceima	Nador	Laayoune	Ghazaouet	Oran	Algiers	Bejaia	Skikda	Annaba	La Goulette	Sfax	
Algeciras	1,891	-	2,755	-	-	-	-	-	-	-	-	-	-	-	4,646
Almeria	-	304	-	34	553	-	35	10	-	-	-	-	-	-	936
Marseille**	-	-	-	-	-	-	-	50	237	25	22	10	238	4	586
Malaga	-	326	-	-	-	-	-	-	-	-	-	-	-	-	326
Genoa	-	-	55	-	-	-	-	-	-	-	-	-	222	-	277
Alicante	-	-	-	-	-	-	-	191	41	-	-	-	-	-	232
Sete	-	-	136	-	66	-	-	-	-	-	-	-	-	-	202
Barcelona	-	-	118	-	-	-	-	-	3	-	-	-	-	-	121
Palermo	-	-	-	-	-	-	-	-	-	-	-	-	67	-	67
Trapani	-	-	-	-	-	-	-	-	-	-	-	-	14	-	14
Las Palmas	-	-	-	-	-	13	-	-	-	-	-	-	-	-	13
TOTAL	1,891	630	3,064	34	619	13	35	251	281	25	22	10	541	4	7,420

*Due to lack of more detailed information, no distinction is made between the ports of Tangier and Tangier Med.

** In the absence of detailed statistical data for port-to-port flows from the port of Marseille, its passenger flows are derived from data of passenger lines and flows data provided from other ports.

Table II. Passenger flows (in thousands) on major routes between the ports of the North and South Shores of the GTMO 5+5. Source: CETMO-FLUX 2010 passenger data.

The two most important routes are in the Strait of Gibraltar: **Algeciras-Tangier** (2,755,000 passengers) and **Algeciras-Ceuta** (1,891,000). Their volumes are clearly greater than the other routes analysed, and account for 63% of all passengers travelling between the two shores of the GTMO 5+5. The importance of the area of the Strait is clearly manifested in the fact that the next most important routes are found in this area. They are: **Almeria-Nador**, **Malaga-Melilla** and **Almeria-Melilla**, with 553,000, 326,000 and 304,000 passengers, respectively. Thus, 78% of all passengers travel in the area of the Strait.

The port of Marseille is also of relative importance, with two notable routes in particular: **Marseille-La Goulette** and **Marseille-Algiers**, with 238,000 and 237,000 passengers, respectively.

The great importance of the port of La Goulette is clear; its 541 thousand passengers make it the most important port outside the vicinity of the Strait, and it is clearly the main port of entry to Tunisia. Nearly all passengers travelling through this port are on the routes to Marseille (238,000 passengers) and Genoa (222,000).

Less significant volumes travel on the routes **Alicante-Oran** (191,000), **Sete-Tangier** (136,000) and **Barcelona-Tangier** (118,000).

A map of these routes is shown in Figure I. The great importance of the area of the Strait is clearly evident.

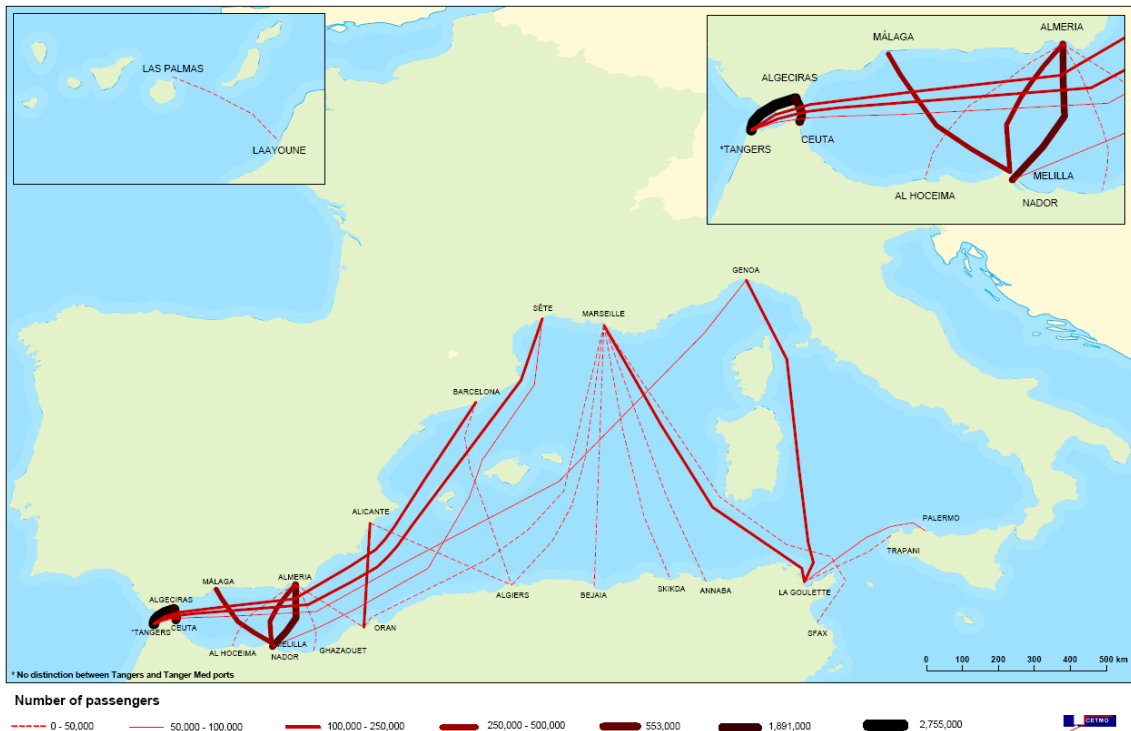


Figure 1. Map of the main passenger routes between the ports on the two shores of the GTMO 5+5. Source: CETMO-FLUX 2010 passenger data

2.4. Conclusions

The North-South flows of maritime passenger transport between the two banks of the GTMO 5+5 is very concentrated both geographically and in terms of ports. This is evident in the fact that 63% of all passengers moving between the shores travel on two of the 26 routes analysed (between Algeciras and the ports of Tangier and Ceuta). In terms of geography, the routes with the highest passenger volumes are concentrated in the area around the Strait of Gibraltar, the most important ports being Algeciras, Ceuta, Melilla, Almeria, Malaga, Tangier and Nador.

Notable routes with significantly lower volumes include Marseille-La Goulette, Marseille-Algiers, Genoa-La Goulette and Alicante-Oran, which highlights the importance of each of these ports for their respective countries: Marseille for France, Genoa for Italy, La Goulette for Tunisia and Algiers and Oran for Algeria.